



AutoMon Involvement Management System AIMS

APPLICATION TRAINING GUIDE

(Updated January 15, 2019)

OVERVIEW

AutoMon Involvement Management System (AIMS) is a case and data management system that provides Specialty/Treatment Courts a comprehensive management application for managing all relevant tasks associated with Specialty/Treatment Courts, from referral through termination/graduation. Data captured in the system is made available to users for detailed data analysis and reporting while granular level permissions and role management functionality is provided to designated System Administrators. Hosted on Microsoft Azure Government, AIMS meets CJIS, HIPAA and U.S. Federal Government standards for storing and protecting sensitive data.

CORE FEATURES

- Ability to manage multiple different involvements for an individual Client's referred to and enrolled in Drug, DUI, Mental Health, and Veterans Court
- Alerts for Failure to Report, Failed Drug and/or Alcohol Tests, etc.
- Ability to notify Defendants of upcoming hearings, contact requirements, and drug tests via Text messaging as well as SMS Chat Messaging functionality for additional communications with Clients
- Comprehensive Document assembly and management
- Phase milestone and promotion management
- Sanction & Incentives schedules
- Ability to manage and record curfew checks
- Ability to record treatment/class session requirements as well as record treatment/class attendance.
- Drug/Alcohol Testing Randomization and scheduling
- Comprehensive Permissions and Role Management

AIMS is browser agnostic and supports a wide range of modern browsers.

Supported Browsers include: Edge, Safari, Firefox and Google Chrome.



1. [Logging In](#)
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7. [Hearings](#)
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26. [Administration](#)
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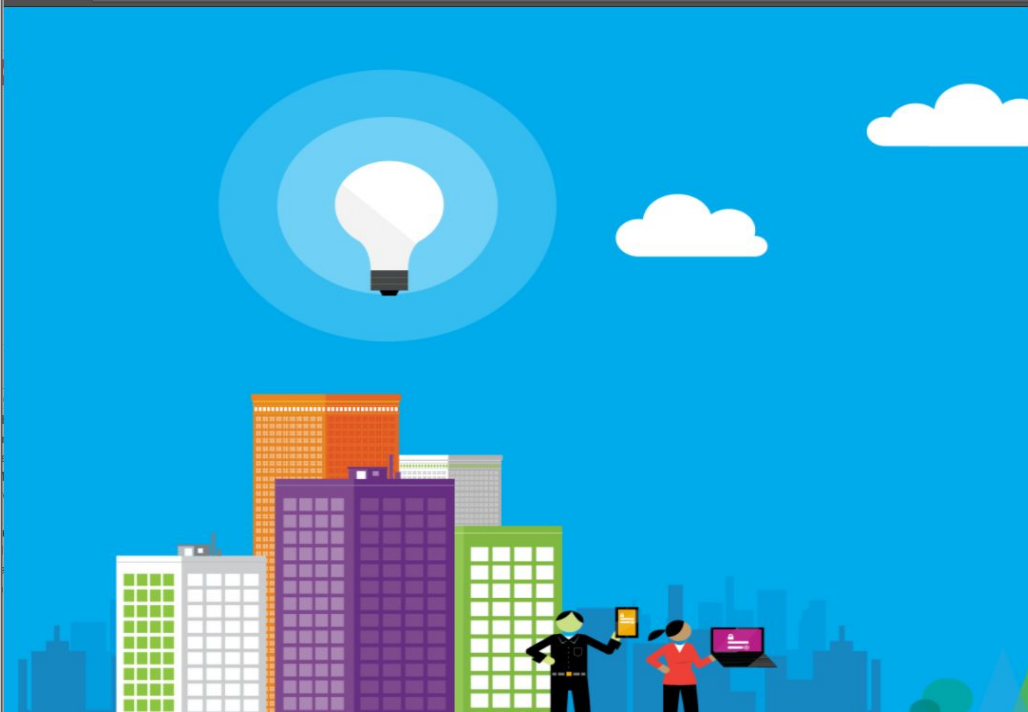
Subtopics:

1. Create your account
2. Resetting your password
3. Navigating to AIMS



STEPS

To create your account:

1. Ensure AutoMon has added your First and Last name and email address to the user setup within AIMS.
2. In your browser's URL address, type your tenant AIMS web address.
3. Click on the 'Sign up now' hyperlink.
4. Complete the account setup process.



Sign in with your social account

 Microsoft  Google

OR


Sign in with your existing account

Email Address

Password [Forgot your password?](#)

[Sign in](#)

Don't have an account? [Sign up now](#)



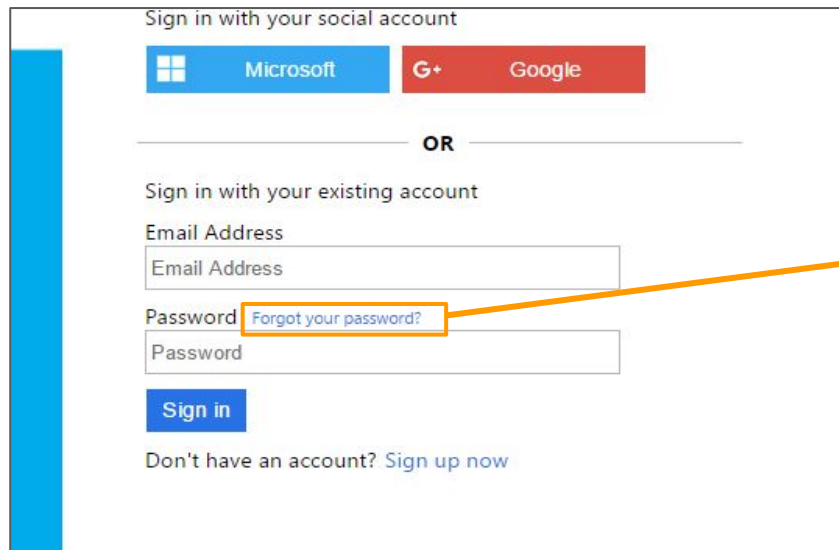
RESETTING YOUR PASSWORD

If at anytime a User forgets their password or wishes to reset it, follow the steps below:



STEPS

To reset your AIMS Password:

1. Go to your tenant AIMS web address and select “Forgot Password”
2. Enter your email address that is associated with AIMS. Microsoft will send that email address a verification code that you will need to complete the ‘forgot password’ process.



Sign in with your social account

 Microsoft  Google

OR

Sign in with your existing account

Email Address

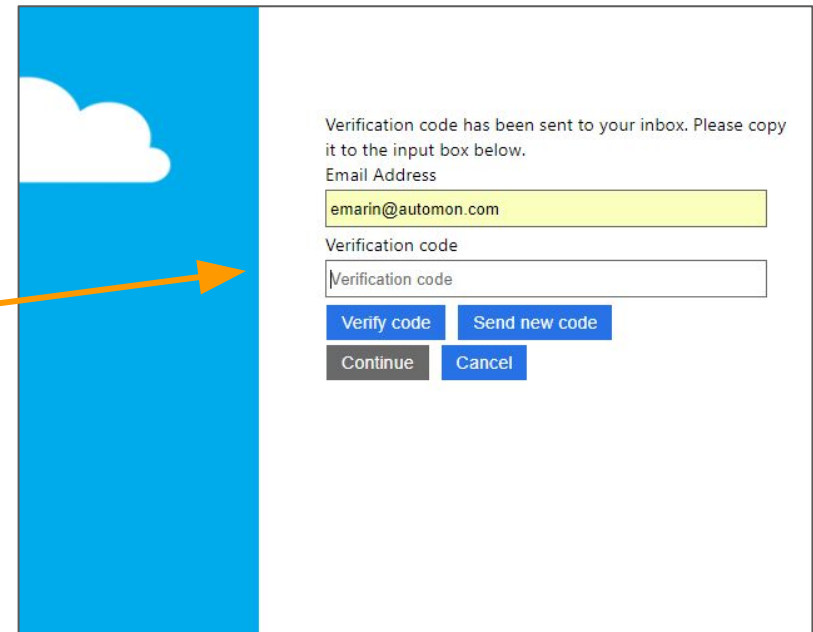
Email Address

Password [Forgot your password?](#)

Password

[Sign in](#)

Don't have an account? [Sign up now](#)



Verification code has been sent to your inbox. Please copy it to the input box below.

Email Address

emarin@automon.com

Verification code

Verification code

[Verify code](#) [Send new code](#)

[Continue](#) [Cancel](#)

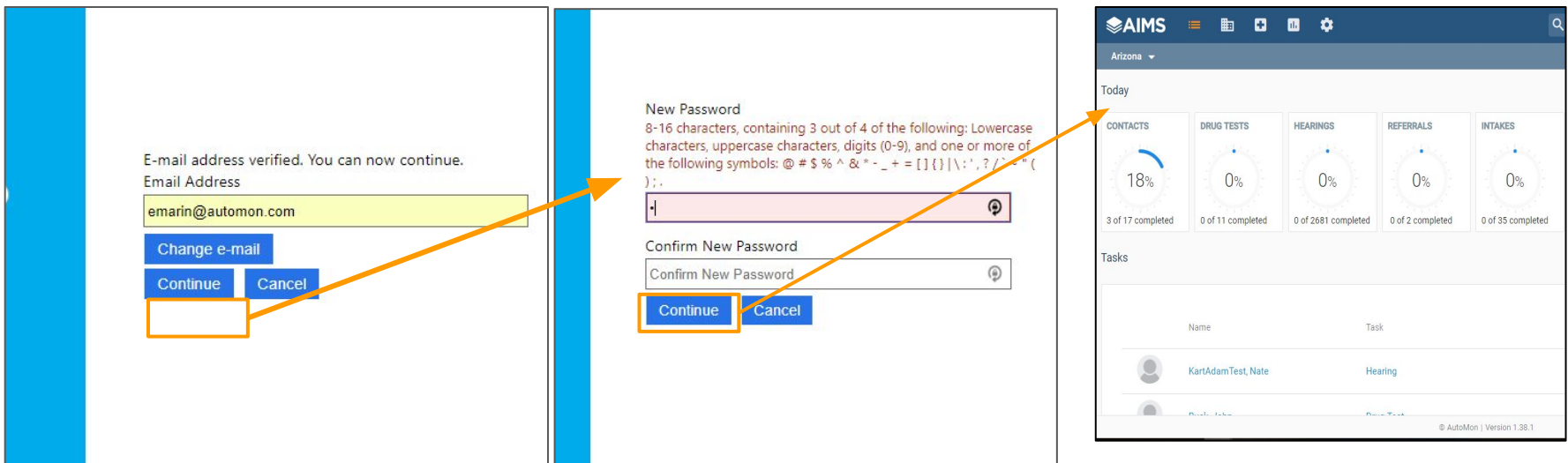
RESETTING YOUR PASSWORD (CONT'D)

If at anytime a User forgets their password or wishes to reset it, follow the steps below:

STEPS

To reset your AIMS Password:

3. Once your email address has been verified, click on the continue button.
4. Enter your new password and click on the continue button. Ensure your password meets Microsoft's password complexity requirements highlighted in red.
5. You will be routed to the AIMS home page.



The image displays three screenshots illustrating the password reset process in the AIMS system.

First Screenshot: Shows the "E-mail address verified. You can now continue." message. The email address "emarin@automon.com" is entered. Below the input field are buttons for "Change e-mail", "Continue", and "Cancel". An orange box highlights the "Continue" button, with an orange arrow pointing to the next screenshot.

Second Screenshot: Shows the "New Password" field with a red error message: "8-16 characters, containing 3 out of 4 of the following: Lowercase characters, uppercase characters, digits (0-9), and one or more of the following symbols: @ # \$ % ^ & * - _ + = [] { } | \ : ' , ? / > < " () ; .". Below this is the "Confirm New Password" field. Both fields have an orange box around the "Continue" button, with an orange arrow pointing to the third screenshot.

Third Screenshot: Shows the AIMS home page. The top navigation bar includes the AIMS logo, a dropdown menu for "Arizona", and icons for home, calendar, contacts, tasks, and settings. The main content area displays "Today" with five progress indicators: CONTACTS (18%, 3 of 17 completed), DRUG TESTS (0%, 0 of 11 completed), HEARINGS (0%, 0 of 2681 completed), REFERRALS (0%, 0 of 2 completed), and INTAKES (0%, 0 of 35 completed). Below this is a "Tasks" section with a table showing tasks for "KartAdamTest, Nate" and "Hearing". The footer indicates "© AutoMon | Version 1.38.1".

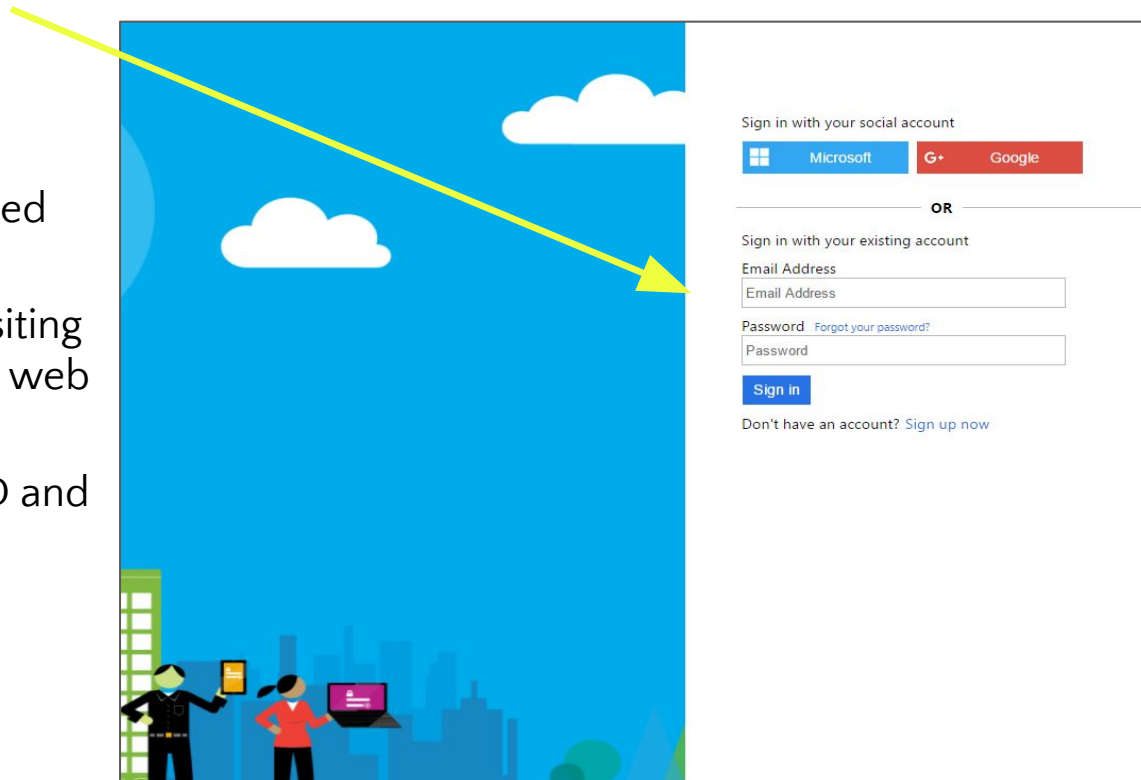
STEPS

To access AIMS:

1. Go to your tenant AIMS web address.
2. Sign in using your user ID (your email address) and password.

ACTIVITY

1. Launch a supported browser.
2. Go to AIMS by visiting your tenant AIMS web address.
3. Enter your user ID and Password.
4. Select “Sign in”



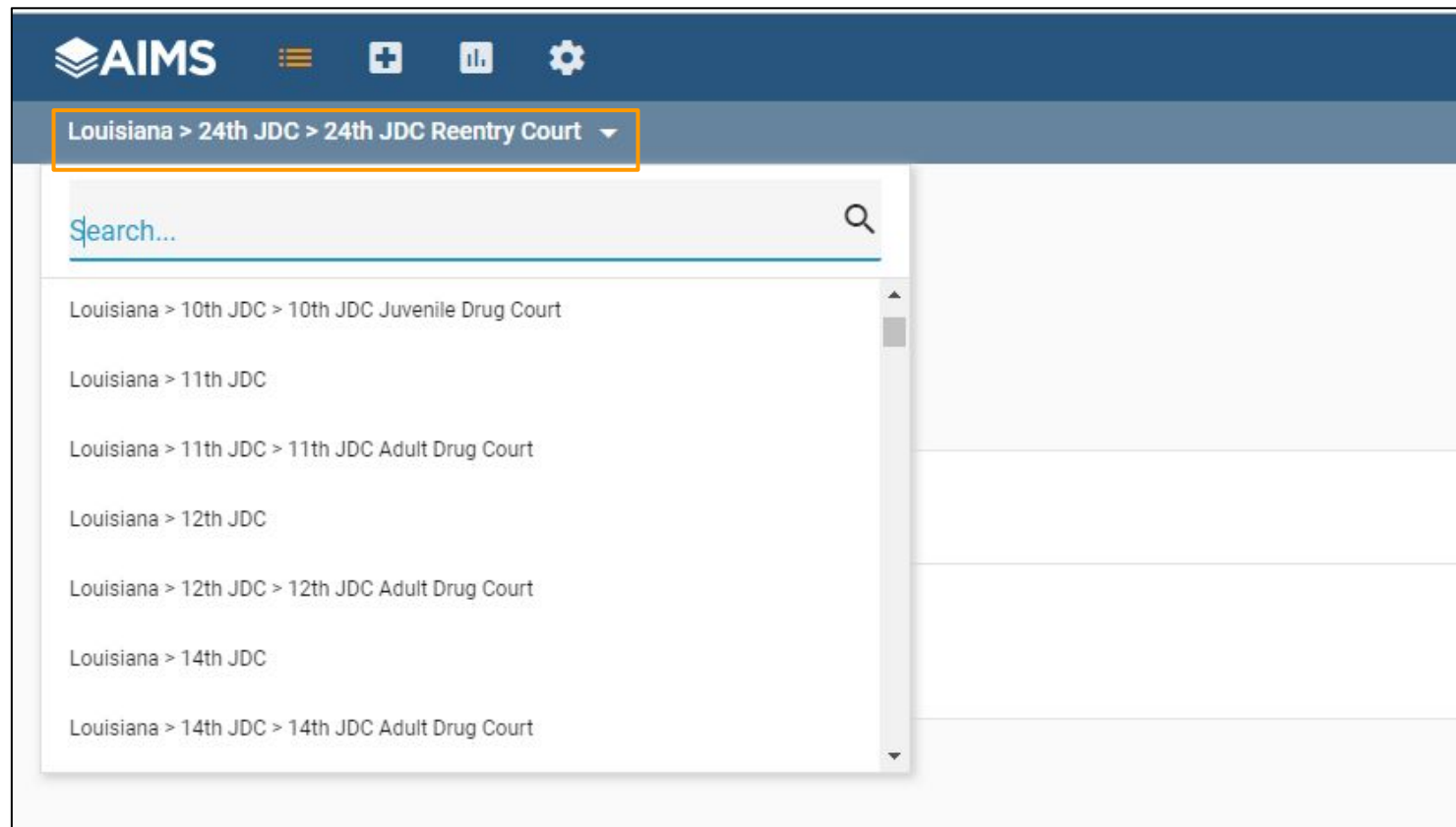
Subtopics

1. Location Security
2. Navigation Icons
3. Search
4. Favorites
5. SMS Messaging
6. Notification Preferences
7. Help
8. User Menu

MASTER HEADER - SECURITY LOCATIONS

When Users first login to AIMS, users will land on the **Agenda** screen by default. AIMS has 5 navigation tabs located on the top left corner of the screen. AIMS supports the ability for the system to return users back to the same icon and filter users a user was working in during your last session.

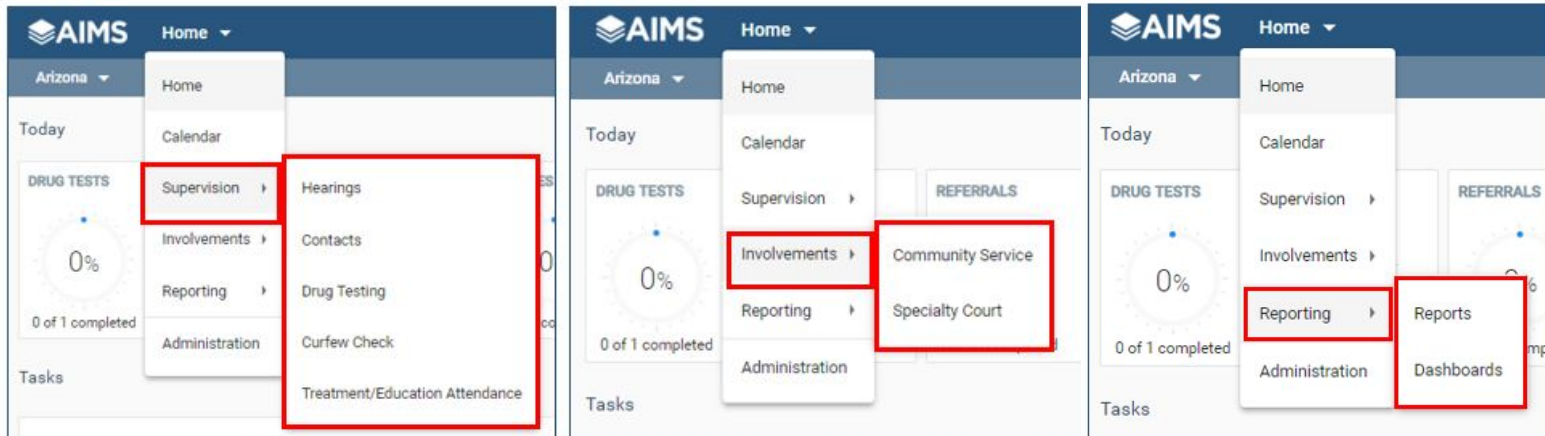
Security Location - AIMS supports security locations. Each user is configured for a specific security location(s). This allows the user to only see data from security locations they have permissions to, as well as create new data for those same locations.



MASTER HEADER - NAVIGATION ICONS

The AIMS Master header provides access to all aspects of the application, including:

1. **Calendar**
2. **Supervision** – Selecting Supervision displays a drop-down menu that includes an **Hearings, Contacts, Drug Testing, Curfew Check** and **Treatment/Education Attendance** tabs.
3. **Involvements** – Provides access to either Community Service and/or Specialty Court Involvement main pages.
4. **Reporting** – Reporting will display a drop-down menu that includes both **Dashboard** and **Reports**.
5. **System Administration** – System Administration will open the System Admin page to set up Users & Permissions, Compliance Settings, Configuration Settings, Drug Testing Settings, Hearing Settings, and Specialty Court Settings.



MASTER HEADER - NAVIGATION ICONS

Users with permission will have the ability to upload location-specific documents. These documents will not be specific to the Client but the security location instead. Users with permissions will have the ability to upload, edit the title and description, or delete the document.

State of Louisiana > 11th JDC > Sabine > ADC

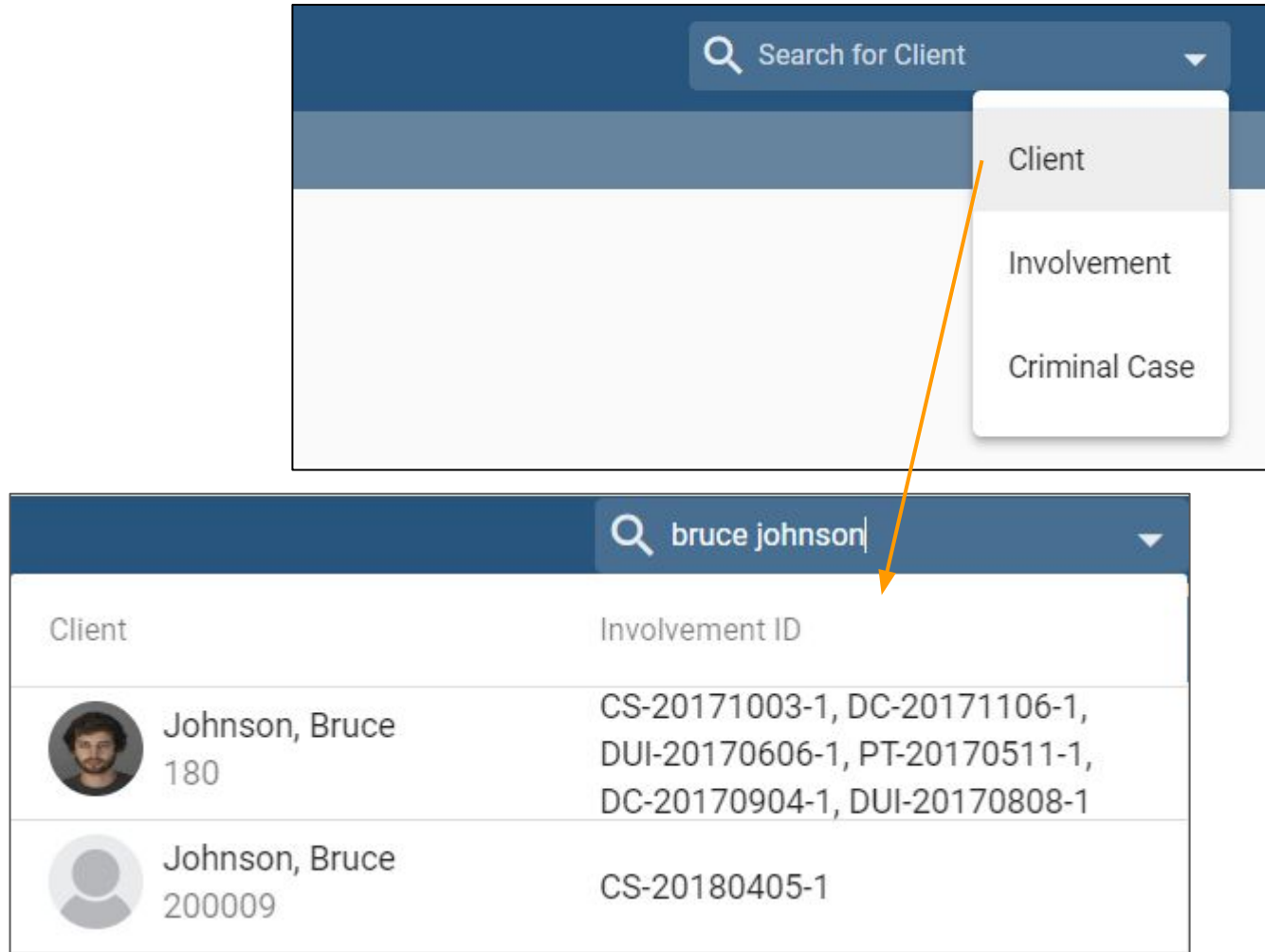
Documents

ADD DOCUMENT



<div><input type="checkbox"/></div>	Title <div>↓</div>	Descriptions	File Name	File Type	File Size	Added Date	Added By
<div><input type="checkbox"/></div>	Client Contract	Phoenix Drug Court Client Intake Contract	Contract.pdf	Portable Document Format	971 KB	02/04/2018	Jon Doe
<div><input type="checkbox"/></div>	Phoenix Drug Court Policies Manual		PHXPolicies.pdf	Portable Document Format	184 KB	04/12/2018	Jon Doe

MASTER HEADER - SEARCH

The **Search** bar allows Users to search for all Clients in the system by Client (Name and ID number), Involvement number, or Criminal case number.

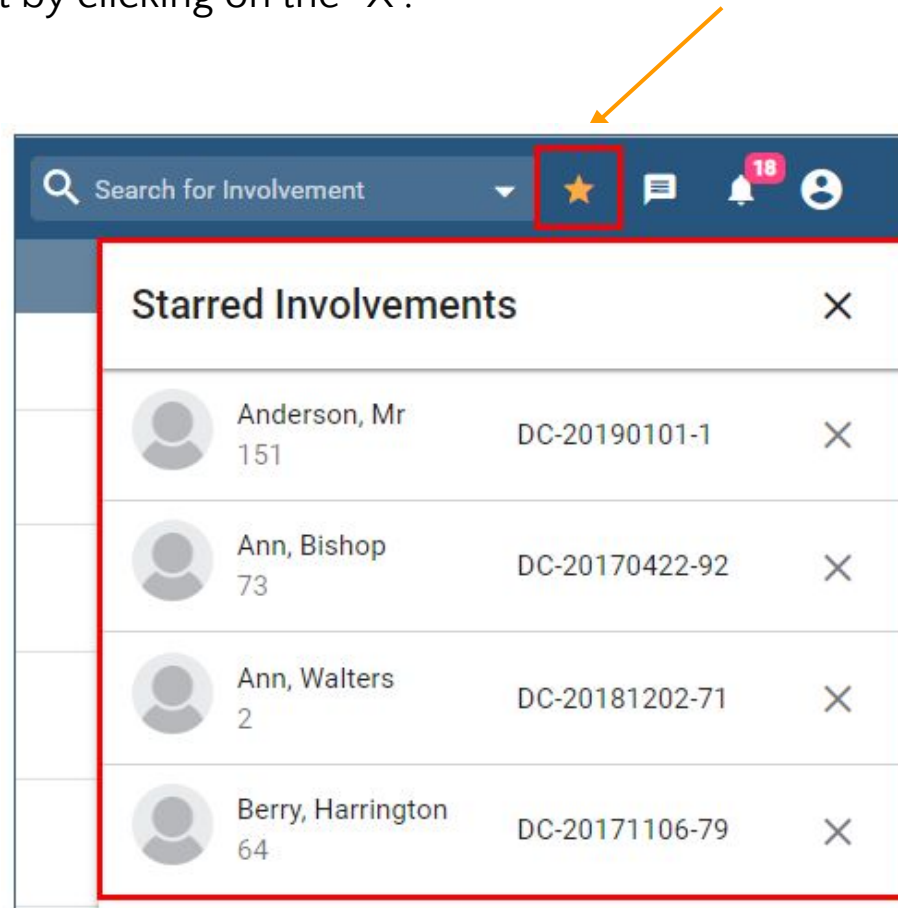


The screenshot displays the search functionality of the AutoMon system. At the top, a search bar labeled "Search for Client" is shown with a dropdown menu open, listing "Client", "Involvement", and "Criminal Case". Below this, the search results for "bruce johnson" are displayed in a table. An orange arrow points from the "Client" option in the dropdown menu to the first row of the search results table.

Client	Involvement ID
 Johnson, Bruce 180	CS-20171003-1, DC-20171106-1, DUI-20170606-1, PT-20170511-1, DC-20170904-1, DUI-20170808-1
 Johnson, Bruce 200009	CS-20180405-1

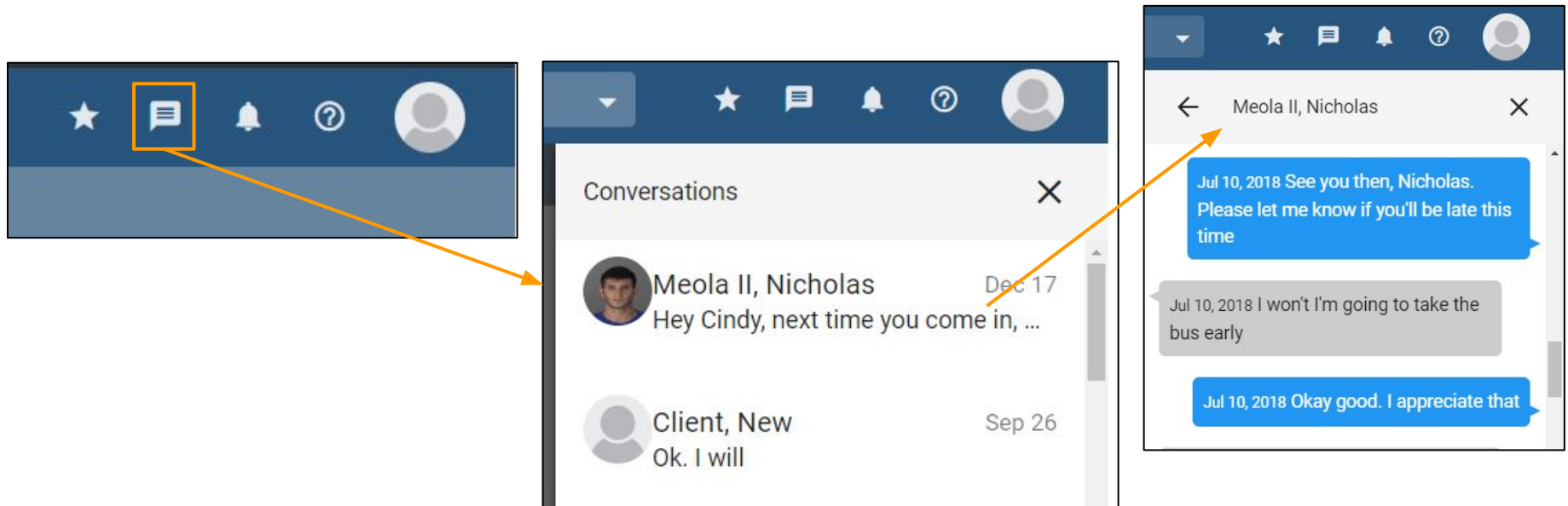
MASTER HEADER - STARRED INVOLVEMENTS

The **Starred Involvements** icon displays a list of Clients that have been added to the Starred Involvements list for quick-access. This functionality is useful for Users to quickly navigate to a Client's record who they frequently access. Clients can easily be added or removed from the Starred Involvements list by clicking on the "X".



MASTER HEADER - SMS MESSAGING

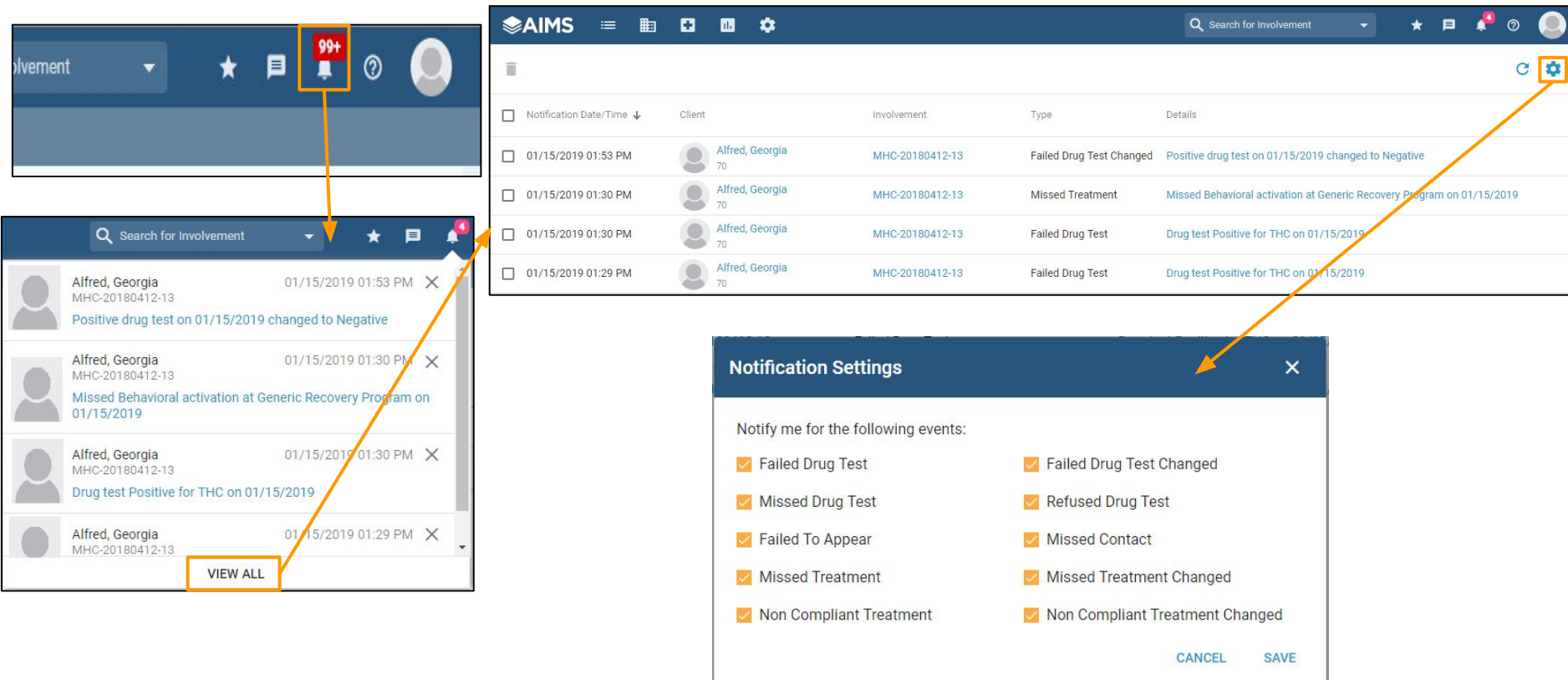
The **SMS Messaging** icon allows Users to view recent text messages exchanged between Users and Clients. Users can click on the Client's name to view all of the messages between the User and that Client.



Text Messages sent to a Client are sent from a number with the specific area code of the Court's geographic location. The same number is utilized to send Text message reminders to Clients for scheduled Check-ins, Court dates and drug/alcohol testing selection at pre-defined frequencies.

MASTER HEADER - NOTIFICATION

The **Notification** icon will display all of the User's recent alerts. Users can filter the type of results they wish to be notified of by selecting those options in **Notification Settings**.



The screenshot illustrates the notification workflow in the AutoMon system. It shows the main header with the notification icon (a bell with a red '99+' badge) and the 'Notification Settings' gear icon. Below the header, a list of notifications is displayed, each with a user profile, a timestamp, and a description of the event. The 'VIEW ALL' button is highlighted. The 'Notification Settings' dialog is shown, allowing users to select or deselect various event types for notifications.

Notification Date/Time	Client	Involvement	Type	Details
01/15/2019 01:53 PM	Alfred, Georgia 70	MHC-20180412-13	Failed Drug Test Changed	Positive drug test on 01/15/2019 changed to Negative
01/15/2019 01:30 PM	Alfred, Georgia 70	MHC-20180412-13	Missed Treatment	Missed Behavioral activation at Generic Recovery Program on 01/15/2019
01/15/2019 01:30 PM	Alfred, Georgia 70	MHC-20180412-13	Failed Drug Test	Drug test Positive for THC on 01/15/2019
01/15/2019 01:29 PM	Alfred, Georgia 70	MHC-20180412-13	Failed Drug Test	Drug test Positive for THC on 01/15/2019

Notification Settings

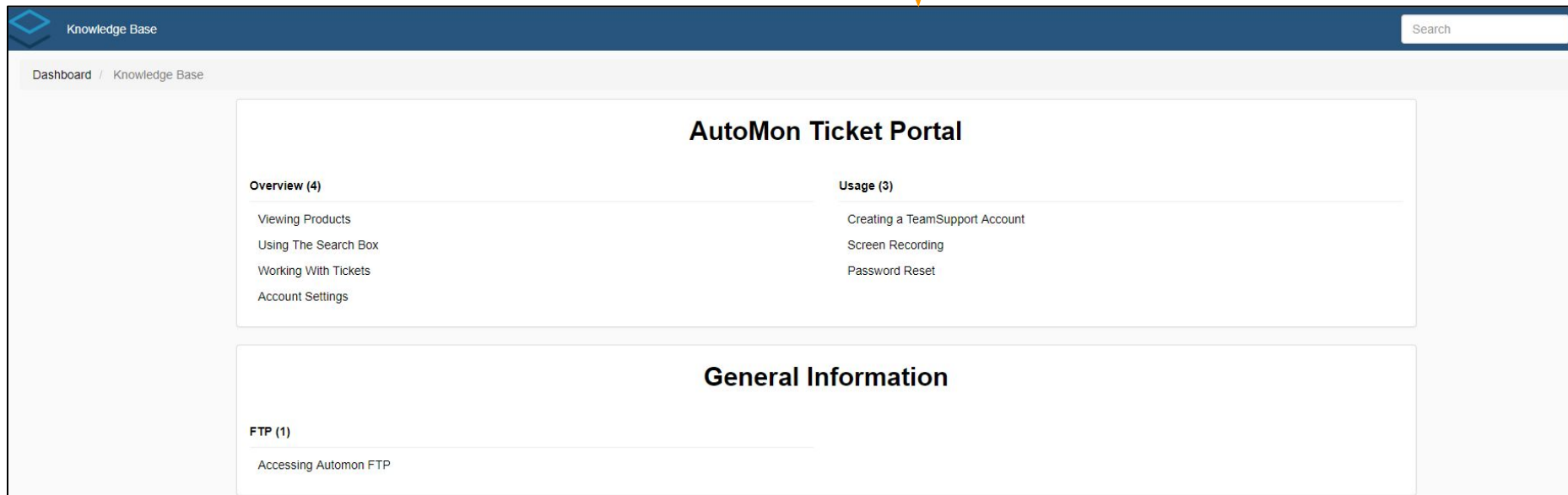
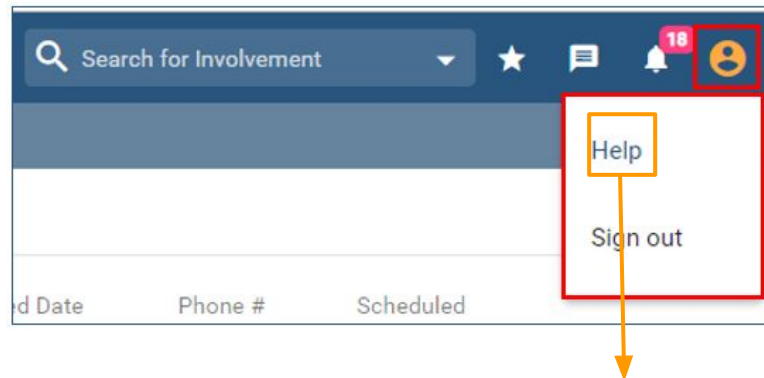
Notify me for the following events:

- ☒ Failed Drug Test
- ☒ Failed Drug Test Changed
- ☒ Missed Drug Test
- ☒ Refused Drug Test
- ☒ Failed To Appear
- ☒ Missed Contact
- ☒ Missed Treatment
- ☒ Missed Treatment Changed
- ☒ Non Compliant Treatment
- ☒ Non Compliant Treatment Changed

[CANCEL](#) [SAVE](#)

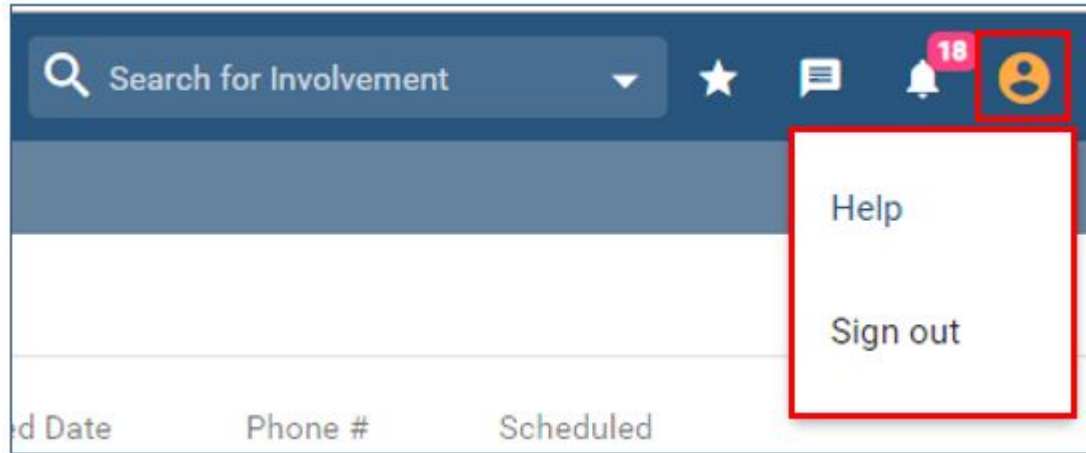
Notification Settings allows the user to select or deselect the type of alerts they wish to be notified of.

The **Help** icon will allow direct to users to our *TeamSupport* support portal. Users have the ability to search through the Knowledge Base articles to find helpful hints and ‘how to’s’.



MASTER HEADER - USER MENU

The **Profile** Icon will display a drop-down menu with links to the *Help* and *Sign Out*.

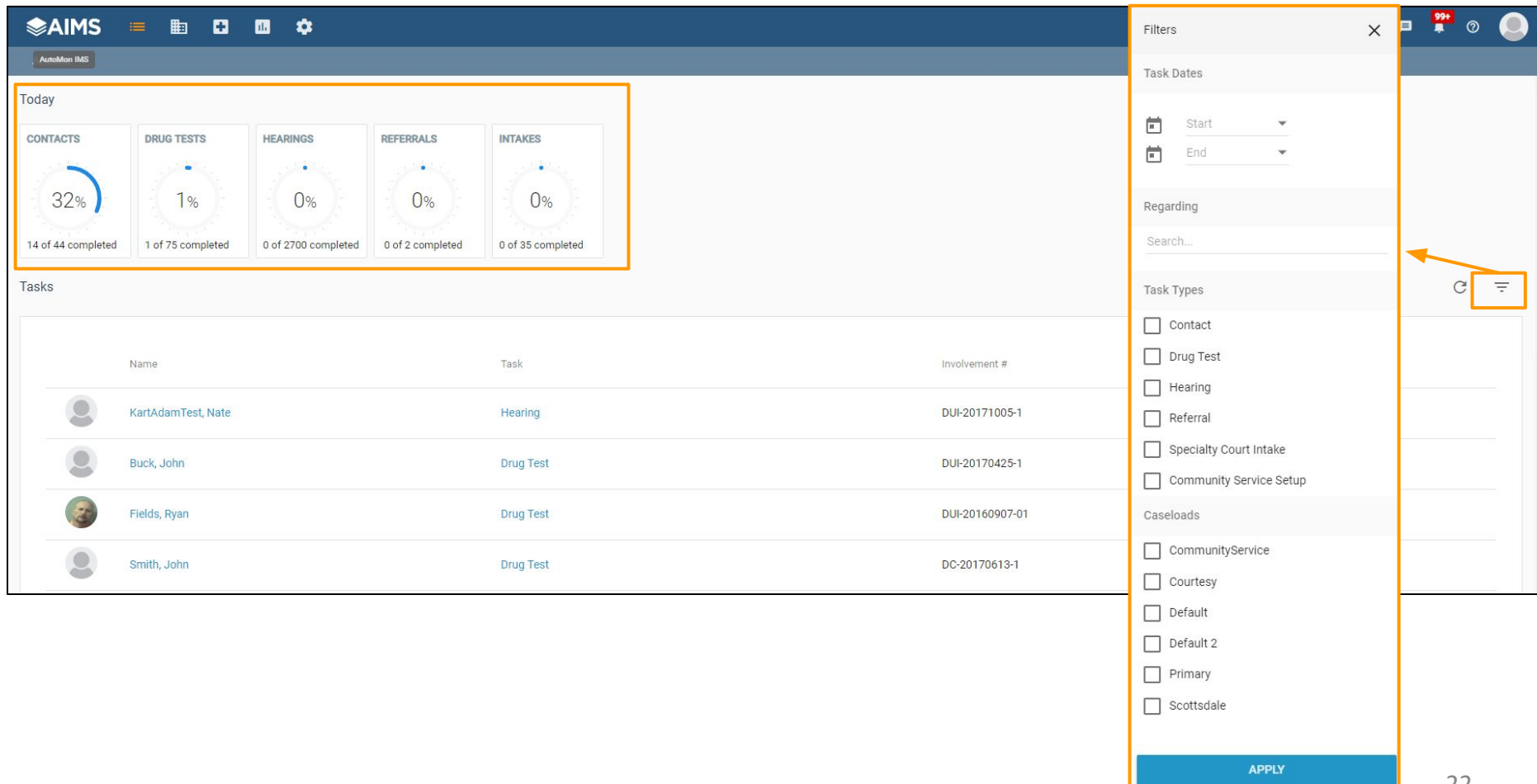


Subtopics:

1. Overview
2. Today's Percentages
3. Tasks

AGENDA - OVERVIEW

The Agenda will display a list of client tasks to be completed. Users also receive insights into the percentage of completed Contacts, Drug Tests, Hearings, Referrals, and Intakes. The list of Tasks will display in order by due date and can be Filtered by Date Range, Task types, Caseloads, and/or Client.



AIMS AutoMon IMS

Today

CONTACTS	DRUG TESTS	HEARINGS	REFERRALS	INTAKES
32%	1%	0%	0%	0%
14 of 44 completed	1 of 75 completed	0 of 2700 completed	0 of 2 completed	0 of 35 completed

Tasks

Name	Task	Involvement #
KartAdamTest, Nate	Hearing	DUI-20171005-1
Buck, John	Drug Test	DUI-20170425-1
Fields, Ryan	Drug Test	DUI-20160907-01
Smith, John	Drug Test	DC-20170613-1

Filters

Task Dates

Start
 End

Regarding

Search...

Task Types

- ☐ Contact
- ☐ Drug Test
- ☐ Hearing
- ☐ Referral
- ☐ Specialty Court Intake
- ☐ Community Service Setup

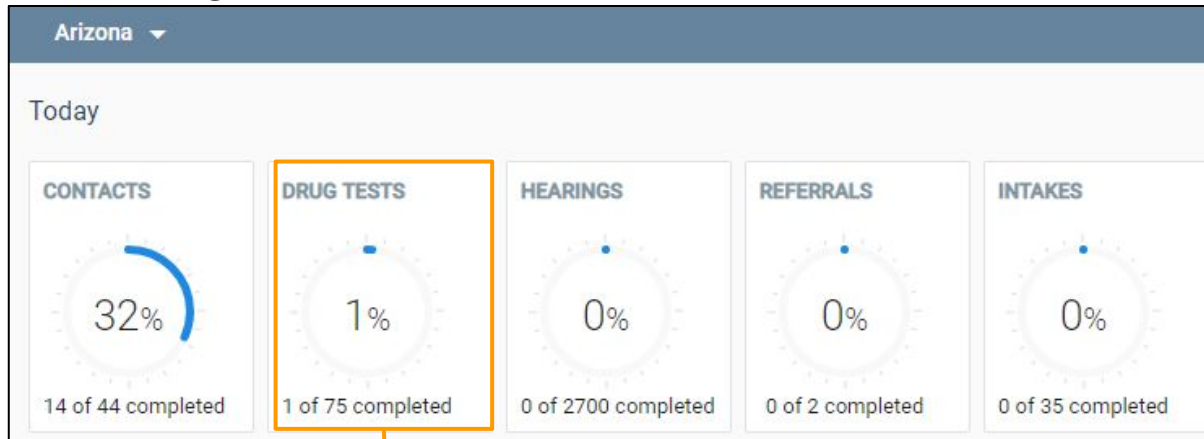
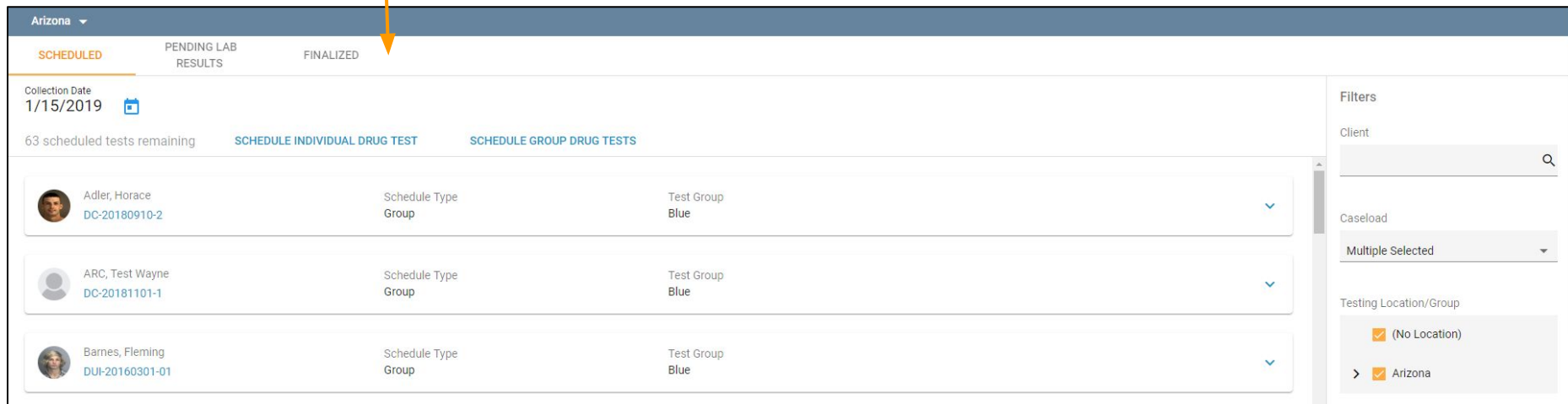
Caseloads

- ☐ CommunityService
- ☐ Courtesy
- ☐ Default
- ☐ Default 2
- ☐ Primary
- ☐ Scottsdale

APPLY

AGENDA - TODAY'S PERCENTAGES

Users can click Today's Contacts, Drug Tests, Hearings, Referrals, or Intakes Percentage box in order to navigate to the selected sections Schedules list.

