



# 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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6. [Drug Testing](#)
7. [Hearings](#)
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18. [Supervision](#)
19. [Treatment/Education Attendance](#)
20. [Accounting](#)
21. [Community Service](#)
22. [Notes](#)
23. [Documents & Forms](#)
24. [Tasks](#)
25. [Referrals & Intakes](#)
26. [Administration](#)
27. [Support](#)

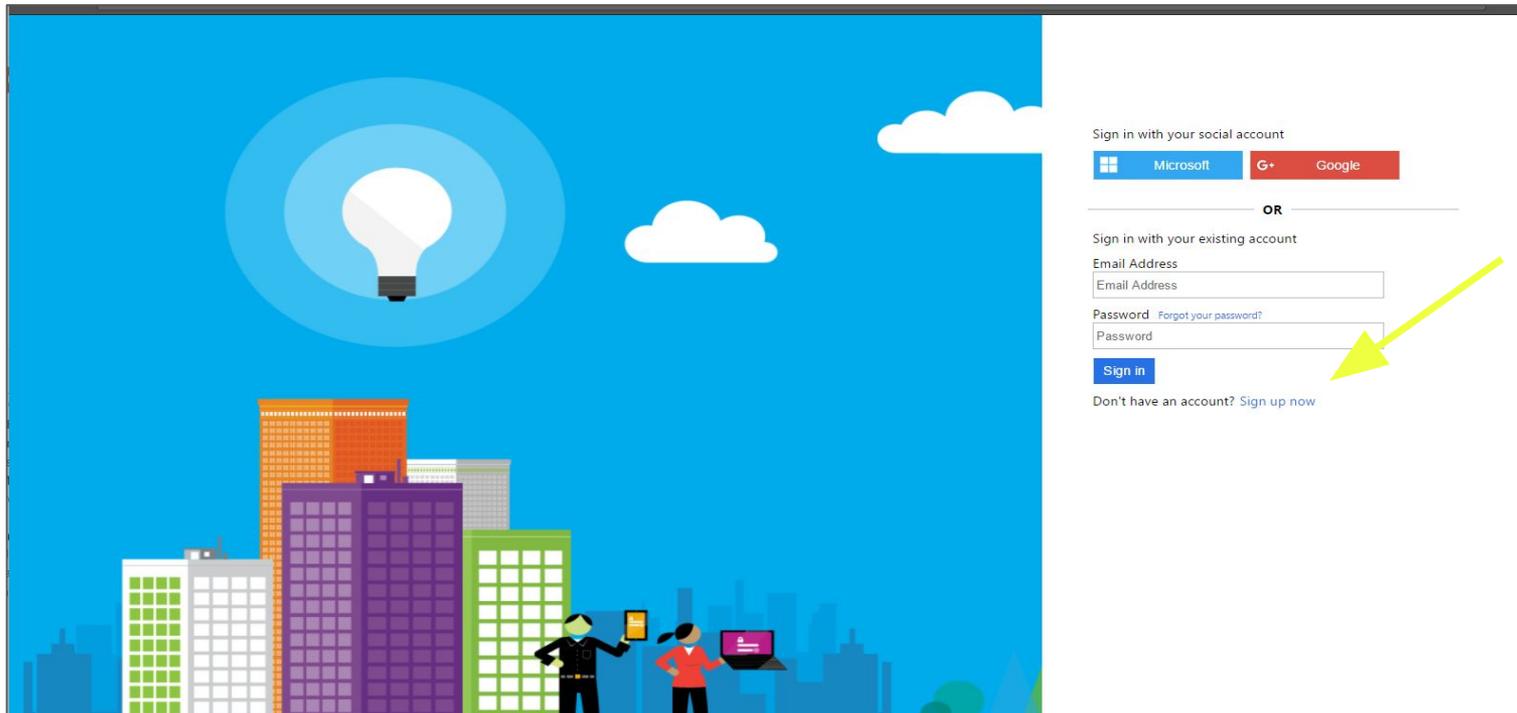
## Subtopics:

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

## STEPS

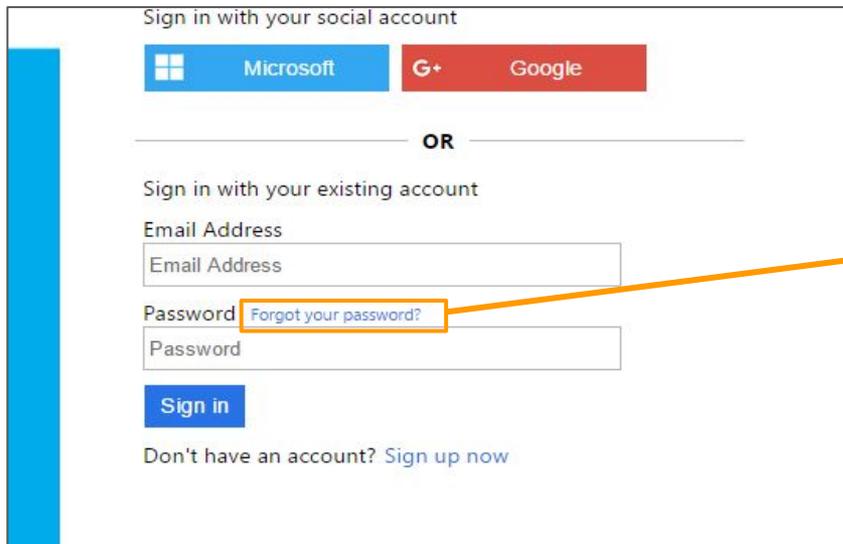
To create your account:

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.



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

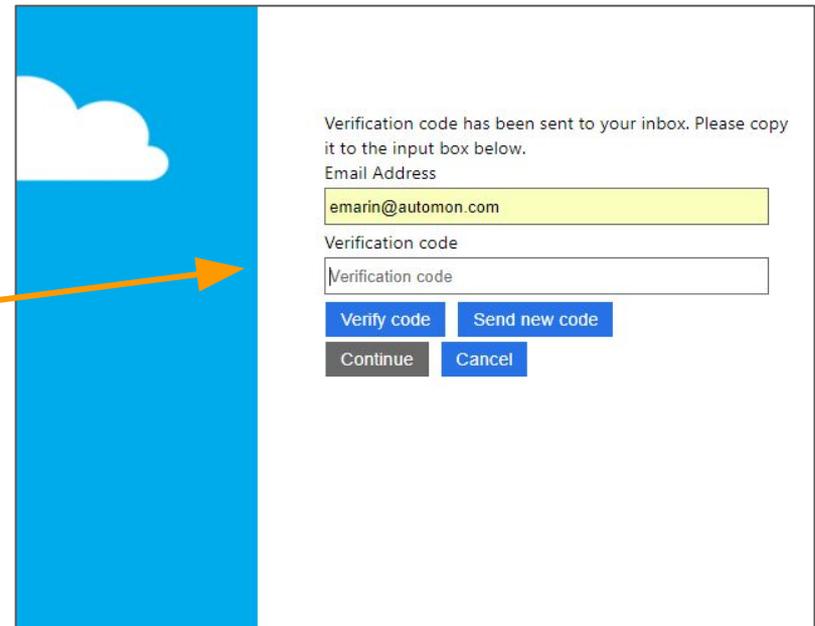
Email Address

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

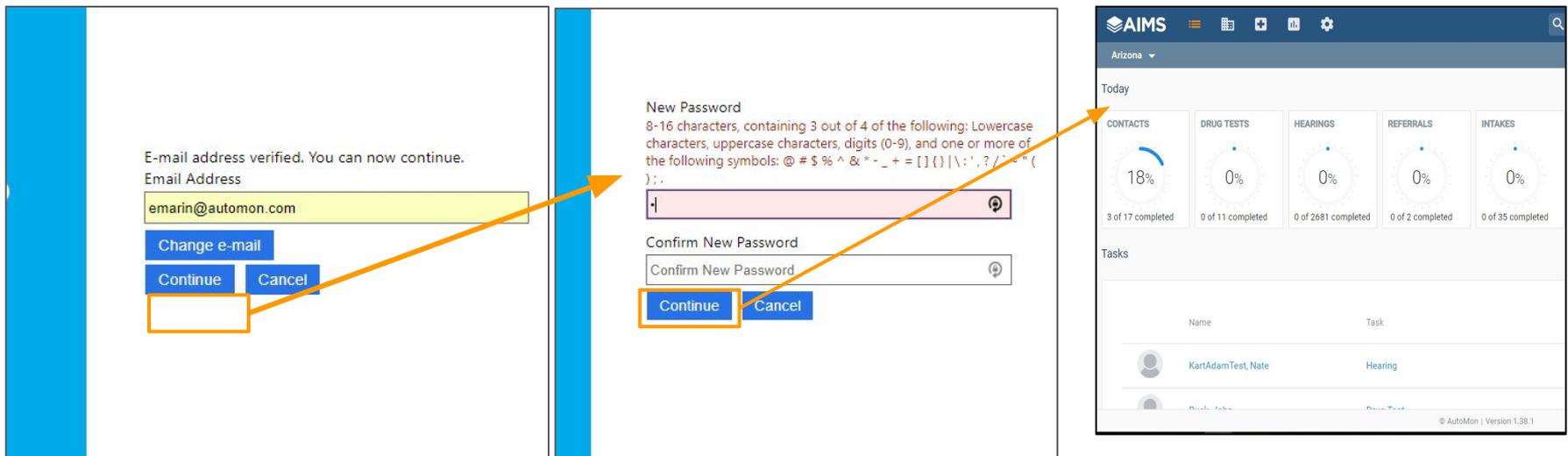
Continue Cancel

# 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 from the AIMS system illustrating the password reset process:

- Left Screenshot:** Shows a confirmation screen with the message "E-mail address verified. You can now continue." Below this, the email address "emarin@automon.com" is displayed in a yellow box. There are two buttons: "Change e-mail" and "Continue". The "Continue" button is highlighted with a blue box and an orange arrow pointing to the right.
- Middle Screenshot:** Shows the "New Password" form. The password requirements are listed in red text: "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 the requirements are two password input fields: "New Password" and "Confirm New Password". The "Continue" button is highlighted with a blue box and an orange arrow pointing to the right.
- Right Screenshot:** Shows the AIMS home page dashboard. The top navigation bar includes the AIMS logo, a location dropdown set to "Arizona", and various utility icons. The main content area features a "Today" summary 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 listing tasks, including one for "KartAdamTest, Nate" with a "Hearing" task.

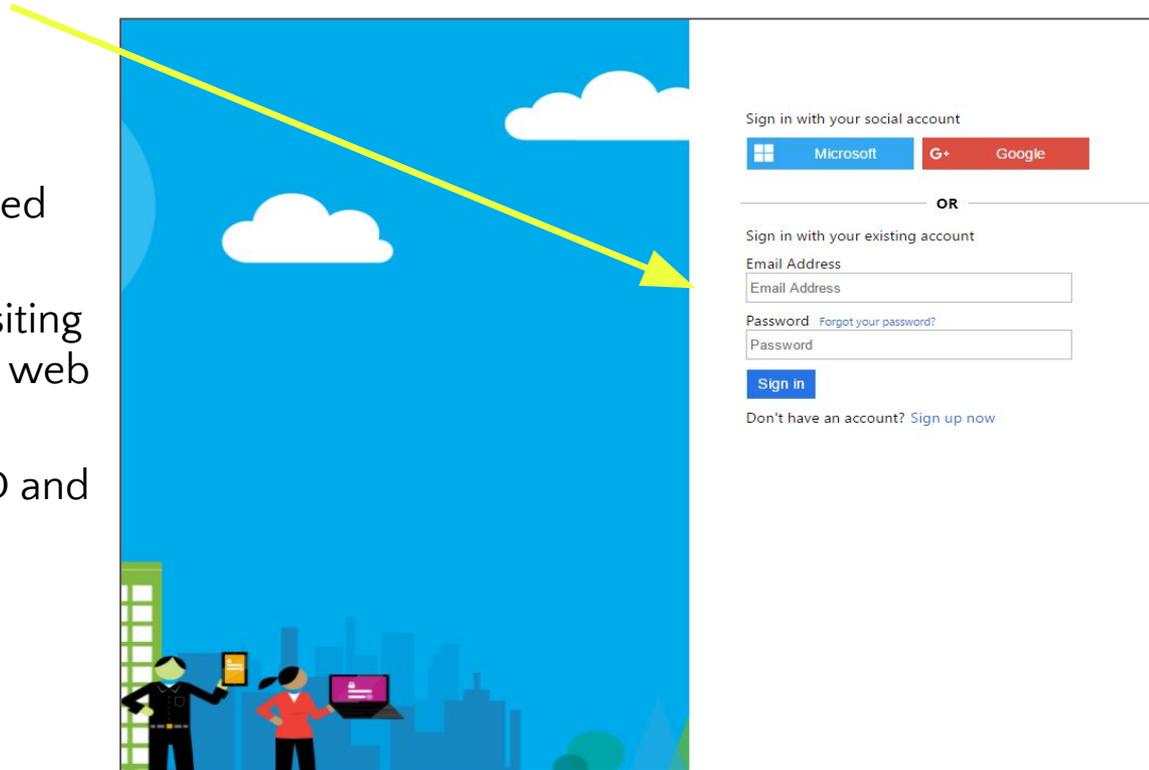
## STEPS

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”



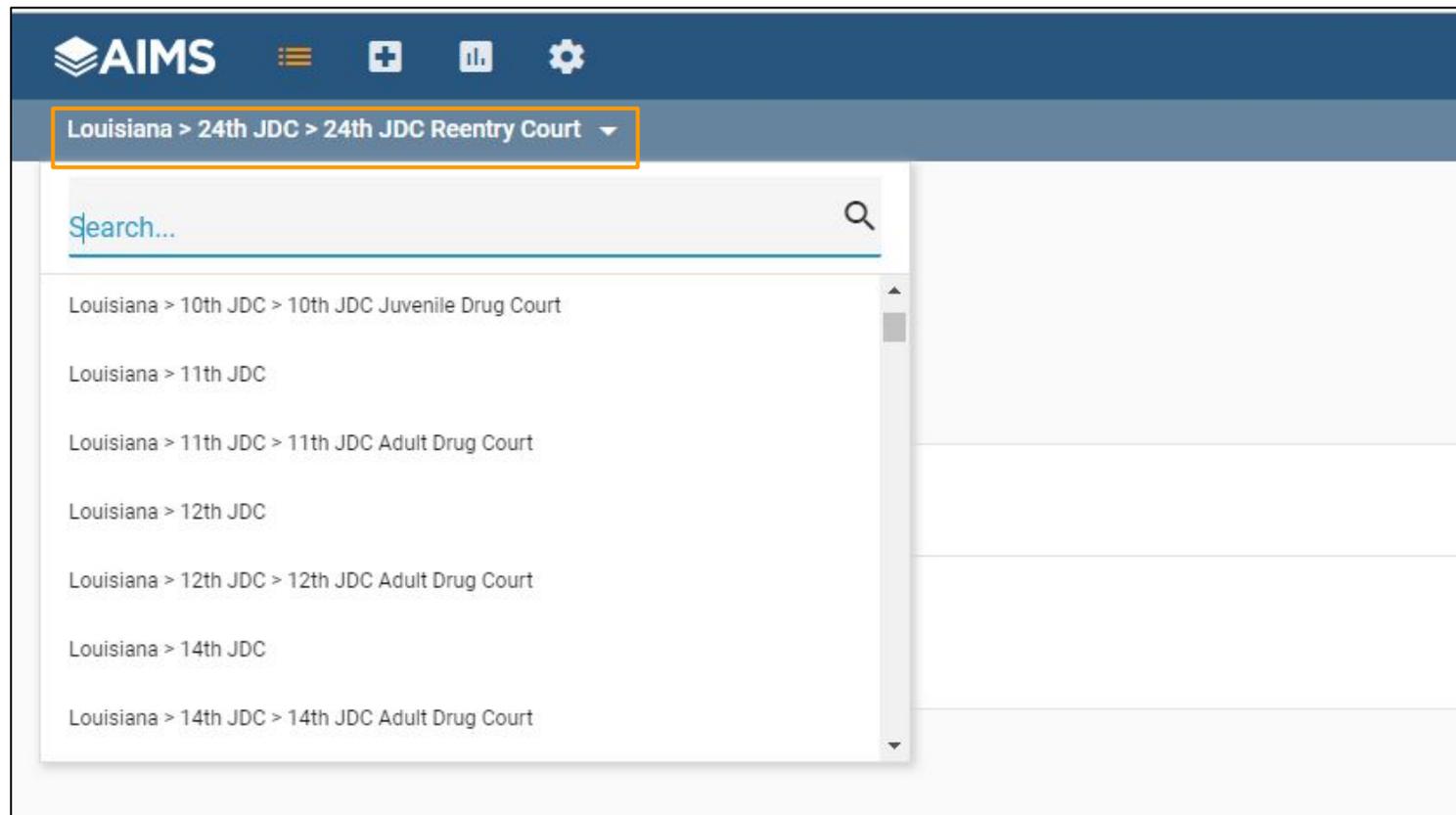
## Subtopics

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.

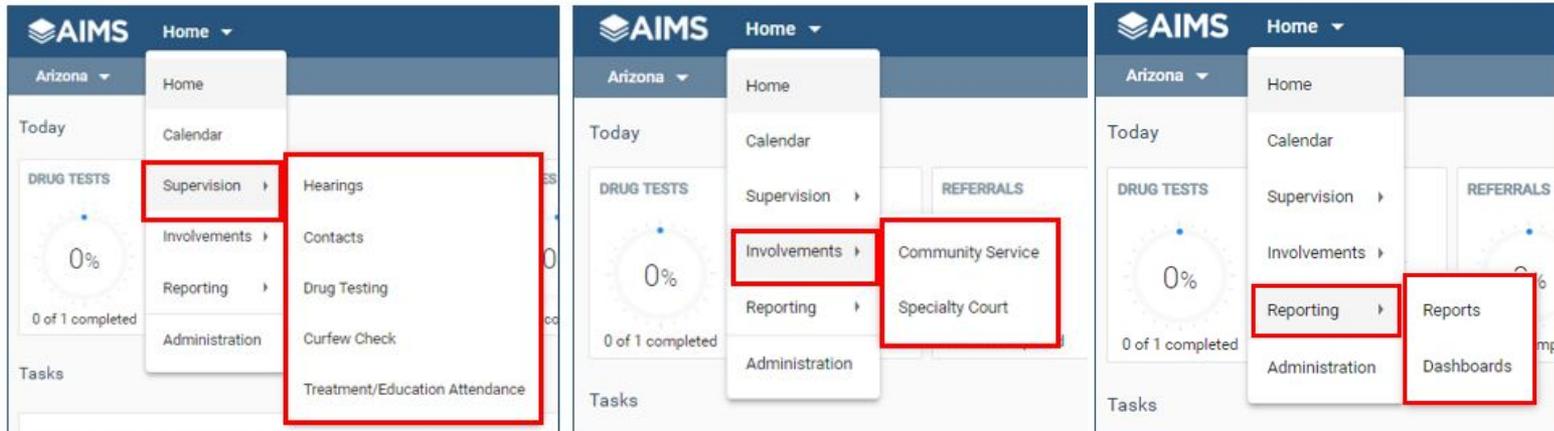
**Security Location** - AIMS supports security locations. Each user is configured for a specific security location(s). This allows the user to only see data from security locations they have permissions to, as well as create new data for those same locations.



# 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

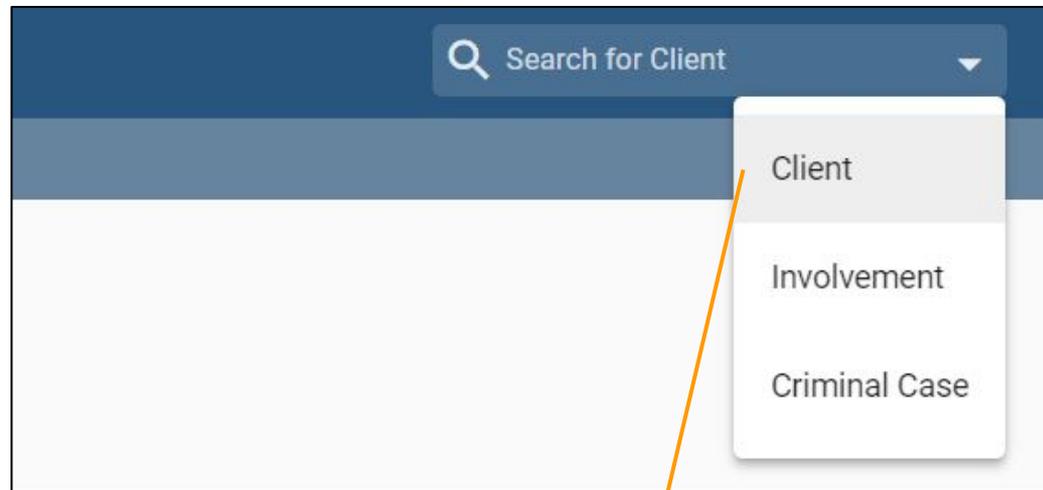
Users with permission will have the ability to upload location-specific documents. These documents will not be specific to the Client but the security location instead. Users with permissions will have the ability to upload, edit the title and description, or delete the document.

State of Louisiana > 11th JDC > Sabine > ADC

Documents							
<a href="#">ADD DOCUMENT</a>   							
<input type="checkbox"/>	Title ↓	Descriptions	File Name	File Type	File Size	Added Date	Added By
<input type="checkbox"/>	Client Contract	Phoenix Drug Court Client Intake Contract	Contract.pdf	Portable Document Format	971 KB	02/04/2018	Jon Doe
<input type="checkbox"/>	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.

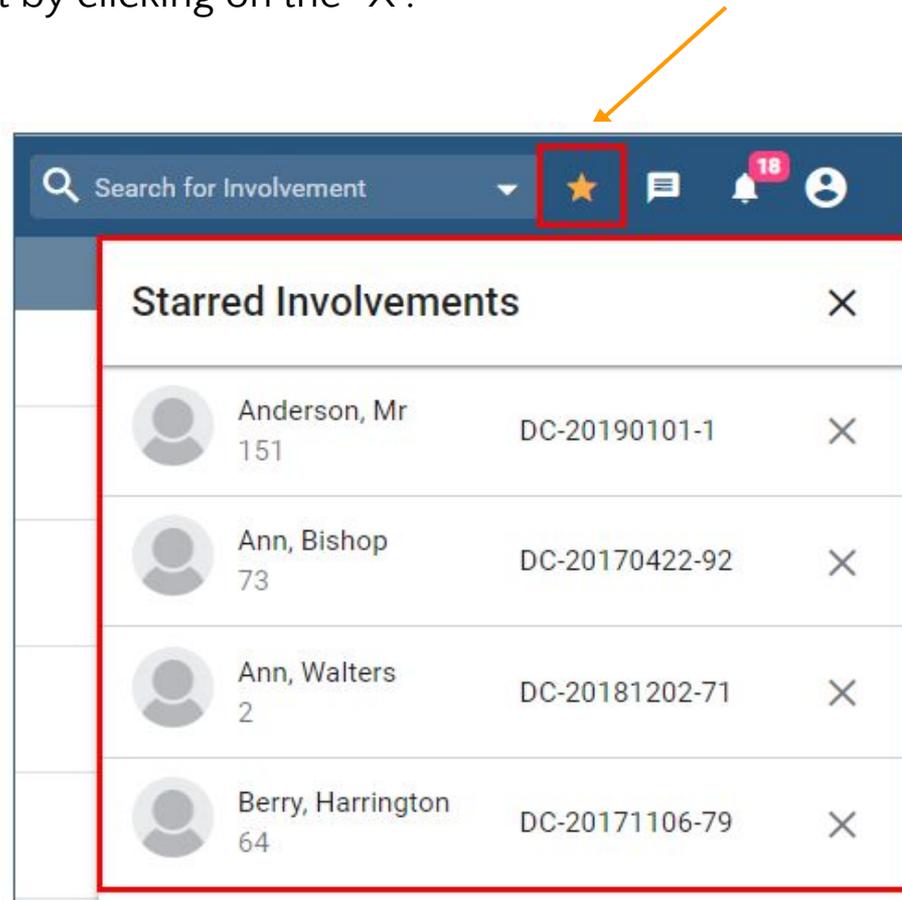


A screenshot of the search results table. The search bar contains the text "bruce johnson". The table has two columns: "Client" and "Involvement ID".

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

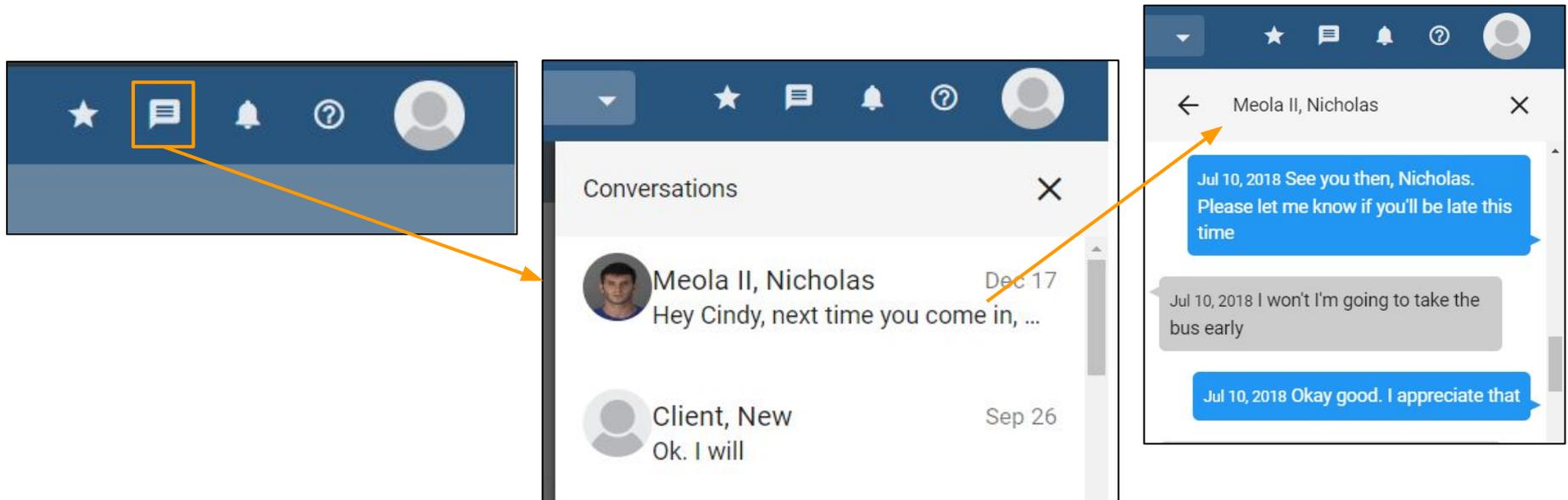
The **Starred Involvements** icon displays a list of Clients that have been added to the Starred Involvements list for quick-access. This functionality is useful for Users to quickly navigate to a Client's record who they frequently access. Clients can easily be added or removed from the Starred Involvements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



Starred Involvements			X
	Anderson, Mr 151	DC-20190101-1	X
	Ann, Bishop 73	DC-20170422-92	X
	Ann, Walters 2	DC-20181202-71	X
	Berry, Harrington 64	DC-20171106-79	X

# MASTER HEADER - SMS MESSAGING

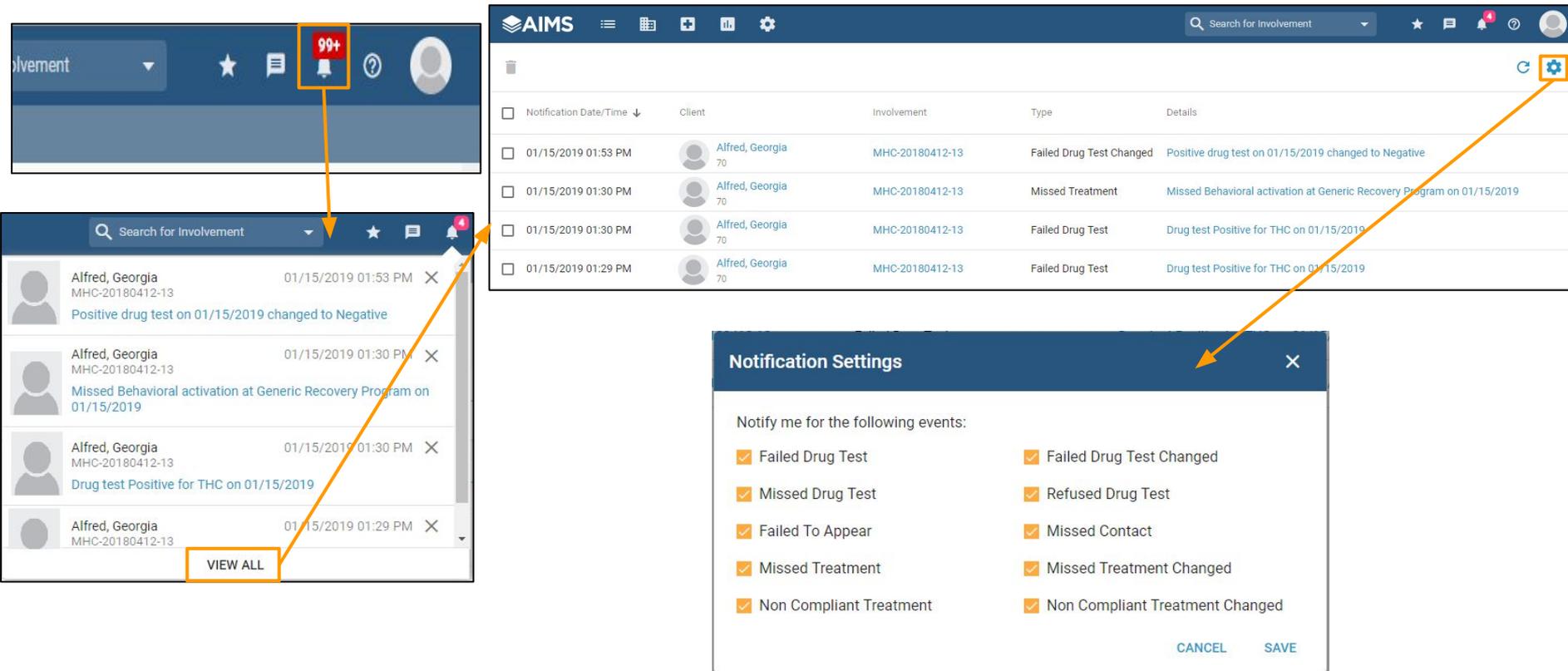
The **SMS Messaging** icon allows Users to view recent text messages exchanged between Users and Clients. Users can click on the Client's name to view all of the messages between the User and that Client.



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 AIMS system. It shows the notification icon in the master header, a list of notifications, and the Notification Settings dialog.

**Notification Settings**

Notify me for the following events:

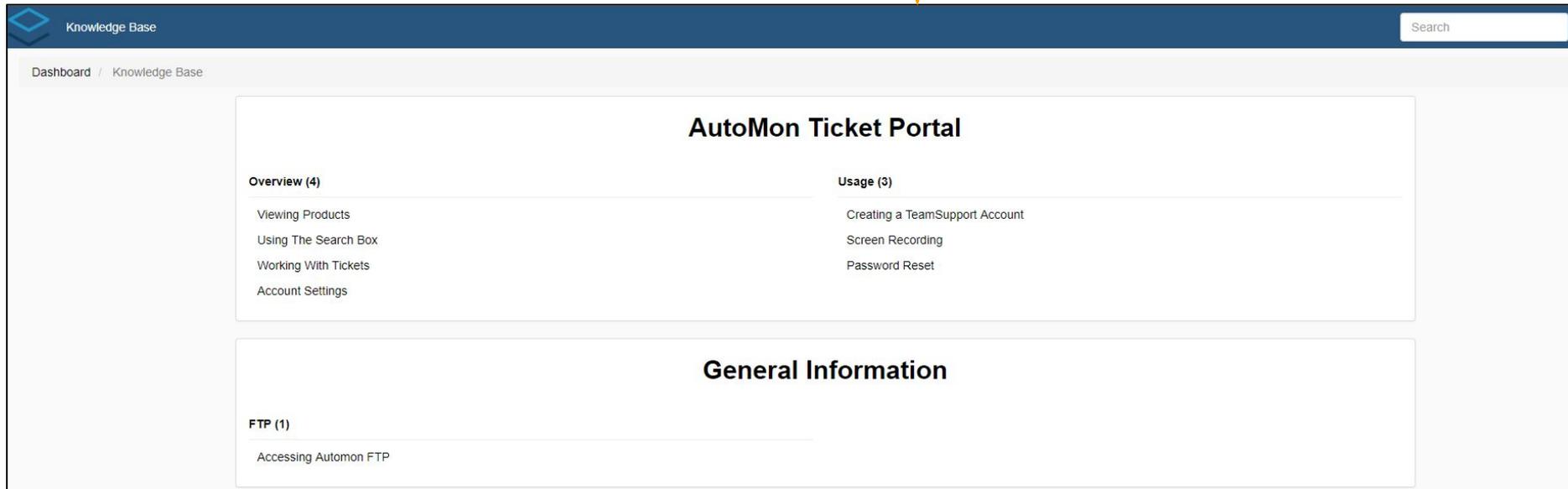
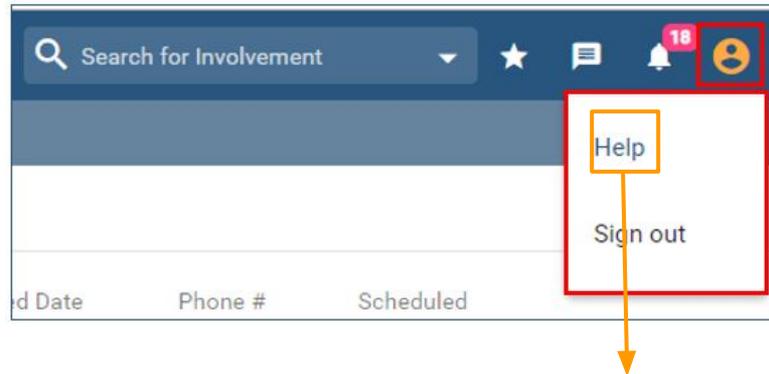
- Failed Drug Test
- Failed Drug Test Changed
- Missed Drug Test
- Refused Drug Test
- Failed To Appear
- Missed Contact
- Missed Treatment
- Missed Treatment Changed
- Non Compliant Treatment
- Non Compliant Treatment Changed

CANCEL SAVE

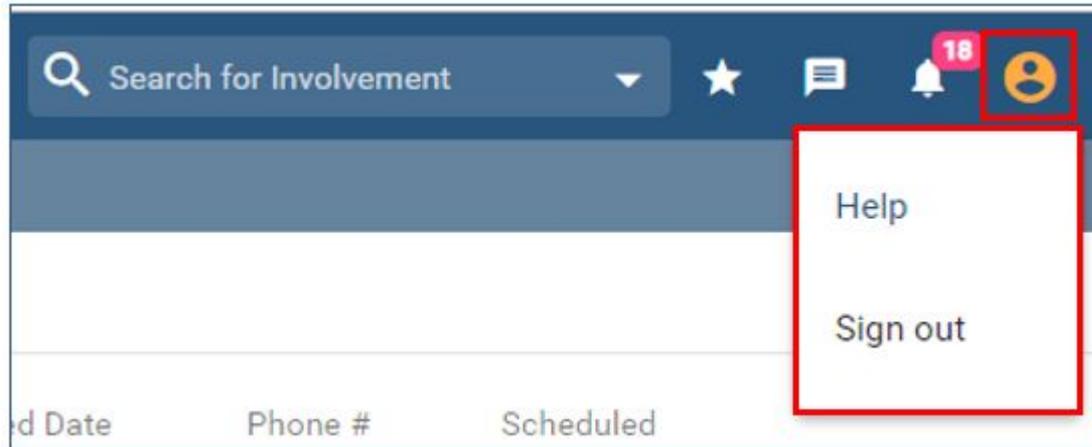
Notification Date/Time	Client	Involvement	Type	Details
01/15/2019 01:53 PM	Alfred, Georgia 70	MHC-20180412-13	Failed Drug Test Changed	Positive drug test on 01/15/2019 changed to Negative
01/15/2019 01:30 PM	Alfred, Georgia 70	MHC-20180412-13	Missed Treatment	Missed Behavioral activation at Generic Recovery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



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

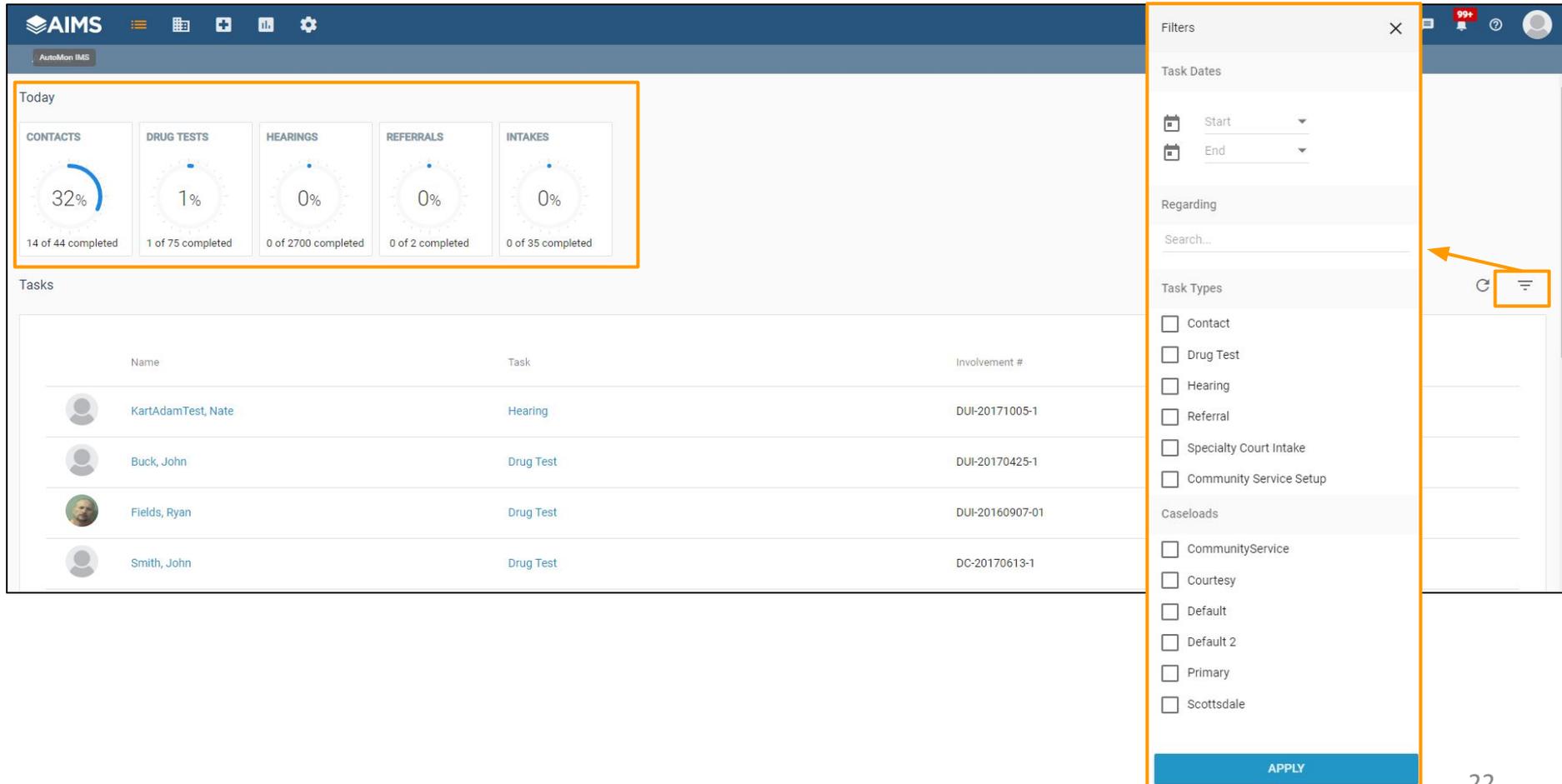


## Subtopics:

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.

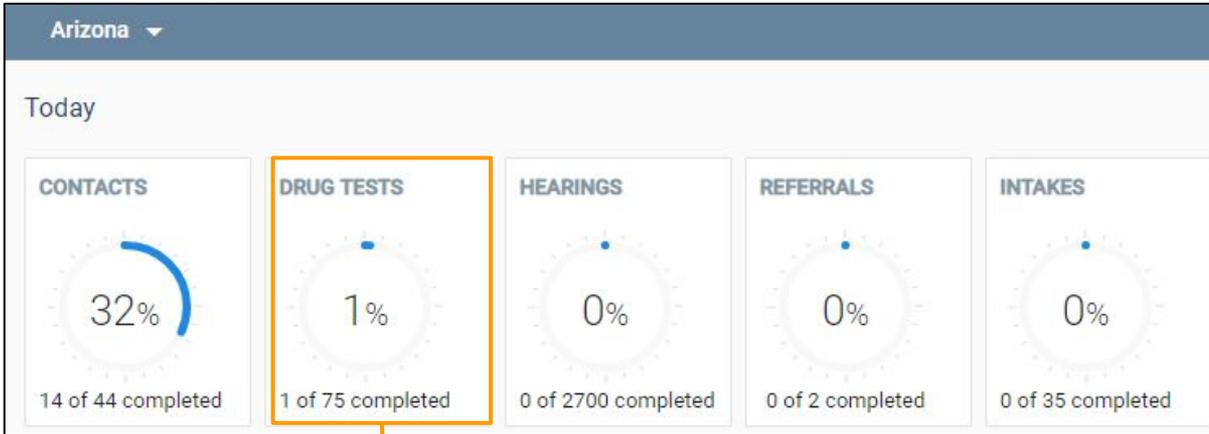
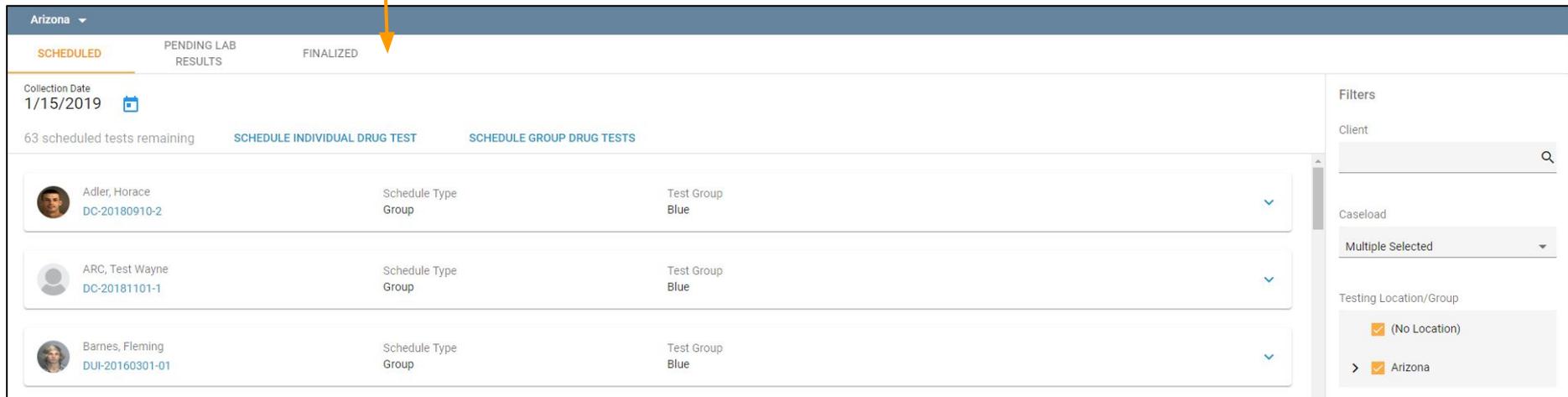


The screenshot displays the AIMS AutoMon interface. At the top, the 'Today' section features five progress charts for CONTACTS (32%), DRUG TESTS (1%), HEARINGS (0%), REFERRALS (0%), and INTAKES (0%). Below this is a 'Tasks' table listing client tasks. A 'Filters' sidebar is open on the right, showing options for Task Dates, Regarding, Task Types, and Caseloads. An orange box highlights the filters sidebar, and an arrow points to a refresh icon in the top right corner of the sidebar.

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

# 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	Schedule Type Group	Test Group Blue
ARC, Test Wayne DC-20181101-1	Schedule Type Group	Test Group Blue
Barnes, Fleming DUI-20160301-01	Schedule Type Group	Test Group Blue

Filters:

- Client: [Search]
- Caseload: Multiple Selected
- Testing Location/Group:
  - (No Location)
  - Arizona

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	<a href="#">Hearing</a>
 Caddy, Stan	<a href="#">Hearing</a>
 Davis, Brad	<a href="#">Hearing</a>

Arizona ▾

← **Hearing Info**   

STATUS Pending

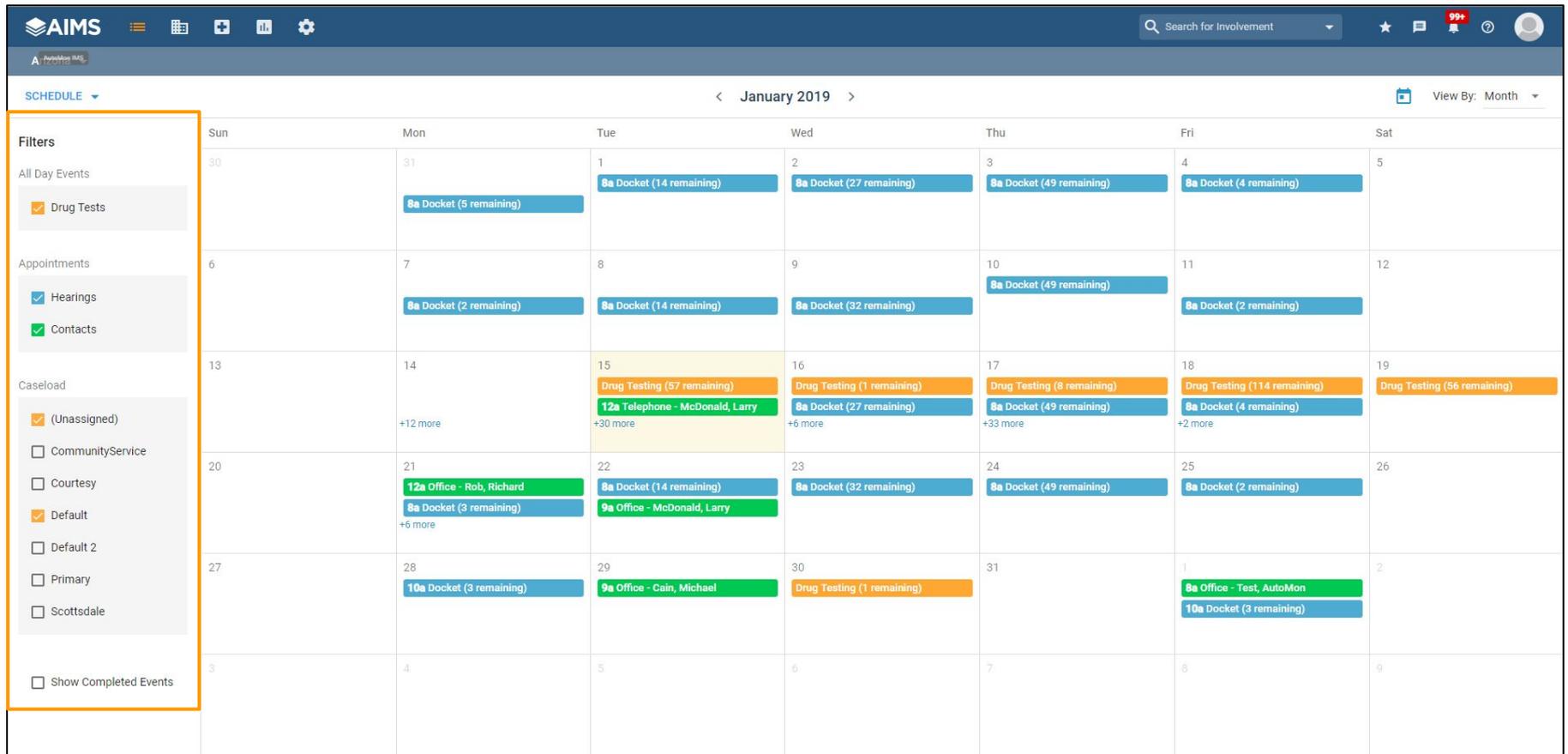
INVOLVEMENT # DC-20180409-1

HEARING DATE Tuesday, Jan 1, 2019

## Subtopics:

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

The **Calendar** manages Hearings (Dockets), Drug Tests, and Reporting Requirements for each Court. The Calendar can be viewed by the day, week, or month, and has the ability to filter for specific activities.



