Community Supervision JIMS2 System Tips & Tricks Guide

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Calendaring - Office Visit

#	Goal	Process	Notes
1	Schedule an office visit to display on the supervising officer's calendar and on the client's calendar.	From Caseload click on client's name > click the green **Calendar** tab > click on **Add New Event** > add an office visit.	
2	Enter results.	Select office visit > click the **Enter Results** button > select the Outcome and enter the Narrative (the Narrative will display in the casenote that is created) > click Next.	Events created from the client's calendar will display on the supervising officer's calendar.
3	Schedule next office visit using Finish & Schedule Next.	From the Office Visit Results Summary page, click **Finish & Schedule Next**.	Scheduling a future office visit sets the next contact date for that client. The next office visit date displays on the Caseload page and on the violation report and case summary report.
4	Schedule an office visit to display on another officer's calendar.	Use Search Calendars to access the calendar for the officer who will be seeing the client > click **Add New Event** > schedule an office visit > click Next. From the Caseload Search – Office Visit page, select the client from the appropriate caseload.	Examples: You are the supervisor who is taking care of cases from a "No Officer Assigned" caseload and need to set the next office visit on another officer's calendar. The file is in court being returned to the region and the CLO needs to set the next office visit on a CSO's calendar.

Calendaring – Group Office Visit

#	Goal	Process	Notes
1	Schedule a group office visit to display on your calendar and on the clients' calendars.	Click the Calendar link in the left navigation tree or click the blue Calendar tab to access your calendar. Verify that your name displays above the calendar. Click **Add New Event** > schedule a group office visit > click Next.	A group office visit cannot be scheduled from a supervisee's calendar. You have to start from an officer's calendar. When scheduling a group office visit to display on another officer's calendar, use Search Calendars to start from that officer's calendar.
2	Select clients for the group office visit and finish.	From the Caseload Search – Group Office Visit page, select clients. You can search by caseload or SPN to locate clients. Click **Create Group Office Visit** > enter event information > click Next > click Finish.	Authorized users can search for sex offenders by ZIP code or quadrant. Click the plus sign to the left of Selected Supervisee(s) to view attendees selected for the group office visit.
3	Add attendees to an existing group office visit.	From the Office Visits page, click the **Add Attendees** button. Search by caseload or SPN to locate clients > select clients > click **Add Selected** > click Finish.	Authorized users can search for sex offenders by ZIP code or quadrant.
4	Update a group office visit.	From the Office Visits page, click the **Update** button > modify event information > Next > Finish.	
5	Reschedule a group office visit.	From the Office Visits page, click the **Reschedule** button > change the date and/or time > Next > Finish.	Rescheduling a group office visit reschedules all clients associated to that event.
6	Enter results for a group office visit.	From the Office Visits page, click the checkbox next to clients with the same result > click the **Enter Results** button > select the Outcome that applies to all selected clients > enter the Narrative (the Narrative will display in the casenote that is created) > Next > Finish.	Results can be entered for all clients at once by clicking the select-all checkbox. The results must be the same for all clients selected.

7	Update results for a group office visit.	From the Office Visits page, click the radio button to select a client for whom results need to be updated > click the **Update Selected Results** button > update the record (the Narrative will display in the new casenote that is created) > Next > Finish.	Use this to fix results that were entered in error. The Update Selected Results button only displays when a record with results is selected.
8	Remove client from group office visit or delete event when last client is removed.	From the Office Visits page click on the Group Office Visit link for the appropriate client > click **Delete** to remove the client from the group office visit.	When the last client is removed from the scheduled group office visit, the group office visit is removed from the Calendar. Officers can remove clients from open group office visits (events for which no results have been entered). Supervisors can remove a client from closed office visits (events for which results have been entered).

Calendaring - Field Visit

#	Goal	Process	Notes
1	Create a field visit itinerary.	Access your Calendar by clicking the Calendar link in the left navigation tree or the blue Calendar tab > click **Add New Event** > select to create a field visit for a date for which you do not already have an itinerary > click Next > enter itinerary and click Next.	You will use one field visit itinerary per day.
2	Add a field visit to an itinerary.	Search any officer's caseload to add a client to your field visit > click the radio button to the left of the name to select the client > click **Create Field Visit** and complete the workflow.	
3	Add a client from a different officer's caseload.	From the Field Visit Itinerary page click **Add Field Visit** > search a different officer's caseload > select a client to add and complete the workflow.	
4	View the itinerary.	From the Field Visit Itinerary page click the plus sign ⊞.	
5	Print the Itinerary.	From the Field Visit Itinerary page click the **Print Itinerary** button.	
6	Update the itinerary.	From the Field Visit Itinerary page click the <u>Update</u> link on the Itinerary Information line and modify the itinerary.	
7	Reschedule multiple field visits at once.	From the Field Visit Itinerary page, click the <u>Reschedule Multiple Field Visits</u> link on the Itinerary Information line > click in the checkbox to select clients to reschedule > click Reschedule > Next > Finish.	Click in the select-all box to select all records.