Arizona

SCHEDULED PENDING LAB RESULTS FINALIZED

Collection Date: 1/15/2019

63 scheduled tests remaining

[SCHEDULE INDIVIDUAL DRUG TEST](#) [SCHEDULE GROUP DRUG TESTS](#)

Client	Schedule Type	Test Group
Adler, Horace DC-20180910-2	Group	Blue
ARC, Test Wayne DC-20181101-1	Group	Blue
Barnes, Fleming DUI-20160301-01	Group	Blue

Filters

Client:

Caseload: **Multiple Selected**

Testing Location/Group:

- ☒ (No Location)
- ☒ Arizona




AGENDA - TASKS

The Tasks section allows Users to view upcoming task for all Client's. Users can click on the blue hyperlinked Task name in order to complete the task.

Tasks	
Name	Task
 Berger, Anne	Hearing
 Caddy, Stan	Hearing
 Davis, Brad	Hearing

Arizona ▾

← Hearing Info

STATUS

Pending

INVOLVEMENT #

DC-20180409-1

HEARING DATE

Tuesday, Jan 1, 2019

Subtopics:

1. Overview
2. Views
3. Filters
4. Dockets
5. Drug Tests
6. Contacts

AIMS 📅 📊 🔍 🔧 🔖 🔔 👤

Search for Involvement

SCHEDULE < January 2019 > View By: Month

Filters

All Day Events

☒ Drug Tests

Appointments

☒ Hearings

☒ Contacts

Caseload

☒ (Unassigned)

☐ CommunityService

☐ Courtesy

☒ Default


☐ Default 2

☐ Primary

☐ Scottsdale

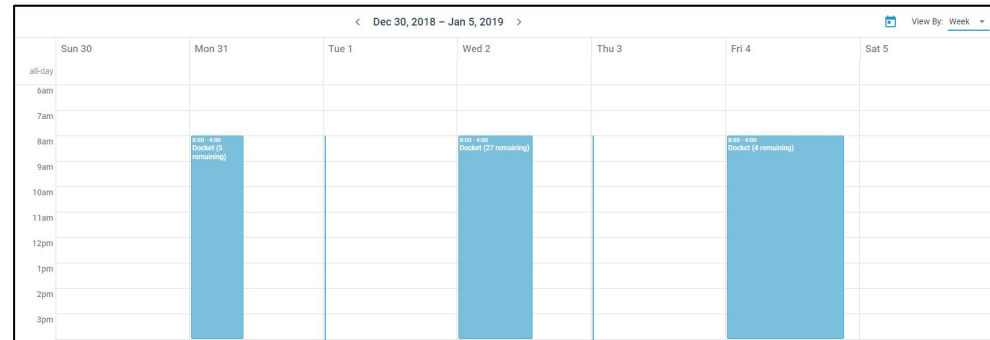
☐ Show Completed Events

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	31	1	2	3	4	5
	8a Docket (5 remaining)	8a Docket (14 remaining)	8a Docket (27 remaining)	8a Docket (49 remaining)	8a Docket (4 remaining)	
6	7	8	9	10	11	12
	8a Docket (2 remaining)	8a Docket (14 remaining)	8a Docket (32 remaining)	8a Docket (49 remaining)	8a Docket (2 remaining)	
13	14	15	16	17	18	19
	+12 more	Drug Testing (57 remaining) 12a Telephone - McDonald, Larry +30 more	Drug Testing (1 remaining) 8a Docket (27 remaining) +6 more	Drug Testing (8 remaining) 8a Docket (49 remaining) +33 more	Drug Testing (114 remaining) 8a Docket (4 remaining) +2 more	Drug Testing (56 remaining)
20	21	22	23	24	25	26
	12a Office - Rob, Richard 8a Docket (3 remaining) +6 more	8a Docket (14 remaining) 9a Office - McDonald, Larry	8a Docket (32 remaining)	8a Docket (49 remaining)	8a Docket (2 remaining)	
27	28	29	30	31	1	2
	10a Docket (3 remaining)	9a Office - Cain, Michael	Drug Testing (1 remaining)		8a Office - Test, AutoMon 10a Docket (3 remaining)	
3	4	5	6	7	8	9

The User's calendar will default to a monthly **View**. Users can change this view by selecting one of the three view in the drop down in the top right corner of the calendar. The icons appear as follows:  **View By:** Month ▾. Once a User selects a view, the date range slider will appear in the middle of the calendar view. From here, Users can adjust the timeframe that will populate the calendar.

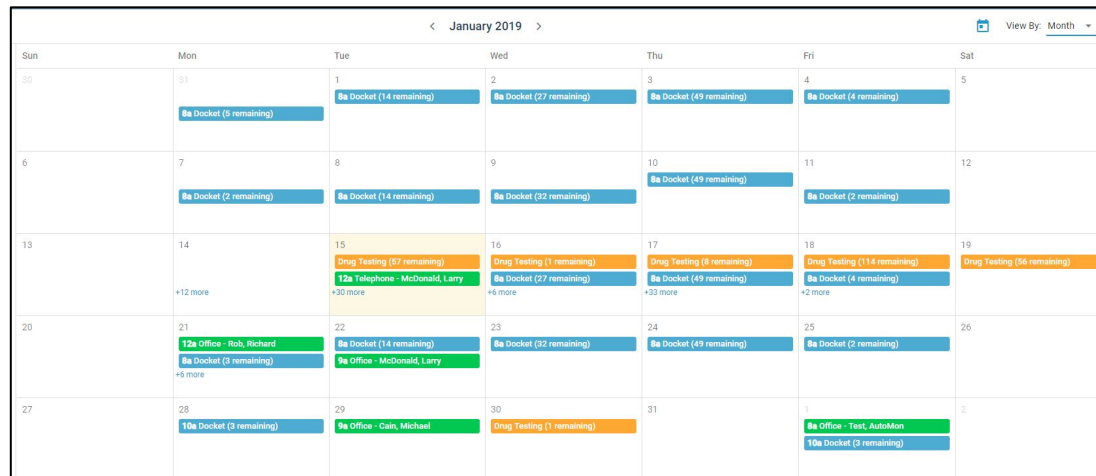


Daily



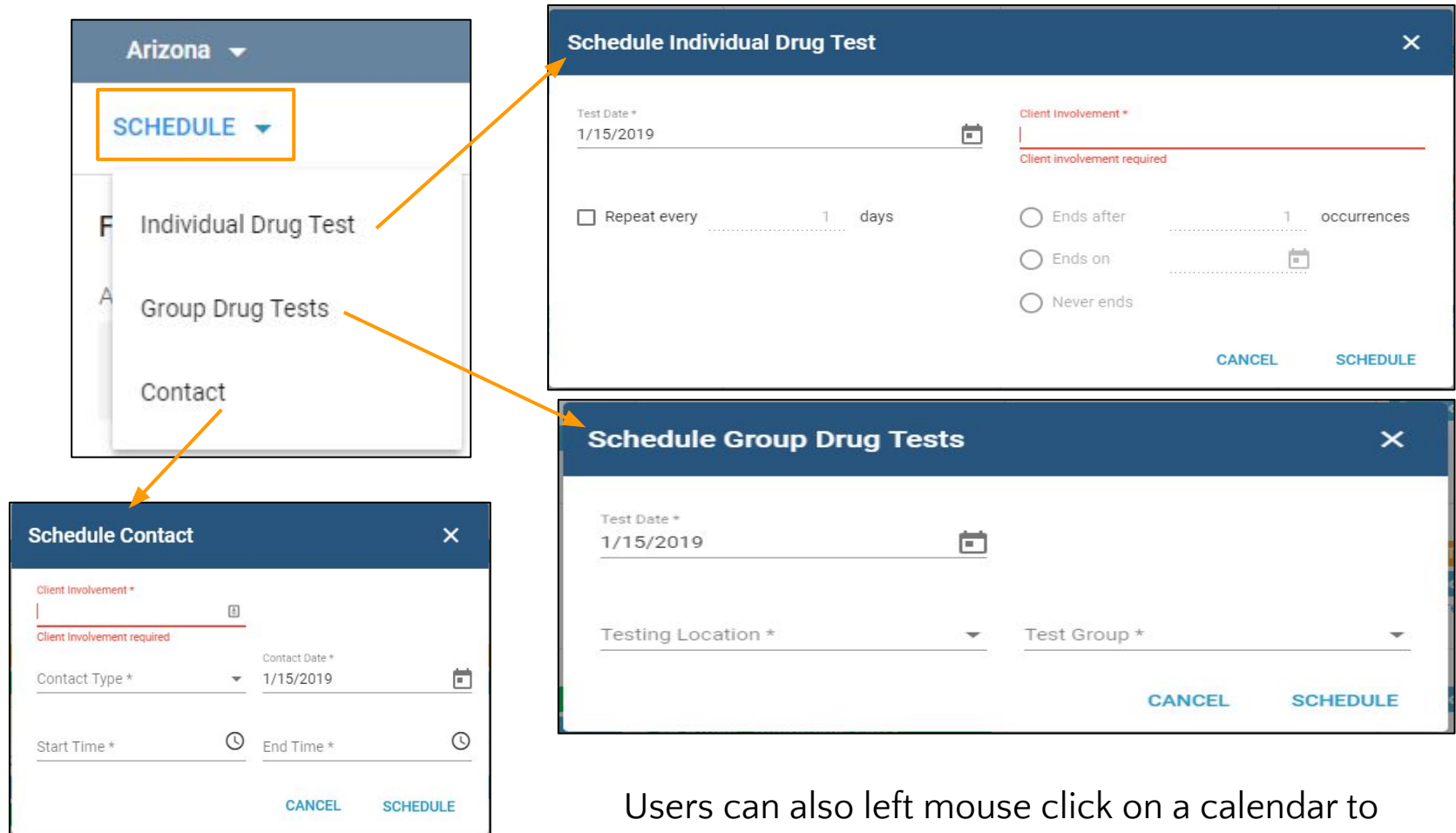
Weekly

Monthly



CALENDAR - SCHEDULE NEW EVENTS & APPOINTMENTS

Users have the ability to **Schedule** new appointments from the calendar such as Individual Drug Test, Group Drug Test, and Contact.



The image displays the AutoMon calendar interface. On the left, a dropdown menu is open under the 'SCHEDULE' button, showing options: 'Individual Drug Test', 'Group Drug Tests', and 'Contact'. Three orange arrows point from these options to their respective scheduling forms on the right.

Schedule Individual Drug Test

Test Date *
1/15/2019

Client Involvement *
Client involvement required

☐ Repeat every 1 days

☐ Ends after 1 occurrences
☐ Ends on
☐ Never ends

CANCEL SCHEDULE

Schedule Group Drug Tests

Test Date *
1/15/2019

Testing Location *
Test Group *

CANCEL SCHEDULE

Schedule Contact

Client Involvement *
Client involvement required

Contact Date *
1/15/2019

Contact Type *

Start Time *
End Time *

CANCEL SCHEDULE

Users can also left mouse click on a calendar to schedule new drug tests and contacts.

CALENDAR - FILTERS

Users have the ability to **filter** the events they would like displayed on the calendar by selecting and deselecting the events, appointments, Caseloads, and indicate if you want to see completed events.

Filters

All Day Events

☒ Drug Tests

Appointments

☒ Hearings

☒ Contacts

Caseload

☒ (Unassigned)

☐ CommunityService

☐ Courtesy

☒ Default

☐ Default 2

☐ Primary

☐ Scottsdale

☐ Show Completed Events

< January 2019 >							View By: Month
Sun	Mon	Tue	Wed	Thu	Fri	Sat	
30	31 8a Docket (5 remaining)	1 8a Docket (14 remaining)	2 8a Docket (27 remaining)	3 8a Docket (49 remaining)	4 8a Docket (4 remaining)	5	
6	7 8a Docket (2 remaining)	8 8a Docket (14 remaining)	9 8a Docket (32 remaining)	10 8a Docket (49 remaining)	11 8a Docket (2 remaining)	12	
13	14 +12 more	15 Drug Testing (57 remaining) 12a Telephone - McDonald, Larry +30 more	16 Drug Testing (1 remaining) 8a Docket (27 remaining) +6 more	17 Drug Testing (3 remaining) 8a Docket (49 remaining) +33 more	18 Drug Testing (114 remaining) 8a Docket (4 remaining) +2 more	19 Drug Testing (56 remaining)	
20	21 12a Office - Rob, Richard 8a Docket (3 remaining) +6 more	22 8a Docket (14 remaining) 9a Office - McDonald, Larry	23 8a Docket (32 remaining)	24 8a Docket (49 remaining)	25 8a Docket (2 remaining)	26	
27	28 10a Docket (3 remaining)	29 9a Office - Cain, Michael	30 Drug Testing (1 remaining)	31	1 8a Office - Test, AutoMon 10a Docket (3 remaining)	2	

CALENDAR - DOCKETS

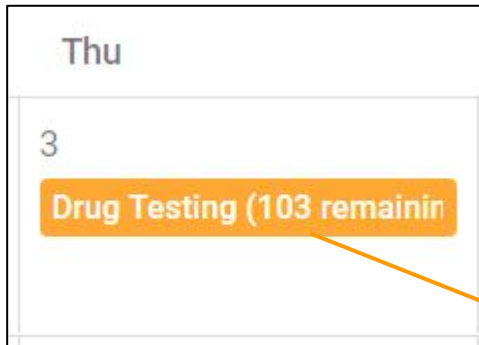
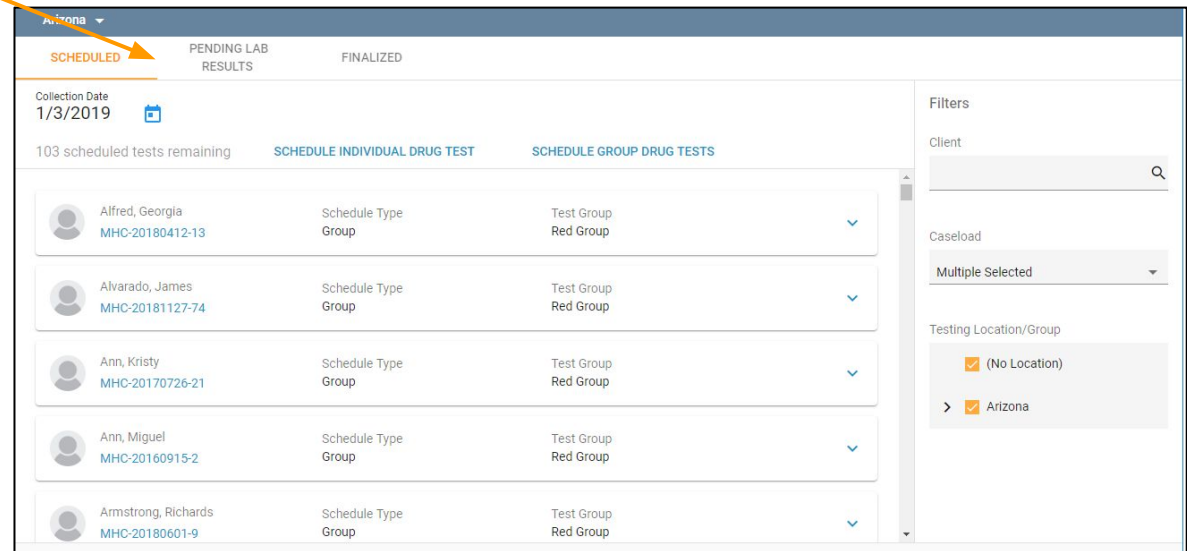
The Calendar displays all **Dockets** scheduled in blue. By clicking on the Blue calendar event, the User is shown the Clients on that particular docket, in addition to the start time.

	8	9
	15 <div>Drug Testing (109 remaining)</div> <div>9a Docket (1 remaining)</div>	16

Docket		
<input type="checkbox"/>	Name	ID #
<input type="checkbox"/>	 Alvarado, James	MHC-20181127-74

CALENDAR - DRUG TESTS

The Calendar displays **Drug Tests** as Orange events. The amount of tests to administer is in parenthesis. Users can click on any Drug Test event displayed on the calendar to be navigated to a list view of Clients scheduled for drug testing on the selected date.

Arizona

SCHEDULED PENDING LAB RESULTS FINALIZED

Collection Date
1/3/2019

103 scheduled tests remaining

SCHEDULE INDIVIDUAL DRUG TEST SCHEDULE GROUP DRUG TESTS

Alfred, Georgia MHC-20180412-13	Schedule Type Group	Test Group Red Group	▼
Alvarado, James MHC-20181127-74	Schedule Type Group	Test Group Red Group	▼
Ann, Kristy MHC-20170726-21	Schedule Type Group	Test Group Red Group	▼
Ann, Miguel MHC-20160915-2	Schedule Type Group	Test Group Red Group	▼
Armstrong, Richards MHC-20180601-9	Schedule Type Group	Test Group Red Group	▼

Filters

Client

Caseload

Multiple Selected

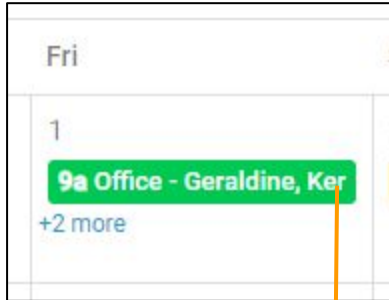
Testing Location/Group

☒ (No Location)

☒ Arizona

CALENDAR - REPORTING

The Calendar displays **Reporting Requirements** as Green appointments labeled “Contacts”. Users can click on any Contact appointment displayed on the Calendar to the specific Contact appointment. Users can then complete the Contact appointment.















Subtopics:

1. Overview
2. Client's Name
3. Pagination
4. Selecting Multiple
5. Icons
6. Schedule a new contact
7. Completing a contact
8. Marking as Missed



CONTACTS - OVERVIEW

The **Contact** tab allows Users to view all Clients who are scheduled to for a Contact appointment. The list is sorted by contact date in ascending order.

Arizona ▾						
Contacts						
<input type="checkbox"/>	Name	Contact Date	Contact Type	Contact time	Status	+
<input type="checkbox"/>	 Freda, Alfred	Jan 15, 2019	Office	9:00pm - 10:00pm	Scheduled	 
<input type="checkbox"/>	 Alfred, Georgia	Feb 1, 2019	Office	9:00am - 9:30am	Scheduled	 
<input type="checkbox"/>	 Geraldine, Kerry	Feb 1, 2019	Office	9:00am - 10:00am	Scheduled	 
<input type="checkbox"/>	 Gloria, Walters	Feb 1, 2019	Office	9:00am - 10:00am	Scheduled	 
Page: 1 ▾ Rows per page: 25 ▾ 1 - 4 of 4 < < > >						

CONTACTS - CLIENT'S NAME


Users can select a Client's name to be redirected to the Client's Involvement overview.

Contacts					
<input type="checkbox"/>	Name	Contact Date	Contact Type	Contact time	Status
<input type="checkbox"/>	 Freda, Alfred	Jan 15, 2019	Office	9:00pm - 10:00pm	Scheduled
<input type="checkbox"/>	 Alfred, Georgia	Feb 1, 2019	Office	9:00am - 9:30am	Scheduled

← Specialty Court

Freda, Alfred

28



Client Info

Criminal History

Involvement History

Involvement MHC-20181222-62

Activities

Involvement ID

MHC-20181222-62

Court/Judge

Mental Health Court 1

Caseload

Arizona

Sobriety Date

Awaiting Negative Test

Arrest

Referral

12/22/2018

Approval/Denial

Approved: 12/22/2018

Admitted

12/22/2018

Days In Program: 24

Phase History




























CHANGE PHASE STATUS

Track	Phase	Status	Start Date	End Date	Days In Phase
Default	Stabilization	In Progress	12/22/2018	Earliest Promotion: 12/22/2018	24

CONTACTS - PAGINATION

All scheduled Contacts will display in the list view. The list will display 25 results as a default. Users have the ability to increase the number of rows displayed per page, select a specific page, and navigate forward or backward within the page lists. The screen will also display the number of rows currently displayed.





Arizona ▾

<input type="checkbox"/>		Lock, John	Jan 15, 2019	Office	10:00am - 12:00pm	Scheduled		
<input type="checkbox"/>		Maddiger, Rachel	Jan 15, 2019	Office	10:00am - 12:00pm	Scheduled		
<input type="checkbox"/>		Masters, Phil	Jan 15, 2019	Office	10:00am - 12:00pm	Scheduled		
<input type="checkbox"/>		McDonald, Larry	Jan 15, 2019	Telephone		Scheduled		
<input type="checkbox"/>		Miltenberger, Paul	Jan 15, 2019	Office	10:00am - 12:00pm	Scheduled		
<input type="checkbox"/>		Napier, Jack	Jan 15, 2019	Office	9:00am - 9:30am	Scheduled		
<input type="checkbox"/>		Oshida, Joseph	Jan 15, 2019	Office	10:00am - 12:00pm	Scheduled		
<input type="checkbox"/>		Patchman, Ivan	Jan 15, 2019	Office	12:30pm - 1:00pm	Scheduled		
<input type="checkbox"/>		Robertson, Emma	Jan 15, 2019	Office	10:00am - 12:00pm	Scheduled		

Page: 1 ▾






Rows per page: 25 ▾

1 - 25 of 88

CONTACTS - SELECTING MULTIPLE

Users can **Select Multiple** Clients simultaneously by using the boxes to the left of a Client's profile picture. Users can also select *All Clients* by clicking the top box to the left of "Name". Users can then select "Mark as Missed" icon in the top right corner of the page.

✕ 2 selected						
<input type="checkbox"/>	Name ↑	Contact Date	Contact Type	Contact time	Status	
<input checked="" type="checkbox"/>	 Freda, Alfred	Jan 15, 2019	Office	9:00pm - 10:00pm	Scheduled	
<input type="checkbox"/>	 Alfred, Georgia	Feb 1, 2019	Office	9:00am - 9:30am	Scheduled	
<input checked="" type="checkbox"/>	 Geraldine, Kerry	Feb 1, 2019	Office	9:00am - 10:00am	Scheduled	
<input type="checkbox"/>	 Gloria, Walters	Feb 1, 2019	Office	9:00am - 10:00am	Scheduled	














Page: 1 ▾ Rows per page: 25 ▾ 1 - 4 of 4 |< < > >|

CONTACTS - ICONS

Users can schedule a new contact appointment by clicking on the + (plus) icon on the top right side. Users can also either mark a Client as missed by clicking on the red icon or complete the appointment by clicking the pen icon on the right side.

Arizona ▾

Contacts

<input type="checkbox"/>	Name ↑	Contact Date	Contact Type	Contact time	Status	
<input type="checkbox"/>	 Freda, Alfred	Jan 15, 2019	Office	9:00pm - 10:00pm	Scheduled	 
 	Alfred, Georgia	Feb 1, 2019	Office	9:00am - 9:30am	Scheduled	 
<input type="checkbox"/>	 Geraldine, Kerry	Feb 1, 2019	Office	9:00am - 10:00am	Scheduled	 
<input type="checkbox"/>	 Gloria, Walters	Feb 1, 2019	Office	9:00am - 10:00am	Scheduled	 


Page: 1 ▾ Rows per page: 25 ▾ 1 - 4 of 4
 ⏪ < > ⏩

CONTACTS - SCHEDULING A NEW CONTACT

Users can click on the plus icon to schedule a new Contact appointment. Users will be required to select a Client Involvement, contact type, contact date, start and end times.

Contacts

☐


Name 

Contact Date


Contact Type

Contact time

Status



☐




Geraldine, Kerry


Feb 1, 2019

Office


9:00am - 10:00am

Scheduled





☐




Gloria, Walters


Feb 1, 2019

Office

9:00am - 10:00am

Scheduled





Schedule Contact

×

Client Involvement *

Client Involvement required

Contact Type *

Contact Date *

1/15/2019

Start Time *

End Time *

CANCEL




SCHEDULE

CONTACTS - COMPLETING A CONTACT

Users can click on the pen icon along the Client's row from the scheduled list to complete the Contact or mark the Contact as missed. By clicking on the Green checkmark icon, Users can mark the Contact as complete.

Contacts

+

	Name	Contact Date	Contact Type	Contact time	Status	
<input type="checkbox"/>	 Geraldine, Kerry	Feb 1, 2019	Office	9:00am - 10:00am	Scheduled	<div>   </div>

← Contact Details

NAME

Geraldine, Kerry

INVOLVEMENT #

DC-20171002-122

STATUS

Scheduled

CONTACT TYPE

Office

CONTACT DATE

Feb 1, 2019

CONTACT TIME

9:00am - 10:00am

Complete Contact

CONTACT DETAILS

Contact type *

Office

Contact date *

1/15/2019

Start time *


9:00am

End time *

10:00am

Notes

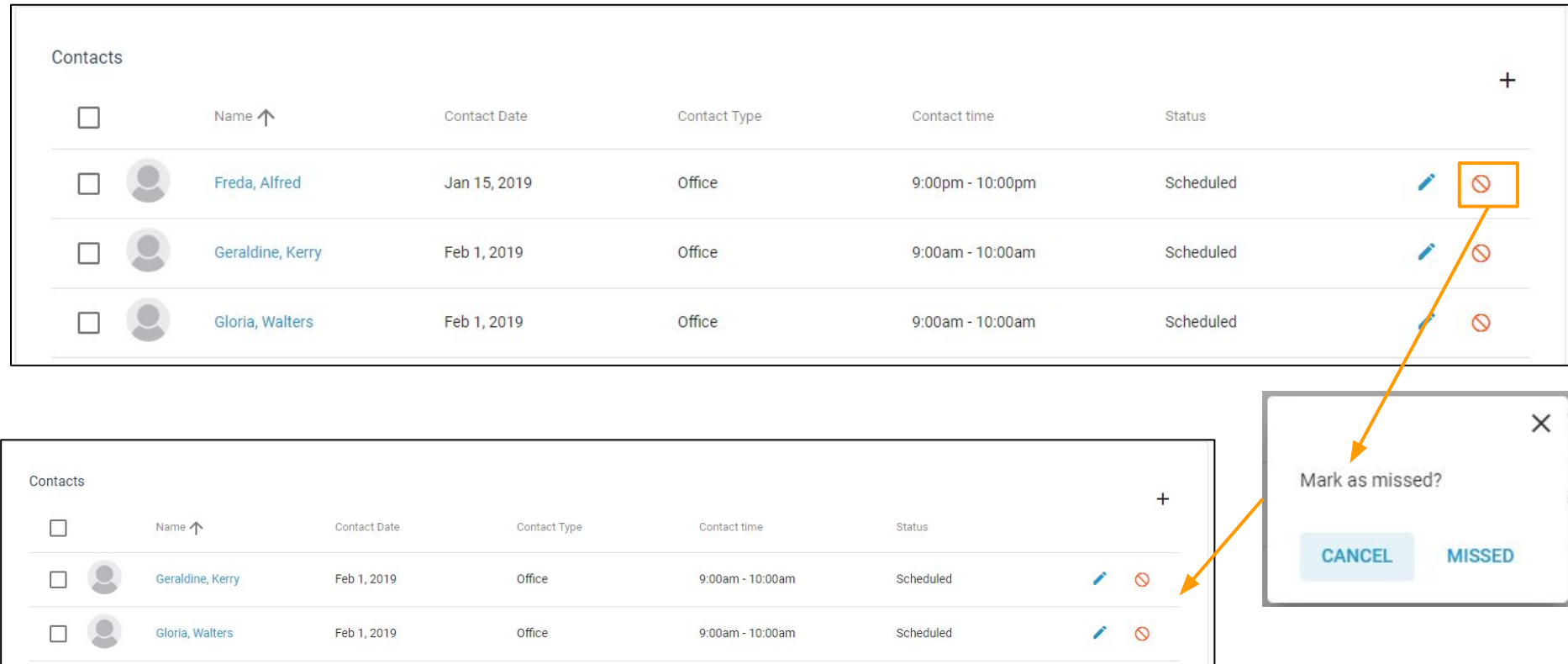
CANCEL









COMPLETE CONTACT





CONTACTS - MARK AS MISSED

If a Client misses a scheduled Contact appointment, Users can click the *Mark as Missed* icon. The User will be presented with a confirmation dialog. Their name will then disappear from the scheduled list.



The screenshot illustrates the process of marking a contact as missed. It shows a table of contacts with columns for Name, Contact Date, Contact Type, Contact time, and Status. A confirmation dialog titled 'Mark as missed?' is shown, with 'CANCEL' and 'MISSED' buttons. An arrow points from the 'Mark as missed?' icon in the table to the dialog. Another arrow points from the dialog to the updated table, where the contact 'Freda, Alfred' has been removed.

	Name ↑	Contact Date	Contact Type	Contact time	Status	
<input type="checkbox"/>	Freda, Alfred	Jan 15, 2019	Office	9:00pm - 10:00pm	Scheduled	 
<input type="checkbox"/>	Geraldine, Kerry	Feb 1, 2019	Office	9:00am - 10:00am	Scheduled	 
<input type="checkbox"/>	Gloria, Walters	Feb 1, 2019	Office	9:00am - 10:00am	Scheduled	 

	Name ↑	Contact Date	Contact Type	Contact time	Status	
<input type="checkbox"/>	Geraldine, Kerry	Feb 1, 2019	Office	9:00am - 10:00am	Scheduled	 
<input type="checkbox"/>	Gloria, Walters	Feb 1, 2019	Office	9:00am - 10:00am	Scheduled	 

Mark as missed?
 CANCEL MISSED

Subtopics:

1. Overview
2. Client's Involvement
3. Filtering
4. Completing A Test
5. Marking Lab Results
6. Pending Prescription Verification
7. Viewing/Editing Finalized Tests
8. Resolve Integration Exceptions

DRUG TESTING - OVERVIEW

The **Drug Testing** tab will allow Users to view all Clients who are scheduled for drug or alcohol testing for a specific day. Users can click to view Pending Lab Results, Pending Prescription Verification, or Finalized tests. This view also allows Users to schedule an individual or group drug test.

SCHEDULED

PENDING LAB VERIFICATION

PENDING PRESCRIPTION VERIFICATION

FINALIZED

RESOLVE EXCEPTIONS (2)








Collection Date

April 16, 2018

7 scheduled tests remaining

SCHEDULE INDIVIDUAL DRUG TEST

SCHEDULE GROUP DRUG TEST

	Barrow, Thomas DUI-20161019-73	Schedule Type By Group	Group Blue	▼
	Conner, Alexis DUI-20161019-73	Schedule Type By Group	Group Blue	▼
	Lane, Constance DUI-20170228-33	Schedule Type By Group	Group Blue	▼
	Montoya, Art DUI-20161019-73	Schedule Type By Group	Group Blue	▼
	Phillips, Dan DC-20180226-1	Schedule Type Individual		▼
	Randall, Jack DUI-20161019-73	Schedule Type By Group	Group Blue	▼
	Sellers, Valerie	Schedule Type	Group	

Filters

Client

Caseload

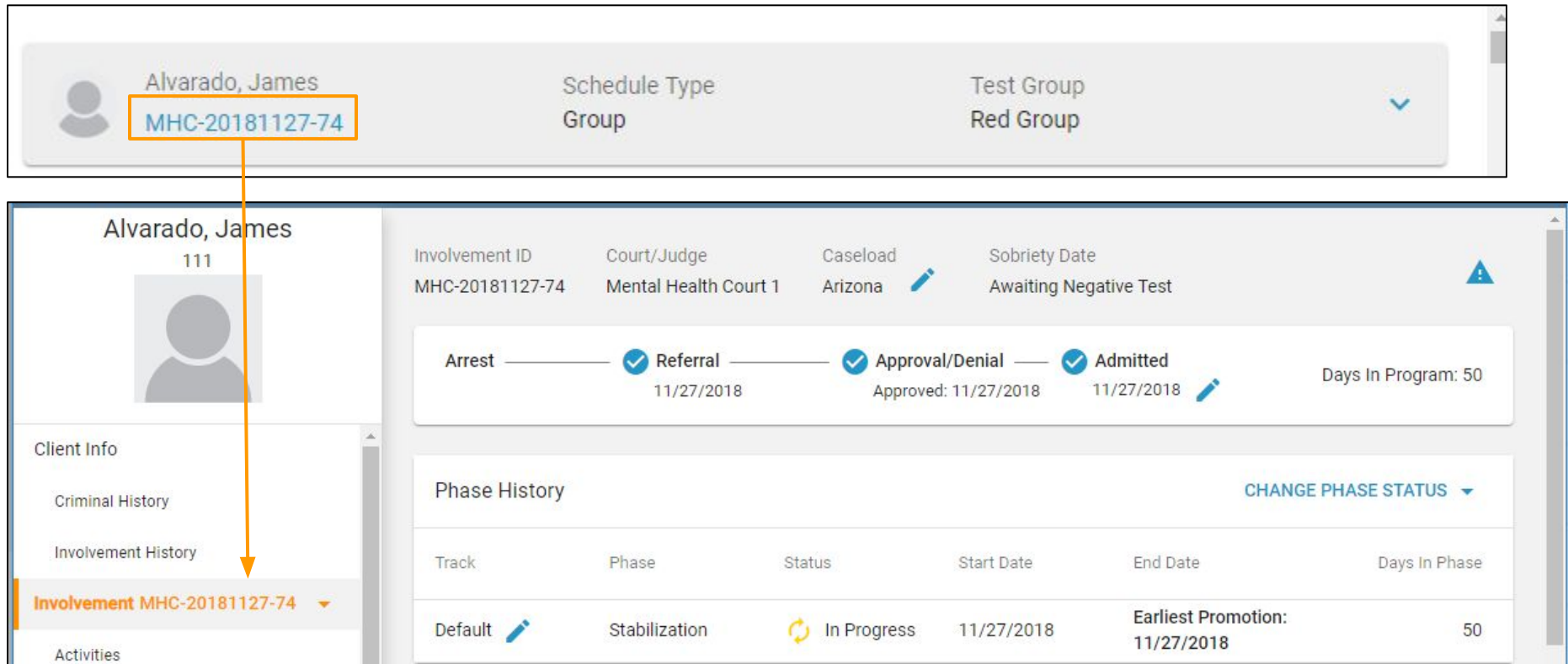
Multiple Selected

Testing Location/Group

☒ [No Location]
 ☒ Glendale
 ☒ [Individual]
 ☒ Blue
 ☒ Green
 ☒ Red
 ☒ Yellow
 ☒ Mesa
 ☒ [Individual]
 ☒ Blue
 ☒ Green

DRUG TESTING - CLIENT'S INVOLVEMENT

Users can click on a **Client's Involvement** to be redirected to that Client's Involvement Overview.



Alvarado, James
111

MHC-20181127-74

Schedule Type: Group

Test Group: Red Group

Involvement ID: MHC-20181127-74

Court/Judge: Mental Health Court 1

Caseload: Arizona

Sobriety Date: Awaiting Negative Test

Arrest — Referral (11/27/2018) — Approval/Denial (Approved: 11/27/2018) — Admitted (11/27/2018)

Days In Program: 50

Phase History

CHANGE PHASE STATUS

Track	Phase	Status	Start Date	End Date	Days In Phase
Default	Stabilization	In Progress	11/27/2018	Earliest Promotion: 11/27/2018	50

Client Info

Criminal History

Involvement History

Involvement MHC-20181127-74

Activities

DRUG TESTING - FILTERING

The Filtering feature on the right side allows Users to filter by Caseload and Testing Location/Group. Users also have the ability to search for a specific Client in the search bar.

SCHEDULED

PENDING LAB VERIFICATION

PENDING PRESCRIPTION VERIFICATION

FINALIZED

Collection Date
 April 16, 2018

7 scheduled tests remaining

[SCHEDULE INDIVIDUAL DRUG TEST](#)

[SCHEDULE GROUP DRUG TEST](#)

Barrow, Thomas DUI-20161019-73	Schedule Type By Group	Group Blue	▼
Conner, Alexis DUI-20161019-73	Schedule Type By Group	Group Blue	▼
Lane, Constance DUI-20170228-33	Schedule Type By Group	Group Blue	▼
Montoya, Art DUI-20161019-73	Schedule Type By Group	Group Blue	▼
Phillips, Dan DC-20180226-1	Schedule Type Individual		▼
Randall, Jack DUI-20161019-73	Schedule Type By Group	Group Blue	▼
Sellers, Valerie	Schedule Type	Group	

RESOLVE EXCEPTIONS (2)

Filters

Client

Caseload

Multiple Selected







Testing Location/Group


☒ [No Location]
 ☒ Glendale
 ☒ [Individual]
 ☒ Blue
 ☒ Green
 ☒ Red
 ☒ Yellow
 ☒ Mesa
 ☒ [Individual]
 ☒ Blue
 ☒ Green

DRUG TESTING - COMPLETING A TEST

Users can click on a Client's test row to expand the details in order to indicate the outcome, testing device, indicate the test was sent to a lab and enter the specimen ID. For tests that are marked as 'Sent for lab verification', the test is not finalized yet, therefore, details such as Infractions (if positive), Achievements (if negative), and Sobriety Date are not changed until a finalized outcome has been recorded.

102 scheduled tests remaining
SCHEDULE INDIVIDUAL DRUG TEST
SCHEDULE GROUP DRUG TESTS

 Alvarado, James MHC-20181127-74	Schedule Type Group	Test Group Red Group	
 Ann, Kristy MHC-20170726-21	Schedule Type Group	Test Group Red Group	
 Ann, Miguel MHC-20160915-2	Schedule Type Group	Test Group Red Group	


 Alvarado, James
 MHC-20181127-74

Schedule Type
 By Group: Red Group

Scheduled By
 System Settings

Collection Date
Jan 3, 2019

Outcome *

Testing Device

Notes


☐ Sent for lab verification

Specimen ID

CANCEL
SAVE

DRUG TESTING - MARKING LAB RESULTS

When a User has indicated that the initial test has been sent to the lab for verification, the specific test will no longer appear in the Scheduled list and instead will show in the Pending Lab Results list. The User can then indicate the Lab outcome as a separate outcome from the initial outcome and upload lab documents. For Courts that do not have a lab integration with AIMS, they will indicate a panel detected has an approved prescription level within the Pending Lab Results tab. For Courts that have a lab integration, they will do the same function under the Pending Prescription Verification Tab.




Ann, Kristy
MHC-20170726-21

Schedule Type
By Group: Red Group

Scheduled By
[System Settings](#)

Collection Date
08/05/2018

Initial Outcome
Positive for THC,AMP,COC,OPI,BAR

Notes


Lab Result Date *
1/15/2019

Lab Outcome *

Specimen ID
23AB332C-E0D6-47B6-B

Notes

Lab Result Details

Panel	Detected	Level	Cutoff	Units	Approved Prescription Level	Outcome	
AMP	<input checked="" type="checkbox"/>	Level	Cutoff	Units	<input checked="" type="checkbox"/>	Negative	
BAR	<input type="checkbox"/>					Negative	
COC	<input type="checkbox"/>					Negative	
OPI	<input type="checkbox"/>					Negative	
TCH	<input type="checkbox"/>					Negative	

[+ Add Another Result](#)

Documents

Drop files here or click to upload




CANCEL

SAVE

DRUG TESTING - PENDING PRESCRIPTION VERIFICATION

For Courts that have an lab integration with AIMS, the Pending Prescription Verification tab will be the area to verify and approve the Client has a prescription that conflicted with the test. This list will only display for Clients who have a Prescriptions listed within their Client info page **AND** the prescription test conflict box is checked.


Barrow, Thomas
[DC-20161019-73](#)

Verified Outcome *
 Positive for THC

[View Clients Prescription List](#)

Schedule Type
 By Group: Blue

Scheduled By
[System Settings](#)

Collection Date
 04/16/2018

Initial Outcome
 Positive for THC

Initial Testing Device
 5 Panel Cup

Notes
 (1)



Test Result Details

Panel	Detected	Level	Cutoff	Units	Approved Prescription Level	Outcome
THC	<input checked="" type="checkbox"/>	.02	.01	gm/dL	<input type="checkbox"/>	Positive
AMP	<input type="checkbox"/>					None detected
COC	<input type="checkbox"/>					None detected
OPI	<input type="checkbox"/>					None detected
BAR	<input type="checkbox"/>					None detected

CANCEL
 SAVE

Prescriptions
☐ One or more of these prescriptions could conflict with drug testing

[ADD PRESCRIPTION](#)

Prescription	Dosage	Notes
Lexapro	10 mg per day	
Lunesta	2 mg per day	

DRUG TESTING - PENDING PRESCRIPTION VERIFICATION

On the Prescriptions table on the Clinical Info tab of the Client page, there will be a checkbox field to indicate that one or more prescriptions may interfere with drug testing (defaulted to unchecked). Note that any drug test results sent to the lab that ***do not have this box checked*** will be marked as Finalized, with all appropriate infractions, achievements and notifications.

PERSONAL INFO
CONTACT INFO
EMPLOYMENT/INCOME
EDUCATION
MILITARY
CLINICAL INFO
DRUG USE
ASSOCIATES

Insurance Information

Eligible for Medicaid
Yes

Health Insurance Provider
Aetna

Policy Number
4547575335AW4

Last Medical Exam Date
08/16/2018

Diagnoses

Diagnosed with Substance Use Disorder
Yes

Diagnosed with Mental Illness
Not Available

Communicable Diseases
Not Available

Allergies
Not Available

Pregnancy

Currently Pregnant
Not Available

Prescriptions
☒ One or more of these prescriptions could conflict with drug testing results

ADD PRESCRIPTION

Prescription	Dosage	Comments
Ambien	1 mg per month	

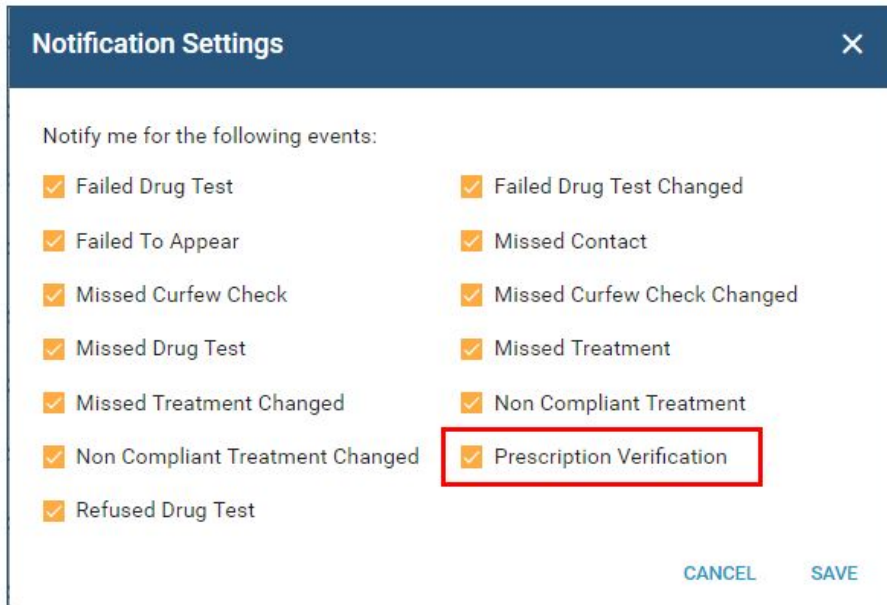
DRUG TESTING - PENDING PRESCRIPTION VERIFICATION

If the check box on the Client info is selected, any failed drug test results sent through integrations for the Client will be placed in the "Pending Prescriptions Verification" status and will display on the new tab.

No infractions will be created and the sobriety will not be reset at this point.

Additionally, a Prescription Verification notification will be sent with a description of "Drug Test pending prescription verification on <Date>".

A new notification type of "Prescription Verification" has been added; as with all Notifications, users can opt in or out of receiving the Notification.



The image shows a "Notification Settings" dialog box with a close button (X) in the top right corner. It contains a list of events to notify about, each with a checked checkbox. The events are arranged in two columns. The "Prescription Verification" option is highlighted with a red rectangular box. At the bottom right, there are "CANCEL" and "SAVE" buttons.

Notify me for the following events:	
<input checked="" type="checkbox"/> Failed Drug Test	<input checked="" type="checkbox"/> Failed Drug Test Changed
<input checked="" type="checkbox"/> Failed To Appear	<input checked="" type="checkbox"/> Missed Contact
<input checked="" type="checkbox"/> Missed Curfew Check	<input checked="" type="checkbox"/> Missed Curfew Check Changed
<input checked="" type="checkbox"/> Missed Drug Test	<input checked="" type="checkbox"/> Missed Treatment
<input checked="" type="checkbox"/> Missed Treatment Changed	<input checked="" type="checkbox"/> Non Compliant Treatment
<input checked="" type="checkbox"/> Non Compliant Treatment Changed	<input checked="" type="checkbox"/> Prescription Verification
<input checked="" type="checkbox"/> Refused Drug Test	

CANCEL SAVE

If the user has the Edit Drug Test Results permission, drug tests pending verification can be updated with a verified outcome, and approved prescription checkbox.

All other fields are disabled – Verified outcome options are **only** Negative, Positive, Diluted, Adulterated or Admitted

Once saved, the normal process completes based on the verified outcome selected, creating the appropriate infractions, sobriety dates and notifications, as necessary.

If a User does not have the Edit Drug Test Results permission, all fields, buttons and icons are disabled on the Pending Prescription Verification tab.

DRUG TESTING - VIEWING/EDITING FINALIZED TESTS

Users can easily see a list of completed tests on the Finalized tab. The user can click on the pen icon to edit the finalized test. Users can only edit one level up, for example, if the test has an initial outcome and a lab outcome, the user can only edit the lab outcome. However, if the test only has a finalized initial outcome, the user can edit the initial outcome.

Alvarado, James

MHC-20181127-74

Final Outcome

Adulterated

Schedule Type

By Group: Red Group

Scheduled By

System Settings

Collection Date

01/03/2019

Initial Outcome

Negative

Testing Device

N/A

Notes

Lab Result Date

01/15/2019

Lab Outcome

Adulterated

Specimen ID

1321321

Lab Result Details


There are no results for this drug test

Documents

There are no documents for this drug test

DRUG TESTING - VIEWING/EDITING FINALIZED TESTS

Once in Edit mode, Users can then update the last outcome of the test, add another panel, change the panel, and upload documents.




Alvarado, James
 MHC-20181127-74


Schedule Type
 By Group: Red Group

Scheduled By
[System Settings](#)

Collection Date
 01/03/2019

Initial Outcome
 Negative


Notes


Lab Result Date *
 1/15/2019
 


Lab Outcome *
 Adulterated

Specimen ID
 1321321

Lab Result Details

Panel	Detected	Level	Cutoff	Units	Approved Prescription Level	Outcome
<div>  Add Another Result </div>						

Documents

Drop files here or click to upload


CANCEL

SAVE

DRUG TESTING - RESOLVE INTEGRATION EXCEPTIONS

For Courts that have a lab integration with AIMS, Users will have the ability to view lab integration exceptions and correct them so that the test(s) can be imported.

SCHEDULED
PENDING LAB VERIFICATION
PENDING PRESCRIPTION VERIFICATION
FINALIZED

Collection Date
April 16, 2018

7 scheduled tests remaining
SCHEDULE INDIVIDUAL DRUG TEST
SCHEDULE GROUP DRUG TEST

RESOLVE EXCEPTIONS (2)

Filters
Client

Exception Popout - Google Chrome

https://f8ug25.axshare.com/exception_popout.html

Drug Testing Integration Exceptions

State of Louisiana > 11th JDC > Sabine > ADC

SUBMIT
PREVIOUS 2 errors remaining NEXT

Exception ID	Lab ID	Exception Date	Client Identifier	Name	DOB	Involvement	Specimen ID	Attached Document
100001	123	11/15/2018		Walters, Jane	04/26/1993	Not Available	235269	LabResult235269.pdf
100002	123	11/15/2018	2654523	Ventura, Sal	12/26/1972		235325	LabResult235325.pdf certification.pdf

Subtopics:

1. Overview
2. Filtering
3. Selecting Multiple
4. Icons
5. Completing a Review
6. Review Recommendations

HEARINGS - OVERVIEW

Users can click on the **Hearings** tab to display all Clients that have scheduled Hearings.

Docket				
<input type="checkbox"/>		Name	ID #	Date
<input type="checkbox"/>		Class, Edgar	DC-20170719-1	Oct 5, 2017
<input type="checkbox"/>		Harvey, Derek	DC-20170613-2	Oct 5, 2017
<input type="checkbox"/>		Stark, Sansa	DC-20170706-1	Oct 5, 2017

HEARINGS - FILTERING

Users can **filter** the Hearings List by a calendar date to view Docket Schedules.

HEARING DATE

S M T W T F S

Jan 2019 >

1 2 3 4 5

6 7 8 9 10 11 12



13 14 15 16 17 18 19

20 21 22 23 24 25 26

27 28 29 30 31


Docket

+

<input type="checkbox"/>	Name	ID #	Date	Time	Status	Actions
<input type="checkbox"/>	 Alvarado, James	MHC-20181127-74	Jan 15, 2019	9:00am to 10:00am	Pending	
<input type="checkbox"/>	 Ann, Miguel	MHC-20160915-2	Jan 15, 2019	8:00am to 8:30am	Pending	

HEARINGS - SELECTING MULTIPLE

Users can select multiple Clients by selecting the boxes to the left of a Client's profile picture. Users can also select all Clients by clicking the top box to the left of "Name". Users can then select "Status Reports" in order print Status Reports for all of the Clients checked or click "Mark as Missed" in the top right corner of the page to mark all of the selected Clients as "missed."

X 2 selected							 
<input type="checkbox"/>		Name	ID #	Date	Time	Status	Actions
<input checked="" type="checkbox"/>		Class, Edgar	DC-20170719-1	Oct 5, 2017	4:30pm to 4:30pm	Pending	
<input type="checkbox"/>		Harvey, Derek	DC-20170613-2	Oct 5, 2017	4:30pm to 4:30pm	Pending	
<input checked="" type="checkbox"/>		Stark, Sansa	DC-20170706-1	Oct 5, 2017	4:30pm to 4:30pm	Pending	






HEARINGS - ICONS

While in the Hearings tab, Users can hover over a Client's row to reveal three icons on the far right side. Users can *complete a review* of the Clients in preparation of a Hearing, can mark the hearing as *complete* or mark the Clients as *missed* if they were not present for the Hearing.

<input type="checkbox"/>	Name	ID #	Date	Time	Status	Actions
<input type="checkbox"/>	 Class, Edgar	DC-20170719-1	Oct 5, 2017	4:30pm to 4:30pm	Pending	  
<input type="checkbox"/>	 Harvey, Derek	DC-20170613-2	Oct 5, 2017	4:30pm to 4:30pm	Pending	
<input type="checkbox"/>	 Stark, Sansa	DC-20170706-1	Oct 5, 2017	4:30pm to 4:30pm	Pending	

HEARINGS - COMPLETING A REVIEW

The Review icon allows Users to **complete a review** of the Clients prior the Hearing. The User completing the Review will be shown a list of all of the Client's achievements and infractions, as well as Milestone progress and case notes.