The screenshot displays the AIMS Calendar interface for January 2019. The interface includes a top navigation bar with the AIMS logo, a search bar, and user profile information. Below the navigation bar, there is a 'SCHEDULE' dropdown and a 'View By: Month' selector. The main calendar grid shows days from Sunday to Saturday, with various events represented by colored blocks. A 'Filters' sidebar on the left allows users to filter events by category and status.

**Filters:**

- All Day Events
  - Drug Tests
- Appointments
  - Hearings
  - Contacts
- Caseload
  - (Unassigned)
  - CommunityService
  - Courtesy
  - Default
  - Default 2
  - Primary
  - Scottsdale
  - Show Completed Events

**Calendar Data (January 2019):**

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 (8 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
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.

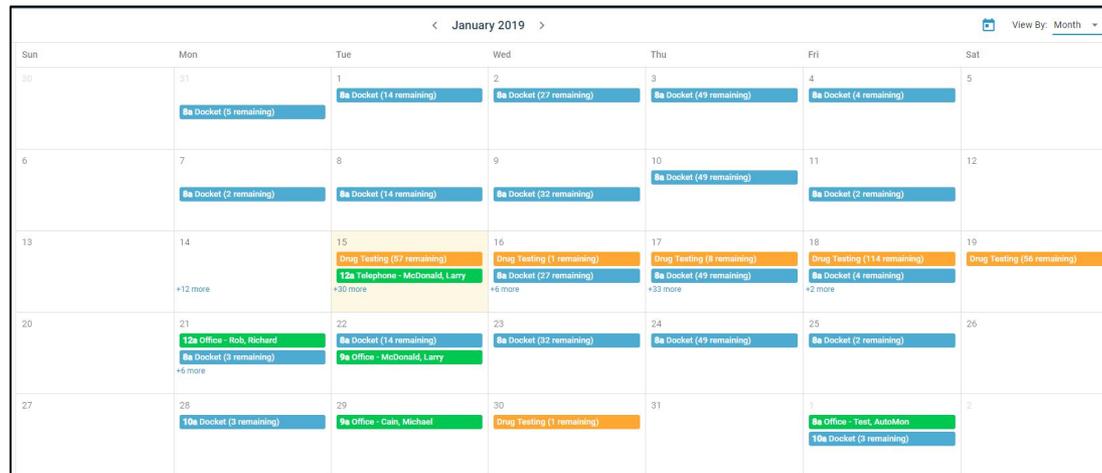


Daily



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 illustrates the process of scheduling new appointments from the calendar. It shows three screenshots:

- Schedule Individual Drug Test:** This modal window allows users to set a test date (1/15/2019), specify client involvement (with a red error message indicating it is required), and choose the frequency (Repeat every 1 day). It also includes options for when the test ends: after 1 occurrence, on a specific date, or never ends.
- Schedule Group Drug Tests:** This modal window allows users to set a test date (1/15/2019), select a testing location, and choose a test group.
- Schedule Contact:** This modal window allows users to set a contact date (1/15/2019), select a contact type, and specify start and end times. It also includes a client involvement field with a red error message indicating it is required.

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

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	

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.

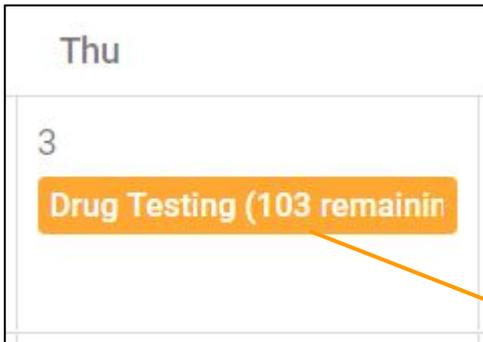
	8	9
	15 Drug Testing (109 remainir 9a Docket (1 remaining)	16

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	▼

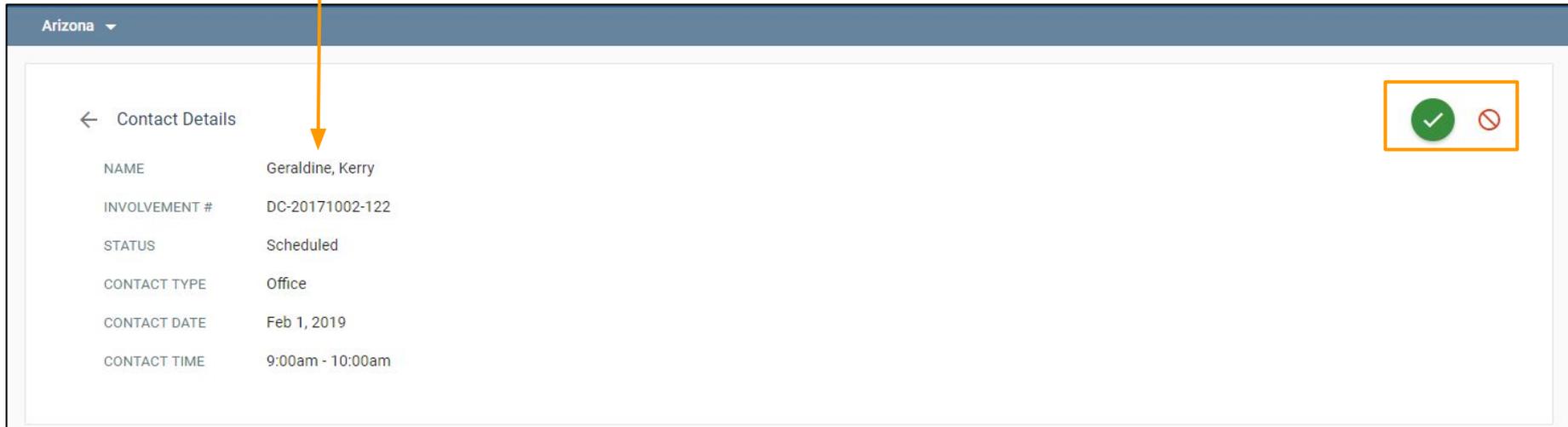
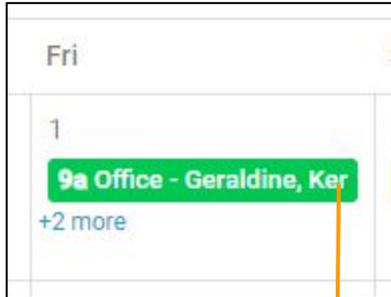
Filters

Client

Caseload  
Multiple Selected

Testing Location/Group  
 (No Location)  
 Arizona

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.



Arizona ▾

← 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

Green checkmark icon and red prohibition icon

## 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

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 +

	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"/>	 <b>Freda, Alfred</b>	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	
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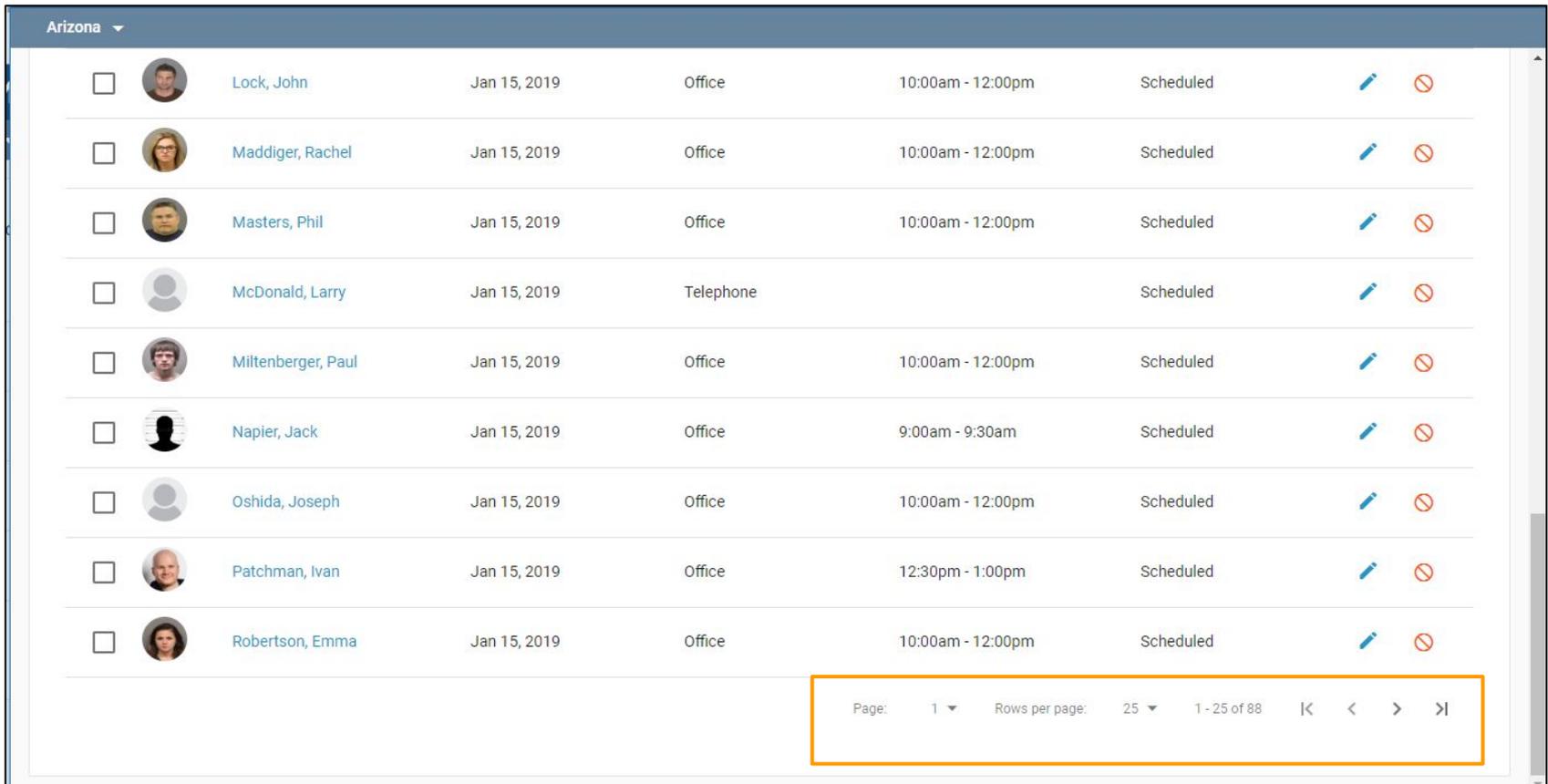
Arrest —  Referral 12/22/2018 —  Approval/Denial Approved: 12/22/2018 —  Admitted 12/22/2018 

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

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.



The screenshot shows a list of contacts for the state of Arizona. Each contact entry includes a checkbox, a profile picture, the contact name, date, location, time range, status, and edit/delete icons. The pagination controls at the bottom right are highlighted with an orange box.

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

⊘

	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
 
 ⏪ < > ⏩

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	 
<input checked="" 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 - 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								
<input type="checkbox"/>	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			



### Schedule Contact

**Client Involvement \***

**Client Involvement required**

**Contact Type \***

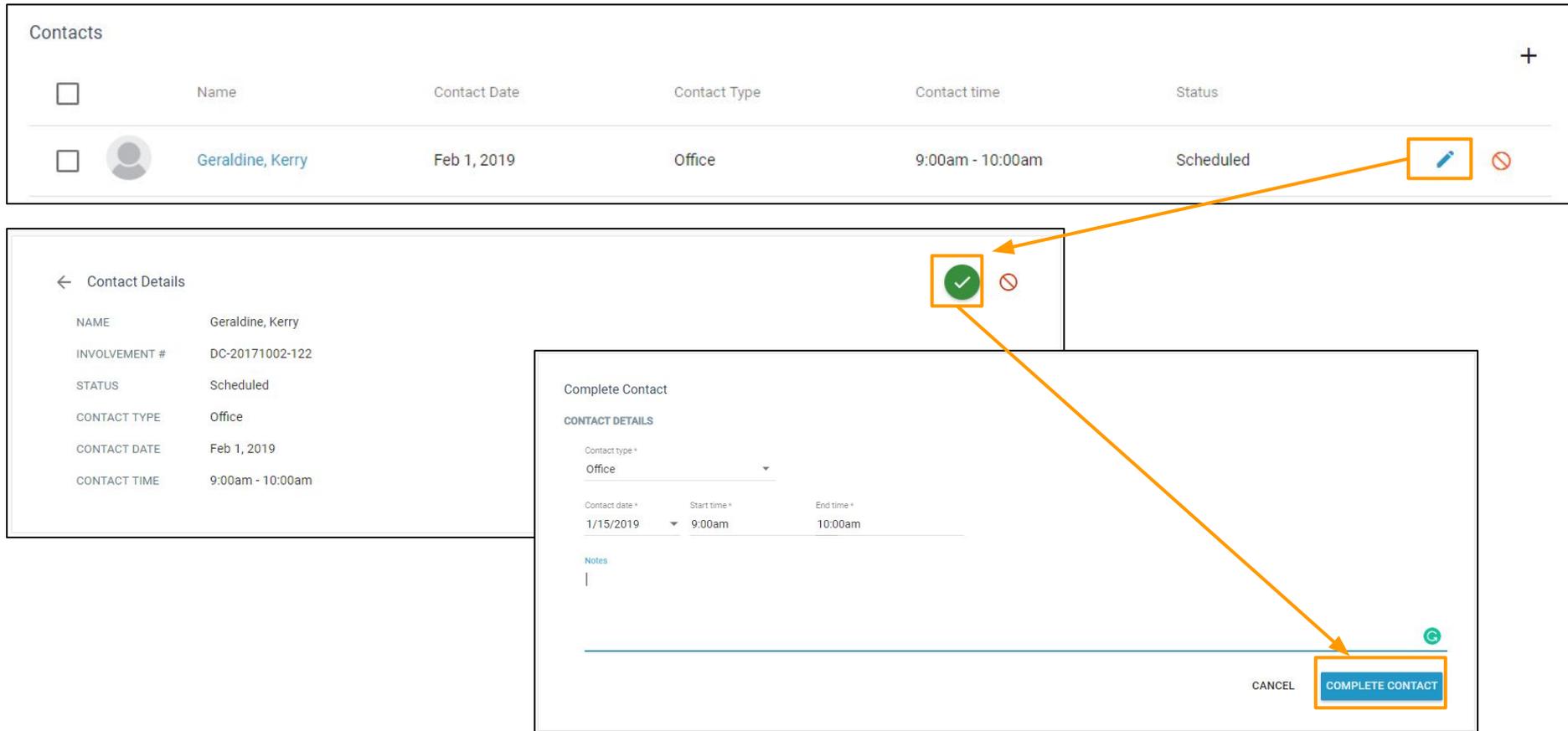
**Contact Date \*** 1/15/2019 

**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.



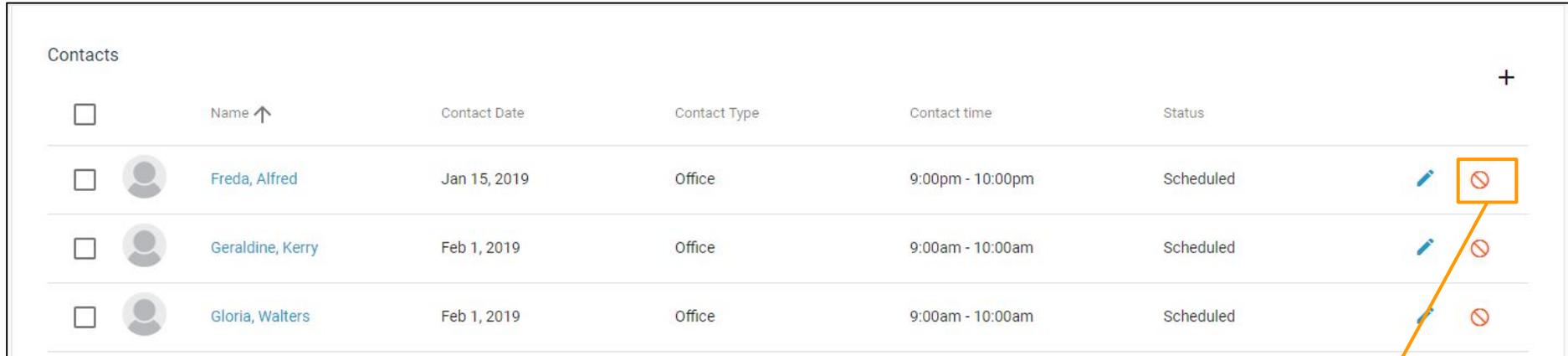
The screenshot illustrates the workflow for completing a contact in the AutoMon system. It is divided into three main sections:

- Contacts List:** A table with columns for Name, Contact Date, Contact Type, Contact time, and Status. A row for 'Geraldine, Kerry' is highlighted, with a pen icon (edit) and a red 'no' icon (missed) at the end of the row.
- Contact Details:** A view showing the contact's information: NAME (Geraldine, Kerry), INVOLVEMENT # (DC-20171002-122), STATUS (Scheduled), CONTACT TYPE (Office), CONTACT DATE (Feb 1, 2019), and CONTACT TIME (9:00am - 10:00am). A green checkmark icon and a red 'no' icon are visible at the top right of this section.
- Complete Contact Form:** A form titled 'Complete Contact' with the following fields:
  - CONTACT DETAILS:** Contact type (Office), Contact date (1/15/2019), Start time (9:00am), and End time (10:00am).
  - Notes:** A text area for adding notes.
  - Actions:** 'CANCEL' and 'COMPLETE CONTACT' buttons. A green checkmark icon is positioned above the 'COMPLETE CONTACT' button.

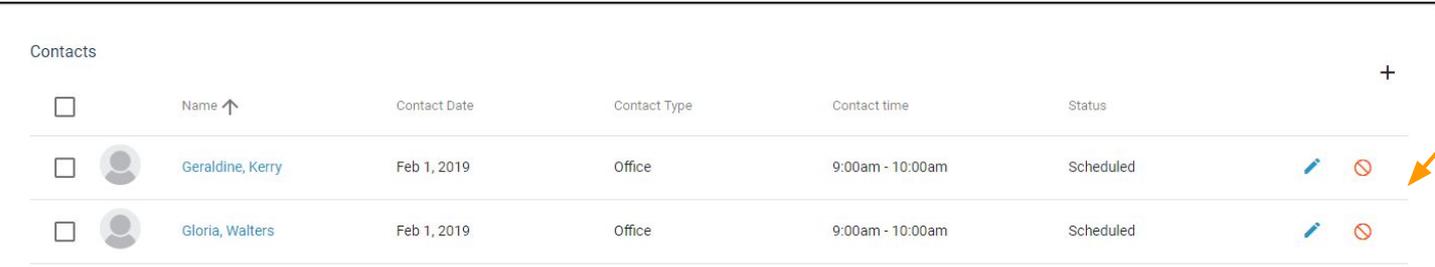
Orange arrows indicate the flow of the process: from the pen icon in the contacts list to the 'no' icon in the details view, and from the 'no' icon to the 'COMPLETE CONTACT' button in the form.

# CONTACTS - MARK AS MISSED

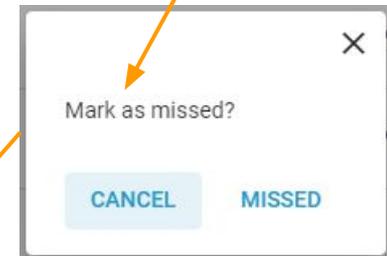
If a Client misses a scheduled Contact appointment, Users can click the *Mark as Missed* icon. The User will be presented with a confirmation dialog. Their name will then disappear from the scheduled list.



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"/>	 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			



Contacts							+	
<input type="checkbox"/>	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?

## 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](#)

	<b>Barrow, Thomas</b> <a href="#">DUI-20161019-73</a>	Schedule Type By Group	Group Blue	▼
	<b>Conner, Alexis</b> <a href="#">DUI-20161019-73</a>	Schedule Type By Group	Group Blue	▼
	<b>Lane, Constance</b> <a href="#">DUI-20170228-33</a>	Schedule Type By Group	Group Blue	▼
	<b>Montoya, Art</b> <a href="#">DUI-20161019-73</a>	Schedule Type By Group	Group Blue	▼
	<b>Phillips, Dan</b> <a href="#">DC-20180226-1</a>	Schedule Type Individual		▼
	<b>Randall, Jack</b> <a href="#">DUI-20161019-73</a>	Schedule Type By Group	Group Blue	▼
	<b>Sellers, Valerie</b>	Schedule Type	Group	

Filters

Client

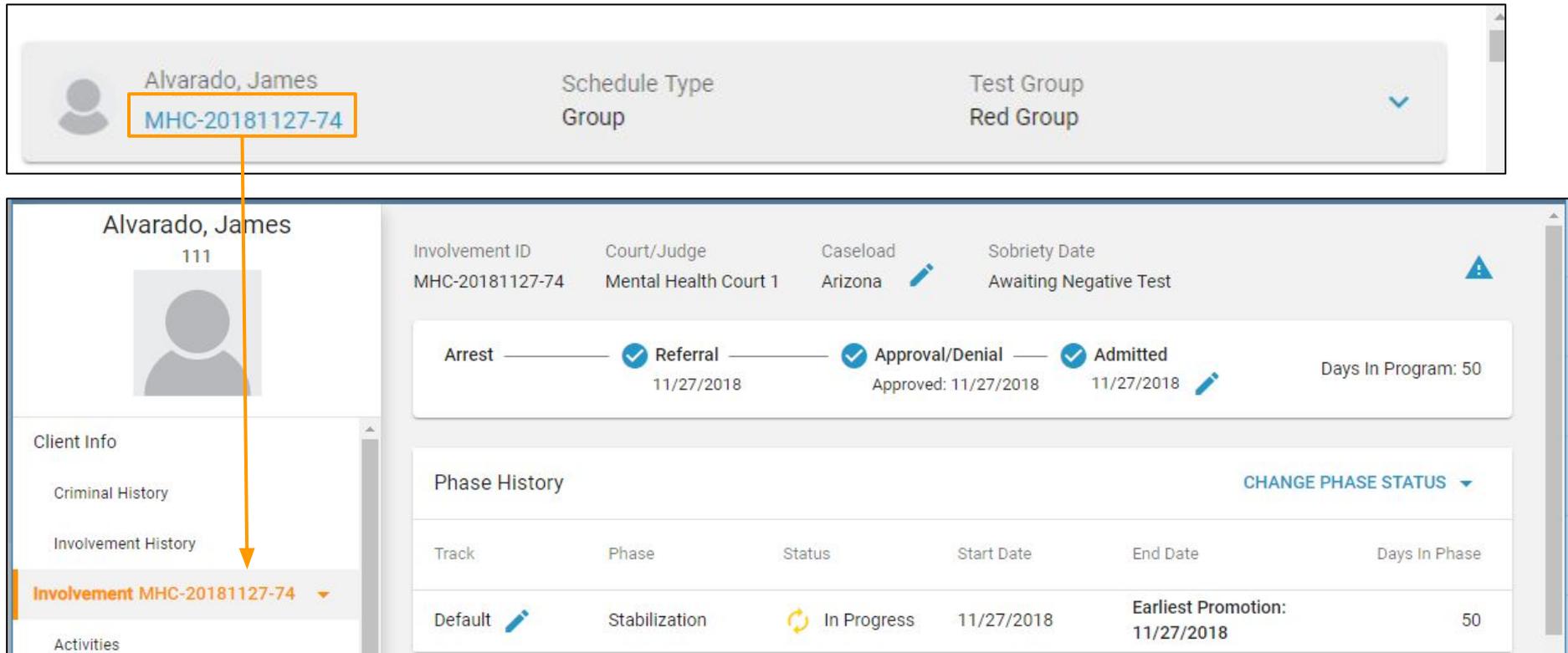
Caseload  
Multiple Selected

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.



The screenshot displays the client's involvement overview for James Alvarado. The top header shows the client's name, involvement ID (MHC-20181127-74), schedule type (Group), and test group (Red Group). The main content area includes a progress bar showing the client's status: Arrest, Referral (11/27/2018), Approval/Denial (Approved: 11/27/2018), and Admitted (11/27/2018). The phase history table shows the current phase is Stabilization, which is In Progress, starting on 11/27/2018, with an earliest promotion date of 11/27/2018 and 50 days in phase.

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

# 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		<a href="#">SCHEDULE INDIVIDUAL DRUG TEST</a>	<a href="#">SCHEDULE GROUP DRUG TEST</a>	
 Barrow, Thomas <a href="#">DUI-20161019-73</a>	Schedule Type By Group	Group Blue	▼	
 Conner, Alexis <a href="#">DUI-20161019-73</a>	Schedule Type By Group	Group Blue	▼	
 Lane, Constance <a href="#">DUI-20170228-33</a>	Schedule Type By Group	Group Blue	▼	
 Montoya, Art <a href="#">DUI-20161019-73</a>	Schedule Type By Group	Group Blue	▼	
 Phillips, Dan <a href="#">DC-20180226-1</a>	Schedule Type Individual		▼	
 Randall, Jack <a href="#">DUI-20161019-73</a>	Schedule Type By Group	Group Blue	▼	
 Sellers, Valerie	Schedule Type	Group		

 RESOLVE EXCEPTIONS (2)

Filters

Client

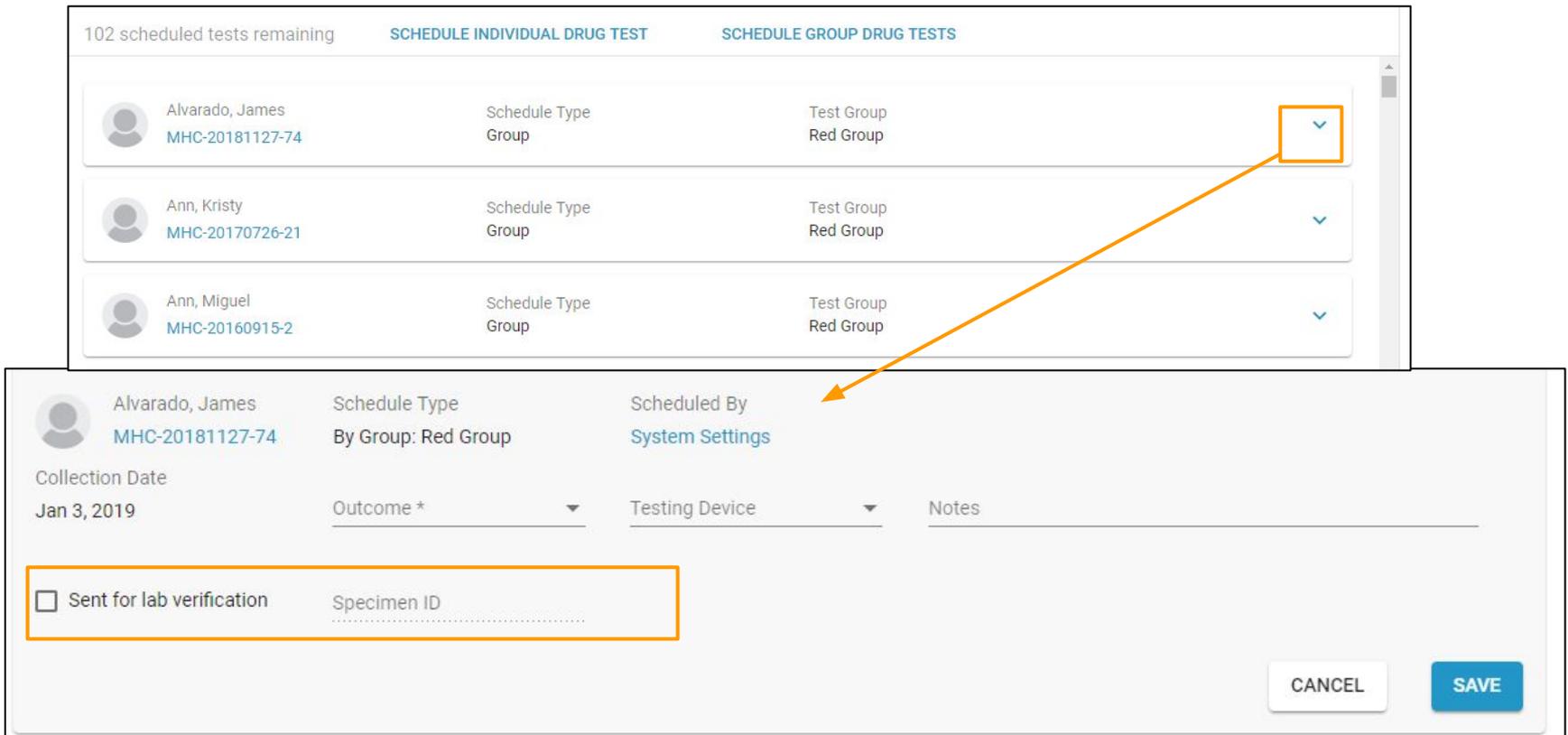
Caseload  
Multiple Selected ▼

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.



The screenshot displays the 'SCHEDULE DRUG TESTS' interface. At the top, it shows '102 scheduled tests remaining' and two buttons: 'SCHEDULE INDIVIDUAL DRUG TEST' and 'SCHEDULE GROUP DRUG TESTS'. Below this is a table of scheduled tests:

Client Name	MHC ID	Schedule Type	Test Group	Action
Alvarado, James	MHC-20181127-74	Group	Red Group	Expand
Ann, Kristy	MHC-20170726-21	Group	Red Group	Expand
Ann, Miguel	MHC-20160915-2	Group	Red Group	Expand

An orange box highlights the expand icon for James Alvarado's test, with an arrow pointing to the expanded view below. The expanded view shows the following details:

- Client:** Alvarado, James (MHC-20181127-74)
- Schedule Type:** By Group: Red Group
- Scheduled By:** System Settings
- Collection Date:** Jan 3, 2019
- Outcome:** \* (dropdown menu)
- Testing Device:** (dropdown menu)
- Notes:** (text input field)
- Form Fields:**  Sent for lab verification and Specimen ID (text input field)
- Buttons:** CANCEL and 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

Collection Date  
08/05/2018

Lab Result Date \*  
1/15/2019

Schedule Type  
By Group: Red Group

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

Lab Outcome \*

Scheduled By  
System Settings

Notes  
[+](#)

Specimen ID  
23AB332C-E0D6-47B6-B

Notes

**Lab Result Details**

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

[+ Add Another Result](#)

**Documents**

Drop files here or click to upload

# 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](#)

Collection Date: 04/16/2018

Verified Outcome \* ▼

Initial Outcome: **Positive for THC**

[View Clients Prescription List](#)

Schedule Type: By Group: Blue

Scheduled By: [System Settings](#)

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

**Prescriptions**

One or more of these prescriptions could conflict with drug testing

[ADD PRESCRIPTION](#)

Prescription	Dosage	Notes
Lexapro	10 mg per day	<a href="#">+</a>
Lunesta	2 mg per day	<a href="#">+</a>

# 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						
<b>Insurance Information</b>													
Eligible for Medicaid	Health Insurance Provider	Policy Number	Last Medical Exam Date										
Yes	Aetna	4547575335AW4	08/16/2018										
<b>Diagnoses</b>													
Diagnosed with Substance Use Disorder		Diagnosed with Mental Illness											
Yes		Not Available											
Communicable Diseases				Allergies									
Not Available				Not Available									
<b>Pregnancy</b>													
Currently Pregnant													
Not Available													
<b>Prescriptions</b>					<input checked="" type="checkbox"/> One or more of these prescriptions could conflict with drug testing results								
<a href="#">ADD PRESCRIPTION</a>													
<table border="1"> <thead> <tr> <th>Prescription</th> <th>Dosage</th> <th>Comments</th> </tr> </thead> <tbody> <tr> <td>Ambien</td> <td>1 mg per month</td> <td></td> </tr> </tbody> </table>								Prescription	Dosage	Comments	Ambien	1 mg per month	
Prescription	Dosage	Comments											
Ambien	1 mg per month												

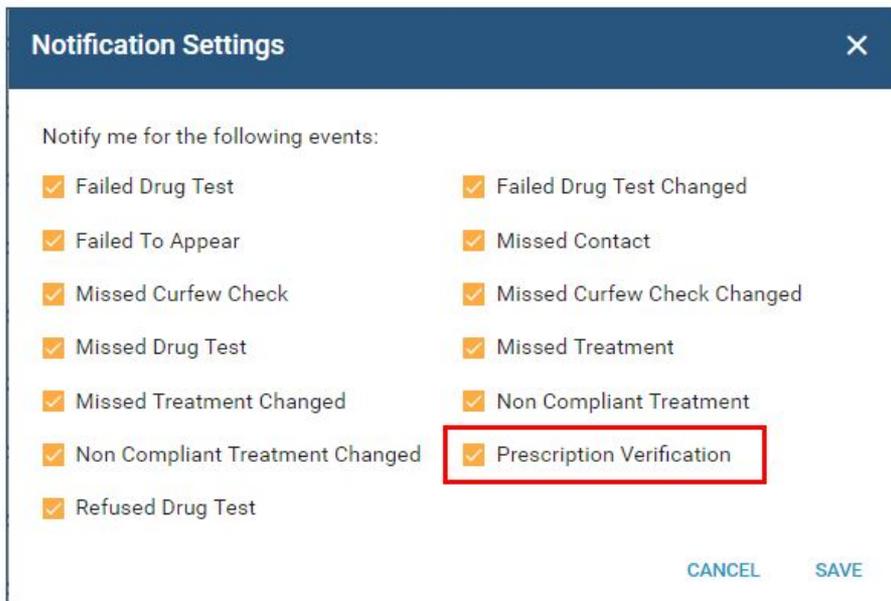
# DRUG TESTING - PENDING PRESCRIPTION VERIFICATION

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 screenshot shows a "Notification Settings" dialog box with a close button (X) in the top right corner. Below the title bar, it says "Notify me for the following events:". There are two columns of notification options, each with a checked checkbox:

<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	

At the bottom right of the dialog box, there are two buttons: "CANCEL" and "SAVE". The "Prescription Verification" checkbox is highlighted with a red rectangular border.

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 <a href="#">MHC-20181127-74</a>	Final Outcome Adulterated	Schedule Type By Group: Red Group	Scheduled By <a href="#">System Settings</a>	 
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			
<b>Lab Result Details</b>					
There are no results for this drug test					
<b>Documents</b>					
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
<p> Add Another Result</p>						

**Documents**

Drop files here or click to upload



# 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
**! RESOLVE EXCEPTIONS (2)**

Collection Date: April 16, 2018 
Filters

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

Exception Popout - Google Chrome

https://f8ug25.axshare.com/exception\_popout.html

### Drug Testing Integration Exceptions

State of Louisiana > 11th JDC > Sabine > ADC

2 errors remaining

Exception ID	Lab ID	Exception Date	Client Identifier	Name	DOB	Involvement	Specimen ID	Attached Document
<input type="checkbox"/> 100001	123	11/15/2018	<input type="text" value=""/> <sup>3</sup> 	Walters, Jane	04/26/1993	Not Available	235269	LabResult235269.pdf 
<input type="checkbox"/> 100002	123	11/15/2018	2654523	Ventura, Sal	12/26/1972	<input type="text" value=""/> <sup>1</sup> 	235325	LabResult235325.pdf  certification.pdf 

## Subtopics:

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

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

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 +

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

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		

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"/>	 <a href="#">Class, Edgar</a>	DC-20170719-1	Oct 5, 2017	4:30pm to 4:30pm	Pending	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
<input type="checkbox"/>	 <a href="#">Harvey, Derek</a>	DC-20170613-2	Oct 5, 2017	4:30pm to 4:30pm	Pending	
<input type="checkbox"/>	 <a href="#">Stark, Sansa</a>	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	<input checked="" type="checkbox"/> ✓ <input type="checkbox"/>
<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	<b>Absence</b> - 1st Offense - Miss meeting/fail to have proof of a support group meeting.
<input type="checkbox"/> Electronic monitoring	<b>Failure To Appear</b> - Failure to appear in court.
<input type="checkbox"/> Apology Letter	<b>Absence</b> - Have defendant write an apology letter for being absent.
<input type="checkbox"/> Reprimand	<b>Absence</b> - 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

## 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

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 checked="" type="checkbox"/>	<b>Conner, Alexis</b> <a href="#">DUJ-20161019-73</a>	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"/>	<b>Phillips, Dan</b> <a href="#">DUJ-20180226-1</a>	1	06/02/2018	203 N Sesame St. Scottsdale, AZ 85251	8:00 pm - 5:00 am	Not Checked	Time	Notes
<input type="checkbox"/>	<b>Sellers, Valerie</b> <a href="#">DC-20161019-73</a>	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"/>	<b>Conner, Alexis</b> <a href="#">DUJ-20161019-73</a>	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"/>	<b>Phillips, Dan</b> <a href="#">DUJ-20180226-1</a>	1	06/02/2018	203 N Sesame St. Scottsdale, AZ 85251	8:00 pm - 5:00 am	Not Checked	Time	Notes
<input type="checkbox"/>	<b>Sellers, Valerie</b> <a href="#">DC-20161019-73</a>	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 checked="" type="checkbox"/>	 <b>Conner, Alexis</b> <a href="#">DCJ-20161019-73</a>	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"/>	 <b>Phillips, Dan</b> <a href="#">DCJ-20180226-1</a>	1	06/02/2018	203 N Sesame St. Scottsdale, AZ 85251	8:00 pm - 5:00 am	<input type="text" value="Not Checked"/>	<input type="text" value="Time"/> 	<input type="text" value="Notes"/>
<input type="checkbox"/>	 <b>Sellers, Valerie</b> <a href="#">DC-20161019-73</a>	1	06/02/2018	5365 E Evergreen Terrace Scottsdale, AZ 85251	11:00 pm - 5:00 am	<input type="text" value="Not Checked"/> ▼	<input type="text" value="Time"/> 	<input type="text" value="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	Precinct	Client			
		All	Arcadia Biltmore	All			
Client	Checks Per Week	Last Check Date	Address/Phone	Curfew	Status	Time Checked	Notes
 <b>Conner, Alexis</b> 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		
 <b>Phillips, Dan</b> 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"/>	 <b>Conner, Alexis</b> <a href="#">DUJ-20161019-73</a>	2	06/07/2018	123 E Maint St. Scottsdale, AZ 85251	8:00 pm - 5:00 am	Compliant	8:15 PM	 (1) <div style="border: 1px solid #ccc; padding: 2px; float: right; margin-left: 5px;"></div>
<input type="checkbox"/>	 <b>Phillips, Dan</b> <a href="#">DUJ-20180226-1</a>	1	06/02/2018	203 N Sesame St. Scottsdale, AZ 85251	8:00 pm - 5:00 am	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">Not Checked</div> <div style="margin-left: 10px;">Time </div> <div style="margin-left: 10px;">Notes</div>		
<input type="checkbox"/>	 <b>Sellers, Valerie</b> <a href="#">DC-20161019-73</a>	1	06/02/2018	5365 E Evergreen Terrace Scottsdale, AZ 85251	11:00 pm - 5:00 am	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">Not Checked</div> <div style="margin-left: 10px;">Time </div> <div style="margin-left: 10px;">Notes</div>		

**Filters**

Client Involvement



Caseload

- Default
- Community Service

Precinct

- Arcadia Biltmore
- Desert Ridge
- McDowell Mountain

## 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 \*  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 \*

Session Type \*

Session Length \*

 hours

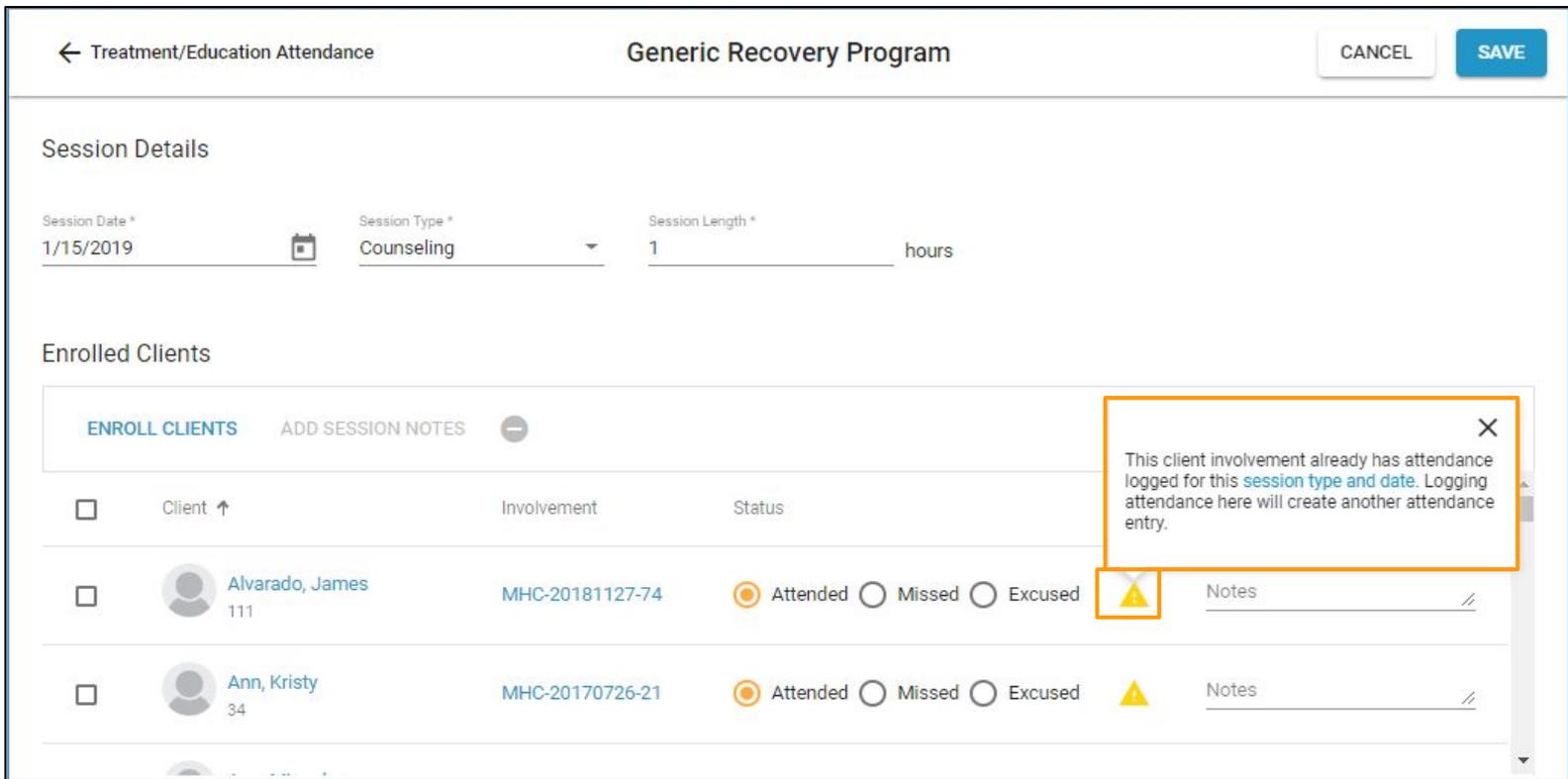
**Enrolled Clients**

ENROLL CLIENTS ADD SESSION NOTES ⊖

	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" value="Notes"/>
<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" value="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.

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.

← Treatment/Education Attendance Generic Recovery Program CANCEL SAVE

---

Session Details

Session Date \*   Session Type \*  Session Length \*  hours

Enrolled Clients

**ENROLL CLIENTS** ADD SESSION NOTES

**Enroll Clients**

Client Involvements... \*

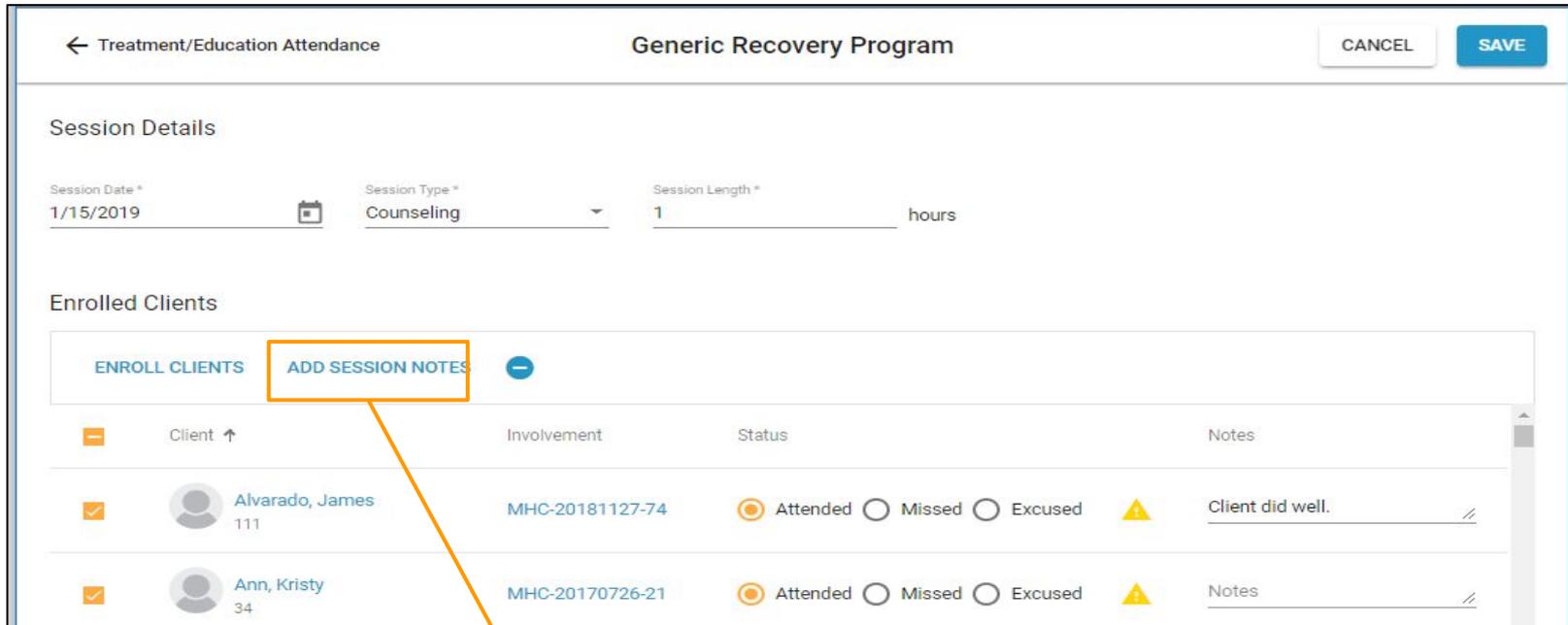
---

Start Date

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

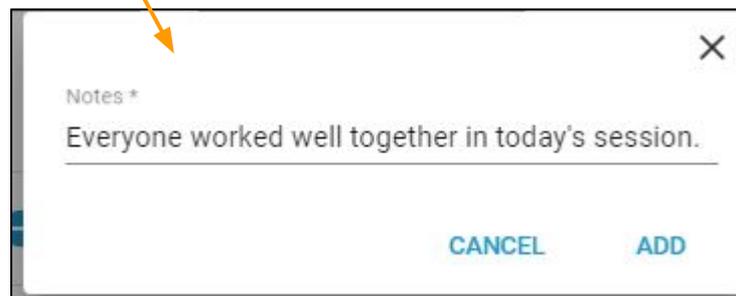
Session Details

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	<input type="checkbox"/> <input checked="" type="checkbox"/> 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	<input type="checkbox"/> <input checked="" type="checkbox"/> Notes



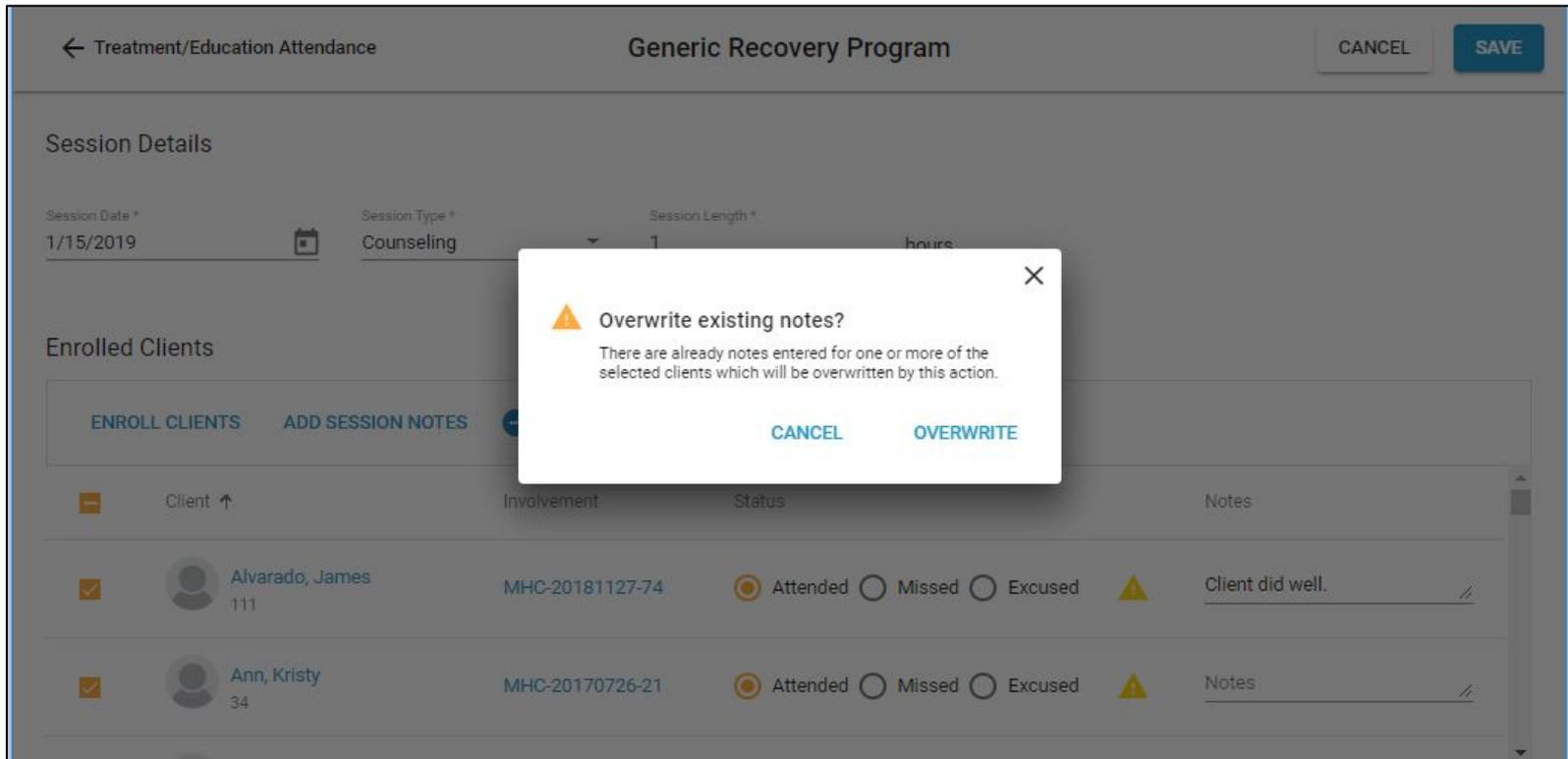
Notes \*

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 'Generic Recovery Program' interface. At the top, there is a navigation bar with a back arrow, the text 'Treatment/Education Attendance', the program name 'Generic Recovery Program', and 'CANCEL' and 'SAVE' buttons. Below this is the 'Session Details' section, which includes fields for 'Session Date \*' (1/15/2019), 'Session Type \*' (Counseling), and 'Session Length \*' (1 hours). The 'Enrolled Clients' section is visible below, featuring buttons for 'ENROLL CLIENTS' and 'ADD SESSION NOTES'. A modal dialog box is overlaid on the screen, titled 'Overwrite existing notes?' with a warning icon. The dialog text reads: '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, a table of enrolled clients is partially visible, showing columns for Client, Involvement, Status, and Notes. Two clients are listed: Alvarado, James (111) and Ann, Kristy (34). Both have 'Attended' status and a yellow warning icon in the Notes column.

