JIMS 2

Common Supervision

User Training Guide for 1.0 Release

Version 1

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JIMS2 CSCD User Training Guide – 1.0 Release

Overview

Introduction

This training guide is designed to teach authorized CSCD users how to use the following JIMS2 functionality:

- Caseload
- Supervisee Details
- Calendar
- PASO
- Program Referrals
- Compliance
- Violation Reports and Case Summaries
- Tasks/Assignments
- Casenotes

Contents

This training guide contains the following training modules:

Online Help

Introduction

This training module explains the types of Help available to users and how to access that help.

The JIMS2 CSCD system includes several types of online help for users including:

- **Context Sensitive help**
  Each screen in the JIMS2 CSCD application includes a Help link explaining the functionality of that screen.

- **A searchable help index**
  A searchable index of how to topics, Frequently asked questions (FAQs) and various JIMS2 documents including training guides.

- **FAQs**
  A list of frequently asked questions is accessible through the index of the online help system.

- **Training Guides**
  All training guides used during JIMS2 training sessions are available through the index of the online help system.

- **News & Notices section on the Welcome to JIMS2 screen**
  This includes: a link to Usability Tips for JIMS2, a link to the JIMS2 training guides, and to login demonstration videos for users having difficulty logging in to JIMS2.

Access Help for a specific Screen

To access Help for any screen you are currently viewing in JIMS2 click the Help link located in the top right corner of any JIMS2 screen. Help will open in a separate window.

Search the Help System

To access a searchable Help Index for JIMS2, click the Help link located in the top right corner of any JIMS2 screen. Then click the link that says **Click Here to Search Help**. Type any topic into the search field.

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Online Help, Continued

FAQs

Users are encouraged to submit FAQ to the online help system through their data services division.

These can be added to the online help system and make it more robust for the average user.

To access the FAQs for JIMS2:

1. Click the Help link located in the top right corner of any JIMS2 screen. Help will open in a separate window.
2. Click the link that says **Click Here to Search Help**.
3. Type FAQ into the search field.
4. Click GO.

Training Guides

The guides used for JIMS2 training are located within the online help system.
To access the training guides for JIMS2:

1. Click the Help link located in the top right corner of any JIMS2 screen. Help will open in a separate window.
2. Click the link that says **Click Here to Search Help**.
3. Type Training Guides into the search field.
4. Click GO.
5. Click the content folder labeled Training Guides.

Usability Tips

The usability tips for the JIMS2 application are located in the News and Notices section on the JIMS2 login screen. These tips provide important information about setting up your browser as well as tips for trouble shooting common problems using JIMS2 such as:

- NEVER use your browser back button and
- Never copy and paste from any program other than note pad when working in JIMS2.

User Feedback

The JIMS2 CSCD system is your system. If you have suggestions for improving the system, please submit those to your data services division.

A list of pending user suggestions can be viewed on the login screen by clicking on the link **User Feedback for CSCD** located in the News and Notices section on the JIMS2 login screen.

Caseload

Introduction

This training module provides the detailed steps a user will follow to view an officer's entire caseload and the steps to view the just the case(s) for a specific supervisee using the JIMS2 Caseload functionality.

Steps to View an Officer's Caseload

Follow the steps below to use Caseload Search to view the current caseload for an officer:

Step	Action
1	Click the + sign next to **CSCD** in the left navigation tree.
2	Click the + sign next to **Caseload** in the left navigation tree.
3	Click **Caseload**. The case load for the logged in user will display if the logged in user is assigned to a position with a current caseload. **NOTE:** If the logged in user is not assigned to a position with a current caseload an error message will state **User not assigned to a staff position in a division.** To view the caseload of another officer in the same division as the logged in user, continue to the next step.
4	Select the **Supervisor** that the officer is assigned to from the drop-down menu provided. **NOTE:** Once a supervisor is selected, you can click **Workload** to view the current workload of all officers assigned to that supervisor. The workload will display with the next officer up for assignment listed first.
5	Click **Get Officers.**
6	Select the **Officer** from the drop-down menu provided. **NOTE:** For CCOs who need to search for sex offenders, you can also enter a Zip Code to filter the search by quadrant.

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Caseload, Continued

Steps to View an Officer's Caseload (continued)

Step	Action
7	Click **View Caseload**. A list of all supervisees on the requested caseload will display. • Use the page field,  , to page through the caseload by clicking the right and left arrows as needed, or by entering a specific page number in the **<u>Page</u>** field and clicking on the word **<u>Page.</u>** • To perform a search for another officer's caseload click **Refresh** and repeat steps 4-7**.**
8	Click the plus sign next a listed supervisee to view all cases for that supervisee. **NOTE:** To transfer to the Supervisee Details screen for a listed supervisee, click on the supervisee's name. The section of this guide titled *Supervisee Details Functionality Overview* explains this screen in detail.

Steps to view case(s) for a specific supervisee

Follow the steps below to to view just the cases for a specific supervisee:

Step	Action
1	Click the + sign next to **CSCD** in the left navigation tree.
2	Click the + sign next to **Caseload** in the left navigation tree.
3	Click **<u>Caseload</u>**. The following screen will display.
4	For the **Search By** field select SPN from the drop-down menu provided.
5	Type in the SPN number.
6	Click **Submit.** The requested supervisee will display.

Caseload Functionality Overview

Introduction

This training module provides an overview of the functionality available through the Caseload screen.

Caseload Functionality Overview

The following list is an overview of how to access all the functionality available through the Caseload screen:

- Click the plus sign next to a listed supervisee to view their active supervision cases.
- Click on a listed case number to view the current supervision order (conditions of probation) for that case in a separate window.
- Select the check box next to a listed case and click **Request Reassignment to CLO** to request reassignment of that case.*
- Select the check box next to a listed case and click **Reassign** to make the case reassignment.*
- Select the check box next to a listed case and click **Close Case** to close the supervision file.*
- Select the check box next to a listed case and click **Transfer In** to transfer in the supervision file.*
- Select the check box next to a listed case and click **Transfer Out** to transfer out the supervision file.*

  * **NOTE:** The buttons that are available after clicking the check box next to a listed case will vary depending on the level of security assigned to your user role in JIMS2. For example, only the transfer until will see the Transfer In and Transfer Out button and only supervisors will see the reassign button.

- Click the **OV/FV/OTH** link to view a report listing office visits, field visit and other events on the supervisee’s calendar during a specified date range.

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Caseload Functionality Overview, Continued

Caseload Functionality Overview (continued)

- Click the link **Filter By <u>Program Referral Provider</u>** to display all supervisees currently being treated by a specified provider. Input the provider name (you can use a partial name with an * for a broader search). For example, type in county jail * and click **Submit.** Select the provider from the search results list by clicking the appropriate radio button. Click **View Caseload.** A list of all active supervisees currently assigned to that provider will display. You can also search by program type.