<input type="checkbox"/>	Name	ID #	Date	Time	Status	Actions
<input type="checkbox"/>	 Class, Edgar	DC-20170719-1	Oct 5, 2017	4:30pm to 4:30pm	Pending	<div>  </div>
<input type="checkbox"/>	 Harvey, Derek	DC-20170613-2	Oct 5, 2017	4:30pm to 4:30pm	Pending	

Review Hearing: Alvarado, James

1 REVIEW

Achievements

Infractions

Milestones

2 RECOMMENDATION

Rewards

Sanctions

Case Notes

Type	Date	Notes
Treatment Attended	Jan 15, 2019	

NEXT

HEARINGS - REVIEW RECOMMENDATIONS

At the end of the Review, Users have the ability to **review and assign Rewards or Sanctions** that should be applied, as well as make case notes. When applying Rewards and Sanctions, Users can view both Achievements and Infractions that have been unresolved/unrecognized that tie to the particular recommended Reward or Sanction. Both Rewards and Sanctions are managed (including policy recommendations for particular positive and negative behavior) within System Administration.

Review Hearing: Alvarado, James

1 REVIEW

Achievements

Infractions

Milestones

2 RECOMMENDATION

Rewards

Sanctions

Case Notes

Notes

Sanctions

Policy Recommended Sanctions

<input type="checkbox"/> Sanction	Infraction Policies
<input type="checkbox"/> Two (2) hours community service	Absence - 1st Offense - Miss meeting/fail to have proof of a support group meeting.
<input type="checkbox"/> Electronic monitoring	Failure To Appear - Failure to appear in court.
<input type="checkbox"/> Apology Letter	Absence - Have defendant write an apology letter for being absent.
<input type="checkbox"/> Reprimand	Absence - 1st Offense - Miss meeting/fail to have proof of a support group meeting.

All other sanctions

<input type="checkbox"/> Four (4) hours community service
<input type="checkbox"/> Six (6) hours community service
<input type="checkbox"/> Double community service requirement

TOPIC 8: CURFEW CHECK



Subtopics:

1. Overview
2. Filters
3. Curfew Check Report
4. Completing a Curfew Check

CURFEW CHECK - OVERVIEW

Once a Client has been given a Curfew Check Rule and frequency, that Client will display on the Curfew Check Task listing. The listing will display all clients with a Curfew Check requirement for your security location.








State of Louisiana > 11th JDC > Sabine > ADC

CANCEL
SAVE


Curfew Check Date *
06/07/2018

CHANGE STATUS

<input type="checkbox"/>	Client	Checks Per Week	Last Check Date	Address	Curfew	Status	Time Checked	Notes
<input type="checkbox"/>	 Conner, Alexis DUI-20161019-73	2	06/07/2018	123 E Maint St. Scottsdale, AZ 85251	8:00 pm - 5:00 am	Compliant	8:15 PM	 (1) 
<input type="checkbox"/>	 Phillips, Dan DUI-20180226-1	1	06/02/2018	203 N Sesame St. Scottsdale, AZ 85251	8:00 pm - 5:00 am	Not Checked	Time 	Notes
<input type="checkbox"/>	 Sellers, Valerie DC-20161019-73	1	06/02/2018	5365 E Evergreen Terrace Scottsdale, AZ 85251	11:00 pm - 5:00 am	Not Checked	Time 	Notes

Filters

Client Involvement



Caseload

☐ Default
☐ Community Service



Precinct

☐ Arcadia Biltmore
☐ Desert Ridge
☐ McDowell Mountain

CURFEW CHECK - FILTERS

Users can filter the listing by Caseload and/or by Precinct. Users can also search for a Client using the search bar.








State of Louisiana > 11th JDC > Sabine > ADC


CANCEL
SAVE

Curfew Check Date *
06/07/2018

CHANGE STATUS

<input type="checkbox"/>	Client	Checks Per Week	Last Check Date	Address	Curfew	Status	Time Checked	Notes
<input type="checkbox"/>	 Conner, Alexis DUI-20161019-73	2	06/07/2018	123 E Maint St. Scottsdale, AZ 85251	8:00 pm - 5:00 am	Compliant	8:15 PM	 (1) 
<input type="checkbox"/>	 Phillips, Dan DUI-20180226-1	1	06/02/2018	203 N Sesame St. Scottsdale, AZ 85251	8:00 pm - 5:00 am	Not Checked	Time 	Notes
<input type="checkbox"/>	 Sellers, Valerie DC-20161019-73	1	06/02/2018	5365 E Evergreen Terrace Scottsdale, AZ 85251	11:00 pm - 5:00 am	Not Checked	Time 	Notes

Filters

Client Involvement




Caseload
☐ Default
☐ Community Service

Precinct
☐ Arcadia Biltmore
☐ Desert Ridge
☐ McDowell Mountain

CURFEW CHECK - CURFEW CHECK REPORT

Users are able to generate and print a report that can be used in the field during Curfew Checks. The report will generate the listing based on the filters the User has selected. To print the report, Users click on the printer icon.








State of Louisiana > 11th JDC > Sabine > ADC

CANCEL
 SAVE


Curfew Check Date *
 06/07/2018

CHANGE STATUS

<input type="checkbox"/>	Client	Checks Per Week	Last Check Date	Address	Curfew	Status	Time Checked	Notes
<input type="checkbox"/>	 Conner, Alexis DUI-20161019-73	2	06/07/2018	123 E Maint St. Scottsdale, AZ 85251	8:00 pm - 5:00 am	Compliant	8:15 PM	 (1) 
<input type="checkbox"/>	 Phillips, Dan DUI-20180226-1	1	06/02/2018	203 N Sesame St. Scottsdale, AZ 85251	8:00 pm - 5:00 am	Not Checked	Time 	Notes
<input type="checkbox"/>	 Sellers, Valerie DC-20161019-73	1	06/02/2018	5365 E Evergreen Terrace Scottsdale, AZ 85251	11:00 pm - 5:00 am	Not Checked	Time 	Notes

Filters

Client Involvement



Caseload



☐ Default
☐ Community Service

Precinct

☐ Arcadia Biltmore
☐ Desert Ridge
☐ McDowell Mountain

CURFEW CHECK - CURFEW CHECK REPORT

After the User clicks on the print icon, a report will generate in a new browser tab.

Curfew Check for 06/07/2018							Louisiana 11th JDC DUI Court
Caseload All		Precinct Arcadia Biltmore		Client All			
Client	Checks Per Week	Last Check Date	Address/Phone	Curfew	Status	Time Checked	Notes
 Conner, Alexis DUI-20161019-73 Female	2	06/07/2018	123 E Maint St. Scottsdale, AZ 85251 555-555-1234	8:00 pm - 5:00 am	<input type="checkbox"/> Compliant <input type="checkbox"/> Missed <input type="checkbox"/> Excused		
 Phillips, Dan DUI-20180226-1 Male	1	06/02/2018	203 N Sesame St. Scottsdale, AZ 85251 555-555-5555	8:00 pm - 5:00 am	<input type="checkbox"/> Compliant <input type="checkbox"/> Missed <input type="checkbox"/> Excused		

CURFEW CHECK - COMPLETING A CURFEW CHECK


Users can record the outcome of their Curfew Check from the listing view. The status options are: Not Checked, Complaint, Missed, or Excused. Users can also edit a saved Curfew Check by clicking on the pen icon.

State of Louisiana > 11th JDC > Sabine > ADC

CANCEL **SAVE**

Curfew Check Date *
 06/07/2018

CHANGE STATUS

<input type="checkbox"/>	Client	Checks Per Week	Last Check Date	Address	Curfew	Status	Time Checked	Notes
<input type="checkbox"/>	Conner, Alexis DUI-20161019-73	2	06/07/2018	123 E Maint St. Scottsdale, AZ 85251	8:00 pm - 5:00 am	Compliant	8:15 PM	<div>  (1) </div>
<input type="checkbox"/>	Phillips, Dan DUI-20180226-1	1	06/02/2018	203 N Sesame St. Scottsdale, AZ 85251	8:00 pm - 5:00 am	Not Checked	Time	Notes
<input type="checkbox"/>	Sellers, Valerie DC-20161019-73	1	06/02/2018	5365 E Evergreen Terrace Scottsdale, AZ 85251	11:00 pm - 5:00 am	Not Checked	Time	Notes

Filters

Client Involvement

Caseload

☐ Default
☐ Community Service

Precinct

☐ Arcadia Biltmore
☐ Desert Ridge
☐ McDowell Mountain

TOPIC 9: TREATMENT/EDUCATION ATTENDANCE

Subtopics:

1. Overview
2. Marking Attendance
3. Enroll Clients
4. Batch Session Notes

TREATMENT/EDUCATION ATTENDANCE - OVERVIEW

Clicking on the **Treatment/Education Attendance** task option will allow Users to record attendance and/or enroll Clients into a Program. This functionality supports batch session notes and batch attendance.

Arizona ▾

Program ↑

Enrolled Clients

Generic Recovery Program	112
--------------------------	-----

← Treatment/Education Attendance

Generic Recovery Program

CANCEL

SAVE

Session Details

Session Date *

1/15/2019

Session Type *

Session Length *

hours

Enrolled Clients

ENROLL CLIENTS

ADD SESSION NOTES

⊖

<input type="checkbox"/>	Client ↑	Involvement	Status	Notes
Select a session date and type to see enrolled clients.				

TREATMENT/EDUCATION ATTENDANCE - MARKING ATTENDANCE

Once Users have selected the desired Program, they can mark attendance for all enrolled Clients. The User must select a Session Date, Session Type, and Session Length. The attendance status is defaulted to 'Attended'. For all enrolled Clients. Users can adjust the status manually, per Client. Users can also add notes to each Client, as needed.

← Treatment/Education Attendance
Generic Recovery Program
CANCEL
SAVE

Session Details



Session Date *
1/15/2019

Session Type *
Counseling

Session Length *
1 hours

Enrolled Clients

ENROLL CLIENTS
ADD SESSION NOTES

<input type="checkbox"/>	Client ↑	Involvement	Status	Notes
<input type="checkbox"/>	 Alvarado, James 111	MHC-20181127-74	<input checked="" type="radio"/> Attended <input type="radio"/> Missed <input type="radio"/> Excused	Notes
<input type="checkbox"/>	 Ann, Kristy 34	MHC-20170726-21	<input checked="" type="radio"/> Attended <input type="radio"/> Missed <input type="radio"/> Excused	Notes

TREATMENT/EDUCATION ATTENDANCE - MARKING ATTENDANCE

If the Client has already been marked for attendance for the same day and same session type, the User is presented with a warning icon.

← Treatment/Education Attendance
Generic Recovery Program
CANCEL
SAVE

Session Details





Session Date *
1/15/2019

Session Type *
Counseling

Session Length *
1 hours

Enrolled Clients

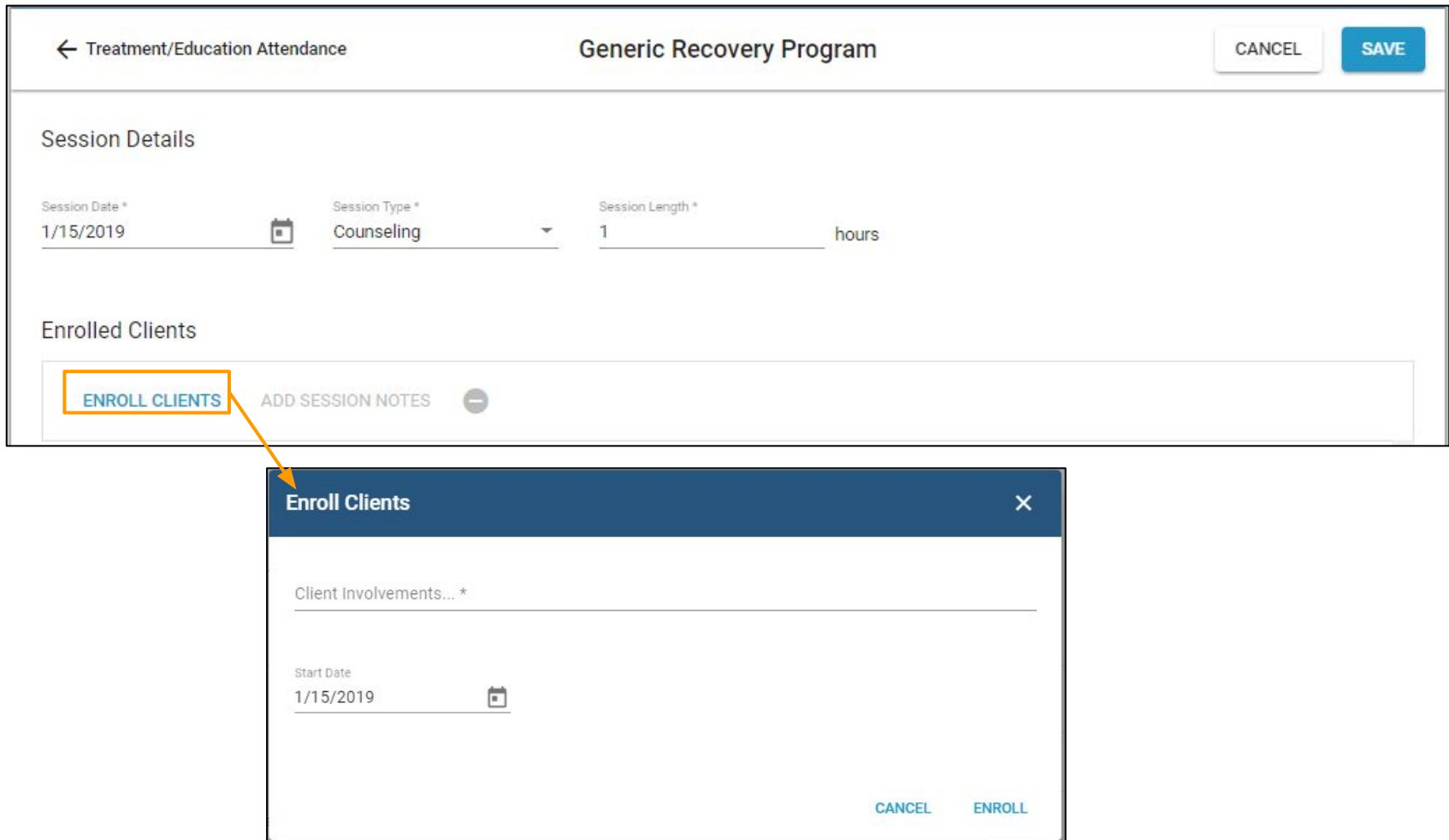
ENROLL CLIENTS
ADD SESSION NOTES

<input type="checkbox"/>	Client ↑	Involvement	Status		Notes
<input type="checkbox"/>	 Alvarado, James 111	MHC-20181127-74	<input checked="" type="radio"/> Attended <input type="radio"/> Missed <input type="radio"/> Excused		<input type="text"/>
<input type="checkbox"/>	 Ann, Kristy 34	MHC-20170726-21	<input checked="" type="radio"/> Attended <input type="radio"/> Missed <input type="radio"/> Excused		<input type="text"/>

This client involvement already has attendance logged for this session type and date. Logging attendance here will create another attendance entry.

TREATMENT/EDUCATION ATTENDANCE - ENROLL CLIENTS

Users can also Enroll Clients from the attendance screen by clicking on the *Enroll Clients* link. Users can enroll Clients from the Client's Involvement profile, as well.



The screenshot shows the 'Treatment/Education Attendance' screen for a 'Generic Recovery Program'. The 'Session Details' section includes fields for 'Session Date *' (1/15/2019), 'Session Type *' (Counseling), and 'Session Length *' (1 hours). Below this is the 'Enrolled Clients' section, which contains a link labeled 'ENROLL CLIENTS' (highlighted with an orange box and arrow), 'ADD SESSION NOTES', and a minus icon. An 'Enroll Clients' modal is open, featuring a dark blue header with a close button, a text input field for 'Client Involvements... *', a 'Start Date' field (1/15/2019), and 'CANCEL' and 'ENROLL' buttons at the bottom right.

← Treatment/Education Attendance Generic Recovery Program CANCEL SAVE

Session Details

Session Date * Session Type * Session Length *
1/15/2019 Counseling 1 hours

Enrolled Clients

ENROLL CLIENTS ADD SESSION NOTES −

Enroll Clients ×

Client Involvements... *

Start Date
1/15/2019

CANCEL ENROLL

TREATMENT/EDUCATION ATTENDANCE - BATCH SESSION NOTES

Users have the ability to enter Batch Session Notes when marking attendance. Once the User selects at least one client, the 'Add Session Notes' hyperlink is enabled.

← Treatment/Education Attendance
Generic Recovery Program
CANCEL
SAVE

Session Details


Session Date *
 1/15/2019

Session Type *
 Counseling

Session Length *
 1 hours

Enrolled Clients

ENROLL CLIENTS
ADD SESSION NOTES
−

	Client ↑	Involvement	Status	Notes
<input checked="" type="checkbox"/>	 Alvarado, James 111	MHC-20181127-74	<input checked="" type="radio"/> Attended <input type="radio"/> Missed <input type="radio"/> Excused 	Client did well. //
<input checked="" type="checkbox"/>	 Ann, Kristy 34	MHC-20170726-21	<input checked="" type="radio"/> Attended <input type="radio"/> Missed <input type="radio"/> Excused 	Notes //

×

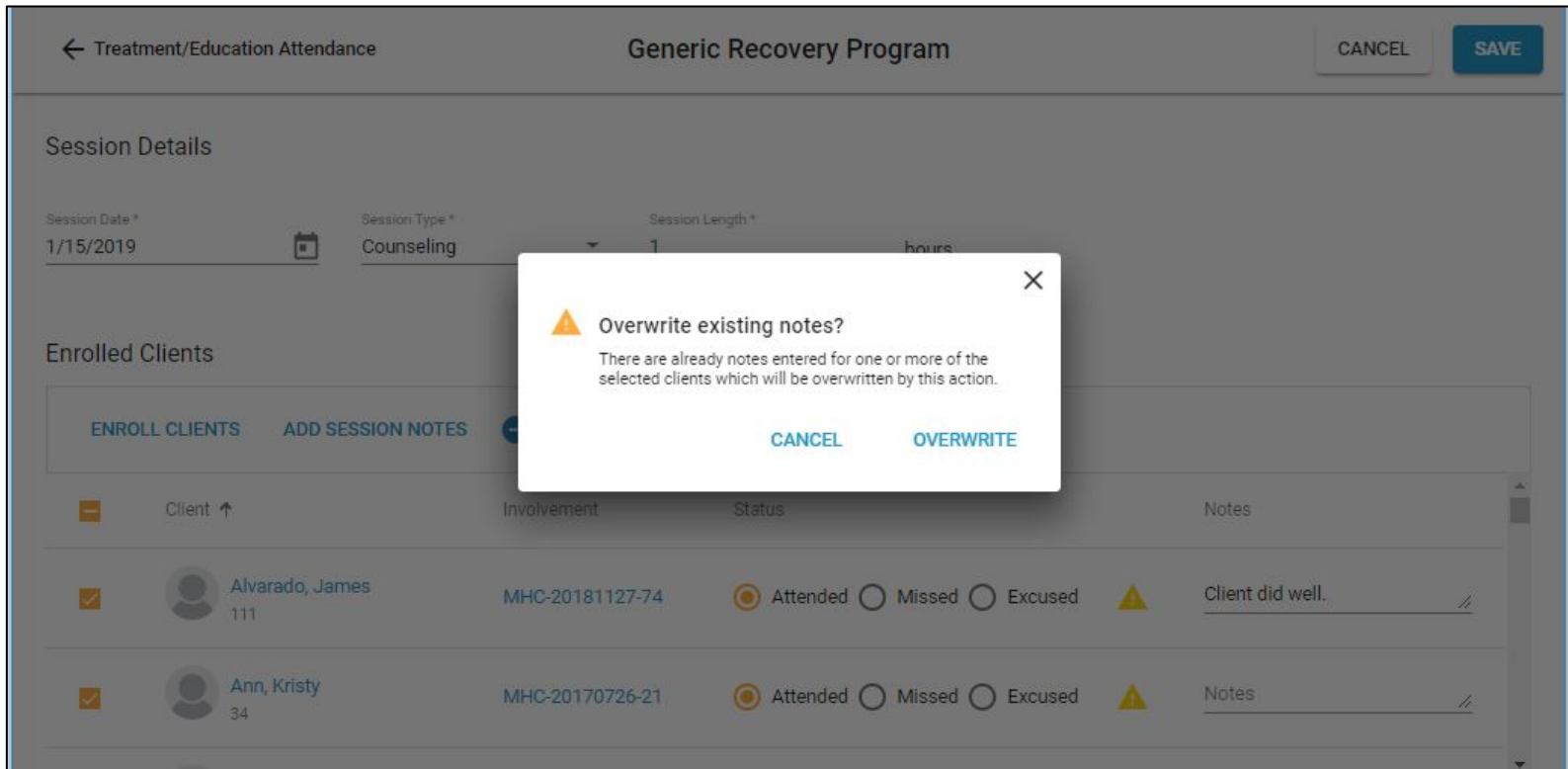
Notes *

Everyone worked well together in today's session.

CANCEL
ADD

TREATMENT/EDUCATION ATTENDANCE - BATCH SESSION NOTES

Users will be presented with an Overwrite confirmation dialog if the User enters a batch session note on a Client that already has a session note for that specific attendance.



The screenshot displays the 'Treatment/Education Attendance' interface for the 'Generic Recovery Program'. A confirmation dialog is overlaid on the screen, asking 'Overwrite existing notes?' with the message: 'There are already notes entered for one or more of the selected clients which will be overwritten by this action.' The dialog has 'CANCEL' and 'OVERWRITE' buttons. In the background, the 'Session Details' section shows 'Session Date *' as 1/15/2019, 'Session Type *' as Counseling, and 'Session Length *' as 1 hour. The 'Enrolled Clients' section includes buttons for 'ENROLL CLIENTS' and 'ADD SESSION NOTES'. Below these, a table lists clients with their involvement, status, and notes.

Client	Involvement	Status	Notes
Alvarado, James 111	MHC-20181127-74	<input checked="" type="radio"/> Attended <input type="radio"/> Missed <input type="radio"/> Excused	Client did well.
Ann, Kristy 34	MHC-20170726-21	<input checked="" type="radio"/> Attended <input type="radio"/> Missed <input type="radio"/> Excused	Notes















TOPIC 10: SPECIALTY COURTS

Subtopics:

1. Overview
2. Referred
3. Awaiting Intake
4. Admitted
5. All





SPECIALTY COURTS - OVERVIEW

Users can click on the **Specialty Courts** icon in order to navigate to the Specialty Courts listing views. Users can also add an involvement from this screen. The New Involvement will be covered in more detail later in this guide.

<div>       </div> <div> <input type="text" value="Search for Involvement"/> </div> <div>      </div>							
<div> Arizona ▾ </div>							
<div> <div>REFERRED</div> <div>AWAITING INTAKE</div> <div>ADMITTED</div> <div>ALL</div> </div>							
ADD INVOLVEMENT							
Involvement	Client	Court/Judge	Referral Date	In Custody?	Phone #	Documents	Assessments
DC-20171110-136	 Alicia, Pratt 129	Drug Court 1	11/10/2017 (431 days)	No		0	0
DC-20170312-120	 Alvarez, Wallace 139	Drug Court 1	3/12/2017 (674 days)	No		0	0
DC-20171016-137	 Bell, Young 83	Drug Court 1	10/16/2017 (456 days)	No		0	0

SPECIALTY COURTS - REFERRED

The **Referred** listing will display all Clients who are currently in a referred status. The involvement hyperlink will redirect Users to the involvement overview. The Client Name hyperlink will redirect the user to the Client's Overview. On the far right side is the More icon which allows Users to *Approve* or *Deny* the referral and/or add an assessment.

<div> <div>REFERRED</div> <div>AWAITING INTAKE</div> <div>ADMITTED</div> <div>ALL</div> </div>							
ADD INVOLVEMENT							
Involvement	Client	Court/Judge	Referral Date	In Custody?	Phone #	Documents	Assessments
DC-20171110-136	 Alicia, Pratt 129	Drug Court 1	11/10/2017 (431 days)	No		0	0
DC-20170312-120	 Alvarez, Wallace 139	Drug Court 1	3/12/2017 (674 days)	No		0	
DC-20171016-137	 Bell, Young 83	Drug Court 1	10/16/2017 (456 days)	No		0	
DC-20180609-134	 Christie, Pratt 146	Drug Court 1	6/9/2018 (220 days)	No		0	

☒ Approve Referral
☐ Deny Referral
☐ Add Assessment









SPECIALTY COURTS - AWAITING INTAKE

Once a Client's referral has been approved, the Client's status changes from Referred to *Awaiting Intake* and the Client is moved to the **Awaiting Intake** listing. The More icon on the right allows Users to Schedule Intake, Complete Intake, or Terminate the Involvement.

REFERRED	AWAITING INTAKE	ADMITTED	ALL				
Involvement	Client	Court/Judge	Approved Date	Phone #	Scheduled		
DC-20160804-144	 Allen, Francis 47	Drug Court 1	08/04/2016		01/15/2019 10:49PM		
DC-20181215-149	 Bryant, Murray 140	Drug Court 1	12/15/2018		01/21/2019 6:		Schedule Intake
DC-20180722-145	 Devin, Lawson 98	Drug Court 1	07/22/2018		01/16/2019 1:		Complete Intake
DC-20170725-150	 Jason, Cecilia 134	Drug Court 1	07/25/2017		01/17/2019 11:36PM		Terminate
DC-20181127-143	 Jerald, Padilla	Drug Court 1	11/27/2018		01/22/2019 1:13AM		





SPECIALTY COURTS- ADMITTED

Once the Client has a completed intake, the Client record is moved to the **Admitted** listing. This listing shows more detail regarding the Involvement such as: Caseload, Admitted Date, Track, and Phase. The More icon allows the User to Suspend or Terminate the Client's involvement.

REFERRED	AWAITING INTAKE	ADMITTED	ALL				
Involvement	Client	Court/Judge	Caseload	Admitted Date	Track	Phase	
MHC-20180412-13	 Alfred, Georgia 70	Mental Health Court 1	Arizona	04/12/2018	Default	Stabilization	
MHC-20181127-74	 Alvarado, James 111	Mental Health Court 1	Arizona	11/27/2018	Default	Stabilization	 Suspend
MHC-20170726-21	 Ann, Kristy 34	Mental Health Court 1	Arizona-1-Caseload-2	07/26/2017	Default	Stabilization	 Terminate
MHC-20160915-2	 Ann, Miguel	Mental Health Court 1	Arizona-1-Caseload-2	09/15/2016	Default	Stabilization	

SPECIALTY COURTS- ALL

The **All** listing will display all Clients and their status. The More icon will reflect the appropriate options based on the Client's status. Involvements that have been terminated will not display the More icon.

REFERRED	AWAITING INTAKE	ADMITTED	ALL		
ADD INVOLVEMENT					
Involvement	Client ↑	Court/Judge	Caseload	Status	Status Date
MHC-20180501-64	 Monica, Sheri 26	Mental Health Court 1	Arizona	Admitted	05/01/2018
MHC-20170327-87	 Montgomery, Jacquelyn 80	Mental Health Court 1	Arizona	Admitted	03/27/2017
DC-20180816-133	 Morales, Benny 61	Drug Court 1	Arizona	Referred	08/16/2018
MHC-20180221-29	 Morrison, Lillie 17	Mental Health Court 1	Arizona-1-Caseload-2	Terminated	01/15/2019

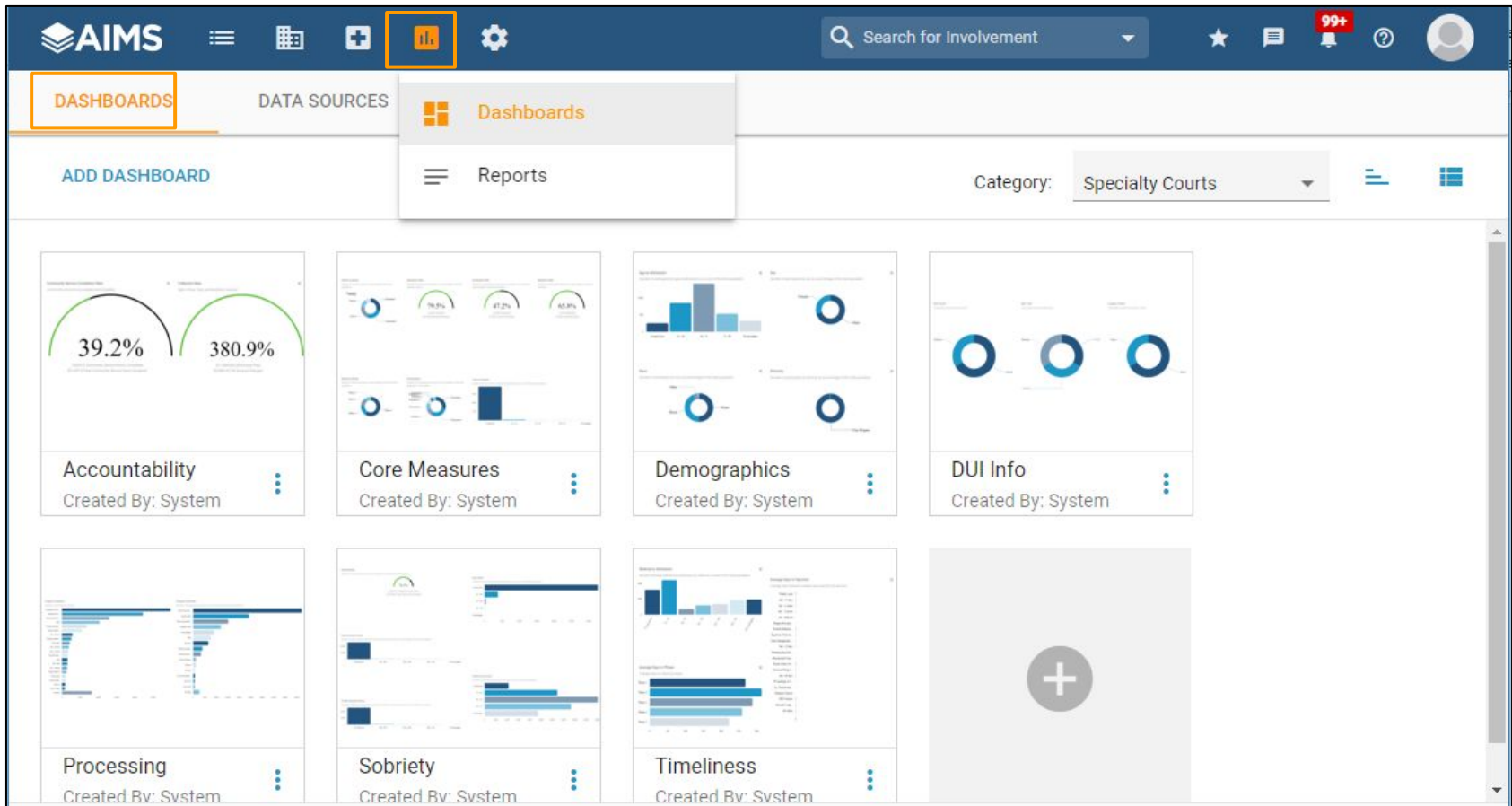
TOPIC 11: REPORTING

Subtopics:

1. Dashboards
2. Datasources
3. Exporting Data
4. Reports

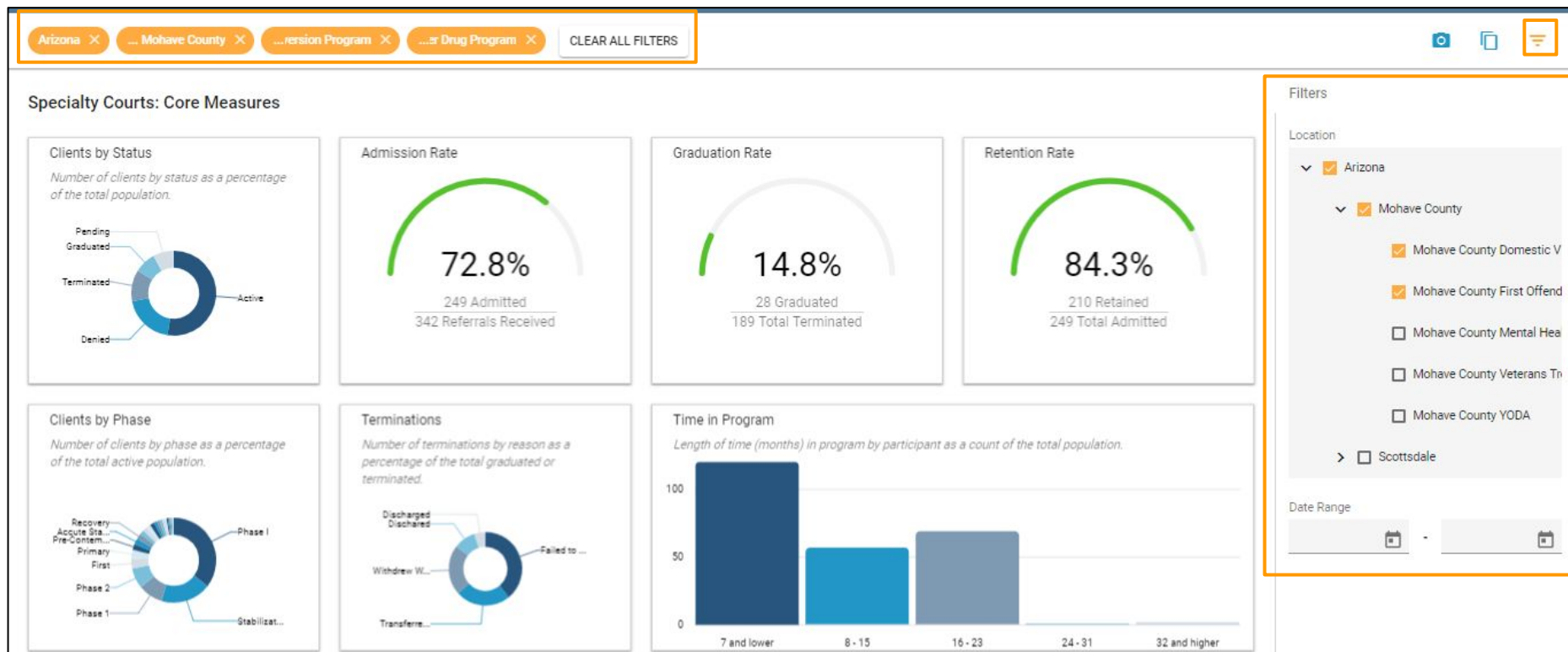
REPORTING - DASHBOARDS

To view Dashboards and Reports, click on the *Reporting* icon. Within the Specialty Courts Category, there are several system Dashboards that provide core metrics such as: Admission Rate, Time in Program, Graduation Rate, Sobriety Rate, and much more.



REPORTING - DASHBOARD

Each Specialty Court Dashboard provides Filtering options, located under the Filter icon on the top right of the screen. By default, the data on the Dashboard will not be filtered, but will show data for all locations where a User has the Data Analysis role. **Note:** A User must be assigned to a location with the Data Analysis role in order to see data related to that location (includes child locations). To filter data, click the (filter) toggle button. You can filter by location or date range.





REPORTING - DATA SOURCES

Data Sources are the engine that drive AIMS' Dashboard features. Click the *Data Sources* tab to see the list of available Data Sources. Note: Data Sources are designed and maintained by AutoMon. If you would like to see additional Data Sources or changes to existing Data Sources, please contact AutoMon Support.

<div> DASHBOARDS <div>DATA SOURCES</div> </div>				
<div> <div>Download</div> <div>Refresh</div> </div>		Category: Specialty Courts		
<input type="checkbox"/>	Source ↑	Description	Number of Records	Last Refreshed Date
<input type="checkbox"/>	Accountability	Accountability data including community service and financial obligations.	430	01/15/2019 10:08 PM
<input type="checkbox"/>	Active Involvements	All active specialty court involvements	202	01/15/2019 10:08 PM
<input type="checkbox"/>	Admitted Involvements	All specialty court involvements that were admitted	279	01/15/2019 10:08 PM
<input type="checkbox"/>	All Involvements	All specialty court involvements, including non-admitted clients	394	01/15/2019 10:08 PM
<input type="checkbox"/>	DUI Info	DUI information related to a specialty court involvement	61	01/15/2019 10:08 PM
<input type="checkbox"/>	Incentives	Basic incentive information, e.g., incentive type, date, etc.	240	01/15/2019 10:08 PM
<input type="checkbox"/>	Phases	Basic phase information, e.g., phase name, days in phase, etc.	437	01/15/2019 10:08 PM
<input type="checkbox"/>	Referrals	All specialty court referrals	394	01/15/2019 10:08 PM
<input type="checkbox"/>	Sanctions	Basic sanction information, e.g., sanction type, date, days to sanction, etc.	1,680	01/15/2019 10:09 PM
<input type="checkbox"/>	Sobriety	Sobriety details including tests administered, positive tests, initial sobriety period, and current sobriety period.	430	01/15/2019 10:08 PM
<input type="checkbox"/>	Terminations	All specialty court involvements admitted and terminated, including graduated.	198	01/15/2019 10:08 PM

REPORTING - EXPORTING DATA

Similar to Dashboards, Data Sources are organized into categories. Data Sources can be downloaded for analysis in external tools; check one or more Data Sources and click the *Download* icon. The system will generate a .CSV file and prompt the User to download a file for each Data Source selected.

DASHBOARDS		DATA SOURCES		
 		Category: Specialty Courts ▾		
Source	Description	Number of Records	Last Refreshed Date	
<input type="checkbox"/> Accountability	Accountability data including community service and financial obligations.	430	01/15/2019 10:08 PM	
<input checked="" type="checkbox"/> Active Involvements	All active specialty court involvements.	202	01/15/2019 10:08 PM	
<input type="checkbox"/> Admitted Involvements	All specialty court involvements that were admitted	279	01/15/2019 10:08 PM	
<input type="checkbox"/> All Involvements	All specialty court involvements, including non-admitted clients	394	01/15/2019 10:08 PM	
<input type="checkbox"/> DUI Info	DUI information related to a specialty court involvement	61	01/15/2019 10:08 PM	
<input checked="" type="checkbox"/> Incentives	Basic incentive information, e.g., incentive type, date, etc.	240	01/15/2019 10:08 PM	
<input checked="" type="checkbox"/> Phases	Basic phase information, e.g., phase name, days in phase, etc.	437	01/15/2019 10:08 PM	
<input type="checkbox"/> Referrals	All specialty court referrals	394	01/15/2019 10:08 PM	
<input checked="" type="checkbox"/> Sanctions	Basic sanction information, e.g., sanction type, date, days to sanction, etc.	1,680	01/15/2019 10:09 PM	
<input checked="" type="checkbox"/> Sobriety	Sobriety details including tests administered, positive tests, initial sobriety period, and current sobriety period.	430	01/15/2019 10:08 PM	
<input type="checkbox"/> Terminations	All specialty court involvements admitted and terminated, including graduated.	198	01/15/2019 10:08 PM	

REPORTING - EXPORTING DATA

Users can also see the data from selected Data Sources from within the application. Click the number of records link to see the tabular data of a Data Source.

DASHBOARDS

DATA SOURCES

Download

Refresh

Category: Specialty Courts

<div><div></div></div> Source <div>↑</div>	Description	Number of Records	Last Refreshed Date
<div><div></div></div> Accountability	Accountability data including community service and financial obligations.	430	01/15/2019 10:08 PM
<div><div></div></div> Active Involvements	All active specialty court involvements	202	01/15/2019 10:08 PM

Active Involvements

Involvement ID	Client Name	Client ID	DOB	Sex	Race	Ethnicity
DC-20151106-1	Johnson, Katherine	200147	10/14/1988	Female	White	Non-Hispanic
DC-20160105-1	Test, AutoMon	257	03/06/1981	Female	Unknown	Non-Hispanic
DC-20160527-2	Turner, William	200086	12/13/1994	Male	White	Non-Hispanic
DC-20160927-1	Jones, Jack	200141	09/13/2000	Male	Unknown	Non-Hispanic
DC-20170131-1	Black, Jimmy	174	04/22/1991	Male	White	Non-Hispanic
DC-20170208-1	Watts, William	175	08/21/1991	Male	Black	Non-Hispanic
DC-20170215-1	Jackson, Amy	176	02/02/1987	Female	Black	Non-Hispanic
DC-20170221-1	Oshida, Joseph	177	05/24/1966	Male	Pacific Islander	Non-Hispanic
DC-20170412-1	Masters, Phil	173	07/29/1992	Male	White	Non-Hispanic
DC-20170504-1	Gallagher, Mike	160	09/12/1992	Male	White	Non-Hispanic
DC-20170504-2	Wilford, Jonathan	166	09/09/1988	Male	White	Non-Hispanic
DC-20170504-3	Maddiger, Rachel	168	05/18/1999	Female	Pacific Islander	Non-Hispanic

Items per page: 25 1 - 25 of 202

REPORTING - REPORTS

Under the Reports section, AIMS currently provides the *Received Payments* report. This report allows Users to generate an accounting report that can be filtered by date range, Obligation Type, and Location.

Received Payments
The payments received within a specified time period grouped by obligation type.

Filters

Date Range *

-

Obligation Type *

☒ All

☒ Community Service Fees

☒ Drug Testing Fee

☒ Program Fee

☒ Restitution

☒ Tarrant Domestic Violence Monthly F...

☒ Tarrant FODP Program Fee-Felony

☒ Tarrant FODP-MISD

☒ Tarrant YODA Drug Testing Fee

Location *

☐ All

☐ Arizona

☐ Arizona > Mohave County

☐ Arizona > Mohave County > Mohave

CLEAR

RUN REPORT

Enter the filter criteria on the left and click Run Report.

REPORTING - REPORTS

Once the filter criteria has been selected, click on the *Run Report* button; the .PDF of the report will then generate. Users can view, download, or print the report.

Received Payments

The payments received within a specified time period grouped by obligation type.

Filters

Date Range *
1/1/2019 - 1/15/2019

Obligation Type *
☒ All
☒ Community Service Fees
☒ Drug Testing Fee
☒ Program Fee
☒ Restitution
☒ Tarrant Domestic Violence Monthly F...
☒ Tarrant FODP Program Fee-Felony
☒ Tarrant FODP-MISD.
☒ Tarrant YODA Drug Testing Fee

Location *
☒ All
☒ Arizona
☒ Arizona > Mohave County
☐ Arizona > Mohave County > Mohave

CLEAR

RUN REPORT

ReceivedPayments

1 / 2

AutoMon LLC

Received Payments

Drug Testing Fee

Receipt #	Payment Date	Involvement ID	Payment Method	Amount
100201	01/15/2019	DC-20180625-1	Cash	\$10.00
Drug Testing Fee Total				\$10.00

Program Fee

Receipt #	Payment Date	Involvement ID	Payment Method	Amount
100200	01/15/2019	DC-20170709-1	Credit Card	\$25.00
Program Fee Total				\$25.00

Grand Total

\$35.00

TOPIC 12: CLIENT'S PROFILE

Subtopics:

1. Overview
2. Personal Info
3. Contact Info
4. Employment/Income
5. Education
6. Military
7. Clinical info
8. Drug Use
9. Associates
10. TANF


CLIENT'S PROFILE - OVERVIEW

A Client's **Profile** displays the Client's Information, Criminal History, Involvement History, Involvement overview, and Involvement-specific actions and tasks. AIMS is Client-centric, therefore, all Involvement history is linked to one single Client record. A User can upload a photo by clicking on the image silhouette.

Specialty Court

Napier, Jack

151



Client Info

Criminal History

Involvement History

Involvement DC-20181101-1

Activities

Surveys, Assessments & Goals

Supervision

Treatment/Education Attendance

Accounting

Community Service

Notes

Documents & Forms

Tasks

PERSONAL INFO

CONTACT INFO

EMPLOYMENT/INCOME

EDUCATION

MILITARY

CLINICAL INFO

DRUG USE

ASSOCIATES

TANF

Demographics

ID #

Name

Aliases

151

Napier, Jack

DOB

Age

Sex

Race

Hispanic Origin

01/15/1981

38

Male

White

No

Identifiers

Driver's License #

Driver's License State

SSN

State ID #

Physical Description

Height

Weight

Hair Color

Eye Color

Body Marks

CLIENT INFO - PERSONAL INFO

In the Personal Info tab of the Client Info section, Users can view, add, or edit specific personal data regarding the Client such as: Demographics, Identifiers, and Physical Description. Clicking on the pen icon will allow Users to add/edit the section.

Napier, Jack

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Client Info

Criminal History

Involvement History

Involvement DC-20181101-1

Activities

Surveys, Assessments & Goals

Supervision

Treatment/Education Attendance

Accounting

Community Service

Notes

Documents & Forms

Tasks

PERSONAL INFO

CONTACT INFO

EMPLOYMENT/INCOME

EDUCATION

MILITARY

CLINICAL INFO

DRUG USE

ASSOCIATES

TANF

Demographics

ID #

Name

Aliases

151

Napier, Jack

DOB

Age

Sex

Race

Hispanic Origin

01/15/1981

38

Male

White

No

Identifiers

Driver's License #

Driver's License State

SSN

State ID #

Physical Description

Height

Weight

Hair Color


Eye Color

Body Marks

CLIENT INFO - CONTACT INFO

In the Contact Info tab of the Client Info section, Users can view, add, or edit specific Contact data regarding the Client such as: Place of Residence, Addresses, and Phone number(s). Clicking on the pen icon will allow Users to edit the Place of Residence. Clicking on the Create button will allow Users to add an Address and/or Phone Number.

Napier, Jack
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Client Info

- Criminal History
- Involvement History
- Involvement DC-20181101-1
- Activities
- Surveys, Assessments & Goals
- Supervision
- Treatment/Education Attendance
- Accounting
- Community Service
- Notes

PERSONAL INFO **CONTACT INFO** EMPLOYMENT/INCOME EDUCATION MILITARY CLINICAL INFO DRUG USE ASSOCIATES TANF

Add Address

Type *
Work

6621 North Scottsdale Road

Line 2

City * State * Postal Code
Scottsdale AZ 85250

Start date End date ☒ Primary Address Precinct
Scottsdale

CANCEL **SAVE CHANGES**

CLIENT INFO - CONTACT INFO

To record the Police Precinct where the Client resides (used for curfew checks), Users must ensure that the address has been marked as **Primary**. Doing so will enable the Precinct drop down field.

Napier, Jack
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Client Info

Criminal History
Involvement History
Involvement DC-20181101-1
Activities
Surveys, Assessments & Goals
Supervision
Treatment/Education Attendance
Accounting
Community Service
Notes

PERSONAL INFO CONTACT INFO EMPLOYMENT/INCOME EDUCATION MILITARY CLINICAL INFO DRUG USE ASSOCIATES TANF

Add Address

Type *
Work

6621 North Scottsdale Road

Line 2

City *
Scottsdale

State *
AZ

Postal Code
85250

Start date

End date

☒ Primary Address

Precinct
Scottsdale

CANCEL

SAVE CHANGES

CLIENT INFO - EMPLOYMENT/INCOME

In the Employment/Income tab of the Client Info section, Users can view, add, or edit specific Employment and Income data regarding the Client such as: Employment Status, Total Monthly Income (calculated automatically based on active Employment and Income Sources), Employment details, and Income Sources. Clicking on the pen icon will allow Users to edit the Employment Status. Clicking on the 'Add' links will allow Users to add new data.

Napier, Jack

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Client Info

Criminal History
Involvement History
Involvement DC-20181101-1
Activities
Surveys, Assessments & Goals
Supervision
Treatment/Education Attendance
Accounting
Community Service
Notes
Documents & Forms

PERSONAL INFOCONTACT INFO**EMPLOYMENT/INCOME**EDUCATIONMILITARYCLINICAL INFODRUG USEASSOCIATESTANF

Summary

Employment Status

Not Available

Total Monthly Income

Not Available

Employment Details

ADD EMPLOYMENT

Employer Name	Position	Contact Name	Contact Number	Start Date	End Date	Monthly Income Amount	Comments
No employments found.							

Other Income Sources

ADD INCOME SOURCE


Income Source	Start Date	End Date	Monthly Income Amount	Comments
---------------	------------	----------	-----------------------	----------

CLIENT INFO - EDUCATION

In the Education tab of the Client Info section, Users can view, add, or edit specific Education data regarding the Client such as School history. Clicking on the 'Add' links will allow the user to add new data.

Napier, Jack

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PERSONAL INFO CONTACT INFO EMPLOYMENT/INCOME **EDUCATION** MILITARY CLINICAL INFO DRUG USE ASSOCIATES TANF

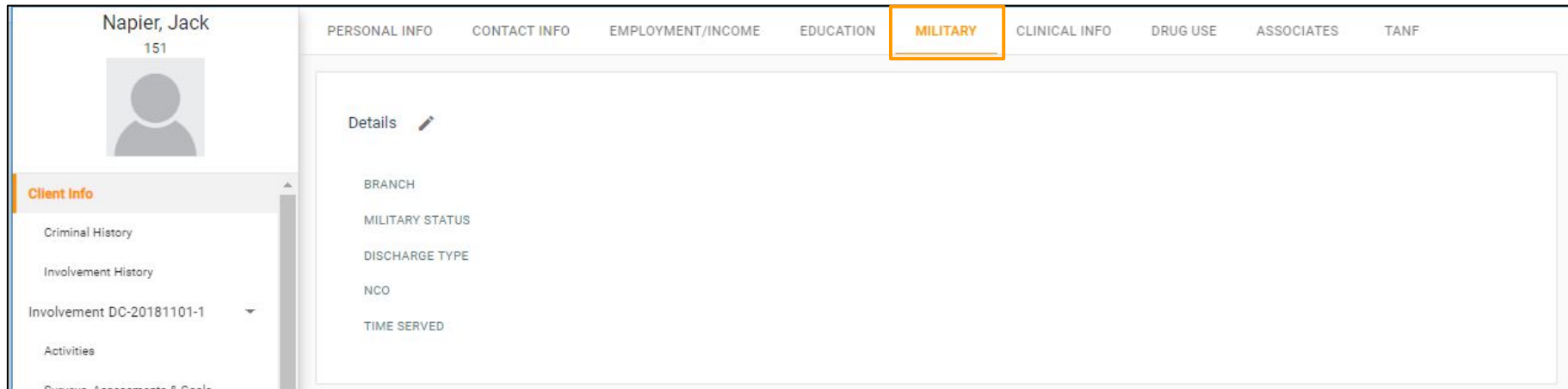
[ADD SCHOOL](#)

Education Level	School Name	Start Date	End Date	Degree/Diploma/Certification Earned	Comments
No schools found					


Client Info

CLIENT INFO - MILITARY

In the Military tab of the Client Info section, Users can view, add, or edit specific Military data regarding the Client such as: Branch, Military Status, Discharge Type, NCO, and Time Served. Clicking on the pen icon will allow Users to edit data.




The screenshot displays the 'Client Info' section for 'Napier, Jack' (ID 151). The 'MILITARY' tab is selected and highlighted with an orange border. The left sidebar shows the 'Client Info' menu with options: Criminal History, Involvement History, Involvement DC-20181101-1, Activities, and Surveys, Assessments & Goals. The main content area shows the 'Details' section with a list of military-related fields: BRANCH, MILITARY STATUS, DISCHARGE TYPE, NCO, and TIME SERVED. Each field has a corresponding input area for data entry.

PERSONAL INFO	CONTACT INFO	EMPLOYMENT/INCOME	EDUCATION	MILITARY	CLINICAL INFO	DRUG USE	ASSOCIATES	TANF
<p>Details </p> <p>BRANCH</p> <p>MILITARY STATUS</p> <p>DISCHARGE TYPE</p> <p>NCO</p> <p>TIME SERVED</p>								


CLIENT INFO - CLINICAL INFO

In the Clinical Info tab of the Client Info section, Users can view, add, or edit specific Clinical data regarding the Client such as: Insurance Information, Last Medical Exam Date, Diagnoses, Pregnancy (only if Client's gender is marked as Female) and Prescriptions. In this section, Users can check the Prescription Conflict with drug testing, if applicable to the Client. Clicking on the pen icon will allow the User to edit data. Clicking on the 'Add' link will allow the User to create new data.