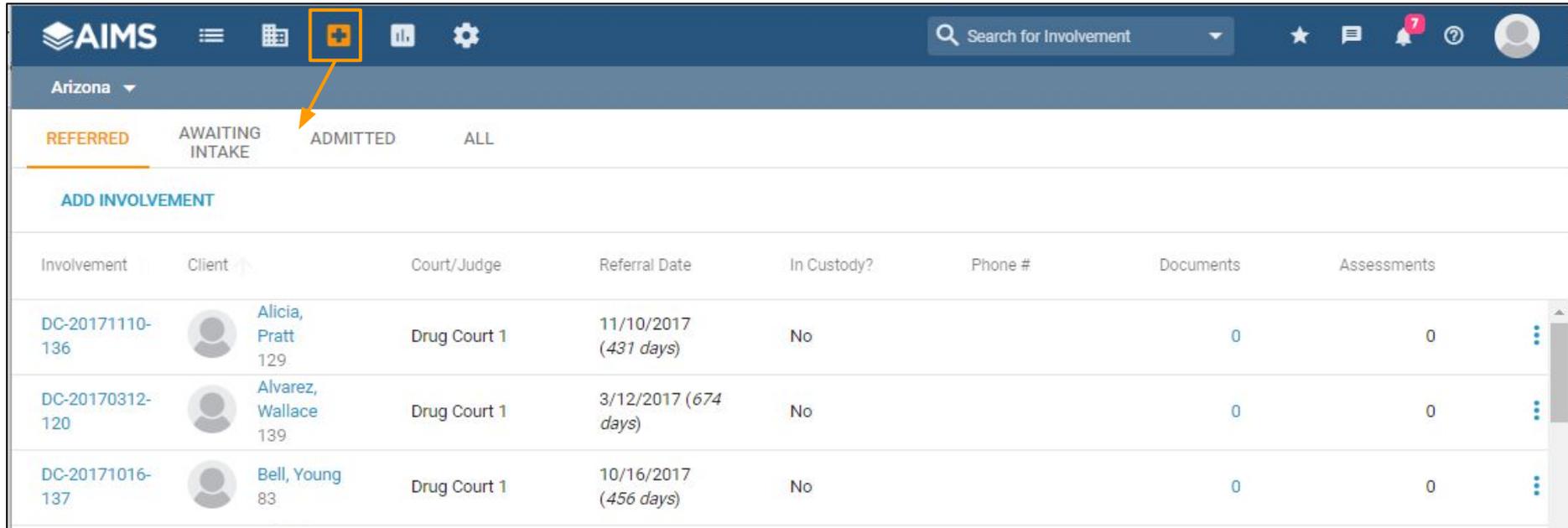
Client	Involvement	Status	Notes
Alvarado, James 111	MHC-20181127-74	<input checked="" type="radio"/> Attended <input type="radio"/> Missed <input type="radio"/> Excused	Client did well.
Ann, Kristy 34	MHC-20170726-21	<input checked="" type="radio"/> Attended <input type="radio"/> Missed <input type="radio"/>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

## 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.



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.

<span style="border: 1px solid orange; padding: 2px;">REFERRED</span> <span style="margin-left: 20px;">AWAITING INTAKE</span> <span style="margin-left: 20px;">ADMITTED</span> <span style="margin-left: 20px;">ALL</span>							
<a href="#">ADD INVOLVEMENT</a>							
Involvement	Client	Court/Judge	Referral Date	In Custody?	Phone #	Documents	Assessments
DC-20171110-136	 <a href="#">Alicia, Pratt</a> 129	Drug Court 1	11/10/2017 (431 days)	No		0	0 <span style="float: right; border: 1px solid orange; padding: 2px;">⋮</span>
DC-20170312-120	 <a href="#">Alvarez, Wallace</a> 139	Drug Court 1	3/12/2017 (674 days)	No		0	0
DC-20171016-137	 <a href="#">Bell, Young</a> 83	Drug Court 1	10/16/2017 (456 days)	No		0	0
DC-20180609-134	 <a href="#">Christie, Pratt</a> 146	Drug Court 1	6/9/2018 (220 days)	No		0	0 <span style="float: right;">⋮</span>

- 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	 <b>Allen, Francis</b> 47	Drug Court 1	08/04/2016		01/15/2019 10:49PM		
DC-20181215-149	 <b>Bryant, Murray</b> 140	Drug Court 1	12/15/2018		01/21/2019 6:00AM	<div style="border: 1px solid gray; padding: 5px; width: 150px;">  Schedule Intake   Complete Intake   Terminate         </div>	
DC-20180722-145	 <b>Devin, Lawson</b> 98	Drug Court 1	07/22/2018		01/16/2019 1:00AM		
DC-20170725-150	 <b>Jason, Cecilia</b> 134	Drug Court 1	07/25/2017		01/17/2019 11:36PM		
DC-20181127-143	 <b>Jerald, Padilla</b>	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	St	 Suspend	
MHC-20170726-21	 Ann, Kristy 34	Mental Health Court 1	Arizona-1-Caseload-2	07/26/2017	Default	St	 Terminate	
MHC-20160915-2	 Ann, Miguel	Mental Health Court 1	Arizona-1-Caseload-2	09/15/2016	Default	Stabilization		

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.

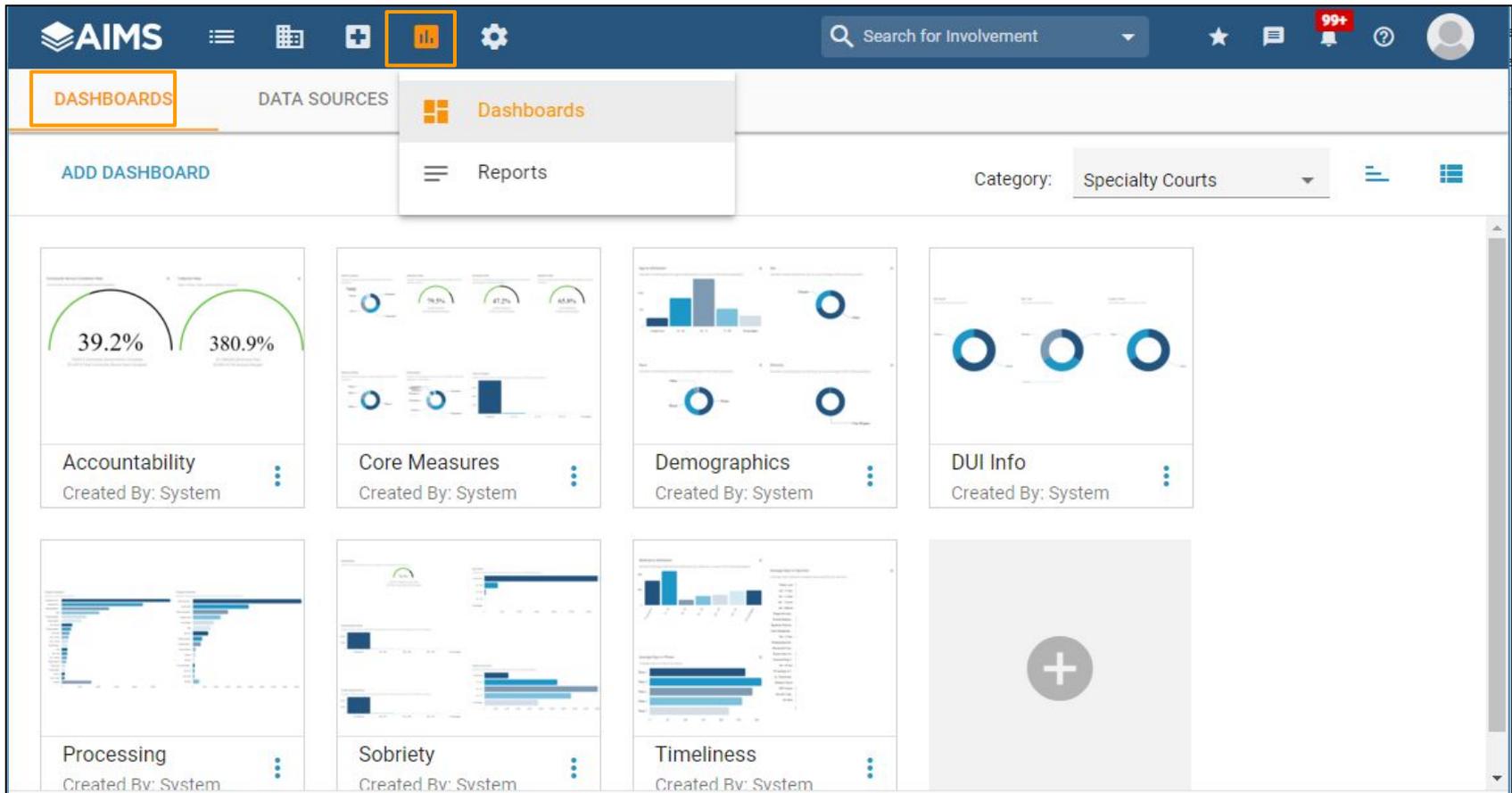
REFERRED	AWAITING INTAKE	ADMITTED	<b>ALL</b>			
<a href="#">ADD INVOLVEMENT</a>						
Involvement	Client ↑	Court/Judge	Caseload	Status	Status Date	
MHC-20180501-64	 <b>Monica, Sheri</b> 26	Mental Health Court 1	Arizona	Admitted	05/01/2018	⋮
MHC-20170327-87	 <b>Montgomery, Jacquelyn</b> 80	Mental Health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

## Subtopics:

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

# REPORTING - DASHBOARDS

To view Dashboards and Reports, click on the *Reporting* icon. Within the Speciality 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.



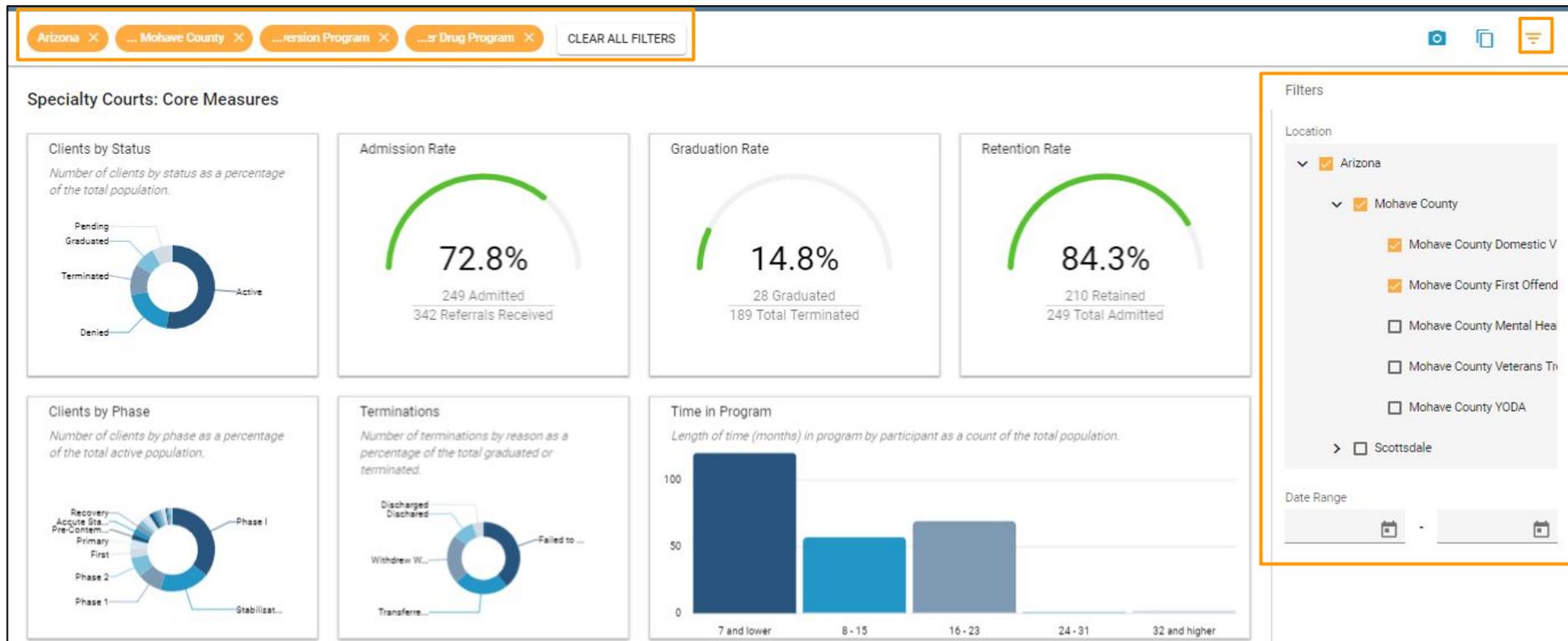
The screenshot displays the AIMS Reporting Dashboards interface. The top navigation bar includes the AIMS logo, a search bar for involvement, and a notification bell showing 99+ alerts. The main navigation menu is open, highlighting 'Dashboards' and 'Reports'. The 'Dashboards' section is selected, showing a grid of dashboard cards for the 'Specialty Courts' category. The visible dashboard cards are:

- Accountability**: Created By: System. Displays two gauges with values 39.2% and 380.9%.
- Core Measures**: Created By: System. Displays four gauges with values 76.5%, 47.2%, and 65.8%.
- Demographics**: Created By: System. Displays a bar chart and two gauges.
- DUI Info**: Created By: System. Displays three gauges.
- Processing**: Created By: System. Displays a horizontal bar chart.
- Sobriety**: Created By: System. Displays a bar chart and a gauge.
- Timeliness**: Created By: System. Displays a bar chart and a gauge.

A large grey button with a plus sign is located at the bottom right of the dashboard grid, indicating an option to add a new dashboard.

# 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.

DASHBOARDS		DATA SOURCES		
				Category: <span>Specialty Courts</span> 
<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		
			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	<b>202</b>	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 \*

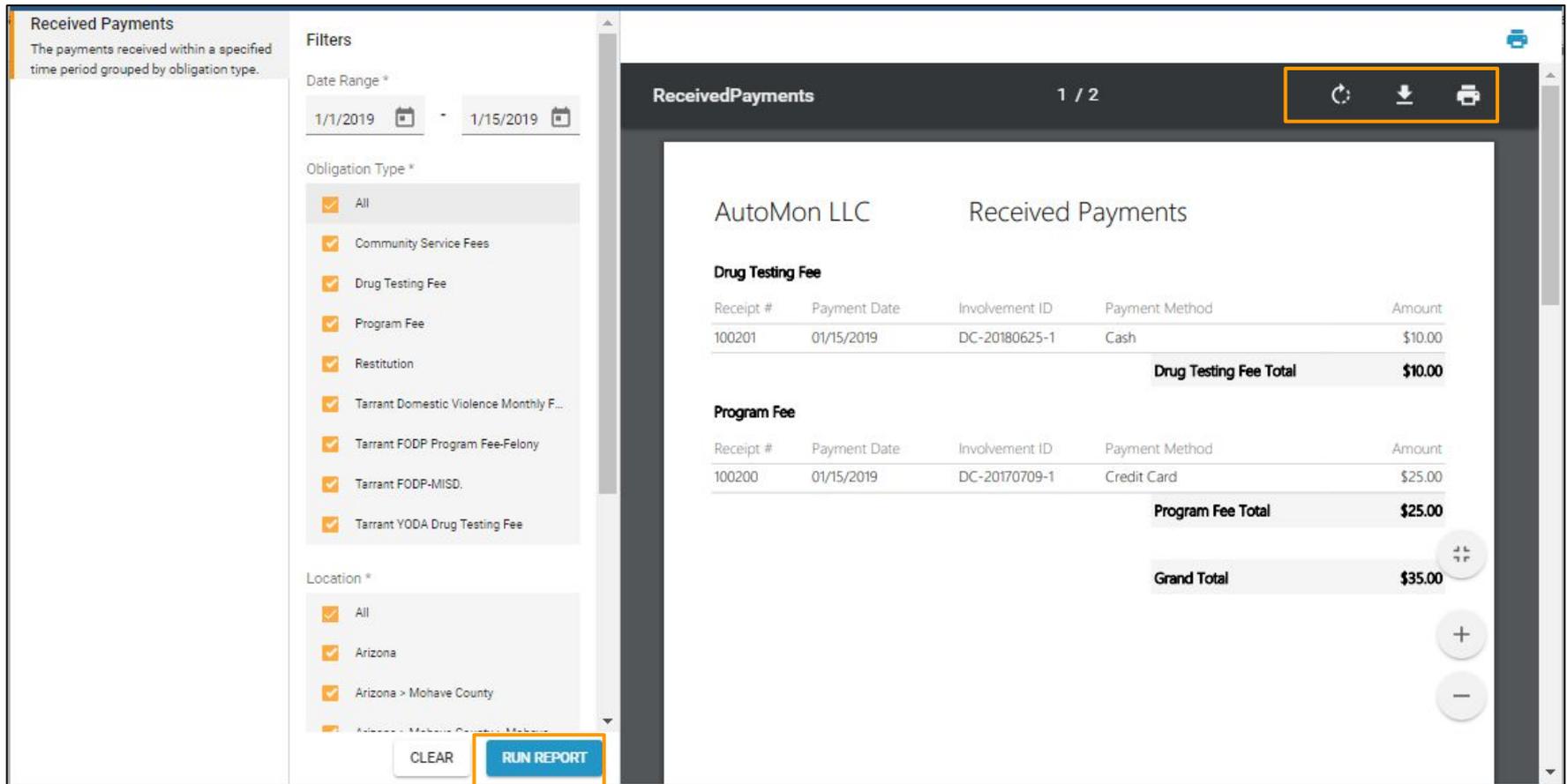
- All
- Arizona
- Arizona > Mohave County
- Arizona > Mohave County > Mohave

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

**Received Payments** 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
<b>Drug Testing Fee Total</b>				<b>\$10.00</b>

**Program Fee**

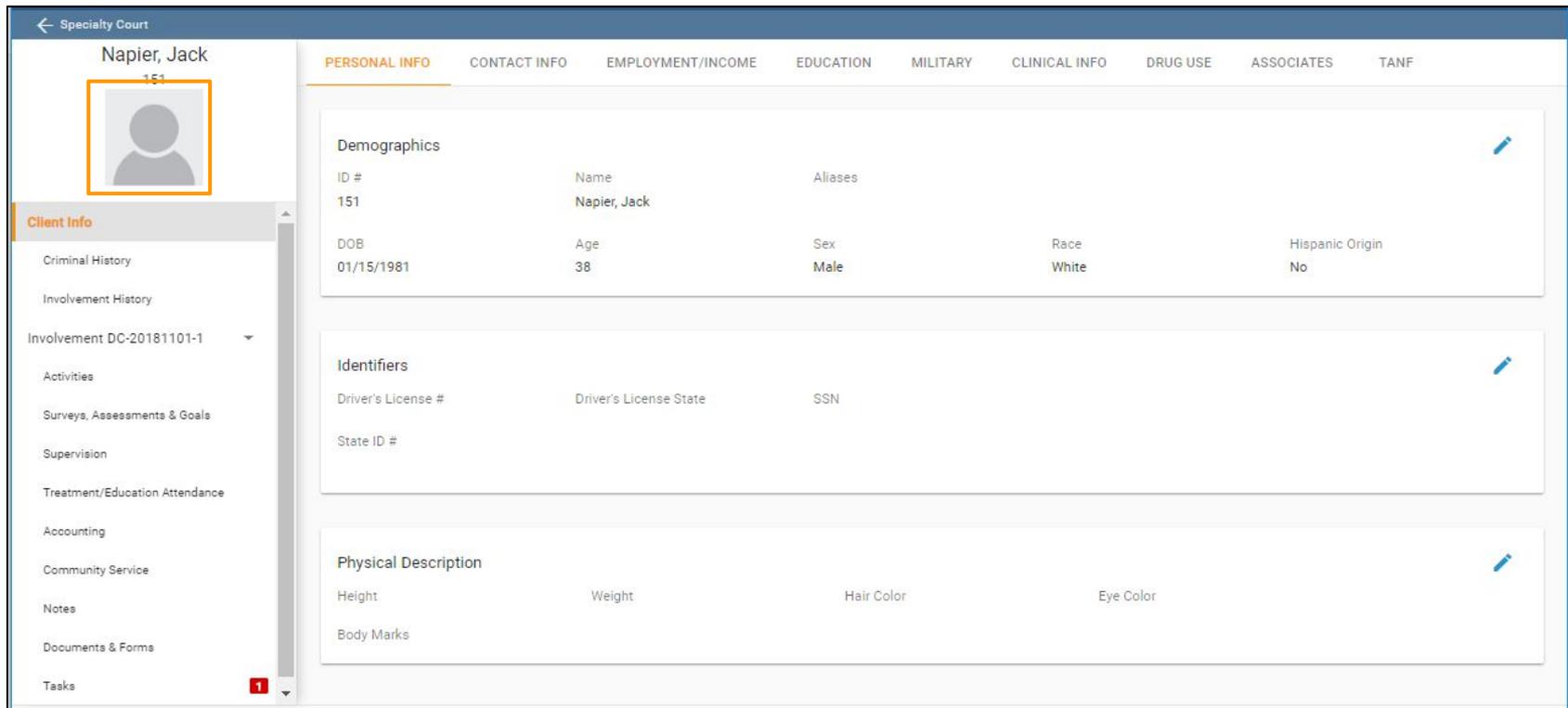
Receipt #	Payment Date	Involvement ID	Payment Method	Amount
100200	01/15/2019	DC-20170709-1	Credit Card	\$25.00
<b>Program Fee Total</b>				<b>\$25.00</b>
<b>Grand Total</b>				<b>\$35.00</b>

## 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  
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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**

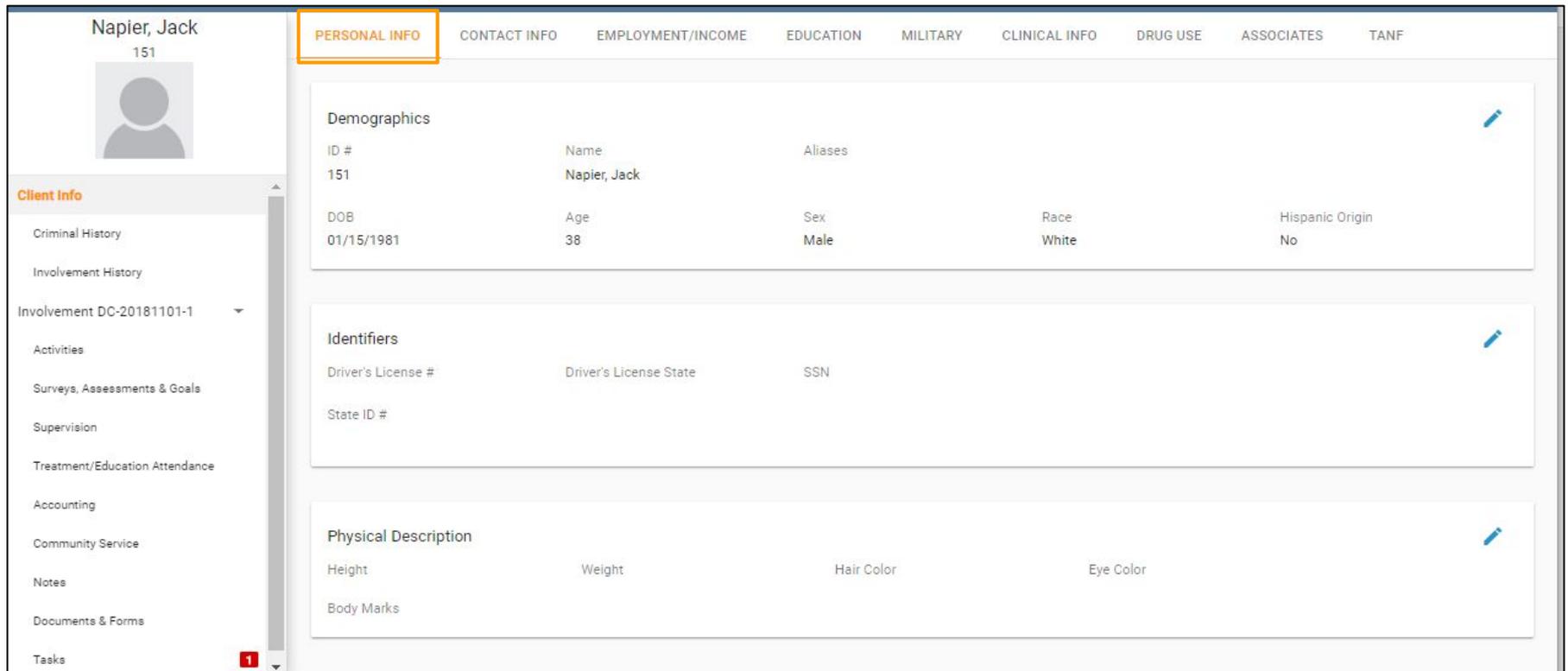
Driver's License #	Driver's License State	SSN
State ID #		

**Physical Description**

Height	Weight	Hair Color	Eye Color
Body Marks			

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

**Demographics** 

ID #	Name	Aliases	DOB	Age	Sex	Race	Hispanic Origin
151	Napier, Jack		01/15/1981	38	Male	White	No

**Identifiers** 

Driver's License #	Driver's License State	SSN	State ID #

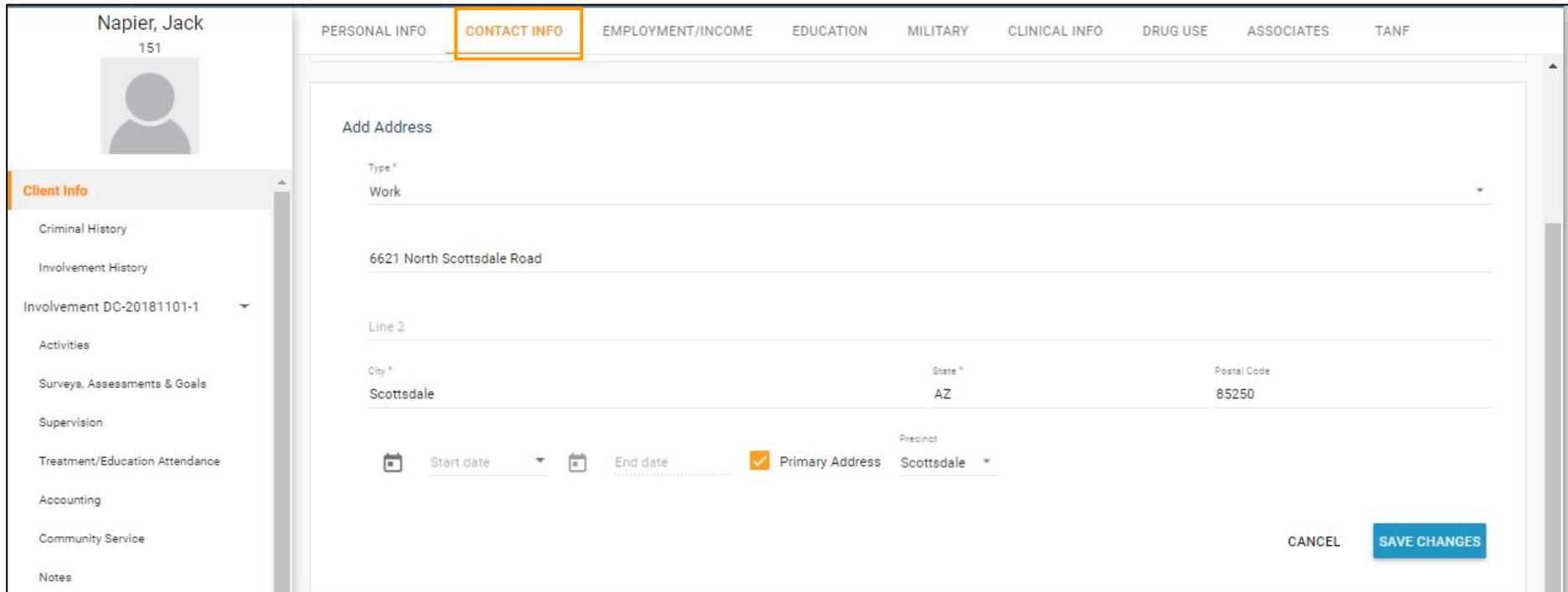
**Physical Description** 

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.



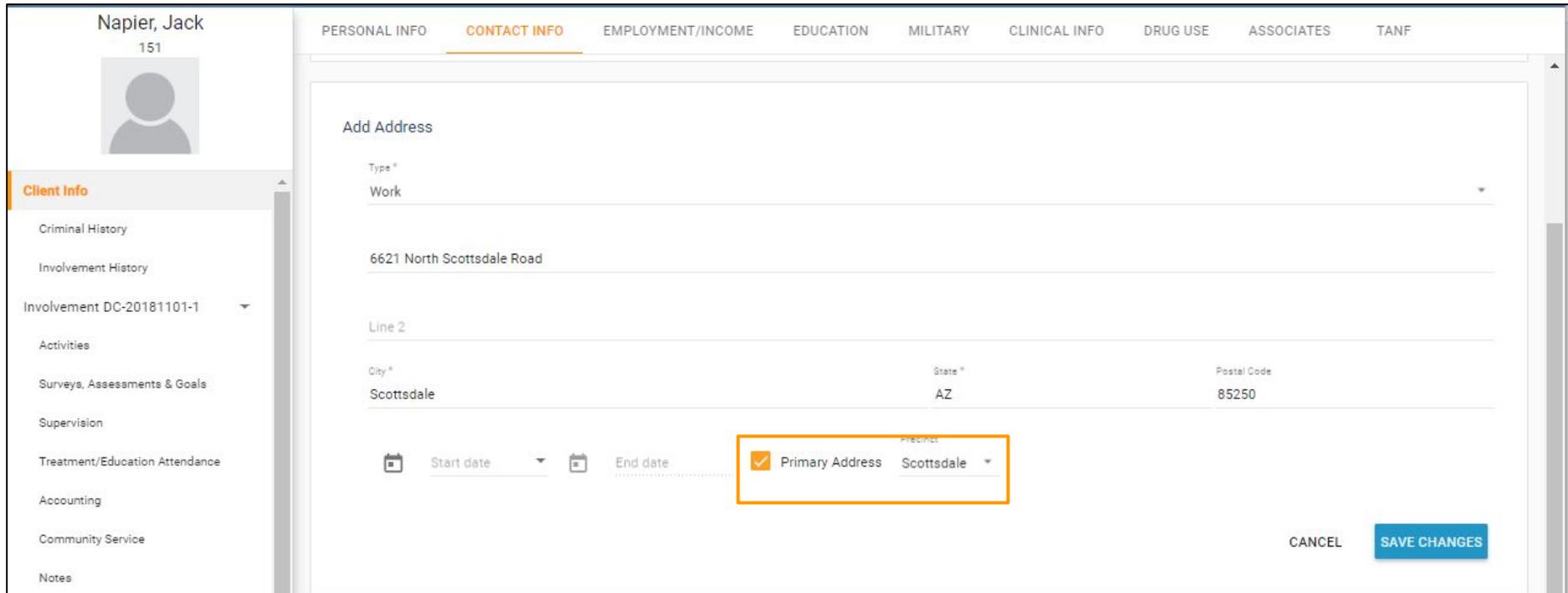
The screenshot displays the 'CONTACT INFO' tab for a client named Jack Napier (ID 151). The interface includes a navigation menu on the left with options like 'Criminal History', 'Involvement History', and 'Supervision'. The main content area shows the 'Add Address' form with the following fields:

- Type: Work
- Address Line 1: 6621 North Scottsdale Road
- Address Line 2: (empty)
- City: Scottsdale
- State: AZ
- Postal Code: 85250
- Start date: (calendar icon)
- End date: (calendar icon)
- Primary Address:
- Precinct: Scottsdale

Buttons for 'CANCEL' and 'SAVE CHANGES' are located at the bottom right of the form.

# 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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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 - 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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PERSONAL INFO

CONTACT INFO

EMPLOYMENT/INCOME

EDUCATION

MILITARY

CLINICAL INFO

DRUG USE

ASSOCIATES

TANF

**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

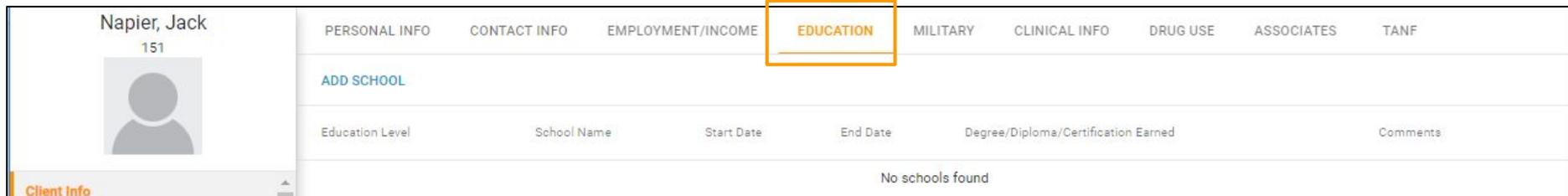
Income Source	Start Date	End Date	Monthly Income Amount	Comments
---------------	------------	----------	-----------------------	----------

**Client Info**

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

# 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

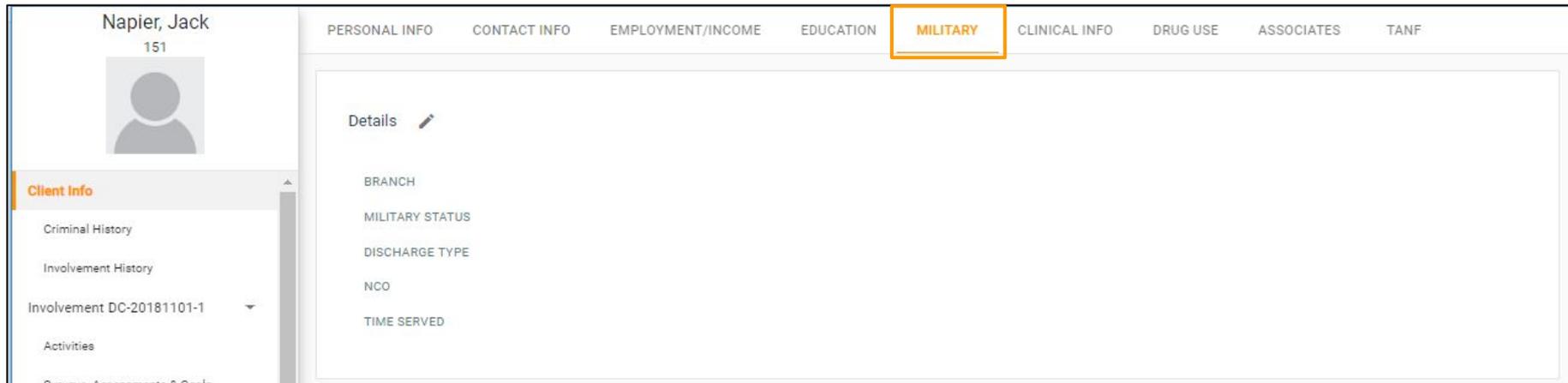
[ADD SCHOOL](#)

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.



# 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						
<div style="border: 1px solid #ccc; padding: 5px;"> <p><b>Insurance Information</b> <span style="float: right;">✎</span></p> <table border="0" style="width: 100%;"> <tr> <td style="width: 25%;">Eligible for Medicaid Not Available</td> <td style="width: 25%;">Health Insurance Provider Not Available</td> <td style="width: 25%;">Policy Number Not Available</td> <td style="width: 25%;">Last Medical Exam Date Not Available</td> </tr> </table> </div>									Eligible for Medicaid Not Available	Health Insurance Provider Not Available	Policy Number Not Available	Last Medical Exam Date Not Available		
Eligible for Medicaid Not Available	Health Insurance Provider Not Available	Policy Number Not Available	Last Medical Exam Date Not Available											
<div style="border: 1px solid #ccc; padding: 5px;"> <p><b>Diagnoses</b> <span style="float: right;">✎</span></p> <table border="0" style="width: 100%;"> <tr> <td style="width: 50%;">Diagnosed with Substance Use Disorder Not Available</td> <td style="width: 50%;">Diagnosed with Mental Illness Not Available</td> </tr> <tr> <td>Communicable Diseases Not Available</td> <td>Allergies Not Available</td> </tr> </table> </div>									Diagnosed with Substance Use Disorder Not Available	Diagnosed with Mental Illness Not Available	Communicable Diseases Not Available	Allergies Not Available		
Diagnosed with Substance Use Disorder Not Available	Diagnosed with Mental Illness Not Available													
Communicable Diseases Not Available	Allergies Not Available													
<div style="border: 1px solid #ccc; padding: 5px;"> <p><b>Pregnancy</b> <span style="float: right;">✎</span></p> <p>Currently Pregnant Not Available</p> </div>														
<div style="border: 1px solid #ccc; padding: 5px;"> <p><b>Prescriptions</b></p> <p><a href="#">ADD PRESCRIPTION</a></p> <div style="border: 2px solid orange; padding: 5px; display: inline-block;"> <input type="checkbox"/> One or more of these prescriptions could conflict with drug testing results         </div> <table border="0" style="width: 100%; margin-top: 10px;"> <thead> <tr> <th style="width: 60%;">Prescription</th> <th style="width: 20%;">Dosage</th> <th style="width: 20%;">Comments</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table> </div>									Prescription	Dosage	Comments			
Prescription	Dosage	Comments												

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	<b>DRUG USE</b>	ASSOCIATES	TANF
<b>Drug Use</b>								
Primary Drug of Choice		Secondary Drug of Choice		Age at Onset of Drug Use				
Not Available		Not Available		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

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.



The screenshot shows the 'TANF' tab selected in the client information section. The navigation bar includes: PERSONAL INFO, CONTACT INFO, EMPLOYMENT/INCOME, EDUCATION, MILITARY, CLINICAL INFO, DRUG USE, ASSOCIATES, and TANF. The TANF tab is highlighted with an orange border. Below the navigation bar, the 'TANF Details' section is visible, containing a table with the following data:

TANF Eligible	TANF Certification Date
Yes	01/01/2019

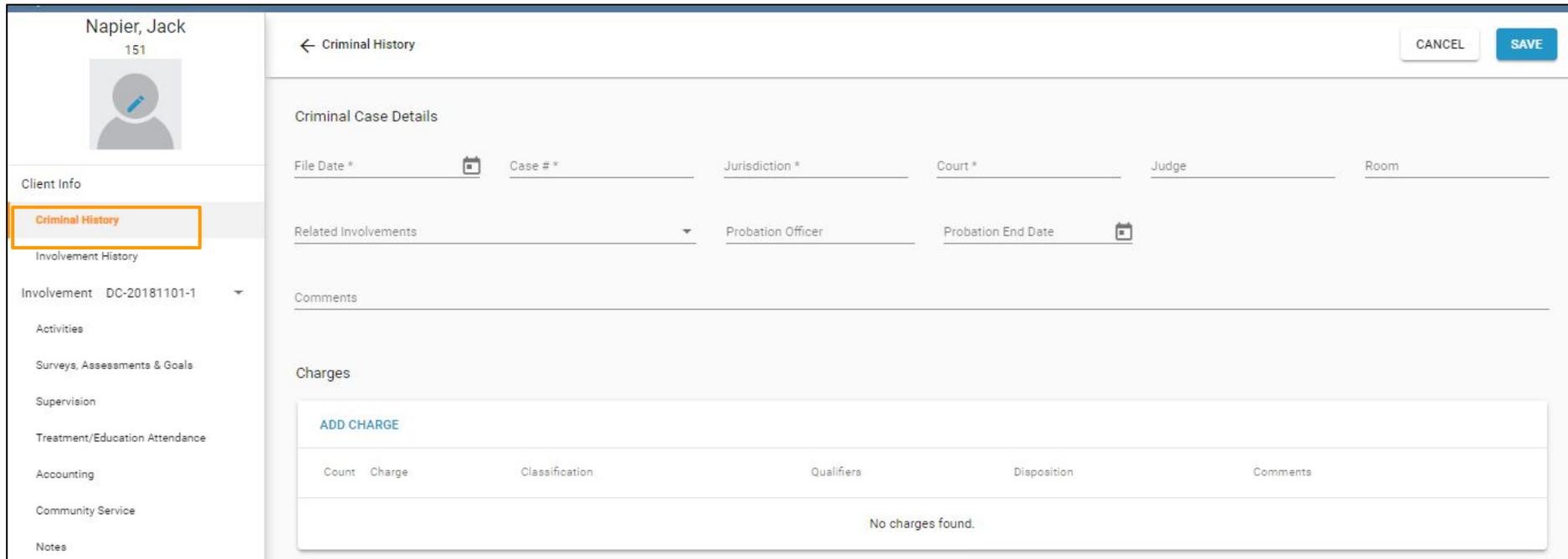
Below the table, there is a blue hyperlink labeled 'Dependent Children Information' which is also highlighted with an orange border. A blue pen icon is located in the top right corner of the TANF Details section, indicating that the data can be edited.

## 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).



The screenshot shows the 'Criminal History' page for a client named Jack Napier (ID 151). The left sidebar contains navigation options: Client Info, Criminal History (highlighted), Involvement History, Involvement (DC-20181101-1), Activities, Surveys, Assessments & Goals, Supervision, Treatment/Education Attendance, Accounting, Community Service, and Notes. The main content area is titled 'Criminal History' and includes a 'CANCEL' and 'SAVE' button. It features several input fields for 'Criminal Case Details': File Date \*, Case # \*, Jurisdiction \*, Court \*, Judge, and Room. Below these are 'Related Involvements' (a dropdown menu), Probation Officer, and Probation End Date (with a calendar icon). A 'Comments' section is also present. The 'Charges' section has an 'ADD CHARGE' button and a table with columns: Count, Charge, Classification, Qualifiers, Disposition, and Comments. The table currently displays 'No charges found.'