8	Reorder the itinerary.	From the Field Visit Itinerary page, click the **Reorder Itinerary** button > enter appropriate numbers in the # column > change the time as needed > Save & Continue.	
9	Print Field Report Form.	From the Field Visit Itinerary page, click the radio button to the left of the record to select > click the **Print Field Report Form** button >open the PDF document.	You can close the Chronological Field Report without printing.
10	Enter results for a field visit.	From the Field Visit Itinerary page, click the radio button to the left of the appropriate record > click **Enter Results** (the Narrative will display in the casenote that is created) > Next > Finish.	You also have the option to Finish & Schedule Next.
11	Change results for a field visit.	From the Field Visit Itinerary page, select a field visit for which results have been entered > click the **Update** button at the bottom of the page > The Narrative will display in the casenote that is created > Next > Finish.	A casenote is created when results are entered or updated. Forthcoming - Casenotes created through the calendar will be saved in draft status.
12	View casenotes.	From the Field Visit Itinerary page, click the client's name > from the Details page click the Casenotes button.	Extra casenotes can be deleted if needed.

Program Referrals

#	Goal	Process	Notes
1	Access the Program Referral List page.	From Caseload click on the client's name > click on the green **Program Referrals** tab.	
2	Initiate new referrals.	Click **Initiate New Referral** > select case > Next > select referral types > Click Save & Continue.	Multiple referrals can be created by selecting multiple referral types.
3	Sort the list of service providers by Region.	From the Initiate Program Referral - Select Service Provider page locate the Region column, click the sort icons ▲ ▼	Use the down arrow to sort in descending order.
4	Filter the list of service providers by Region, Sex, Language or Contract type.	Make selections in the Filter Service Provider section > click **Filter**. Click Refresh to remove the filter.	For example: to filter the list to providers that offer contract programs, select Yes in the Contract Program drop-down list.
5	Print Packet	Click the checkbox to select particular service providers or use the select-all box to select all listings > click the **Print Packet** button.	Selected referral types are listed at the top of the Service Provider page and corresponding numbers display to the right of each service provider name. Print Packet is also available from the Program Referral List page.
6	Return to the Program Referral List.	Click the green Program Referrals tab to return to the Program Referral List page.	Forthcoming: Allow entry/update of Referral Date.
7	Update referral information.	Click the radio button to select a referral > Click **Update** > Select Case > Next > Save & Continue.	Update allows you to change data that was displayed during the Initiate Referral workflow.
8	Select service provider.	From the Update Program Referral – Select Service Provider page, click the radio button to the left of the service provider the client selected > Click Next.	Update Referral is used to select a service provider and add or change the program location the client selected.

9	Select program location.	On the Update Program Referral – Select Program page, select the program location to indicate where the client is attending the program > Next > Finish.	⊗ This symbol displays to the right of a referral type when that referral type is not progressed (generally because a duplicate exists). ⚠ This symbol displays to the right of a program identifier when that program is under investigation.
10	View details and report issues.	From the Select Program page, click on the service provider's name to see details about the provider. Click on the program identifier to see details about the program.	To report problems with a program, click the Report Issue icon ✉, enter information and click Submit.
11	Generate form.	From the Program Referral List page, click the radio button to select a referral > click Generate Form > click on the form link > add the Program Name and Reason for Referral > click Next > Finish > Print Form.	Reason for Referral explains to the agency the reason the client is referred.
12	View Program Referral casenotes.	While generating the form, click the View Program Referral Casenotes link. When finished viewing the casenotes, click Close Window.	
13	Return to the Program Referral List.	From the Form Confirmation page, click the **Referral List** button.	
14	Submit referral to enter the begin date.	Select a referral and click the **Submit Referral** button > Add the Begin Date, select a Reason for Placement, enter Comments > Click Next > Finish.	**Program Begin Date cannot be a future date.** A referral with a begin date is an open referral.
15	Exit referral.	Select the referral and click **Exit Referral** > enter the end date and reason for discharge (comments are optional) > Next > Finish.	Fix forthcoming: Comments field should be blank.