- Click the **<u>In & Out Activity</u>** link to view the in and out activity report for the supervisee.

- Click the blue tab labeled **Calendar** at the top of the Caseload screen to transfer to the officer's calendar.

- Click the blue tab labeled **Tasks** at the top of the Caseload screen to transfer to the officer's task list.

- Click the blue tab labeled **Process Orders** at the top of the Caseload screen to transfer to the Process Supervision Order – Search screen. **NOTE:** In JIMS2 there are several functions that can be performed in more than one way. Remember the Process Supervision Order – Search screen is also available by selecting **<u>Supervision Order</u>** from the left navigation tree under Common Supervision, Process Adult Supervision Order.

- Click the blue tab labeled **Caseload** at the top of the Caseload screen to refresh the screen and perform a search for another officer's caseload.

- Click the blue tab labeled **Casenotes** at the top of the Caseload screen to search for casenotes about a supervisee.

- The caseload screen also has a resort feature for every column. Click the up and down blue arrows for each column to resort.

- Click the **Refresh** button to clear the screen and perform a new caseload search. Click the blue tab labeled Caseload to redisplay the current officer's caseload.

Supervisee Details Functionality Overview

Introduction

This training module provides an overview of the functionality available on the Supervisee Details screen.

Supervisee Details Functionality Overview

The following list is an overview of how to access all the functionality available through the Supervisee Details screen:

- Click **View Active Cases** button located in the Name Information section of the screen to view a list of the supervisee's active cases.
- Click the plus + sign next to any of the following sections: Descriptive Information, Address Information, Identification Numbers Information, Employer Information, Education Information, LOS Information and/or Transfers to view the details for that section.
- Click the green tab labeled **Supervisee** to display Supervisee details screen.
- Click the green tab labeled **Associates** to view, add, update or delete associate information for a supervisee.
- Click the green tab labeled **Calendar** to view, add, update or delete an event on a supervisee's calendar.
- Click the green tab labeled **Cases** to view, add, update or delete violation reports or Case Summary Information (blue sheet) for a supervisee.
- Click the green tab labeled **Program Referrals** to view, add, update or delete program referral information for a supervisee or print a referral packet for a supervisee.
- Click the green tab labeled **Assessments** to enter an assessment for a supervisee.
- Click the green tab labeled **Compliance** to view conditions for which a supervisee is non-compliant, to record non-compliance on a supervision condition or set a condition back to compliant.

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Supervisee Details Functionality Overview, Continued

Supervisee Details Functionality Overview (continued)

- Click the blue tab labeled **Calendar** at the top of the Caseload screen to transfer to the officer's calendar.
- Click the blue tab labeled **Tasks** at the top of the Caseload screen to transfer to the officer's task list.
- Click the blue tab labeled **Process Orders** at the top of the Caseload screen to transfer to the Process Supervision Order – Search screen.
- Click the blue tab labeled **Caseload** at the top of the Caseload screen to refresh the screen and perform a search for another officer's caseload.
- Click the blue tab labeled **Casenotes** at the top of the Caseload screen to search for casenotes about a supervisee.

LOS Add

Follow the steps below to add LOS information for a supervisee:

Step	Action
1	Access the Supervisee details screen.
2	Click the Add link located to the right of the LOS Information section.
3	Enter the Effective Date.
4	Select the Supervision Level from the drop-down menu provided.
5	Enter any Comments.
6	Click **Submit.**
7	Click **Finish.**

NOTE: The LOS information will not have to be added in the production system. All LOS information will be populated when a case is generated by intake staff and when assessment updates occur. In the production JIMS2 system users will only update the LOS when necessary.

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Supervisee Details Functionality Overview, Continued

Update the LOS

Follow the steps below to view LOS history and correct or delete information for a supervisee.

Step	Action
1	Access the Supervisee Details screen.
2	Click the **View History** link located to the right of the LOS Information section.
3	Select the radio button next to the LOS to be updated.
4	Click **Correct.**
5	Enter the **Effective Date.**
6	Select the Supervision Level from the drop-down menu provided.
7	Enter Comments.
8	Click **Submit.**
9	Click **Finish.**

Transfer View History

Follow the steps below to view a supervisee's transfer history:

Step	Action
1	Access the Supervisee Details screen.
2	Click the **View History** link located to the right of the Transfers section.

Calendar

Introduction

This section explains the JIMS2 functionality **Calendar.** Authorized CSCD employees can view and maintain a calendar for:

- a supervision officer's events
- a supervisee's events

The outcome or results of calendar events can be maintained on both the officer's and supervisee's calendar. This training module explains maintaining calendar events from the officer's calendar.

NOTE: The calendar for the Officer is displayed via the blue Tabs on the Caseload screen or the Supervisee Details screen. The calendar for the supervisee is displayed by selecting the green calendar tab on the Supervisee Details page.

Officer Events

An officer's calendar may display the following three main types of events:

- Field Visits
- Office Visits
- Other Events

Other Events may include:

- Meeting
- Other
- Court Date
- Scheduled Time Off
- Training
- UA

Supervisee Events

A supervisee's calendar may display the following three main types of events:

- Field visit
- Office Visit
- Other Events

Other Events on a supervisee's calendar may include:

- Meeting
- Other
- Polygraph
- Training
- UA

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Calendar, Continued

View an Officer's Calendar

Follow the steps below **to view an officer's calendar:**

Step	Action
1	Select **Calendar** from the left navigation tree under CSCD Or Select the Blue Calendar tab at the top of the Caseload screen. The calendar for the logged in officer will display. Or To view the calendar for another officer in your division, continue to step 2.
2	Select the appropriate Supervisor's name from the drop-down list provided.
3	Click **Get Officers**. The officers for the selected supervisor display in a drop-down list.
4	Select the Officer's name from the drop-down list.
5	Click **View Calendar**. The selected officer's calendar will display.

View a Supervisee's Calendar

Follow the steps below **to view a Supervisee's calendar:**

Step	Action
1	Access the Caseload screen. Click on the name of a listed supervisee to display the Supervisee Details screen.
2	Click the Green Calendar tab on the Supervisee Details screen.

View details for a calendar event on an officer's calendar

Follow the steps below to view the details of an entry on an officer's calendar:

Step	Action
1	Follow the steps above to view an officer's calendar.
2	Click on any **Office Visit**, **Field Visit** or **Other Event** link that is displayed on any calendar date.