## 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

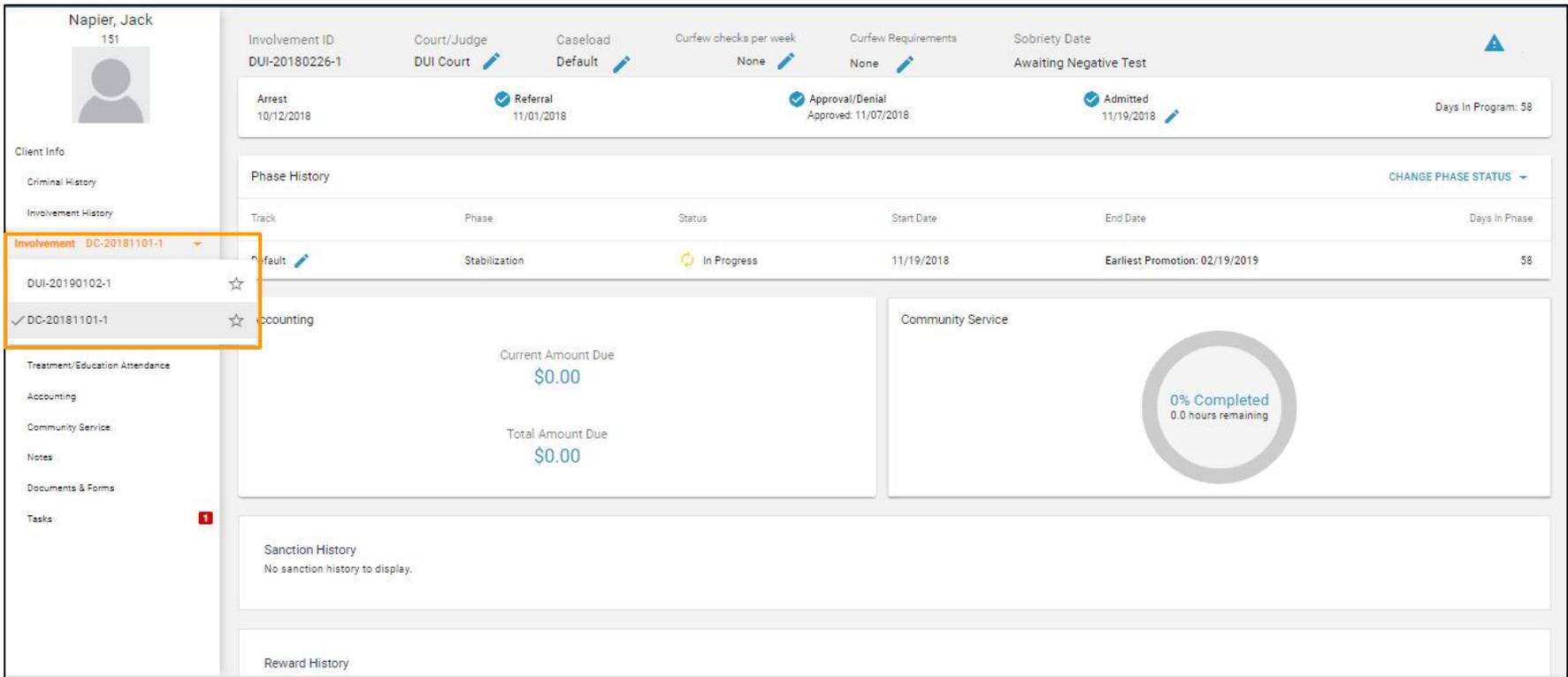
Involvement ID	Involvement Type	Opened	Closed
DC-20181101-1	Specialty Court	11/01/2018	

## 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.



**Napier, Jack**  
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**Client Info**

- Criminal History
- Involvement History
- Involvement DC-20181101-1** (Selected)
- DUI-20190102-1
- DC-20181101-1
- Treatment/Education Attendance
- Accounting
- Community Service
- Notes
- Documents & Forms
- Tasks

**Client Details:**

- 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 Summary:**

- Current Amount Due: \$0.00
- Total Amount Due: \$0.00

**Community Service:**

- 0% Completed
- 0.0 hours remaining

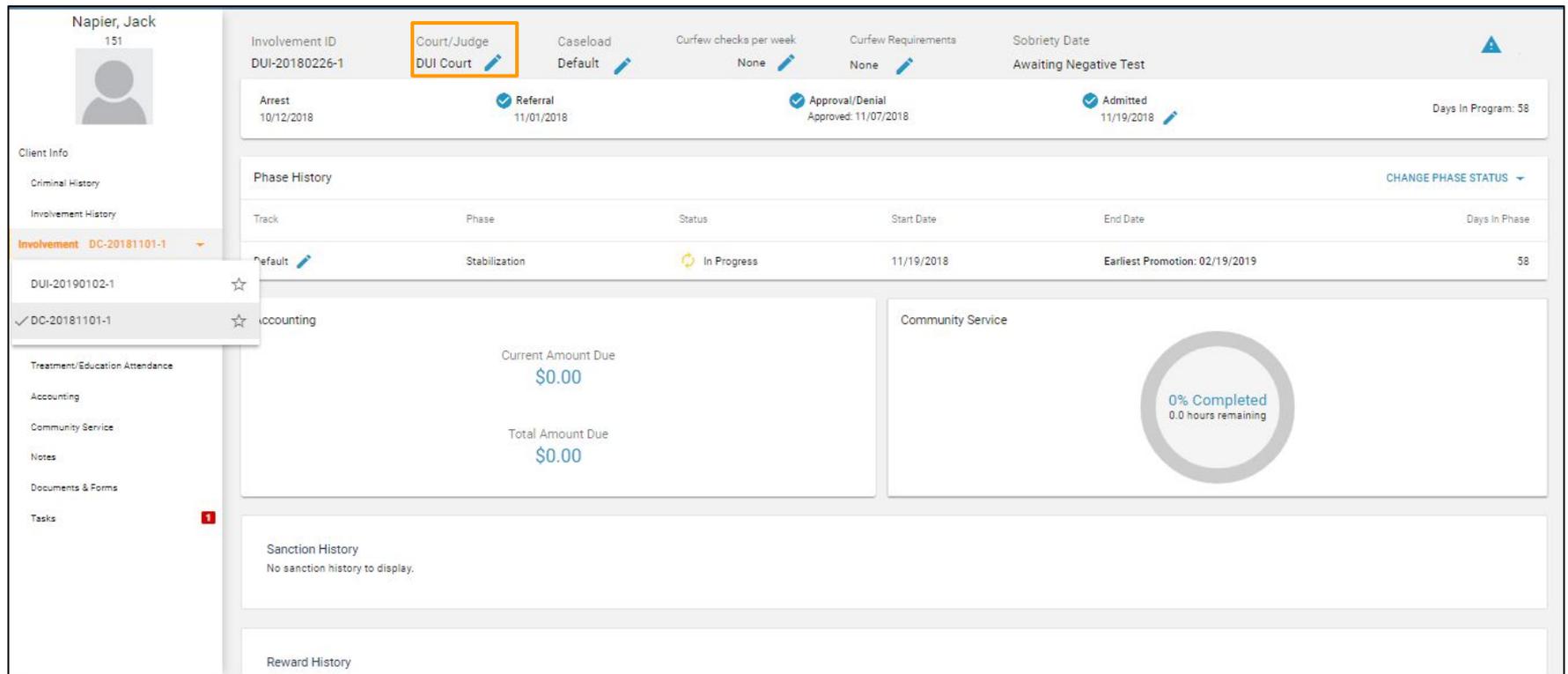
**Sanction History:**

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.**



**Client Info**  
Napier, Jack  
151

**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** 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

**Financials:**

- 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.

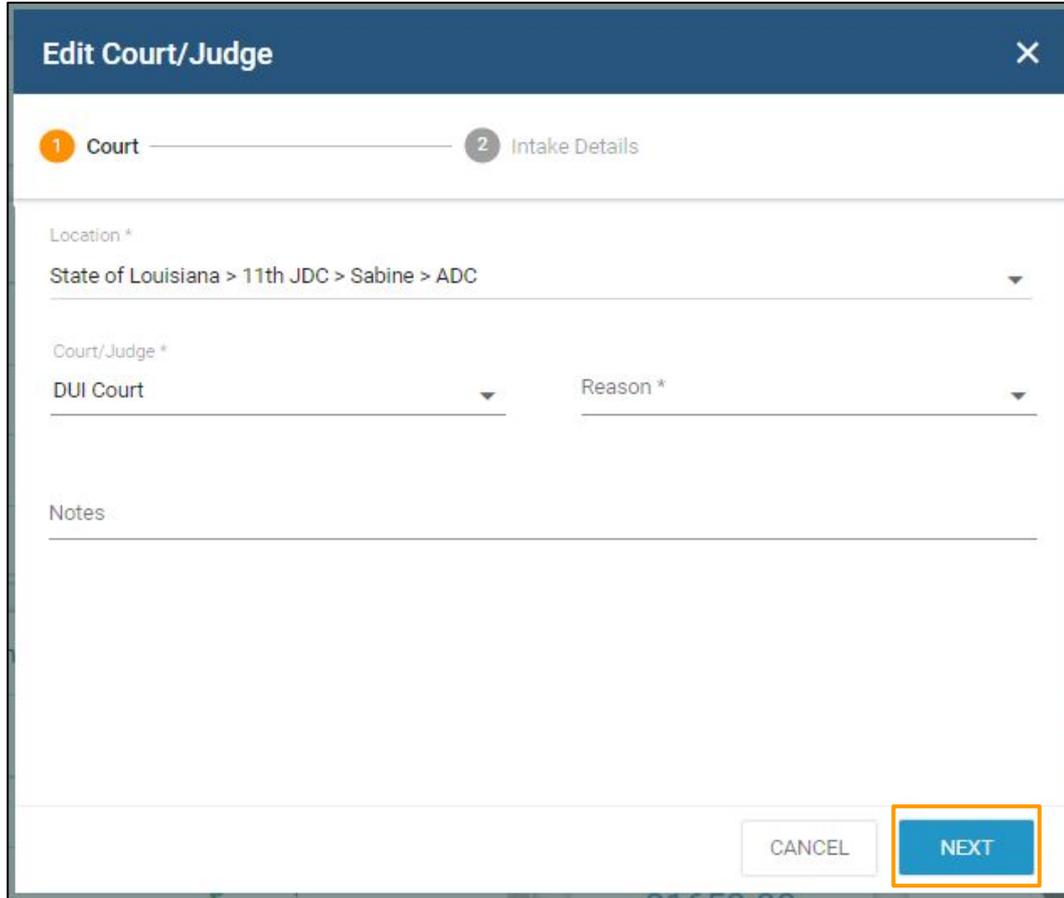
**Reward History:**

**Client Info Sidebar:**

- 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 1

# 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.



**Edit Court/Judge** [X]

1 Court ————— 2 Intake Details

Location \*  
State of Louisiana > 11th JDC > Sabine > ADC

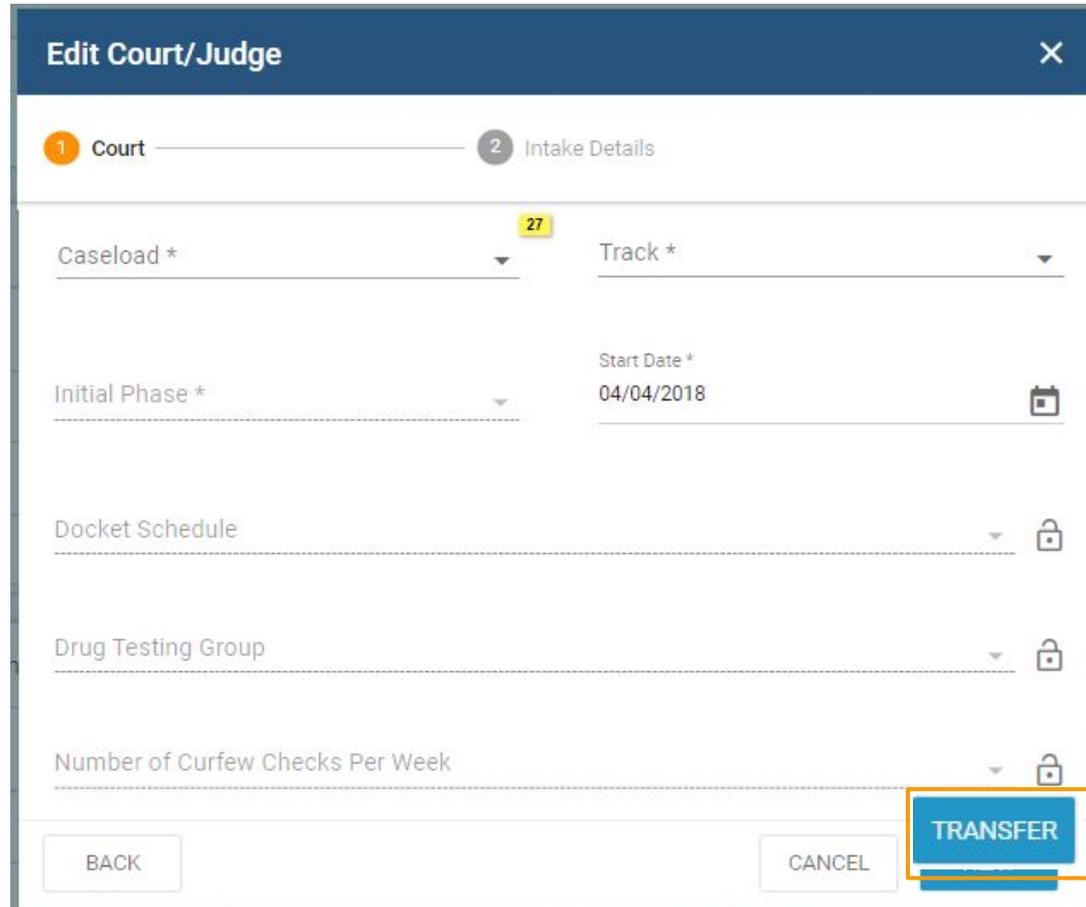
Court/Judge \*  
DUI Court Reason \*

Notes

CANCEL NEXT

# 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.



The screenshot shows a web form titled "Edit Court/Judge" with a close button (X) in the top right corner. The form is divided into two sections: "1 Court" and "2 Intake Details". The "Intake Details" section contains the following fields:

- Caseload \***: A dropdown menu with the value "27" highlighted in yellow.
- Track \***: A dropdown menu.
- Initial Phase \***: A dropdown menu.
- Start Date \***: A date field with the value "04/04/2018" and a calendar icon.
- Docket Schedule**: A dropdown menu with a lock icon.
- Drug Testing Group**: A dropdown menu with a lock icon.
- Number of Curfew Checks Per Week**: A dropdown menu with a lock icon.

At the bottom of the form, there are three buttons: "BACK", "CANCEL", and "TRANSFER". The "TRANSFER" button is highlighted with an orange border.

# 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						<a href="#">CHANGE PHASE STATUS</a> ▼
Track	Phase	Status	End Date	Days in Phase		
Default 	Phase 2	 In Prog			<b>Earliest Promotion: 04/30/2018</b>	24
Adult	Recovery	 Transferred Courts 	01/26/2018	02/19/2018		24
Adult	Stabilization	 Complete	01/12/2018	01/26/2018		14

**Transferred From** ✕

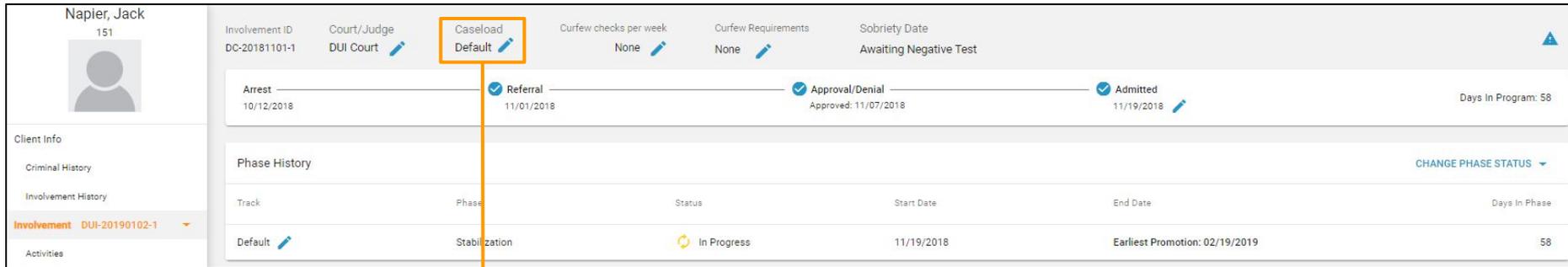
Court/Judge: DUI Court

Caseload: Default

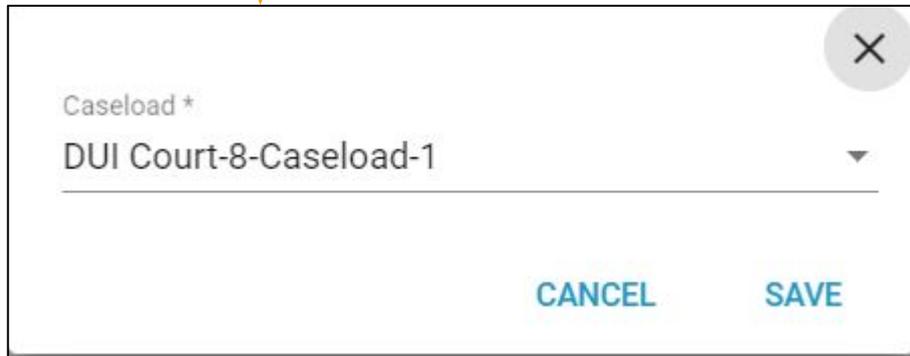
Reason: Client Moved  (1)

# 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.



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



Caseload \*

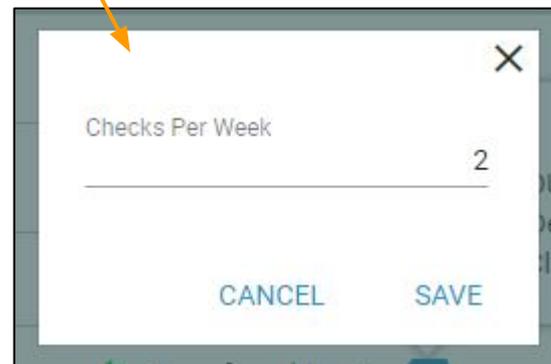
DUI Court-8-Caseload-1

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	Court/Judge	Caseload	Curfew checks per week	Curfew Requirements	Sobriety Date
DC-20181101-1	DUI Court 	Default 	None 	None 	Awaiting Negative Test
<b>Arrest</b> 10/12/2018	<input checked="" type="checkbox"/> <b>Referral</b> 11/01/2018			<input checked="" type="checkbox"/> <b>Approval/Denial</b> Approved: 11/07/2018	
<b>Phase History</b>					
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 	<b>Curfew Requirements</b> 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			
<b>Phase History</b>					
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

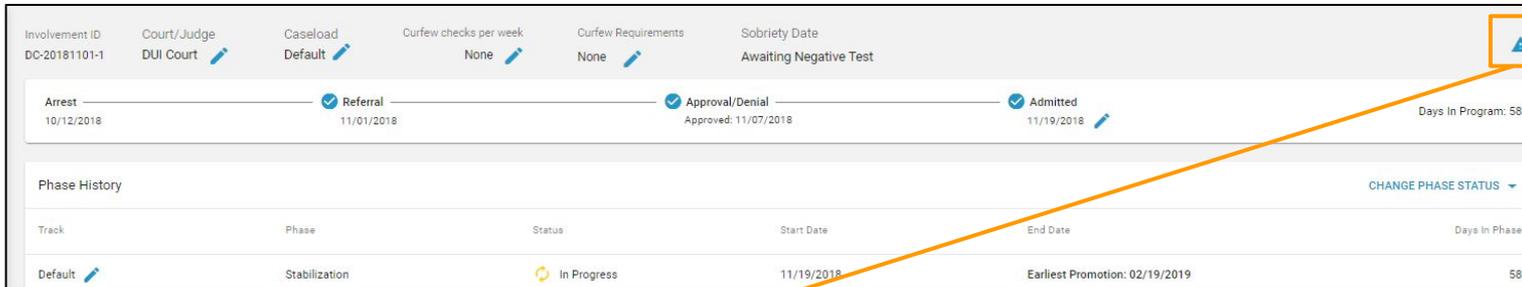
End Time  -

[+ 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  
 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



**Warning Editor**

Notify PO when client has entered the last phase | 251 of 300 remaining

CANCEL SAVE CHANGES



**NOTIFY PO WHEN CLIENT HAS ENTERED THE LAST PHASE.**

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Involvement ID: DUI-20190102-1

Arrest: 01/01/2019

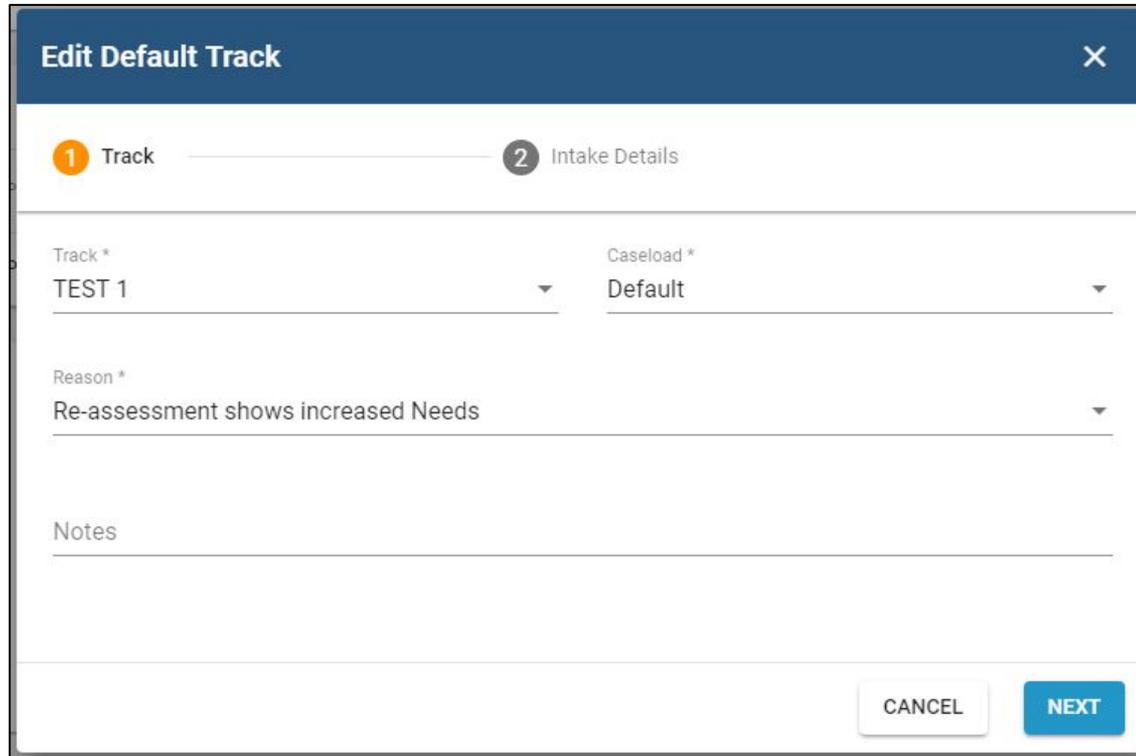
# INVOLVEMENT OVERVIEW - TRANSFER TRACKS

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						<a href="#">CHANGE PHASE STATUS</a> ▼
Track	Phase	Status	Start Date	End Date	Days in Phase	
Adult	 Recovery	 In Progress	01/26/2018	<b>Earliest Promotion: 04/30/2018</b>	24	
Adult	Stabilization	 Complete	01/12/2018	01/26/2018	14	

# INVOLVEMENT OVERVIEW - TRANSFER TRACKS

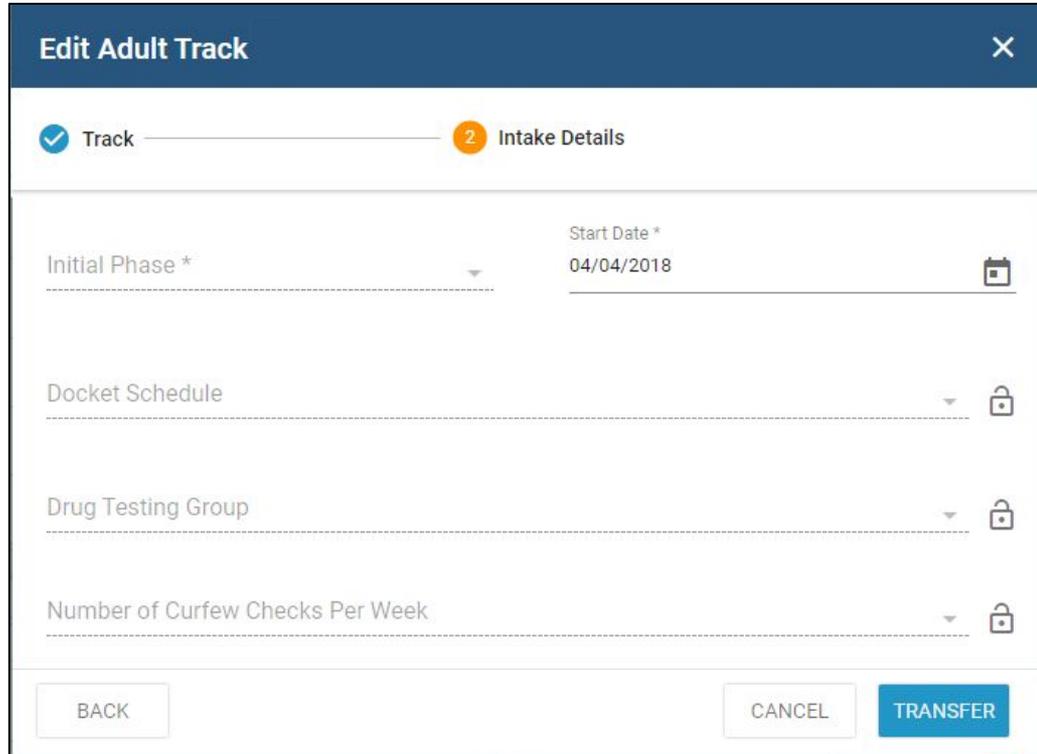
The first step allows the User to select the new Tack, Caseload, reason, and the ability to enter additional notes.



The screenshot shows a modal window titled "Edit Default Track" with a close button (X) in the top right corner. The form is divided into two steps: "1 Track" (highlighted with an orange circle) and "2 Intake Details" (highlighted with a grey circle). The "Track" field is a dropdown menu with "TEST 1" selected. The "Caseload" field is a dropdown menu with "Default" selected. The "Reason" field is a dropdown menu with "Re-assessment shows increased Needs" selected. Below these fields is a "Notes" text area. At the bottom right, there are two buttons: "CANCEL" and "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.



The screenshot shows a modal window titled "Edit Adult Track" with a close button (X) in the top right corner. Below the title bar, there are two steps: "Track" (completed, indicated by a blue checkmark) and "Intake Details" (current step, indicated by an orange circle with the number 2). The form contains the following fields:

- Initial Phase \***: A dropdown menu with a downward arrow.
- Start Date \***: A text input field containing "04/04/2018" and a calendar icon to its right.
- Docket Schedule**: A dropdown menu with a downward arrow and a lock icon to its right.
- Drug Testing Group**: A dropdown menu with a downward arrow and a lock icon to its right.
- Number of Curfew Checks Per Week**: A dropdown menu with a downward arrow and a lock icon to its right.

At the bottom of the form, there are three buttons: "BACK" (disabled), "CANCEL" (disabled), and "TRANSFER" (active, highlighted in blue).

# 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

**CHANGE PHASE STATUS** ▾

- Promote Days In Phase
- Demote 134
- Suspend
- Graduate
- Terminate

Accounting

Current Amount Due  
**\$0.00**

Community Service

# 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 Stabilization	START DATE 11/19/2018	EARLIEST END DATE 2/19/2019	MILESTONES 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		_____ ▾

NEXT

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 Recovery	START DATE 1/16/2019	EARLIEST END DATE 4/16/2019	MINIMUM DURATION 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**

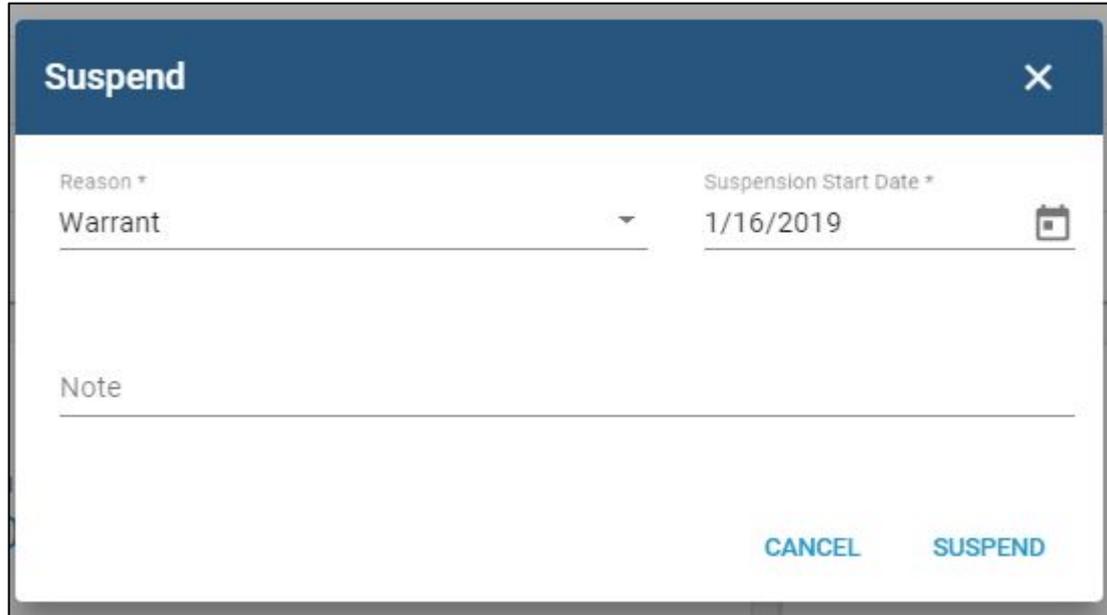
PHASE Stabilization	START DATE 1/16/2019 <input type="text"/>	EARLIEST END DATE 4/16/2019	MINIMUM DURATION 3 Months
------------------------	--	--------------------------------	------------------------------

**MILESTONES**

MILESTONE	DUE DATE
<input checked="" type="checkbox"/> 1. Sign contract	Date required <input type="text"/>
<input checked="" type="checkbox"/> 2. Sign color line	Date required <input type="text"/>
<input checked="" type="checkbox"/> 3. Report to re-entry or recovery facility as ordered	1/19/2019 <input type="text"/>
<input checked="" type="checkbox"/> 4. Report to case manager	1/19/2019 <input type="text"/>
<input checked="" type="checkbox"/> 5. Contact Dr. Murphey	1/23/2019 <input type="text"/>
<input checked="" type="checkbox"/> 6. Contact treatment provider to enter treatment	1/23/2019 <input type="text"/>
<input checked="" type="checkbox"/> 7. Review participant handbook	1/23/2019 <input type="text"/>
<input checked="" type="checkbox"/> 8. Seek sponsor	1/23/2019 <input type="text"/>
<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

## CHANGE PHASE - SUSPEND INVOLVEMENT

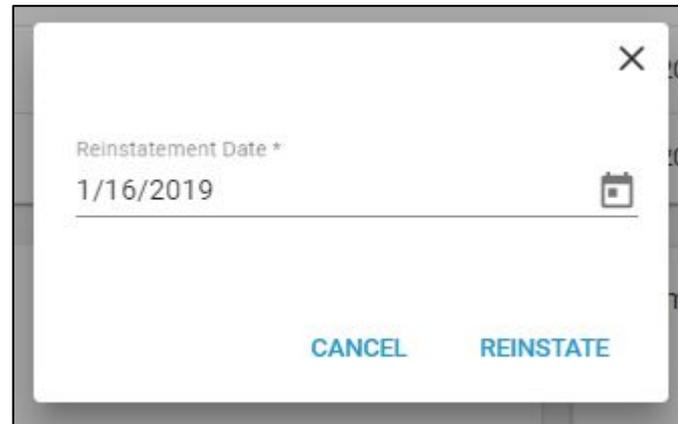
There may be scenarios in which a User would want to Suspend an Involvement (such as a warrant issued for the Client). Users have the ability to suspend an involvement. When suspending an involvement, the Client is no longer included on system generated tasks such as a hearing, randomized drug test,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



The screenshot shows a 'Suspend' dialog box with a dark blue header and a white body. The header contains the title 'Suspend' and a close button (X). The body contains two input fields: 'Reason \*' with a dropdown menu showing 'Warrant' and 'Suspension Start Date \*' with a date field showing '1/16/2019' and a calendar icon. Below these fields is a 'Note' field with a horizontal line. 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 for reinstating an involvement. It features a close button (X) in the top right corner. The main content area contains the label "Reinstatement Date \*" followed by the date "1/16/2019" and a calendar icon. At the bottom, there 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 *	Termination Date *
Failed to Complete <span>▼</span>	1/16/2019 <span>📅</span>

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	

## 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.

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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](#)

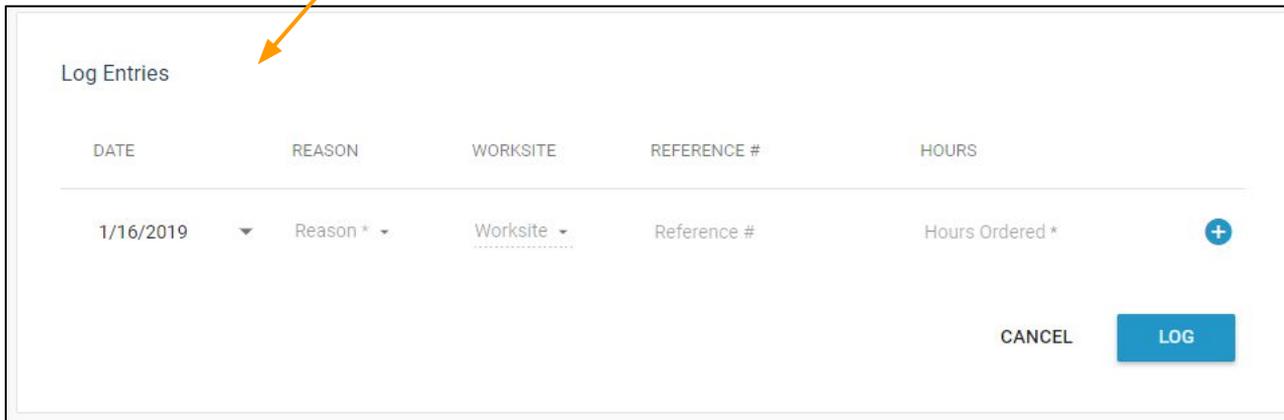
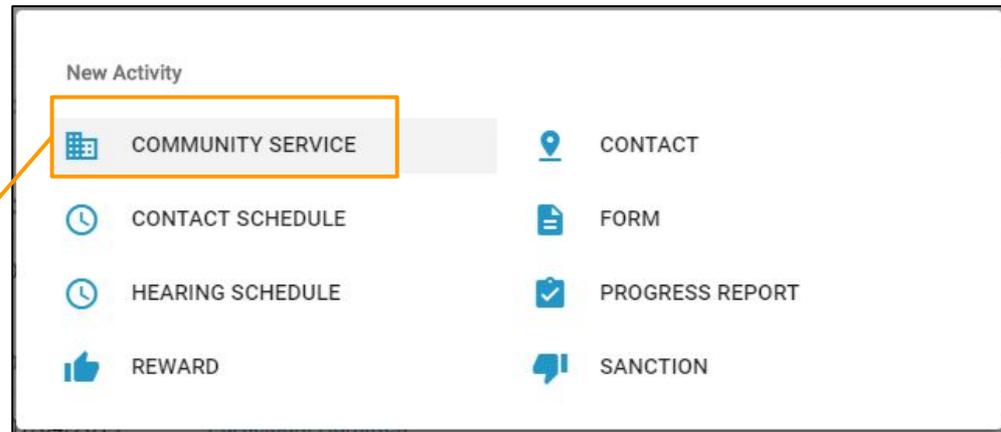
+
🖨️
🔄
☰

Date ↓	Type	Notes	Description	Action By
<b>TODAY &amp; UPCOMING</b>				
02/05/2019	Drug Test	+	Drug Test Scheduled	Eileen Marin <span style="float: right;">↓</span>
<b>OLDER THAN TODAY</b>				
01/04/2019	Participant Admitted			Eileen Marin

127

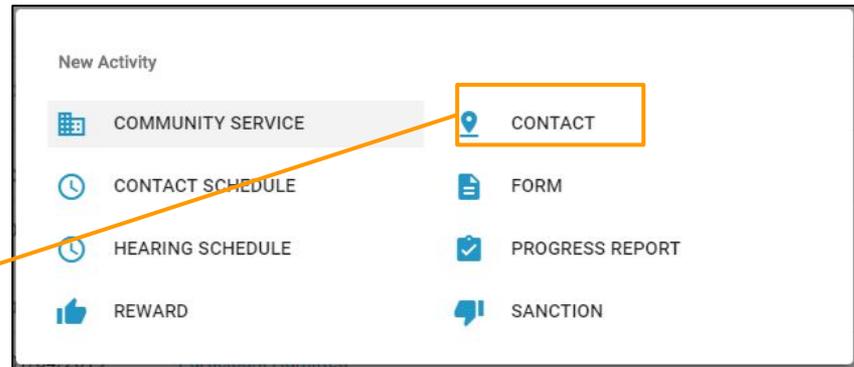
# NEW ACTIVITIES - COMMUNITY SERVICE

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 ACTIVITIES - CONTACT

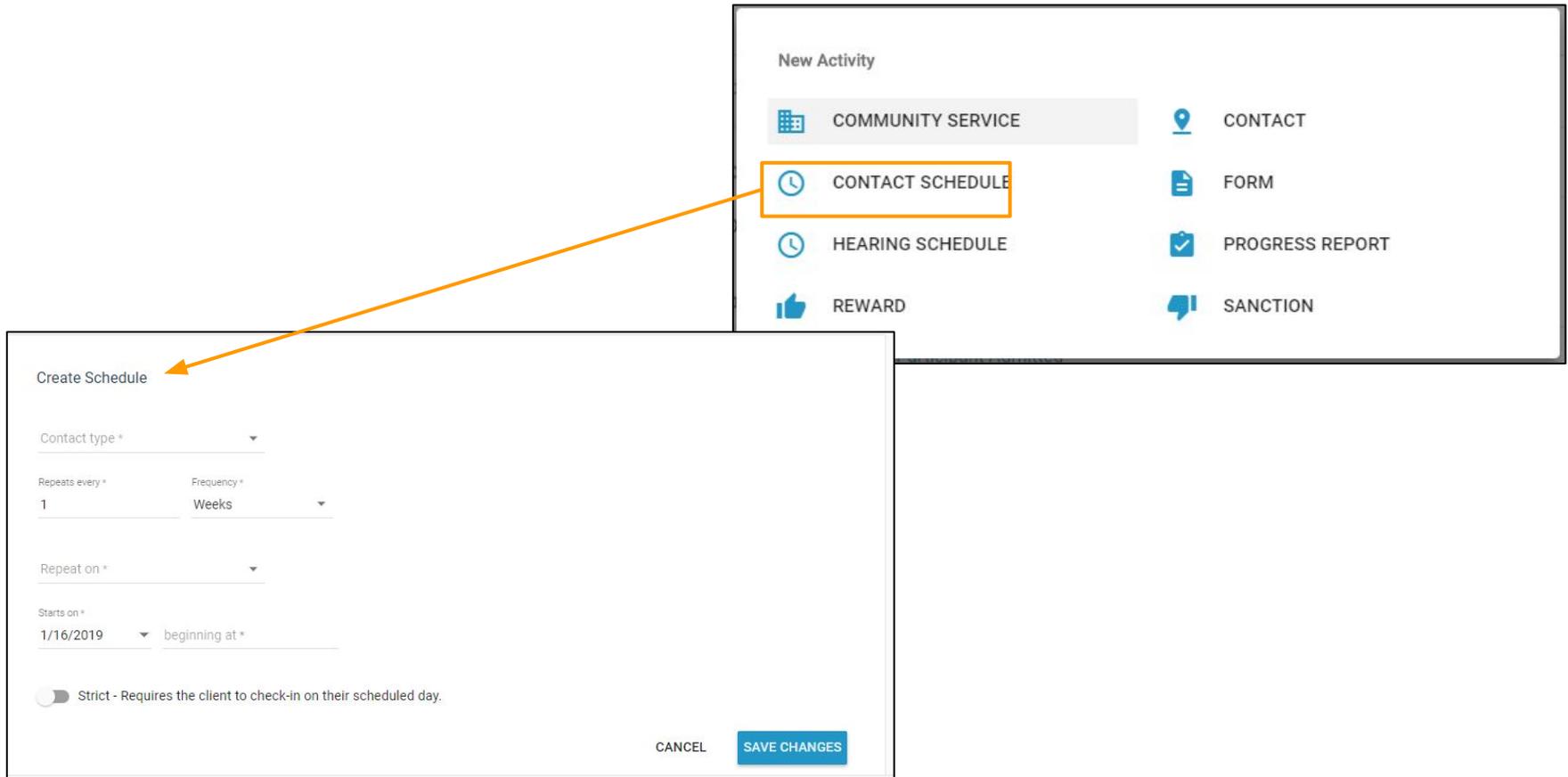
When a User clicks on the Contact activity, they can record a completed Contact. Users are required to select a Contact type, Contact date, and start time. Users also have the ability to add additional notes.



A screenshot of the 'Create Contact' form. The form is titled 'Create Contact' and contains the following fields: 'CONTACT DETAILS', 'Contact type\*' (a dropdown menu), 'Contact date\*' (a date selector showing '1/16/2019') and 'Start time\*' (a time selector), and 'Notes' (a text area). At the bottom of the form, there are two buttons: 'CANCEL' and 'CREATE CONTACT'.

# 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).

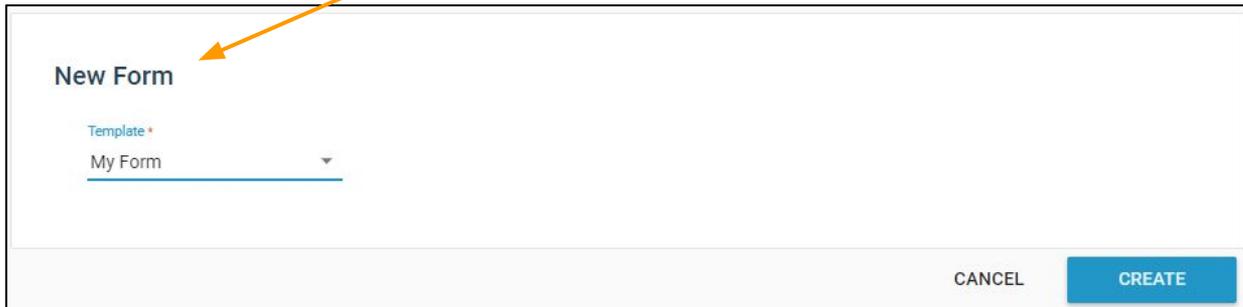
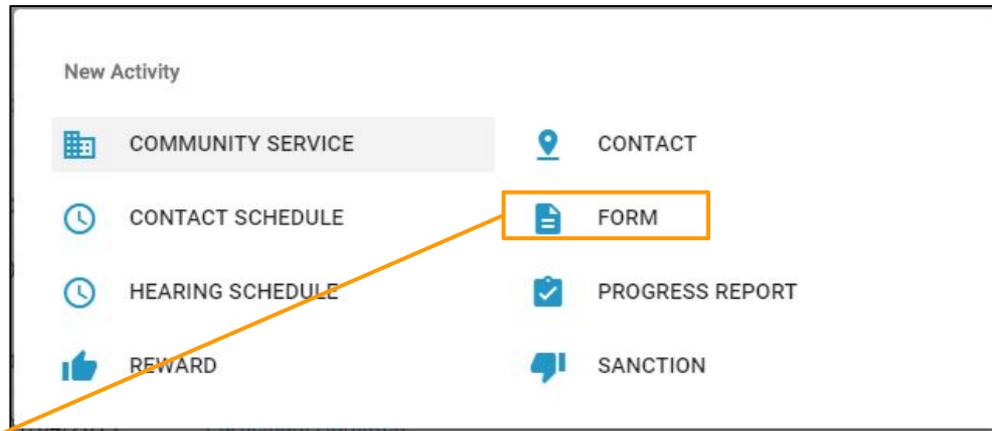


The image shows two overlapping screenshots from a software interface. The top screenshot, titled "New Activity", displays a grid of activity options: COMMUNITY SERVICE, CONTACT, FORM, HEARING SCHEDULE, PROGRESS REPORT, REWARD, and SANCTION. The "CONTACT SCHEDULE" option is highlighted with an orange box. An orange arrow points from this box to the "Create Schedule" form shown in the bottom screenshot. The "Create Schedule" form includes the following fields and controls:

- Contact type \***: A dropdown menu.
- Repeats every \***: A text input field containing "1".
- Frequency \***: A dropdown menu set to "Weeks".
- Repeat on \***: A dropdown menu.
- Starts on \***: A date input field containing "1/16/2019".
- beginning at \***: A dropdown menu.
- Strict**: A toggle switch that is currently turned off, with the text "Strict - Requires the client to check-in on their scheduled day." below it.
- CANCEL** and **SAVE CHANGES** buttons at the bottom right.

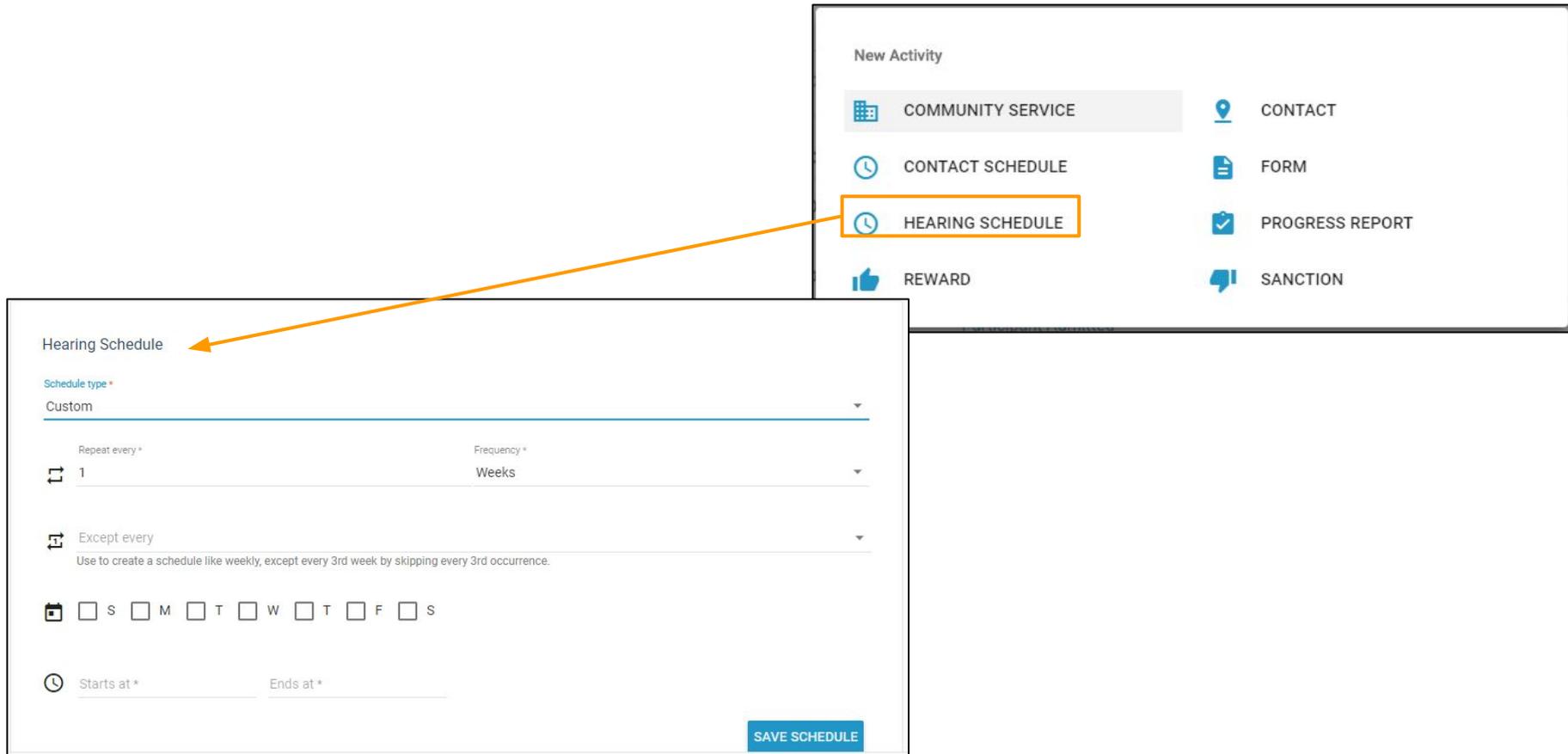
## NEW ACTIVITIES - FORM

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.