16	View exited referrals.	In the Filter Programs section, click the Exited box then click **Filter** to view exited referrals.	
17	Re-refer an open referral and print appointment card.	Select an open referral and click **Re-Referral** > Enter information > Next > click **Print Appt** > click Close in pop-up window > Finish.	The Re-Referral button only displays when an open referral is selected.
18	View program details about a referral.	Select the referral and click **View** > from the Program Referral Details page, click the link in the Identifier column to view program details.	
19	Create a casenote for a referral.	From the Program Details page, click **Create Casenote** > click the + sign to view Program Referral Information > enter casenote text > Next > Finish.	The Create Casenote button can also be selected from the Program Referral List page.
20	View casenotes for referral.	Select a referral for which there are casenotes. Click **View Casenotes.** When finished click Close Window.	Casenotes are automatically created when a referral is submitted, re-referred or exited and when forms are generated.
21	Remove entry (remove the program begin date and reason for placement).	Select a referral that has a begin date then click **Remove Entry** > click Finish.	The Remove Entry button only displays when an open referral is selected. Remove Entry changes the referral status from open to initiated.
22	Remove exit (remove end date and reason for discharge).	Select a referral that has an end date then click **Remove Exit** > click Finish.	The Remove Exit button only displays when an exited referral is selected. Removing the end date changes the referral status from exited to open (submitted).

Compliance

#	Goal	Process	Notes
1	Access Compliance.	From the Supervisee Details page, click the green Compliance tab. Access Supervisee Details in one of three ways: Supervisee Search > Search by SPN, name or case number > click View Profile. Caseload > Search by SPN > click on client's name. Caseload > Select client from officer's caseload > click on client's name.	
2	Filter conditions.	Make selections in the Filter Conditions section > click **Filter**.	Use the "Show" field to select conditions that are compliant, non-compliant or both.
3	View Court Policies or Department Policies associated to conditions.	Click the plus sign to the left of a condition > click the plus sign to expand Associated Court Policies and/or Associated Department Policies > click on an underlined listing to view details > click Close Window.	
4	View all conditions.	In the Filter Conditions section > click **View All** to display all conditions.	
5	Add a noncompliance event.	Click in the checkbox to the left of the appropriate conditions > click the **Set to Noncompliant** button > add the event occurrence date, select one or more Event Types > click Next. From the Set Conditions to Noncompliant – Casenote page, click the plus sign in the Noncompliance Events section to view the noncompliance information. Add Casenote > Select to finish casenote later.	Multiple conditions can be set to noncompliant at the same time. If you select Event Type "Positive UA" or "Positive UA Non-Prescribed RX" the Details field becomes required. Enter the name of the substance exactly as it appears in the lab report. Selecting to finish a casenote later saves the casenote in draft status.

6	View Casenotes	Click the View Casenotes link to the right of a condition.	
7	Add a noncompliance event for an office visit created in Calendaring.	Select the Report in Person condition > Set to Noncompliant > Add Event using scheduled office visit date and time > Next > Add Casenotes > Finish.	
8	Create Condition Casenote.	Select conditions to be associated with the casenote > Select the **Create Condition Casenote** button > create a casenote > click Finish.	Multiple conditions can be selected for the condition casenote. View Condition Casenotes using the Casenotes button.
9	Filter conditions to view only noncompliant conditions.	In the Show field, click the radio button beside the red X, and then click **Filter**.	Noncompliant conditions are listed first under Supervisee Conditions.
10	Resolve noncompliance.	Select condition > Click the **Resolve Noncompliance** button > select Compliance Reason > Next > add a casenote and complete the workflow.	An officer can resolve noncompliance.
11	Decrement the noncompliance event count.	Locate the condition that was set to non-compliant in error > Select the Decrement link to the left of the condition> click the radio button to select the Noncompliance Event > Next > Finish.	CSO Supervisors decrement the noncompliance event count when a condition was set to noncompliant in error.