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Calendar, Continued

View details for a calendar event on an officer's calendar (continued)

Step	Action
3	If you click **<u>Office Visit</u>**, The Office Visits screen will display all Office visits and Group Office Visits scheduled for that date. If you click **<u>Field Visit</u>** The Field Visit Itinerary screen will display all supervisees scheduled on that itinerary. If you click **<u>Other Event</u>** the Other Events screen will display all other events scheduled on that day.
4	From the Office Visits screen, **To view details for an office visit or group visit:** Click on any listed <u>OFFICE VISIT</u> or <u>GROUP OFFICE VISIT</u> link listed in the **Event Type** column**. NOTE:** This transfers out of the Officer's calendar and to the details screen which is listed under the green calendar tab for the supervisee because the event details are part of the supervisee's record. From the Field Visit Itinerary screen, **To view details for a field visit with a listed supervisee:** Click the radio button next to a supervisee on the itinerary and click **View. NOTE:** This transfers out of the Officer's calendar and to the details screen which is listed under the green calendar tab for the supervisee because the event details are part of the supervisee's record. From the Other Events screen, **To View details for an other event:** Click on any listed <u>OTHER EVENT</u> link listed in the **Event Type** column**.**

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Calendar, Continued

Add a calendar event to an Officer's Calendar

This section details the steps for adding events to an officer's calendar. The four main types of events that can be added are:

- Office visits
- Group office visits
- Field visits, and
- Other events

Follow the steps below to **add an office visit to an officer's calendar**:

Step	Action
1	From a displayed officer's calendar.
2	Click **Add New Event** at the bottom of the calendar**.**
3	Select the **Event Date**.
4	Select OFFICE VISIT from the **Event Type** drop-down list.
5	Click **Next**.
6	Click the radio button next to the supervisee for which the office visit is being scheduled. **NOTE:** You can page through the caseload or search for a specific supervisee by SPN.
7	Click **Create Office Visit.**
8	Fill in all details.
9	Click **Next.**
10	Click **Finish.**

Follow the steps below to **add a group office visit to an officer's calendar**:

Step	Action
1	Follow the steps to View an officer's calendar.
1	Click **Add New Event.**
2	Select the **Event Date**.
3	Select the Event Type: GROUP OFFICE VISIT
4	Click **Next.**
5	Click the check box next to each supervisee who is to be included in the group office visit.
6	Click **Create Group Office Visit.**
7	Fill in all screen fields. **NOTE:** proper format for all time entries is: 00:00
8	Click **Next.**
9	Click **Finish.**

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Calendar, Continued

Add a calendar event to an Officer's Calendar (continued)

Follow the steps below to **add a field visit and create a filed visit itinerary**:

Step	Action
1	Follow the steps to view an officer's calendar.
2	Click **Add New Event.**
3	Fill in Event Date.
4	Select Field Visit from the Event Type drop-down menu.
5	Click **Next.**
6	Fill in all fields on the Create Itinerary screen. Required fields are denoted by the ♦. **NOTE:** For users with sex offender Caseload the Quadrant field is required. All time is entered in the 00:00 format.
7	Click **Next.**
8	Select the radio button next to the first supervisee to be added to the field visit itinerary.
9	Click **Create Field Visit.**
10	Fill in all required fields for that supervisee. **NOTE:** The Validate and Research address buttons display above the address section. Input an alternate address and click **Validate** to view whether the status of the address is VALID or INVALID. If an address has not been validated the status will say UNPROCESSED. OR Input an address and click **Research** to open a separate search window that allows you to input an address and obtain information such as the key map location.
11	Click **Next.**
12	Click **Finish.** (Repeat the process for all Supervisees.)
13	To add additional supervisees to the itinerary, click **Add Field Visit** and repeat steps 8-12.

Follow the steps below to **add an Other Event to an officer's calendar**:

Step	Action
1	From a displayed officer's calendar.
2	Click **Add New Event** at the bottom of the calendar**.**
3	Select the **Event Date**.
4	Select the needed event type from the **Event Type** drop-down list.
5	Click **Next**.
6	Fill in all event details.
9	Click **Next** and then click **Finish.**

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Calendar, Continued

Add an event to a supervisee's calendar

Follow the steps below to **add an event to a supervisee's Calendar:**

Step	Action
1	Follow the steps to display a supervisee's calendar.
2	Click **Add New Event.**
3	Select the event type to be added from the drop-down menu provided.
4	Progress through the screens in the same manner as explained above in the section titled *Add and event to an officer's calendar*.

Office Visits screen

Update, Enter Results for, Reschedule or Delete an office visit or group office visit on an officer's calendar using the Office Visits screen.

Access the Office Visits screen by following the steps in the section above titled *View details for a calendar event on an officer's calendar*.

Follow the steps below to **Update, Enter Results, Reschedule or Delete an office visit on an officer's calendar:**

Step	Action
1	Follow the steps above to View details for a calendar event on an officer's calendar.
2	From the Office Visits screen, select the radio button next to the office visit to be updated and click: • Update • Enter Results or • Reschedule And continue to step 3 Or **To Delete an office visit,** click the OFFICE VISIT link under the column heading Event Type and then click **Delete** and **Finish.** **NOTE:** Deleting an office visit on the officer's calendar will also delete the office visit from the supervisee's calendar.
3	Fill in all fields that are required or need updating.
4	Click **Next**
5	Click **Finish.**

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Calendar, Continued

Office Visits screen (continued)

Follow the steps below to:

- **enter results of a scheduled open group office for a supervisee/s**
- **make updates to a supervisee who attended or was absent from a closed group visit**
- **delete a supervisee from a group office visit**

Step	Action
1	Follow the steps to display an officer's calendar.
2	Click on the **Office Visit** link that is displayed on calendar date for which the group office visit was scheduled.
3	The Office Visits screen will display all Group Office Visits scheduled and/or marked absent or attended for that date.
4	**In the section titled Open Group Office Visits:** **To enter results for a supervisee listed as scheduled in the Open Group Office Visits Section:** Click the check box next to one or more supervisees listed as scheduled and click **Enter Results**. OR **To update all scheduled attendees at one time** click the **Update** button located above and to the right in the Open Group Office Visits section. OR **To update information for a supervisee already marked absent or attended in the section for Closed Group Office Visits:** Click the radio next to a GROUP OFFICE VISIT for a listed supervisee and click **Update Selected Results.** **Then continue to step 6.** OR **To delete a supervisee from a group office visit:** Click the GROUP OFFICE VISIT link for a listed supervisee. Click **Delete** and **Finish.**
6	Select an **Outcome** from the drop-down menu provided and enter a Narrative and/or purpose.
7	Click **Next.**
8	Click **Finish.**

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Calendar, Continued

Field Visit Itinerary Screen

View, add or update a Field Visit on an officer's calendar on the Field Visit Itinerary screen. Access the Field Visit Itinerary screen by following the steps in the section above titled *View details for a calendar event on an officer's calendar.*

Follow the steps below to **View details about a Field Visit Itinerary:**

Step	Action
1	From the Field Visit screen, click the radio button beside the supervisee you want to review.
2	Click **View** at the bottom of the page.