PERSONAL INFO
CONTACT INFO
EMPLOYMENT/INCOME
EDUCATION
MILITARY
CLINICAL INFO
DRUG USE
ASSOCIATES
TANF

Insurance Information


Eligible for Medicaid	Health Insurance Provider	Policy Number	Last Medical Exam Date
Not Available	Not Available	Not Available	Not Available

Diagnoses


Diagnosed with Substance Use Disorder	Diagnosed with Mental Illness	
Not Available	Not Available	
Communicable Diseases	Allergies	
Not Available	Not Available	

Pregnancy


Currently Pregnant
Not Available

Prescriptions

[ADD PRESCRIPTION](#)

☐ One or more of these prescriptions could conflict with drug testing results

Prescription	Dosage	Comments
--------------	--------	----------

CLIENT INFO - DRUG USE

In the Drug Use tab of the Client Info section, Users can view, add, or edit specific Drug Use data regarding the Client such as: Primary Drug of Choice, Secondary Drug of Choice, and Age at Onset of Drug Use. Clicking on the pen icon will allow Users to edit data.

PERSONAL INFO	CONTACT INFO	EMPLOYMENT/INCOME	EDUCATION	MILITARY	CLINICAL INFO	DRUG USE	ASSOCIATES	TANF
---------------	--------------	-------------------	-----------	----------	---------------	-----------------	------------	------

Drug Use

Primary Drug of Choice

Not Available

Secondary Drug of Choice

Not Available

Age at Onset of Drug Use

Not Available




CLIENT INFO - ASSOCIATES

In the Associates tab of the Client Info section, Users can view, add, or edit specific Associate data regarding the Client. For children associates, Users must enter the Date of Birth. Clicking on the pen icon will allow Users to edit data. Clicking on the 'Add' link will allow Users to create new data.

PERSONAL INFO
CONTACT INFO
EMPLOYMENT/INCOME
EDUCATION
MILITARY
CLINICAL INFO
DRUG USE
ASSOCIATES
TANF

Associates


NAME	RELATIONSHIP	TAGS	DATE OF BIRTH	PHONE NUMBER	ADDRESS	COMMENTS
Jim Napier	Child	Closest Relative Lives with	01/08/2005			

CREATE

PERSONAL INFO
CONTACT INFO
EMPLOYMENT/INCOME
EDUCATION
MILITARY
CLINICAL INFO
DRUG USE
ASSOCIATES
TANF

Add Associate

Full Name *


Date of Birth

CLIENT INFO - TANF

In the TANF (Temporary Assistance to Needy Families) tab of the Client Info section, Users can view, add, or edit specific TANF data regarding the Client such as TANF Eligible and TANF Certification Date. Users are also presented with a hyperlink that will redirect them to the Associates page. This is to ensure that the User has entered dependent child/children associations. Clicking on the pen icon will allow Users to edit data.

PERSONAL INFO	CONTACT INFO	EMPLOYMENT/INCOME	EDUCATION	MILITARY	CLINICAL INFO	DRUG USE	ASSOCIATES	TANF
---------------	--------------	-------------------	-----------	----------	---------------	----------	------------	-------------

TANF Details

TANF Eligible
Yes

TANF Certification Date
01/01/2019

[Dependent Children Information](#)


TOPIC 13: CRIMINAL HISTORY

Subtopics:

1. Overview
2. Adding New Information

CLIENT'S PROFILE - CRIMINAL HISTORY

Users can view, add and edit Criminal History data within the Criminal History link. Data stored here include details about the criminal case such as: File date, case#, Jurisdiction, Court, Judge, Room, Probation Officer, Probation End Date, and charge information. Users can link criminal cases to specific involvement(s).



Napier, Jack

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Client Info

Criminal History

Involvement History

Involvement DC-20181101-1

Activities

Surveys, Assessments & Goals

Supervision

Treatment/Education Attendance

Accounting

Community Service

Notes

← Criminal History

CANCEL SAVE

Criminal Case Details

File Date * Case # * Jurisdiction * Court * Judge Room

Related Involvements Probation Officer Probation End Date

Comments

Charges

ADD CHARGE

Count	Charge	Classification	Qualifiers	Disposition	Comments
No charges found.					

TOPIC 14: INVOLVEMENT HISTORY

Subtopics:


1. Viewing Details

CLIENT'S PROFILE - INVOLVEMENT HISTORY

The **Involvement History** tab will display a read only view of all opened and closed Involvements that are linked to the specific Client.

Napier, Jack

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Client Info

Criminal History

Involvement History

Involvement DC-20181101-1

Activities

Surveys, Assessments & Goals

Supervision

Treatment/Education Attendance

Accounting

Community Service

Notes

Documents & Forms

Tasks 1

Involvement ID	Involvement Type	Opened	Closed
DC-20181101-1	Specialty Court	11/01/2018	


TOPIC 15: INVOLVEMENT OVERVIEW

Subtopics:

1. Multiple Involvements
2. Transferring Courts
3. Changing Caseloads
4. Curfew Checks
5. Involvement Warning
6. Transferring Tracks
7. Change Phase Status

INVOLVEMENT OVERVIEW - MULTIPLE INVOLVEMENTS

Users have the ability to switch between multiple Involvements on the same Client. Users can click the Orange arrow to view/switch to other involvements. Users can 'bookmark' an involvement by clicking on the Star icon. When doing so, the Client then appears under the User's Favorites listing.



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Client Info

Criminal History

Involvement History

Involvement: DC-20181101-1

DUI-20190102-1

✓ DC-20181101-1

Treatment/Education Attendance

Accounting

Community Service

Notes

Documents & Forms

Tasks

Involvement ID
DUI-20180226-1

Court/Judge
DUI Court

Caseload
Default

Curfew checks per week
None

Curfew Requirements
None

Sobriety Date
Awaiting Negative Test

Arrest
10/12/2018

✓ Referral
11/01/2018

✓ Approval/Denial
Approved: 11/07/2018

✓ Admitted
11/19/2018

Days In Program: 58

Phase History

Track	Phase	Status	Start Date	End Date	Days In Phase
Default	Stabilization	In Progress	11/19/2018	Earliest Promotion: 02/19/2019	58

Accounting

Current Amount Due
\$0.00

Total Amount Due
\$0.00

Community Service

0% Completed
0.0 hours remaining


Sanction History

No sanction history to display.

Reward History

INVOLVEMENT OVERVIEW - TRANSFER COURTS

In the scenario where a Client must be transferred to a different Court (i.e. Client has moved to another jurisdiction), Users have the ability to transfer the Client to another Court by clicking on the pen icon under the Court/Judge field. **Note: Users will need to have permissions to transfer Clients between courts.**



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Client Info

Criminal History

Involvement History

Involvement DC-20181101-1

DUI-20190102-1

✓ DC-20181101-1

Treatment/Education Attendance

Accounting

Community Service

Notes

Documents & Forms

Tasks

Involvement ID
DUI-20180226-1

Court/Judge
DUI Court

Caseload
Default

Curfew checks per week
None

Curfew Requirements
None

Sobriety Date
Awaiting Negative Test

Arrest
10/12/2018

✓ Referral
11/01/2018

✓ Approval/Denial
Approved: 11/07/2018

✓ Admitted
11/19/2018

Days In Program: 58

Phase History

Track	Phase	Status	Start Date	End Date	Days In Phase
Default	Stabilization	In Progress	11/19/2018	Earliest Promotion: 02/19/2019	58

Accounting

Current Amount Due
\$0.00

Total Amount Due
\$0.00

Community Service

0% Completed
0.0 hours remaining

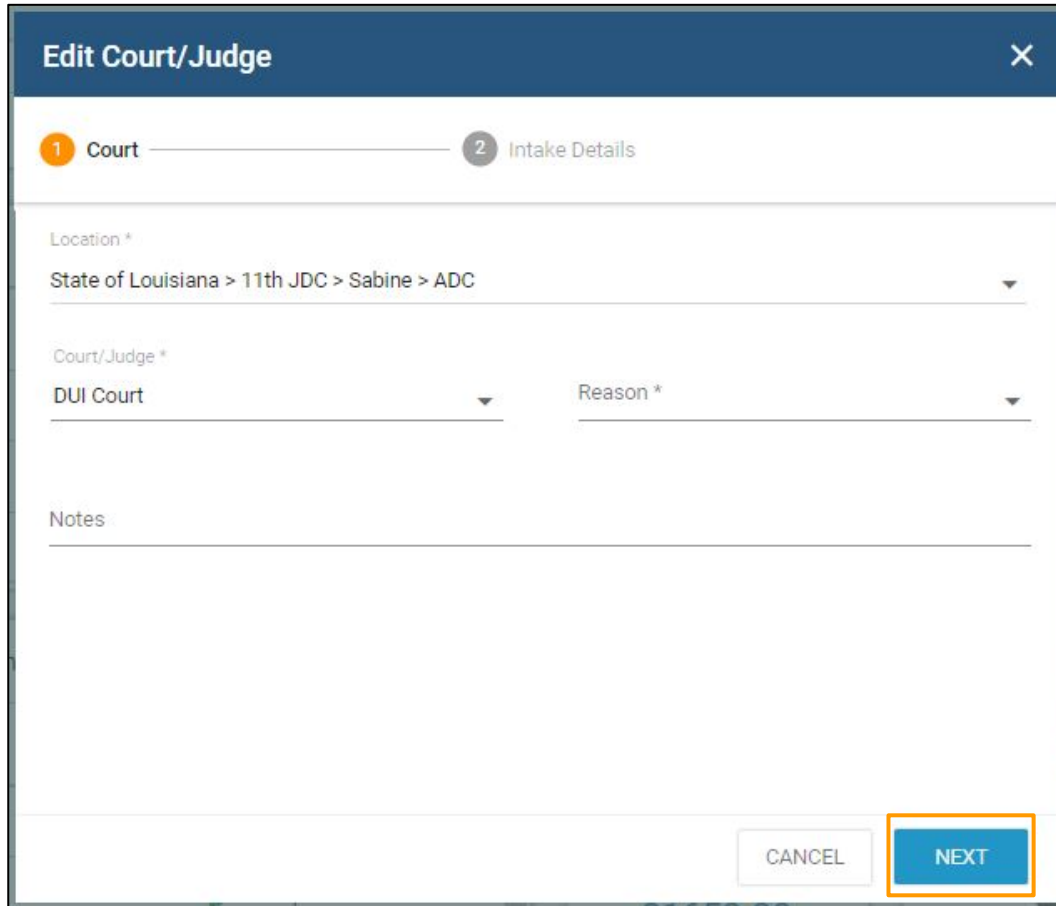
Sanction History

No sanction history to display.

Reward History

INVOLVEMENT OVERVIEW - TRANSFER COURTS

Once a User clicks on the pen icon, they will be presented with a two-step process to complete the transfer. The first step allows the User to select the Location, Court, Reason for transfer and enter a comment.



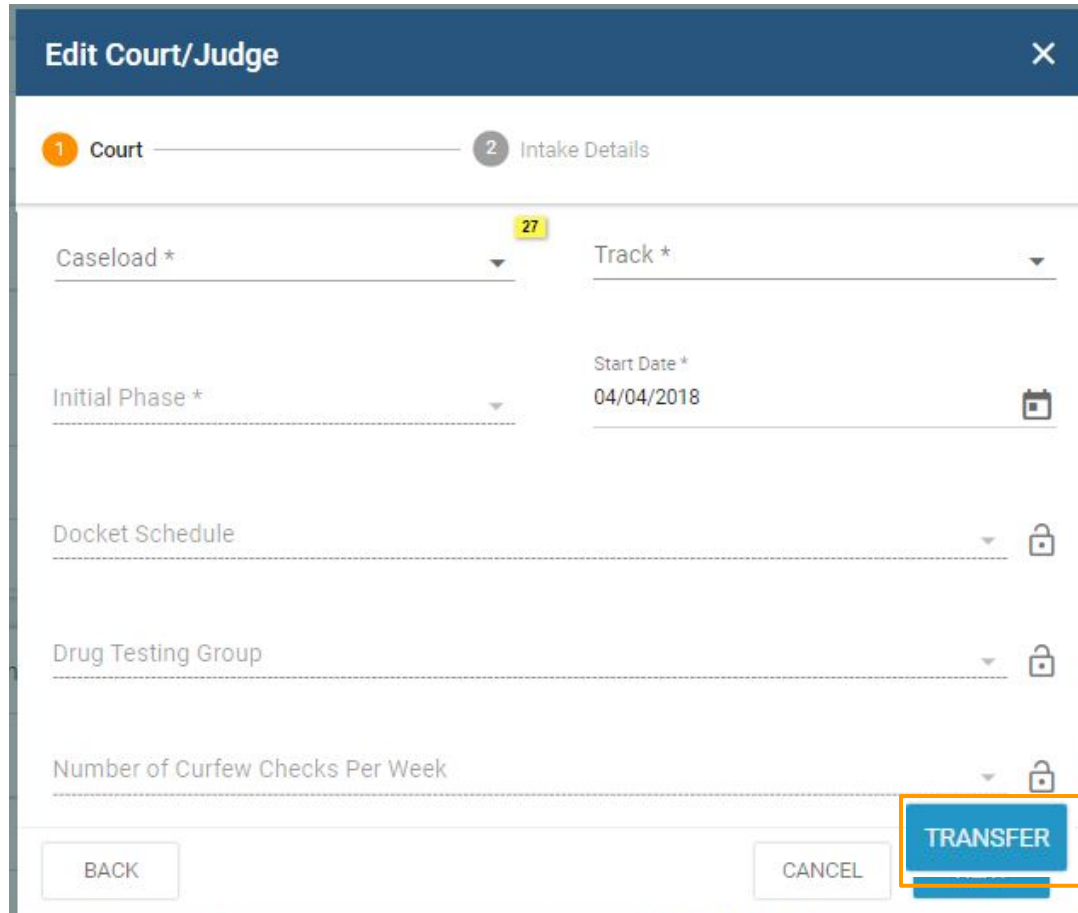
The screenshot shows a modal window titled "Edit Court/Judge" with a close button (X) in the top right corner. Below the title bar, there are two steps in a progress bar: "1 Court" (highlighted with an orange circle) and "2 Intake Details" (greyed out). The form contains the following fields:

- Location ***: A dropdown menu showing "State of Louisiana > 11th JDC > Sabine > ADC".
- Court/Judge ***: A dropdown menu showing "DUI Court".
- Reason ***: A dropdown menu.
- Notes**: A text area for entering comments.

At the bottom right of the form, there are two buttons: "CANCEL" and "NEXT". The "NEXT" button is highlighted with an orange border.

INVOLVEMENT OVERVIEW - TRANSFER COURTS

The next step allows the User to enter the intake details such as: Caseload, Track, Initial Phase, start date, Docket schedule, Drug Testing group, number of Curfew Checks per week.



Edit Court/Judge [X]

1 Court ————— 2 Intake Details

Caseload * [27] Track *

Initial Phase * Start Date * 04/04/2018

Docket Schedule

Drug Testing Group

Number of Curfew Checks Per Week


BACK CANCEL **TRANSFER**

INVOLVEMENT OVERVIEW - TRANSFER COURTS

Once the User has completed the Court transfer, the Phase History section on the overview will display that there was a Court transfer, where the Court transfer was from and why the transfer occurred. The days in Phase remain the same at the new Court.

Phase History

CHANGE PHASE STATUS

Track	Phase	Status	End Date	Days in Phase
Default 	Phase 2	 In Prog	Earliest Promotion: 04/30/2018	24
Adult	Recovery	 Transferred Courts 	01/26/2018	24
Adult	Stabilization	 Complete	01/12/2018	14

Transferred From

Court/Judge:

Caseload:

Reason:

DUI Court

Default


Client Moved





(1)

INVOLVEMENT OVERVIEW - CHANGING CASELOADS

In the event the Client is moved to another Caseload, Users have the ability to change Caseloads by clicking on the pen icon and selecting the new Caseload from the drop down list.

Napier, Jack
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Involvement ID DC-20181101-1	Court/Judge DUI Court 	Caseload Default 	Curfew checks per week: None 	Curfew Requirements None 	Sobriety Date Awaiting Negative Test
---------------------------------	--	--	---	---	---

Arrest
10/12/2018


Referral
11/01/2018


Approval/Denial
Approved: 11/07/2018

Admitted
11/19/2018 

Days In Program: 58

Phase History CHANGE PHASE STATUS ▾

Track	Phase	Status	Start Date	End Date	Days In Phase
Default 	Stabilization	In Progress	11/19/2018	Earliest Promotion: 02/19/2019	58



Caseload *





DUI Court-8-Caseload-1 ▾

CANCEL

SAVE

INVOLVEMENT OVERVIEW - CURFEW CHECKS

Users have the ability to indicate a Client's Curfew requirements and indicate the number of Curfew Checks per week for the Client. System Admins can also indicate the number of Curfew Checks per week, by Phase. To add the number of Curfew Checks per week, Users will click on the pen icon.

Involvement ID DC-20181101-1	Court/Judge DUI Court 	Caseload Default 	Curfew checks per week None 	Curfew Requirements None 	Sobriety Date Awaiting Negative Test
---------------------------------	--	---	--	---	---

Arrest 10/12/2018	<input checked="" type="checkbox"/> Referral 11/01/2018	<input checked="" type="checkbox"/> Approval/Denial Approved: 11/07/2018
----------------------	--	---

Phase History

Track	Phase	Status	Start Date
-------	-------	--------	------------





Checks Per Week

2

CANCEL SAVE

INVOLVEMENT OVERVIEW - CURFEW CHECKS

Users have the ability to set the Client's Curfew requirements by clicking on the pen icon. The User can set as many rules as necessary. For example a weekday rule and a weekend rule.

Involvement ID DC-20181101-1	Court/Judge DUI Court 	Caseload Default 	Curfew checks per week None 	Curfew Requirements None 	Sobriety Date Awaiting Negative Test
Arrest 10/12/2018		✓ Referral 11/01/2018		✓ Approval/Denial Approved: 11/07/2018	
Phase History					
Track	Phase	Status	Start Date		

Edit Curfew

Days of the week

S

M

T

W

T

F

S

Start Time

End Time

Days of the week

S

M

T

W

T

F

S

Start Time

End Time

+ Add another rule


REMOVE CURFEW

CANCEL

SAVE

INVOLVEMENT OVERVIEW - WARNING


Users have the ability to set Warnings on each Involvement. Once a Warning message has been set, the Warning will be visible on the top of the Client's profile at all times.

Involvement ID DC-20181101-1	Court/Judge DUI Court	Caseload Default	Curfew checks per week None	Curfew Requirements None	Sobriety Date Awaiting Negative Test	
Arrest 10/12/2018	<input checked="" type="checkbox"/> Referral 11/01/2018	<input checked="" type="checkbox"/> Approval/Denial Approved: 11/07/2018	<input checked="" type="checkbox"/> Admitted 11/19/2018			Days In Program: 58
Phase History						CHANGE PHASE STATUS
Track	Phase	Status	Start Date	End Date	Days In Phase	
Default	Stabilization	In Progress	11/19/2018	Earliest Promotion: 02/19/2019	58	

Warning Editor


251 of 300 remaining

CANCEL
SAVE CHANGES


NOTIFY PO WHEN CLIENT HAS ENTERED THE LAST PHASE.

Napier, Jack

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Involvement ID
DUI-20190102-1

Arrest
01/01/2019

INVOLVEMENT OVERVIEW - TRANSFER TRACKS

In the scenario where a Client must be transferred to a different Track at the same Court (i.e. Client was reassessed and the needs have changed), Users can click on the pen icon next to the Track that is currently in progress. Doing so will launch a two-step process to transfer the client to another Track.

Phase History CHANGE PHASE STATUS ▼					
Track	Phase	Status	Start Date	End Date	Days in Phase
Adult 	Recovery	 In Progress	01/26/2018	Earliest Promotion: 04/30/2018	24
Adult	Stabilization	 Complete	01/12/2018	01/26/2018	14

INVOLVEMENT OVERVIEW - TRANSFER TRACKS

The first step allows the User to select the new Tack, Caseload, reason, and the ability to enter additional notes.

Edit Default Track

1 Track

2 Intake Details

Track *

TEST 1

Caseload *

Default

Reason *

Re-assessment shows increased Needs

Notes

CANCEL

NEXT

INVOLVEMENT OVERVIEW - TRANSFER TRACKS

The second step allows Users to select a Phase, start date, Docket schedule, Drug Testing group, and number of Curfew Checks per week.

Edit Adult Track

✓ Track

2 Intake Details

Initial Phase *

Start Date *

04/04/2018

Docket Schedule

Drug Testing Group

Number of Curfew Checks Per Week

BACK

CANCEL

TRANSFER

INVOLVEMENT OVERVIEW - CHANGE PHASE STATUS

Users have the ability to change a Client's Phase from the Involvement overview screen. Users would click on the *Change Phase Status* hyperlink in the Phase History section. Based on which Phase the Client is in, Users will have the ability to Promote, Demote, Suspend, Graduate, or Terminate the involvement.

Phase History

Track	Phase	Status	Start Date	End Date
Default	Phase 4	In Progress	09/04/2018	Earliest Promotion: 01/04/2019

Accounting

Current Amount Due
\$0.00

Community Service

CHANGE PHASE STATUS ▾

Promote
 Demote
 Suspend
 Graduate
 Terminate

CHANGE PHASE - PROMOTE CLIENT

When promoting a Client, Users will be presented with the list of Phase Milestones the Client was to complete. Users would check all Milestones that have been completed, update the completed date (if not the current date) and click the *Next* button to select the Milestones to be completed in the next Phase.

1 Review Stabilization Phase (Current)

PHASE DETAILS

PHASE	START DATE	EARLIEST END DATE	MILESTONES
Stabilization	11/19/2018	2/19/2019	0 of 12 completed

MILESTONES

MILESTONE	DUE	COMPLETED
<input type="checkbox"/> 1. Sign contract	11/19/2018	
<input type="checkbox"/> 2. Sign color line	11/19/2018	
<input type="checkbox"/> 3. Report to re-entry or recovery facility as ordered	11/22/2018	
<input type="checkbox"/> 4. Report to case manager	11/22/2018	
<input type="checkbox"/> 5. Contact Dr. Murphey	11/26/2018	
<input type="checkbox"/> 6. Contact treatment provider to enter treatment	11/26/2018	
<input type="checkbox"/> 7. Review participant handbook	11/26/2018	
<input type="checkbox"/> 8. Seek sponsor	11/26/2018	
<input type="checkbox"/> 9. Attend support group meetings		
<input type="checkbox"/> 10. Seek or maintain employment		
<input type="checkbox"/> 11. Punctuality		
<input type="checkbox"/> 12. 30 days sobriety		

2 Setup Recovery Phase (Next)

CHANGE PHASE - PROMOTE CLIENT

The Milestones on the next Phase are automatically checked by default. Users have the ability to uncheck Milestones that may not be applicable to the Client.

☒ Review Stabilization Phase (Current)
 ☒ 2 Setup Recovery Phase (Next)

PHASE DETAILS

PHASE	START DATE	EARLIEST END DATE	MINIMUM DURATION
Recovery	1/16/2019	4/16/2019	3 Months

MILESTONES

Milestone	Due
<input checked="" type="checkbox"/> 1. Appear in court as scheduled	N/A
<input checked="" type="checkbox"/> 2. Appear for alcohol and other drug testing	N/A
<input checked="" type="checkbox"/> 3. Participate in re-entry or recovery facility as ordered	N/A
<input checked="" type="checkbox"/> 4. Meet with mental health provider as required	N/A
<input checked="" type="checkbox"/> 5. Attend and participate in chemical dependency treatment	N/A
<input checked="" type="checkbox"/> 6. Meet with sponsor	N/A
<input checked="" type="checkbox"/> 7. Attend support group meetings as ordered	N/A
<input checked="" type="checkbox"/> 8. Seek or maintain employment	N/A
<input checked="" type="checkbox"/> 9. Develop a written payment plan for fines, fees, restitution, or other financial responsibilities	2/15/2019
<input checked="" type="checkbox"/> 10. Punctuality	N/A
<input checked="" type="checkbox"/> 11. 90 days sobriety	4/16/2019

[BACK](#)
[PROMOTE](#)

CHANGE PHASE - DEMOTE CLIENT

In the event that a Client is demoted to the previous phase, Users have the ability to demote the Client from the Change Phase Status hyperlink. The User is presented with the previous Phase milestones to select and will click on the Demote button. **Note: AutoMon will be redesigning the phase requirement structure in a future release as we recognize that 'Demote' is not the proper terminology.*

Phase Demotion

PHASE DETAILS

PHASE	START DATE	EARLIEST END DATE	MINIMUM DURATION
Stabilization	1/16/2019	4/16/2019	3 Months

MILESTONES

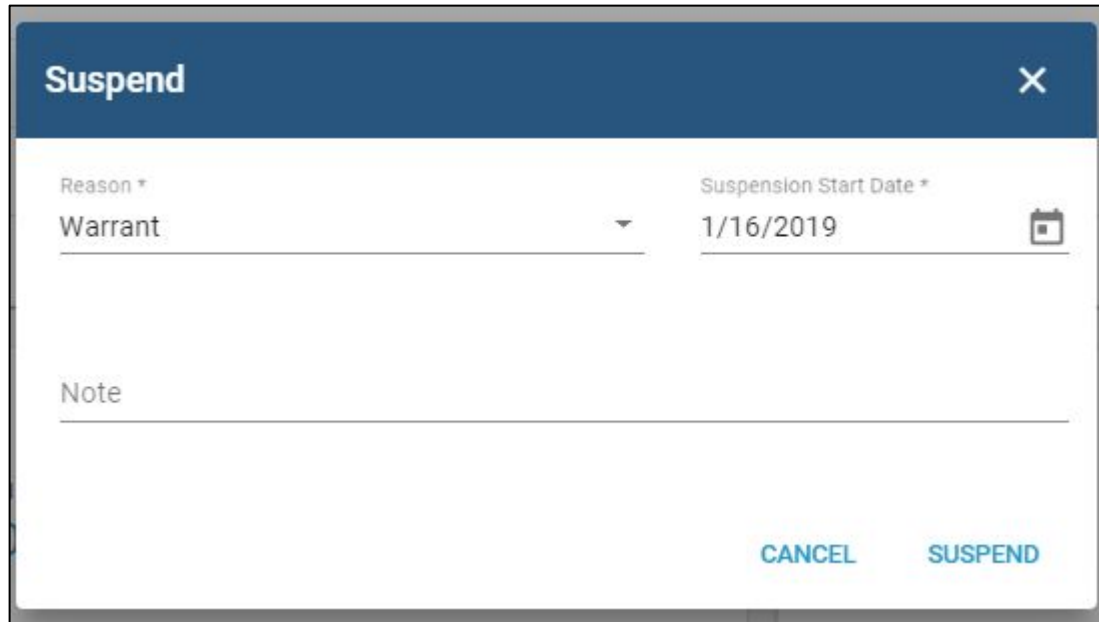
MILESTONE	DUE DATE
<input checked="" type="checkbox"/> 1. Sign contract	Date required
<input checked="" type="checkbox"/> 2. Sign color line	Date required
<input checked="" type="checkbox"/> 3. Report to re-entry or recovery facility as ordered	1/19/2019
<input checked="" type="checkbox"/> 4. Report to case manager	1/19/2019
<input checked="" type="checkbox"/> 5. Contact Dr. Murphey	1/23/2019
<input checked="" type="checkbox"/> 6. Contact treatment provider to enter treatment	1/23/2019
<input checked="" type="checkbox"/> 7. Review participant handbook	1/23/2019
<input checked="" type="checkbox"/> 8. Seek sponsor	1/23/2019
<input checked="" type="checkbox"/> 9. Attend support group meetings	N/A
<input checked="" type="checkbox"/> 10. Seek or maintain employment	N/A
<input checked="" type="checkbox"/> 11. Punctuality	N/A
<input checked="" type="checkbox"/> 12. 30 days sobriety	2/15/2019

CANCEL

DEMOTE

CHANGE PHASE - SUSPEND INVOLVEMENT

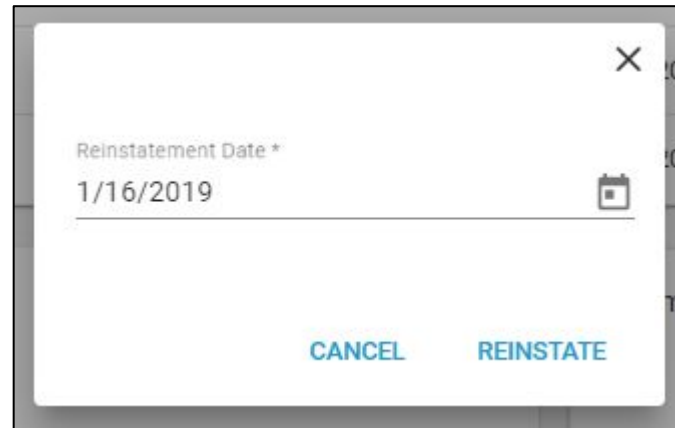
There may be scenarios in which a User would want to Suspend an Involvement (such as a warrant issued for the Client). Users have the ability to suspend an involvement. When suspending an involvement, the Client is no longer included on system generated tasks such as a hearing, randomized drug test, contact appointments, etc.



The screenshot shows a modal dialog box titled "Suspend" with a close button (X) in the top right corner. The dialog contains two required fields: "Reason *" with a dropdown menu currently showing "Warrant", and "Suspension Start Date *" with the date "1/16/2019" and a calendar icon. Below these fields is a "Note" text area. At the bottom right, there are two buttons: "CANCEL" and "SUSPEND".

CHANGE PHASE - REINSTATE INVOLVEMENT

Users can reinstate a Suspended Involvement from the *Change Phase Status* hyperlink. Doing so, will make the Client's Involvement active again.



A dialog box titled "CHANGE PHASE - REINSTATE INVOLVEMENT" with a close button (X) in the top right corner. The dialog contains a label "Reinstatement Date *" followed by a text input field containing the date "1/16/2019". To the right of the date is a calendar icon. At the bottom of the dialog are two buttons: "CANCEL" and "REINSTATE".

CHANGE PHASE - GRADUATE CLIENT

Once the Client has met all requirements set forth by the Program, Users can graduate the Client by clicking on the *Change Phase Status* hyperlink. The User sets the graduation date and marks all remaining Milestones as complete. Once the Client has graduated, Users can no longer make phase status updates.

Graduate Participant

GRADUATION DATE
1/16/2019

CURRENT PHASE

NAME Stabilization
START DATE Jan 16, 2019
EARLIEST END DATE Apr 16, 2019

CURRENT MILESTONES (CHECK TO COMPLETE)

<input type="checkbox"/> 1. Sign contract	DUE: Jan 25, 2019	Completed
<input type="checkbox"/> 2. Sign color line	DUE: Jan 25, 2019	Completed
<input type="checkbox"/> 3. Report to re-entry or recovery facility as ordered	DUE: Jan 19, 2019	Completed
<input type="checkbox"/> 4. Report to case manager	DUE: Jan 19, 2019	Completed
<input type="checkbox"/> 5. Contact Dr. Murphey	DUE: Jan 23, 2019	Completed
<input type="checkbox"/> 6. Contact treatment provider to enter treatment	DUE: Jan 23, 2019	Completed
<input type="checkbox"/> 7. Review participant handbook	DUE: Jan 23, 2019	Completed
<input type="checkbox"/> 8. Seek sponsor	DUE: Jan 23, 2019	Completed
<input type="checkbox"/> 9. Attend support group meetings		Completed
<input type="checkbox"/> 10. Seek or maintain employment		Completed
<input type="checkbox"/> 11. Punctuality		Completed
<input type="checkbox"/> 12. 30 days sobriety		Completed

CANCEL
GRADUATE

CHANGE PHASE - TERMINATE CLIENT

In the scenarios in which the Client will not be completing the Program, Users have the ability to Terminate the Client from the Change Phase Status hyperlink. Users are required to enter a reason for Termination, a Termination date, and can add additional notes.

Terminate

Reason *

Failed to Complete

Termination Date *

1/16/2019





Note

CANCEL

TERMINATE

CHANGE PHASE - PHASE STATUS CHANGE

The Phase History section updates to reflect any Phase status changes.

Phase History					
Track	Phase	Status	Start Date 	End Date	Days In Phase
Default	Stabilization	 Completed	01/16/2019	01/16/2019	0
Default	Recovery	 Failed	01/16/2019	01/16/2019	0
Default	Stabilization	 Completed	11/19/2018	01/16/2019	58

TOPIC 16: NEW ACTIVITIES

Subtopics:


1. Overview
2. Community Service
3. Contact
4. Contact Schedule
5. Form
6. Hearing Schedule
7. Progress Report
8. Reward
9. Sanction

NEW ACTIVITIES - OVERVIEW

The Activities section currently has two purposes. Users are able to add specific activities by clicking on the + (plus) icon. The Activities listing also records all scheduled, missed, and completed activities. This listing will turn into the audit log in a future release. Users have the ability to print an activity listing report, refresh, and filter the listing.

Napier, Jack

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Client Info

Criminal History


Involvement History


Involvement DUI-20190102-1


Activities



Activities will be deprecated soon, please use notes instead. [GO TO NOTES](#)

+



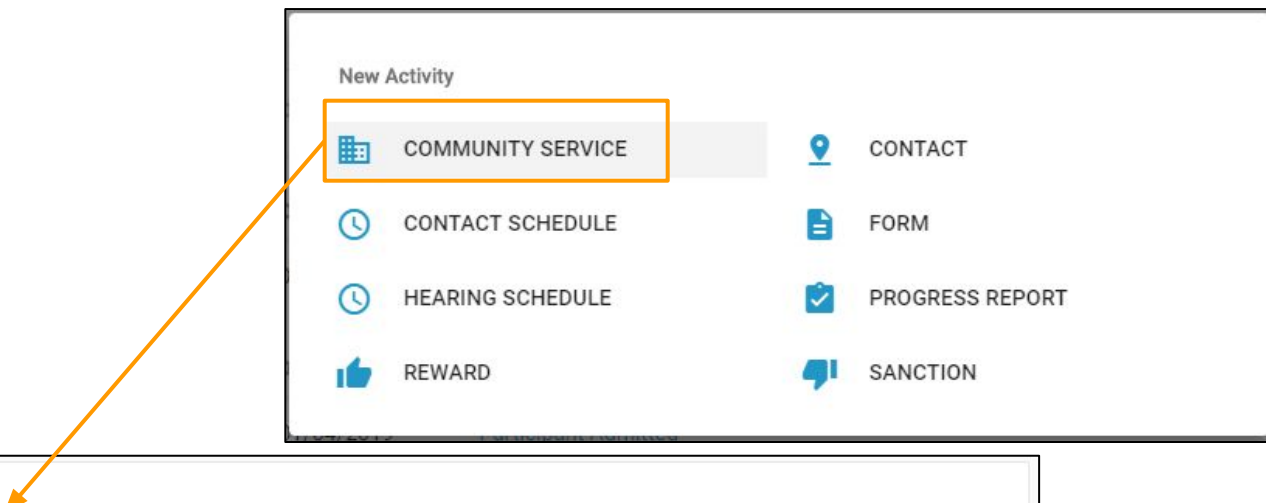












Date ↓	Type	Notes	Description	Action By
TODAY & UPCOMING				
02/05/2019	Drug Test		Drug Test Scheduled	Eileen Marin 
OLDER THAN TODAY				
01/04/2019	Participant Admitted			Eileen Marin

NEW ACTIVITIES - COMMUNITY SERVICE

When a User clicks on the Community Service activity, they will be redirected to the Community Service Log Entries screen. This allows Users to enter Community Service hours completed by the Client.



New Activity

-  **COMMUNITY SERVICE**
-  **CONTACT SCHEDULE**
-  **HEARING SCHEDULE**
-  **REWARD**
-  **CONTACT**
-  **FORM**
-  **PROGRESS REPORT**
-  **SANCTION**

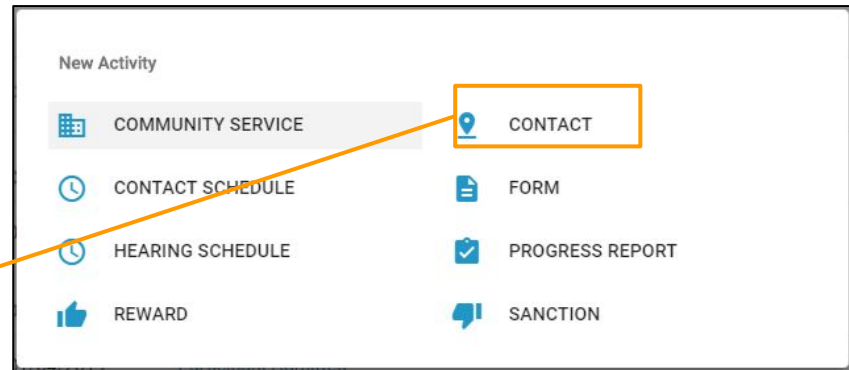
Log Entries

DATE	REASON	WORKSITE	REFERENCE #	HOURS
1/16/2019	Reason *	Worksite	Reference #	Hours Ordered *

CANCEL **LOG**

NEW ACTIVITIES - CONTACT

When a User clicks on the Contact activity, they can record a completed Contact. Users are required to select a Contact type, Contact date, and start time. Users also have the ability to add additional notes.



New Activity

- COMMUNITY SERVICE
- CONTACT
- CONTACT SCHEDULE
- HEARING SCHEDULE
- REWARD
- FORM
- PROGRESS REPORT
- SANCTION

An orange box highlights the 'CONTACT' option, and an orange arrow points from it to the 'Create Contact' form below.



Create Contact

CONTACT DETAILS

Contact type *

Contact date * 1/16/2019 Start time *

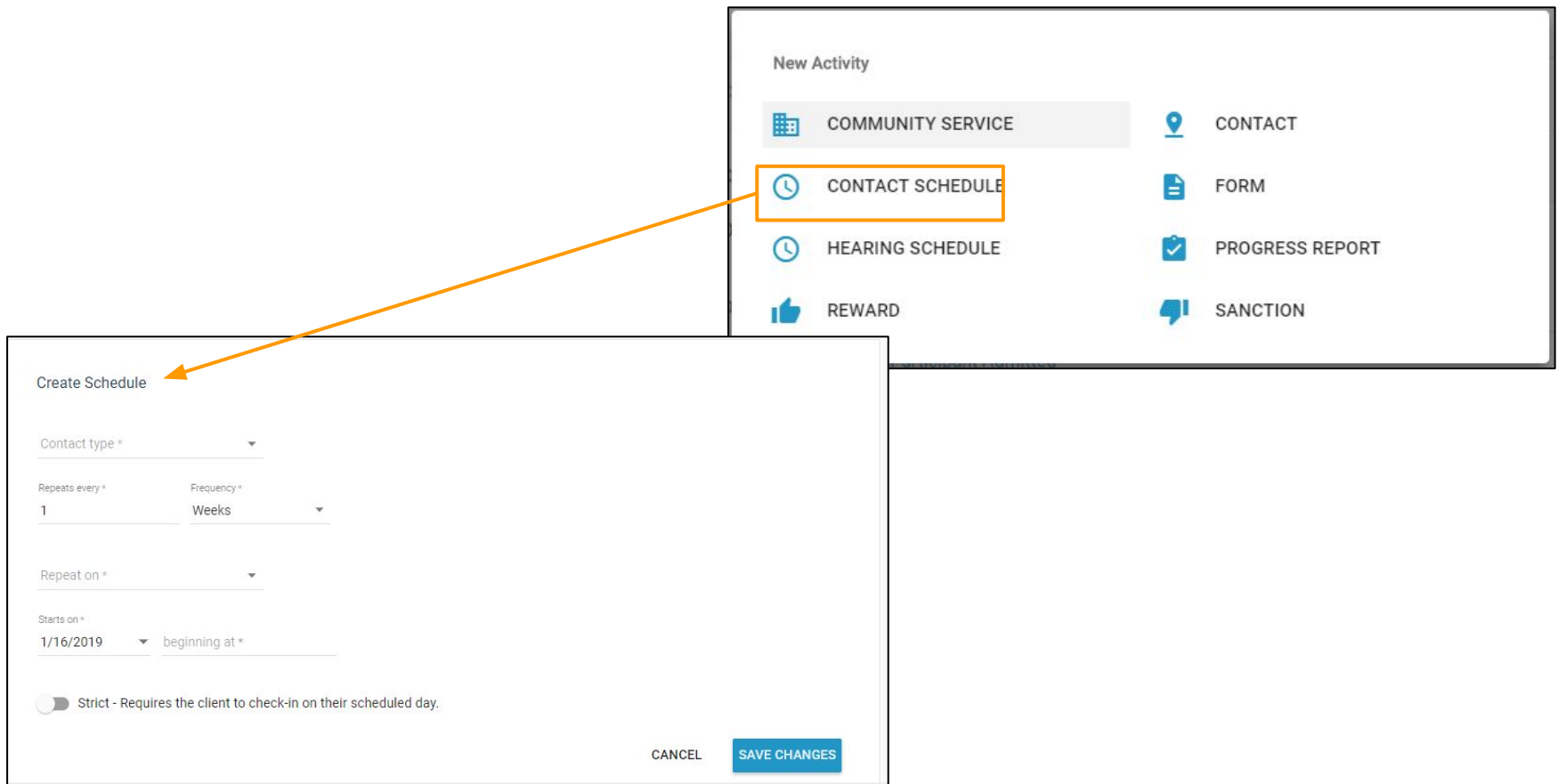
Notes

CANCEL CREATE CONTACT

The form contains input fields for 'Contact type', 'Contact date', and 'Start time', followed by a large text area for 'Notes'. At the bottom right are 'CANCEL' and 'CREATE CONTACT' buttons. An orange arrow points from the 'CONTACT' option in the menu above to the 'Create Contact' title.

NEW ACTIVITIES - CONTACT SCHEDULE

When a User clicks on the Contact Schedule activity, they can set up a recurring Contact reporting schedule. Users are required to select a Contact type, enter the frequency, start date, and can indicate if the reporting requirement is strict (requires the Client check in on the scheduled date) or flexible (requires the Client check in by the end of the reporting period).



New Activity

- COMMUNITY SERVICE
- CONTACT SCHEDULE**
- HEARING SCHEDULE
- REWARD
- CONTACT
- FORM
- PROGRESS REPORT
- SANCTION

Create Schedule

Contact type *

Repeats every * Frequency *

1 Weeks

Repeat on *

Starts on * beginning at *

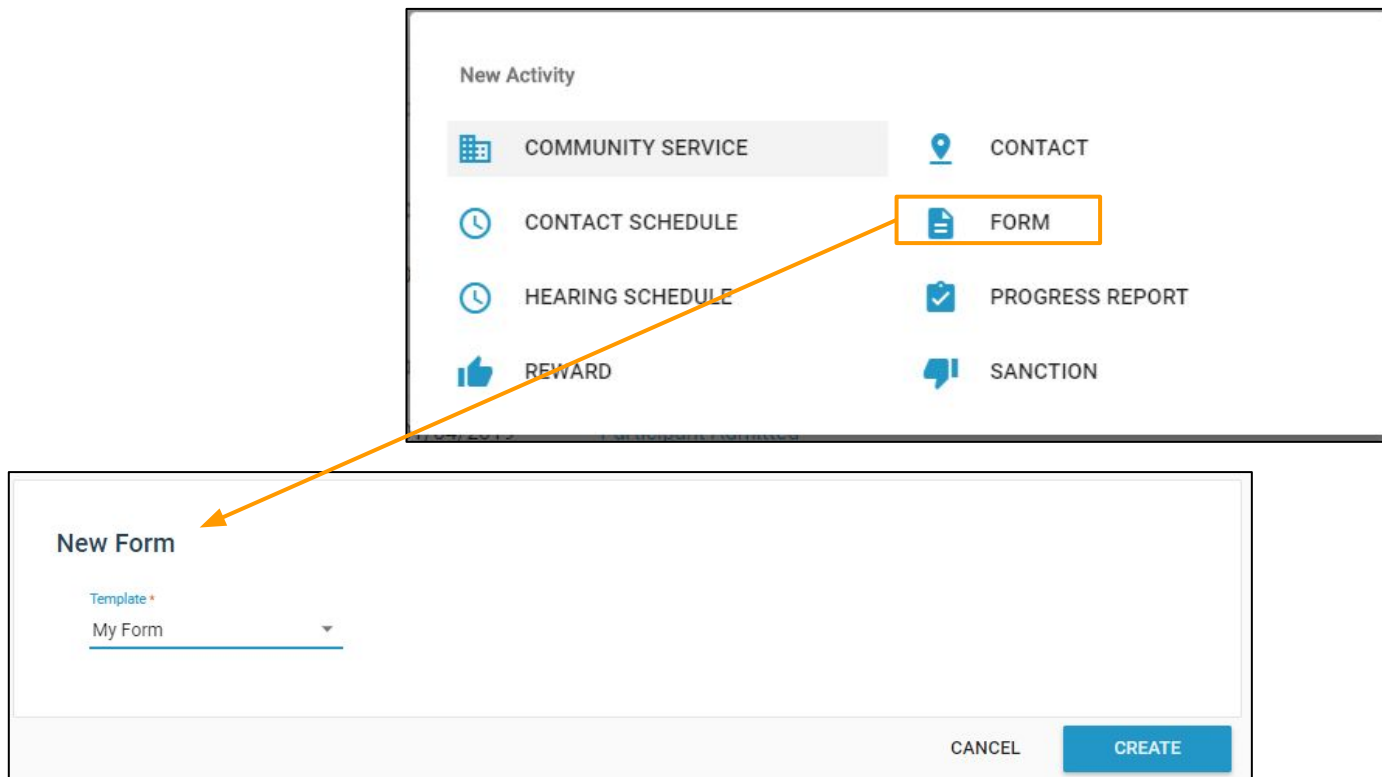
1/16/2019

☐ Strict - Requires the client to check-in on their scheduled day.

CANCEL SAVE CHANGES









NEW ACTIVITIES - FORM

Users have the ability to generate new Forms from the Activity section. Once a User clicks on the *Form* option, they are redirected to select an existing template. Users will have the ability to upload documents under the Documents & Forms section.



The image shows a 'New Activity' form with a grid of options. The 'FORM' option is highlighted with an orange box. An orange arrow points from this box to a 'New Form' dialog box below. The 'New Form' dialog has a 'Template' dropdown menu with 'My Form' selected, and 'CANCEL' and 'CREATE' buttons at the bottom.

New Activity

 COMMUNITY SERVICE	 CONTACT
 CONTACT SCHEDULE	 FORM
 HEARING SCHEDULE	 PROGRESS REPORT
 REWARD	 SANCTION

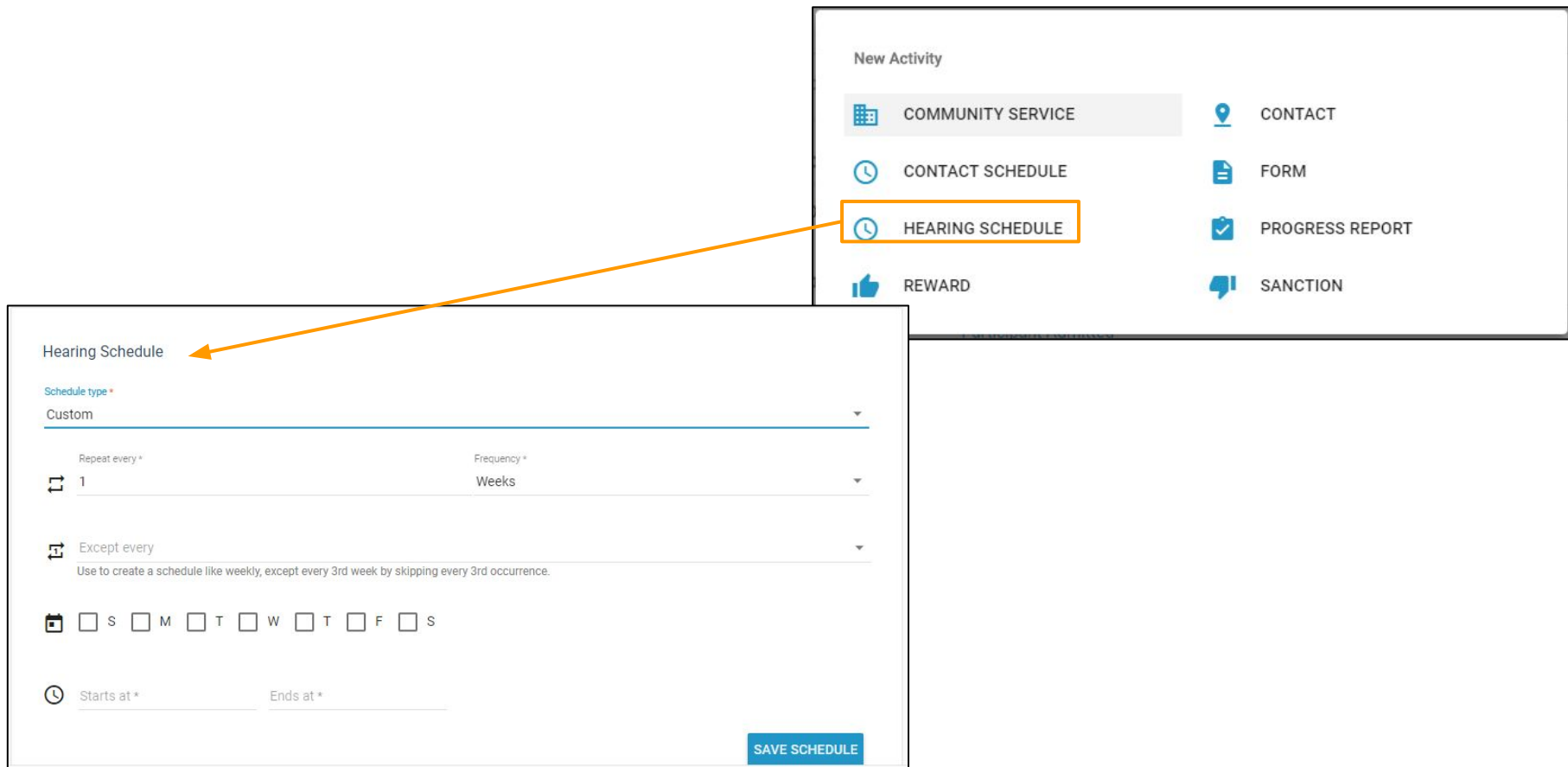
New Form

Template *
My Form ▼

CANCEL CREATE

NEW ACTIVITIES - HEARING SCHEDULE

Users have the ability to setup a Hearing schedule for a Client. When a User clicks on the Hearing Schedule activity option, they are redirected to select an existing schedule type or create a custom schedule.



New Activity

- COMMUNITY SERVICE
- CONTACT SCHEDULE
- HEARING SCHEDULE**
- REWARD
- CONTACT
- FORM
- PROGRESS REPORT
- SANCTION

Hearing Schedule

Schedule type *
Custom

Repeat every * 1 Frequency * Weeks

Except every
Use to create a schedule like weekly, except every 3rd week by skipping every 3rd occurrence.