Violation Report

#	Goal	Process	Notes
1	Access Case History page.	From Caseload click on a client's name > click the Cases tab.	Violation and Case Summary reports are accessed from the Case History page.
2	Create violation report.	From the Case History page, select the active case > click **Violation Reports** > click **Create Violation Report** and click the <u>Update</u> link in each section to complete each section.	Spell check will be added to each Comment field. Forthcoming: the Comment fields will allow a maximum of 3500 characters.
3	Update the Reporting section.	Click the <u>Update</u> link in the Reporting History section.	Reporting information is populated from noncompliance events created for conditions where Group 1 = Reporting. When the last F2F > 90 days then the last known address from PTY will also display in this section.
4	Remove a displayed record.	After clicking an <u>Update</u> link, select a displayed record > click the **Remove Selected** button > click Next > click Finish.	Multiple records can be selected and removed at one time.
5	Refresh to remove manually entered data and restore source records.	After clicking an <u>Update</u> link, click the **Refresh** button > click Next then Finish.	Refresh restores source data that displays automatically. See the chart titled Violation Report Source Records. Changes made in the section are lost.
6	Add a record.	After clicking an <u>Update</u> link, click the **Add** button > enter information > Next > Finish.	Manually added records display in *italics.*

7	View Positive Urinalysis data.	Access the Positive Urinalysis section by clicking the Update link.	Positive Urinalysis is populated with noncompliance events created for either of the following Event Types in Compliance: **Positive UA** **Positive UA – Non-Prescribed RX** The Substance field is populated with details entered in the noncompliance event record.
8	Return to the Violation Report List.	From the Update Violation Report page, click the **Violation Reports List** button at the bottom of the page.	Notice the report is saved in draft status.
9	View the Report.	Click the **View** button.	Update links do not display on the View Details page.
10	View Casenotes.	Click the Supervisee tab > click the **Casenotes** button to view the Casenote Journal. Click Back twice to return to the Violation Report page.	
11	Submit the Report for Approval.	From the Violation Reports List page > click **Update** > click **Submit For Approval**.	This sends a task to the officer's supervisor.

Tasks

Assignment Tasks

#	Goal	Process	Notes
1	Search Tasks by SPN.	From the Task Search page, click the Advanced Search link > in the Tasklist Type field select SPN > Enter a SPN > The Status defaults to Submitted > click **Submit**.	To select more than one status, such as Accepted and Submitted, hold down the Ctrl key and click on multiple status listings.
2	Search for tasks assigned to another officer.	From the Task Search page > click the Advanced Search link > in the Supervisor field select the supervisor's name > click Get Officers > select the officer > click Submit.	Use Advanced Search to locate and progress tasks assigned to another person in your program unit.
3	Return Assignment	The **Return Assignment** link displays on the Assign Supervisee to Officer – Caseload Summary page. Use this link to return an assignment task to your intake workgroup. In the Return Reason field, indicate why the assignment is being returned and where to reassign it.	CSO Supervisors use Return Assignment to have the casefile / assignment sent to a different program unit.
4	Access documentation about Assignments.	Click Home in the left navigation tree > Click the link to view JIMS2 Manuals > Click the CSCD Diagrams link. Click the Assigning Cases to an Officer link.	

Caseload Searches

#	Goal	Process	Notes
1	Inquire on a caseload.	From Caseload, Search for an officer's caseload.	
2	Transfer to Casenotes from Caseload and then back to Caseload.	Click the Casenotes icon to the left of the client's name. From Casenotes, click the Back button or click the Caseload link in the left navigation tree.	
3	Determine the date of the next office visit for a client.	Check the column labeled **Next OV**.	Days left is calculated from the supervision end data and displays in red when it is 30 days or less.
4	Determine the date of the last face-to-face visit.	Check the column labeled **Last F2F**.	For a field visit this is the last complete visit where the Method of Contact was Direct Contact.
5	Resort the list by SPN, by Jail Status, by Warrant Status and then by Days left.	Use the sort icons in each column ▲▼ (J = Jail Status, W = Warrant Status).	To see clients with open warrants resort the list by Warrant Status in descending order (Y = yes).
6	Access the last page of the caseload.	In the Page field, type a page number then click the Page link.	
7	Filter the caseload by cases assigned to a particular court.	In the Search By Caseload section, enter a number in the Court field > click **View Caseload.**	
8	Filter the caseload by clients in a particular ZIP Code.	In the Search By Caseload section, enter a number in the Zip Code field > click **View Caseload**.	The client's address is available on the Supervisee Details page.
9	View Workload from Caseload page.	In the Search by Caseload section, click the **Workload** button.	This replaces APWI – the Workload Formula Inquiry Screen.