Follow the steps below to **Reorder a field Visit Itinerary:**

Step	Action
1	From the Field Visit screen, click **Reorder Itinerary.**
2	Change any supervisee's orders that are needed. (i.e. 1 to 2 and 2 to 1 etc…)
3	Click **Save and Continue.**

Follow the steps below to **Print a field visit Itinerary:**

Step	Action
1	From the Field Visit screen, click **Print Itinerary**.
2	The print dialog box will display, click **Print**

Follow the steps below to **Print Field Report Form:**

Step	Action
1	From the Field Visit screen, click **Print Field Report**.
2	Click **Open** from the file open/save window.
3	Click the printer icon in the top left of the window.
4	Click **OK.** (A page will print for each supervisee on the itinerary.)

Follow the steps below to **Reschedule a field visit:**

Step	Action
1	From the Field Visit Itinerary screen, Click the hyperlink towards the top right of the screen labeled **Rescheduled Multiple Field Visits**.
2	Click the check box for each supervisee to be rescheduled.
3	Click **Reschedule.**
4	Enter the new date for the Field Visit and click **Next.**
5	Fill in all Itinerary fields. Click **Next.** Click **Finish.**

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Calendar, Continued

Field Visit Itinerary Screen (continued)

Follow the steps below to **Enter Results for a field visit:**

Step	Action
1	From the Field Visit screen, click on the radio button for the appropriate supervisee.
2	Click **Enter Results**
3	Fill in all required fields. ♦ **NOTE:** The Narrative is about the outcome and the Comments are about the field visit.
4	Click **Next.**
5	Click **Finish** or **Finish and Schedule Next** (To schedule next FV).

Other Events Screen

Update, Enter Results for, Reschedule or Delete an Other Event on an officer's calendar on the Other Events screen. Access the Other Events screen by following the steps in the section above titled *View details for a calendar event on an officer's calendar*.

Follow the steps below to **Update, Enter Results, Reschedule or Delete an other event on an officer's calendar:**

Step	Action
1	Follow the steps to View details for an Other Event on an officer's calendar.
2	From the Other events screen select the radio button for the event to be updated and select **Update, Enter Results or Reschedule** and continue to step 3. Or **To delete the event**, click on the EVENT NAME in the Event Type column and click **Delete** **NOTE:** Deleting an office visit on the officer's calendar will also delete the office visit from the supervisee's calendar.
3	Fill in all fields that are required or need updating.
4	Then click **Next** and **Finish** to progress through the screens until confirmation**.**

Process Adult Supervision Order (PASO)

Introduction

This training guide explains the JIMS2 functionality **Process Adult Supervision Order (PASO).**

This functionality allows authorized CSCD employees to:

- Create original supervision orders
- Create amended supervision orders

Create an original supervision order

Follow the steps below **to create a new supervision order:**

Step	Action
1	From the Caseload screen, click the blue tab labeled Process Orders.
2	From the Process Supervision Order Search page, select search by SPN number or case number and CDI.
3	Enter the SPN number or case number and CDI. **NOTE:** Valid CDIs are: 002=class A or B misdemeanor cases, 003=Felony cases.
4	Click **Submit.**
5	Click the radio button next to the appropriate case.
6	Click **Create Order.**
7	On the Prepare Order Presentation page, select Original for Version Type**.**
8	Fill in all required fields that are not already filled in. Required fields are denoted by the ◆.
9	Click **Next.** Select the suggested order template to be used by clicking the appropriate radio button. **NOTE:** There should be a suggested order template titled MAIN COCS which contains all the standard conditions for the court for which the current offense is assigned.
10	Click **Customize Suggested Order.**
11	**To add the non standards condition to this order:** Select the category SHOCK category from the **Group 1** drop down menu provided that would apply to your offense.

Process Adult Supervision Order (PASO), Continued

Create an original supervision order (continued)

Step	Action
14	Click **Submit.**
15	Select the check box next to HCJ – AS COCS ALCOHOL/DRUGS UA - RANDOM / MONTHLY REPORT IN PERSON – Felony or REPORT IN PERSON - MISD
16	Click **Add Selected.**
17	Click **Save and Continue.**
18	On the Set Details Page that displays, fill in all required fields.
19	Click **Save & Continue**.
20	On the Summary page verify that the changes are accurate.
21	Click **Save and Continue.**
22	On the Set Details Page that displays, all fields except the <<comments>> fields are required. Fill in all fields.
23	Click **Validate fields. If all required fields have not been filled in a message will alert you to make correction. If all fields have been filled in a message will display that condition detail successfully validated.**
24	Click OK.
25	Click **Save & Continue**.
26	On the Summary page verify that the changes are accurate.
27	Click **Finish**.
28	Click **Prepare to File.** The ***Process Supervision Order – Prepare to File*** screen displays.
29	On the Prepare to File screen, fill in all required fields.
30	Click **Next.**
31	Click **Finish**.
32	The amended order is now in **PENDING** status. Normally the assigned CLO will activate it. Because the order needs to be **Active** for other exercises in class today, please activate it yourself by completing the steps below.
33	Click **Activate Order.**
34	A message will display asking if you are sure you want to activate the order.
35	Click **OK. The message Supervision Order successfully activated. will display.**

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Program Referrals

Introduction

This training module explains Program Referrals in JIMS2.

Types of referrals

In JIMS2 the following types of referrals may be submitted for a supervisee:

- Automatic Program Referrals
- Program Referrals initiated by an authorized CSCD employee

Referral statuses

Referrals will exist in JIMS2 in the following statuses:

- **Initiated**
  Once a program referral is created in JIMS2 it is referred to as Initiated. Initiated referrals have a Referral Date only

  NOTE: The Referral has not yet begun so there is no T33 CSTS record.

- **Open (Submitted)**
  Once a program referral is open or submitted there is a Referral Date and a Begin Date only

  NOTE: The Referral has begun, a T33 CSTS record exists, and a begin date and reason for placement have been entered.

- **Exited**
  Once a If there is a Referral Date, a Begin Date, and an Exit Date -
  NOTE: The Referral is done - T33 & T34, an end date and reason for discharge have been entered.

Error Messages

When a program referral cannot be progressed through the system an error message will display. This may happen if the referral and provider type do not match or is an open referral of the same type already exists.