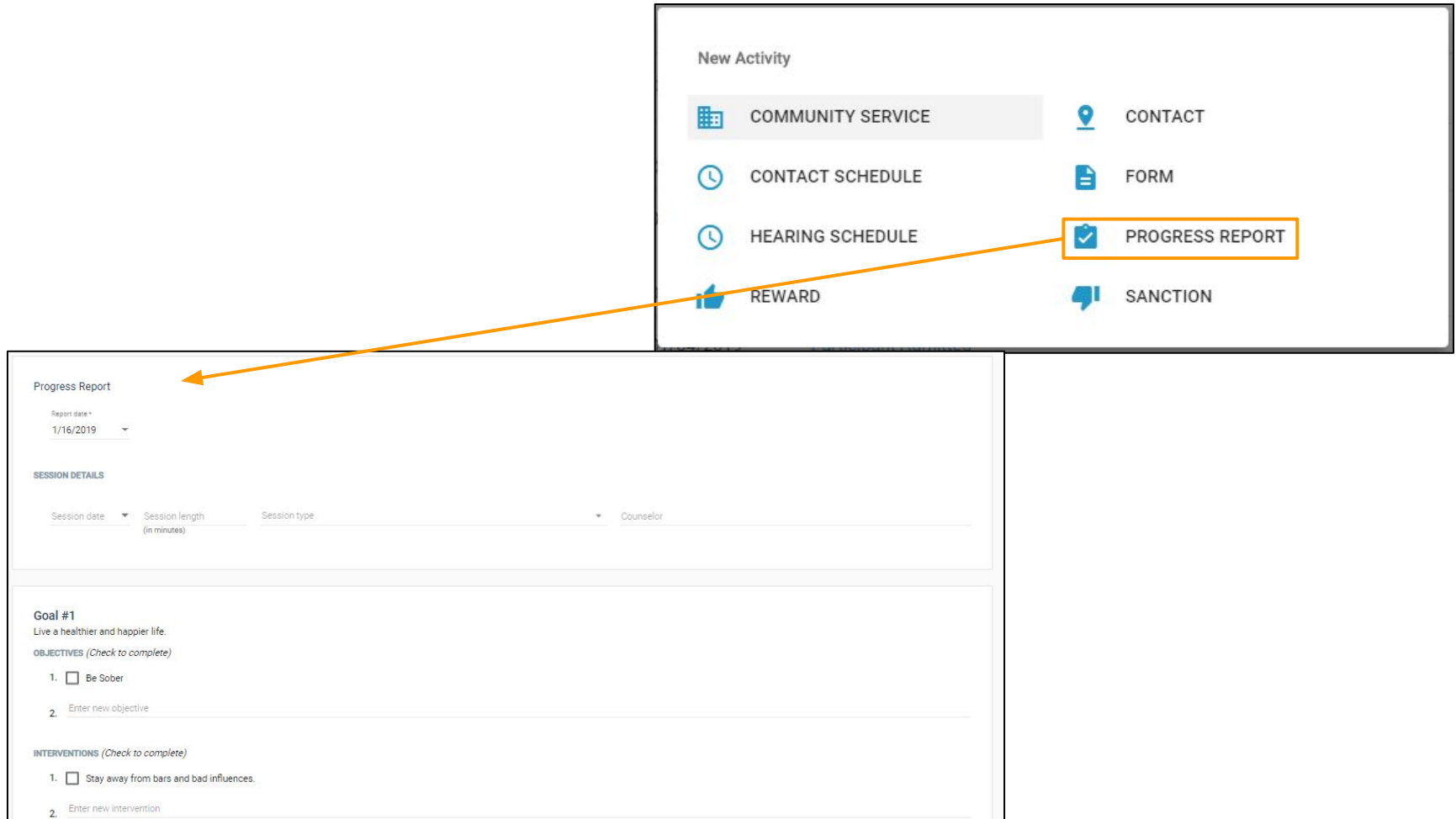
☐ S ☐ M ☐ T ☐ W ☐ T ☐ F ☐ S

Starts at * Ends at *

SAVE SCHEDULE

NEW ACTIVITIES - PROGRESS REPORT

Users have the ability to enter a Progress Report from the new activity option. The Client must have an existing treatment plan with goals in order to complete a progress report.



New Activity

- COMMUNITY SERVICE
- CONTACT
- CONTACT SCHEDULE
- FORM
- HEARING SCHEDULE
- PROGRESS REPORT**
- REWARD
- SANCTION

Progress Report

Report date: 1/16/2019

SESSION DETAILS

Session date: Session length (in minutes): Session type: Counselor:

Goal #1
Live a healthier and happier life.

OBJECTIVES (Check to complete)

- ☐ Be Sober
- Enter new objective


INTERVENTIONS (Check to complete)


- ☐ Stay away from bars and bad influences.
- Enter new intervention


NEW ACTIVITIES - REWARD


Users are able to add new Rewards from the New Activity option. Once clicked, Users will be redirected to enter a new Reward. Users can also add Rewards during the Hearing review and complete Hearing steps from the main tasks listing.


New Activity


 COMMUNITY SERVICE


 CONTACT


 CONTACT SCHEDULE

 FORM

 HEARING SCHEDULE

 PROGRESS REPORT

 **REWARD**

 SANCTION

New Reward(s)

DATE	REWARD	NOTES
1/16/2019	Select reward *	Notes

CANCELADD REWARD(S)

NEW ACTIVITIES - SANCTIONS

Users are able to add new Sanctions from the New Activity option. Once clicked, Users will be redirected to enter a new Sanction. Users can also add sanctions during the hearing review and completing a hearing steps from the main tasks listing.



The screenshot displays the 'New Activity' form. On the right side, a list of activity options is shown: COMMUNITY SERVICE, CONTACT, ACT SCHEDULE, FORM, NG SCHEDULE, and SANCTION. The 'SANCTION' option is highlighted with an orange box. An orange arrow points from this box to the 'New Sanction' section on the left. The 'New Sanction' section includes a 'SANCTION DATE' dropdown set to '1/16/2019', a 'Notes' text area, and two sections for selecting sanctions: 'POLICY RECOMMENDED SANCTIONS' (which states 'There are no recommended sanctions for the infractions listed.') and 'ALL OTHER SANCTIONS' (which lists various options with checkboxes).

New Activity

COMMUNITY SERVICE

CONTACT

ACT SCHEDULE

FORM

NG SCHEDULE

PROGRESS REPORT

SANCTION

New Sanction

SANCTION DATE 1/16/2019

Notes

POLICY RECOMMENDED SANCTIONS

There are no recommended sanctions for the infractions listed.

ALL OTHER SANCTIONS

- ☐ Reprimand
- ☐ Two (2) hours community service
- ☐ Four (4) hours community service
- ☐ Double community service requirement
- ☐ Six (6) hours community service
- ☐ Pay \$70 for confirmation testing
- ☐ Reset Sobriety date
- ☐ Contract extension


TOPIC 17: SURVEYS, ASSESSMENTS & GOALS

Subtopics:

1. Overview
2. Surveys
3. Assessments
4. Treatment Plans

SURVEYS, ASSESSMENTS & GOALS - OVERVIEW

In this section, Users have the ability to record a Survey, Assessment, Treatment Plan, and create a Progress Report. While each of these functions are typically completed at the beginning of the program, they can be administered at any time during the Client's participation.

Napier, Jack
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Client Info

Criminal History


Involvement History

Involvement DUI-20190102-1

Activities

Surveys, Assessments & Goals

SURVEYS | ASSESSMENTS | TREATMENT PLAN

[ADD SURVEY](#) 

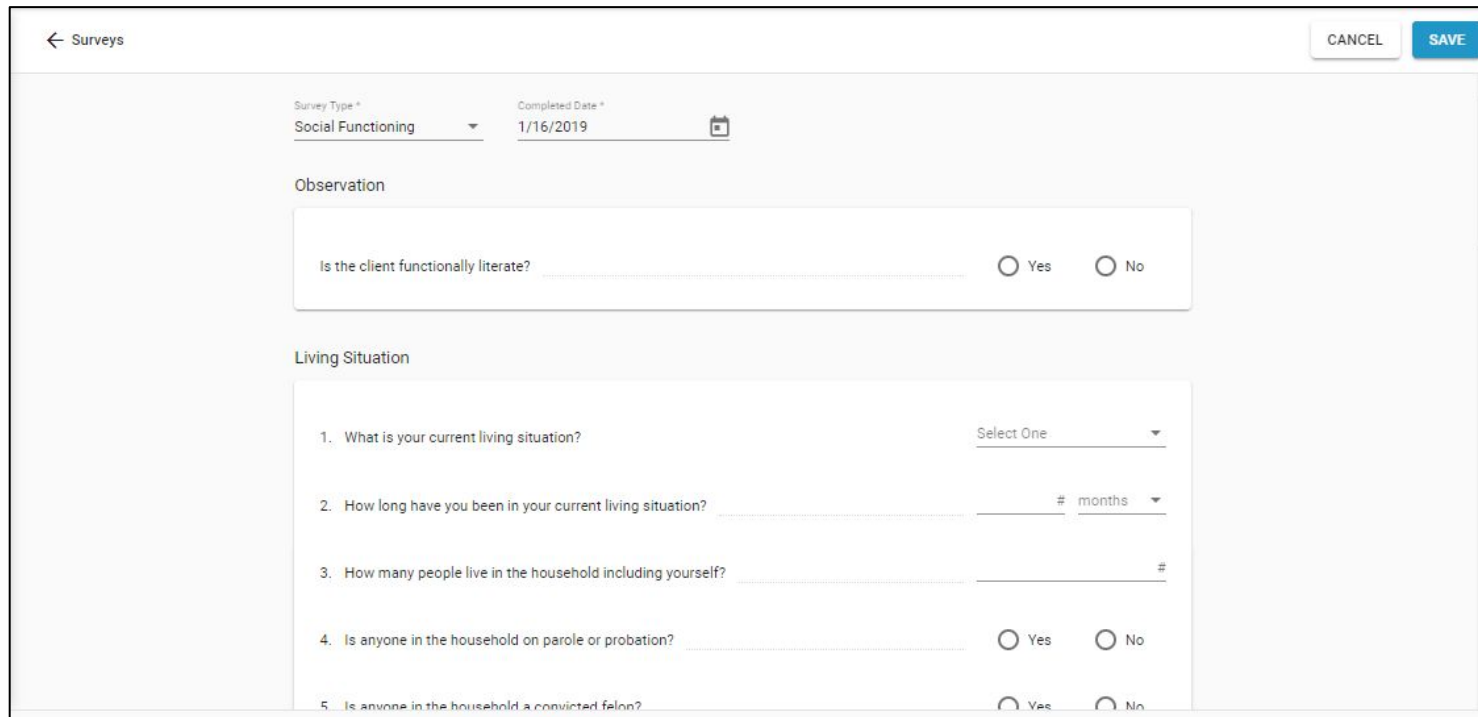
Completed Date ↓

Survey Type

No surveys found

SURVEYS, ASSESSMENTS & GOALS - SURVEYS

In the Survey section, Users can print a blank Survey document for the Client to complete. The User can add a new Survey by clicking on the Add Survey hyperlink. One example of a Survey in this section is a 19 question Social Functioning Survey. AutoMon will be adding an Exit Survey and Satisfaction Survey in a future release.



The screenshot shows a web form titled "Surveys" with a back arrow and "CANCEL" and "SAVE" buttons. The form includes fields for "Survey Type" (set to "Social Functioning") and "Completed Date" (set to "1/16/2019"). Below these are two sections: "Observation" and "Living Situation".

Observation

Is the client functionally literate? ☐ Yes ☐ No

Living Situation

1. What is your current living situation?

2. How long have you been in your current living situation?




3. How many people live in the household including yourself?

4. Is anyone in the household on parole or probation? ☐ Yes ☐ No

5. Is anyone in the household a convicted felon? ☐ Yes ☐ No

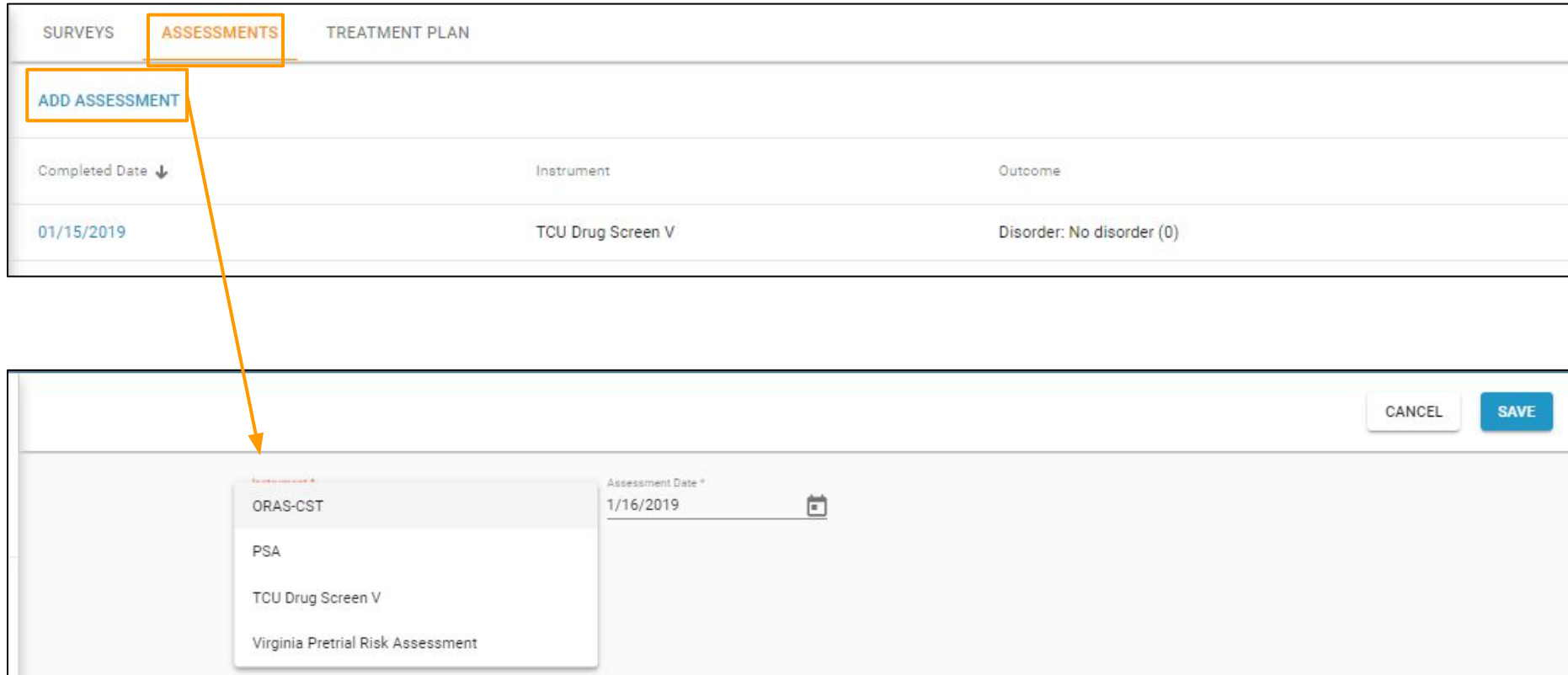
SURVEYS, ASSESSMENTS & GOALS - SURVEYS

Users have the ability to edit or delete a completed Survey by clicking on the More icon to the right of the row. Users can also see the responses to the Survey by clicking on the Survey Date hyperlink.

SURVEYS		ASSESSMENTS	TREATMENT PLAN
ADD SURVEY			
Completed Date ↓	Survey Type		
01/16/2019	Social Functioning		
		<div>  Edit Survey  Delete Survey</div>	

SURVEYS, ASSESSMENTS & GOALS - ASSESSMENTS

In the Assessment section, Users click on the *Add Assessment* hyperlink to create a new Assessment for the Client. All available Assessments for your Court that were made available during system configuration will be listed in the instrument drop down.



The screenshot displays the 'ASSESSMENTS' tab in the AutoMon interface. The 'ADD ASSESSMENT' button is highlighted with an orange box. An orange arrow points from this button to a dropdown menu in the assessment form. The dropdown menu lists the following assessment instruments: ORAS-CST, PSA, TCU Drug Screen V, and Virginia Pretrial Risk Assessment. The form also includes an 'Assessment Date' field with a calendar icon and a date of 1/16/2019. The 'CANCEL' and 'SAVE' buttons are visible in the top right corner of the form.

SURVEYS	ASSESSMENTS	TREATMENT PLAN
ADD ASSESSMENT		
Completed Date ↓	Instrument	Outcome
01/15/2019	TCU Drug Screen V	Disorder: No disorder (0)

ASSESSMENT FORM:

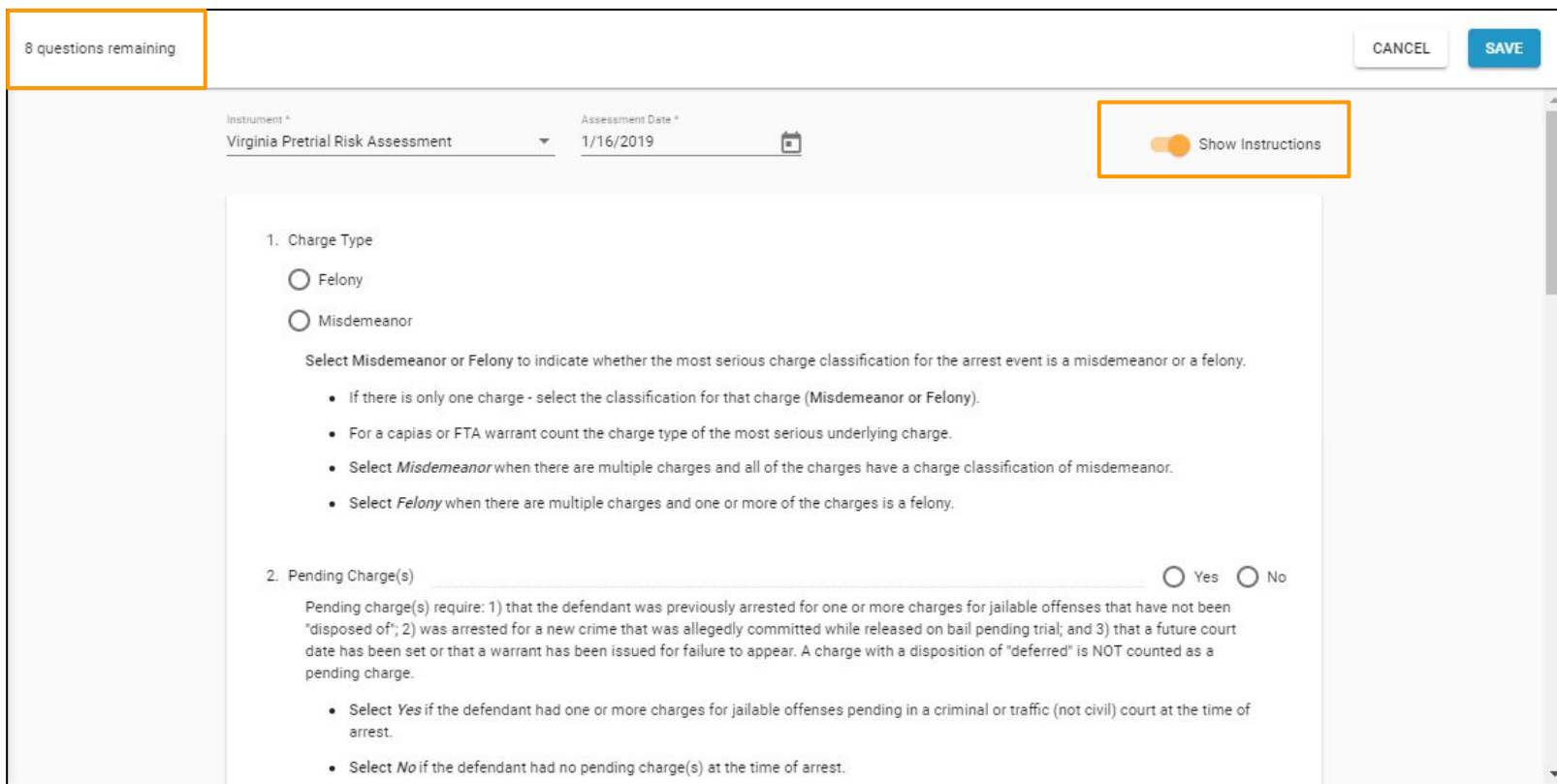
Assessment Date: 1/16/2019

Instrument: ORAS-CST, PSA, TCU Drug Screen V, Virginia Pretrial Risk Assessment

CANCEL SAVE

SURVEYS, ASSESSMENTS & GOALS - ASSESSMENTS

Users have the ability to turn on the Assessment instructions. For assessment instruments that provide instructions aids (not every assessment instrument provides instructions), these instructions provide additional clarification for each question. The top of the Assessment will also display the number of remaining questions.



8 questions remaining

CANCEL SAVE

Instrument *
Virginia Pretrial Risk Assessment

Assessment Date *
1/16/2019

☒ Show Instructions

1. Charge Type

☐ Felony

☐ Misdemeanor

Select Misdemeanor or Felony to indicate whether the most serious charge classification for the arrest event is a misdemeanor or a felony.

- If there is only one charge - select the classification for that charge (Misdemeanor or Felony).
- For a capias or FTA warrant count the charge type of the most serious underlying charge.
- Select *Misdemeanor* when there are multiple charges and all of the charges have a charge classification of misdemeanor.
- Select *Felony* when there are multiple charges and one or more of the charges is a felony.

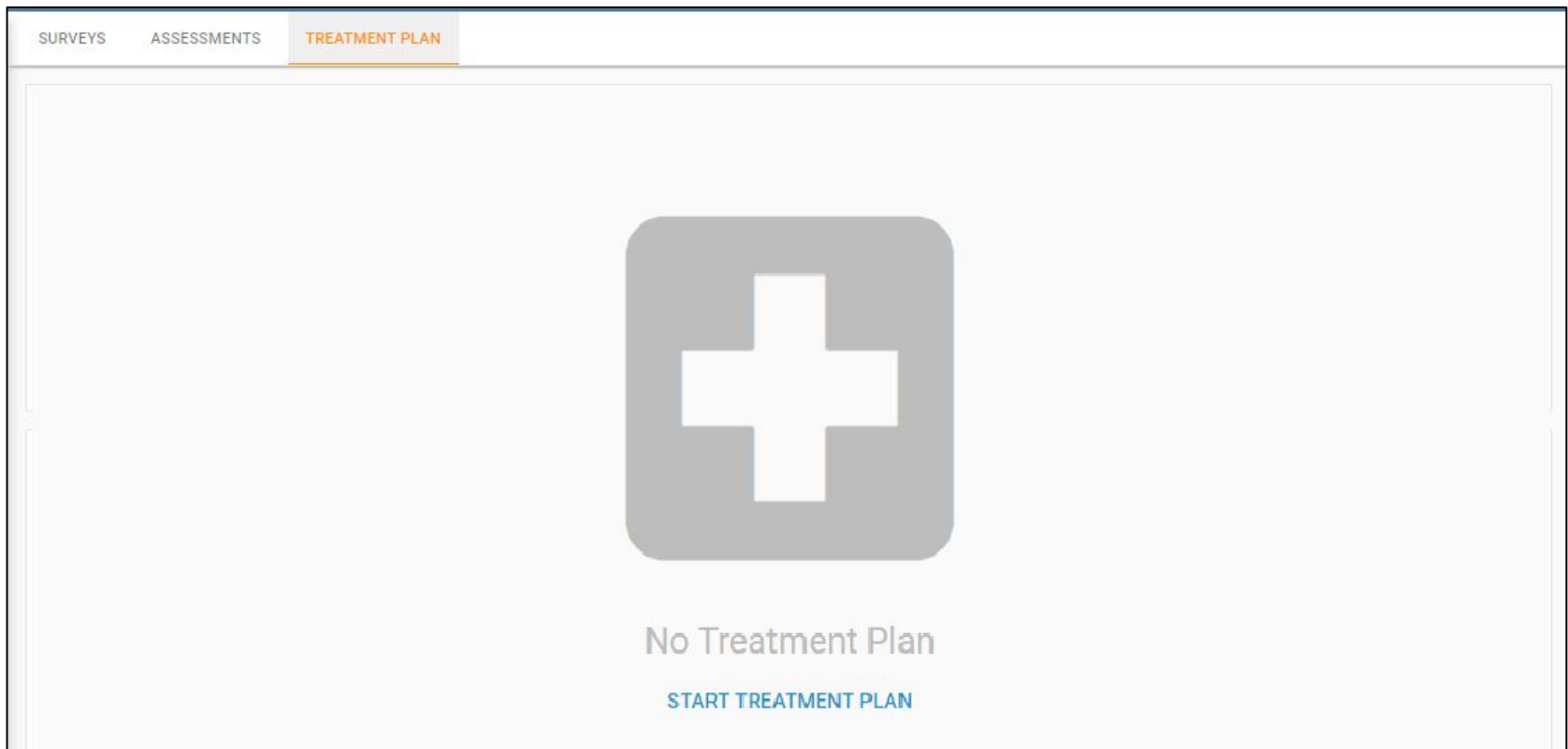
2. Pending Charge(s) ☐ Yes ☐ No

Pending charge(s) require: 1) that the defendant was previously arrested for one or more charges for jailable offenses that have not been "disposed of"; 2) was arrested for a new crime that was allegedly committed while released on bail pending trial; and 3) that a future court date has been set or that a warrant has been issued for failure to appear. A charge with a disposition of "deferred" is NOT counted as a pending charge.

- Select *Yes* if the defendant had one or more charges for jailable offenses pending in a criminal or traffic (not civil) court at the time of arrest.
- Select *No* if the defendant had no pending charge(s) at the time of arrest.

SURVEYS, ASSESSMENTS & GOALS - TREATMENT PLAN

The first time that a User clicks on the Client's Treatment Plan link, the User will have the ability to add and create a Treatment Plan. ***Note: a Client must have a Treatment Plan in order to add a Progress Report.***




SURVEYS, ASSESSMENTS & GOALS - TREATMENT PLAN


To start a Treatment Plan, Users enter the Start Date, End Date (optional), and the starting diagnosis.

Treatment Plan

Start date *

 1/16/2019 ▼

End date

 1/16/2020 ▼

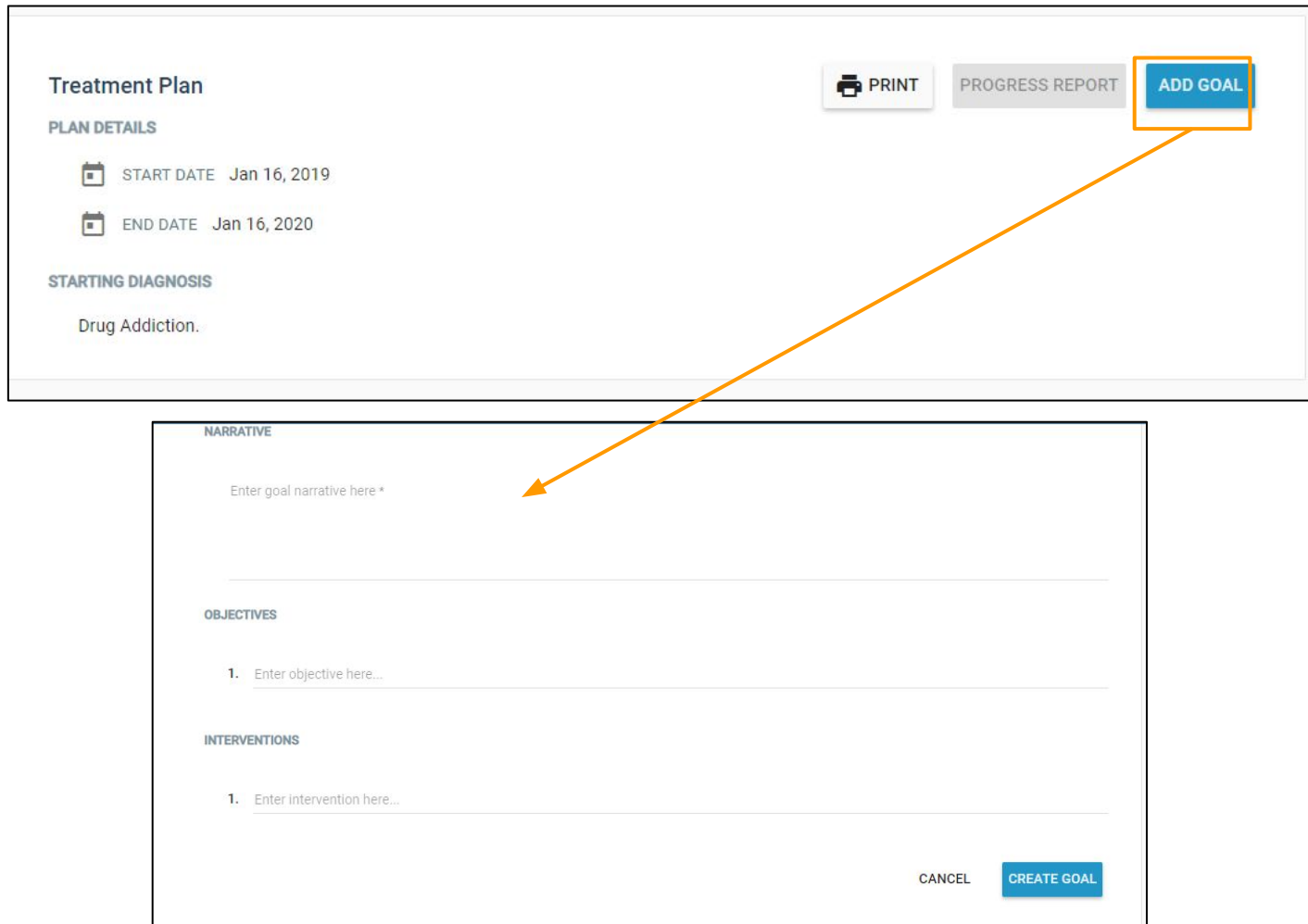
Starting Diagnosis *

Drug Addiction|

CANCEL

START PLAN

Once the Treatment Plan has been saved, the User will add Goals, Objectives, and Interventions.



The screenshot displays the 'Treatment Plan' interface. At the top right, there are three buttons: 'PRINT', 'PROGRESS REPORT', and 'ADD GOAL'. The 'ADD GOAL' button is highlighted with an orange box, and an orange arrow points from it to the 'NARRATIVE' section of the goal creation form below. The form has three main sections: 'NARRATIVE', 'OBJECTIVES', and 'INTERVENTIONS'. The 'NARRATIVE' section has a text input field with the placeholder 'Enter goal narrative here *'. The 'OBJECTIVES' section has a list item '1. Enter objective here...' with a text input field. The 'INTERVENTIONS' section has a list item '1. Enter intervention here...' with a text input field. At the bottom right of the form are 'CANCEL' and 'CREATE GOAL' buttons.

Treatment Plan

PLAN DETAILS

START DATE Jan 16, 2019

END DATE Jan 16, 2020

STARTING DIAGNOSIS

Drug Addiction.

NARRATIVE

Enter goal narrative here *

OBJECTIVES

1. Enter objective here...

INTERVENTIONS


1. Enter intervention here...

CANCEL CREATE GOAL

SURVEYS, ASSESSMENTS & GOALS - TREATMENT PLAN

Once Goals have been added to the Treatment Plan, Users can now enter and print a Progress Report.


Treatment Plan


 PRINT

PROGRESS REPORT

ADD GOAL


PLAN DETAILS


 START DATE Jan 16, 2019


 END DATE Jan 18, 2019


STARTING DIAGNOSIS


Drug Addiction

 **Goal #1**

 START DATE Jan 16, 2019

 DUE DATE

 RATING 0 of 0



Stop drug addiction to live a healthier and happier life.

OBJECTIVES

1. Be Sober

INTERVENTIONS

1. N/A

PROGRESS

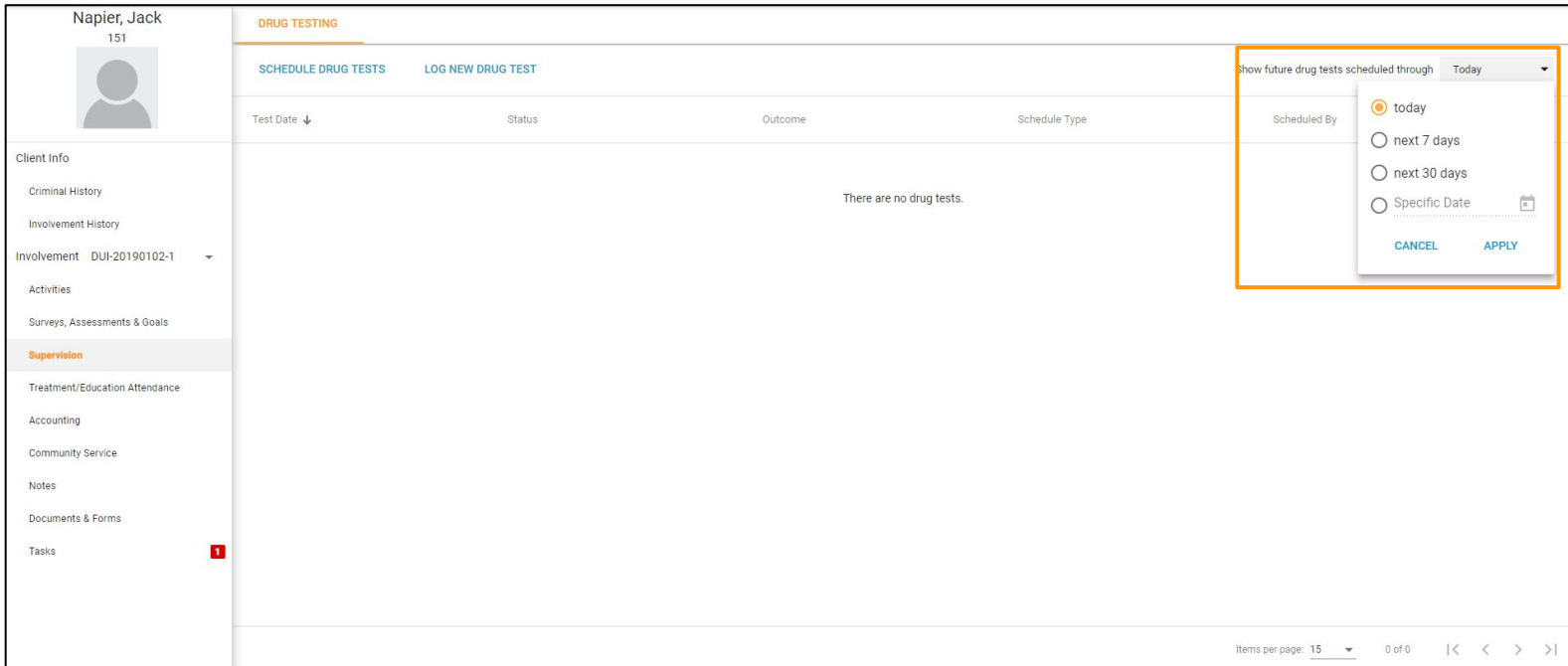
No progress reports to display for this goal

Subtopics:

1. Overview
2. Schedule Drug Test
3. Log New Drug Test
4. Complete a Schedule Drug Test
5. Viewing/Editing a Finalized Drug Test

In the Supervision Section, Users have the ability to schedule a drug test, log a new completed drug test, and complete a scheduled drug test. On the far right, Users will be defaulted to view tests scheduled through today. They have the ability to change the date filter.

In a future release, AutoMon will enhance this section to also include managing the Client's hearings and contacts.

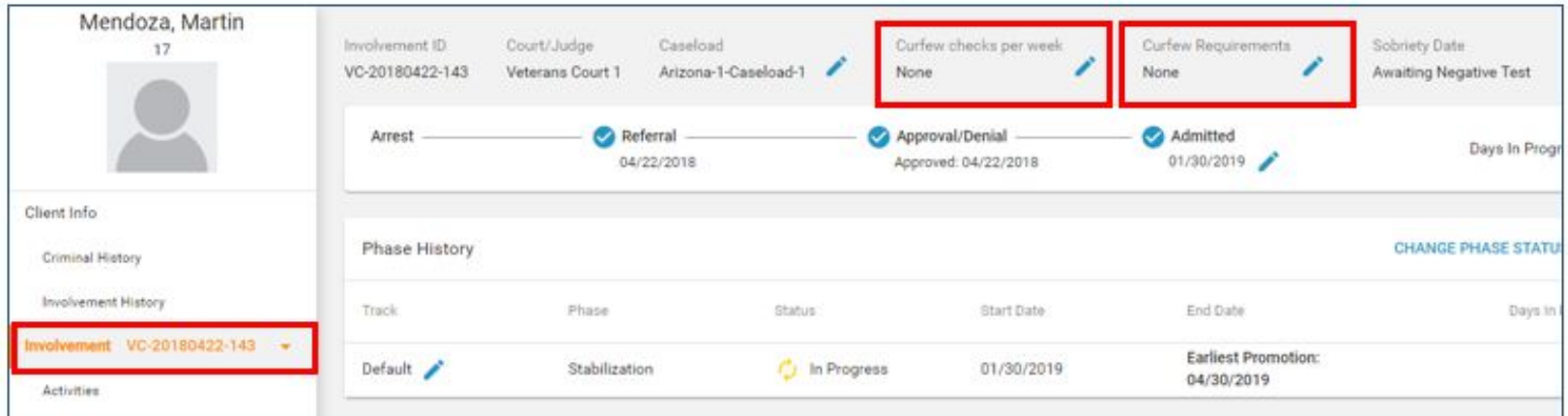


The screenshot displays the AutoMon interface for the Supervision section. On the left, a sidebar shows the user profile for Jack Napier (151) and a list of navigation items including Client Info, Criminal History, Involvement History, Involvement (DUI-20190102-1), Activities, Surveys, Assessments & Goals, Supervision (highlighted), Treatment/Education Attendance, Accounting, Community Service, Notes, Documents & Forms, and Tasks. The main content area is titled 'DRUG TESTING' and contains two buttons: 'SCHEDULE DRUG TESTS' and 'LOG NEW DRUG TEST'. Below these buttons is a table with columns for Test Date, Status, Outcome, and Schedule Type. The table is currently empty, displaying the message 'There are no drug tests.' A dropdown menu is open on the right side of the table, showing options for 'Show future drug tests scheduled through': 'today' (selected), 'next 7 days', 'next 30 days', and 'Specific Date'. The 'today' option is selected with a radio button. The dropdown also includes 'CANCEL' and 'APPLY' buttons. At the bottom right, there is a pagination bar showing 'Items per page: 15', '0 of 0', and navigation arrows.

SUPERVISION - CURFEW CHECKS

AIMS provides the ability to schedule and easily record Client Curfew Checks.

On the Client Involvement page, note that *Curfew Checks per week* and *Curfew Requirements*.



Mendoza, Martin
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Involvement ID: VC-20180422-143 | Court/Judge: Veterans Court 1 | Caseload: Arizona-1-Caseload-1 | **Curfew checks per week: None** | **Curfew Requirements: None** | Sobriety Date: Awaiting Negative Test

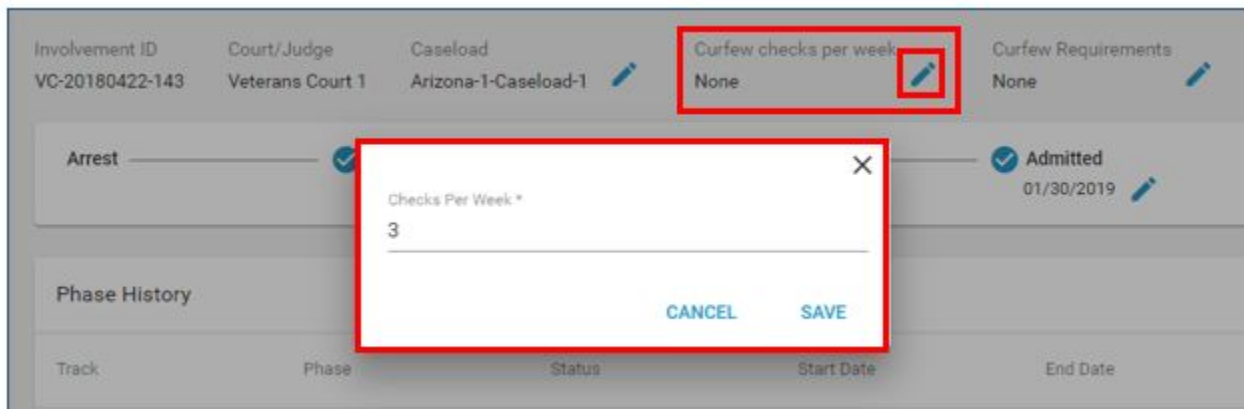
Arrest — Referral (04/22/2018) — Approval/Denial (Approved: 04/22/2018) — Admitted (01/30/2019) — Days In Progress

Client Info
Criminal History
Involvement History
Involvement: VC-20180422-143
Activities

Phase History [CHANGE PHASE STATUS](#)

Track	Phase	Status	Start Date	End Date	Days In Progress
Default	Stabilization	In Progress	01/30/2019	Earliest Promotion: 04/30/2019	

To edit the *Curfew Check per week* from the default of “None”, click the edit (pencil) icon and select the desired number of Curfew Checks per week.



Involvement ID: VC-20180422-143 | Court/Judge: Veterans Court 1 | Caseload: Arizona-1-Caseload-1 | **Curfew checks per week: None** | Curfew Requirements: None

Arrest — Referral (04/22/2018) — Approval/Denial (Approved: 04/22/2018) — Admitted (01/30/2019) — Days In Progress

Phase History [CHANGE PHASE STATUS](#)

Track	Phase	Status	Start Date	End Date	Days In Progress
Default	Stabilization	In Progress	01/30/2019	Earliest Promotion: 04/30/2019	

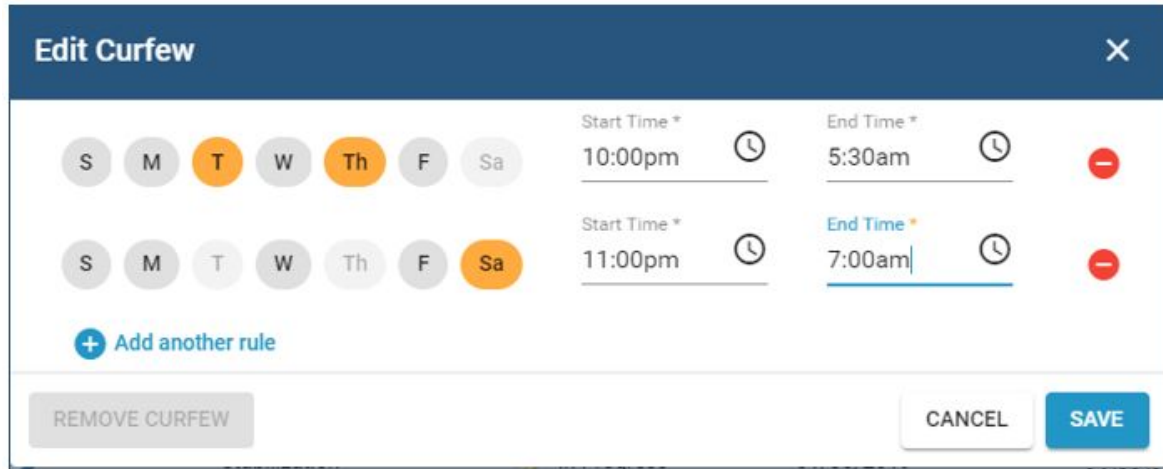
Checks Per Week *

3

[CANCEL](#) [SAVE](#)

SUPERVISION - CURFEW CHECKS

To edit *Curfew Requirements*, select the edit (pencil) icon to select the specific days of the week and time range (Start Time and End Time) the Client must adhere to curfew. The days selected will determine which days the Client will appear on the Curfew Check roster. Users have the ability to enter multiple Curfew rules, as shown below.



Edit Curfew [X]

☐ S ☐ M ☒ T ☐ W ☒ Th ☐ F ☐ Sa

Start Time * 10:00pm [Clock Icon] End Time * 5:30am [Clock Icon] [Red Minus]

☐ S ☐ M ☐ T ☐ W ☐ Th ☐ F ☒ Sa

Start Time * 11:00pm [Clock Icon] End Time * 7:00am [Clock Icon] [Red Minus]

[+ Add another rule](#)

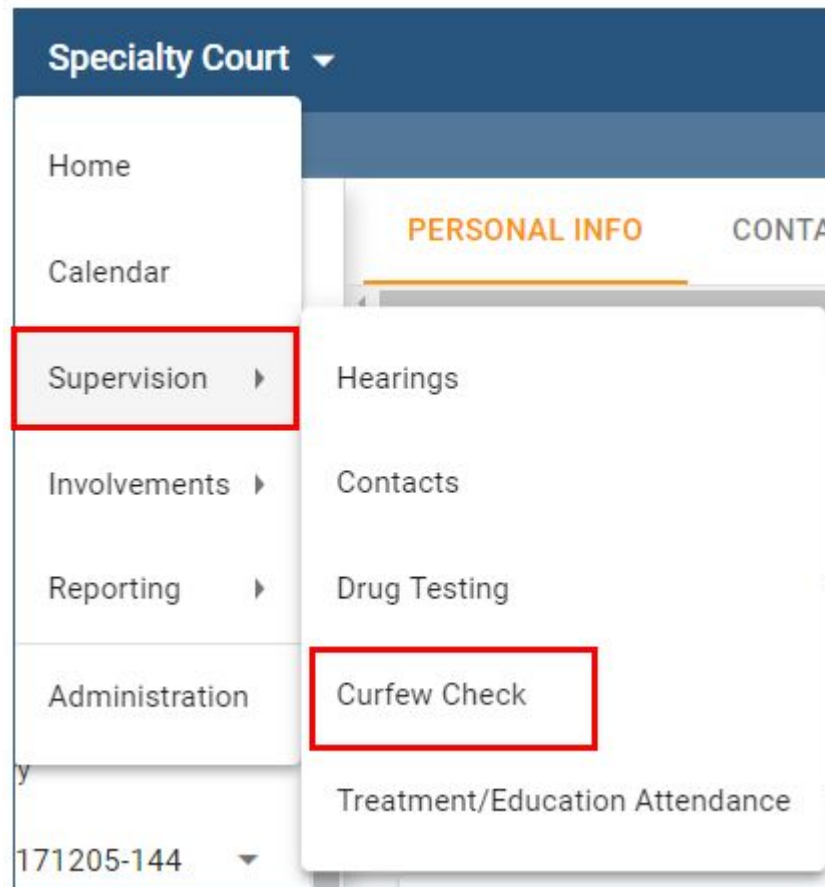
REMOVE CURFEW CANCEL SAVE

When saved, the Curfew requirements are recorded on the top menu bar

Involvement ID VC-20180422-143	Court/Judge Veterans Court 1	Caseload Arizona-1-Caseload-1 	Curfew checks per week 3 	Curfew Requirements Tues, Thu 10:00PM - 5:30AM Sat 11:00PM - 7:00AM 
-----------------------------------	---------------------------------	--	---	---

SUPERVISION - CURFEW CHECKS

Users have the ability to record Curfew Checks for a given day. From the navigation menu select Supervision --> Curfew Check











SUPERVISION - CURFEW CHECKS

Based on the date selected (default date is current date), users are presented with Clients who have a Curfew requirement for that day based on the assigned requirement for each Client. The screen will show Client/Involvement, # of Checks/week, Last Check Date, Primary Address, assigned Curfew Hours and Status (indicating if a Curfew Check has been completed on the Client for the particular date shown), Time Checked and a Notes field.

Curfew Check Date *
1/31/2019

CHANGE STATUS

<input type="checkbox"/>	Client	Checks Per Week	Last Check Date	Address	Curfew	Status	Time Checked	Notes
<input type="checkbox"/>	 Abel, Strickland DUI-20190120-1	3	None	7767 North 16th Street, Phoenix, AZ 85020	10:00PM - 6:00AM	Not Checked ▾	Time 	Notes
<input type="checkbox"/>	 Adam, Norris DUI-20180502-24	2	01/30/2019	9990 North Central Avenue, Phoenix, AZ 85021	10:00PM - 5:00AM	Not Checked ▾	Time 	Notes
<input type="checkbox"/>	 Adam, Phelps DUI-20160715-13	2	None	8221 North 7th Street, Phoenix, AZ 85020	10:00PM - 5:00AM	Not Checked ▾	Time 	Notes
<input type="checkbox"/>	 Aguilar, Moreno DUI-20170712-99	4	None	9300 North Hayden Road, Scottsdale, AZ 85258	11:00PM - 5:00AM	Not Checked ▾	Time 	Notes

Curfew Checks can be recorded for any past date or today's date where the Client has a Curfew rule established. Curfew Checks cannot be recorded for a future date, although rosters are viewable for future dates

SUPERVISION - CURFEW CHECKS

Users also have the ability to filter the Client list by Caseload or the Police Precinct associated with their primary address, as well the ability to search for a specific Client Involvement. Note that when searching by Client Involvement, if the Client does not have a Curfew requirement on the date shown, no results will be returned.

Filters

Client Involvement

Q

Caseload

☐ Arizona

☐ Arizona-1-Caseload-1

☐ Arizona-1-Caseload-2

Precinct

☐ (No Precinct)

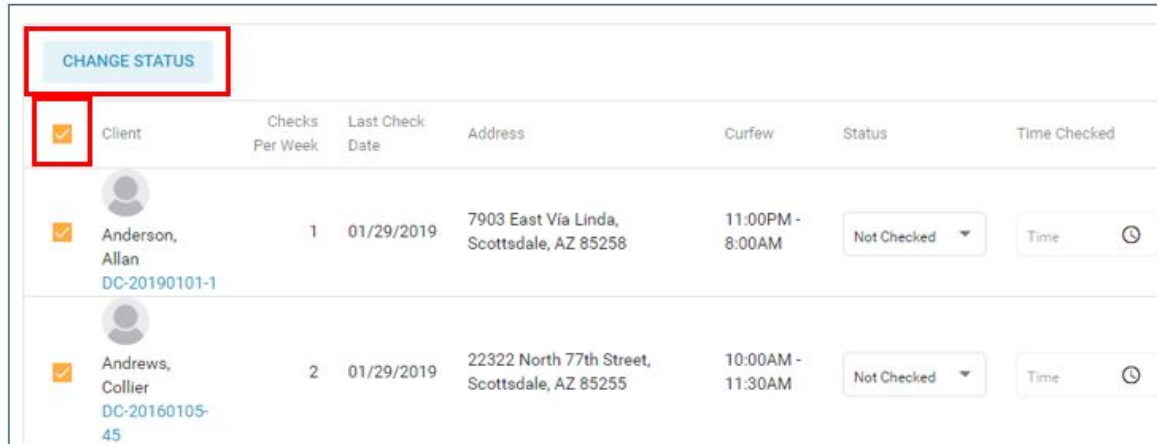
☐ Phoenix

☐ Scottsdale

SUPERVISION - RECORDING CURFEW CHECKS

Batch Entry (All Scheduled Clients)

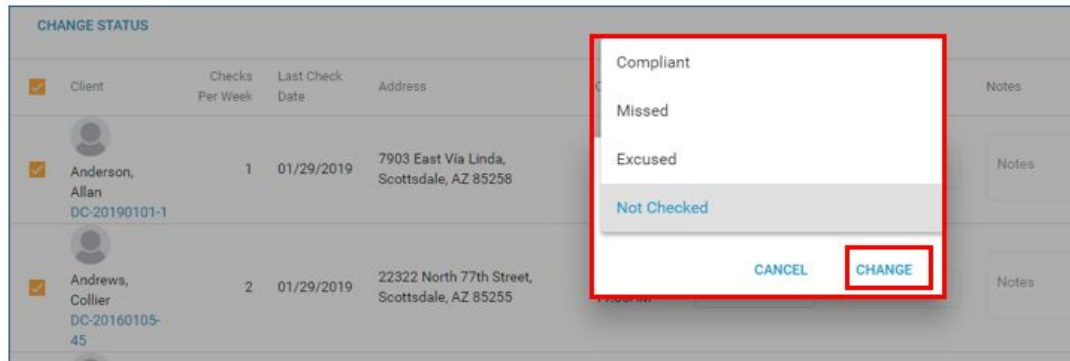
From the Curfew Check screen, users can record Curfew Checks in batch by selecting the check box immediately to the left of *Client* on the top menu (thereby selecting all Clients), then selecting *Change Status*.



The screenshot shows a table with the following columns: Client, Checks Per Week, Last Check Date, Address, Curfew, Status, and Time Checked. Two clients are listed: Anderson, Allan and Andrews, Collier. A red box highlights the 'CHANGE STATUS' button at the top left, and another red box highlights the checkbox next to the 'Client' header.

Client	Checks Per Week	Last Check Date	Address	Curfew	Status	Time Checked
<input checked="" type="checkbox"/> Anderson, Allan DC-20190101-1	1	01/29/2019	7903 East Via Linda, Scottsdale, AZ 85258	11:00PM - 8:00AM	Not Checked	Time
<input checked="" type="checkbox"/> Andrews, Collier DC-20160105-45	2	01/29/2019	22322 North 77th Street, Scottsdale, AZ 85255	10:00AM - 11:30AM	Not Checked	Time

Users will then be presented with a dialog to select the new status for all Clients scheduled for a Curfew Check for the scheduled date – Compliant, Missed, Excused or Not Checked.



The screenshot shows the 'CHANGE STATUS' dialog box with a list of options: Compliant, Missed, Excused, and Not Checked. The 'CHANGE' button is highlighted with a red box.