# 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.

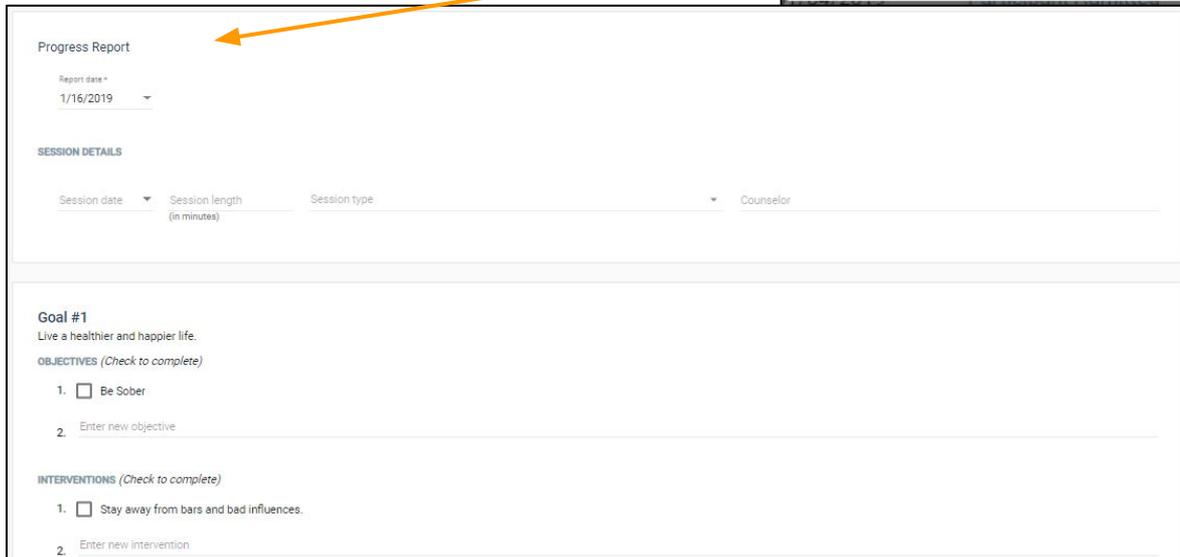
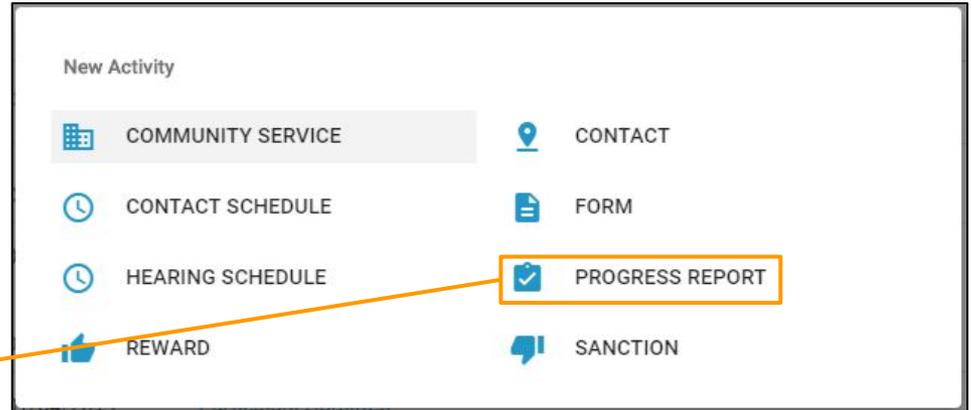


The image shows two screenshots from a software interface. The top screenshot, titled "New Activity", displays a grid of activity options: COMMUNITY SERVICE, CONTACT, CONTACT SCHEDULE, FORM, HEARING SCHEDULE (highlighted with an orange box), PROGRESS REPORT, REWARD, and SANCTION. An orange arrow points from the "HEARING SCHEDULE" option to the bottom screenshot. The bottom screenshot, titled "Hearing Schedule", shows a configuration form with the following fields:

- 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.
- Days**:  S  M  T  W  T  F  S
- Starts at \***: \_\_\_\_\_
- Ends at \***: \_\_\_\_\_
- SAVE SCHEDULE** button

# NEW ACTIVITIES - PROGRESS REPORT

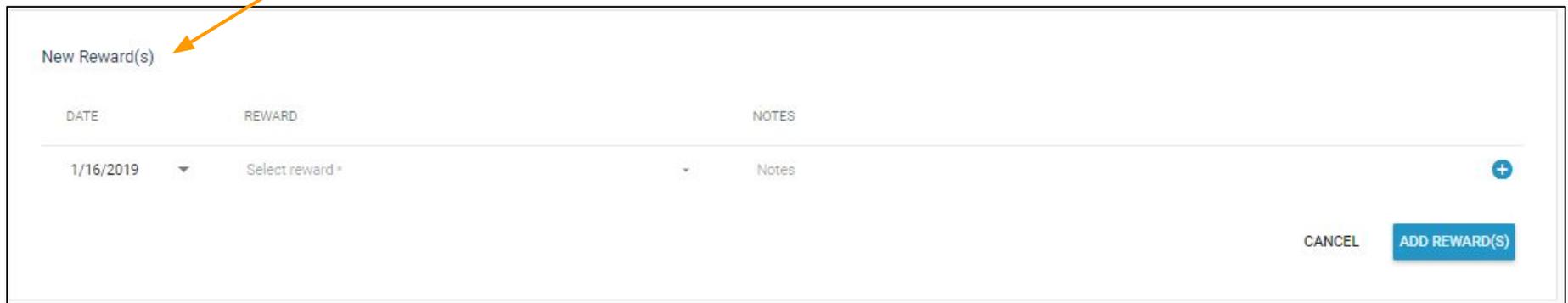
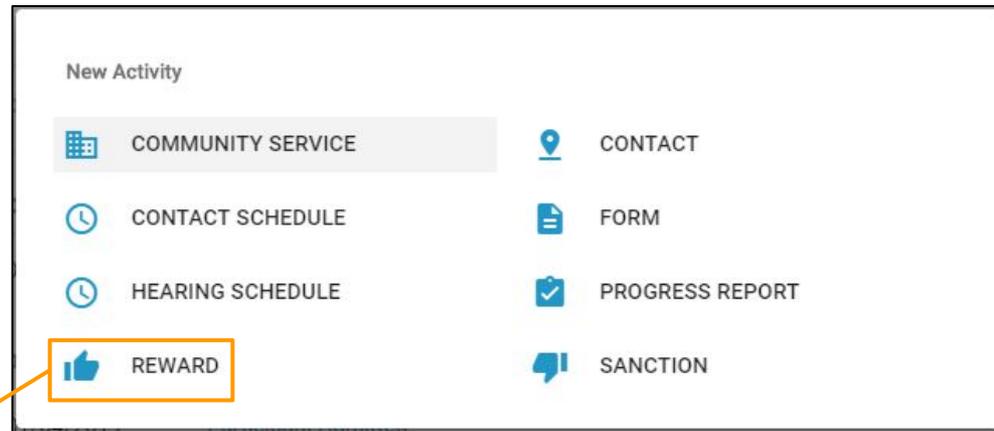
Users have the ability to enter a Progress Report from the new activity option. The Client must have an existing treatment plan with goals in order to complete a progress report.



The image shows the 'Progress Report' form. It includes a 'Report date' dropdown set to '1/16/2019'. Below this is a 'SESSION DETAILS' section with fields for 'Session date', 'Session length (in minutes)', 'Session type', and 'Counselor'. The form also includes a 'Goal #1' section with the objective 'Live a healthier and happier life.' and a list of 'OBJECTIVES (Check to complete)' and 'INTERVENTIONS (Check to complete)'. The first objective is '1.  Be Sober' and the first intervention is '1.  Stay away from bars and bad influences.'

## 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.



A screenshot of the 'New Reward(s)' form. The form has a title 'New Reward(s)' and a table with three columns: DATE, REWARD, and NOTES. The DATE column has a dropdown menu with '1/16/2019' selected. The REWARD column has a dropdown menu with 'Select reward \*' selected. The NOTES column has a text input field with 'Notes' and a plus sign icon. At the bottom right of the form, there are two buttons: 'CANCEL' and 'ADD REWARD(S)'.

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

# 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 image shows two overlapping screenshots from a software application. The top screenshot, titled "New Activity", displays a menu with several options: "COMMUNITY SERVICE", "CONTACT", "ACT SCHEDULE", "FORM", "ING SCHEDULE", "PROGRESS REPORT", and "SANCTION". The "SANCTION" option is highlighted with an orange box. An orange arrow points from this box to the "New Sanction" form in the bottom screenshot.

The bottom screenshot, titled "New Sanction", shows a form with the following fields and sections:

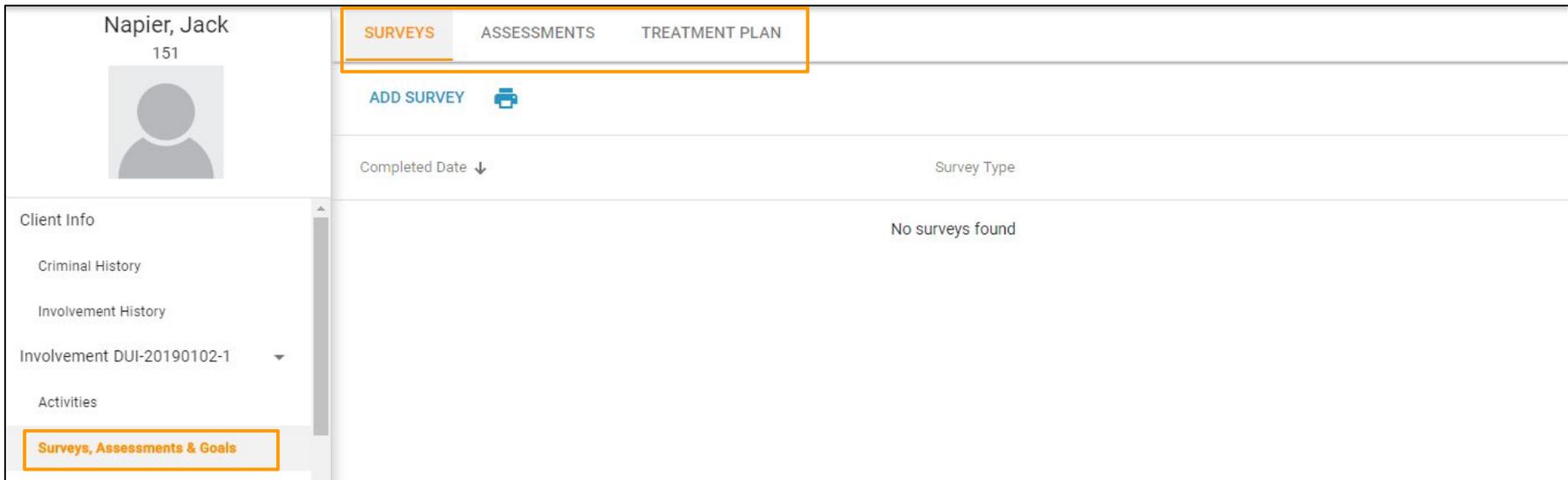
- Sanction Date:** 1/16/2019 (dropdown menu)
- Notes:** (text input field)
- POLICY RECOMMENDED SANCTIONS:** There are no recommended sanctions for the infractions listed.
- ALL OTHER SANCTIONS:** A list of checkboxes for various sanctions:
  - Reprimand
  - Two (2) hours community service
  - Four (4) hours community service
  - Double community service requirement
  - Six (6) hours community service
  - Pay \$70 for confirmation testing
  - Reset Sobriety date
  - Contract extension

## Subtopics:

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

# SURVEYS, ASSESSMENTS & GOALS - OVERVIEW

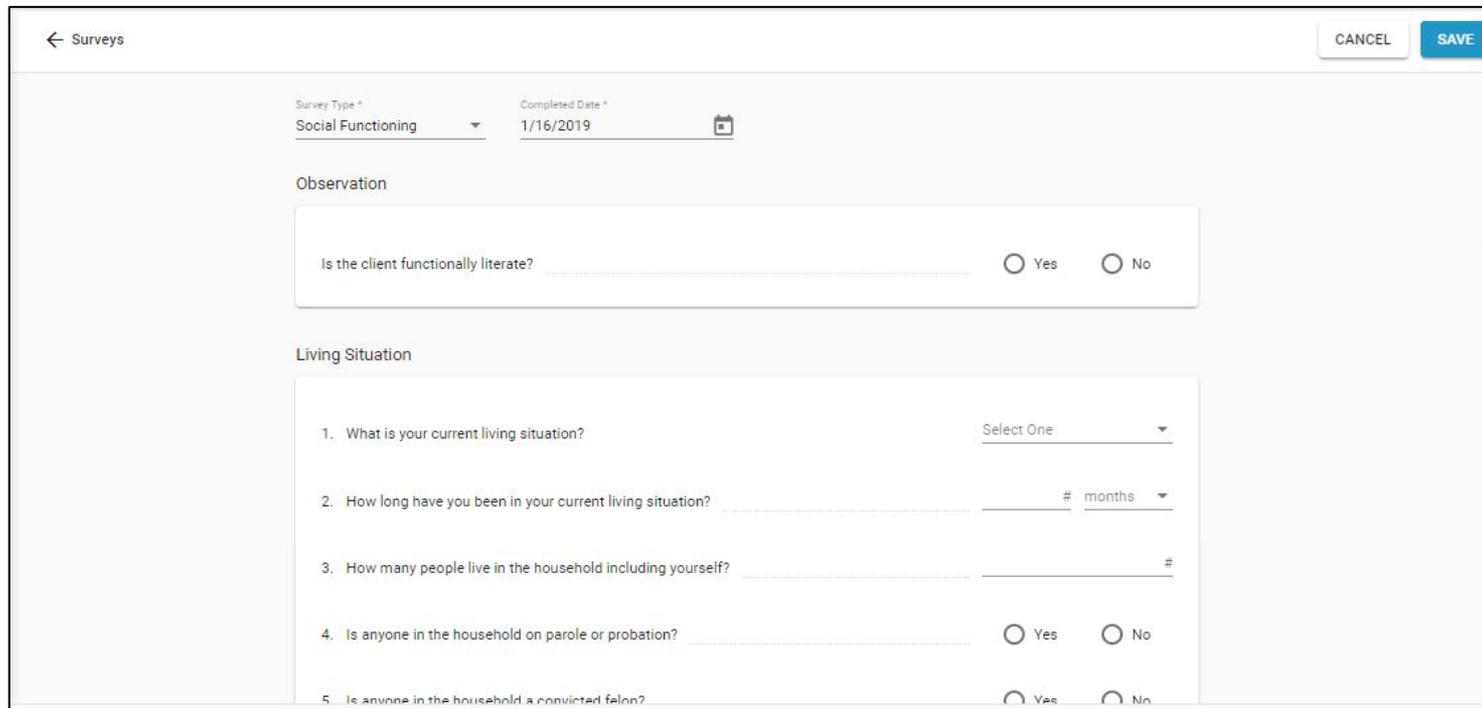
In this section, Users have the ability to record a Survey, Assessment, Treatment Plan, and create a Progress Report. While each of these functions are typically completed at the beginning of the program, they can be administered at any time during the Client's participation.



The screenshot displays the AutoMon interface for a client named Napier, Jack (ID 151). The interface is divided into a sidebar on the left and a main content area on the right. The sidebar includes a 'Client Info' section with links for 'Criminal History', 'Involvement History', and 'Activities'. A dropdown menu shows 'Involvement DUI-20190102-1'. At the bottom of the sidebar, a button labeled 'Surveys, Assessments & Goals' is highlighted with an orange border. The main content area features a navigation bar with three tabs: 'SURVEYS' (highlighted with an orange border), 'ASSESSMENTS', and 'TREATMENT PLAN'. Below the tabs is an 'ADD SURVEY' button with a printer icon. A table header shows 'Completed Date' with a downward arrow and 'Survey Type'. The table body contains the text '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 interface for adding a survey. At the top left is a back arrow and the text "Surveys". At the top right are "CANCEL" and "SAVE" buttons. Below this is a form with two main sections: "Observation" and "Living Situation".

**Survey Details:**

- Survey Type: Social Functioning (dropdown menu)
- Completed Date: 1/16/2019 (calendar icon)

**Observation Section:**

Is the client functionally literate?  Yes  No

**Living Situation Section:**

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.

<a href="#">SURVEYS</a>	ASSESSMENTS	TREATMENT PLAN
<a href="#">ADD SURVEY</a> 		
Completed Date ↓	Survey Type	
<a href="#">01/16/2019</a>	Social Functioning	 <a href="#">Edit Survey</a> <a href="#">Delete Survey</a>

# 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.

<a href="#">SURVEYS</a>	<b>ASSESSMENTS</b>	<a href="#">TREATMENT PLAN</a>
<a href="#">ADD ASSESSMENT</a>		
Completed Date ↓	Instrument	Outcome
01/15/2019	TCU Drug Screen V	Disorder: No disorder (0)

---

Assessment \*

ORAS-CST

PSA

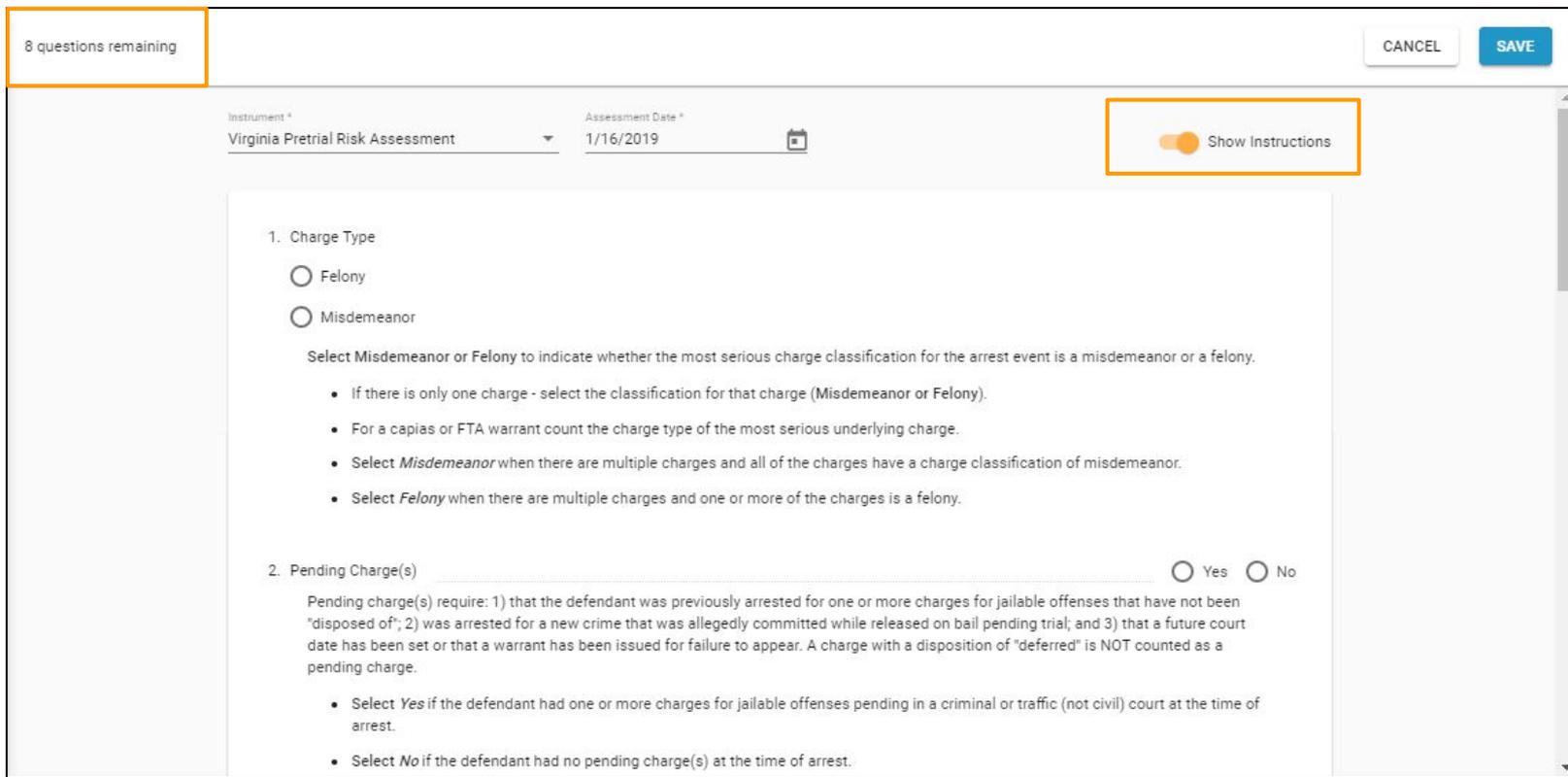
TCU Drug Screen V

Virginia Pretrial Risk Assessment

Assessment Date \* 1/16/2019 

# 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.

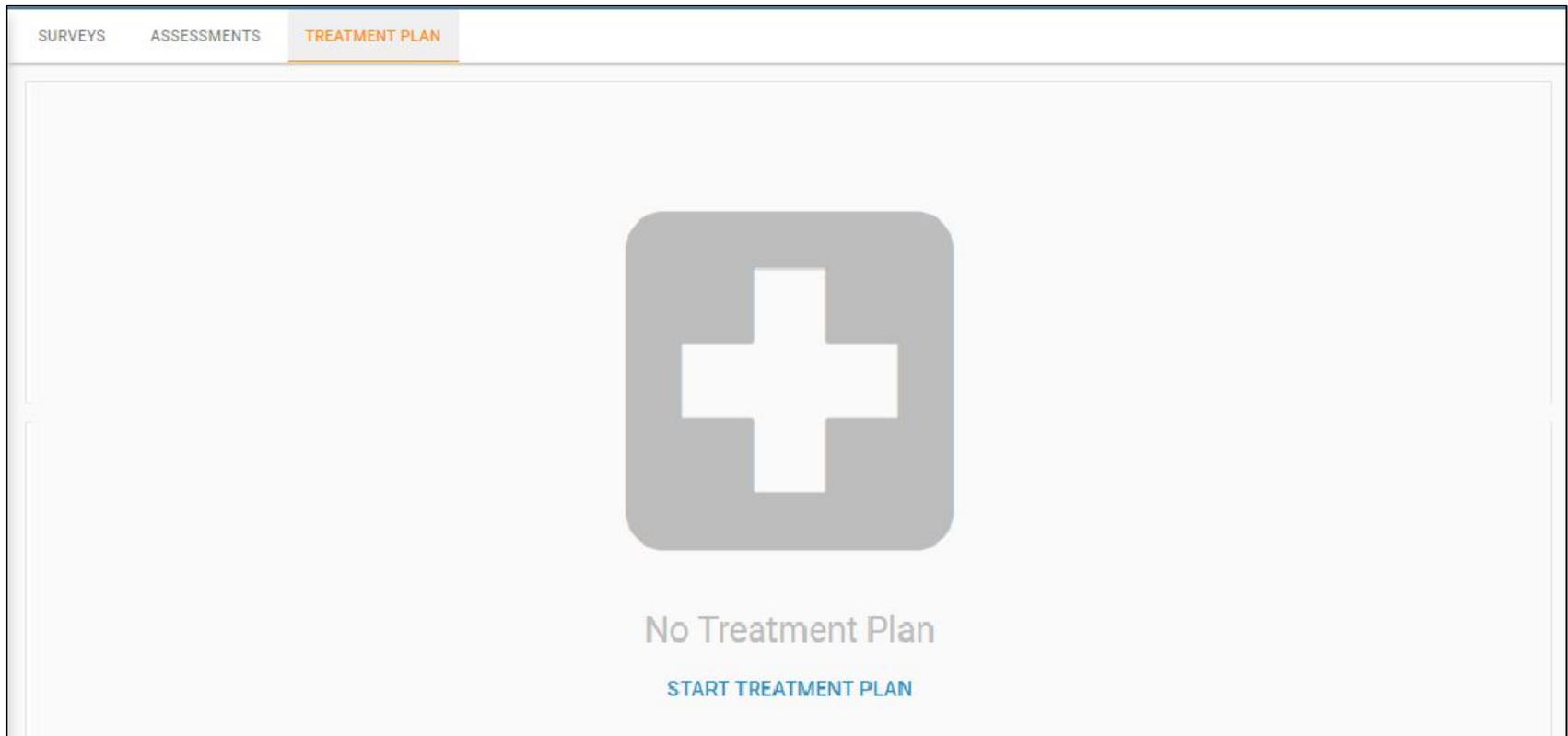
- If there is only one charge - select the classification for that charge (Misdemeanor or Felony).
- For a capias or FTA warrant count the charge type of the most serious underlying charge.
- Select *Misdemeanor* when there are multiple charges and all of the charges have a charge classification of misdemeanor.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

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.**



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,

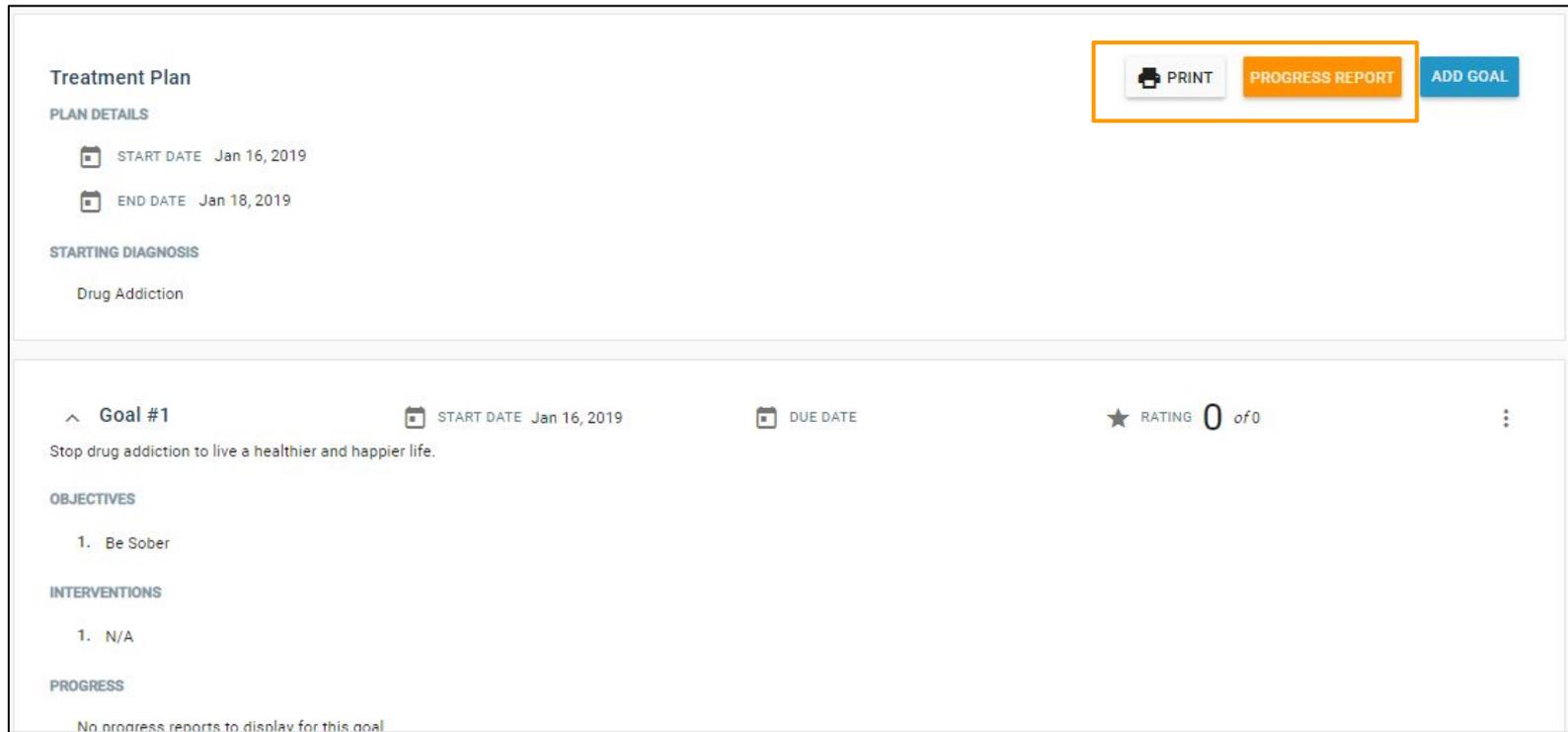
---

CANCEL **START PLAN**

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

The image shows a software interface for managing a treatment plan. The top section, titled "Treatment Plan", contains three buttons: "PRINT", "PROGRESS REPORT", and "ADD GOAL". The "ADD GOAL" button is highlighted with an orange box. Below this section, under "PLAN DETAILS", are two date fields: "START DATE Jan 16, 2019" and "END DATE Jan 16, 2020". Under "STARTING DIAGNOSIS", the text "Drug Addiction." is displayed. A modal form is open below, titled "NARRATIVE", with a text input field containing "Enter goal narrative here \*". Below this are sections for "OBJECTIVES" and "INTERVENTIONS", each with a numbered list item "1. Enter objective here..." and "1. Enter intervention here..." respectively. At the bottom right of the modal are "CANCEL" and "CREATE GOAL" buttons. An orange arrow points from the "ADD GOAL" button to the "NARRATIVE" input field.

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



The screenshot displays the 'Treatment Plan' interface. At the top right, there are three buttons: 'PRINT', 'PROGRESS REPORT', and 'ADD GOAL'. The 'PROGRESS REPORT' button is highlighted with an orange border. Below the buttons, the 'Treatment Plan' section includes 'PLAN DETAILS' with 'START DATE Jan 16, 2019' and 'END DATE Jan 18, 2019', and 'STARTING DIAGNOSIS' as 'Drug Addiction'. The 'Goal #1' section shows a description 'Stop drug addiction to live a healthier and happier life.', 'START DATE Jan 16, 2019', 'DUE DATE', and 'RATING 0 of 0'. Under 'OBJECTIVES', there is one item '1. Be Sober'. Under 'INTERVENTIONS', there is one item '1. N/A'. The 'PROGRESS' section at the bottom states '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.

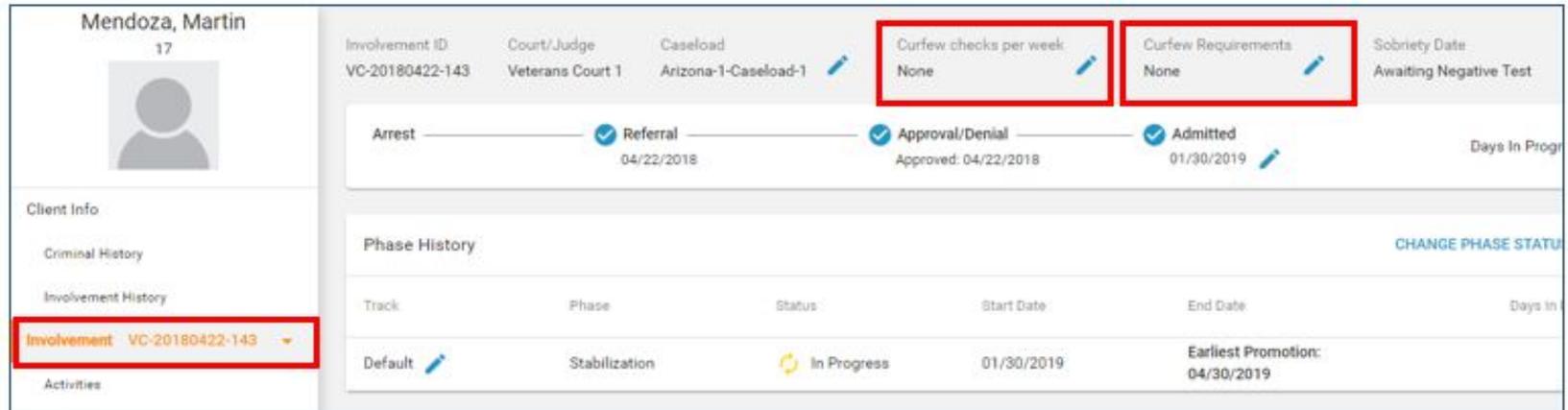
In a future release, AutoMon will enhance this section to also include managing the Client's hearings and contacts.

The screenshot displays the AutoMon interface for a client named Jack Napier (ID 151). The main section is titled "DRUG TESTING" and contains two buttons: "SCHEDULE DRUG TESTS" and "LOG NEW DRUG TEST". Below these 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, titled "Show future drug tests scheduled through", with "Today" selected. The dropdown options are: "today" (selected), "next 7 days", "next 30 days", and "Specific Date" (with a calendar icon). "CANCEL" and "APPLY" buttons are at the bottom of the dropdown. The left sidebar shows navigation options: 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 (with a red notification badge).

## 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**  
17

Involvement ID: VC-20180422-143 | Court/Judge: Veterans Court 1 | Caseload: Arizona-1-Caseload-1

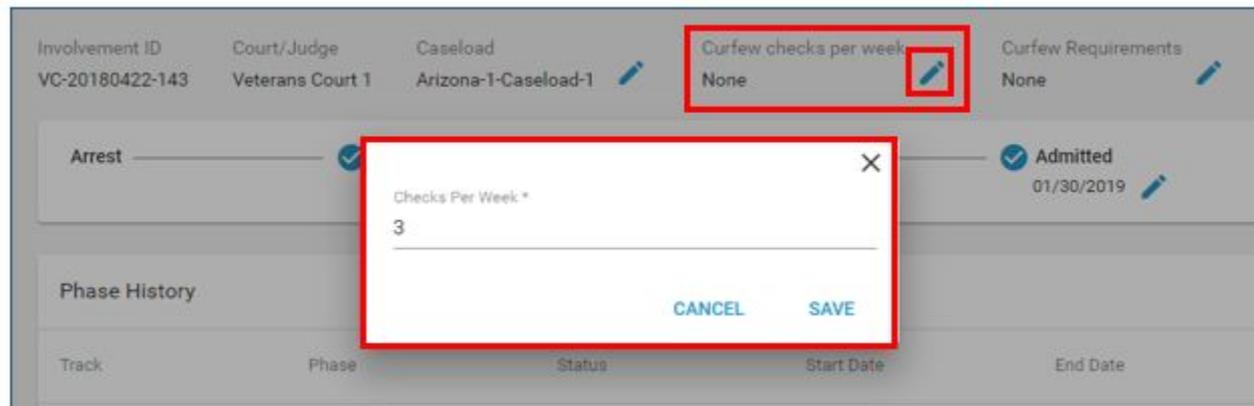
Curfew checks per week: None | Curfew Requirements: None | Sobriety Date: Awaiting Negative Test

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

Phase History

Track	Phase	Status	Start Date	End Date	Days In
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 — Admitted (01/30/2019)

Phase History

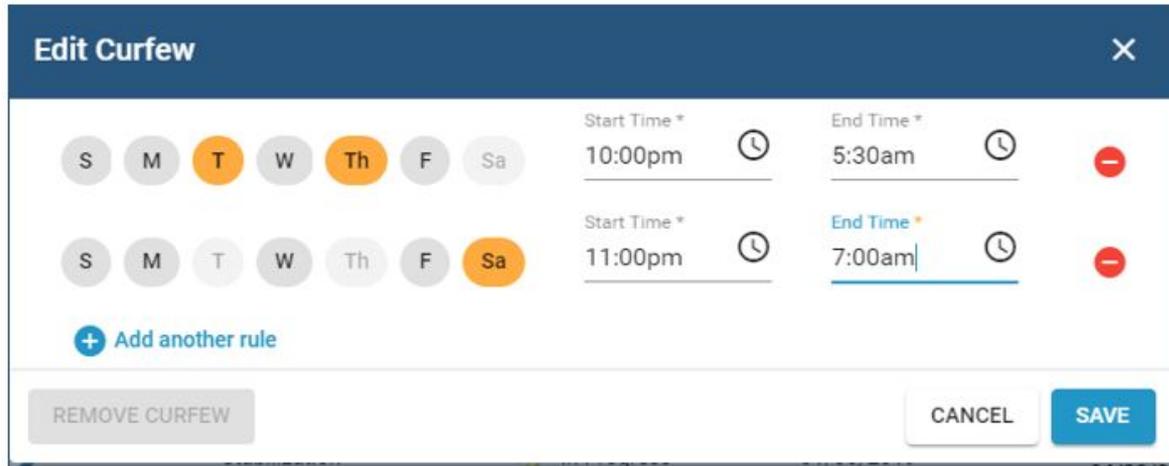
Track	Phase	Status	Start Date	End Date

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 [🕒] End Time \* 5:30am [🕒] [−]

S  M  T  W  Th  F  Sa

Start Time \* 11:00pm [🕒] End Time \* 7:00am [🕒] [−]

[+ Add another rule](#)

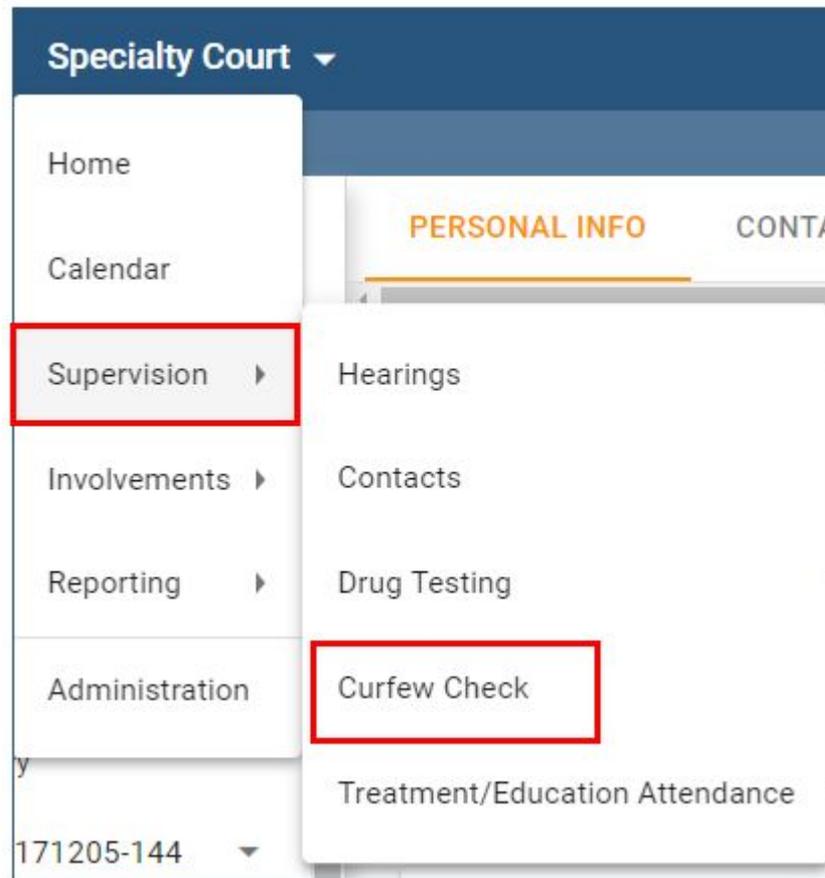
REMOVE CURFEW [CANCEL] [SAVE]

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

🔍

Caseload

- Arizona
- Arizona-1-Caseload-1
- Arizona-1-Caseload-2

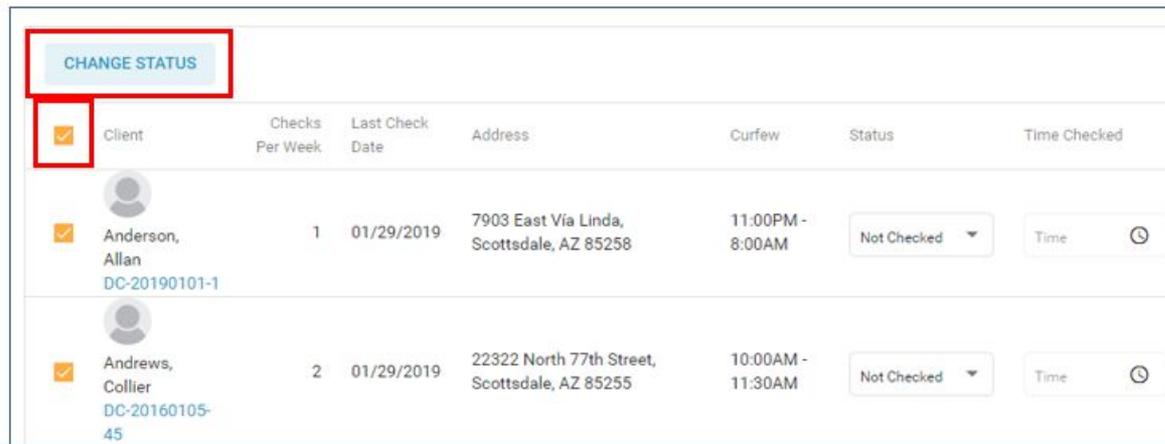
Precinct

- (No Precinct)
- Phoenix
- Scottsdale

# SUPERVISION - RECORDING CURFEW CHECKS

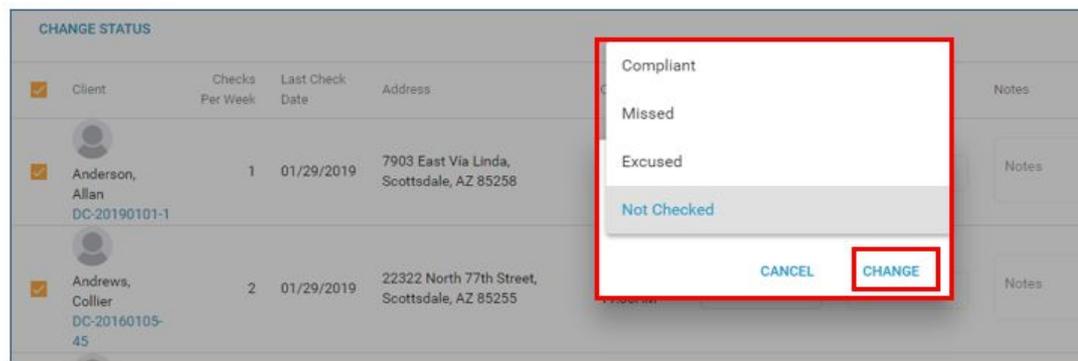
## Batch Entry (All Scheduled Clients)

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*.



<input checked="" type="checkbox"/>	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.



<input checked="" type="checkbox"/>	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	Notes
<input checked="" type="checkbox"/>	 Andrews, Collier DC-20160105-45	2	01/29/2019	22322 North 77th Street, Scottsdale, AZ 85255	Notes

Compliant

Missed

Excused

Not Checked

# 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

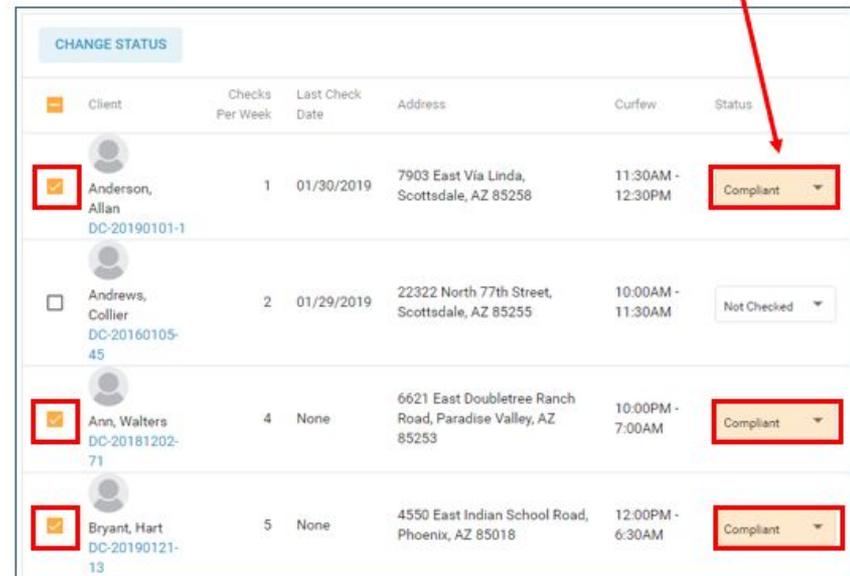
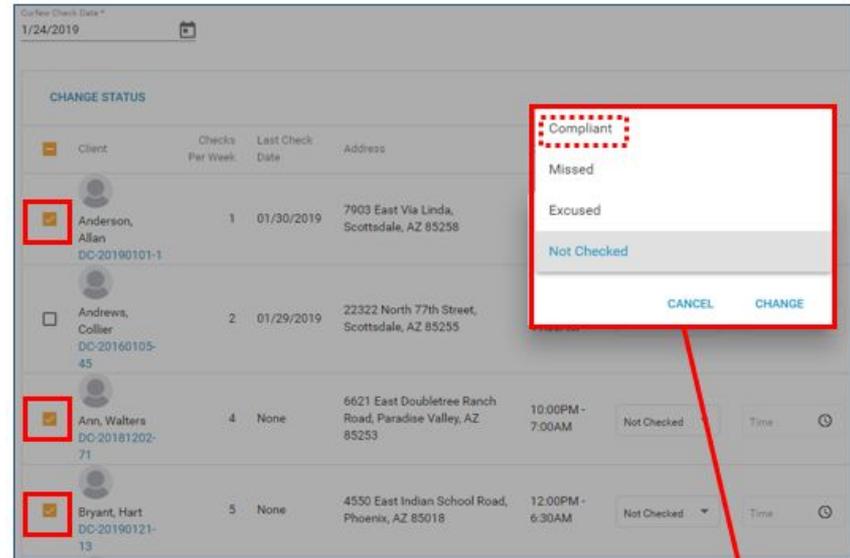
**CHANGE STATUS**

<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 	<input type="text" value="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 	<input type="text" value="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 	<input type="text" value="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.



# SUPERVISION - RECORDING CURFEW CHECKS

## Recording Curfew Checks for an Individual Client

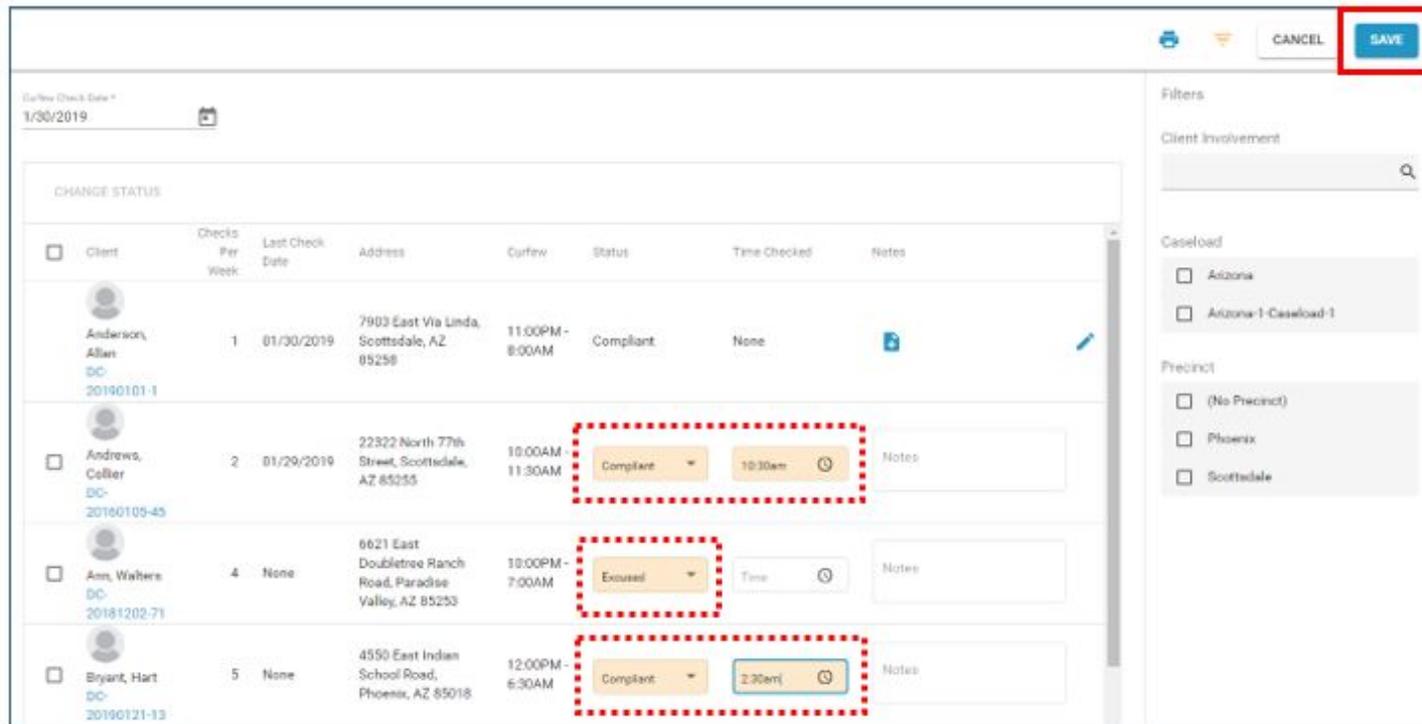
To complete a Curfew Check on one individual Client, Users would change the Status for the individual Client, record the Time Checked and any associated Notes.

CHANGE STATUS

	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.