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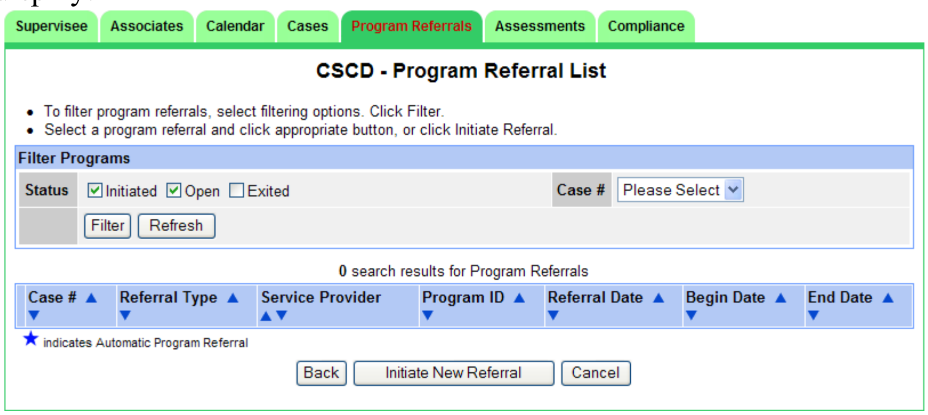
Program Referrals, Continued

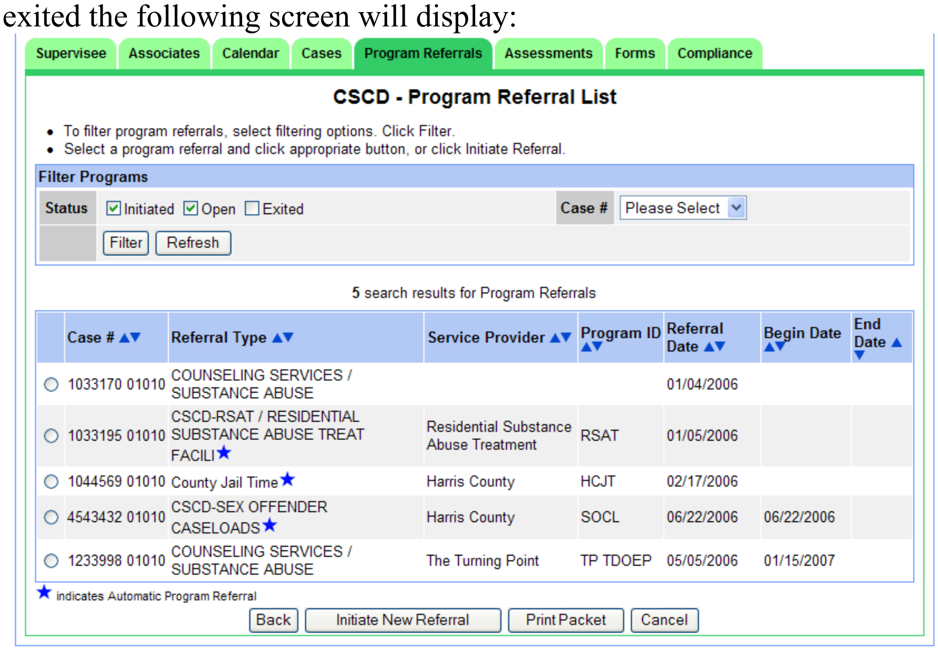
Sample Screens

The program referrals for a particular supervisee can be accessed by selecting the green Program Referrals tab off the Supervisee Details page.

If a supervisee has no current program referrals the following screen will display:



If a supervisee has program referrals that are initiated, submitted, and/or exited the following screen will display:



NOTE: Program referrals denoted with a ★ indicate an automatic referral has been generated in JIMS2 based on a supervisees active conditions of supervision.

Continued on next page

Program Referrals, Continued

View a Program Referral

Follow the steps below **to view a program referral:**

Step	Action
1	Access the Supervisee Details screen.
2	Click the green tab labeled **Program Referrals**.
3	Select the Radio button next to the Referral to be viewed.
4	Click **View.** **NOTE:** In filter programs section of the screen the status defaults to Initiated and Open. To view Closed referrals, change the status to Exited and click filter.

To Print a Program Referral

Follow the steps below **to print the referral appointment for the supervisee:**

Step	Action
1	Access the Supervisee Details screen.
6	Click the green tab labeled **Program Referrals**.
7	Select the Radio button next to the Referral for which you would like to print the appointment.
8	Click **Print Appt.**

Initiate a new program referral

Follow the steps below **to initiate a program referral.**

Step	Action
1	Access the Supervisee Details screen.
2	Click the green tab labeled **Program Referrals**.
3	Click **Initiate New Referral.**
4	Select the Radio button next to the appropriate case number.
5	Click **Next**.
6	Select the Referral Type(s) required and **Click Save and Continue.**
7	Select the check box next to each Service Providers to be provided in the supervisee's printed packet or click the top check box to select all providers. Remember the referral type listed in the Program Referral Information section must match the referral type for the Service Provider selected for the referral. **NOTE:** If a supervisee has special needs, i.e. is a Spanish Speaker, use the *Filter Service Providers* section to filter out the only the providers that meet those Special Needs.
8	Click **Print Packet**.

Continued on next page

Program Referrals, Continued

Update a program referral

Follow the steps below **to update a program referral if necessary and schedule an appointment date and time:**

Step	Action
1	Access the Supervisee Details screen.
2	Click the green tab labeled **Program Referrals**.
3	Select the Radio button next to the Referral to be updated.
4	Click **Update**. Select the radio button for the appropriate case.
5	Click **Next**.
6	Make any necessary changes to the Referral Types selected.
7	Click **Save and Continue**.
8	Select the Service Provider that will be used from the list provided.
9	Click **Next.**
10	Select the program location that will be used from the list provided.
11	Click **Schedule Date/Time** to continue and enter the appointment time and continue to step 12 OR Click **Next** if the appointment time is not yet known and continue to step 13.
12	Select Date and Time from the Drop-down menus provided.
13	Click **Next.**
14	Click **Finish.** The message **Program Referral successfully updated.** will display.

Submit a Program Referral

Follow the steps below **to submit (assign a program begin date) a program referral:**

Step	Action
1	Access the Supervisee Details screen.
2	Click the green tab labeled **Program Referrals**.
3	Select the radio button next to the referral to be submitted.
4	Click **Submit Referral.**
5	Fill in Date and select a Reason for Placement.
6	Click **Next.**
7	Click **Finish.**

NOTE: A Program referral cannot be submitted until the referral service provider and program location has been updated using the steps in the Update a program referral section above.

Continued on next page

Program Referrals, Continued

Program Re-Referral

Once the referral has a begin date you can do a re-referral.