Client	Checks Per Week	Last Check Date	Address	Notes
<input checked="" type="checkbox"/> Anderson, Allan DC-20190101-1	1	01/29/2019	7903 East Via Linda, Scottsdale, AZ 85258	
<input checked="" type="checkbox"/> Andrews, Collier DC-20160105-45	2	01/29/2019	22322 North 77th Street, Scottsdale, AZ 85255	







SUPERVISION - RECORDING CURFEW CHECKS

Batch Entry (All Scheduled Clients, Continued)

Once the new Status has been selected and the User selects *Change*, the Status for all Clients will be changed.

Curfew Check Date *
1/30/2019

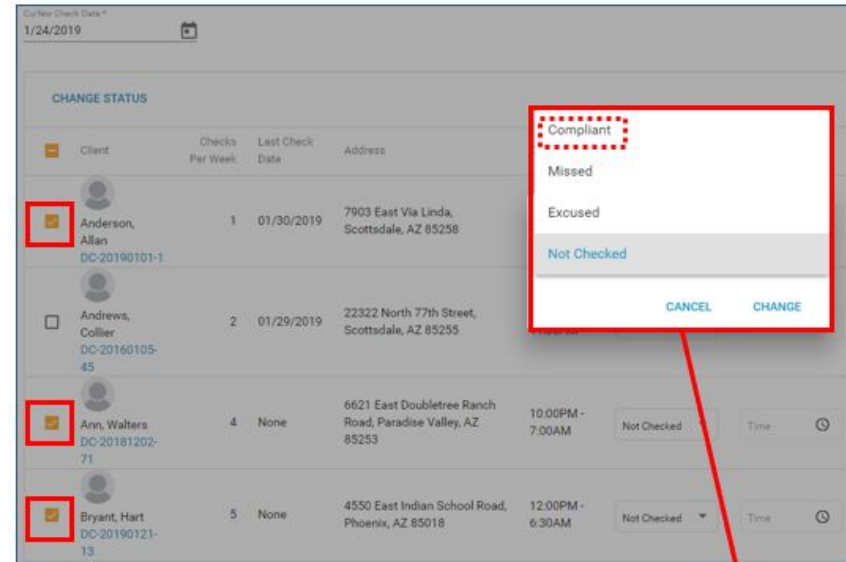
CHANGE STATUS

<input checked="" type="checkbox"/>	Client	Checks Per Week	Last Check Date	Address	Curfew	Status	Time Checked	Notes
<input checked="" type="checkbox"/>	 Anderson, Allan DC-20190101-1	1	01/29/2019	7903 East Via Linda, Scottsdale, AZ 85258	11:00PM - 8:00AM	Compliant ▼	Time 	Notes
<input checked="" type="checkbox"/>	 Andrews, Collier DC-20160105-45	2	01/29/2019	22322 North 77th Street, Scottsdale, AZ 85255	10:00AM - 11:30AM	Compliant ▼	Time 	Notes
<input checked="" type="checkbox"/>	 Ann, Walters DC-20181202-71	4	None	6621 East Doubletree Ranch Road, Paradise Valley, AZ 85253	10:00PM - 7:00AM	Compliant ▼	Time 	Notes

SUPERVISION - RECORDING CURFEW CHECKS

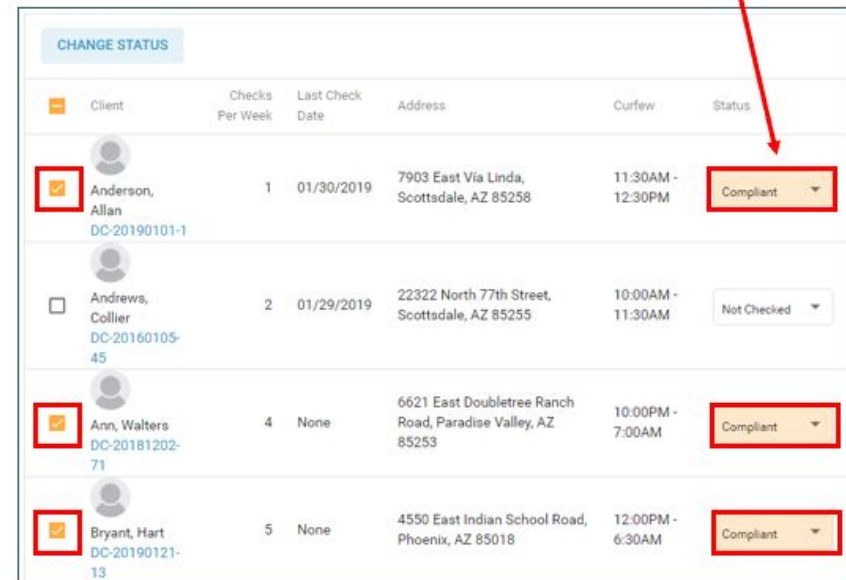
Multiple Clients Selected

Users can also select multiple Clients to record the same status for each with one action, similar to the bulk function. Once changing the Status for the group of Clients (Compliant, Missed, Excused or Not Checked), Users then record the Time Checked for each Client and corresponding Notes related to the Curfew Check.



The screenshot shows the 'Curfew Check Data' form for 1/24/2019. It features a table with columns: Client, Checks Per Week, Last Check Date, and Address. Four clients are listed: Anderson, Allan; Andrews, Collier; Ann, Walters; and Bryant, Hart. Each client has a checkbox in the first column. A red box highlights the 'CHANGE STATUS' button. A dropdown menu is open, showing options: Compliant (highlighted with a red dashed box), Missed, Excused, and Not Checked. The 'CHANGE' button is at the bottom right of the dropdown.

Client	Checks Per Week	Last Check Date	Address
<input checked="" type="checkbox"/> Anderson, Allan DC-20190101-1	1	01/30/2019	7903 East Via Linda, Scottsdale, AZ 85258
<input type="checkbox"/> Andrews, Collier DC-20160105-45	2	01/29/2019	22322 North 77th Street, Scottsdale, AZ 85255
<input checked="" type="checkbox"/> Ann, Walters DC-20181202-71	4	None	6621 East Doubletree Ranch Road, Paradise Valley, AZ 85253
<input checked="" type="checkbox"/> Bryant, Hart DC-20190121-13	5	None	4550 East Indian School Road, Phoenix, AZ 85018



The screenshot shows the 'Curfew Check Data' form with the status dropdown menu for each client. The status is set to 'Compliant' for all selected clients. A red arrow points from the 'CHANGE STATUS' button in the previous screenshot to the 'Compliant' status dropdown for the first client.


Client	Checks Per Week	Last Check Date	Address	Curfew	Status
<input checked="" type="checkbox"/> Anderson, Allan DC-20190101-1	1	01/30/2019	7903 East Via Linda, Scottsdale, AZ 85258	11:30AM - 12:30PM	Compliant
<input type="checkbox"/> Andrews, Collier DC-20160105-45	2	01/29/2019	22322 North 77th Street, Scottsdale, AZ 85255	10:00AM - 11:30AM	Not Checked
<input checked="" type="checkbox"/> Ann, Walters DC-20181202-71	4	None	6621 East Doubletree Ranch Road, Paradise Valley, AZ 85253	10:00PM - 7:00AM	Compliant
<input checked="" type="checkbox"/> Bryant, Hart DC-20190121-13	5	None	4550 East Indian School Road, Phoenix, AZ 85018	12:00PM - 6:30AM	Compliant

SUPERVISION - RECORDING CURFEW CHECKS

Recording Curfew Checks for an Individual Client



To complete a Curfew Check on one individual Client, Users would change the Status for the individual Client, record the Time Checked and any associated Notes.


CHANGE STATUS

<input type="checkbox"/>	Client	Checks Per Week	Last Check Date	Address	Curfew	Status	Time Checked	Notes
<input type="checkbox"/>	 Anderson, Allan DC-20190101-1	1	01/30/2019	7903 East Via Linda, Scottsdale, AZ 85258	11:00PM - 8:00AM	Compliant ▼	1:30am ⌚	Allan was present for curfew check - no identified issues









SUPERVISION - RECORDING CURFEW CHECKS


When recording Curfew Checks in all three scenarios – bulk, group/multiple or for an individual Client – Users ***must SAVE*** to record the changes that have been made. Any field shown in orange is data that will be saved to the Client record.



CANCEL **SAVE**

Curfew Check Date *
 1/30/2019 

CHANGE STATUS

<input type="checkbox"/>	Client	Checks Per Week	Last Check Date	Address	Curfew	Status	Time Checked	Notes
<input type="checkbox"/>	 Anderson, Allen DC-20190101-1	1	01/30/2019	7903 East Via Linda, Scottsdale, AZ 85258	11:00PM - 8:00AM	Compliant	None	
<input type="checkbox"/>	 Andrews, Collier DC-20160109-45	2	01/29/2019	22322 North 77th Street, Scottsdale, AZ 85255	10:00AM - 11:30AM	Compliant	10:30am 	Notes
<input type="checkbox"/>	 Ann, Wihers DC-20181202-71	4	None	6621 East Doubletree Ranch Road, Paradise Valley, AZ 85253	10:00PM - 7:00AM	Excused	Time 	Notes
<input type="checkbox"/>	 Bryant, Hart DC-20190121-13	5	None	4550 East Indian School Road, Phoenix, AZ 85018	12:00PM - 6:30AM	Compliant	2:30am 	Notes

Filters
 Client Involvement 
 Caseload
☐ Arizona
☐ Arizona-1-Caseload-1
 Precinct
☐ (No Precinct)
☐ Phoenix
☐ Scottsdale

SUPERVISION - RECORDING CURFEW CHECKS

Any Notes recorded with a Curfew Check are indicated next to the Notes icon, indicating the number of Notes associated with that specific Curfew Check.

	Anderson, Allan DC- 20190101-1	1	01/30/2019	7903 East Via Linda, Scottsdale, AZ 85258	11:00PM - 8:00AM	Compliant	6:00AM	(2)
--	---	---	------------	---	---------------------	-----------	--------	-----

Clicking on the Notes icon will display all Notes associated with the Curfew Check.

Curfew Check Date *
1/30/2019

CHANGE STATUS

<input type="checkbox"/>	Client	Checks Per Week	Last Check Date	Address	Curfew	Status	Time Checked	Notes
<input type="checkbox"/>	 Anderson, Allan DC- 20190101-1	1	01/30/2019	7903 East Via Linda, Scottsdale, AZ 85258	11:00PM - 8:00AM	Compliant	6:00AM	(2)

Notes: Curfew Check 01/30/2019: Compliant

Scot Asher 01/30/2019 1:19PM:

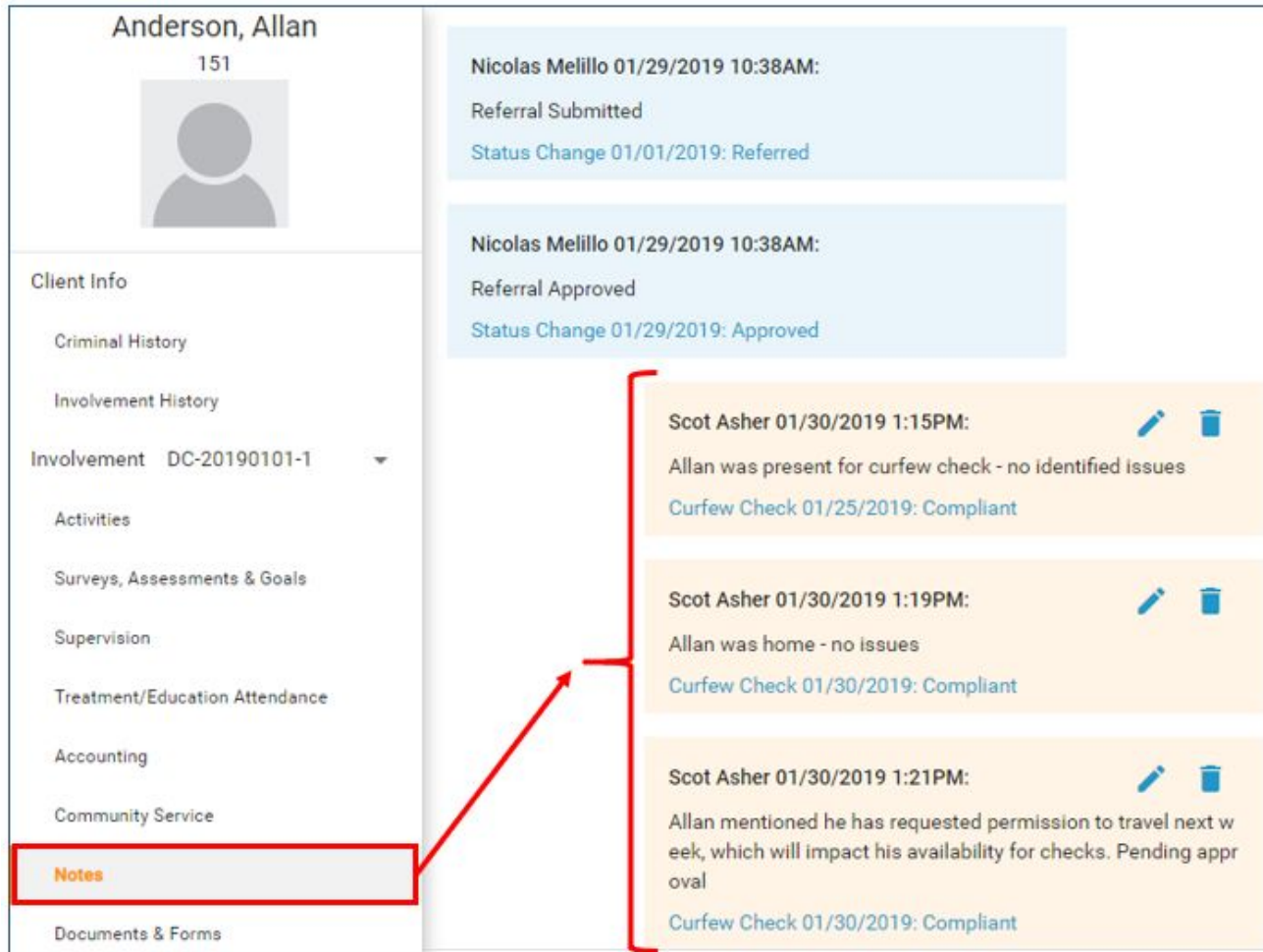
Allan was home - no issues
 Curfew Check 01/30/2019: Compliant

Scot Asher 01/30/2019 1:21PM:

Allan mentioned he has requested permission to travel next week, which will impact his availability for checks. Pending approval.
 Curfew Check 01/30/2019: Compliant

SUPERVISION - RECORDING CURFEW CHECKS

Notes recorded during a Curfew Check are also viewable from the Client's page --> Notes.



Anderson, Allan
151

Client Info

- Criminal History
- Involvement History
- Involvement DC-20190101-1
- Activities
- Surveys, Assessments & Goals
- Supervision
- Treatment/Education Attendance
- Accounting
- Community Service
- Notes**
- Documents & Forms

Nicolas Melillo 01/29/2019 10:38AM:
Referral Submitted
[Status Change 01/01/2019: Referred](#)

Nicolas Melillo 01/29/2019 10:38AM:
Referral Approved
[Status Change 01/29/2019: Approved](#)

Scot Asher 01/30/2019 1:15PM:
Allan was present for curfew check - no identified issues
[Curfew Check 01/25/2019: Compliant](#)

Scot Asher 01/30/2019 1:19PM:
Allan was home - no issues
[Curfew Check 01/30/2019: Compliant](#)


Scot Asher 01/30/2019 1:21PM:
Allan mentioned he has requested permission to travel next week, which will impact his availability for checks. Pending approval
[Curfew Check 01/30/2019: Compliant](#)

SUPERVISION - RECORDING CURFEW CHECKS

Curfew Checks – and the status of the Check (i.e., Compliant, Missed, Excused) – are also recorded under Activities.

Andrews, Collier

44



Client Info

Criminal History

Involvement History

Involvement DC-20160105-45

Activities

Surveys, Assessments & Goals

Supervision

Treatment/Education Attendance

Accounting

Community Service


Notes


Documents & Forms


Tasks







Activities will be deprecated soon, please use notes instead. [GO TO NOTES](#)

+



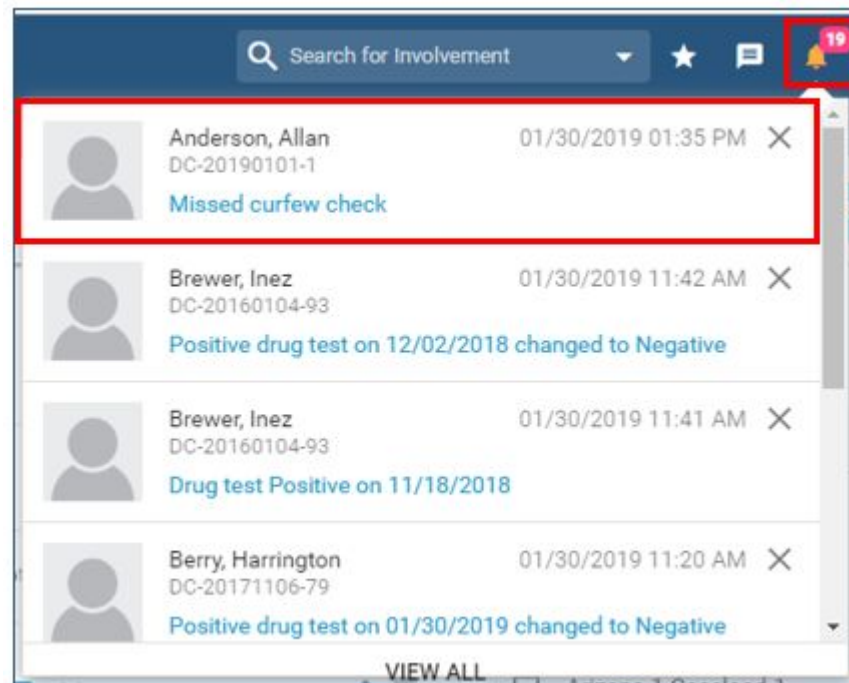




Date ↓	Type	Notes	Description	Action By
TODAY & UPCOMING				
02/06/2019	Drug Test		Drug test passed	System
01/31/2019	Drug Test		Drug test passed	System
01/30/2019	Curfew Check		Curfew Check Compliant	Scot Asher
OLDER THAN TODAY				
01/29/2019	Curfew Check		Curfew Check Excused	Brian Fox
01/29/2019	Curfew Check		Curfew Check Missed	Nicolas Melillo
01/23/2019	Drug Test		Drug test passed	System
01/15/2019	Drug Test		Drug test passed	System
01/08/2019	Drug Test		Negative	System
01/04/2019	Drug Test		Drug test passed	System

SUPERVISION - RECORDING CURFEW CHECKS

Missed Curfew Checks are recorded as Infractions and will generate a Notification (if subscribed).



Compliant Curfew Checks are marked as an Achievement, and no Notification is generated; a Curfew Check recorded as *Excused* will cause no actions on Infractions, Achievements or Notifications.

Editing a Completed Curfew Check

Users with the Edit Curfew Checks permission have the ability to edit a previously recorded Curfew Check – if a User does not have the permission to edit Curfew Checks, the Change Status, Cancel and Save buttons are disabled.

Editing a previously completed Curfew Check will:

- Remove any infraction or achievement that was caused by the previous status;
- Create the appropriate infractions or achievements based on the new status;
- If the change was from "Missed" to "Compliant" or "Excused", a "Missed Curfew Changed" notification is also sent (if User is Subscribed);
- If the status was changed to "Not Checked" the check will be deleted and the list item will appear as if it had never been saved previously (i.e., editable).

SUPERVISION - SCHEDULE DRUG TESTS

Users have the ability to schedule an individual drug test within the Supervision section by clicking on the *Schedule Drug Test* hyperlink. Users will be presented with a dialog box that will allow them to select the date and frequency. Users can also schedule just one individual drug test by indicating the test should end after one (1) occurrence. This function can also be performed from the Calendar view as well as from the Drug Testing Tasks list.

Schedule Individual Drug Test

×

Test Date *
 1/17/2019

☐ Repeat every 1 days
 ☐ Ends after 1 occurrences
 ☐ Ends on
 ☐ Never ends

CANCEL

SCHEDULE

DRUG TESTING					
SCHEDULE DRUG TESTS		LOG NEW DRUG TEST		Show future drug tests scheduled through Today	
Test Date ↓	Status	Outcome	Schedule Type	Scheduled By	
01/17/2019	Scheduled	None	By Individual	emarin@automon.com	

SUPERVISION - LOG NEW DRUG TEST

When clicking on the *Log New Drug Test* hyperlink, Users have the ability to record a completed test (that was not already scheduled). The User is required to select a collection date and an outcome. If the test was sent to the Lab for verification, the User can indicate that by checking the Lab verification checkbox and will be required to enter a specimen ID.

Log New Drug Test

Collection Date *
1/16/2019

Outcome *
Diluted

Testing Device
5 Panel Cup

Notes

Test Result Details

Panel	Detected	Level	Cutoff	Units	Approved Prescription Level	Outcome
AMP	<input type="checkbox"/>					Negative
BAR	<input type="checkbox"/>					Negative
COC	<input type="checkbox"/>					Negative
OPI	<input type="checkbox"/>					Negative
THC	<input type="checkbox"/>					Negative

+ Add Another Result

☒ Sent for lab verification

Specimen ID *
12345

CANCEL

LOG

SUPERVISION - COMPLETING A DRUG TEST

If the test was scheduled, then Users would expand the drug test row to mark the scheduled drug test complete. Users can also perform this function from the Drug Tests Task listing.


DRUG TESTING					
SCHEDULE DRUG TESTS	LOG NEW DRUG TEST	Show future drug tests scheduled through Today ▼			
Test Date ↓	Status	Outcome	Schedule Type	Scheduled By	
01/17/2019	Scheduled	None	By Individual	emarin@automon.com	▼
01/16/2019	Pending Lab Verification	Diluted	By Individual		▼

DRUG TESTING

[SCHEDULE DRUG TESTS](#)
[LOG NEW DRUG TEST](#)

Show future drug tests scheduled through Today ▼

Test Date ↓	Status	Outcome	Schedule Type	Scheduled By
01/17/2019	Scheduled	None	By Individual	emarin@automon.com



Napier, Jack
 DUI-20190102-1

Schedule Type

By Individual

Scheduled By

emarin@automon.com

Repeat Schedule

Never

Collection Date

Jan 17, 2019

Outcome *

▼

Testing Device

▼

Notes

☐ Sent for lab verification

Specimen ID



.....

CANCEL

SAVE

SUPERVISION - VIEWING/EDITING A FINALIZED TEST

Once the test has been completed, the status of the test will reflect as *Finalized*. Users still have the ability to edit a finalized test by expanding the test and clicking on the pen icon. Users can perform this function from the Drug Tests Task listing as well.

DRUG TESTING				
SCHEDULE DRUG TESTS LOG NEW DRUG TEST		Show future drug tests scheduled through Today ▼		
Test Date ↓	Status	Outcome	Schedule Type	Scheduled By
01/17/2019	Finalized	Negative	By Individual	emarin@automon.com
<div> <div>  <div> Napier, Jack DUI-20190102-1 </div> </div> <div> Final Outcome Negative </div> <div> Schedule Type By Individual </div> <div> Scheduled By emarin@automon.com </div> </div> <div> Collection Date 01/17/2019 </div> <div> Initial Outcome Negative </div> <div> Testing Device N/A </div> <div> Notes  </div> <div> Test Result Details There are no results for this drug test </div> <div> Documents There are no documents for this drug test </div>				



TOPIC 19: TREATMENT/EDUCATION ATTENDANCE

Subtopics:

1. Overview
2. Treatment Session Requirements
3. Program Enrollment
4. Treatment Attendance

TREATMENT/EDUCATION - OVERVIEW

Under the Treatment/Education Attendance section, Users have the ability to add session requirements, enroll the Client into a Program, and mark attendance. This section is specific to treatment and/or education sessions.

<div> <div>Napier, Jack</div> <div>151</div> <div></div> <div>Client Info</div> <div>Criminal History</div> <div>Involvement History</div> <div>Involvement DUI-20190102-1</div> <div>Activities</div> <div>Surveys, Assessments & Goals</div> <div>Supervision</div> <div>Treatment/Education Attendance</div> </div>	<div> <div>TREATMENT SESSION REQUIREMENTS</div> <div>PROGRAM ENROLLMENT</div> <div>TREATMENT ATTENDANCE</div> </div>
	<div> <div>ADD SESSION REQUIREMENT</div> <div></div> </div>
	<div> <div>Session Type ↑</div> <div>End By</div> <div>Attendance Compliance</div> </div>
	<div>No session requirements found</div>

TREATMENT/EDUCATION - SESSION REQUIREMENTS

When clicking the Add Session Requirement hyperlink, Users have the ability to add Session requirements for a specific Client. The User will be required to select a Session Type, number of hours per either week or month, a start date, and an end date. The end date can be a specific date at the end of the week or month, or at the end of the current Phase.

Add Session Requirement

Session Type *

Group therapy

Frequency *

8

#

hours per

week

Start Date *

1/13/2019

End by *

Phase

End Date



CANCEL

ADD

TREATMENT SESSION REQUIREMENTS	PROGRAM ENROLLMENT	TREATMENT ATTENDANCE
ADD SESSION REQUIREMENT		
Session Type ↑	End By	Attendance Compliance
<input type="checkbox"/> Cognitive Behavioral Therapy	End of Stabilization Phase	0 of 1 compliant
<input type="checkbox"/> Counseling	01/19/2019	0 of 1 compliant
<input type="checkbox"/> Group therapy	End of Stabilization Phase	0 of 1 compliant

TREATMENT/EDUCATION - SESSION REQUIREMENTS

Users can expand the Session Requirement to edit the requirements. Users can also click on the checkbox on the left hand side to delete the Session Requirement. The system will indicate if the Client is compliant with their Session Requirement, based on the treatment attendance that has been recorded. This is important to know so Users can ensure attendance is being updated regularly. Non-compliance will display as an infraction. Compliance will display as an achievement on the Hearing Status review.

TREATMENT SESSION REQUIREMENTS		PROGRAM ENROLLMENT	TREATMENT ATTENDANCE
ADD SESSION REQUIREMENT			
Session Type ↑	End By	Attendance Compliance	
<input type="checkbox"/> Cognitive Behavioral Therapy	End of Stabilization Phase	0 of 1 compliant	
Compliance			
Interval ↓	Requirement 	Attendance Compliance	Completed Hours
Month starting 01/01/2019	15 hours per month	In Progress	0 hours
			Remaining Hours
			15 hours
Items per page: 10 1 - 1 of 1 < < > >			
<input checked="" type="checkbox"/> Counseling	01/19/2019	0 of 1 compliant	
<input type="checkbox"/> Group therapy	End of Stabilization Phase	0 of 1 compliant	

TREATMENT/EDUCATION - SESSION REQUIREMENTS

As mentioned, the system will automatically display attendance compliance, based on the treatment attendance that has been entered once the requirement week or month has passed. Users can still update treatment attendance (if attendance had not been recorded in time) using the *Treatment Attendance* hyperlink. Once the appropriate attendance has been recorded, the compliance status will update accordingly.

TREATMENT SESSION REQUIREMENTS

PROGRAM ENROLLMENT

TREATMENT ATTENDANCE

ADD SESSION REQUIREMENT

Session Type

↓

End By

Attendance Compliance

☐

Individual Counseling

End of Stabilization Phase

2 of 2 compliant

▼

☐

Support Group

End of Stabilization Phase

2 of 3 compliant

▲

Compliance

Interval

↓

Requirement

Attendance Compliance

Completed Hours

Remaining Hours

Week starting 06/25/2018

7 hours per week

In Progress

3 hours

4 hours

Week starting 06/18/2018

7 hours per week

Noncompliant

5 hours

2 hours

Week starting 06/13/2018

7 hours per week

Compliant

7 hours

0 hours

Week starting 06/06/2018

3 hours per week

Compliant

3 hours

0 hours

Items per page:

25

1 - 18 of 18

<

>

TREATMENT/EDUCATION - PROGRAM ENROLLMENT

Once the Client has been set up with Session Requirement, Users would then enroll the Client into the Program they will be participating in, in order to meet those session requirements. The User would click on the *Add Program* hyperlink to enroll the Client. Users can also enroll the Client from the batch Treatment/Education Attendance listing.


TREATMENT SESSION REQUIREMENTS	PROGRAM ENROLLMENT	TREATMENT ATTENDANCE
ADD PROGRAM		
Program ↑	Status	Status Date
No programs found		

Add Program ×

Program *

Generic Recovery Program ▼

Start Date


1/17/2019 

CANCEL

ADD

TREATMENT/EDUCATION - PROGRAM ENROLLMENT

Users can edit the status of the Program Enrollment when the Client will no longer participate in the specific program by clicking on the pen icon.

TREATMENT SESSION REQUIREMENTS		PROGRAM ENROLLMENT	TREATMENT ATTENDANCE
ADD PROGRAM			
Program ↑		Status	Status Date
Generic Recovery Program	Enrolled		01/17/2019

Edit Status

Status *

Unenrolled

Status Date

1/17/2019

CANCEL

SAVE

TREATMENT/EDUCATION - TREATMENT ATTENDANCE

Users can log Treatment Attendance by clicking on the Log Attendance hyperlink. Users can also perform this function on the Batch Treatment Attendance Task listing. When logging attendance, Users are required to enter the attendance date, status (Completed, Excused, or Missed), session type, program, session length and can make additional notes.

In a future release, AutoMon will add the ability to record the facilitator of the session when logging attendance.

TREATMENT SESSION REQUIREMENTS	PROGRAM ENROLLMENT	TREATMENT ATTENDANCE			
<div>LOG ATTENDANCE</div>					
Date ↓	Session Type	Program	Status	Session Length	Notes
No attendance found					

Log Attendance

Attendance Date *
1/17/2019

Status *
Completed

Session Type *

Program *

Session Length *
hours







Notes

CANCEL







LOG

TREATMENT/EDUCATION - TREATMENT ATTENDANCE

Users can click on the More icon on the right side of the attendance row to either edit the attendance or delete the attendance. Compliance will be recalculated based on any changes made.

TREATMENT SESSION REQUIREMENTS	PROGRAM ENROLLMENT	TREATMENT ATTENDANCE				
LOG ATTENDANCE						
Date ↓	Session Type	Program	Status	Session Length	Notes	
01/17/2019	Counseling	Generic Recovery Program	✓ Completed	4 hours		<div><div> Edit Attendance  Delete Attendance</div></div>
01/17/2019	Counseling	Generic Recovery Program	✓ Completed	3 hours		
01/17/2019	Cognitive Behavioral Therapy	Generic Recovery Program	✗ Missed	2 hours	 (1)	

If additional notes were recorded when logging attendance, the Notes icon will display a number in parenthesis next to the Note icon. This reflects how many notes are linked to that event. “Notes” is a common a feature throughout the application and will be discussed in more detail later in this guide.

TREATMENT SESSION REQUIREMENTS	PROGRAM ENROLLMENT	TREATMENT ATTENDANCE			
LOG ATTENDANCE					
Date ↓	Session Type	Program	Status	Session Length	Notes
01/17/2019	Counseling	Generic Recovery Program	✓ Completed	4 hours	 
01/17/2019	Counseling	Generic Recovery Program	✓ Completed	3 hours	 
01/17/2019	Cognitive Behavioral Therapy	Generic Recovery Program	✗ Missed	2 hours	 (1) 

TREATMENT/EDUCATION - TREATMENT ATTENDANCE

Users can click on the *Note* icon to see the note details. Users can also add additional notes from this screen, as well. The new note will also be linked to the same attendance link. Users can only edit or delete their own notes.

THE LAST PHASE.

TREATMENT SESSION REQUIREMENTS

PROGRAM ENROLLMENT

TREATMENT ATTENDANCE

LOG ATTENDANCE

Date ↓	Session Type	Program	Status	Session Length
01/17/2019	Counseling	Generic Recovery Program	✓ Completed	4 hours
01/17/2019	Counseling	Generic Recovery Program	✓ Completed	3 hours
01/17/2019	Cognitive Behavioral Therapy	Generic Recovery Program	✗ Missed	2 hours

Notes: Attendance 01/17/2019: Generic Recovery Program

Eileen Marin 01/17/2019 7:51AM:

Client did not call or show up to session.

Attendance 01/17/2019: Generic Recovery Program

Attendance 01/17/2019: Generic Recovery Program

Associate Items to Note







ADD

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TREATMENT/EDUCATION - TREATMENT ATTENDANCE

Users have the ability to filter the Attendance log by clicking on the Filter icon. Users can filter attendance by date, session type, program, status, or session length. The attendance listing will update accordingly based on the Users filter.


TREATMENT SESSION REQUIREMENTS						
PROGRAM ENROLLMENT						
TREATMENT ATTENDANCE						
LOG ATTENDANCE						
Date ↓	Session Type	Program	Status	Session Length	Notes	
<div> <div> <div></div> <div></div> </div> <div> <div></div> <div></div> </div> </div>						
01/17/2019	Counseling	Generic Recovery Program	✓ Completed	4 hours		
01/17/2019	Counseling	Generic Recovery Program	✓ Completed	3 hours		
01/17/2019	Cognitive Behavioral Therapy	Generic Recovery Program	✗ Missed	2 hours	 (2)	

Subtopics:

1. Overview
2. Obligations
3. Add Charge
4. Editing Payment Plan
5. Suspend Payment Plan
6. Reinstate Payment Plan
7. Add Credit
8. Payments
9. Printing Reports

ACCOUNTING - OBLIGATIONS

To add a new Obligation, Users would click on the Add Obligation hyperlink. The User would then select the Obligation type, add notes, and indicate the amount. Users can also set up a payment plan in where the Client would be automatically billed a certain amount either weekly or monthly.



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Client Info

Criminal History

Involvement History

Involvement DUI-20190102-1

Activities

Surveys, Assessments & Goals

Supervision

Treatment/Education Attendance

Accounting

OBLIGATIONS PAYMENTS

ADD OBLIGATION ADD PAYMENT

<input type="checkbox"/>	ID	Open Date ↓	Obligation Type	Charges	Billed	Payments	Total Amount Due	Current Amount Due
No obligations found								

← Accounting

CANCEL SAVE

Obligation Type *

Program Fee

Notes

Total Amount Due \$1,800.00

Type	Date	Amount
Charge	1/17/2019	\$ 1800

+ Add another

Total Amount Due \$1,800.00

Payment Plan

Billing Frequency * Weekly

Weekly Amount * \$ 25

Start Date * 1/17/2019

ACCOUNTING - ADDING CHARGES

Once an Obligation has been created, the User can click on the Obligation ID in order to add a Charge. The User can then select the + *Add Another* hyperlink and select Charge. A Charge will increase the amount due.

OBLIGATIONS		PAYMENTS						
ADD OBLIGATION		ADD PAYMENT						
<input type="checkbox"/>	ID	Open Date ↓	Obligation Type	Charges	Billed	Payments	Total Amount Due	Current Amount Due
<input type="checkbox"/>	100000	01/17/2019	Program Fee	\$1,800.00	\$25.00	\$0.00	\$1,800.00	\$25.00

← Accounting
 CANCEL
SAVE

Obligation 100000

Obligation Type: Program Fee
 Notes: +

Total Amount Due: \$2,000.00
 Current Amount Due: \$25.00

Type	Date	Amount
Charge	01/17/2019	\$1,800.00
Charge ▼	1/17/2019 📅	\$ <input type="text" value="200"/> 200 + −

+ Add another

Total	\$2,000.00
+ Total Payments	\$0.00
Total Amount Due	\$2,000.00

ACCOUNTING - ADDING CREDITS

Once an obligation has been created, the User can click on the Obligation ID in order to add a Credit. The User can then select the + *Add Another* hyperlink and select Credit. A Credit will decrease the amount due.

OBLIGATIONS		PAYMENTS						
ADD OBLIGATION		ADD PAYMENT						
<input type="checkbox"/>	ID	Open Date ↓	Obligation Type	Charges	Billed	Payments	Total Amount Due	Current Amount Due
<input type="checkbox"/>	100000	01/17/2019	Program Fee	\$1,800.00	\$25.00	\$0.00	\$1,800.00	\$25.00

← Accounting

CANCEL SAVE

Obligation 100000

Obligation Type

Notes

Program Fee

Total Amount Due

Current Amount Due

\$1,600.00

\$25.00

Type	Date	Amount
Charge	01/17/2019	\$1,800.00
Credit	1/17/2019	\$200.00

+ Add another

\$

200

Total	\$1,600.00
+ Total Payments	\$0.00
Total Amount Due	\$1,600.00

ACCOUNTING - EDITING PAYMENT PLAN

Once an Obligation has been created, the User can click on the Obligation ID in order to edit the Payment Plan. The User would click on the pen icon under the Payment Plan section to edit the plan details.

OBLIGATIONS		PAYMENTS						
ADD OBLIGATION		ADD PAYMENT						
<input type="checkbox"/>	ID	Open Date ↓	Obligation Type	Charges	Billed	Payments	Total Amount Due	Current Amount Due
<input type="checkbox"/>	100000	01/17/2019	Program Fee	\$1,800.00	\$25.00	\$0.00	\$1,800.00	\$25.00

Payment Plan
 Bill \$25.00 a week starting 01/17/2019  [SUSPEND PAYMENT PLAN](#)

Bill	Bill Date	Amount
1	01/17/2019	\$25.00


Items per page: 10 1 - 1 of 1 < >

Total Billed	\$25.00
+ Total Payments	\$0.00
Current Amount Due	\$25.00

Edit Billing ×

Changes to the billing schedule will only effect future billings.

Billing Frequency * Weekly Amount * Start Date *

Weekly \$ 25 1/17/2019 

[CANCEL](#) [SAVE](#)

ACCOUNTING - SUSPEND PAYMENT PLAN

Once an Obligation has been created, the User can click on the Obligation ID in order to suspend the Payment Plan. The User would click on the *Suspend Payment Plan* button. Suspending the Payment Plan will stop the automatic billing of the Obligation.

OBLIGATIONS		PAYMENTS						
ADD OBLIGATION		ADD PAYMENT						
<input type="checkbox"/>	ID	Open Date ↓	Obligation Type	Charges	Billed	Payments	Total Amount Due	Current Amount Due
<input type="checkbox"/>	100000	01/17/2019	Program Fee	\$1,800.00	\$25.00	\$0.00	\$1,800.00	\$25.00

Payment Plan			SUSPEND PAYMENT PLAN	
Bill \$25.00 a week starting 01/17/2019				
Bill	Bill Date	Amount		
1	01/17/2019	\$25.00		
			Items per page: 10 1 - 1 of 1	
		Total Billed	\$25.00	
		Total Payments	\$0.00	
		Current Amount Due	\$25.00	

Payment Plan		
SUSPENDED Bill \$25.00 a week starting 01/17/2019		
Bill	Bill Date	
1	01/17/2019	

ACCOUNTING - REINSTATE PAYMENT PLAN

Once an Obligation has been created, the User can click on the Obligation ID in order to Reinstall the Payment Plan. Users can click on the *Reinstall Payment Plan* button. Reinstalling the Payment Plan will resume the automatic billing of the obligation.

OBLIGATIONS		PAYMENTS						
ADD OBLIGATION		ADD PAYMENT						
<input type="checkbox"/>	ID	Open Date ↓	Obligation Type	Charges	Billed	Payments	Total Amount Due	Current Amount Due
<input type="checkbox"/>	100000	01/17/2019	Program Fee	\$1,800.00	\$25.00	\$0.00	\$1,800.00	\$25.00

Payment Plan

SUSPENDED

Bill \$25.00 a week starting 01/17/2019

REINSTATE PAYMENT PLAN

Bill	Bill Date	Amount
1	01/17/2019	\$25.00

Items per page: 10

1 - 1 of 1

<

>

Total Billed	\$25.00
+ Total Payments	\$0.00
Current Amount Due	\$25.00


TOPIC 21: COMMUNITY SERVICE

Subtopics:

1. Overview
2. Worksite Assignments
3. Worksite List Report
4. Log Entries

COMMUNITY SERVICE - OVERVIEW

Users have the ability to record Community Service Worksite assignments and log Community Service hours completed. When clicking on the *Community Service* link, users are presented with the Client's Community Service progress.



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Client Info
 Criminal History
 Involvement History
 Involvement DUI-20190102-1
 Activities
 Surveys, Assessments & Goals
 Supervision
 Treatment/Education Attendance
 Accounting
Community Service

Progress

40.0
Hours Ordered

5.0
Hours Completed

35.0
Hours Remaining



Worksite Assignments
 No worksite assignments.

Community Service Log
 No community service entries.

COMMUNITY SERVICE - WORKSITE ASSIGNMENTS

Users have the ability to assign specific Community Service Worksites where the Client can complete their Community Service requirement. Available worksites are entered into the System Admin setting. Users can click on the pen icon to assign Worksites. Users can select a number of filters to find appropriate worksite(s) for the client.

Worksite Assignments

No worksite assignments.



Search Filters

Organization Name

Organization Name

Location

Scottsdale, AZ 85250, USA

Distance From Location

☒ Any
☐ 5mi
☐ 10mi
☐ 25mi
☐ 50mi

Day Of Week

☐ Sunday
☐ Monday
☐ Tuesday
☐ Wednesday
☐ Thursday
☐ Friday
☐ Saturday

Registration Types

☐ Appointment
☐ Walk In


Volunteer Types

☐ Adult
☐ Juvenile

Restrictions

Restrictions

Search Results (3)



AutoMon LLC (480) 368-8555 ext. 104

6621 North Scottsdale Road, Scottsdale, AZ 85250 - 1.60 Miles

Monday: 08:15AM - 03:45PM, Tuesday: 08:15AM - 03:45PM


Hello

Registration Types: Appointment, Walkin

Volunteer Types: Adult, Juvenile

Restrictions: Violence, Sexual, Felon

ADD




City of Phoenix Human Services

200 West Washington Street, Phoenix, AZ 85003 - 11.55 Miles

Registration Types: Appointment, Walkin

Volunteer Types: Adult, Juvenile

ADD



Pima County Community Service Department

2798 East Ajo Way, Tucson, AZ 85713 - 108.49 Miles

Registration Types: Appointment, Walkin

Volunteer Types: Adult, Juvenile


ADD

VIEW SELECTED SITES

ASSIGN(0)


COMMUNITY SERVICE - WORKSITE LIST REPORT

Users also have the ability to generate and print a Worksite Assignment report and provide it to the Client. The report contains details of the Worksites that will allow the Client to call and/or visit to schedule their Community Service hours.

Progress			
40.0 Hours Ordered	5.0 Hours Completed	35.0 Hours Remaining	
Worksite Assignments			
NAME	DESCRIPTION	ADDRESS	PHONE
AutoMon LLC	Hello	6621 North Scottsdale Road, Scottsdale, AZ 85250	(480) 368-8555 ext. 104
City of Phoenix Human Services		200 West Washington Street, Phoenix, AZ 85003	
Community Service Log			
ENTRY DATE	REASON	WORKSITE	HOURS
Jan 17, 2019	Initial Order		40
Jan 17, 2019	Attendance	AutoMon LLC - 6621 North Scottsdale Road, Scottsdale, AZ 85250	-2
Jan 17, 2019	Attendance		-3

AutoMon LLC

Organization: AutoMon LLC



Business Hours: Monday 08:15AM - 03:45PM, Tuesday 08:15AM - 03:45PM

Worksite List Report

Website: www.automon.com

Address: 6621 North Scottsdale Road, Scottsdale, AZ 85250

Phone: (480) 368-8555 ext. 104 **Fax:** (480) 368-8555

Description:
Hello

Contact Name: Eileen Marin

Contact Phone: (480) 368-8555 ext. 121 **Contact Email:** emarin@automon.com

COMMUNITY SERVICE - LOG ENTRIES

To log Community Service hours, Users click on the pen icon in the Community Service Log section. Users will first log the number of Community Service hours that have been ordered. Users would use the same section to log when Community Service hours have been completed or changed (either increased or decreased). Users can click on the + icon on the right to add multiple log entries at the same time.

Community Service Log

No community service entries.



Log Entries

DATE	REASON	WORKSITE	REFERENCE #	HOURS	
1/17/2019	Reason * Initial Order	Worksite	Reference #	Hours Ordered *	40
1/17/2019	Reason * Attendance	Worksite * AutoMon LLC - 6621 North Scottsdale Road, Scottsdale, AZ 85250	Reference #	Hours Completed *	2
1/17/2019	Reason * Attendance	Worksite * None	Reference #	Hours Completed *	3

CANCEL

LOG

Subtopics:

1. Overview
2. Filtering & Viewing Associated Linked Items
3. Creating Notes
4. Editing and Deleting Notes

The Notes section can be found by clicking on the *Notes* link. This feature can be powerful in that Users can filter and view all comments, status changes, attendances, and events in one location. Users can add new notes from this section and can associate that note with a specific item. Users can only edit and/or delete notes that they have created.

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Client Info

Criminal History

Involvement History

Involvement DUI-20190102-1

Activities

Surveys, Assessments & Goals

Supervision

Treatment/Education Attendance

Accounting

Community Service

Notes

Documents & Forms

Tasks

Eileen Marin 01/16/2019 12:28AM:

Referral Submitted

Status Change 01/02/2019: Referred

Eileen Marin 01/16/2019 12:29AM:

Referral Approved

Status Change 01/03/2019: Approved

Eileen Marin 01/17/2019 7:51AM:

Client did not call or show up to session.

Attendance 01/17/2019: Generic Recovery Program

Eileen Marin 01/17/2019 8:00AM:

This is the 2nd time the Client has missed a scheduled session.

Attendance 01/17/2019: Generic Recovery Program

Jordan Butler 01/17/2019 9:48AM:

This client came and provided his paystub check today.

Filters

Note Author

☐ Eileen Marin
 ☐ Jordan Butler

Associated Item Type


☐ Attendance
 ☐ Contact
 ☐ Drug Test
 ☐ Hearing
 ☐ Obligation
 ☐ Payment
 ☐ Reward
 ☐ Sanction
 ☐ Status Change

Date Range

-

NOTES - FILTERING & VIEWING ASSOCIATED ITEMS

Users can filter notes by Author, associated item type, or by date range. Users can also see the associated item (drug test, contact, etc.) that is linked by clicking on the *Item Type* hyperlink in the note.



Client Info

Criminal History

Involvement History

Involvement DUI-20190102-1

Activities

Surveys, Assessments & Goals

Supervision

Treatment/Education Attendance

Accounting

Community Service

Notes

Documents & Forms

Tasks

Eileen Marin 01/16/2019 12:28AM:

Referral Submitted

Status Change 01/02/2019: Referred

Eileen Marin 01/16/2019 12:29AM:

Referral Approved

Status Change 01/03/2019: Approved

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Eileen Marin 01/17/2019 8:00AM:

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Attendance 01/17/2019: Generic Recovery Program

Jordan Butler 01/17/2019 9:48AM:

This client came and provided his paystub check today.

Filters

Note Author

☐ Eileen Marin

☐ Jordan Butler

Associated Item Type

☐ Attendance

☐ Contact

☐ Drug Test

☐ Hearing

☐ Obligation

☐ Payment

☐ Reward

☐ Sanction

☐ Status Change

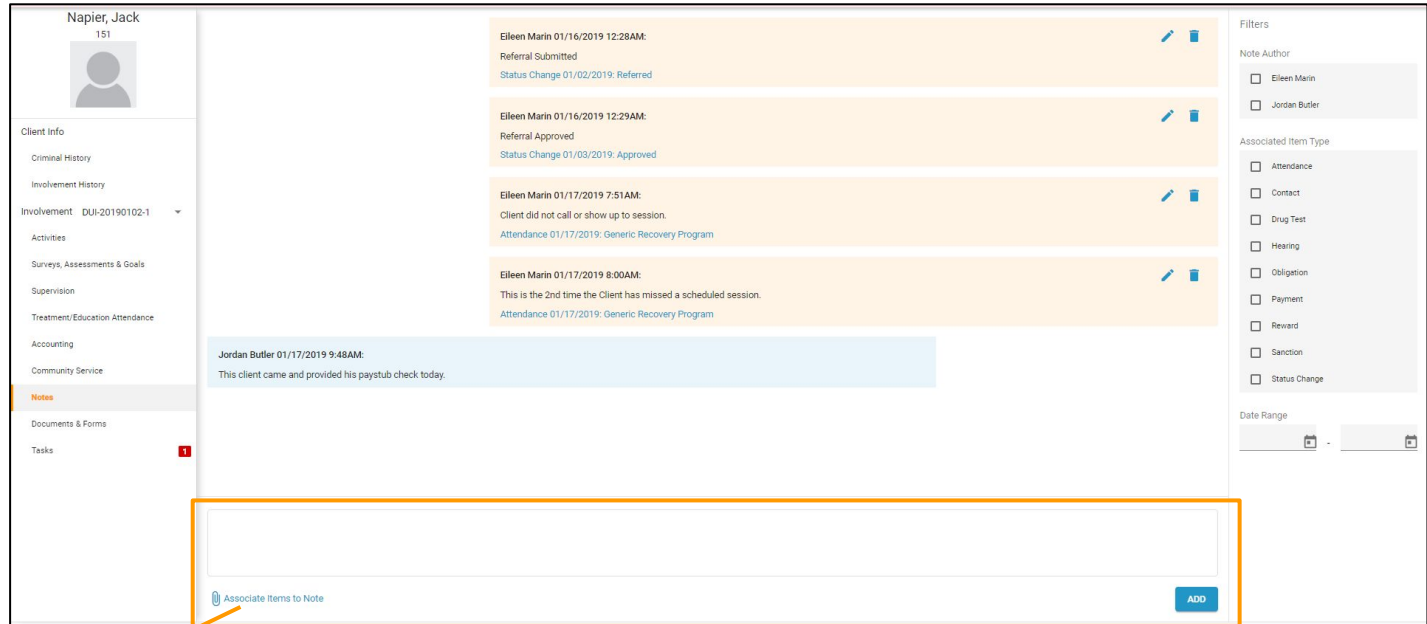
Date Range

-

TREATMENT SESSION REQUIREMENTS	PROGRAM ENROLLMENT	TREATMENT ATTENDANCE			
LOG ATTENDANCE					
Date ↓	Session Type	Program	Status	Session Length	Notes
1/17/2019 - 1/17/2019		Generic Recovery Program			
01/17/2019	Counseling	Generic Recovery Program	Completed	4 hours	
01/17/2019	Counseling	Generic Recovery Program	Completed	3 hours	
01/17/2019	Cognitive Behavioral Therapy	Generic Recovery Program	Missed	2 hours	(2)

NOTES - CREATING NOTES

Users can create new Notes and, if applicable, associate the note to an item (drug test, contact, etc.). Users can type their note in the narrative box and then click the *Add* button. To associate the note to an item, click on the paperclip hyperlink.



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Client Info
Criminal History
Involvement History
Involvement: DUI-20190102-1
Activities
Surveys, Assessments & Goals
Supervision
Treatment/Education Attendance
Accounting
Community Service
Notes
Documents & Forms
Tasks

Eileen Marin 01/16/2019 12:28AM:
Referral Submitted
Status Change 01/02/2019: Referred

Eileen Marin 01/16/2019 12:29AM:
Referral Approved
Status Change 01/03/2019: Approved

Eileen Marin 01/17/2019 7:51AM:
Client did not call or show up to session.
Attendance 01/17/2019: Generic Recovery Program

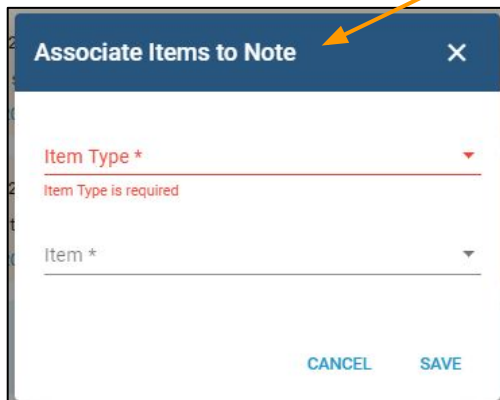
Eileen Marin 01/17/2019 8:00AM:
This is the 2nd time the Client has missed a scheduled session.
Attendance 01/17/2019: Generic Recovery Program

Jordan Butler 01/17/2019 9:48AM:
This client came and provided his paystub check today.