Caseload Reports

#	Goal	Process	Notes
1	Access a list of all office visits, field visits or other events on the displayed officer's calendar.	Use Search by Caseload to locate the officer's caseload. In the Current Caseload section, click the OV/FV/OTH link > select the category > select the date range > click Submit.	The date range defaults to the current month. If events for your clients are on another officer's calendar, first inquire on that officer's caseload, and then click the OV/FV/OTH link to view a report for that officer's calendar.
2	Access a list of cases assigned to and removed from a caseload.	From a caseload, use the In & Out Activity link in the Current Caseload section.	Fixes are forthcoming to improve this report.
3	Access a list of clients on a caseload referred to a particular service provider.	From a caseload, click the Program Referral Provider link > enter the name of the service provider > click Submit > select provider and click **View Caseload**.	You can enter the first few letters of the provider name and then * (the wildcard character).
4	Return to Caseload.	Click Cancel or click Caseload in the left navigation tree.	
5	Access a list of clients on a caseload referred to a particular program.	From a caseload, click the Program Referral Provider link > select to Search By Program > enter program name > click Submit > select listing and click **View Caseload**.	You can enter the first few letters of the program name and then * (the wildcard). Example: TEX* You can also search by program group.
6	View the program referral details.	From the Caseload by Program Referral Provider page, select client > click **View Program Referral**.	

Level of Supervision (LOS)

Current Process:

- Add – Use to update the current LOS.
- Correct current LOS - Fix error in current LOS by adding a new LOS then delete the former record.
- Correct history record – use to correct an LOS history record that is in error.

#	Goal	Process	Notes
1	Access LOS History.	Access Supervisee Details > in the LOS section of the page, click View History.	LOS is recorded at the time a new order is activated and assigned to a caseload.
2	Correct LOS history record.	From the LOS History page, select the history record that displays in error then click the **Correct** button.	
3	Create a future LOS.	Access Supervisee Details > in the LOS section of the page click Add.	You can set the Effective Date in the future; however the selected LOS will display immediately.

Forthcoming:
Allow correction of current level of supervision without having to add a record and delete the inaccurate record.

Casenotes (Chronos)

#	Goal	Process	Notes
1	Search casenotes.	Select Casenotes from the left navigation menu > search by SPN, case number or name > click Submit.	To view casenotes from a previous supervision period, click Previous.
2	Create a casenote.	From the Casenotes List page click the **Create Casenote** button. To expand the casenote literal field, place your cursor over the expand icon at the bottom right of the field, click and drag the field open. 	This expand feature is also available in the Field Visit Narrative field where results are entered.
3	Get answers to frequently asked questions including problems printing casenotes.	Click the **Home** link in the left navigation tree > Click the <u>CSCD FAQs</u> link > click on the link labeled <u>I am having problems printing casenotes</u>.	

Forthcoming: Display LOS on Casenote header.

Access answers to frequently asked questions (FAQs) --
http://www.hctx.net/CmpDocuments/70/manuals/cscd_faq.htm#faq5

Search Supervision Conditions

#	Goal	Process	Notes
1	Access Search Supervision Conditions.	Click the + sign to the left of Common Supervision > Click the + sign to the left of Supervision Condition > click Search supervision Condition.	**There are 44,190 special conditions in production as of August 20, 2010. This is after less than 8 months of use.**
2	Search Supervision Conditions – View Non-Standard Conditions.	Click Submit to view all non-standard conditions.	
3	Search Condition Literal using keyword search.	Click Refresh > enter words or letters in the **Condition Literal** field > click Submit.	Event types set on conditions are used in non-compliance events.
4	Search by Group 1.	Click the Search Supervision Condition link. Select a listing from the Group 1 drop-down list > click Submit.	
5	Search by condition name using * the wildcard character.	Click the Search Supervision Condition link > Enter the first letters of the condition name followed by an asterisk, example: Report* > Click Submit.	
6	View Supervision Condition.	From the Supervision Condition Search Results page, click on a condition name. Click the + sign next to Supervision Condition to view details. Click the + sign next to courts to view the courts for which this condition is valid.	

PASO – Search for Conditions

#	Goal	Process	Notes
1	Access PASO and create or update an order.	From any CSCD page, click the blue Process Orders tab > enter the SPN > click Submit. Select the record > click **Create Order** or **Update Order** > fill in required fields > when visible click the **Add/Remove Conditions** button.	**Conditions are used in Compliance.**
2	Search by Condition Name.	From the Add/Remove Conditions page, search for the condition using the Condition Name.	If no response is found try other searches below before creating a special condition.
3	Search by Condition Name using * wildcard character.	Click Refresh > enter the first letters of the condition name followed by an asterisk, example: Rep* > Click Submit.	
4	Search by Condition Literal.	In the Condition Literal field enter words or letters, example: SAFPF > Click Submit.	
5	Save the order.	Select Save & Continue > Enter Details > Validate Fields > Save & Continue.	