Follow the steps below **to create a program re-referral:**

Step	Action
1	Access the Supervisee Details screen.
2	Click the green tab labeled **Program Referrals**.
3	Select the Radio button next to the Referral to be updated.
4	Click **Re-Referral**.
5	Select Date and Time from the Drop-down menus provided.
6	Enter Comments.
7	Click **Next.**
8	Click **Finish.** The message **Program Referral re-referral successful.** will display.

Remove entry from a Program Referral

The Remove Entry button will only display for referrals that have been submitted and, thus, have a begin date entered into the system.

Follow the steps below **to remove an entry from a Program Referral.**

Step	Action
1	Access the Supervisee Details screen.
2	Click the green tab labeled **Program Referrals**.
3	Select the Radio button next to the Referral to be updated.
4	Click the **Remove Entry.**
5	Click **Finish.** The message **Program Referral entry successfully removed.** will display.

Continued on next page

Program Referrals, Continued

Exit a program referral

Once a program referral is completed by the supervisee, the referral is exited. This will create a system generated casenote.

Follow the steps below **to exit a program referral**:

Step	Action
1	Access the Supervisee Details screen.
2	Click the green tab labeled **Program Referrals**.
3	Select the Radio button next to the Referral that is completed.
4	Click **Exit Referral.**
5	Enter the program end date and Select the Reason for Discharge from the drop-down menu provided.
6	Enter Comments.
7	Click **Next.**
8	Click **Finish.**
9	The message **Program Referral successfully exited.** will display.

Delete a Program Referral

Program Referrals that do not have a begin date may be deleted.

Follow the steps below **to delete a program referral:**

Step	Action
1	Access the Supervisee Details screen.
2	Click the green tab labeled **Program Referrals**.
3	Select the Radio button next to the Referral to be deleted.
4	Click Delete. The message **Casenotes may exist associated to this program referral that need to be deleted** will display.
5	Click **Finish** to continue deleting the referral. The message **Program Referral successfully deleted.** will display.

Compliance

Introduction

This training module explains how to monitor compliance for a supervisee. Compliance is monitored by setting specific conditions of supervision to noncompliant and then, if appropriate, resolving non-compliance for conditions once the issue is resolved. Conditions pertaining to reporting requirements and urinalysis will automatically populate a JIMS2 violation report when non-compliance is set.

About Compliance

A supervisee's conditions can be set to non-compliant as needed.

Once non-compliance conditions are addressed, the non-compliance condition can be resolved in JIMS2.

Once a non-compliant condition is resolved it can be included in the non-compliance count for that condition or the resolved, non-compliant condition can be decremented or removed from the non-compliance count for that condition.

Set condition(s) to non-compliant

Follow the steps below **to monitor compliance for a supervisee:**

Step	Action
1	Select Caseload from the left navigation tree. Select Search By SPN from the drop-down menu provided.
2	Enter the SPN number and click **Submit.**
3	Click on the supervisee's name. The Supervisee Details screen will display.
4	Click the green tab labeled **Compliance**.
5	Select the condition(s) to be set to non-compliant from the list of **Supervisee Conditions.** **NOTE:** The list of displayed **Supervisee Conditions** can be filtered filling in any combination of fields in the **Filter Conditions** section of the screen and clicking **Filter.**

Continued on next page

Compliance, Continued

Set condition(s) to non-compliant (continued)

Step	Action
6	Click **Set to Noncompliant.**
7	Fill in the **Occurrence Date** and **Occurrence Time** and select the **Event Type**. Include **Details** if applicable for each non-compliant condition. **NOTE:** The details you enter will populate the Violation report for certain conditions such as UA testing. For UA testing enter the substance tested positive for in the details field so that it will display on the violation report.
8	Click **Next.** The Casenote screen will display:
9	Fill in all required Casenote fields. All required fields are denoted by the symbol. **NOTE:** To select more than one Casenote Subject, select a subject and then hold down the control key to select additional subjects.
10	Click **Next.** The summary screen will display: **NOTE:** Click **Finish Casenote Later** to finish the non-compliant workflow and save the casenote as a draft that can be updated for up to 24 hours or click **Finish** to finish the non-compliant workflow and permanently save the casenote.
11	Click **Finish** to save the casenote and set the condition to non-compliant. Or Click **Finish Casenote Later** to set the condition to non-compliant and save the casenote in a draft status that can be edited later for up to 24 hours. The following confirmation screen will display with the message: **Condition(s) successfully set to Noncompliant.**

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Violation Report and Case Summary

Introduction

This module explains the functionality used to create and maintain violation reports and case summary reports in JIMS2.

Statuses

As a violation report or case summary progresses though JIMS2 it goes through various statuses including:

- DRAFT
- PENDING MANAGER APPROVAL
- FILED

Data on the violation report and case summary

The violation report and case summary consist of several sections. Within each section data can be either viewed or updated by clicking the view or Update link for the section. When creating a new violation, report some data may already exist for a particular section based on the following source data that will populate the violation report automatically when it is entered.

Type of Violation	**Source**	Detail
Law violations	Model 204 – CAS 15.10	Generate new case for SPN
Fee history	CICS - LCBT or LCBU	Use LCBT to create or LCBU to update a cost bill. In the PAYABLE ON OR BEFORE field on page 3 of the record, enter a date in the past so that fees will be delinquent.
Reporting History	JIMS2 - Compliance tab	Access Compliance, inquire on Group 1 = Reporting, select the case number and click Filter. Set condition to non-compliant. (Add reporting conditions to order first if needed.)

Continued on next page

Violation Report and Case Summary, Continued

Data on the violation report and case summary (continued)

Type of Violation	Source	Detail
Employment History	Model 204 - PTY 60	Enter employment record
Previous Court activity – Violation Reports	JIMS2 - Cases tab	Create a Violation Report or Case Summary Report for the case and submit for approval. Sign on as supervisor > View Tasklist > Approve. Assign J2QA8 to the CLO position in the court or create a report submission task for a CLO such as J2Q19. Sign on as the CLO > View Tasklist > Submit and Self Approve. Access report > Maintain > File. Then create a new report for the same case.
Previous Court Activity – Motions & Other	None	Entered manually at this point. Manually entered Motion and Other info is not displaying on subsequent reports for the same case.
Treatment Issues	JIMS2 - Program Referrals tab	Initiate, open and/or exit a program referral for the case in the report

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Violation Report and Case Summary, Continued

Data on the violation report and case summary (continued)

Type of Violation	Source	Detail
Community Service	Model 204 - CSR 45	Post hours supervisee worked for a case. To find records already set up in CSR, access CSR 53 and inquire on a name. Use the CDI/Case to create an order in JIMS2.
Positive Urinalysis	JIMS2 - Compliance tab	Supervisee must have order with condition associated to Event Type Positive UA or Positive UA - Non-Prescribed RX. Enter non-compliance on the condition. Easier to test in PT where condition data was copied from Production. Ex. in PT 02371622 (access through Caseload).
Recommendations	JIMS2	Add recommendations to violation report or case summary report.
Court Actions	JIMS2 - File Violation Report page	When report is Filed, select Maintain, select File/Court Actions. Note: can create submission task for CLO if can't log on as the CLO in the court.