Curfew Check Date \*  
1/30/2019

CANCEL SAVE

CHANGE STATUS

Client	Checks Per Week	Last Check Date	Address	Curfew	Status	Time Checked	Notes
Anderson, Allan DC: 20190101-1	1	01/30/2019	7903 East Via Linda, Scottsdale, AZ 85258	11:00PM - 8:00AM	Compliant	None	
Andrews, Collier DC: 20160109-45	2	01/29/2019	22322 North 77th Street, Scottsdale, AZ 85255	10:00AM - 11:30AM	Compliant	10:30am	Notes
Ann, Wilhens DC: 20181202-71	4	None	6621 East Doubletree Ranch Road, Paradise Valley, AZ 85253	10:00PM - 7:00AM	Excused	Time	Notes
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

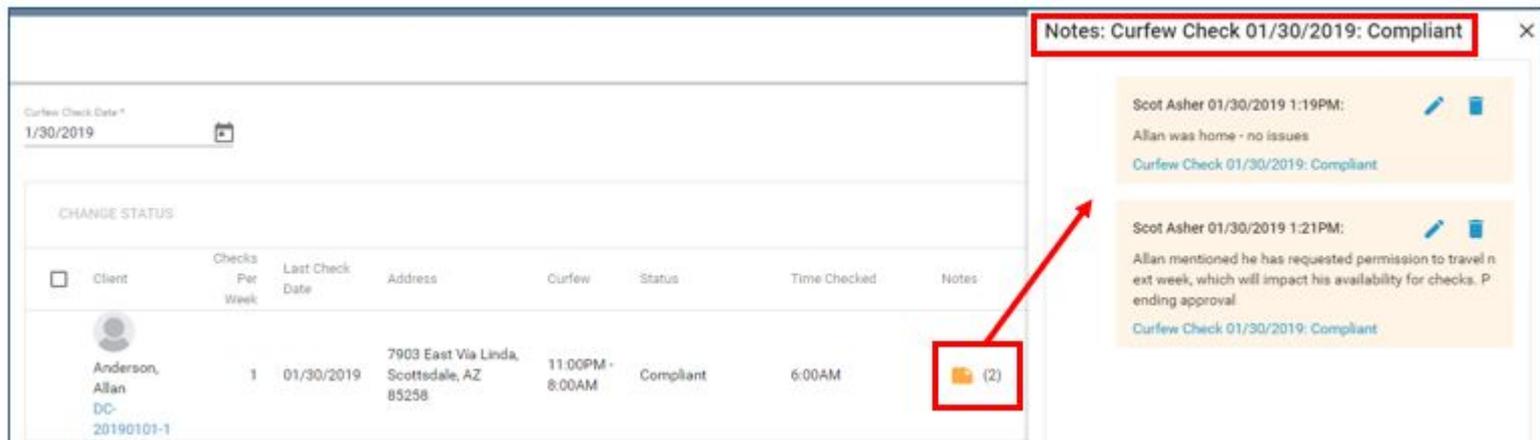
- (No Precinct)
- Phoenix
- Scottsdale

# 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.



The screenshot shows the AutoMon interface with a curfew check record for Allan Anderson on 01/30/2019. The record is marked as 'Compliant' and has a 'Notes' icon with '(2)' next to it. A red arrow points from this icon to a pop-up window titled 'Notes: Curfew Check 01/30/2019: Compliant'. The pop-up window displays two notes:

- 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.

The screenshot displays the client profile for Allan Anderson (ID: 151). The left sidebar contains various menu items, with 'Notes' highlighted in orange. The main content area shows a list of notes:

- 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](#)

A red box highlights the 'Notes' menu item in the sidebar, and a red arrow points from it to the list of notes. A red bracket on the right side of the notes list groups the three most recent entries.

# 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

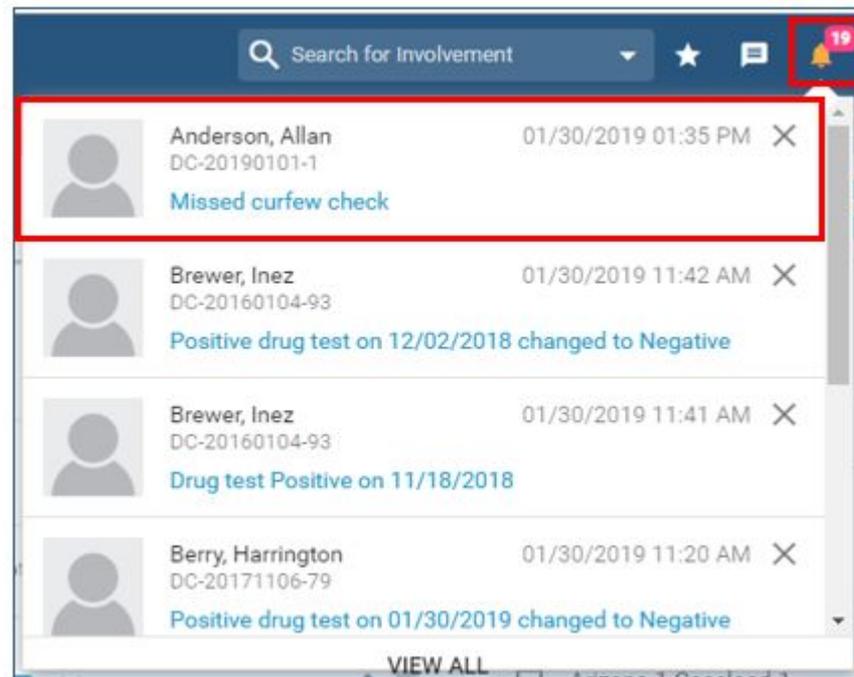
Tasks

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

+ 🖨️ 🔄 ☰

Date ↓	Type	Notes	Description	Action By
<b>TODAY &amp; UPCOMING</b>				
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
<b>OLDER THAN TODAY</b>				
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

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  days
 
 Ends after  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					
<a href="#">SCHEDULE DRUG TESTS</a>		<a href="#">LOG NEW DRUG TEST</a>		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					
<a href="#">SCHEDULE DRUG TESTS</a>		<a href="#">LOG NEW DRUG TEST</a>		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	▲
<div style="display: flex; justify-content: space-between;"> <div>  <p>Napier, Jack DUI-20190102-1</p> </div> <div> <p>Schedule Type By Individual</p> </div> <div> <p>Scheduled By emarin@automon.com</p> </div> <div> <p>Repeat Schedule Never</p> </div> </div> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> <div> <p>Collection Date Jan 17, 2019</p> </div> <div> <p>Outcome * ▼</p> </div> <div> <p>Testing Device ▼</p> </div> <div> <p>Notes</p> </div> </div> <div style="margin-top: 10px;"> <p><input type="checkbox"/> Sent for lab verification</p> <p>Specimen ID _____</p> </div>					
				<input type="button" value="CANCEL"/> <input type="button" value="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

 Napier, Jack  
 DUI-20190102-1

Final Outcome  
 Negative

Schedule Type  
 By Individual

Scheduled By  
 emarin@automon.com

↑  
✎

Collection Date  
 01/17/2019

Initial Outcome  
 Negative

Testing Device  
 N/A

Notes  
+

**Test Result Details**  
 There are no results for this drug test

**Documents**  
 There are no documents for this drug test

## 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.

<p>Napier, Jack 151</p>  <p>Client Info</p> <ul style="list-style-type: none"> <li>Criminal History</li> <li>Involvement History</li> <li>Involvement DUI-20190102-1</li> <li>Activities</li> <li>Surveys, Assessments &amp; Goals</li> <li>Supervision</li> <li><b>Treatment/Education Attendance</b></li> </ul>	<p><b>TREATMENT SESSION REQUIREMENTS</b></p> <p>PROGRAM ENROLLMENT</p> <p>TREATMENT ATTENDANCE</p>
	<p>ADD SESSION REQUIREMENT </p>
	<p>Session Type ↑</p> <p>End By</p> <p>Attendance Compliance</p>
	<p>No session requirements found</p>

# 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 \* Frequency \*

Group therapy 8 # hours per week

---

Start Date \* End by \*

1/13/2019 Phase End Date

CANCEL
ADD

TREATMENT SESSION REQUIREMENTS	PROGRAM ENROLLMENT	TREATMENT ATTENDANCE
<span style="background-color: #ADD8E6; padding: 2px 5px; border: 1px solid #336699;">ADD SESSION REQUIREMENT</span> <span style="float: right;">🗑️</span>		
Session Type ↑	End By	Attendance Compliance
<input type="checkbox"/> Cognitive Behavioral Therapy	End of Stabilization Phase	0 of 1 compliant <span style="float: right;">▼</span>
<input type="checkbox"/> Counseling	01/19/2019	0 of 1 compliant <span style="float: right;">▼</span>
<input type="checkbox"/> Group therapy	End of Stabilization Phase	0 of 1 compliant <span style="float: right;">▼</span>

# 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
<a href="#">ADD SESSION REQUIREMENT</a> 		
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
Month starting 01/01/2019	15 hours per month	In Progress
		Completed Hours
		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	
<a href="#">ADD SESSION REQUIREMENT</a>				
Session Type ↓		End By	Attendance Compliance	
<input type="checkbox"/> Individual Counseling		End of Stabilization Phase	2 of 2 compliant ↓	
<input type="checkbox"/> Support Group		End of Stabilization Phase	2 of 3 compliant ↑	
<b>Compliance</b>				
Interval ↓	Requirement	Attendance Compliance	Completed Hours	Remaining Hours
Week starting 06/25/2018	7 hours per week	In Progress	<a href="#">3 hours</a>	4 hours
Week starting 06/18/2018	7 hours per week	Noncompliant	<a href="#">5 hours</a>	2 hours
Week starting 06/13/2018	7 hours per week	Compliant	<a href="#">7 hours</a>	0 hours
Week starting 06/06/2018	3 hours per week	Compliant	<a href="#">3 hours</a>	0 hours
		Items per page: <input type="text" value="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
<a href="#">ADD PROGRAM</a>		
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
<a href="#">ADD PROGRAM</a>		
Program ↑	Status	Status Date
Generic Recovery Program	Enrolled 	01/17/2019

### Edit Status ✕

Status \*  
Unenrolled ▼

Status Date  
1/17/2019 

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

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			
<a href="#">LOG ATTENDANCE</a>					
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				
<a href="#">LOG ATTENDANCE</a>						
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)	

-  Edit Attendance
-  Delete Attendance

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 <span style="float: right;">☰</span>						
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 <span style="float: right;">☰</span>						
Date ↓	Session Type	Program	Status	Session Length	Notes	
<input type="text" value="01/17/2019"/>	<input type="text" value="Counseling"/>	<input type="text" value="Generic Recovery Program"/>	<input type="text" value="Completed"/>	<input type="text" value="4 hours"/>	<input type="text" value=""/>	<input type="text" value=""/>
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

Users have the ability add Financial Obligations to the Client's involvement. Examples of an Obligation would be program fees, drug tests, community service fees, etc. System Admins have the ability to add new Obligation types. Users also have the ability to record additional charges or credits to an existing Obligation and record payments.

**Napier, Jack**  
151



Client Info

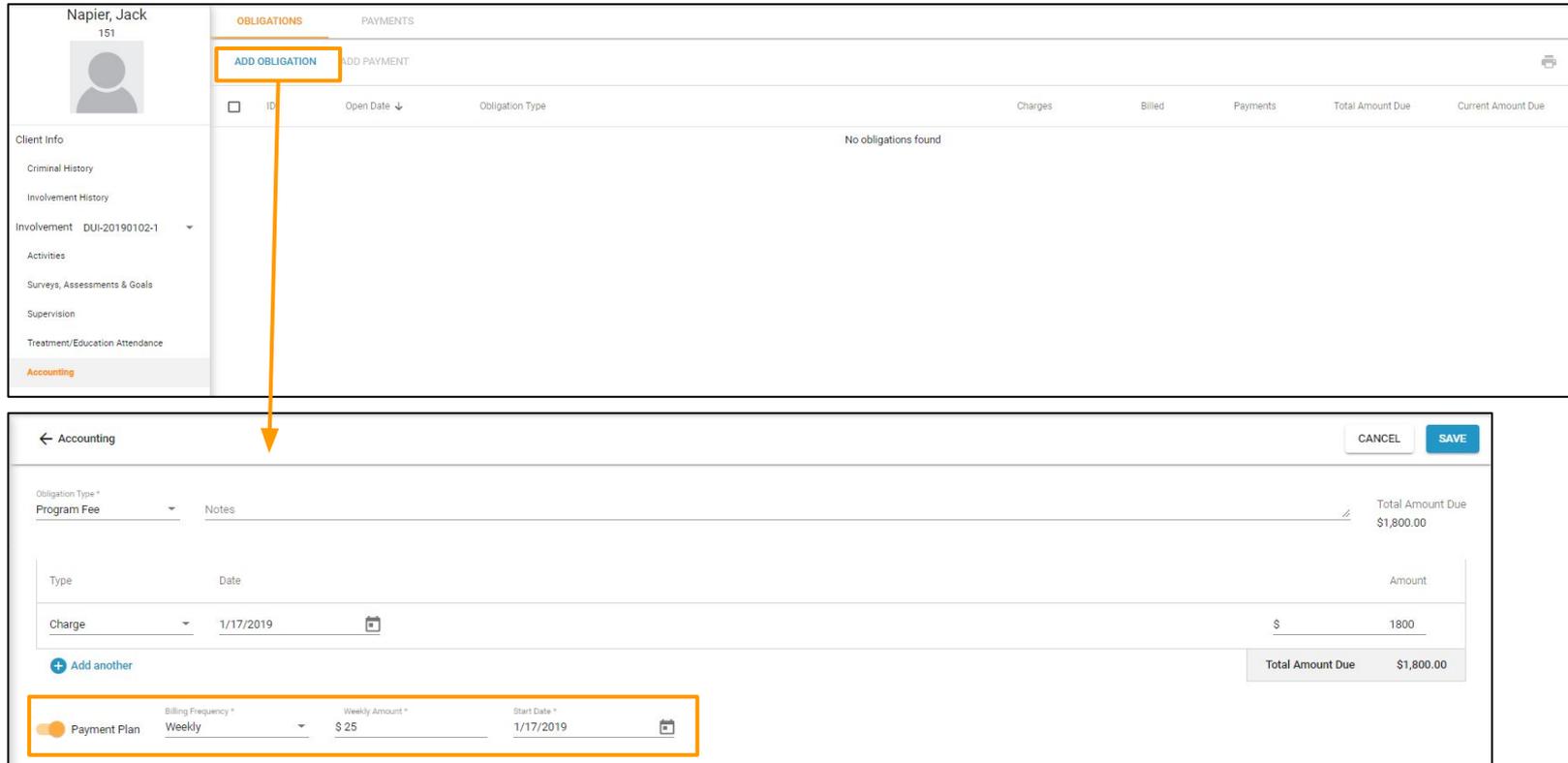
- Criminal History
- Involvement History
- Involvement DUI-20190102-1 ▾
- Activities
- Surveys, Assessments & Goals
- Supervision
- Treatment/Education Attendance
- Accounting

**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								

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.



The screenshot displays the 'Accounting - OBLIGATIONS' interface for client Napier, Jack (ID 151). The top section shows a sidebar with navigation options and a main table for obligations. An orange box highlights the 'ADD OBLIGATION' button, with an arrow pointing to the bottom section of the interface.

The bottom section is a form for adding a new obligation. It includes the following fields and values:

- Obligation Type: Program Fee
- Notes: (empty)
- Total Amount Due: \$1,800.00
- Type: Charge
- Date: 1/17/2019
- Amount: \$ 1800
- Payment Plan: Weekly
- 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
<div style="border: 1px solid orange; padding: 2px;">           Charge <span style="float: right;">1/17/2019 </span> </div>		<div style="border: 1px solid orange; padding: 2px; display: flex; align-items: center;"> <span>\$</span> <input style="width: 80px;" type="text" value="200"/> <span>200</span> <span style="margin-left: 10px;">-</span> </div>
<div style="border: 1px solid orange; padding: 2px; display: flex; align-items: center;"> <span style="margin-right: 5px;">+</span> Add another           </div>		

Total	\$2,000.00
<span style="color: blue;">+</span> Total Payments	\$0.00
<b>Total Amount Due</b>	<b>\$2,000.00</b>

# 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	Total Amount Due	Current Amount Due
Program Fee		\$1,600.00	\$25.00

Type	Date	Amount
Charge	01/17/2019	\$1,800.00
Credit	1/17/2019	\$ 200

[+ Add another](#)

	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							
<a href="#">ADD OBLIGATION</a>	<a href="#">ADD PAYMENT</a>								
<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
<b>Total Payments</b>	\$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 <span style="font-size: 0.8em;">▼</span>	\$ 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						
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 



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 Reinstate the Payment Plan. Users can click on the *Reinstate Payment Plan* button. Reinstating the Payment Plan will resume the automatic billing of the obligation.

OBLIGATIONS		PAYMENTS						
<a href="#">ADD OBLIGATION</a>	<a href="#">ADD PAYMENT</a>							
<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

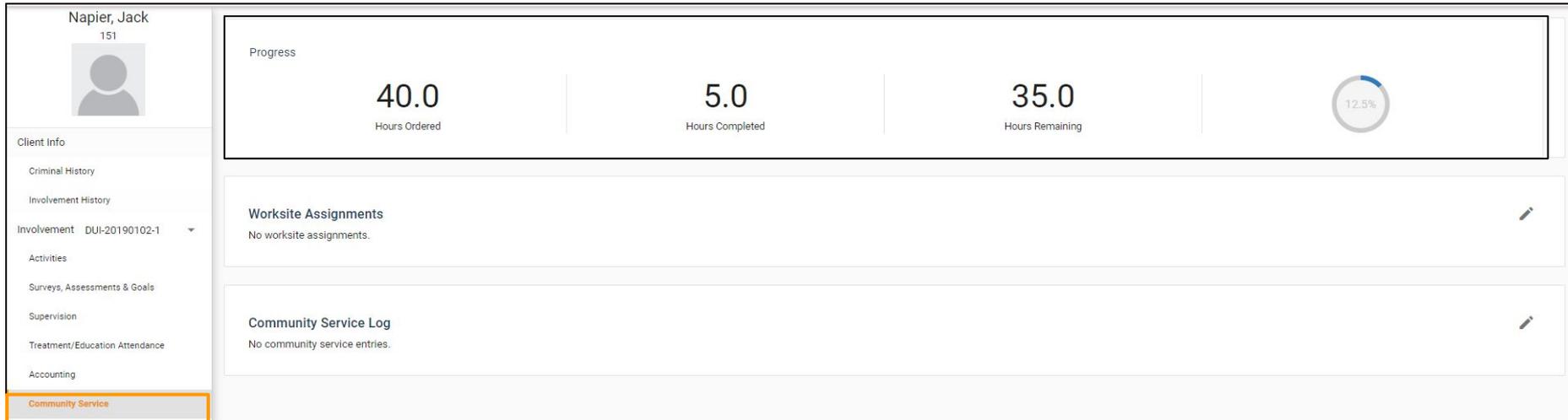
Items per page: 10 ▼ 1 - 1 of 1 < >

Total Billed	\$25.00
<span style="color: blue;">+</span> Total Payments	\$0.00
Current Amount Due	\$25.00

## Subtopics:

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

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.



**Napier, Jack**  
151



**Client Info**

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

Progress

<b>40.0</b> Hours Ordered	<b>5.0</b> Hours Completed	<b>35.0</b> 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

ASSIGN(0)

VIEW SELECTED SITES

# 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 <small>Hours Ordered</small>	5.0 <small>Hours Completed</small>	35.0 <small>Hours Remaining</small>	
--------------------------------------	---------------------------------------	--	---

---

**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	BALANCE
Jan 17, 2019	Initial Order		40	35
Jan 17, 2019	Attendance	AutoMon LLC - 6621 North Scottsdale Road, Scottsdale, AZ 85250	-2	-5
Jan 17, 2019	Attendance		-3	-3

**AutoMon LLC**
**Worksite List Report**

---

**Organization:** AutoMon LLC

**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

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

# 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

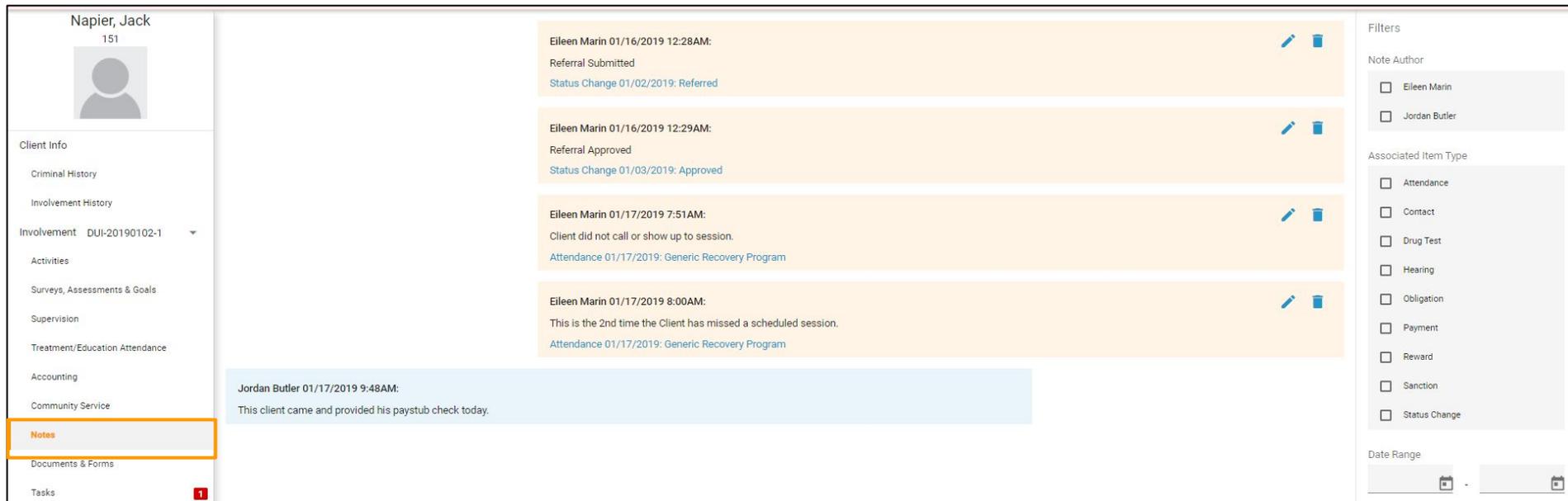
DATE	REASON	WORKSITE	REFERENCE #	HOURS	
1/17/2019	Reason * Initial Order	Worksite	Reference #	Hours Ordered * 40	- +
1/17/2019	Reason * Attendance	Worksite * AutoMon LLC - 6621 North Scottsdale Road, Scottsdale, AZ 85250	Reference #	Hours Completed * 2	- +
1/17/2019	Reason * Attendance	Worksite * None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



The screenshot displays the 'Notes' section for a client named Napier, Jack (ID: 151). The interface is divided into several sections:

- Client Profile (Left):** Shows the client's name, ID, and a list of navigation options including Client Info, Criminal History, Involvement History, Involvement (DUI-20190102-1), Activities, Surveys, Assessments & Goals, Supervision, Treatment/Education Attendance, Accounting, Community Service, **Notes** (highlighted), Documents & Forms, and Tasks (with a red notification badge).
- Notes List (Center):** A list of notes with the following entries:
  - 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 (Right):**
  - Note Author:** Eileen Marin, Jordan Butler.
  - Associated Item Type:** Attendance, Contact, Drug Test, Hearing, Obligation, Payment, Reward, Sanction, Status Change.
  - Date Range:** A date range selector with calendar icons.

# 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.

**Napier, Jack**  
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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

**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

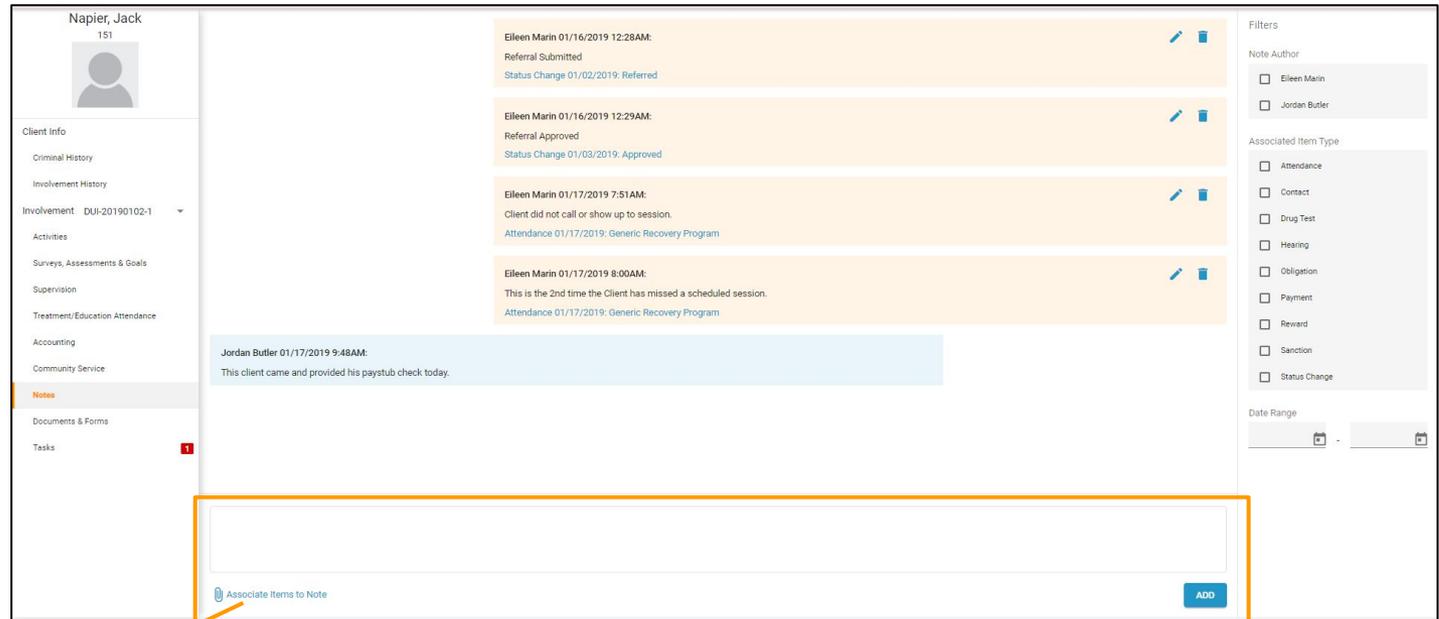
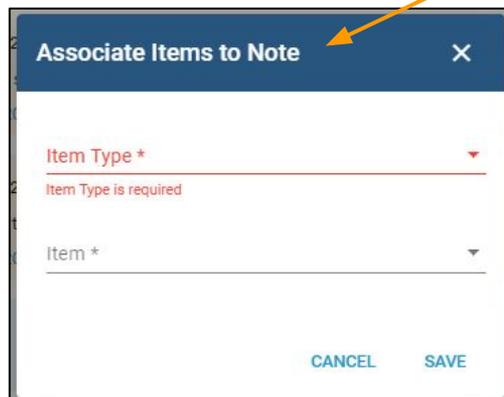
- Attendance
- Contact
- Drug Test
- Hearing
- Obligation
- Payment
- Reward
- Sanction
- Status Change

Date Range

📅 - 📅

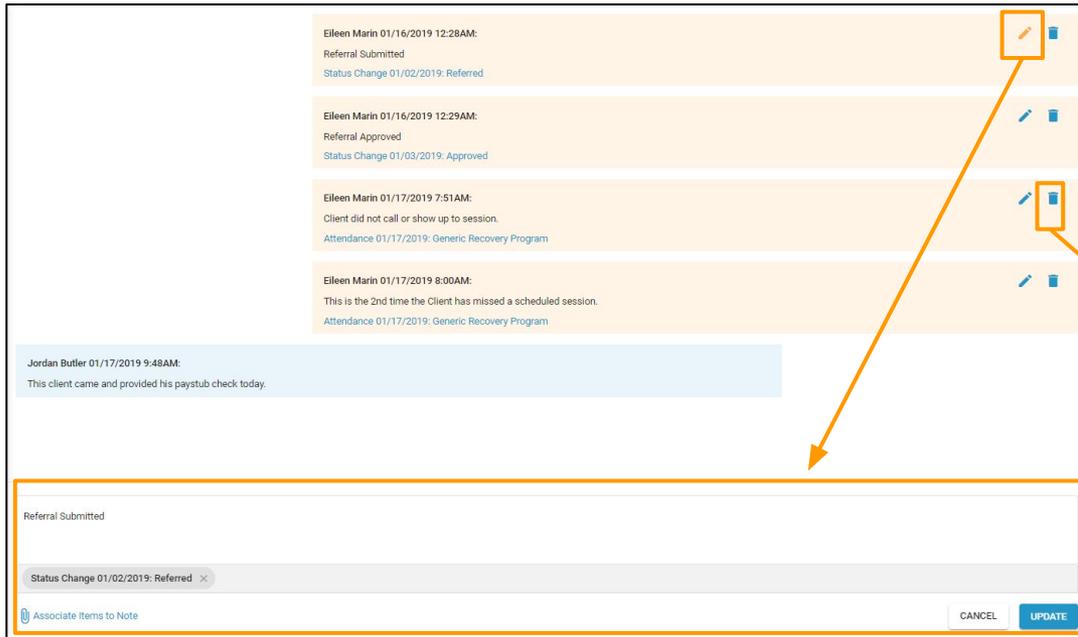
TREATMENT SESSION REQUIREMENTS	PROGRAM ENROLLMENT	TREATMENT ATTENDANCE				
<a href="#">LOG ATTENDANCE</a>						
Date ↓	Session Type	Program	Status	Session Length	Notes	
1/17/2019 📅 - 1/17/2019 📅	📄	Generic Recovery Program	📄	📄	✕	
01/17/2019	Counseling	Generic Recovery Program	✅ Completed	4 hours	📄	
01/17/2019	Counseling	Generic Recovery Program	✅ Completed	3 hours	📄	
01/17/2019	Cognitive Behavioral Therapy	Generic Recovery Program	❌ Missed	2 hours	📄 (2)	

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.

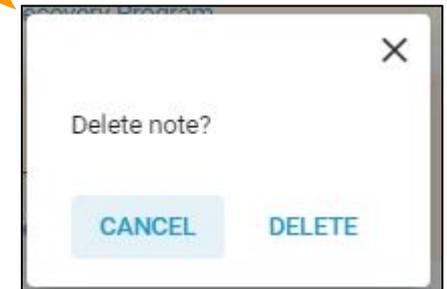



# NOTES - EDITING AND DELETING NOTES

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.



The screenshot shows a list of notes. The first note is highlighted in orange and has a pen icon and a trash can icon next to it. The second note is also highlighted in orange and has a pen icon and a trash can icon next to it. The third note is highlighted in orange and has a pen icon and a trash can icon next to it. The fourth note is highlighted in orange and has a pen icon and a trash can icon next to it. The fifth note is highlighted in light blue and has no icons. Below the notes is a text input field with the text "Referral Submitted" and a "Status Change 01/02/2019: Referred" tag. There are "Associate Items to Note", "CANCEL", and "UPDATE" buttons at the bottom.



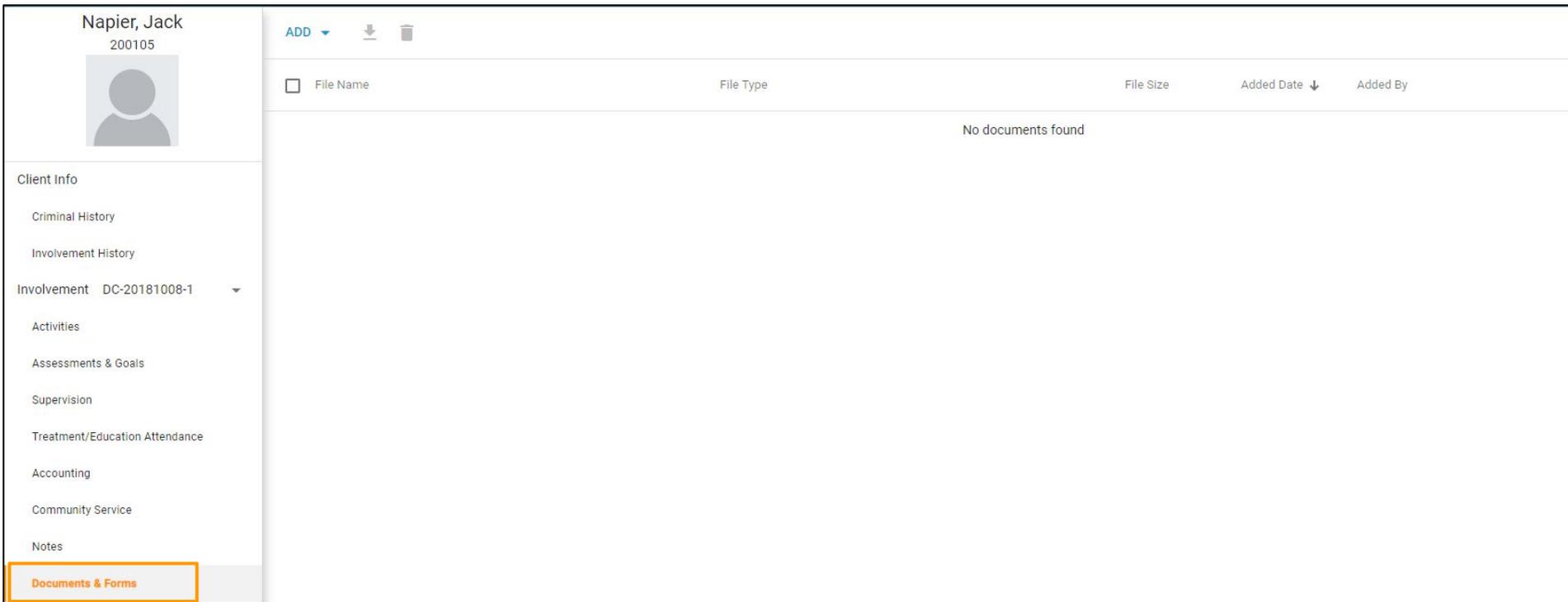
A dialog box with a close button (X) in the top right corner. The text "Delete note?" is centered. Below the text are two buttons: "CANCEL" and "DELETE".

## 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.

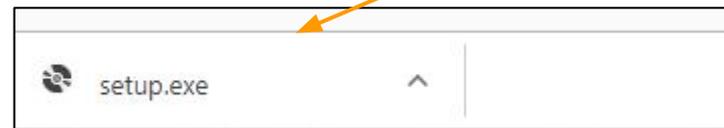
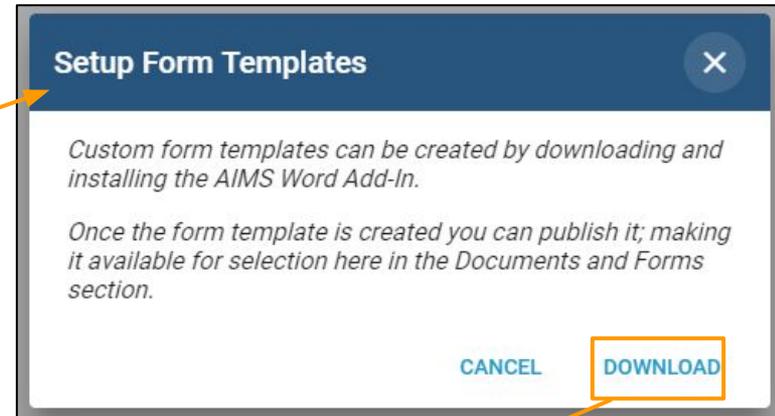
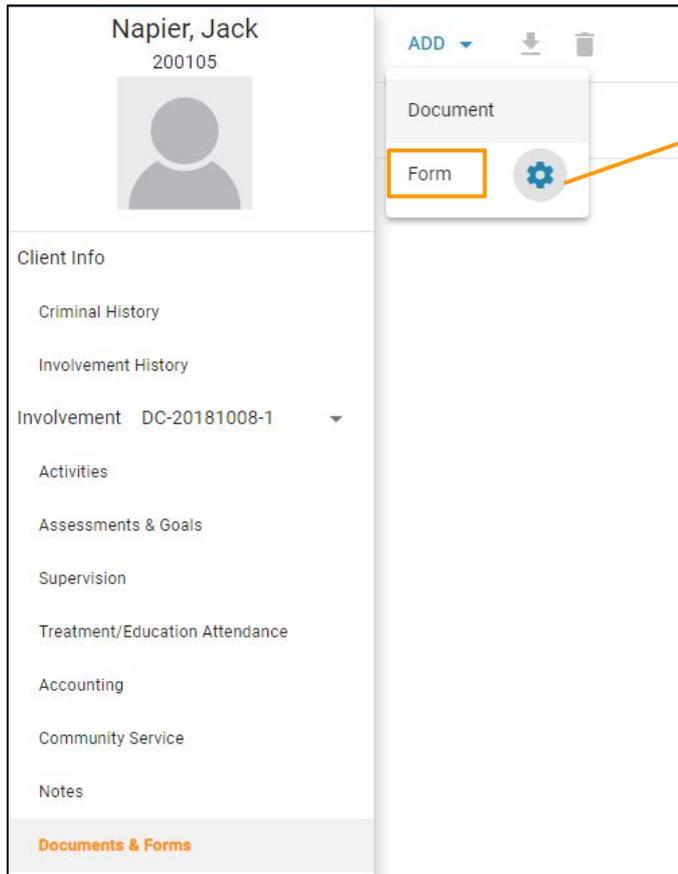


The screenshot displays the AutoMon interface for a client named Napier, Jack (ID: 200105). The left sidebar contains a navigation menu with the following items: Client Info, Criminal History, Involvement History, Involvement (DC-20181008-1), Activities, Assessments & Goals, Supervision, Treatment/Education Attendance, Accounting, Community Service, Notes, and Documents & Forms (highlighted with an orange box). The main content area shows a table with columns for File Name, File Type, File Size, Added Date, and Added By. The table is currently empty, displaying the message "No documents found". Above the table, there are controls for adding, downloading, and deleting documents.

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

# DOCUMENTS & FORMS - WORD ADD-IN

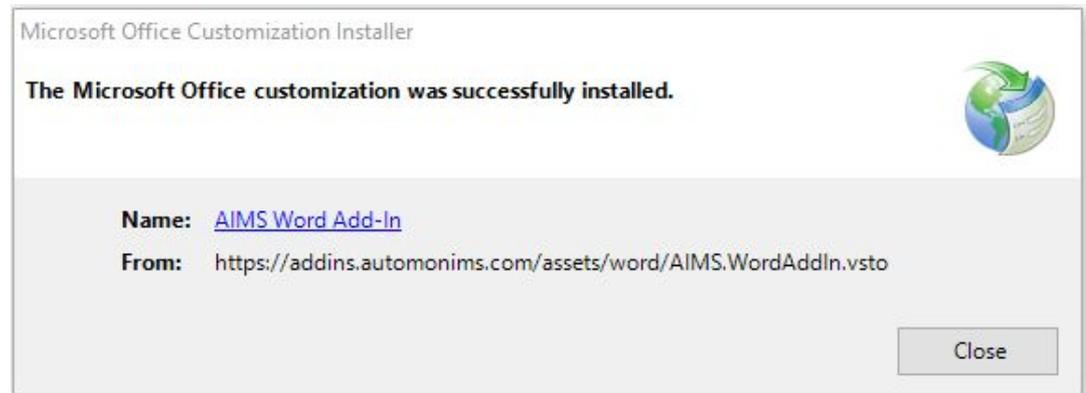
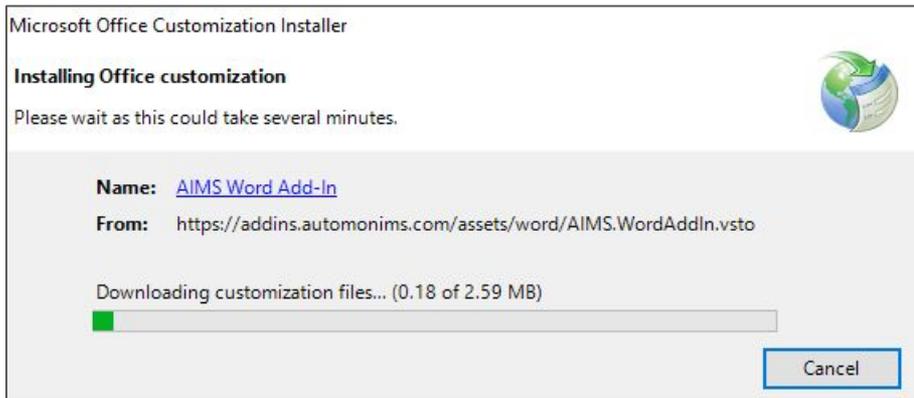
In order to create Word Templates, Users will first need to install the Word Add-In. Click on the *Add* button and then click the gear icon. Users would then click on the *Download* link. Users will see the setup.exe download on their browser.



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

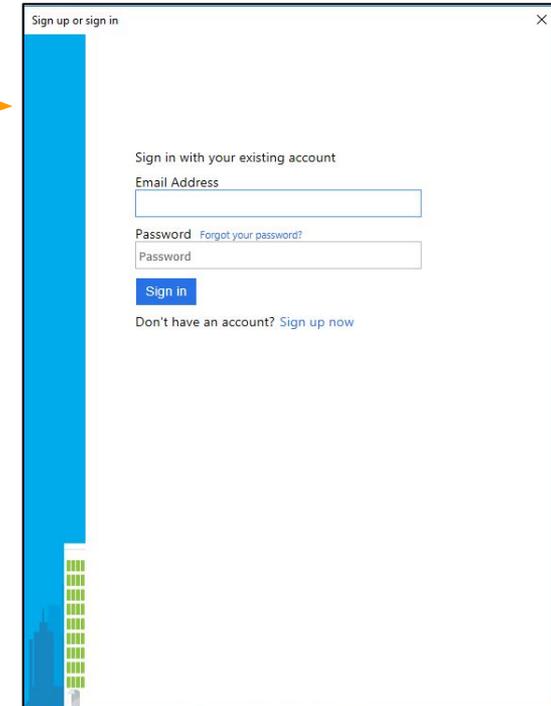
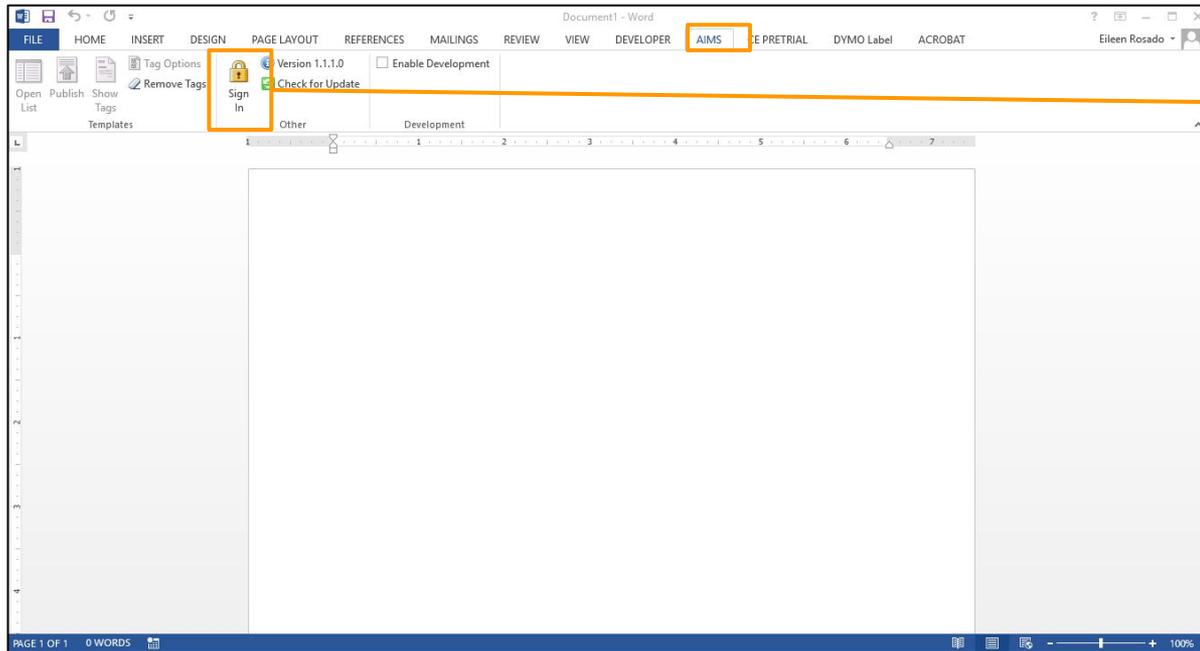
# DOCUMENTS & FORMS - WORD ADD-IN

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



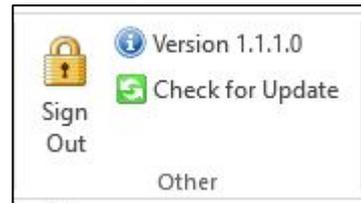
# DOCUMENTS & FORMS - MANAGING TEMPLATES

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.



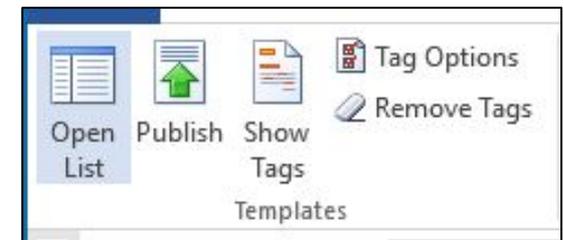
# DOCUMENTS & FORMS - MANAGING TEMPLATES

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.



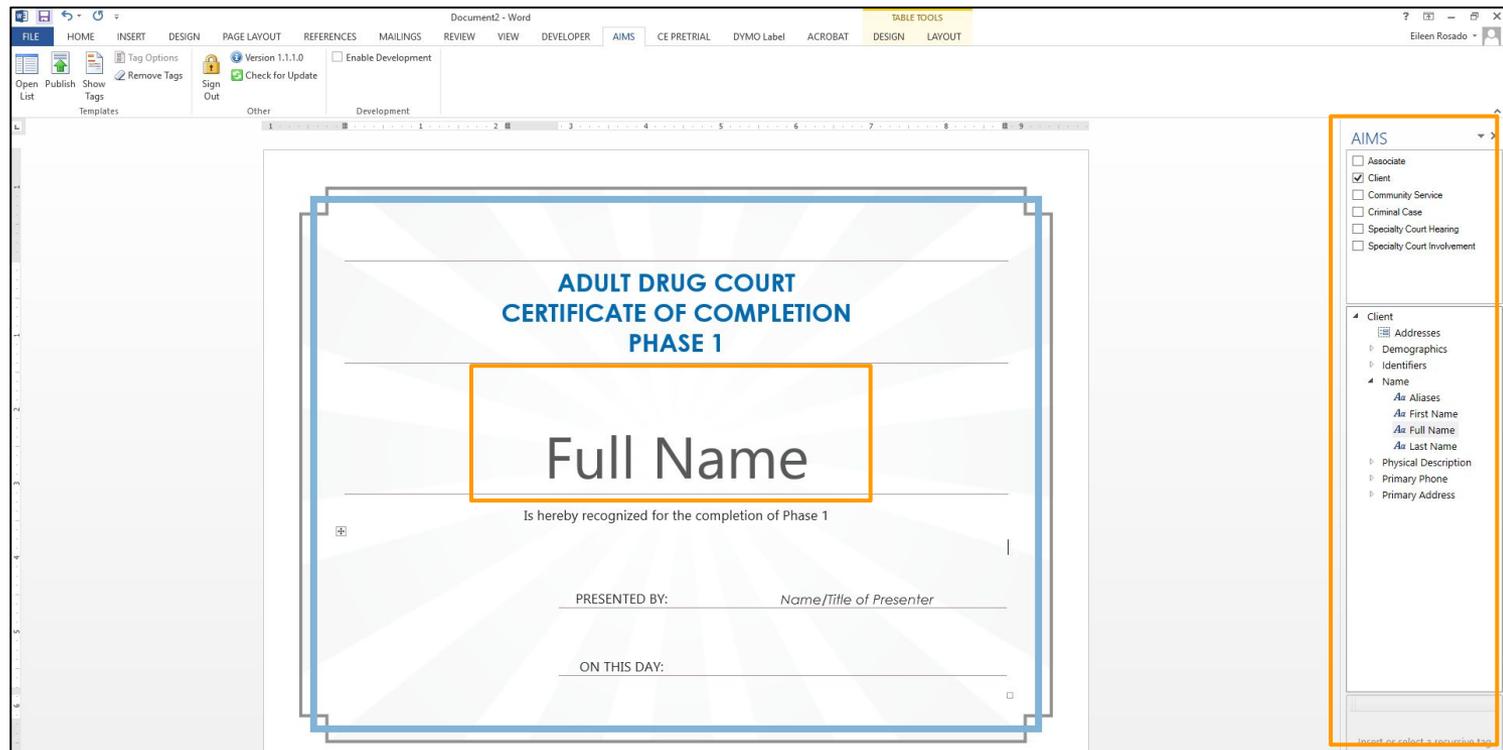
To the left of the Sign out option, Users can perform the following actions:

- **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.