Associate Items to Note

ADD

Filters
Note Author
☐ Eileen Marin
☐ Jordan Butler
Associated Item Type
☐ Attendance
☐ Contact
☐ Drug Test
☐ Hearing
☐ Obligation
☐ Payment
☐ Reward
☐ Sanction
☐ Status Change
Date Range
- -



Associate Items to Note X

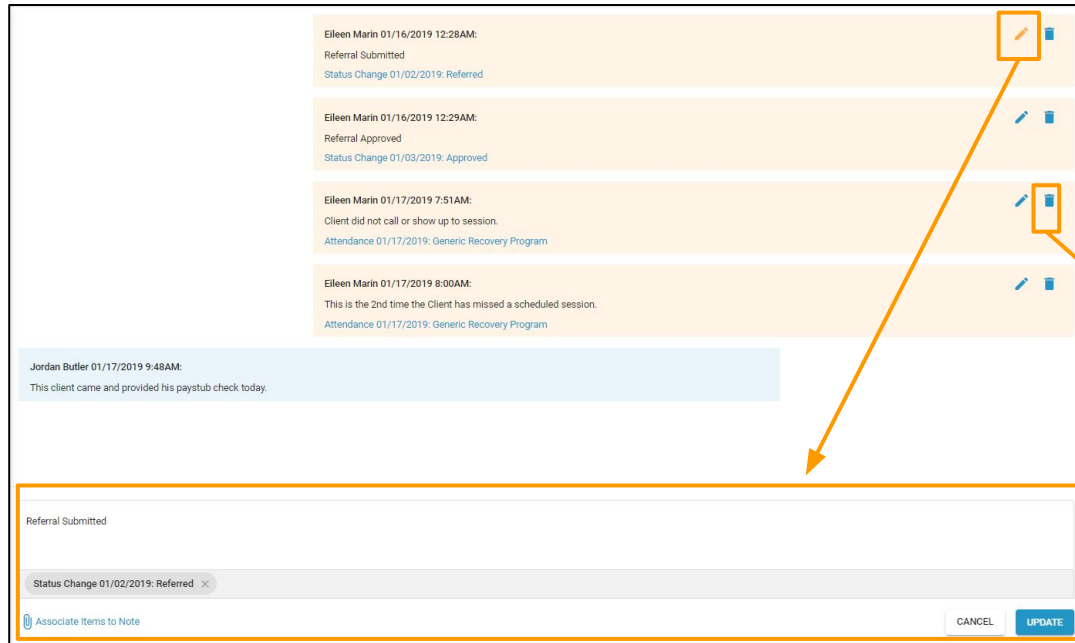
Item Type *
Item Type is required

Item *

CANCEL SAVE

NOTES - EDITING AND DELETING NOTES

Users can only Edit or Delete their own notes. To edit Notes, click on the pen icon. To delete notes, click on the trash can icon.



Eileen Marin 01/16/2019 12:28AM:
Referral Submitted
Status Change 01/02/2019: Referred

Eileen Marin 01/16/2019 12:29AM:
Referral Approved
Status Change 01/03/2019: Approved

Eileen Marin 01/17/2019 7:51AM:
Client did not call or show up to session.
Attendance 01/17/2019: Generic Recovery Program

Eileen Marin 01/17/2019 8:00AM:
This is the 2nd time the Client has missed a scheduled session.
Attendance 01/17/2019: Generic Recovery Program

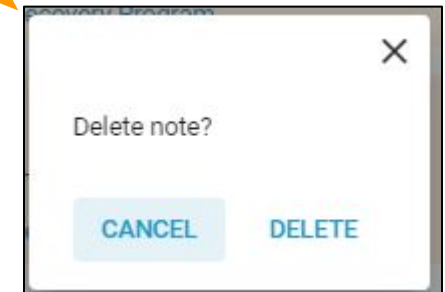
Jordan Butler 01/17/2019 9:48AM:
This client came and provided his paystub check today.

Referral Submitted

Status Change 01/02/2019: Referred

Associate Items to Note

CANCEL UPDATE



Delete note?

CANCEL DELETE

TOPIC 23: DOCUMENTS & FORMS

Subtopics:


1. Overview
2. Installing Word Add-in
3. Managing Templates
4. Adding Documents
5. Generating Forms
6. Downloading & Deleting

DOCUMENTS & FORMS - OVERVIEW

Users have the ability to upload documents and/or create and generate Microsoft Word templates. Templates are created to allow the system to populate data through the use of Word tags. In this section will review uploading documents, installing the Word Add-In and creating templates.

Napier, Jack

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Client Info

Criminal History

Involvement History

Involvement DC-20181008-1

Activities

Assessments & Goals

Supervision

Treatment/Education Attendance



Accounting

Community Service

Notes

Documents & Forms

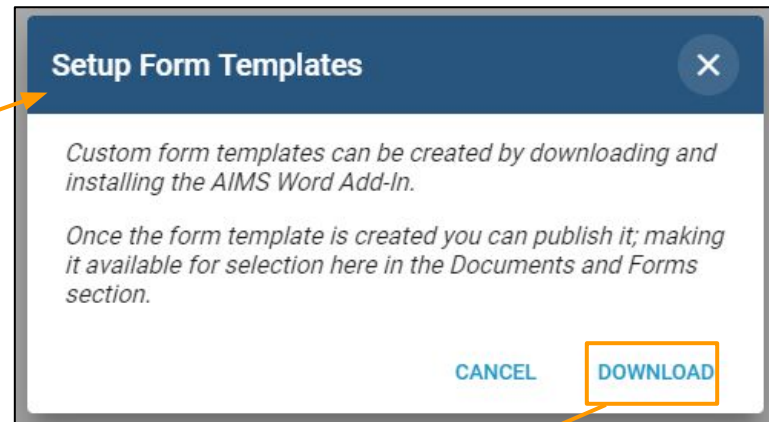
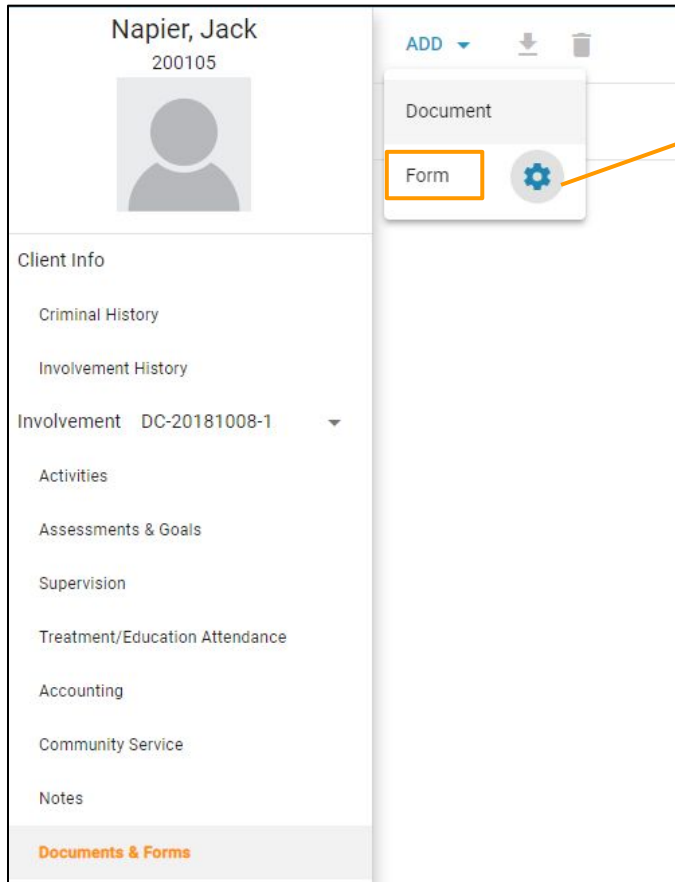
ADD

<input type="checkbox"/> File Name	File Type	File Size	Added Date ↓	Added By
No documents found				

DOCUMENTS & FORMS - WORD ADD-IN

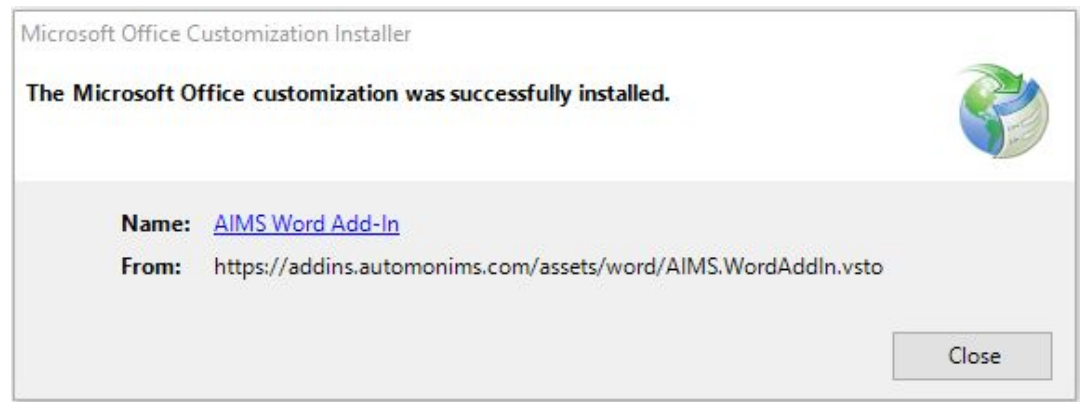
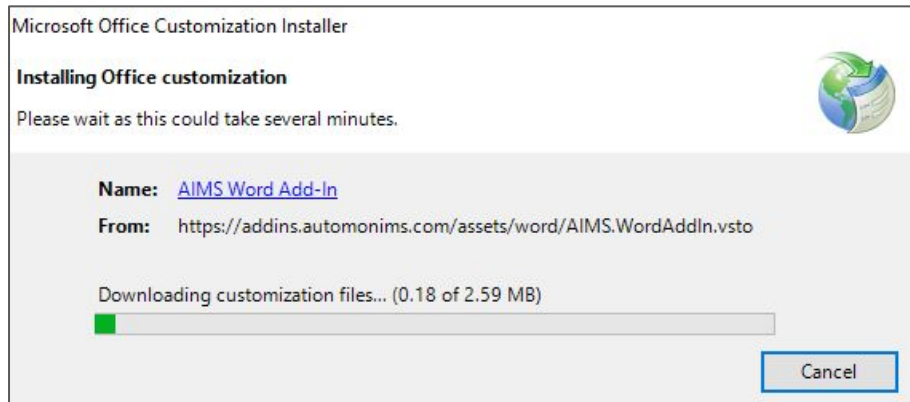
In order to create Word Templates, Users will first need to install the Word Add-In. Click on the *Add* button and then click the gear icon. Users would then click on the *Download* link. Users will see the setup.exe download on their browser.



**** Users will need to have a role of Template Designer in order to create Word Templates.***

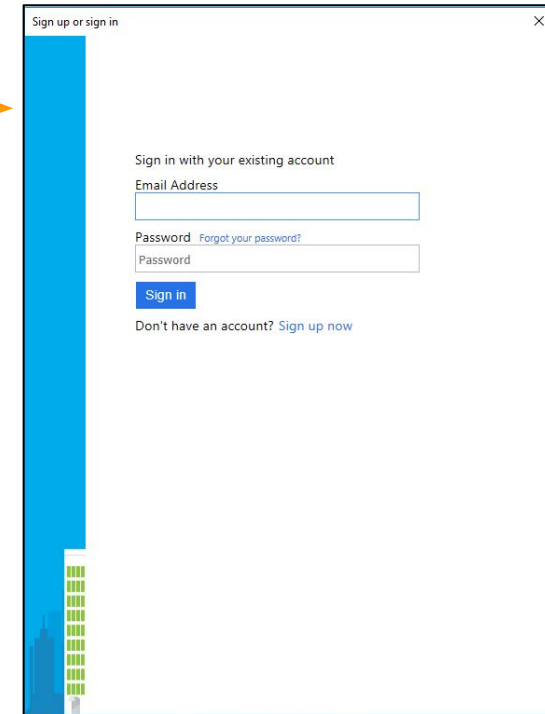
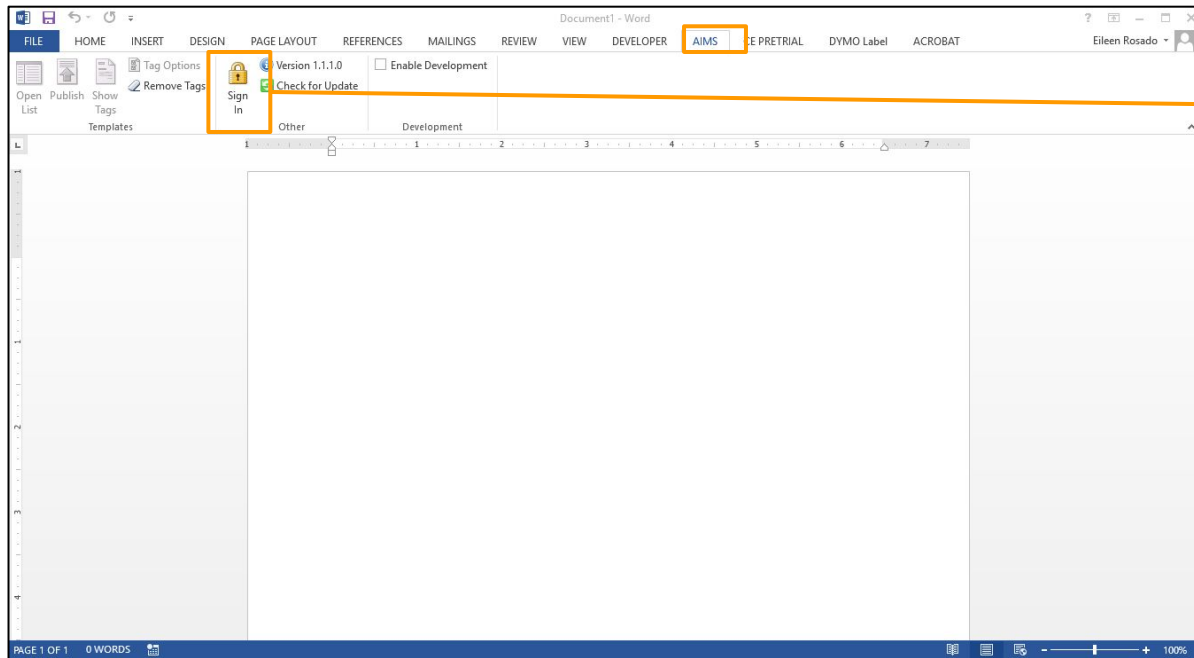
DOCUMENTS & FORMS - WORD ADD-IN

Click on the setup.exe to run the Word Add-In installation. The installer will indicate once it has been finished.



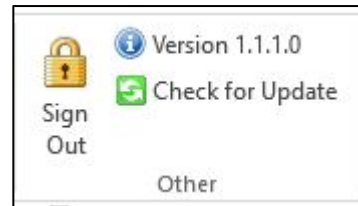
DOCUMENTS & FORMS - MANAGING TEMPLATES

To create a Word Template, Users with appropriate permissions first need to launch Microsoft Word, click on the AIMS Word Add-In and sign in. Use your same AIMS login/password to log into the Word Add-In.



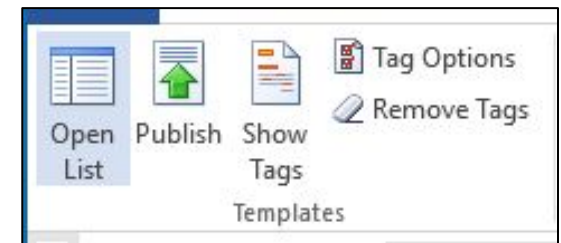
DOCUMENTS & FORMS - MANAGING TEMPLATES

Once signed in, Users will see the version of the Add-In, ability to check for a newer version of the AIMS Add-In or sign out.



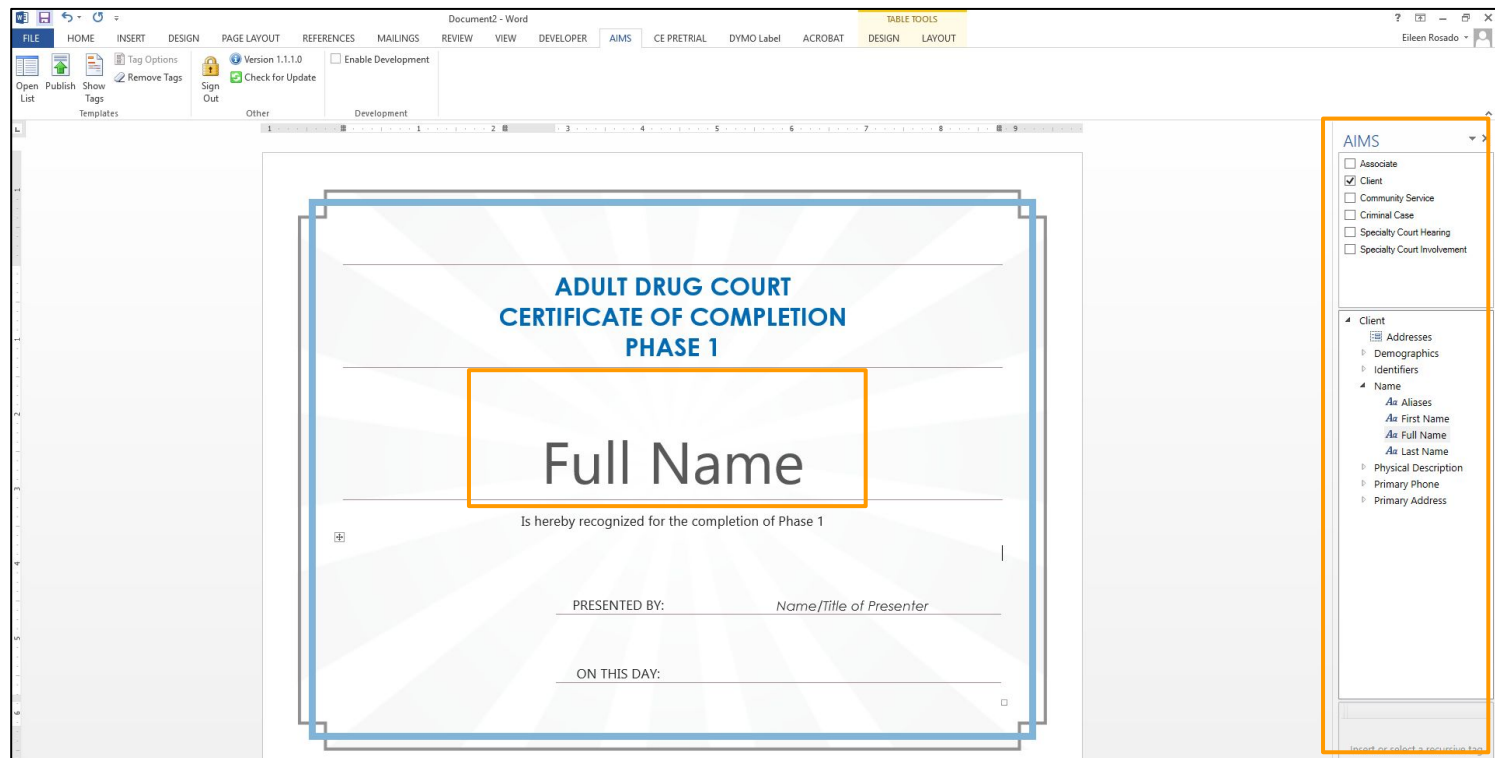
To the left of the Sign out option, Users can perform the following actions:

- **Open List** - This will open a list of all existing templates;
- **Publish** - This is the button Users will click when they want to publish a new template or save changes on an existing template;
- **Show Tags** - Clicking this button will open the list of word tags available. These tags will populate data from AIMS when generating the template;
- **Remove Tags** - Clicking this button will remove all tags in the template;
- **Tag Options** - This option will display the data from that tag in a specific format. For example, showing DOB as January 17th, 1981 or as 1/17/81.



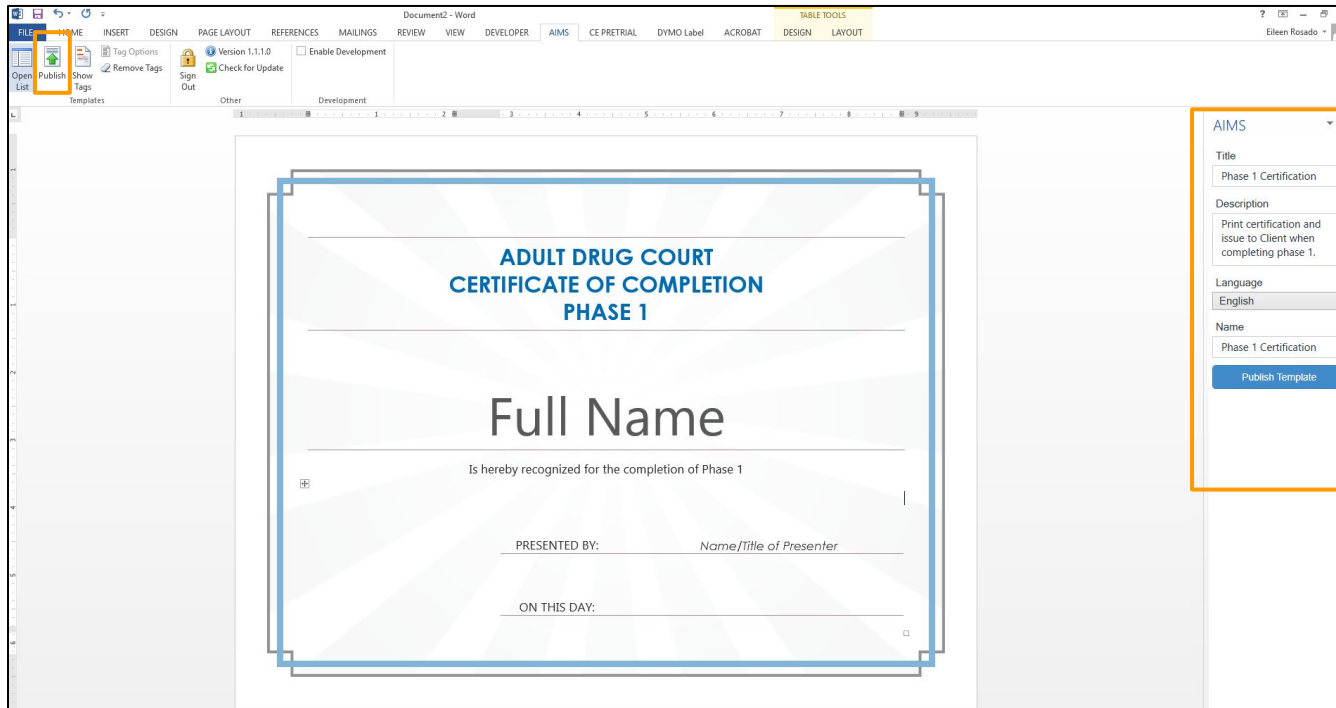
DOCUMENTS & FORMS - MANAGING TEMPLATES

To begin creating a new template, click on the *Show Tags* option. The right panel will display the available tags. Best practice is to write up the template first, then add the required Word tags. Keep in mind how the template should be formatted – logos, headers, etc. You can make use of standard MS Word capabilities, as normal. The tags simply populate data that exist in AIMS into the template. Once the template has been created, click on the Tag Categories and expand the tags to locate the desired tags to be added. Place your cursor in the document of where you want to add the tag, then, double-click on the tag to add it.



DOCUMENTS & FORMS - MANAGING TEMPLATES

Once all desired tags have been added into the document template, click on the *Publish* icon. You will then be required to enter a template title, description, language (*note this will not translate the template but allows you file all templates under the appropriate language), and Template name. Click on the *Publish Template* button. Once you receive confirmation your template has published, it is now available for all Users with permissions to generate on any Client.



Document2 - Word

FILE HOME INSERT DESIGN PAGE LAYOUT REFERENCES MAILINGS REVIEW VIEW DEVELOPER AIMS CE PRETRIAL DYMO Label ACROBAT TABLE TOOLS DESIGN LAYOUT

Open List Publish Show Tags Remove Tags Sign Out Check for Update Enable Development

ADULT DRUG COURT
CERTIFICATE OF COMPLETION
PHASE 1

Full Name

Is hereby recognized for the completion of Phase 1

PRESENTED BY: Name/Title of Presenter

ON THIS DAY:

AIMS

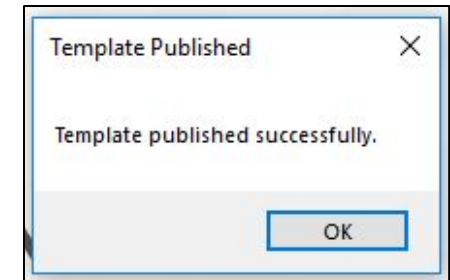
Title
Phase 1 Certification

Description
Print certification and issue to Client when completing phase 1.

Language
English

Name
Phase 1 Certification

Publish Template



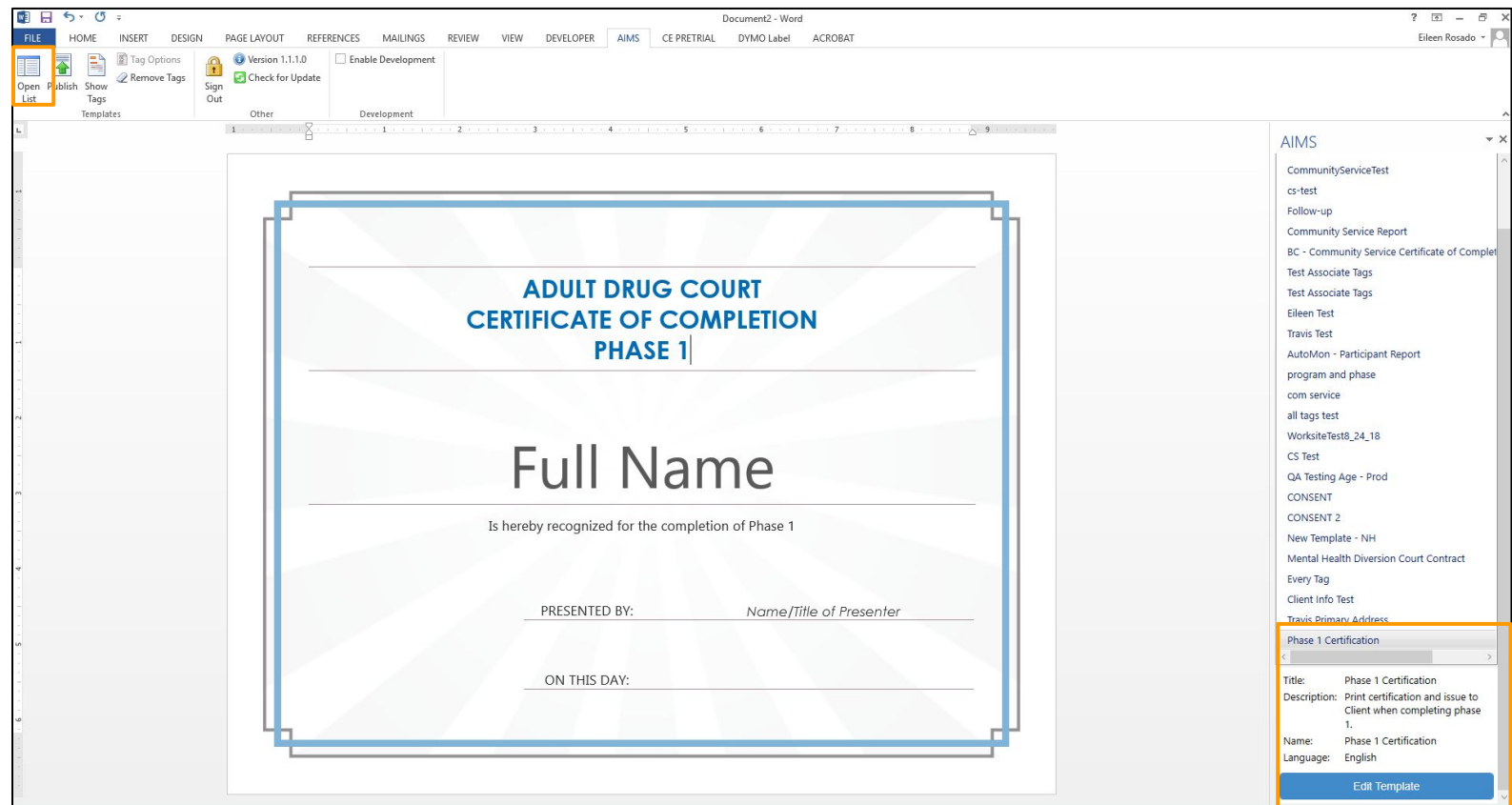
Template Published

Template published successfully.

OK

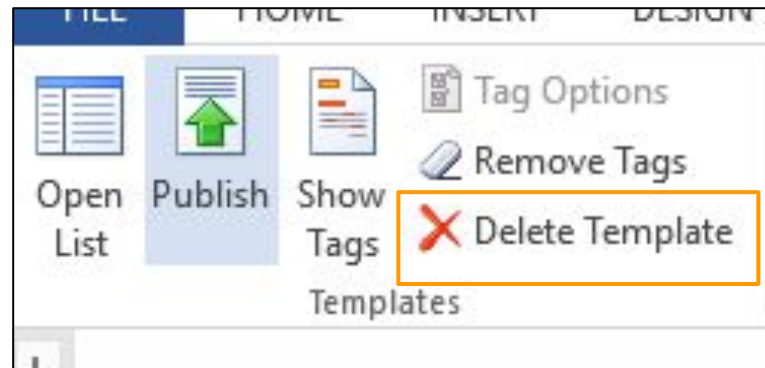
DOCUMENTS & FORMS - MANAGING TEMPLATES

To edit a published template, click on the *Open List* option, click the template name, and then select *Edit Template*. This will open another instance of Word. You will have to log into the Add-In again (AutoMon will be addressing this in a future release). You can then make your necessary changes and click on the *Publish* icon again to save the changes.



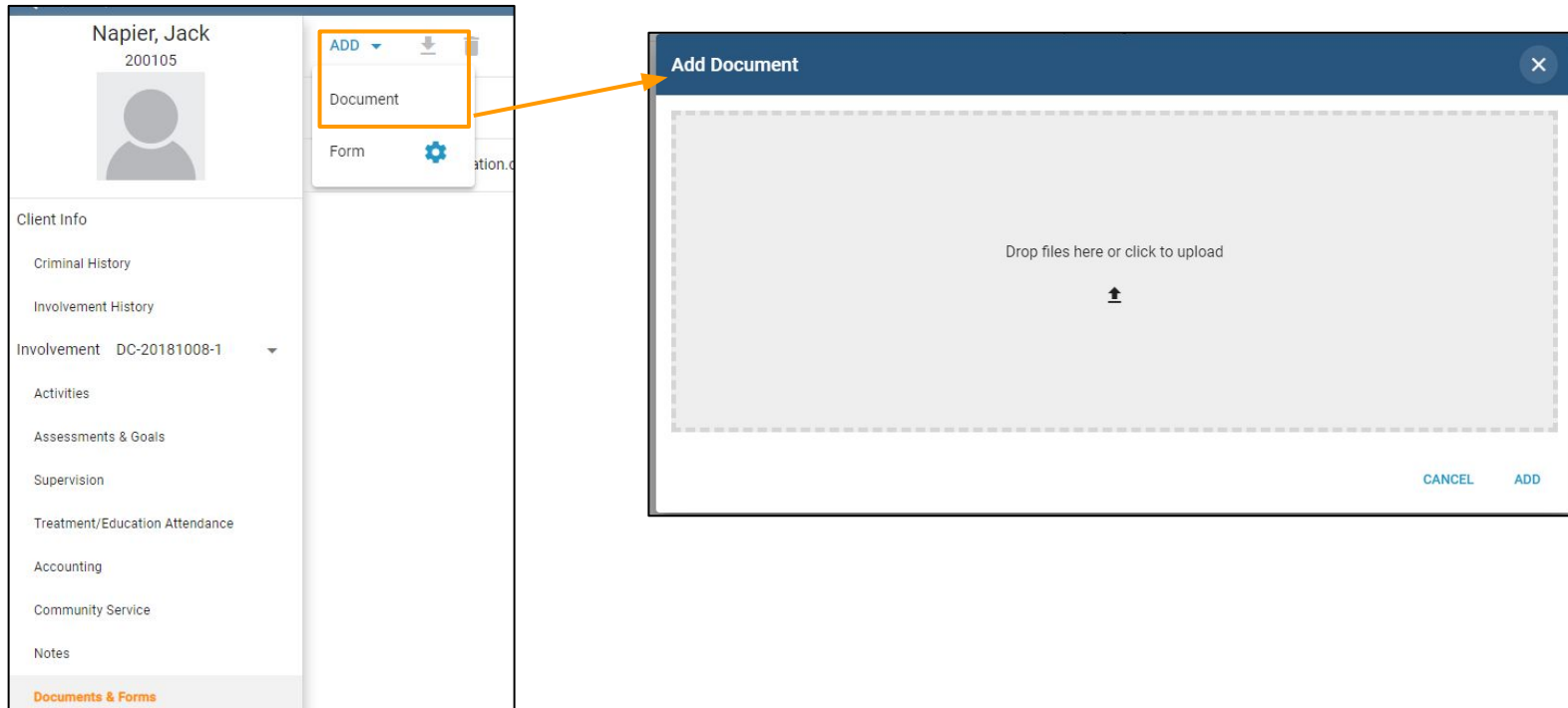
DOCUMENTS & FORMS - MANAGING TEMPLATES

To delete a published template, click on the *Open List* option, click on the template name, and then select *Edit Template*. This will open another instance of Word. You will have to log into the Add-In again (AutoMon will be addressing this in a future release). You will then click on the *Delete Template* icon. This will remove this template and users will not see the template as an option to generate going forward. Note that deleting templates will not delete any saved documents from the template that had previously been created.



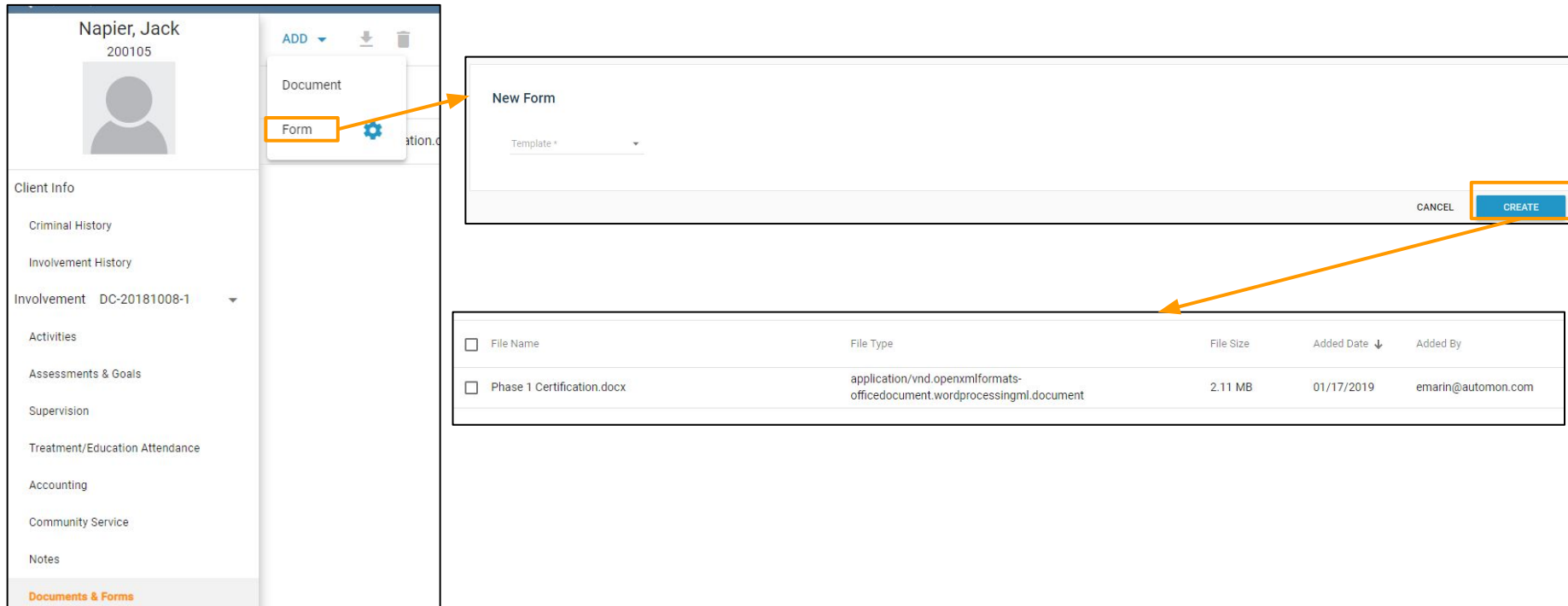
DOCUMENTS & FORMS - ADDING DOCUMENTS

To upload a document to Client's profile (this can be a .PDF or another Word document that was not generated as a template), click on the *Add* option and select *Document*. You then have the ability to drop files or click to upload from your computer.



DOCUMENTS & FORMS - GENERATING FORMS

To generate a Form, click on the *Add* button, then select *Form*. Select the template from the template list and click on the *Create* button. The form will generate the Word template. Users can add additional text, if applicable, to the form. The additional text would be specific to the Client and not a global template change. The Client's document listing would be updated to show all forms generated.



Client Info

Napier, Jack
200105

Client Info

- Criminal History
- Involvement History
- Involvement DC-20181008-1
- Activities
- Assessments & Goals
- Supervision
- Treatment/Education Attendance
- Accounting
- Community Service
- Notes

Documents & Forms

ADD (dropdown menu)

- Document
- Form** (selected)

New Form



Template *

CANCEL CREATE



<input type="checkbox"/> File Name	File Type	File Size	Added Date ↓	Added By
<input type="checkbox"/> Phase 1 Certification.docx	application/vnd.openxmlformats-officedocument.wordprocessingml.document	2.11 MB	01/17/2019	emarin@automon.com

DOCUMENTS & FORMS - DOWNLOADING & DELETING

To download a form that has been generated, Users can click on the checkbox of the form and then click on the *Download* icon.

ADD ▾  				
<input checked="" type="checkbox"/> File Name	File Type	File Size	Added Date ▾	Added By
<input checked="" type="checkbox"/> Phase 1 Certification.docx	application/vnd.openxmlformats-officedocument.wordprocessingml.document	2.11 MB	01/17/2019	emarin@automon.com

To delete a form that has been generated, Users can click on the checkbox of the form and then click on the *Trash* can icon.

ADD ▾  				
<input checked="" type="checkbox"/> File Name	File Type	File Size	Added Date ▾	Added By
<input checked="" type="checkbox"/> Phase 1 Certification.docx	application/vnd.openxmlformats-officedocument.wordprocessingml.document	2.11 MB	01/17/2019	emarin@automon.com


Subtopics:

1. Overview
2. Completing Tasks

TASKS - OVERVIEW

The **Tasks** tab allows a User to view all upcoming tasks the Client must complete.

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Client Info

Criminal History

Involvement History

Involvement DUI-20190102-1

Activities

Surveys, Assessments & Goals

Supervision

Treatment/Education Attendance

Accounting

Community Service

Notes

Documents & Forms

Tasks 1

Task	Due Date
Drug Test	Feb 5, 2019

TASKS - COMPLETING A TASK

A User can complete a Task by clicking on the blue hyperlinked type name in order to complete that task.

Task	Due Date
Drug Test	Feb 5, 2019



DRUG TESTING

[SCHEDULE DRUG TESTS](#)
[LOG NEW DRUG TEST](#)

Show future drug tests scheduled through Next 30 Days

Test Date ↓	Status	Outcome	Schedule Type	Scheduled By
02/05/2019	Scheduled	None	By Group	System Settings ^

Napier, Jack
 DUI-20190102-1

Schedule Type
 By Group: Blue Group

Scheduled By
[System Settings](#)

Collection Date
 Feb 5, 2019

Outcome ▼

Testing Device ▼

Notes

☐ Sent for lab verification

Specimen ID

CLOSE

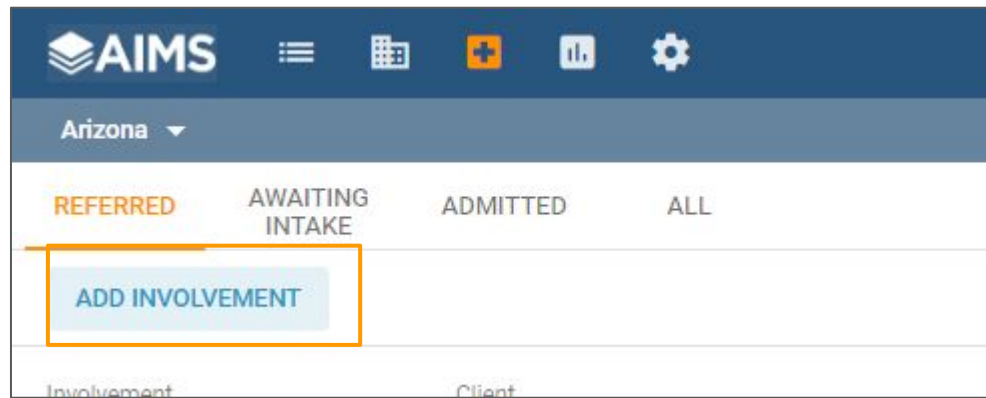
TOPIC 25: REFERRALS & INTAKES

Subtopics:

1. Creating a New Referral
2. Involvement Referral View
3. Denying Referrals
4. Approving Referrals
5. Completing Intakes

REFERRALS - NEW REFERRAL

Users have the ability to add a New Referral from the Speciality Courts menu option. On the Referred tab, Users would click on the *Add Involvement* link.



REFERRALS - NEW REFERRAL

Users will first check if the client already exists in the system by typing the Client's name. If the client is not found, the User can click on the *Add New Client* button to add a new Client.

Add Involvement ×

1 Client

2 Involvement Details

3 Documents

🔍

Search for existing client...

Or

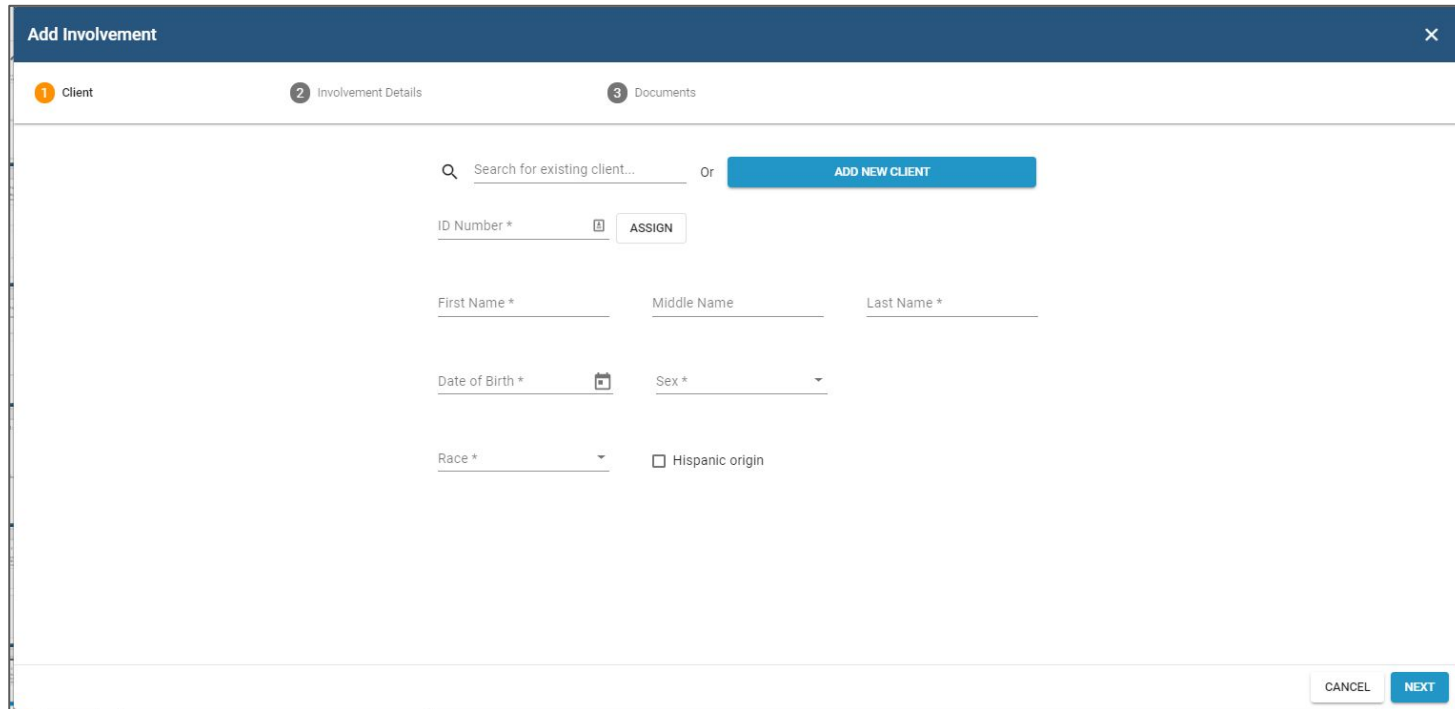
ADD NEW CLIENT

CANCEL

NEXT

REFERRALS - NEW REFERRAL

When adding a new Client, Users will be required to enter an ID number or assign one. This number can be changed after it has been created. It links all Involvement and person data to this Client. Users will also be required to enter the Client's First name, Middle name (optional), Last name, Date of Birth, Gender, and Race. The user can also indicate if the Client has of Hispanic Origin.



Add Involvement [X]

1 Client 2 Involvement Details 3 Documents

Search for existing client... Or **ADD NEW CLIENT**

ID Number * **ASSIGN**

First Name * Middle Name Last Name *

Date of Birth * Sex *

Race * ☐ Hispanic origin

CANCEL **NEXT**

REFERRALS - NEW REFERRAL

Once the Client has been added and/or an existing Client selected, the User will enter the Involvement details: referral date, Court, Referral source, Referrer phone number (optional), arrest date, and indicate whether the Client is currently in custody.

Add Involvement

Client

2 Involvement Details

3 Documents

Referral Date *

Court *

Referral Source *

Referrer Phone Number (optional)

Arrest Date

Client Currently In Custody *

123-456-7890

☐ Yes ☐ No

BACK

CANCEL

NEXT

REFERRALS - NEW REFERRAL

The next step allows the User to upload documents to the Referral. Examples of the documents that can be added at this step might be the arrest document, any documents forwarded with the Referral, etc.. This step is optional. Users will click the *Add* button to add the New Referral.

Add Involvement

Client

Involvement Details

3 Documents

Drop files here or click to upload

BACK

CANCEL

ADD

REFERRALS - INVOLVEMENT REFERRAL VIEW

Once the Referral has been entered, the User has several different ways they can view the details and proceed to the next step. In our examples, we will go through the Client's profile screen to proceed to the next steps. Since the Client's Referral is still in progress, the Involvement overview will only reflect the Referral progress.

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Client Info

Criminal History

Involvement History

Involvement DC-20190109-1

Activities

Surveys, Assessments & Goals

Supervision

Treatment/Education Attendance

Accounting

Community Service

Notes

Documents & Forms

Tasks

Arrest

01/01/2019

✓ Referral

01/09/2019

2 Approval/Denial

3 Intake

APPROVE

DENY

Client Information

DOB

01/17/1981

Age

38

Sex

Male

Race

Unknown

Hispanic Origin

No

Referral Details

Court

Drug Court 1

Days Since Referral

8

Referral Source

Scottsdale Police Department

In Custody

No

Phone Number

None

Assessments

ADD ASSESSMENT

No assessments.

Surveys

ADD SURVEY

No surveys found

Documents

ADD DOCUMENT

No documents.

REFERRALS - INVOLVEMENT REFERRAL VIEW

This view allows the User to have quick access to enter additional Client information, such as address, phone, etc., as well as add the criminal case that is tied to the Referral. The User can also add an assessment, survey, or a document. Once all necessary functions have been performed, the User can click on either the *Approve* or *Deny* buttons.

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Client Info

Criminal History

Involvement History

Involvement DC-20190109-1

Activities

Surveys, Assessments & Goals

Supervision

Treatment/Education Attendance

Accounting

Community Service

Notes

Documents & Forms

Tasks

Arrest

01/01/2019

Referral

01/09/2019

Approval/Denial

Intake

APPROVE

DENY

Client Information

DOB

01/17/1981

Age

38

Sex

Male

Race

Unknown

Hispanic Origin

No

Referral Details

Court

Drug Court 1

Days Since Referral

8

Referral Source

Scottsdale Police Department

In Custody

No

Phone Number

None

Assessments

ADD ASSESSMENT

No assessments.

Surveys

ADD SURVEY

No surveys found

Documents

ADD DOCUMENT

No documents.

REFERRALS - DENYING REFERRALS

When the Referral is being denied, the User will be prompted to enter a reason, indicate the denial date (must be after the referral date), and add additional notes, if necessary.

Deny Referral

Reason *

Denial date *

1/17/2019

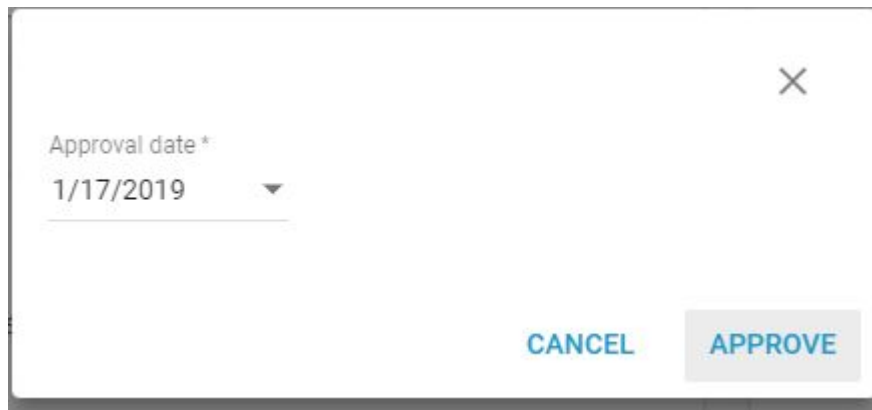
Notes

CANCEL

DENY

REFERRALS - APPROVING REFERRALS

When the referral is being approved, the User is prompted to enter an approval date (must be after the referral date). Once the Client has been approved, the User will complete the intake steps next.

A modal dialog box for approving a referral. It features a close button (X) in the top right corner. The main content area contains a label "Approval date *" followed by a date input field showing "1/17/2019" with a dropdown arrow. At the bottom right, there are two buttons: "CANCEL" and "APPROVE".