Continued on next page

Violation Report and Case Summary, Continued

View a violation report or case summary

Follow the steps below **to view a supervisee's violation report(s).**

Step	Action
1	Access the **Supervisee Details** screen.
2	Click the green tab labeled Cases.
3	Select the radio button next to the appropriate case.
4	Click **Violation Reports** or **Case Summary List.**
5	Select the radio button next to the case on the violation Reports List screen.
6	Click **View**.

Create a DRAFT violation report or case summary

Follow the steps below **to create a violation report:**

Step	Action
1	Access the **Supervisee Details** screen.
2	Click the green tab labeled Cases.
3	Select the radio button next to the case on the Case History screen and click **Violation Reports** or **Case Summary List.**
4	Click **Create Violation Report** or **Create Case Summary**.
5	For each section of the report: 1. Click the Update link. 2. Click the Add button if one displays for that section. Some sections do not display an Add button. 3. Fill in all required and known fields. 4. Click **Next.** 5. Click **Finish.** A confirmation will display when each section is updated. Once at least one section of the report is updated, the Violation report or Case Summary is saved in JIMS2 as a DRAFT. **Remember,** some sections of the violation report may already be populated with data imported from other sources, but this data still has to be updated by you in order for it to be saved to the report. For example, if you click the Update link for Fee history, and a fee history violation is listed, you must click **Next** and then **Finish** to add that information to the draft report. **To remove a violation from a section of the report,** Select the check box next to the violation and click **Remove Selected.** Then click **Next** and **Finish** to progress through the screens.

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Violation Report and Case Summary, Continued

Submit a draft violation report or case summary for approval

Follow the steps below **to submit a DRAFT violation report for approval:**

Step	Action
1	Access the **Supervisee Details** screen.
2	Click the green tab labeled Cases.
3	Select the radio button next to the appropriate case on the Case History screen
4	Click **Violation Reports** or **Case Summary List.**
5	Click **Create Violation Report** or **Create Case Summary.**
6	Click the radio button next to the DRAFT violation report to be submitted.
7	Click **Update.**
8	Click **Submit for Approval.** The message **Violation Report successfully submitted for approval.** Will display. **NOTE:** The violation report will now display on the violation reports list screen in the status PENDING MANAGER APPROVAL and can no longer be changed by the submitter.
9	Once the report is approved, the status will change to FILED.

Delete a Violation Report

Follow the steps below **to delete a violation report:**

Step	Action
1	Access the **Supervisee Details** screen.
2	Click **View Profile**.
3	Click the green tab labeled Cases.
4	Select the radio button next to the appropriate case on the Case History screen.
5	Click **Violation Reports** or **Case Summary List.**
6	Select the radio button next to the appropriate case on the List screen. **NOTE:** Only violation reports with a status of DRAFT or PENDING MANAGER APPROVAL can be deleted.
7	Click **Delete.** A confirmation message will display that the report has been deleted.

Continued on next page

Violation Report and Case Summary, Continued

Print a Violation Report or case summary

Follow the steps below **to print a violation report:**

Step	Action
1	Access the **Supervisee Details** screen.
3	Click the green tab labeled Cases.
4	Select the radio button next to the appropriate case.
5	Click **Violation Reports.**
6	Select the radio button next to violation report to be printed. **NOTE:** A violation report can be printed in any status including DRAFT, PENDING MANAGER APPROVAL and FILED.
7	Click **View**.
8	Click **Print.**

Tasks/Assignment

Introduction

This training module explains the JIMS2 functionality Tasks/Assignments.

The task functionality allows authorized CSCD employees to manage business activities such as report approvals and case assignments through an automated notification process.

Tasks are generated during the course of different types of JIMS2 system activities including:

- The creation of new supervision orders
- The submission of violation reports for approval
- Case reassignment requests

User Tasklist

Tasks submitted to a specific users will show up on that user's Tasklist.

Tasks submitted to a workgroup will show up on the Tasklist for all users authorized to view tasks for that workgroup.

Workgroups will be set up by the data services division.

Examples of workgroups would be Court services Intake or the court team that an officer is assigned to.

View Tasklist

The Task Search screen displays all the submitted and accepted tasks currently on the ACTION LIST of the logged in user.

This screen also allows authorized users to search for tasks that have been sent to organized WORKGROUPS to which they are assigned.

To **view your current Tasklist in JIMS2** follow the steps below:

Step	Action
1	Click the the blue tab labeled Tasks from the Caseload screen.
2	The current ACTION LIST for the logged in user will display.

Continued on next page

Tasks/Assignment, Continued

View Tasklist (continued)

To **view the current Tasklist for a workgroup in JIMS2** follow the steps below:

Step	Action
1	Click the blue tab labeled Tasks on the Caseload screen.
2	Change the Tasklist Type to WORKGROUP using the drop-down menu provided.
3	Click on a displayed workgroup name. **NOTE:** Only Workgroups to which you are assigned will display. Contact your data services division to be assigned to a workgroup if it does not display in the list of Workgroup selections.
4	Click **Submit.** The current ACTION LIST for that workgroup will display.

Tasklist screen Functionality

The following functionality is available from the Tasklist screen.

- Change the Tasklist Type field to Workgroup to search for Tasks assigned to a JIMS2 CSCD workgroup to which you are assigned.
- Click **Advanced search** to search for tasks using additional search criteria. For example, you may want to search for CLOSED tasks or tasks submitted to you on a specific date.
- Click a listed supervisee’s name to transfer to the Supervisee Details screen for that supervisee.

Task Statuses

Tasks go through various statuses as users perform functions in JIMS2.

Task statuses include:

- **Submitted** — New tasks display on a user’s tasklist in this status.
- **Accepted** — Tasks display on a user’s tasklist in this status once a user selects the task and clicks **Accept.**
- **Closed** — Tasks become closed once a user completes the workflow for an accepted task. Once a task is in closed status it no longer displays on a user’s action list. To view a closed task, click the **Advanced Search** link on the task search screen and inquire on the status CLOSED.

Continued on next page

Tasks/Assignment, Continued

Assignment

The case assignment process can be handled in two ways in JIMS2:

- By system generated tasks that alert users that the reassignment needs to take place. For example, when a new supervision order is created.

  OR

- By an authorized user selecting a case to be reassigned and clicking the **Reassign** button on the Caseload screen.

Manual Reassign

The manual Reassign feature is only available for supervisory level employees or users assigned to specific workgroups responsible for reassigning cases.