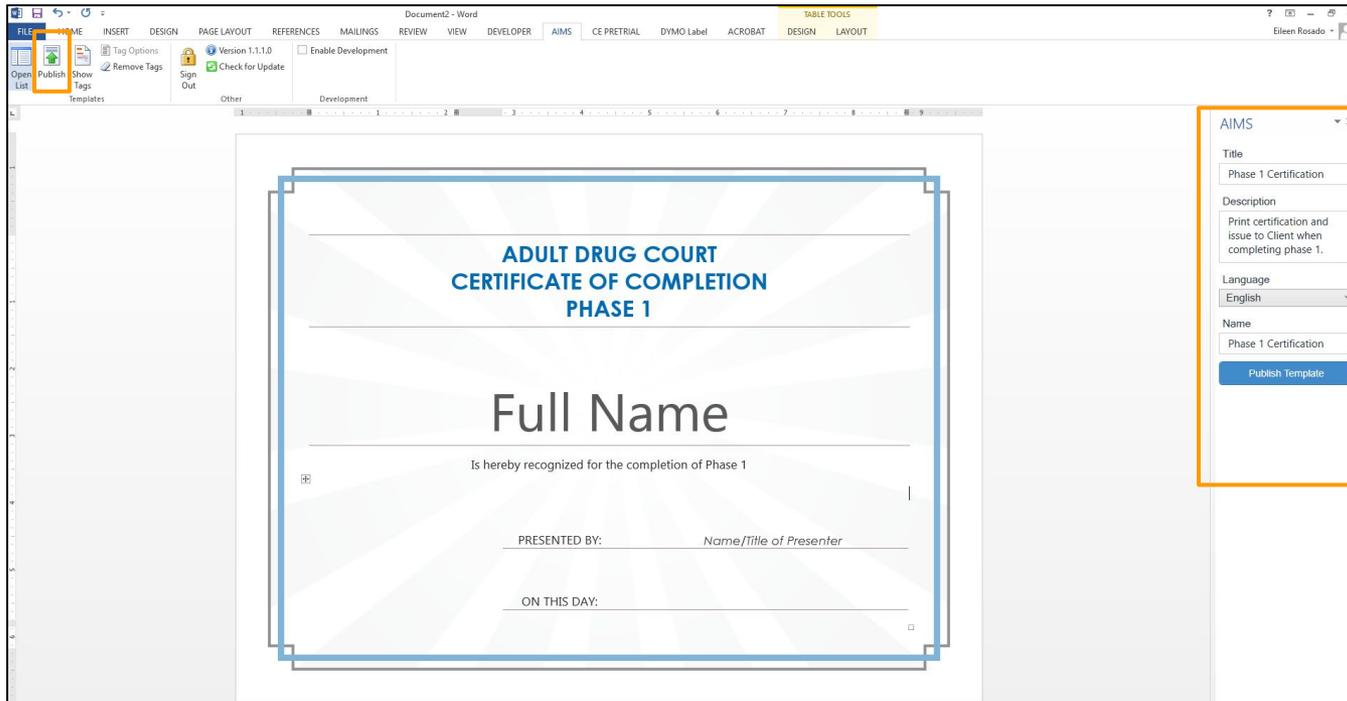
# DOCUMENTS & FORMS - MANAGING TEMPLATES

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.

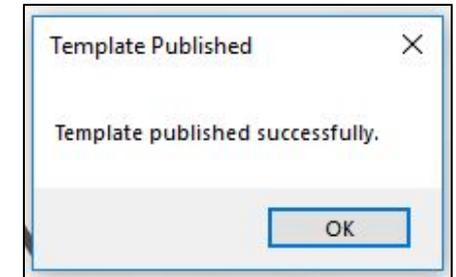


# DOCUMENTS & FORMS - MANAGING TEMPLATES

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.



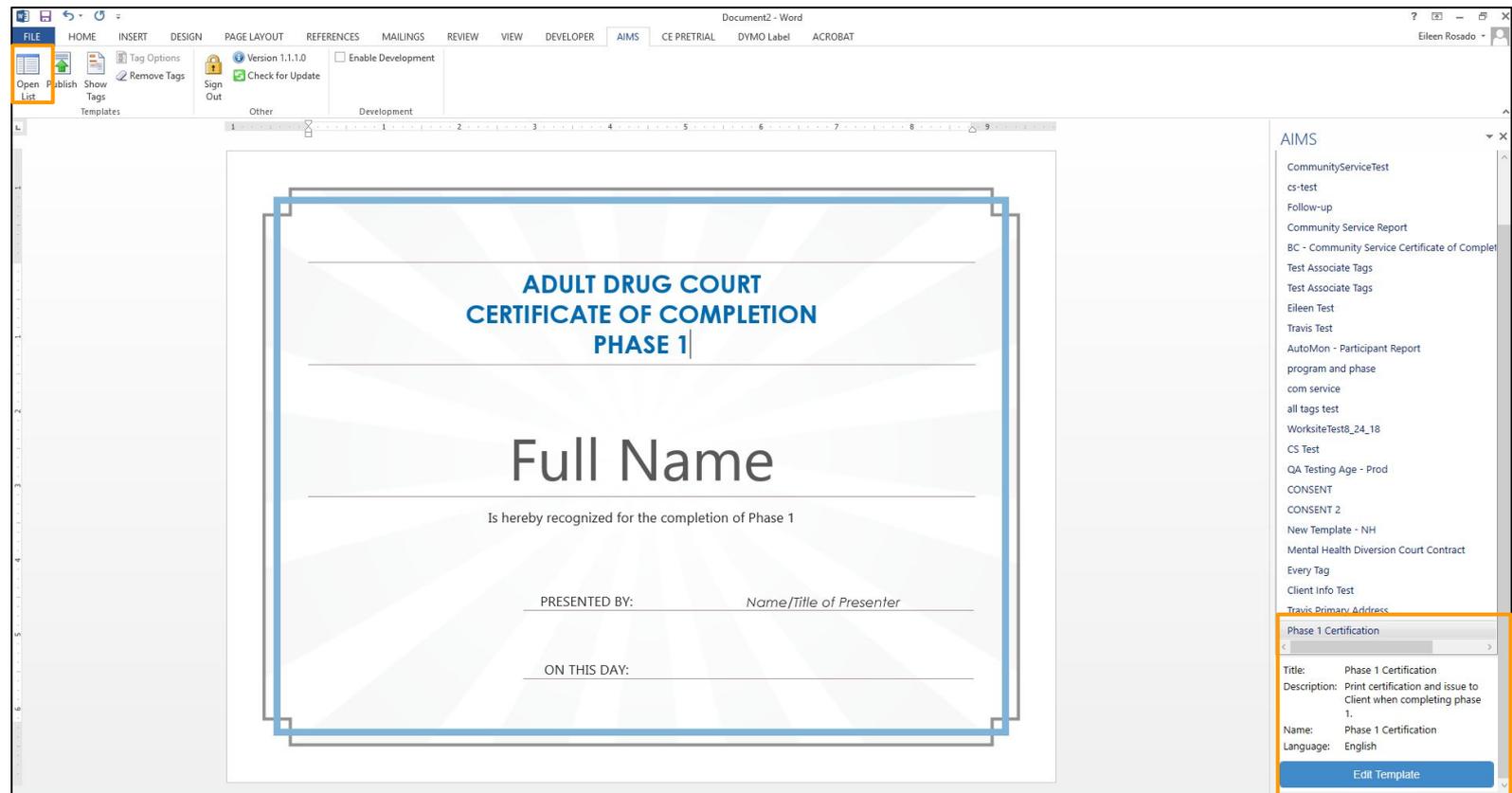
The screenshot shows a Microsoft Word document titled "Document2 - Word" with the "DESIGN" tab selected. The document content is a certificate template for "ADULT DRUG COURT CERTIFICATE OF COMPLETION PHASE 1". The certificate includes a large text field for "Full Name" and a line for "Is hereby recognized for the completion of Phase 1". Below this are fields for "PRESENTED BY:" and "ON THIS DAY:". The "Publish" icon in the "Table Tools" ribbon is highlighted with an orange box. To the right, the "AIMS" dialog box is open, showing the following fields: Title (Phase 1 Certification), Description (Print certification and issue to Client when completing phase 1.), Language (English), and Name (Phase 1 Certification). A "Publish Template" button is visible at the bottom of the dialog.



The screenshot shows a confirmation dialog box titled "Template Published" with a close button (X) in the top right corner. The message inside the dialog reads "Template published successfully." At the bottom of the dialog is an "OK" button.

# DOCUMENTS & FORMS - MANAGING TEMPLATES

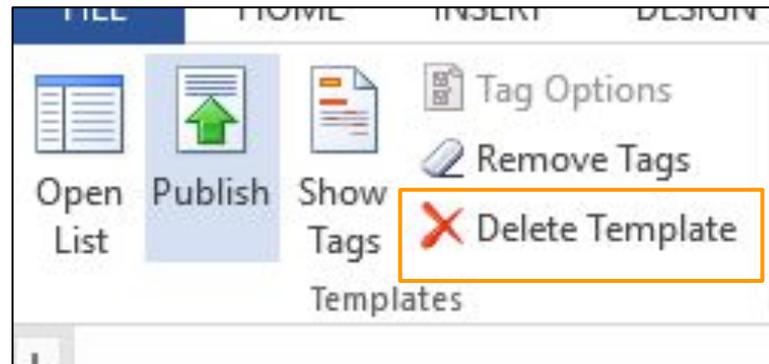
To edit a published template, click on the *Open List* option, click the template name, and then select *Edit Template*. This will open another instance of Word. You will have to log into the Add-In again (AutoMon will be addressing this in a future release). You can then make your necessary changes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



The screenshot displays the Microsoft Word interface with a certificate template open. The ribbon includes FILE, HOME, INSERT, DESIGN, PAGE LAYOUT, REFERENCES, MAILINGS, REVIEW, VIEW, DEVELOPER, and AIMS. The AIMS ribbon contains options like Open List, Publish, Show Tags, Remove Tags, Sign Out, Check for Update, and Enable Development. The certificate template features a blue border and a sunburst background. The text on the certificate reads: "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", and "ON THIS DAY:". On the right side, the AIMS pane shows a list of templates, with "Phase 1 Certification" selected and highlighted in orange. The details for "Phase 1 Certification" are shown below the list, including Title, Description, Name, and Language, with an "Edit Template" button at the bottom.

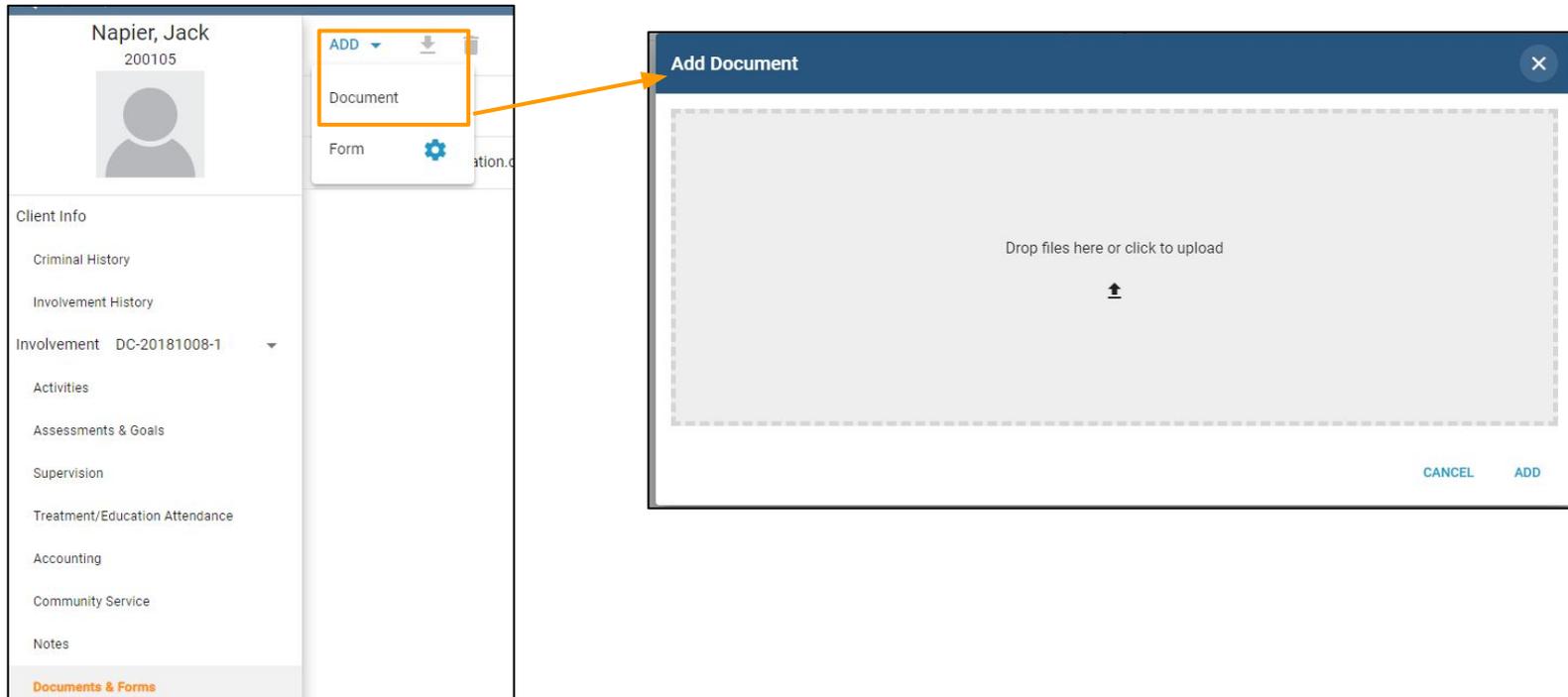
## DOCUMENTS & FORMS - MANAGING TEMPLATES

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.



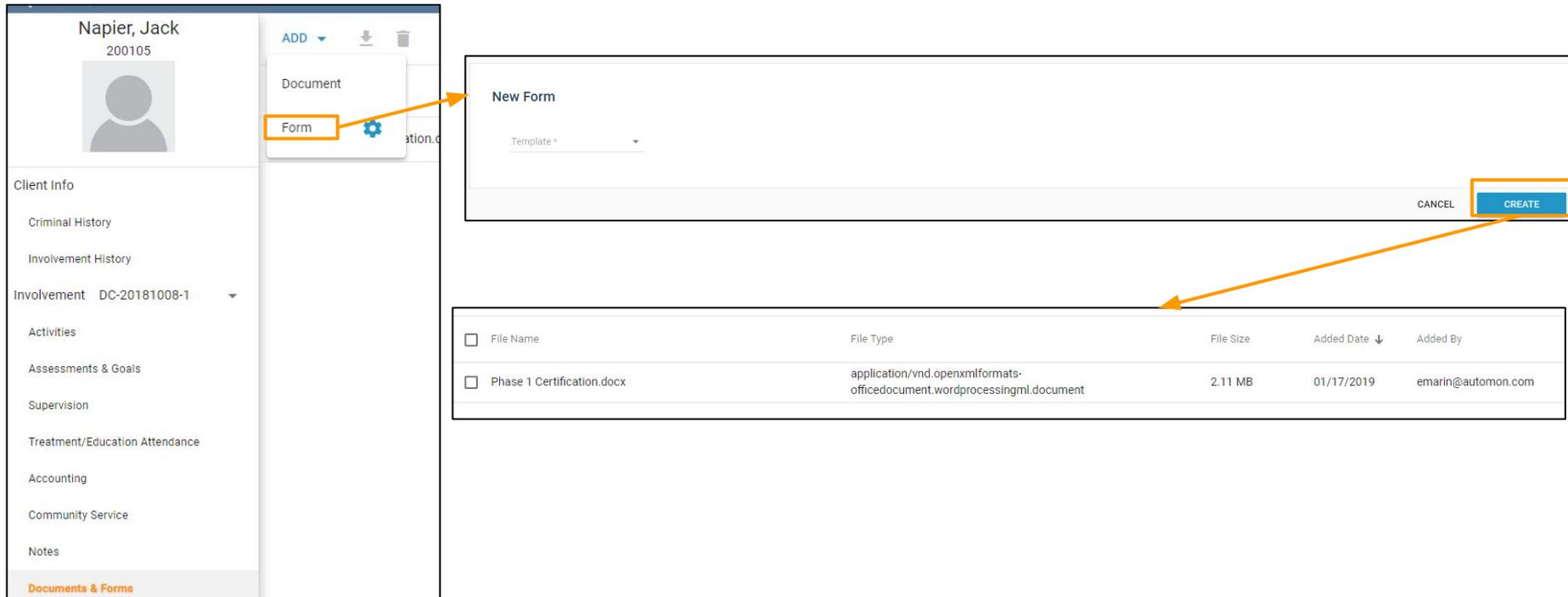
# DOCUMENTS & FORMS - ADDING DOCUMENTS

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.



The screenshot illustrates the process of generating a form for a client. On the left, the client profile for Jack Napier (ID: 200105) is visible. The 'ADD' button in the top right of the client profile is expanded, showing options for 'Document' and 'Form'. The 'Form' option is highlighted with an orange box. An arrow points from this box to the 'New Form' dialog box, which contains a 'Template' dropdown menu and 'CANCEL' and 'CREATE' buttons. The 'CREATE' button is also highlighted with an orange box. An arrow points from the 'CREATE' button to a table of documents. The table has columns for 'File Name', 'File Type', 'File Size', 'Added Date', and 'Added By'. The table contains one entry: 'Phase 1 Certification.docx' with a file type of 'application/vnd.openxmlformats-officedocument.wordprocessingml.document', a size of 2.11 MB, and a date of 01/17/2019.

<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.

<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

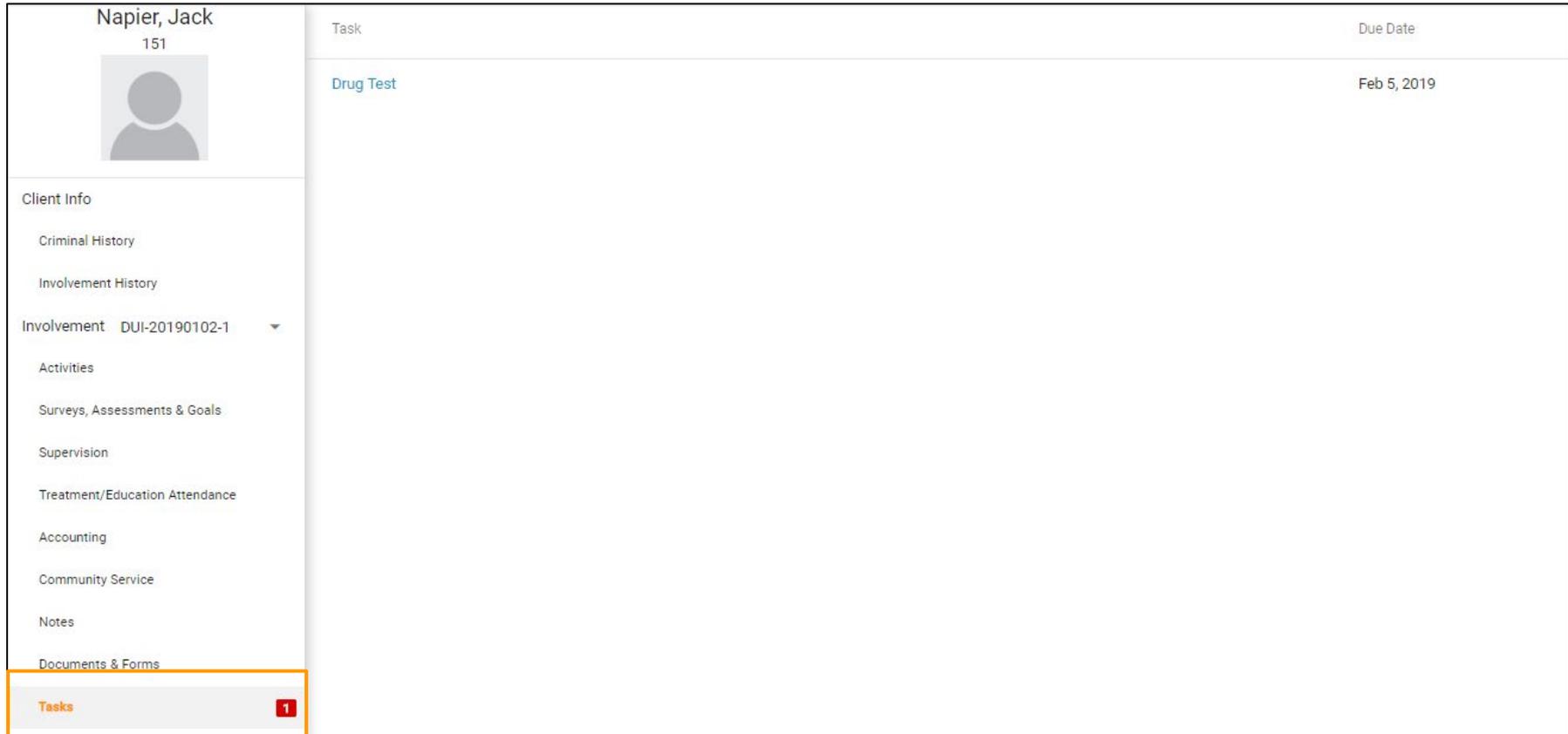
To delete a form that has been generated, Users can click on the checkbox of the form and then click on the *Trash* can icon.

<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

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



The screenshot displays the AutoMon interface for a client named Napier, Jack (ID 151). On the left, a sidebar menu lists various tabs: Client Info, Criminal History, Involvement History, Involvement (DUI-20190102-1), Activities, Surveys, Assessments & Goals, Supervision, Treatment/Education Attendance, Accounting, Community Service, Notes, Documents & Forms, and **Tasks**. The **Tasks** tab is highlighted with an orange border and a red notification badge showing the number '1'. The main content area shows a table with the following data:

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
<a href="#">Drug Test</a>	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	<a href="#">System Settings</a> ▲

 Napier, Jack  
 DUI-20190102-1

Collection Date: Feb 5, 2019

Sent for lab verification

Schedule Type: By Group: Blue Group    Scheduled By: [System Settings](#)

Outcome: \_\_\_\_\_    Testing Device: \_\_\_\_\_    Notes: \_\_\_\_\_

Specimen ID: \_\_\_\_\_

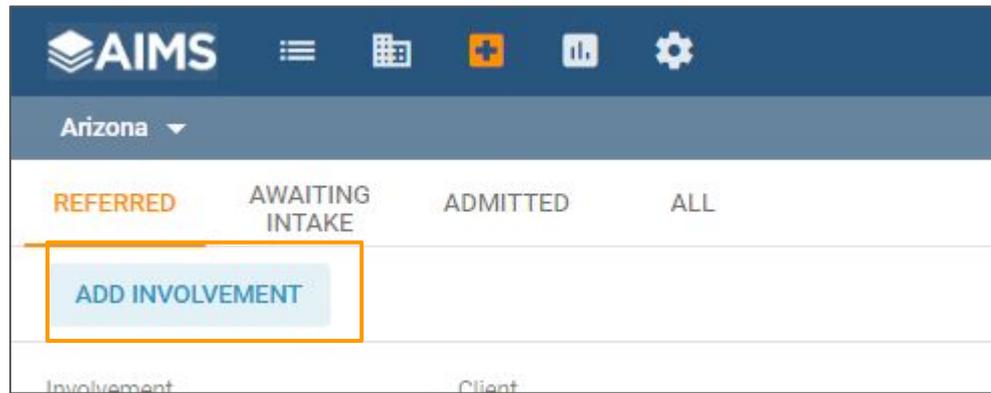
[CLOSE](#)

## Subtopics:

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

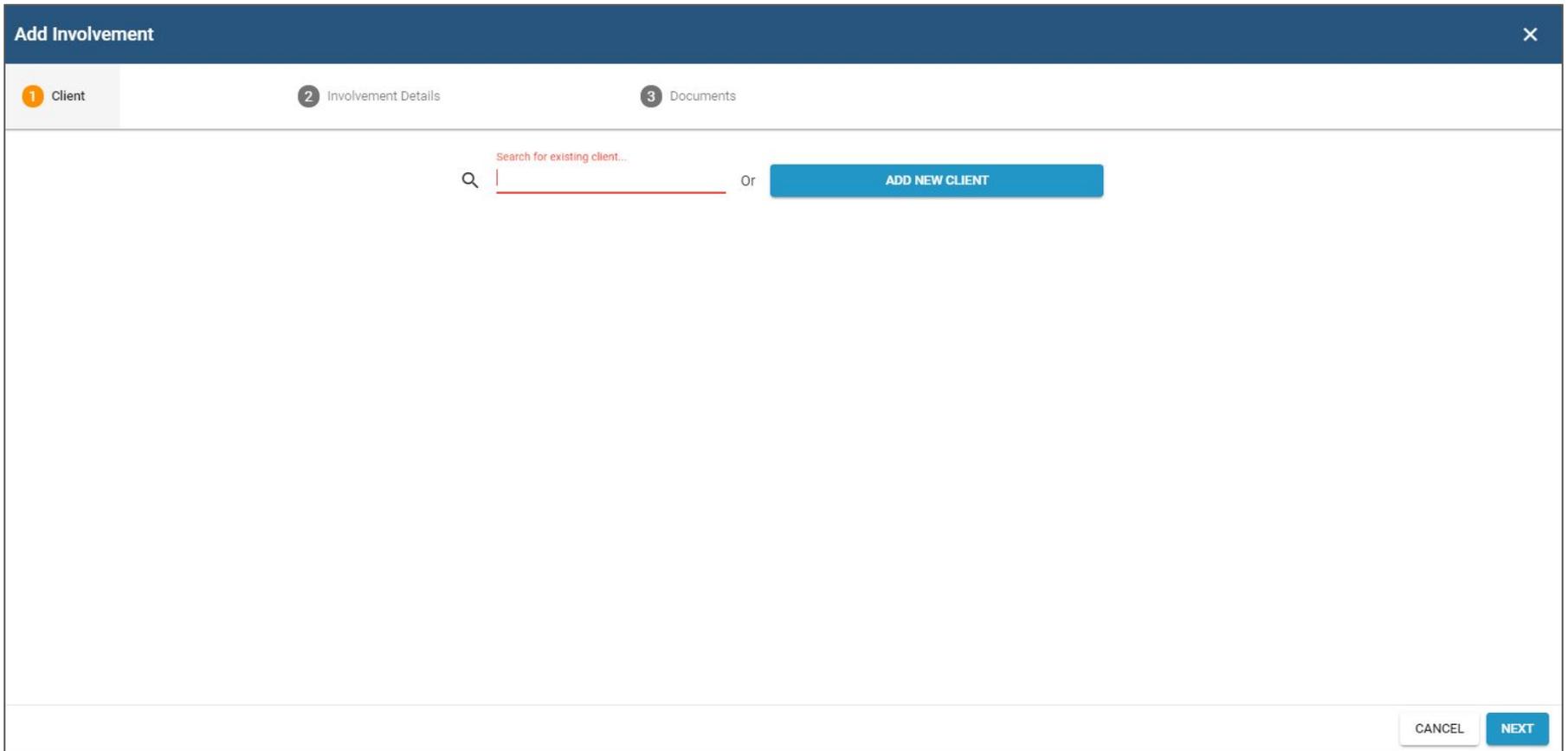
## REFERRALS - NEW REFERRAL

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

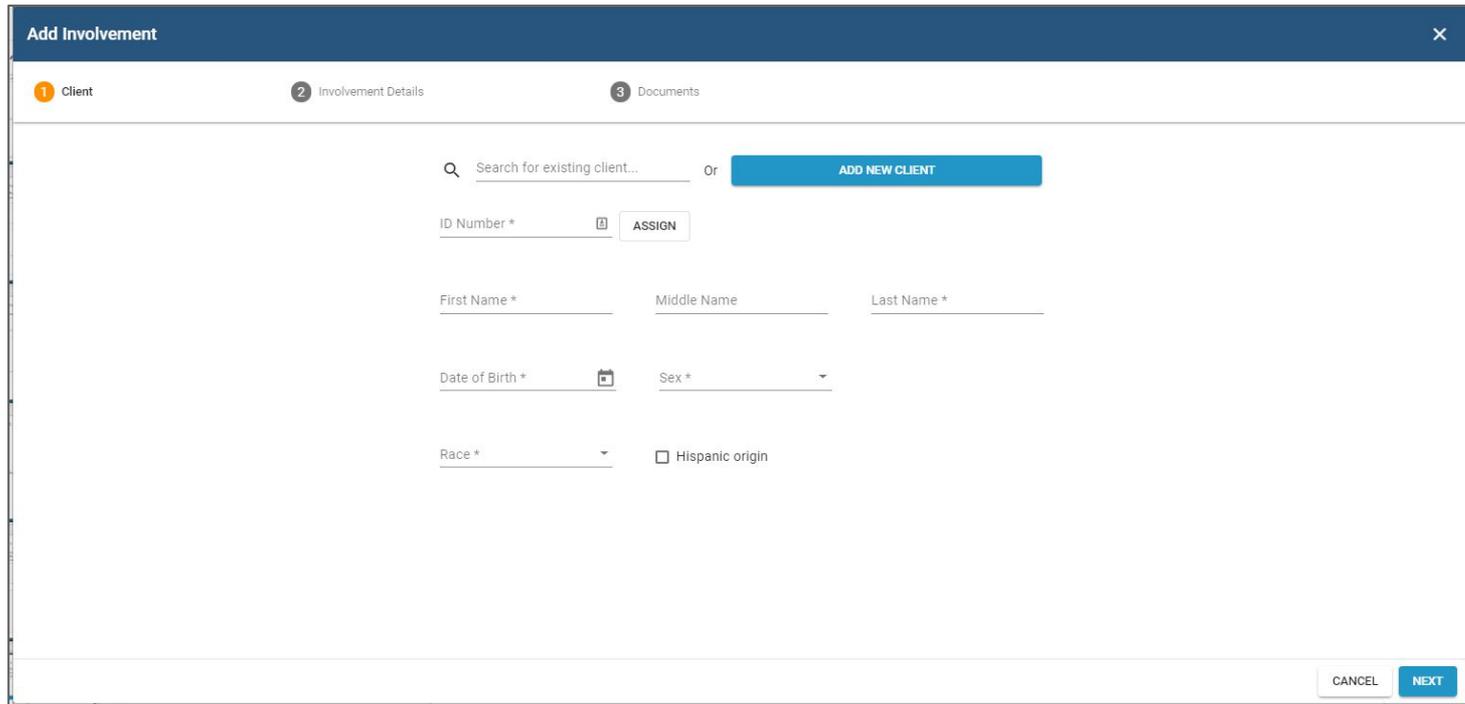
Users will first check if the client already exists in the system by typing the Client's name. If the client is not found, the User can click on the *Add New Client* button to add a new Client.



The screenshot displays the 'Add Involvement' form with three steps: 1. Client, 2. Involvement Details, and 3. Documents. The 'Client' step is active. It features a search field with a magnifying glass icon and the placeholder text 'Search for existing client...'. To the right of the search field is the word 'Or' and a blue button labeled 'ADD NEW CLIENT'. At the bottom right of the form, there are two buttons: 'CANCEL' and '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.



The screenshot shows a web application window titled "Add Involvement" with a close button (X) in the top right corner. The window has three tabs: "1 Client" (active), "2 Involvement Details", and "3 Documents". The "Client" tab contains the following form elements:

- A search bar with a magnifying glass icon and the text "Search for existing client...". To its right is the word "Or" and a blue button labeled "ADD NEW CLIENT".
- An "ID Number \*" field with a small square icon to its right and a button labeled "ASSIGN".
- Three text input fields: "First Name \*", "Middle Name", and "Last Name \*".
- A "Date of Birth \*" field with a calendar icon to its right and a "Sex \*" dropdown menu.
- A "Race \*" dropdown menu and a checkbox labeled "Hispanic origin".

At the bottom right of the form, there are two buttons: "CANCEL" and "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 ✕

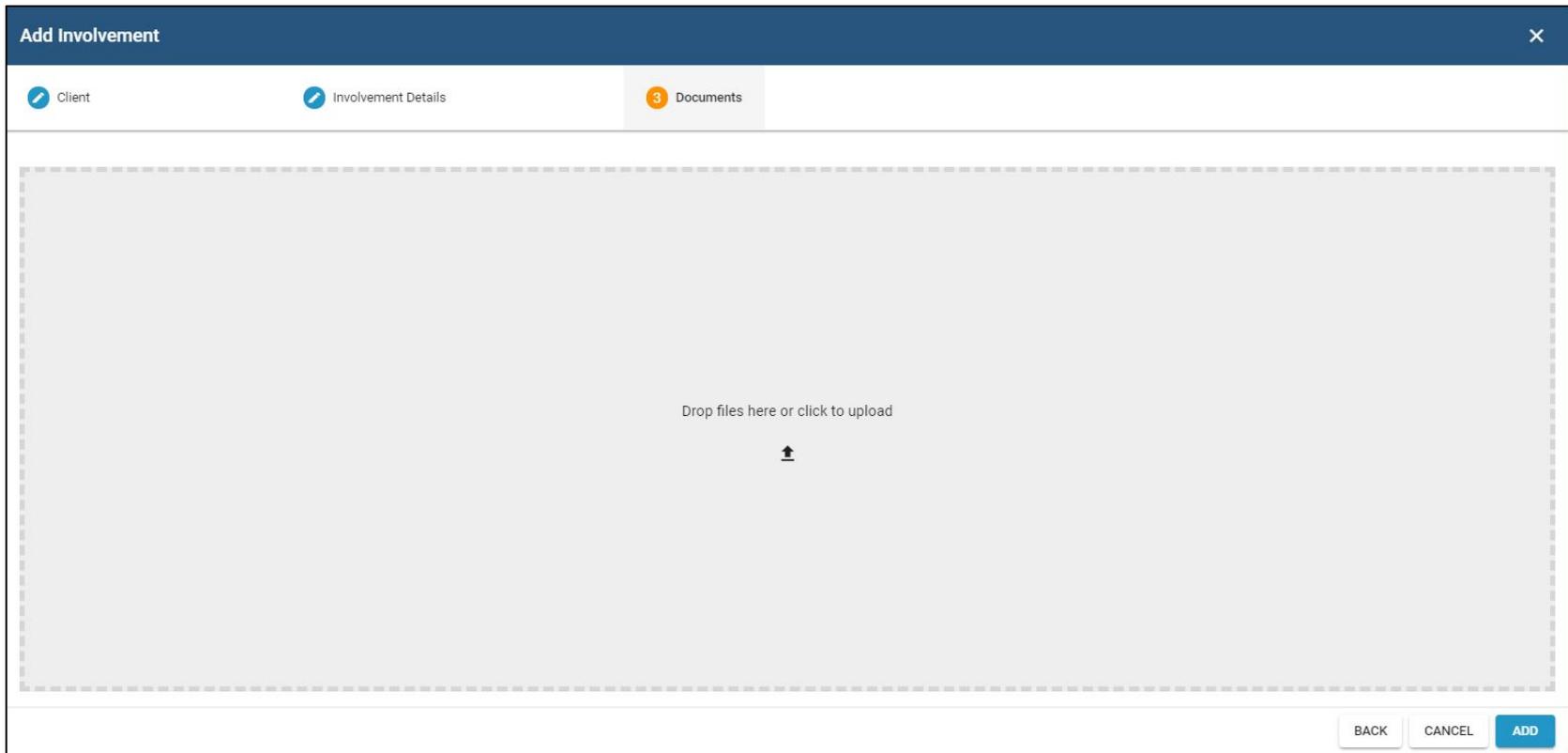
Client 2 Involvement Details 3 Documents

Referral Date *	<input type="text"/>	Court *	<input type="text"/>
Referral Source *	<input type="text"/>	Referrer Phone Number (optional)	<input type="text" value="123-456-7890"/>
Arrest Date	<input type="text"/>	Client Currently In Custody *	<input type="radio"/> Yes <input type="radio"/> 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.



The screenshot shows a modal window titled "Add Involvement" with a close button (X) in the top right corner. The window has three tabs: "Client", "Involvement Details", and "Documents". The "Documents" tab is active, indicated by an orange circle with the number "3". The main area of the dialog is a large, light gray rectangle with a dashed border, containing the text "Drop files here or click to upload" and a small upward-pointing arrow icon. At the bottom right of the dialog, there are three buttons: "BACK", "CANCEL", and "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.

**Napier, James**  
152



Arrest 01/01/2019
✓ Referral 01/09/2019
2 Approval/Denial
3 Intake

✓ APPROVE
⊘ DENY

**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 1

**Client Information**

DOB	Age	Sex
01/17/1981	38	Male
Race	Hispanic Origin	
Unknown	No	

**Referral Details**

Court	Days Since Referral	
Drug Court 1	8	
Referral Source	In Custody	Phone Number
Scottsdale Police Department	No	None

**Assessments** ADD ASSESSMENT ▾

No assessments.

**Documents** ADD DOCUMENT

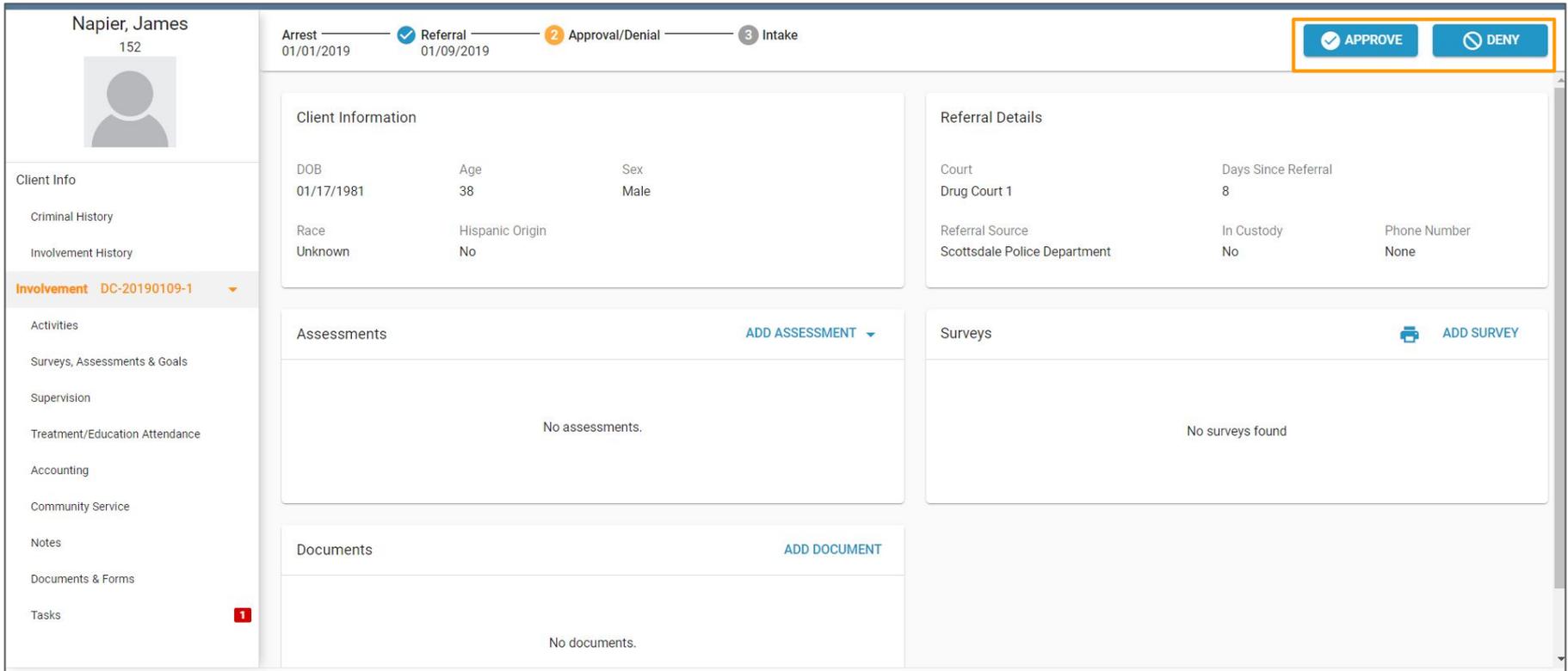
No documents.

**Surveys** ADD SURVEY

No surveys found

# REFERRALS - INVOLVEMENT REFERRAL VIEW

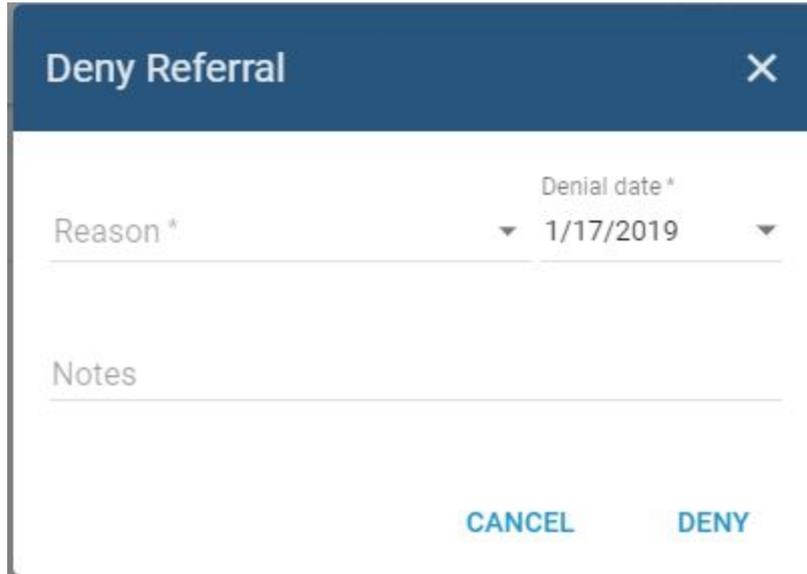
This view allows the User to have quick access to enter additional Client information, such as address, phone, etc., as well as add the criminal case that is tied to the Referral. The User can also add an assessment, survey, or a document. Once all necessary functions have been performed, the User can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



The screenshot displays the 'Referral View' for a client named James Napier (ID: 152). The interface includes a navigation sidebar on the left with categories like Client Info, Criminal History, and Involvement. The main content area shows a progress bar at the top with steps: Arrest (01/01/2019), Referral (01/09/2019), Approval/Denial (current step), and Intake. Two buttons, 'APPROVE' and 'DENY', are highlighted in an orange box. Below the progress bar are four panels: 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 (No assessments), and Surveys (No surveys found). At the bottom, there is a Documents panel (No documents) and a Tasks panel (1 task).

## REFERRALS - DENYING REFERRALS

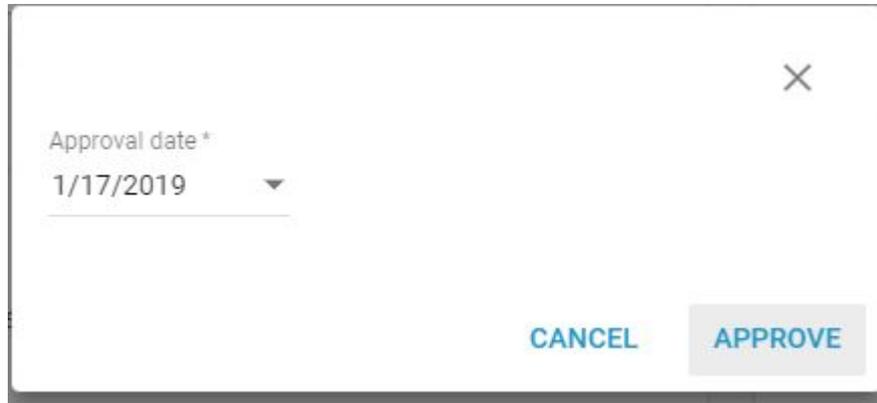
When the Referral is being denied, the User will be prompted to enter a reason, indicate the denial date (must be after the referral date), and add additional notes, if necessary.



The image shows a modal dialog box titled "Deny Referral" with a close button (X) in the top right corner. The dialog contains two main input fields: "Reason \*" and "Denial date \*". The "Denial date \*" field is a date picker currently showing "1/17/2019". Below these fields is a "Notes" text area. At the bottom of the dialog, there are two buttons: "CANCEL" and "DENY".

## REFERRALS - APPROVING REFERRALS

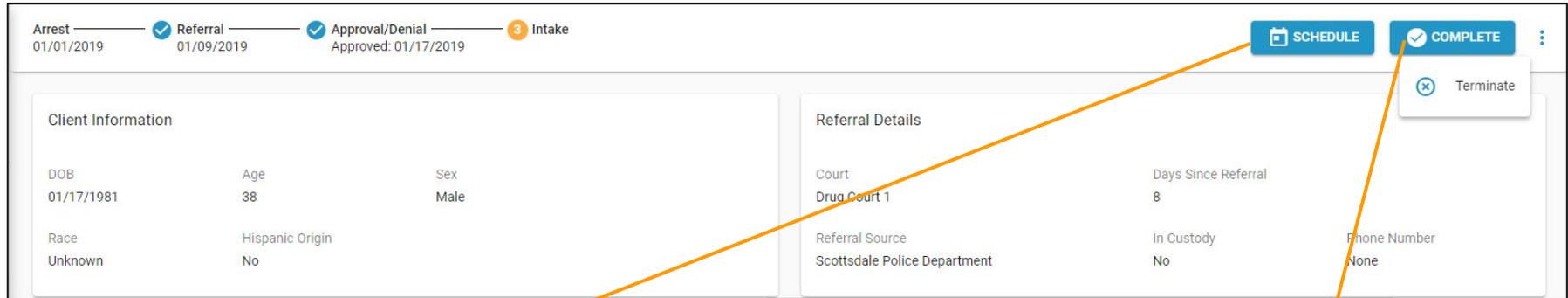
When the referral is being approved, the User is prompted to enter an approval date (must be after the referral date). Once the Client has been approved, the User will complete the intake steps next.



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

# REFERRALS - COMPLETING INTAKES

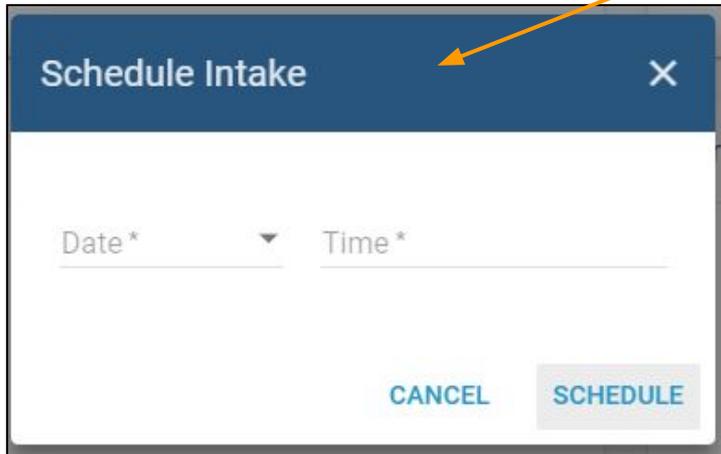
Once the referral has been approved, the User will then have several Intake options. The Involvement view will reflect that the Client is in the Intake Phase. The User can either schedule the Intake completion or complete the Intake immediately. When completing the Intake, the User is required to select 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.