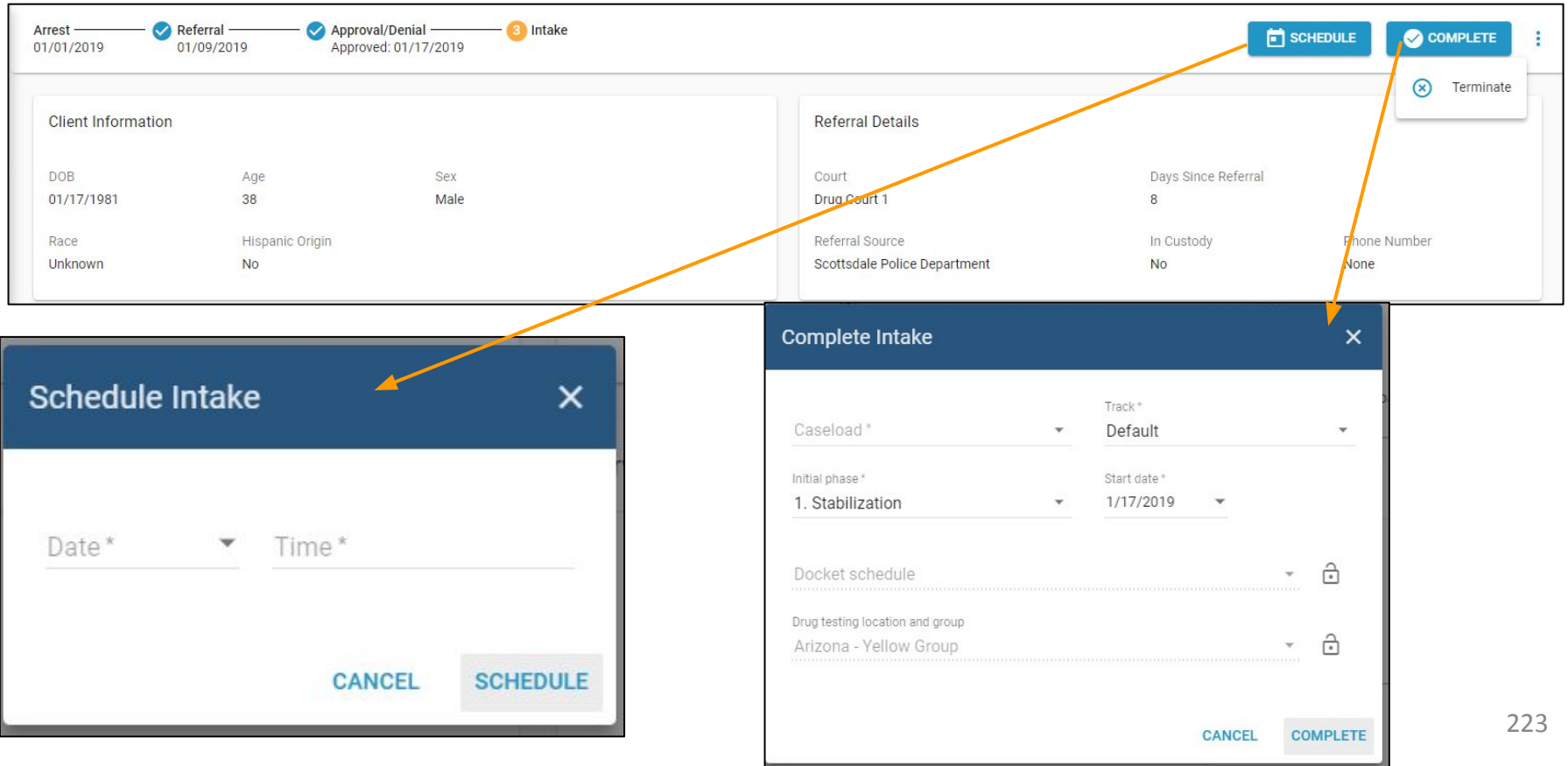
Approval date *

1/17/2019 ▼

CANCEL APPROVE

REFERRALS - COMPLETING INTAKES

Once the referral has been approved, the User will then have several Intake options. The Involvement view will reflect that the Client is in the Intake Phase. The User can either schedule the Intake completion or complete the Intake immediately. When completing the Intake, the User is required to select the Caseload that will be assigned to the Client, the initial Phase, start date, and indicate the Docket and drug testing schedules. The User can also terminate the Involvement at the Intake phase.



The main interface shows a progress bar with four steps: Arrest (01/01/2019), Referral (01/09/2019), Approval/Denial (Approved: 01/17/2019), and Intake (3). The Intake phase is currently active. Below the progress bar, there are two sections: Client Information and Referral Details.

Client Information			Referral Details		
DOB	Age	Sex	Court	Days Since Referral	
01/17/1981	38	Male	Drug Court 1	8	
Race	Hispanic Origin		Referral Source	In Custody	Phone Number
Unknown	No		Scottsdale Police Department	No	None

At the top right, there are two buttons: **SCHEDULE** and **COMPLETE**. A dropdown menu is open next to the **COMPLETE** button, showing a **Terminate** option.

Two modal windows are shown below the main interface:

- Schedule Intake**: This modal has a header with a close button (X). It contains two input fields: **Date *** and **Time ***. At the bottom, there are two buttons: **CANCEL** and **SCHEDULE**.
- Complete Intake**: This modal has a header with a close button (X). It contains several dropdown menus: **Caseload ***, **Track *** (set to Default), **Initial phase *** (set to 1. Stabilization), and **Start date *** (set to 1/17/2019). Below these are two sections: **Docket schedule** and **Drug testing location and group** (set to Arizona - Yellow Group). At the bottom, there are two buttons: **CANCEL** and **COMPLETE**.

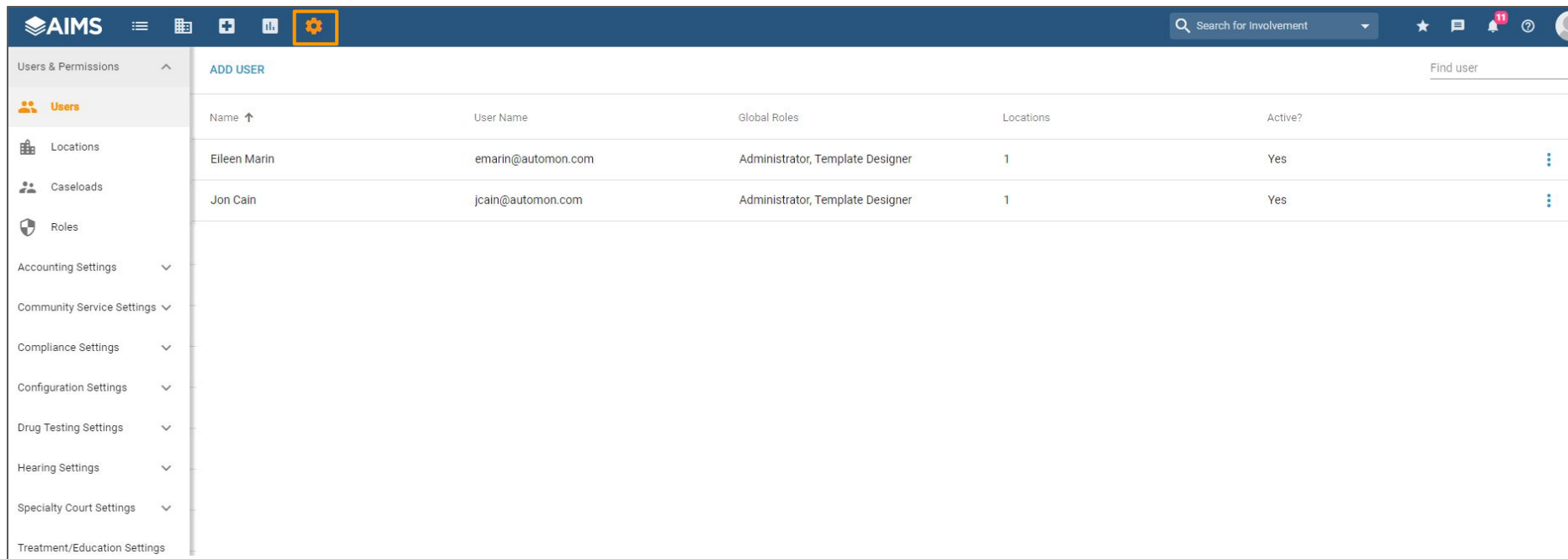
TOPIC 26: ADMINISTRATION

Subtopics:

1. Overview
2. Users & Permissions
3. Locations
4. Caseloads
5. Roles
6. Accounting Settings
7. Community Service Settings
8. Compliance Settings
9. Configuration Settings
10. Drug Testing Settings
11. Hearing Settings
12. Specialty Court Settings
13. Treatment/Education Settings

ADMINISTRATION - OVERVIEW

System Administrators will have the ability to manage settings and configuration from both a global and a location level. Only Users with a role of 'Administrator' can access this location.

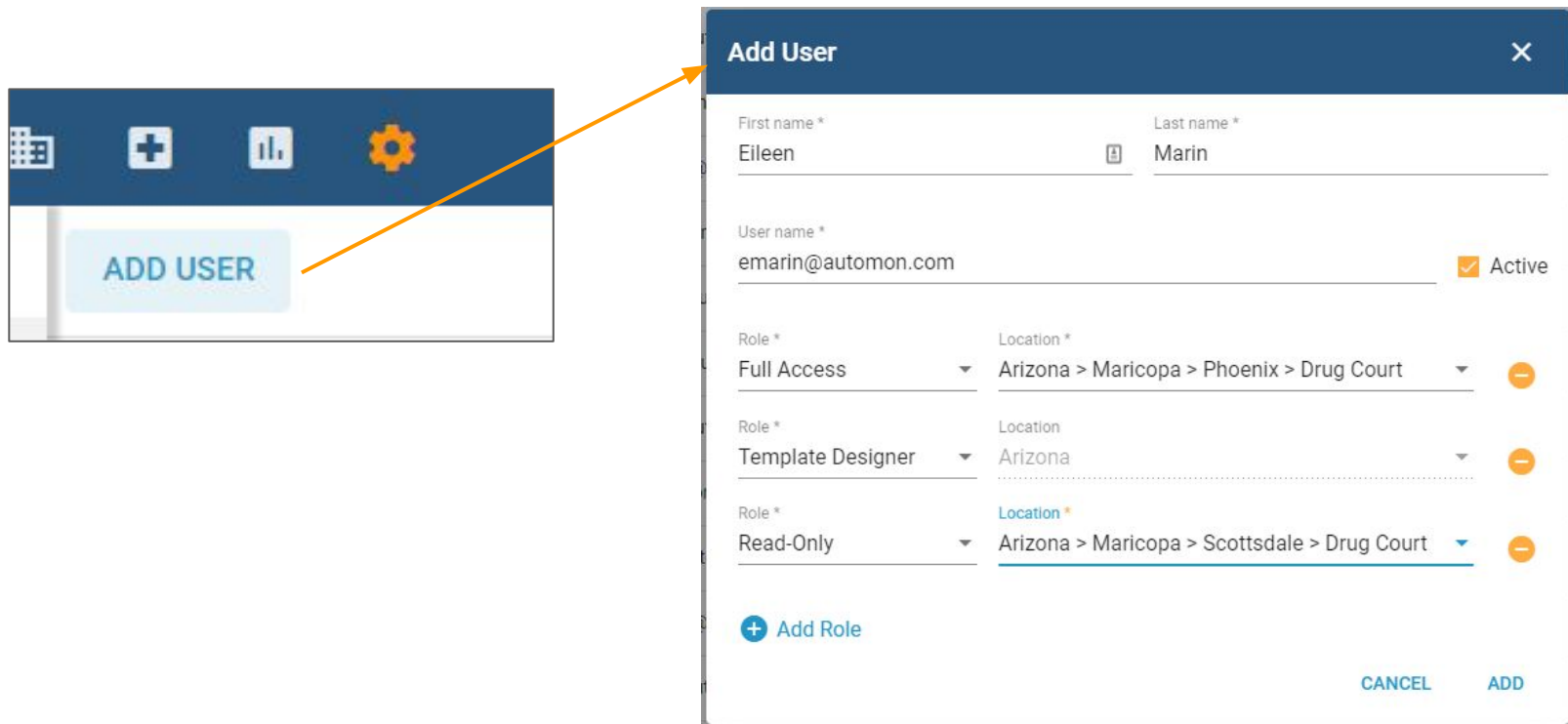


The screenshot shows the AIMS (Automated Information Management System) interface. The top navigation bar includes the AIMS logo, a search bar for involvement, and a settings gear icon highlighted with an orange box. The left sidebar lists various system settings categories, with 'Users & Permissions' expanded to show 'Users', 'Locations', 'Caseloads', and 'Roles'. The main content area displays the 'ADD USER' page, which contains a table of users.

Name ↑	User Name	Global Roles	Locations	Active?
Eileen Marin	emarin@automon.com	Administrator, Template Designer	1	Yes
Jon Cain	jcain@automon.com	Administrator, Template Designer	1	Yes

ADMINISTRATION - USERS & PERMISSIONS

In order for a User to access the system, they first must have their account created in System Admin. Once the User account has been created, the User must proceed to sign up for access by going to the AIMS site. To add a new User, Admins will click on the *Add User* link. Admins will be required to add the User's first and last name, User name (this should be a valid email address), Roles and location. In this step, the Admin can select which location(s) the User can have access to and at what level of permission (role) the User will have at this location(s). Users can have more than one location.



+

+

+

+

ADD USER

×

Add User

First name *

Eileen

Last name *

Marin

User name *

emarin@automon.com

☒ Active

Role *

Full Access

Location *

Arizona > Maricopa > Phoenix > Drug Court

—

Role *

Template Designer

Location

Arizona

—

Role *

Read-Only

Location *

Arizona > Maricopa > Scottsdale > Drug Court

—

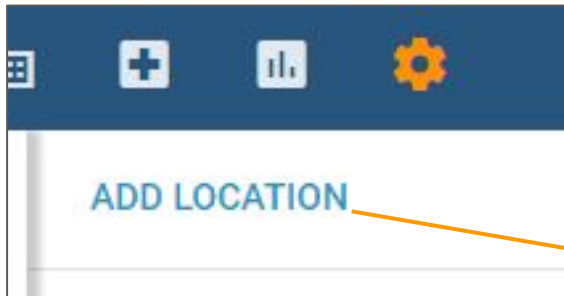
+ Add Role

CANCEL

ADD

ADMINISTRATION - USERS & PERMISSIONS

Locations in AIMS define security locations within the application, therefore, when adding a new location, you'll want to keep in mind the structure of the location to ensure you grant the correct permissions to the Users for the location.



Add Location ×

Parent Location *
Arizona > Maricopa > Phoenix > Drug Court ▼

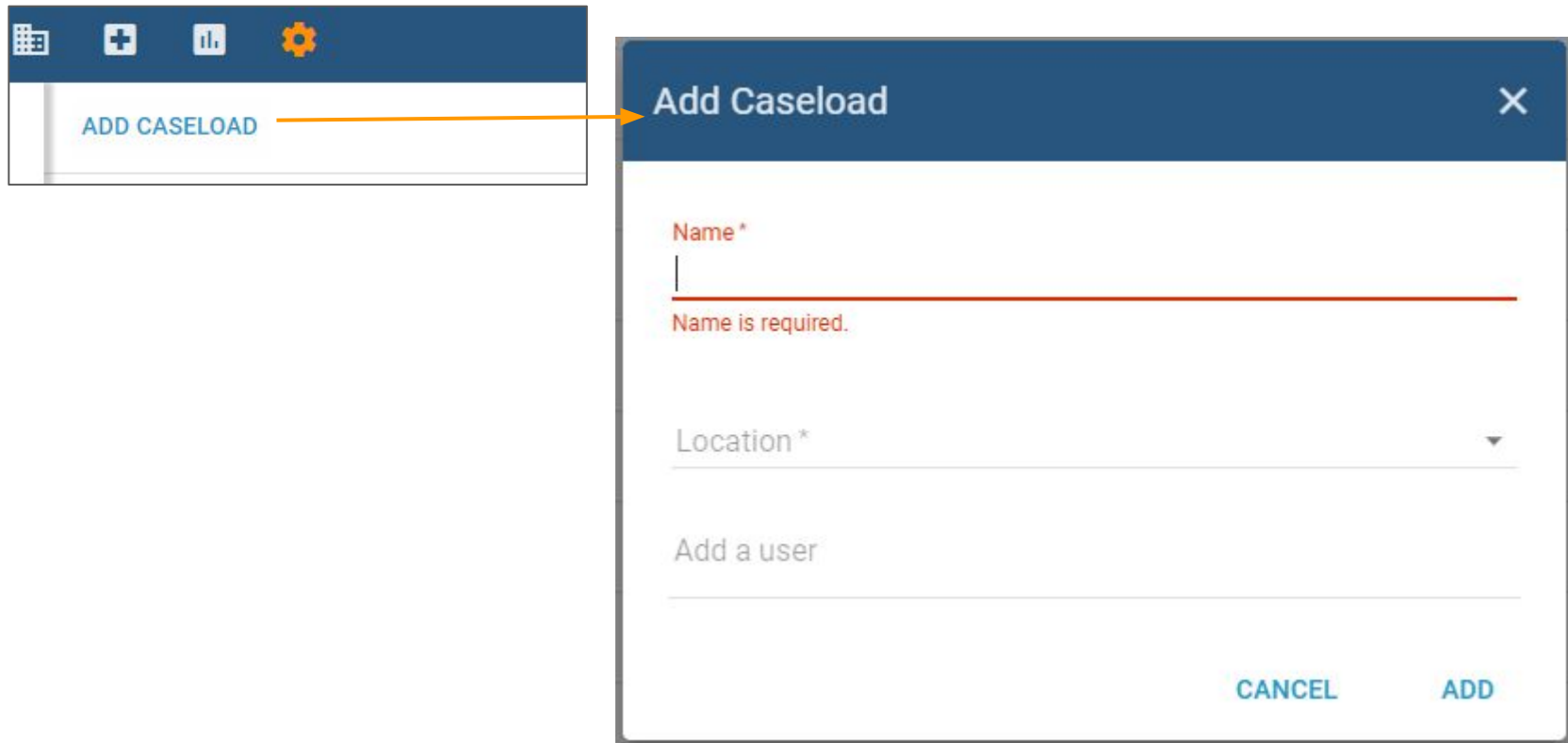
Name *

Name is required

CANCEL ADD

ADMINISTRATION - USERS & PERMISSIONS

Caseloads in AIMS is a grouping of Users at a specific location in which the Client's involvement will be assigned to. Therefore, a case management team would have a Caseload and each User of that team would be assigned to that Caseload.



The screenshot shows the 'Add Caseload' modal form. On the left, a sidebar menu has an 'ADD CASELOAD' button highlighted with an orange arrow pointing to the modal. The modal has a dark blue header with the title 'Add Caseload' and a close button (X). The form contains three input fields: 'Name *' with a red error message 'Name is required.', 'Location *' with a dropdown arrow, and 'Add a user' with a text input field. At the bottom right, there are 'CANCEL' and 'ADD' buttons.

ADD CASELOAD

Add Caseload X

Name *
Name is required.

Location * ▼

Add a user

CANCEL ADD

ADMINISTRATION - USERS & PERMISSIONS

Permissions are defined with the Role function. Admins can create specific roles and within those roles, permissions are specified.

ADD ROLE

✓ ADD

⌂ CANCEL

Name *

Name is required.

Description *

0 / 255

Permissions

Permission

Assessments

Associations

Clinical Info

☐ Edit Clinical Info

Ability to edit a person's clinical information

☐ View Clinical Info

Ability to view a person's clinical information

Community Service

Compliance

Contact Info

☐ Delete Contact Information

Ability to delete the client's address and phone number

☐ Edit Contact Information

Ability to edit the client's residence, address and phone number information

☐ View Contact Information

Ability to view the client's residence, address and phone number information

ADMINISTRATION - ACCOUNTING SETTINGS

Admins can add new Obligation Types by clicking on the *Add Obligation Type* link under the Accounting Settings. Admins can configure Obligation Types to have a default amount and a default Payment Plan.



Add Obligation Type

Name *

Name is required

\$ Default Charge Amount

Default Payment Plan

Default Billing Frequency *

Monthly

\$ Default Billing Amount *

CANCEL

ADD


ADMINISTRATION - COMMUNITY SERVICE SETTINGS


Admins can add Community Service (CS) organizations under the Community Service settings. After creating the CS organization, Admins can add the specific Worksites.



Scottsdale Community Service Organization Organization

ORGANIZATION DETAILS

Name *
 Scottsdale Community Service Organization

Website


WORKSITES

ADDRESS	PHONE	DESCRIPTION	ACTIVE
+			

CANCEL **SAVE CHANGES**

ADMINISTRATION - COMMUNITY SERVICE SETTINGS

When adding Worksites, Admins can enter details regarding the Worksite such as Address & phone, description, volunteer types (adult or juvenile), registration types (appointment or walk ins), restrictions, business hours, and contact information.

Create Worksite for Scottsdale Community Service Organization Organization

ADDRESS & PHONE

Line 1

Line 2

City
State
Postal Code

Phone
Ext.

Fax

WORKSITE DETAILS

Description

Volunteer Types *

Registration Types *

Restrictions

Business Hours

CONTACT INFORMATION

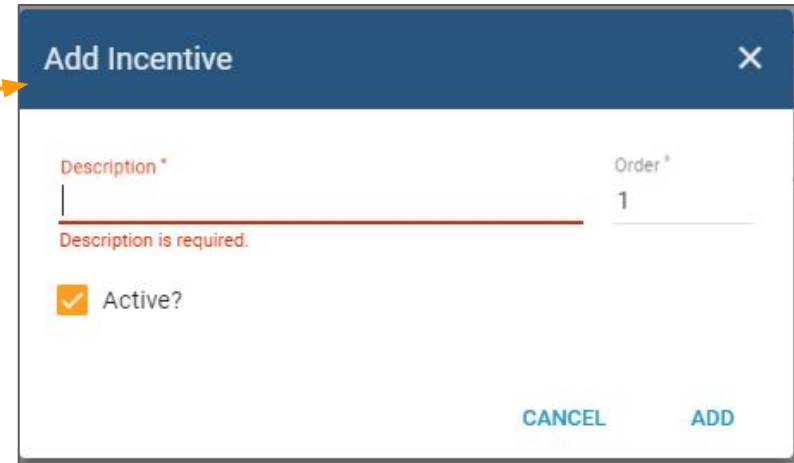
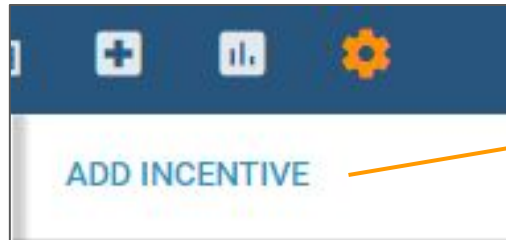
Name

Email

Phone
Ext.

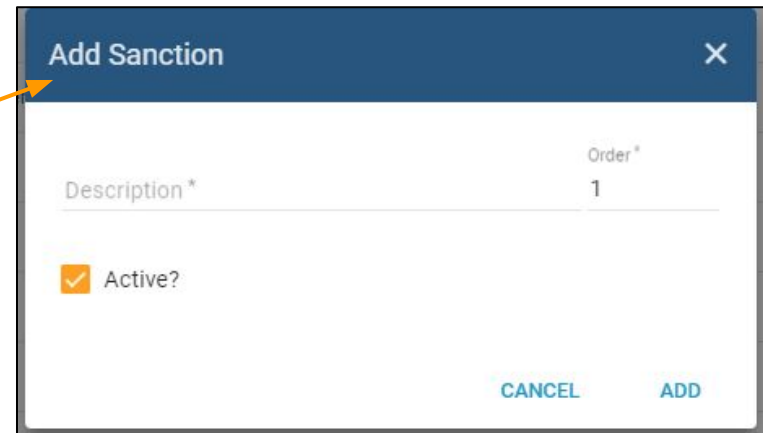
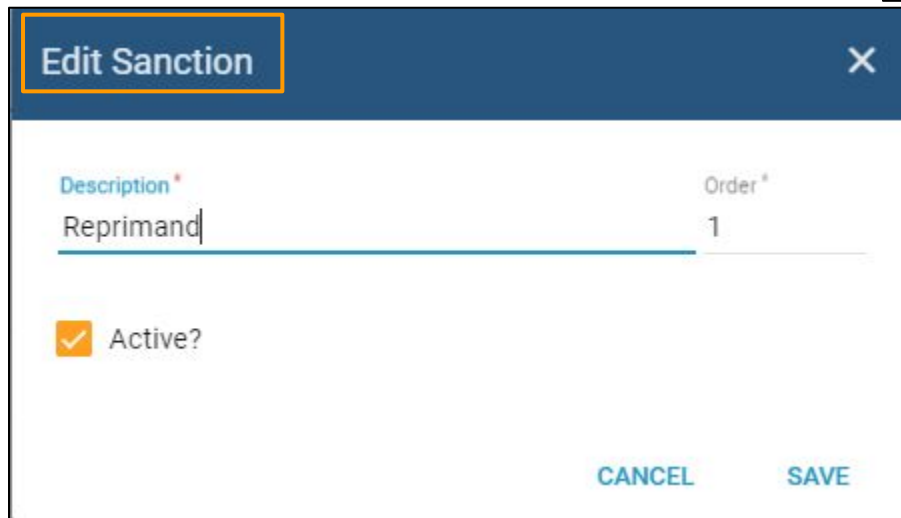
ADMINISTRATION - COMPLIANCE SETTINGS

Clicking on *Add Incentive* will allow the Admin to add a new Incentive. Admins will be prompted to add the Incentive name and indicate whether it is active or not. Admins can click on the pen icon to edit the Incentive.

A screenshot of a modal window titled 'Add Incentive' with a close button (X) in the top right corner. The form contains two input fields: 'Description *' and 'Order *'. The 'Description *' field is empty and has a red error message 'Description is required.' below it. The 'Order *' field contains the number '1'. Below these fields is a checkbox labeled 'Active?' which is checked. At the bottom right, there are two buttons: 'CANCEL' and 'ADD'.A screenshot of a modal window titled 'Edit Incentive' with a close button (X) in the top right corner. The form contains two input fields: 'Description *' and 'Order *'. The 'Description *' field contains the text 'Judge Recognition' and is underlined. The 'Order *' field contains the number '1'. Below these fields is a checkbox labeled 'Active?' which is checked. At the bottom right, there are two buttons: 'CANCEL' and 'SAVE'.

ADMINISTRATION - COMPLIANCE SETTINGS

Clicking on *Add Sanction* will allow the Admin to add a new Sanction. Admins will be prompted to add the Sanction name and indicate whether it is active or not. Admins can click on the pen icon to edit the Sanction.

A screenshot of the 'Add Sanction' modal. The title bar is dark blue with the text 'Add Sanction' and a close icon. The form has a 'Description *' text input field and an 'Order *' dropdown menu set to '1'. Below these is a checkbox labeled 'Active?' which is checked. At the bottom right are 'CANCEL' and 'ADD' buttons in blue text.A screenshot of the 'Edit Sanction' modal. The title bar is dark blue with the text 'Edit Sanction' and a close icon. The form has a 'Description *' text input field containing the text 'Reprimand' and an 'Order *' dropdown menu set to '1'. Below these is a checkbox labeled 'Active?' which is checked. At the bottom right are 'CANCEL' and 'SAVE' buttons in blue text.

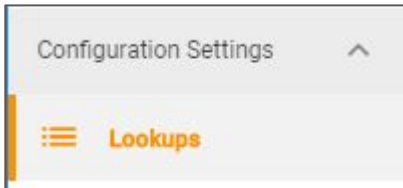
COMPLIANCE SETTINGS - SANCTIONS MATRIX

The **Sanctions Matrix** displays a list of all Infractions and the recommended Sanctions, as defined by the System Administrator for each individual Specialty Court.

Infraction	Offense #	Possible Sanctions	Policy Description(s)
Absence	1	Reprimand Two (2) hours community service	1st Offense - Miss meeting/fail to have proof of a support group meeting.
Absence	2	Reprimand Four (4) hours community service	2nd Offense - Miss meeting/fail to have proof of a support group meeting.
Absence	3	Reprimand Six (6) hours community service Jail	3rd Offense - Miss meeting/fail to have proof of a support group meeting.
Absence	4	Jail Termination	4th Offense - Miss meeting/fail to have proof of a support group meeting. 4th Offense - Miss meeting/fail to have proof of a support group meeting. Termination determined by level of honesty.
Failed Drug Test	1	Jail	1st Offense - Positive alcohol or other drug test or use violation. Jail sanction to be determined (minimum one day).
Failed Drug Test	2	Jail Termination	2nd Offense - Positive alcohol or other drug test or use violation. Three (3) - ten (10) days jail. 2nd Offense - Positive alcohol or other drug test or use violation.
Failed Drug Test	3	Jail Termination	3rd Offense - Positive alcohol or other drug test or use violation. Lengthy detention. 3rd Offense - Positive alcohol or other drug test or use violation.
Failure To Appear		Jail	Failure to appear in court.
Failure To Pay		Jail	Failure to pay fines or fees as per payment plan.
Forgery		Jail Termination	Forge meetings in Blue Book. Forge meetings in Blue Book. Termination determined by level of honesty.
Incomplete Community Service		Double community service requirement Jail	Failure to complete community service.
Refused Drug Test	1	Reprimand Two (2) hours community service Pay \$70 for confirmation testing	1st Offense - Late for or refused alcohol and other drug testing.
Refused Drug Test	2	Reprimand Four (4) hours community service Pay \$70 for confirmation testing Electronic monitoring	2nd Offense - Late for or refused alcohol and other drug testing.

ADMINISTRATION - CONFIGURATION SETTINGS

Admins can add additional details to Lookups, such as the list of allergies, Community Service worksite restrictions, drug of choice list, prescription drug list, etc. Clicking on the *Lookup* hyperlink will allow the admin add to the Lookup list for that specific Lookup item.



ID	Description	# of Lookups
allergies	The list of possible allergies	9
associate-tags	Additional "Tags" to apply for associate relationships to Client	7
bac-source	The list of possible BAC sources	2
child-custody-status	The list of possible child custody statuses	4
citizenship-status	The list of possible citizenship statuses	5
community-service-worksite-restriction-type	List of community service worksite restriction types.	3
contact-excusal-reason	The list of possible reasons for excusing a missed contact	3
country	The list of possible countries	4
drug-of-choice	The list of clients drugs of choice for drug use	12
drugs	The list of possible drugs	18
employment-status	The list of possible employment statuses	5
eye-color	The list of possible eye colors	9
hair-color	The list of possible hair colors	15
infectious-diseases	The list of possible infectious diseases	98

ADMINISTRATION - CONFIGURATION SETTINGS

Clicking on the *Lookup* hyperlink will allow the Admin to add the lookup list for that specific Lookup item.

SAVE CHANGES

Description

The list of prescription drugs available

Lookups

Value *			
Abilify		Active	-
Adderall		Active	-
Ambien		Active	-
amoxicillin		Active	-
ibuprofen		Active	-
OxyContin		Active	-
Percocet		Active	-
Prozac		Active	+ -

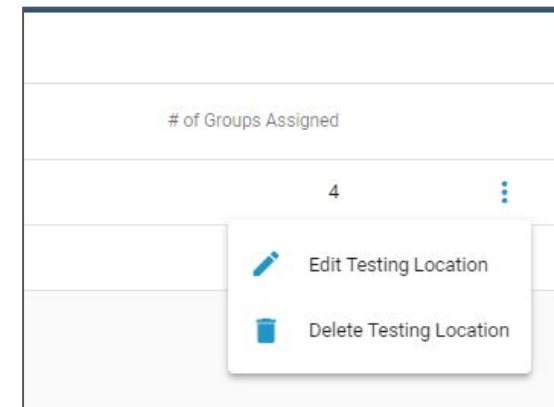
© AutoMon | Version 1.20.0 DD1488-23

ADMINISTRATION - DRUG TESTING SETTINGS

Under the Drug Testing Settings, Admins can add drug testing locations. Drug Test groups are assigned to testing locations. This allows different locations to have the same Drug Testing group name. This also allows each Drug Testing location to have a different phone number that Clients can call into to see if their Drug Testing group as been selected.

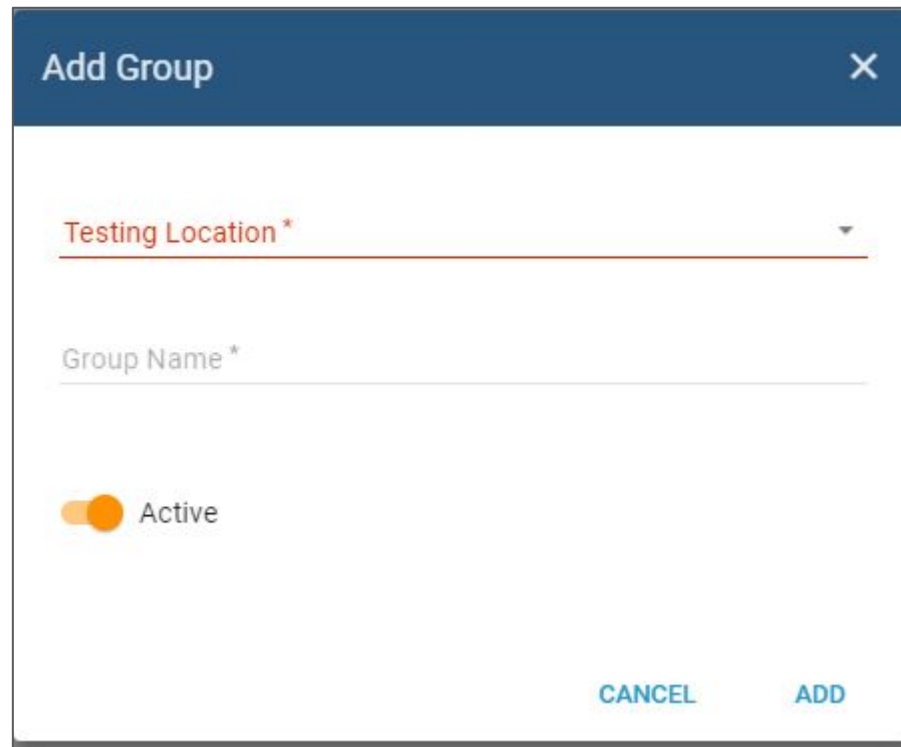
ADD TESTING LOCATIONS				
Name ↑	Security Location	Phone Number	AutoMon IVR	# of Groups Assigned
Arizona	Arizona	480-360-0437	Yes	4
Testing Place	Arizona		No	0

Clicking on the *More* icon allows Admins to edit or delete a Drug Testing location.



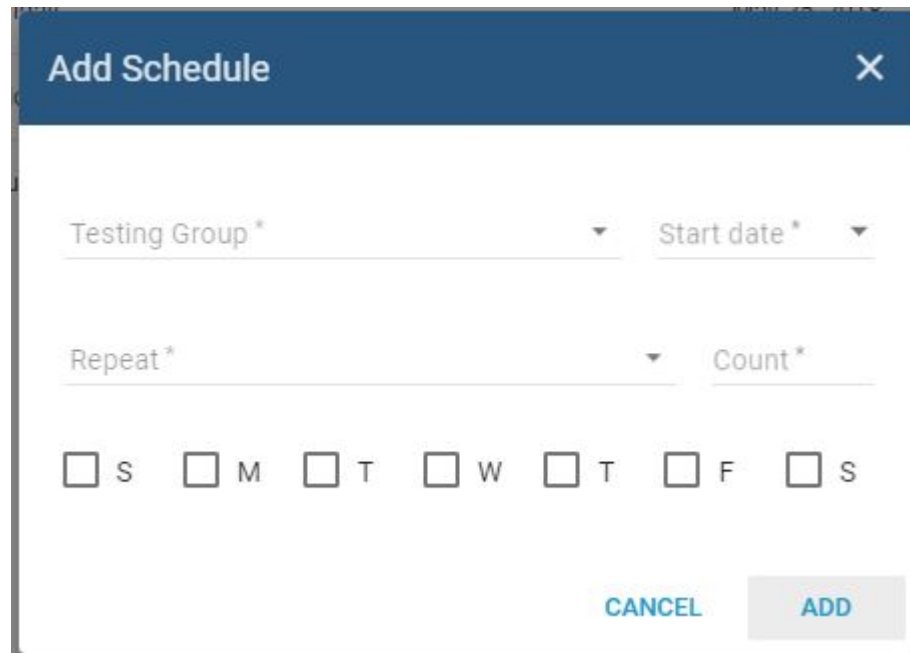
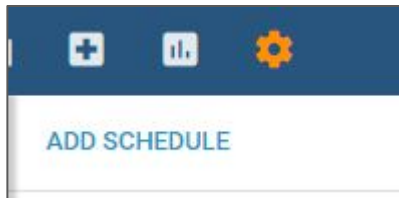
ADMINISTRATION - DRUG TESTING SETTINGS

Admins can click on the *Add Group* link to add a new Drug Test group. When adding a new Drug Test group, the Admin is required to add the testing location and the group name.

A screenshot of a modal window titled 'Add Group' with a close button (X) in the top right corner. The form contains two required text input fields: 'Testing Location *' and 'Group Name *'. Below these fields is a toggle switch labeled 'Active', which is currently turned on. At the bottom right of the modal are two buttons: 'CANCEL' and 'ADD'.

ADMINISTRATION - DRUG TESTING SETTINGS

Admins can click on the *Add Schedule* link to add drug testing randomization. This schedule will automatically schedule drug tests based on the randomization rules.

A screenshot of a 'Add Schedule' dialog box. The dialog has a dark blue header with the title 'Add Schedule' and a close button (X). The main area is white and contains four dropdown menus: 'Testing Group *', 'Start date *', 'Repeat *', and 'Count *'. Below these are seven checkboxes labeled S, M, T, W, T, F, and S. At the bottom right are two buttons: 'CANCEL' in blue text and 'ADD' in a grey button.

ADMINISTRATION - DRUG TESTING SETTINGS

Admins can click on the *Add Device* link to add a new drug testing device. This is the device(s) that is being used to collect the UI samples (i.e SmartCups, Oral Swabs, etc.). When adding a device, Admins are required to enter a device name; Admins can also add the panels for each device. Each panel details a specific drug that is being tested.



Add Device

Name *

☒ Active?

Name is required.

Panels

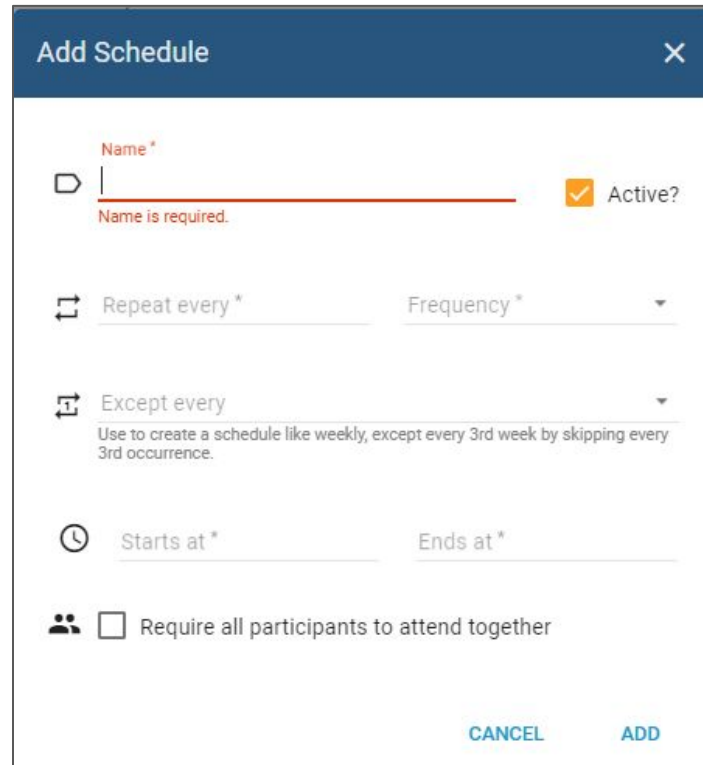
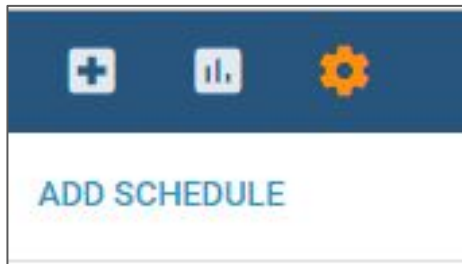
Drug	Cutoff	Units	-	+
Drug	Cutoff	Units	-	+
Drug	Cutoff	Units	-	+

CANCEL

SAVE

ADMINISTRATION - HEARING SETTINGS

Admins can click on the *Add Schedule* link to create a Docket schedule. The Admin will be required to enter the Docket schedule name, indicate the frequency, and indicate if the schedule requires that all Clients attend the hearing together.

A screenshot of a modal window titled 'Add Schedule' with a close button (X) in the top right corner. The form contains the following fields and controls:

- Name ***: A text input field with a red border and a red error message 'Name is required.' below it. To its right is a checked checkbox labeled 'Active?'.
- Repeat every ***: A text input field with a calendar icon to its left.
- Frequency ***: A dropdown menu with a downward arrow.
- Except every**: A dropdown menu with a downward arrow and a subtext: 'Use to create a schedule like weekly, except every 3rd week by skipping every 3rd occurrence.'
- Starts at ***: A text input field with a clock icon to its left.
- Ends at ***: A text input field.
- Require all participants to attend together**: A checkbox with a group of people icon to its left.
- CANCEL** and **ADD**: Two blue buttons at the bottom right.

ADMINISTRATION - SPECIALTY COURT SETTINGS

Admins can click on the *Add Court Type* link under the Specialty Court Settings section. This will allow an Admin to add a new Court type. The Admin is required to type the Court Type name and the Involvement ID prefix. Admins can also indicate if the Court type manages DUI cases.



Add Court Type

Name *

Name is required

Involvement ID Prefix *

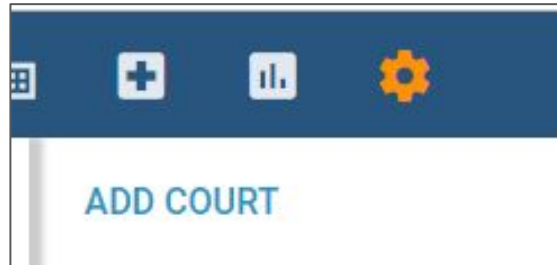
☐ Manages DUI Cases

CANCEL

ADD

ADMINISTRATION - SPECIALTY COURT SETTINGS

Admins can click on the *Add Court* link under the Specialty Court Settings section. Once the new Court has been entered, Admins will have the ability to set up the Court configuration, such as the judge assigned to the Court, Court type, Court name, and security location.



DETAILS

Court type *

Name *

Judge

Location *

SAVE

ADMINISTRATION - SPECIALTY COURT SETTINGS

Admins can click on the name of the Court to add or edit Court details.

Name	Judge	Location	Court Type
Drug Court 1		Arizona	Drug Court
DUI Court 1		Arizona	DUI Court
Mental Health Court 1		Arizona	Mental Health Court
Veterans Court 1		Arizona	Veterans Court






ADMINISTRATION - SPECIALTY COURT SETTINGS

Within *Specialty Court Settings*, Admins can add program Track(s). Phases are assigned to Tracks. Tracks can be used to group clients together – this grouping can be based by risks, needs, severity of charge, etc. To add multiple Tracks, Admins can click on the + icon on the right. Click on the *Default* hyperlink to edit/configure the Default Track. Once in the Track, Admins can click on the + icon to add a new Phase or click on the pen icon to edit an existing Phase.

Tracks

+

Default

Phases				+
ORDER	NAME	DRUG TESTING	DOCKET SCHEDULE	
1	Stabilization	Yellow Group 1 time per week on Tuesday, Thursday		
2	Recovery	Red Group 1 time per week on Monday		
3	Transition	Blue Group 1 time per month on Wednesday		
4	Pre-Release	Green Group 1 time per week on Friday		
5	Support			

ADMINISTRATION - SPECIALTY COURT SETTINGS

For each Phase, Admins are required to provide the Phase name, the order of the Phase, and the Phase duration. If applicable, Admins can indicate the Docket schedule and the Drug Testing color.















DETAILS

Name *	Order *
Stabilization	1
Minimum Duration *	Units *
3	months ▼
Docket Schedule	▼
Drug Testing Group	▼
Yellow Group	▼

ADMINISTRATION - SPECIALTY COURT SETTINGS

Below the Phase details are the Milestones for the Phase. Admins can click on the blue + button to add additional Milestones.

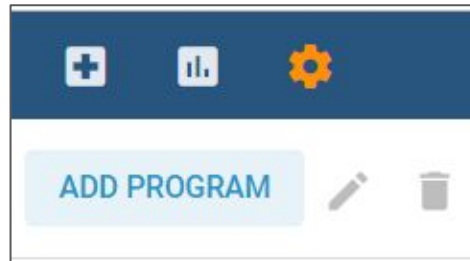
Milestones

1	Sign contract		Task	0	Days Sober	
2	Sign color line		Task	0	Days Sober	
3	Report to re-entry or recovery facility as ordered		Task	3	Days Sober	
4	Report to case manager		Task	3	Days Sober	
5	Contact Dr. Murphey		Task	7	Days Sober	
6	Contact treatment provider to enter treatment		Task	7	Days Sober	
7	Review participant handbook		Task	7	Days Sober	
8	Seek sponsor		Task	7	Days Sober	
9	Attend support group meetings		Subjective	Days due	Days Sober	
10	Seek or maintain employment		Subjective	Days due	Days Sober	
11	Punctuality		Subjective	Days due	Days Sober	
12	30 days sobriety		Sobriety	Days due	30	 

SAVE

ADMINISTRATION - TREATMENT/EDUCATION SETTINGS

Admins can click on the *Add Program* link under the Treatment/Education section to add a new Program. Programs are assigned to specific security locations.



Add Program

Name *

Name is required

Active

Available Security Locations:

☐ Arizona

☐ Arizona > Maricopa

☐ Arizona > Maricopa > Phoenix

☐ Arizona > Maricopa > Phoenix > Drug Court

☐ Arizona > Maricopa > Phoenix > Veterans Court

☐ Arizona > Maricopa > Scottsdale

☐ Arizona > Maricopa > Scottsdale > Drug Court

>>

>

<

<<

Selected Security Locations:



CANCEL

ADD

ADMINISTRATION - TREATMENT/EDUCATION SETTINGS

Admins have the ability to edit or delete Programs, as needed. Programs can only be deleted as so long there are no Clients enrolled into the Program. Clicking on the checkbox to the left will enable the pen icon to *Edit* and the trash can icon to *Delete*.

ADD PROGRAM



Program ↑

Active

Enrollments

Assigned Security Locations

☒

Generic Recovery Program

Yes

114

9

▼

☐

Helping Hands Rehab

Yes

0

1

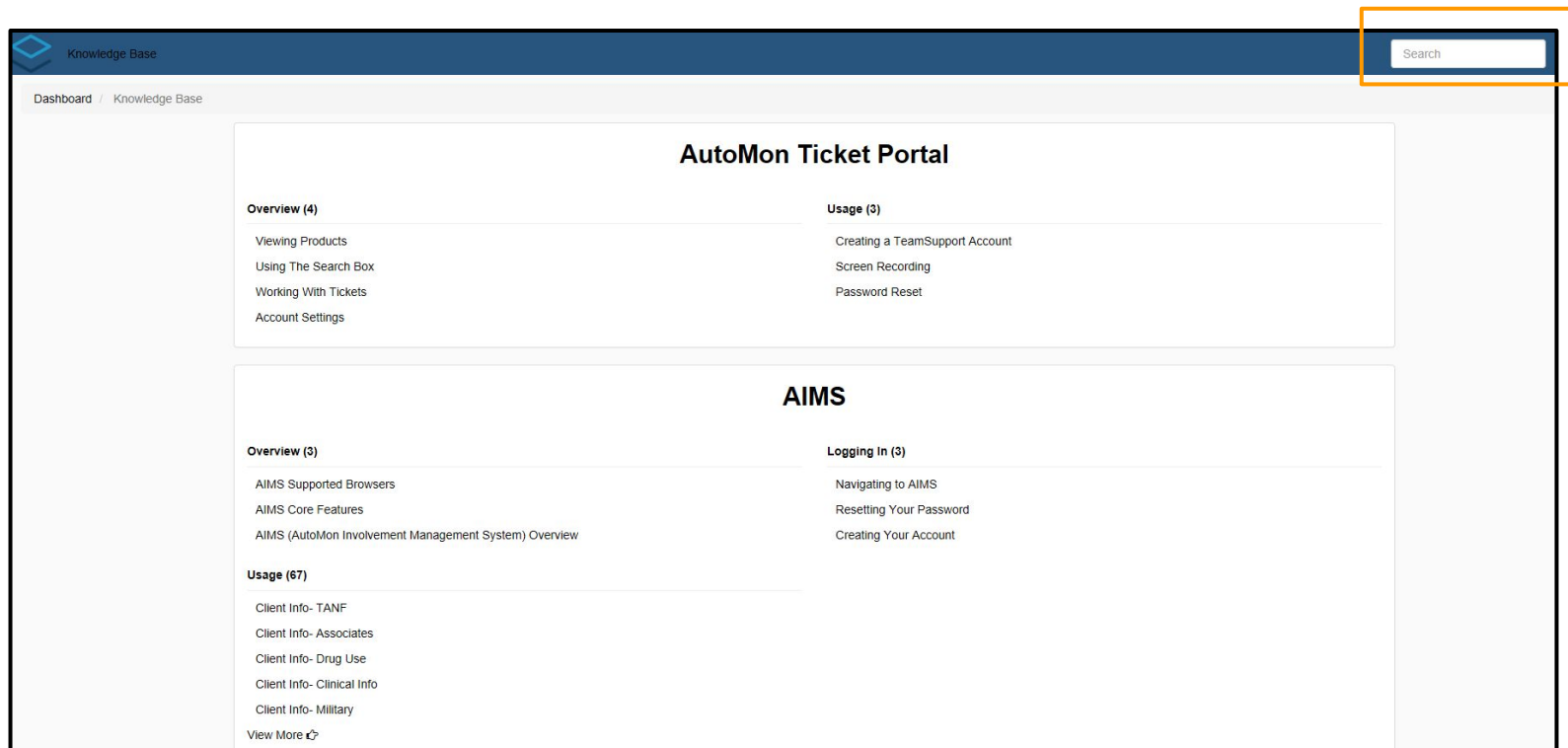
▼

ADD PROGRAM  			
Program ↑	Active	Enrollments	
<input type="checkbox"/> Generic Recovery Program	Yes	114	
<input checked="" type="checkbox"/> Helping Hands Rehab	Yes	0	

Subtopics:

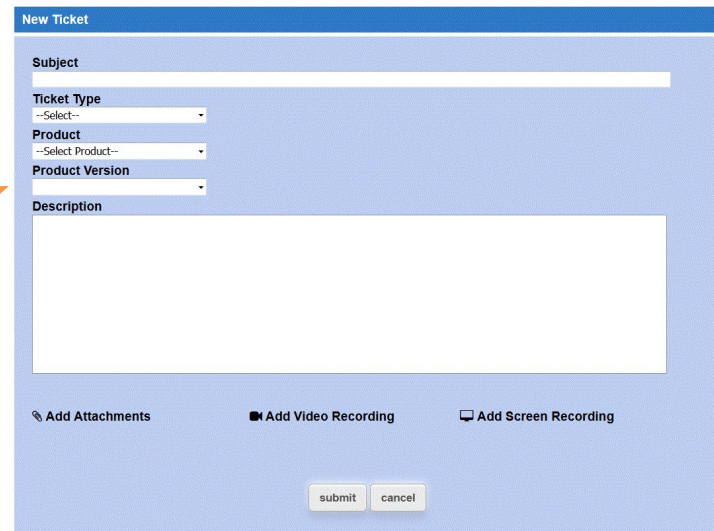
1. Searching Knowledge Base
2. Reporting Issues

Knowledge Base has a search field at the top of the screen. Users can type a keyword into the field and click “**Search**”. The search will reveal any Knowledge Base articles related to the keyword. Users can select the row of the article to access the article which will include text and screenshots related to their question.



SUPPORT - REPORTING ISSUES

Questions/issues/problems related to the operability of the system should first be reported to the System Administrator on site. If the System Admin is unable to answer the question and/or resolve the issue, they should report the issue to IT or your Court's designated contact. If IT is unable to resolve the issue, the issue should then be reported to AutoMon via AutoMon's support portal, *TeamSupport*. When submitting Support tickets, all relevant information shown below should be completed fully, including customer name, staff with the question/issue, product name and version, any error message, troubleshooting that has been attempted, (screenshots, etc.).

A screenshot of the 'New Ticket' form in the AutoMon support portal. The form has a blue header with the title 'New Ticket'. Below the header, there are several input fields: 'Subject' (a text box), 'Ticket Type' (a dropdown menu with '--Select--' as the selected option), 'Product' (a dropdown menu with '--Select Product--' as the selected option), and 'Product Version' (a dropdown menu). Below these fields is a large text area for the 'Description'. At the bottom of the form, there are three checkboxes: 'Add Attachments', 'Add Video Recording', and 'Add Screen Recording'. At the very bottom, there are two buttons: 'submit' and 'cancel'.