Follow the steps below **to manually reassign a case in JIMS2:**

Step	Action
1	Access the caseload screen and search for the supervisee by SPN.
2	View the cases for a listed supervisee by clicking the + sign next to their name.
3	Select the check box next to the case to be reassigned to the CLO.
4	Click **Reassign.**
5	Click **Paper File Received.**
6	Select the reassignment type.
7	Click **Next.**
8	Progress through the reassignment screens making the appropriate selections.
9	Click **Finish**. A task will be sent to the appropriate authorized user for approval.

Continued on next page

Tasks/Assignment, Continued

Reassignment to CLO

Users with the CSO role will can only request reassignment of a case back to the CLO and will not have the manual reassign function explained above.

Follow the steps below **to Request Reassignment to CLO:**

Step	Action
1	Access the caseload screen and search for the supervisee by SPN
2	View the cases for a listed supervisee by clicking the + sign next to their name.
3	Select the check box next to the case to be reassigned to the CLO.
4	Click **Request Reassignment to CLO.**
5	Click **Next.**
6	Click **Finish**. A task will be sent to the appropriate authorized user for approval.

Task submitted for violation report approval

When a draft violation report is submitted for approval:

1. The supervisor for the submitting officer will receive a task and can either approve the report or return it to the officer for changes.

2. If the report is returned to the officer for changes, the officer will receive a task back on their task list alerting them that changes to the report have been requested.

Follow the steps below **to accept a task submitted to you for a violation report approval: (NOTE:** This is a supervisory function only.)

Step	Action
1	View your tasklist.
2	Select the radio button next to the task for New Violation Report for approval.
3	Click **Accept.**
4	Click **Next.**
5	Review all sections of the violation report.
6	Click **Approve** or **Change Request.**

Continued on next page

Tasks/Assignment, Continued

Task submitted for new supervision orders

When a new supervision order is created, a task is generated and sent to court services intake to begin the case assignment process.

The following list shows the workgroups and or users roles that will receive tasks in the new case assignment process:

1. Court Services Intake
2. Region Intake
3. Region/program supervisor
4. Officer

Close task

Tasks are closed once an authorized user accepts the task and completes the workflow for their job function.

The manual process of closing a task is a data control function only.

Casenotes

Introduction

A casenote is a chronological ("chrono") documentation of all activities associated with the supervisee's behavior and compliance with court orders. Casenotes are either system-generated, as in the case of an order modification and supervision assignment, or they are created by the user to document a next action, such as a court-ordered directive. The "Casenote Journal" is a list of all existing casenotes.

Casenotes can be created in the context of the:

- Supervisee
- Condition of Community Supervision
- Supervision Order

Casenotes are also created to track the assignment/reassignment of the supervisee to a Program Unit and Community Supervision Officer.

View Casenote Basic Search

Follow the steps below **to view casenotes:**

Step	Action
1	Access the Casenotes Search page: a. In the left navigation tree, expand **CSCD** by clicking the plus sign (+) beside it. b. Expand **Casenotes** by clicking the plus sign (+) beside it. c. Click the **Casenotes** link.
2	For the basic search you can search by either SPN, Name or CDI and Case Number. **NOTE: Supervision Period** is a required field that defaults to the active period. Casenotes created in a previous supervision period can be viewed by selecting "Previous."
3	Click the **Submit** button.
4	View the Casenotes List page.
5	Note the following data in the **Supervisee Information** section: • Supervisee Name with a color-coded icon • to indicate the supervisee's compliance status (red = non-compliant; green = compliant). The indicator will display red if the supervisee has at least one non-compliant condition. • Supervisee's SPN, date of birth, race and gender. • Supervising Officer name and Unit information will display in the future. • Next Contact Date, Contact Method and Contact Reason will show event information in a future release of the application.

Continued on next page

Casenotes, Continued

View Casenote Basic Search (continued)

Step	Action
6	The list of all casenotes created for the supervisee can be filtered using the Search Casenotes section of the page. • In the Search Casenotes section of the page, click the **Search By** drop-down list. Select each one of the listings and notice that specific search fields display for each listing. • Select to Search By: **Casenote Type**, then select **Supervision**. Click the **Search** button. • Notice that the list of casenotes is now filtered to only casenotes of the selected type. • Click the **View All** button to return to the Casenote Journal.
7	In the top right of the Supervisee Information section of the **Casenotes List** screen, click: • The **View Cases** link to view all cases with active supervision orders for this supervisee. Click **Hide Cases** to hide the displayed cases. • The **View Employment** link to view all employment for the supervisee. Click the **View Employment** link to view the supervisee's current employment information. In the future the Update Employment link will be active so that you can update information from here. • The **View Address** link to view all address for the supervisee. Click the **View Address** link to view the supervisee's current address information. In the future the Update Address link will be active so that you can update information from here. Click **Hide Address**.

View Casenote – Advanced Search

Follow the steps below **to do an Advanced Search of Casenotes:**

Step	Action
1	Click the **Casenotes** link in the left navigation tree under CSCD.
2	Click the **Advanced Supervisee Search** link.
3	The Advanced Search page is divided into four search sections. Enter full or partial information into one or more sections. Required fields are marked with this symbol: ♦.
4	Click **Submit**.

Continued on next page

Casenotes, Continued

Create Casenote and Add Associate

Follow the steps below **to create a new Casenote and add an associate to the Casenote:**

Step	Action
1	Click the **Casenotes** link in the left navigation tree under CSCD**.**
2	Enter the SPN. Select the radio button for active or previous supervision period.
3	Click the **Create Casenote** button in the Search Casenotes section of the Casenotes List page. **NOTE:** Casenotes that display in yellow are DRAFTS and can still be edited or deleted. Casenotes that display in red concern non-compliance issues. To edit a DRAFT case note click the **Edit** link. To delete a DRAFT casenote click the **Delete** link.
4	Complete the casenote with the following information -- Casenote Date/Time: Use default date/time Contact Method: Phone Casenote Subject: Correspondence Collateral: Associates
5	Click the **Add Associate** link, and add the following associate information -- Name: Anderson, Rebe Relationship: Other Relative Address: click the link labeled **Copy Supervisee's Residence Address**
6	Click **Next** from the **Create Associate** page.
7	On the Summary page check the record for accuracy, then click **Finish.**
8	On the Casenotes List page click the associate's name to highlight it.
9	In the **Casenote** field type a note such as: Verified that supervisee resides with this associate.
10	Notice that you can format the casenote with various fonts, font sizes and features, and that you can spell-check the casenote. **NOTE:** If you click the button labeled **Save as Draft**, you can finish the casenote for up to 24 hours. Click **Finish** to save the casenote.