Arrest: 01/01/2019 | Referral: 01/09/2019 | Approval/Denial: Approved: 01/17/2019 | Intake: 3

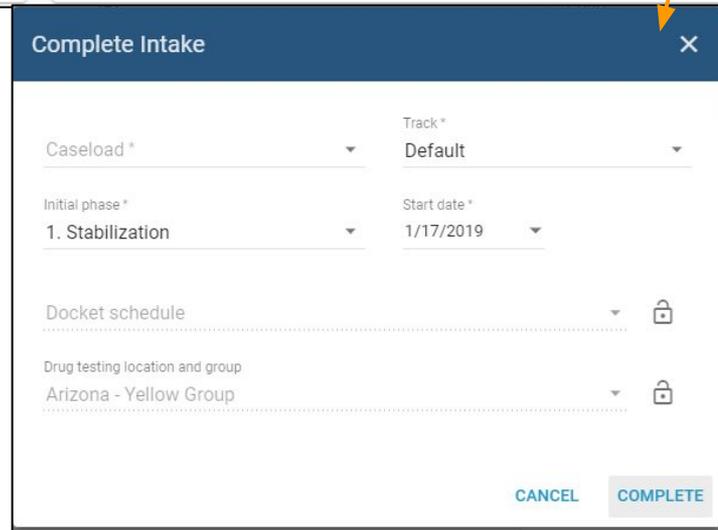
Client Information			Referral Details		
DOB	Age	Sex	Court	Days Since Referral	
01/17/1981	38	Male	Drug Court 1	8	
Race	Hispanic Origin		Referral Source	In Custody	Phone Number
Unknown	No		Scottsdale Police Department	No	None

Actions: SCHEDULE, COMPLETE, Terminate



### Schedule Intake

Date\*  Time\*



### Complete Intake

Caseload\*  Track\*

Initial phase\*  Start date\*

Docket schedule

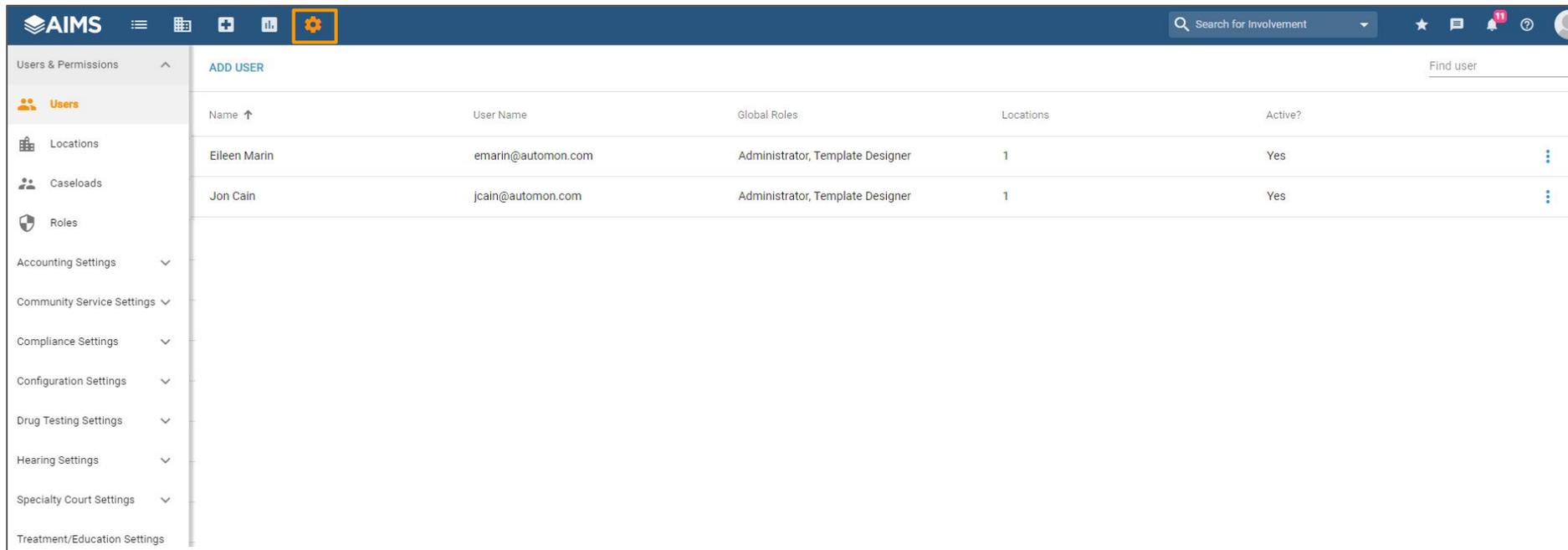
Drug testing location and group

## 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.

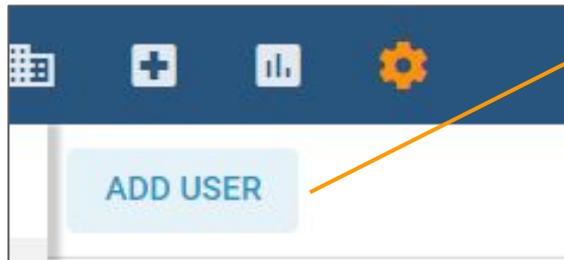


The screenshot displays the AIMS system interface. The top navigation bar includes the AIMS logo, a search bar for 'Involvement', and a settings icon (gear) highlighted with an orange box. The left sidebar shows a menu with 'Users & Permissions' expanded, and 'Users' selected. The main content area shows a table of users with the following data:

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

First name \* Eileen      Last name \* Marin

User name \* emarin@automon.com       Active

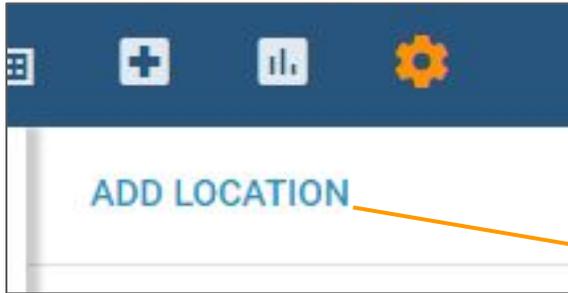
Role *	Location *	
Full Access	Arizona > Maricopa > Phoenix > Drug Court	—
Role *	Location	
Template Designer	Arizona	—
Role *	Location *	
Read-Only	Arizona > Maricopa > Scottsdale > Drug Court	—

[+ 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 ✕

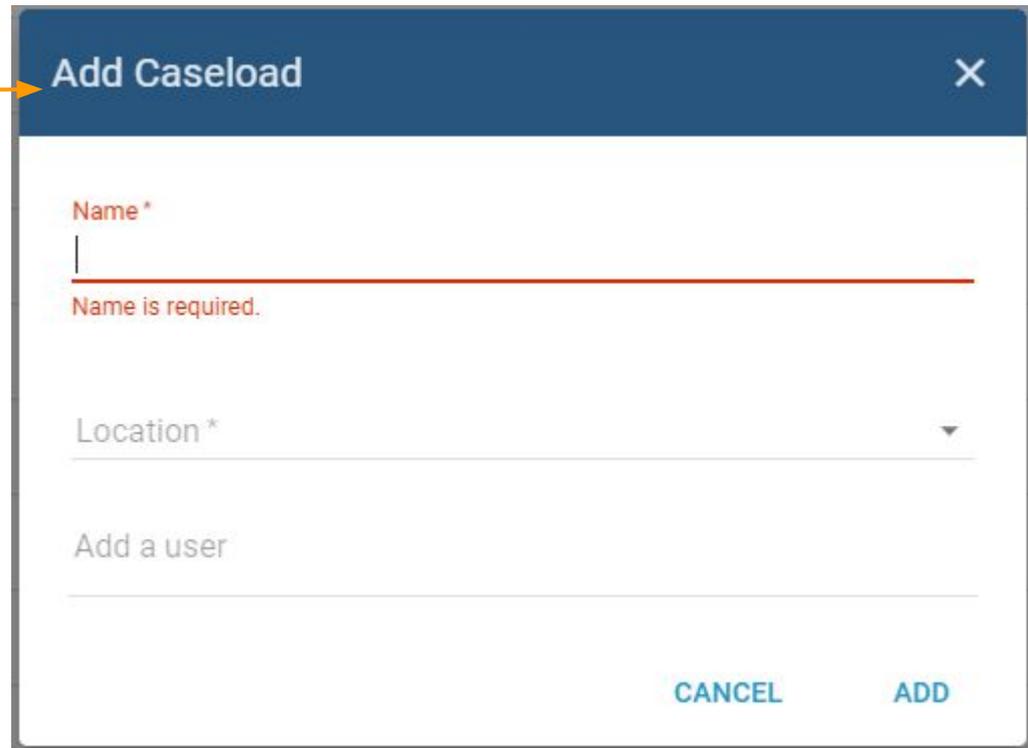
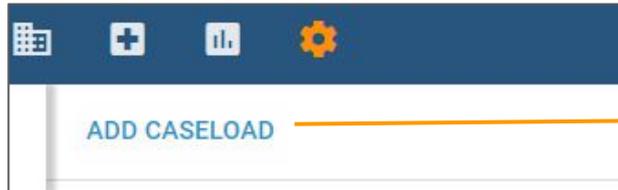
Parent Location \*  
Arizona > Maricopa > Phoenix > Drug Court

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.



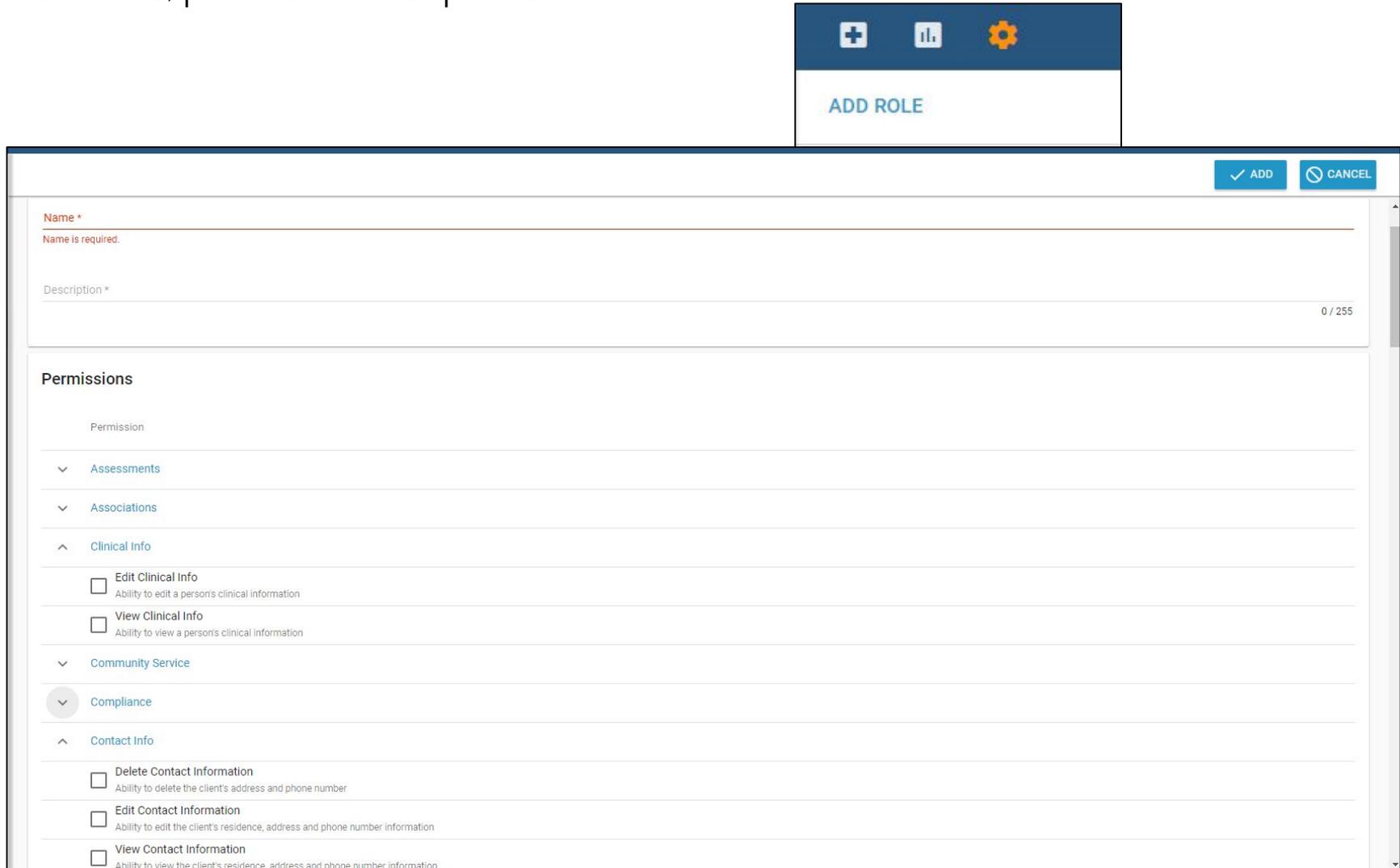
A screenshot of the 'Add Caseload' dialog box. The dialog has a dark blue header with the title 'Add Caseload' and a close button (X). The main area is white and contains the following fields:

- Name \***: A text input field with a red border and a red error message below it: 'Name is required.'
- Location \***: A dropdown menu with a downward arrow.
- Add a user**: A text input field.

At the bottom right of the dialog, there are two buttons: 'CANCEL' and 'ADD'.

# ADMINISTRATION - USERS & PERMISSIONS

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

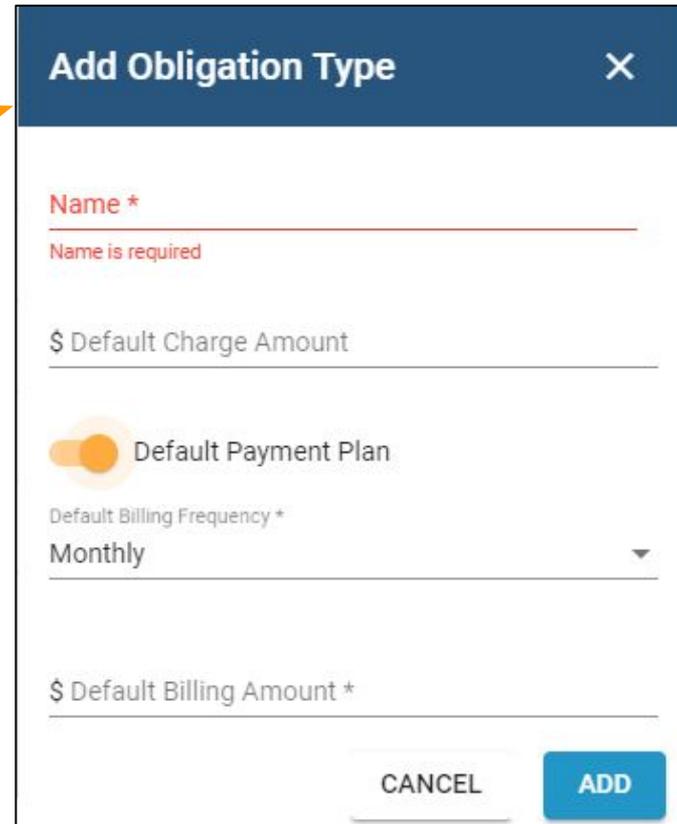
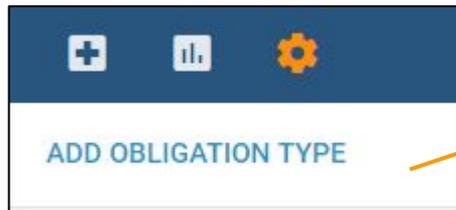


The screenshot shows a modal window titled "ADD ROLE". At the top right of the modal are two buttons: "ADD" (with a checkmark icon) and "CANCEL" (with a circular arrow icon). The form contains the following elements:

- Name \***: A text input field with a red error message "Name is required." below it.
- Description \***: A text input field with a character count "0 / 255" on the right side.
- Permissions**: A section with a title and a list of permission categories, each with a dropdown arrow and a list of items with checkboxes:
  - Assessments**: No items listed.
  - Associations**: No items listed.
  - 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**: No items listed.
  - Compliance**: No items listed.
  - 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.



A modal form titled "Add Obligation Type" 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 error message "Name is required" below it.
- \$ Default Charge Amount**: A text input field.
- Default Payment Plan**: A toggle switch that is currently turned on (orange).
- Default Billing Frequency \***: A dropdown menu with "Monthly" selected.
- \$ Default Billing Amount \***: A text input field.

At the bottom right of the form are two buttons: "CANCEL" (light blue) and "ADD" (dark blue).

# 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

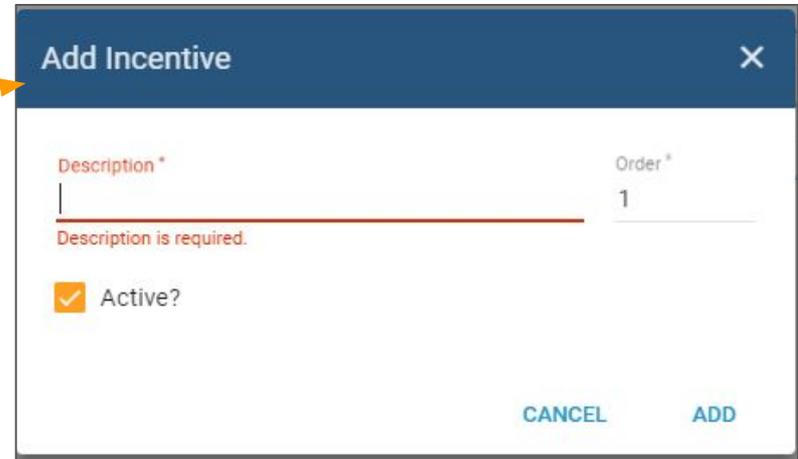
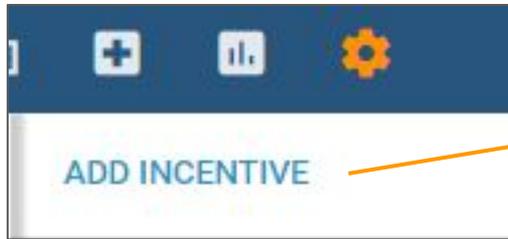
Name

Email

Phone Ext.

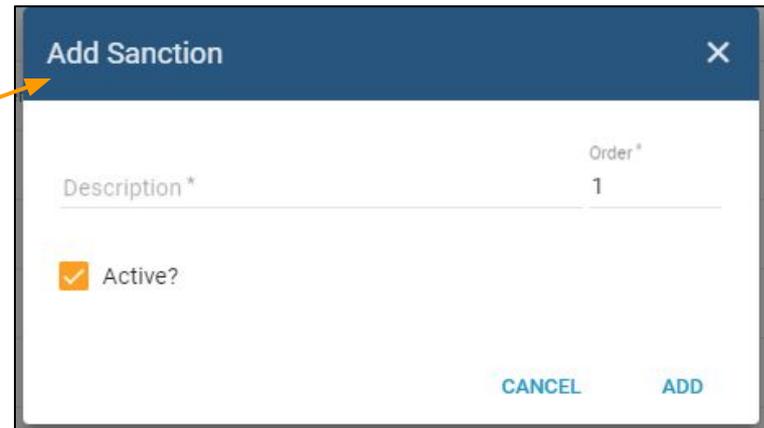
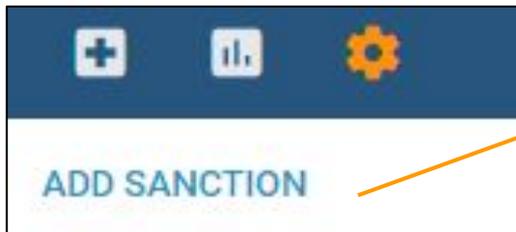
# ADMINISTRATION - COMPLIANCE SETTINGS

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.



# 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 a dialog box titled "Add Sanction" with a close button (X) in the top right corner. The dialog contains a form with a "Description\*" field and an "Order\*" field set to "1". Below the form is a checked checkbox labeled "Active?". At the bottom right, there are two buttons: "CANCEL" and "ADD".



A screenshot of a dialog box titled "Edit Sanction" with a close button (X) in the top right corner. The dialog contains a form with a "Description\*" field containing the text "Reprimand" and an "Order\*" field set to "1". Below the form is a checked checkbox labeled "Active?". At the bottom right, there are two buttons: "CANCEL" and "SAVE".

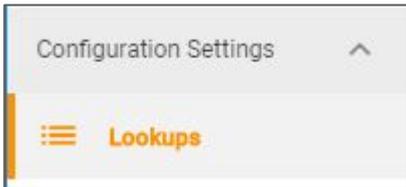
# COMPLIANCE SETTINGS - SANCTIONS MATRIX

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

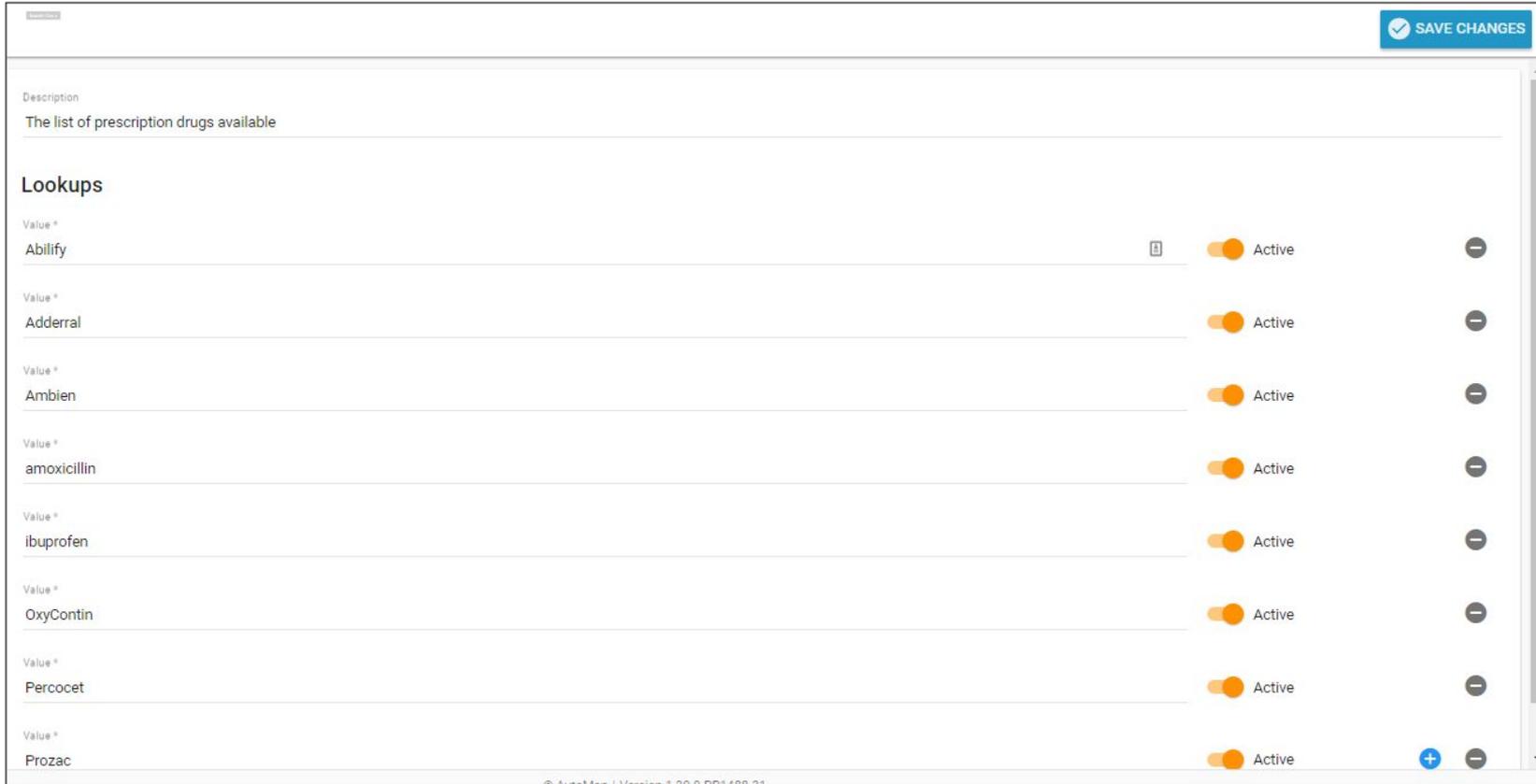
Admins can add additional details to Lookups, such as the list of allergies, Community Service worksite restrictions, drug of choice list, prescription drug list, etc. Clicking on the *Lookup* hyperlink will allow the admin add to the Lookup list for that specific Lookup item.



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



The screenshot displays the configuration settings for a lookup list. At the top right, there is a blue button labeled "SAVE CHANGES" with a checkmark icon. Below this, the "Description" field contains the text "The list of prescription drugs available". The main section is titled "Lookups" and contains a table of drug names. Each row includes a "Value \*" label, the drug name, a small icon, a toggle switch labeled "Active", and a minus sign icon. At the bottom right of the table, there is a blue plus sign icon and a minus sign icon. The footer of the interface shows the copyright notice "© AutoMon | Version 1.20.0 DD1488-23".

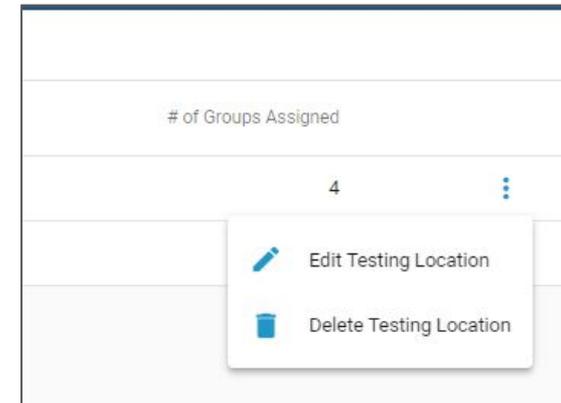
Value *	Active
Abilify	Active
Adderall	Active
Ambien	Active
amoxicillin	Active
ibuprofen	Active
OxyContin	Active
Percocet	Active
Prozac	Active

# 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.

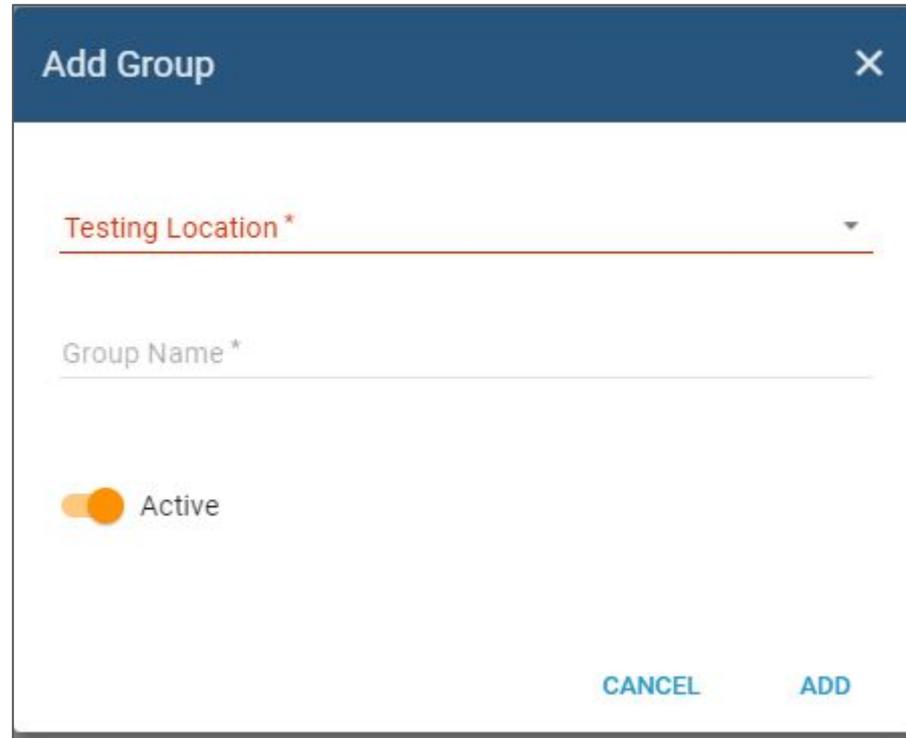
ADD TESTING LOCATIONS				
Name ↑	Security Location	Phone Number	AutoMon IVR	# of Groups Assigned
Arizona	Arizona	480-360-0437	Yes	4
Testing Place	Arizona		No	0

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.

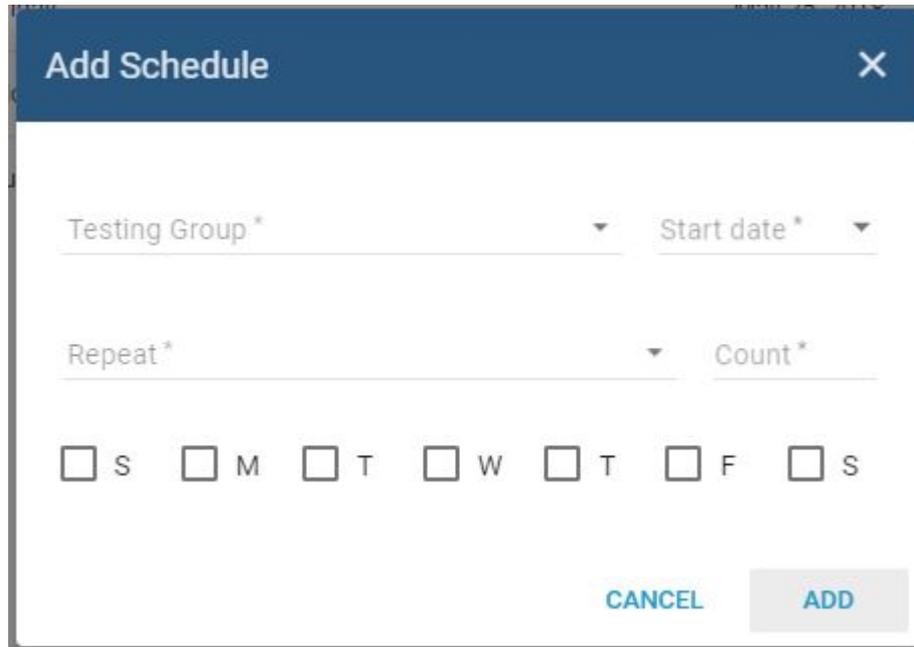
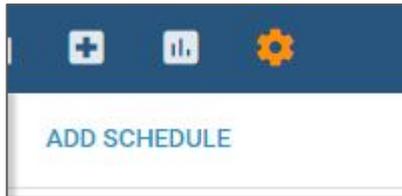


A screenshot of a modal window titled "Add Group" with a close button (X) in the top right corner. The form contains the following fields and controls:

- A dropdown menu labeled "Testing Location \*" with a red underline.
- A text input field labeled "Group Name \*".
- A toggle switch labeled "Active", which is currently turned on (orange).
- Two buttons at the bottom right: "CANCEL" and "ADD", both in blue.

# 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.

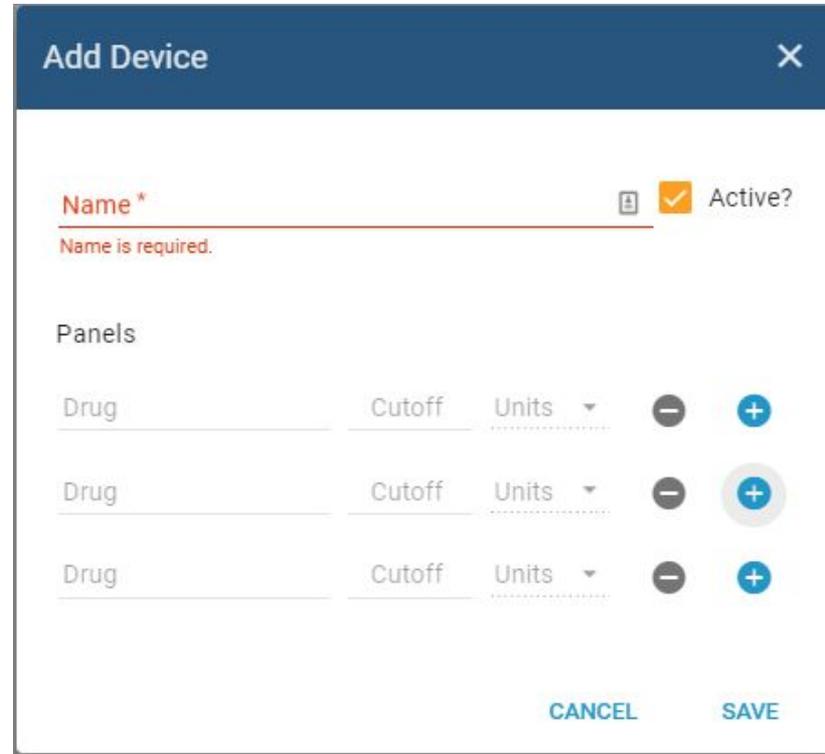


The "Add Schedule" dialog box features a dark blue title bar with a close button (X). The main area is white and contains the following elements:

- Testing Group \***: A dropdown menu.
- Start date \***: A date selection field.
- Repeat \***: A dropdown menu.
- Count \***: A numeric input field.
- Weekly Schedule**: A row of seven checkboxes labeled S, M, T, W, T, F, S.
- Buttons**: "CANCEL" and "ADD" buttons at the bottom right.

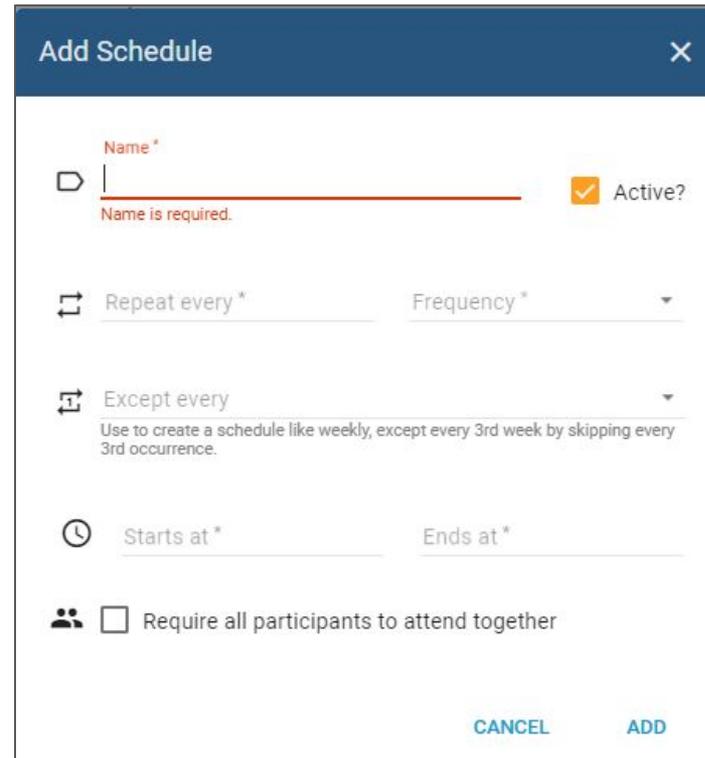
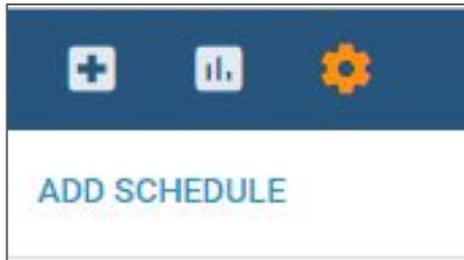
# ADMINISTRATION - DRUG TESTING SETTINGS

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.

A screenshot of the "Add Device" form. The form has a dark blue header with the title "Add Device" and a close button. Below the header is a "Name" field with a red asterisk and a lock icon, followed by an "Active?" checkbox which is checked. A red error message "Name is required." is displayed below the name field. The "Panels" section contains three rows, each with a "Drug" input field, a "Cutoff" input field, a "Units" dropdown menu, and two circular buttons: a minus sign and a plus sign. The plus sign button in the second row is highlighted. At the bottom right of the form are "CANCEL" and "SAVE" buttons.

## 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.

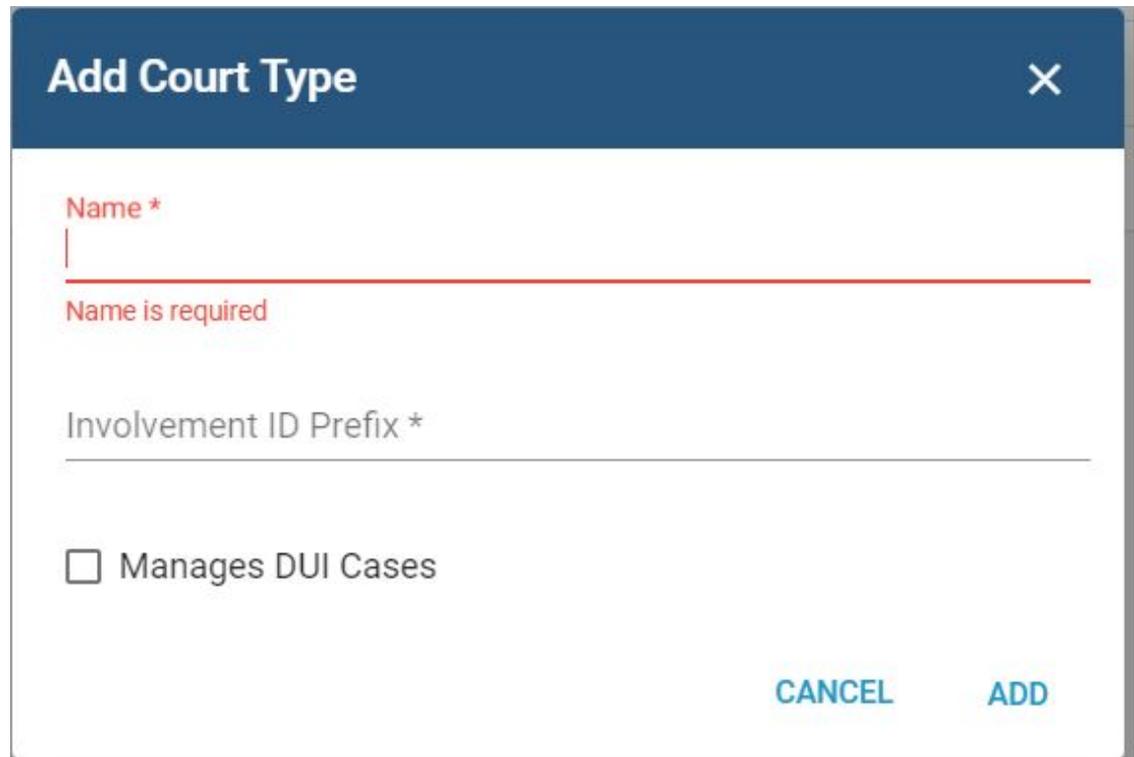
A screenshot of a modal window titled "Add Schedule" with a close button (X) in the top right corner. The form contains the following fields and options:

- Name \***: A text input field with a red underline and the error message "Name is required." to its right. A checkbox labeled "Active?" is checked.
- Repeat every \***: A text input field.
- Frequency \***: A dropdown menu.
- Except every**: A dropdown menu with the text "Use to create a schedule like weekly, except every 3rd week by skipping every 3rd occurrence." below it.
- Starts at \***: A text input field.
- Ends at \***: A text input field.
- Require all participants to attend together**: A checkbox that is currently unchecked.

At the bottom right of the form are two buttons: "CANCEL" and "ADD".

## 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.

A modal window titled "Add Court Type" with a close button (X) in the top right corner. The form contains three fields: "Name \*" with a red error message "Name is required" below it; "Involvement ID Prefix \*" with a red error message "Name is required" below it; and a checkbox labeled "Manages DUI Cases". At the bottom right are two buttons: "CANCEL" and "ADD".

**Add Court Type** [X]

Name \*  
|  
Name is required

Involvement ID Prefix \*  
|  
Name is required

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 \*

# ADMINISTRATION - SPECIALTY COURT SETTINGS

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

Name	Judge	Location	Court Type
<a href="#">Drug Court 1</a>		Arizona	Drug Court
<a href="#">DUI Court 1</a>		Arizona	DUI Court
<a href="#">Mental Health Court 1</a>		Arizona	Mental Health Court
<a href="#">Veterans Court 1</a>		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

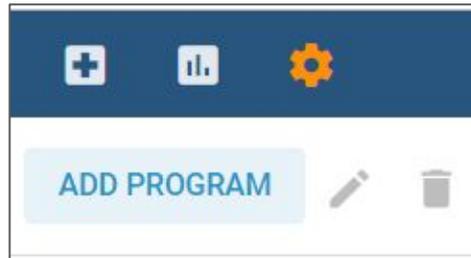
Below the Phase details are the Milestones for the Phase. Admins can click on the blue + button to add additional Milestones.

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*.

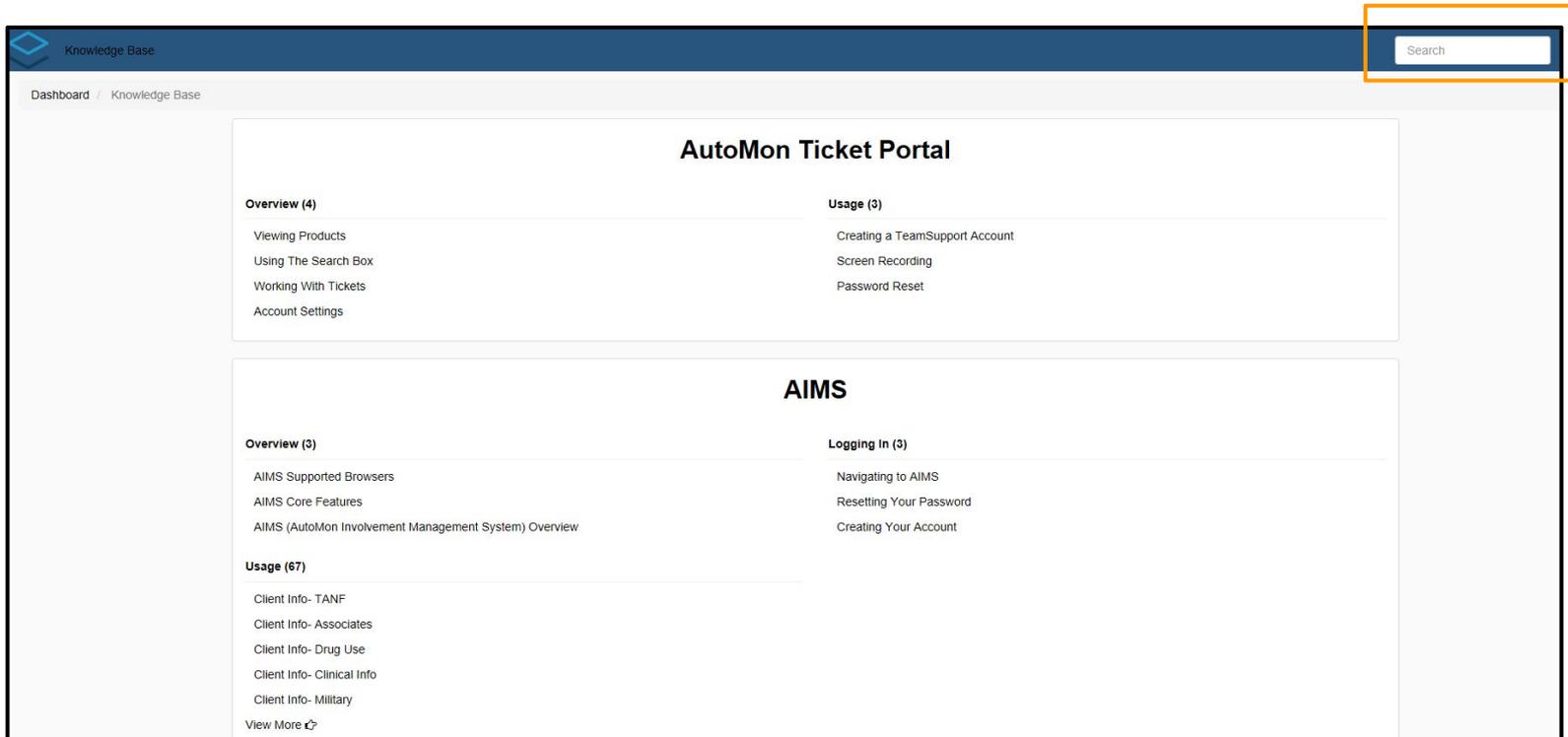
ADD PROGRAM  				Show Inactive <input type="checkbox"/>	
Program ↑	Active	Enrollments	Assigned Security Locations		
<input checked="" type="checkbox"/> Generic Recovery Program	Yes	114	9	▼	
<input type="checkbox"/> Helping Hands Rehab	Yes	0	1	▼	

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.



The screenshot displays the AutoMon Knowledge Base interface. At the top right, a search bar is highlighted with an orange box, containing the text "Search". Below the search bar, the breadcrumb "Dashboard / Knowledge Base" is visible. The main content area is titled "AutoMon Ticket Portal" and is divided into two sections: "AutoMon Ticket Portal" and "AIMS".

**AutoMon Ticket Portal**

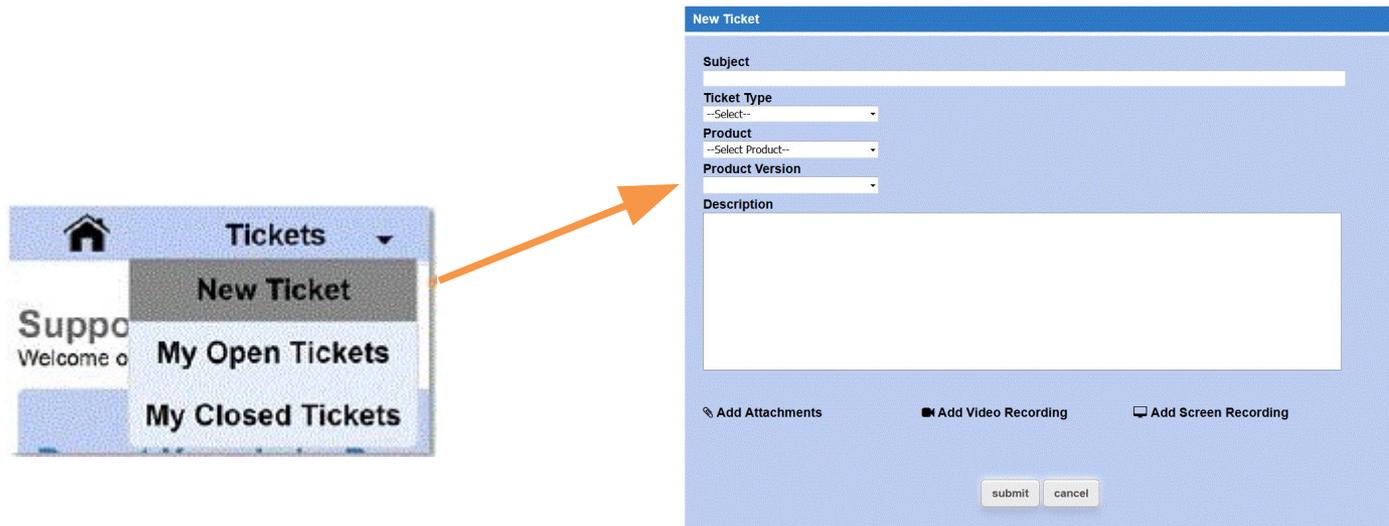
- Overview (4)**
  - Viewing Products
  - Using The Search Box
  - Working With Tickets
  - Account Settings
- Usage (3)**
  - Creating a TeamSupport Account
  - Screen Recording
  - Password Reset

**AIMS**

- Overview (3)**
  - AIMS Supported Browsers
  - AIMS Core Features
  - AIMS (AutoMon Involvement Management System) Overview
- Usage (67)**
  - Client Info- TANF
  - Client Info- Associates
  - Client Info- Drug Use
  - Client Info- Clinical Info
  - Client Info- Military
  - View More ↗
- Logging In (3)**
  - Navigating to AIMS
  - Resetting Your Password
  - Creating Your Account

## 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.).



The image shows a screenshot of the AutoMon support portal. On the left, a navigation menu is visible with a 'Tickets' dropdown menu. The 'New Ticket' option is highlighted, and an orange arrow points from it to the 'New Ticket' form on the right. The form is titled 'New Ticket' and contains the following fields and options:

- Subject**: A text input field.
- Ticket Type**: A dropdown menu with '--Select--' as the current selection.
- Product**: A dropdown menu with '--Select Product--' as the current selection.
- Product Version**: A dropdown menu.
- Description**: A large text area for entering the issue details.
- Add Attachments**: A checkbox.
- Add Video Recording**: A checkbox.
- Add Screen Recording**: A checkbox.
- submit** and **cancel** buttons at the bottom.