AutoMon

Innovative Solutions for Community-Based Corrections

AutoMon Involvement Management System

AIMS

APPLICATION TRAINING GUIDE

(Updated January 15, 2019)

AIMS Overview

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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.

AIMS Overview

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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

Supported Browsers

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

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

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Topics

Topic 1: Logging In

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Subtopics:

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

Create Your Account

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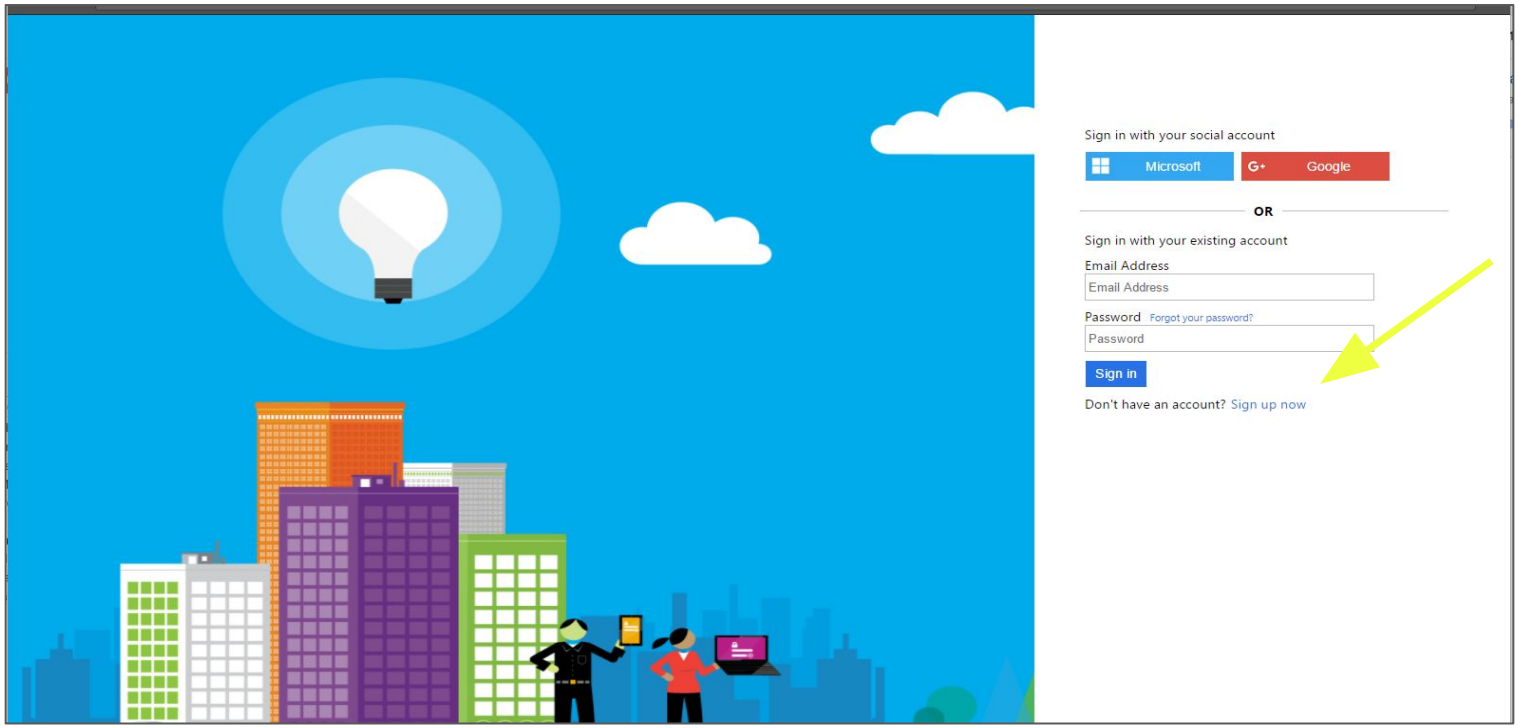
Steps

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.



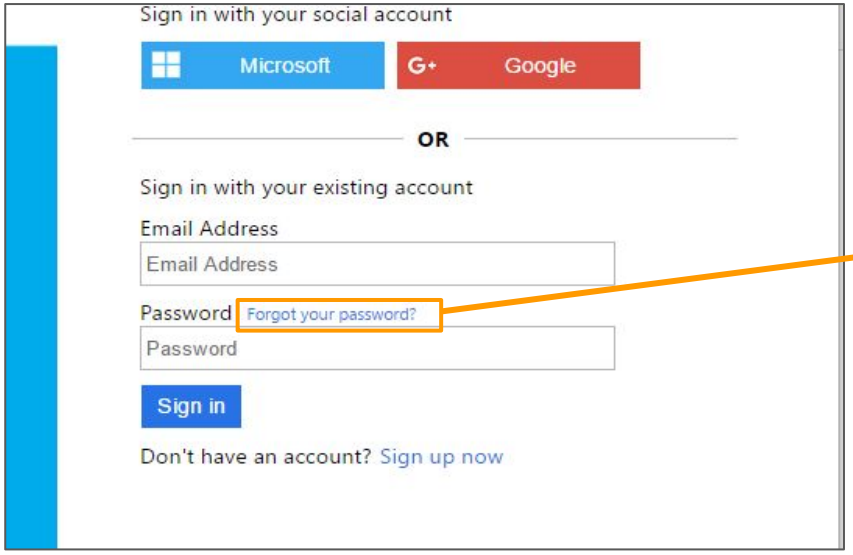
Resetting Your Password

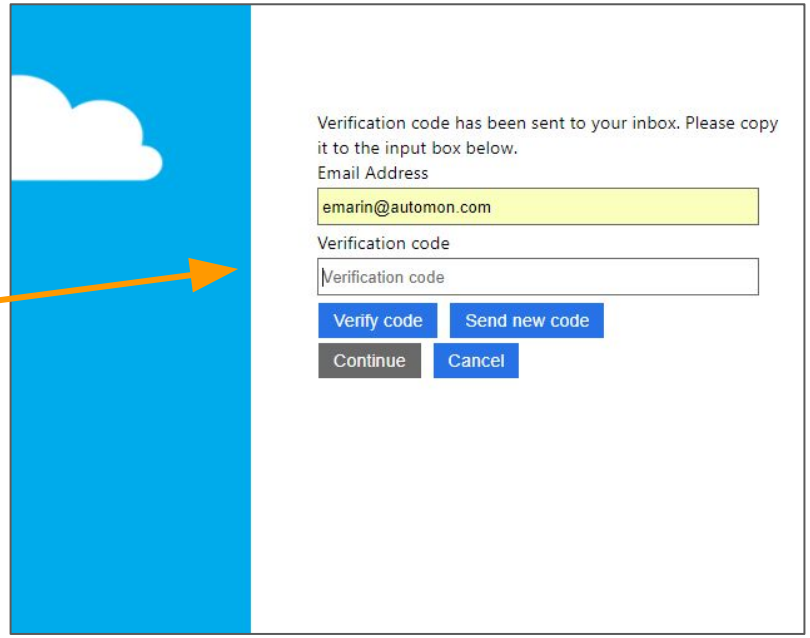
If at anytime a User forgets their password or wishes to reset it, follow the steps below:

Steps

To reset your AIMS Password:

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





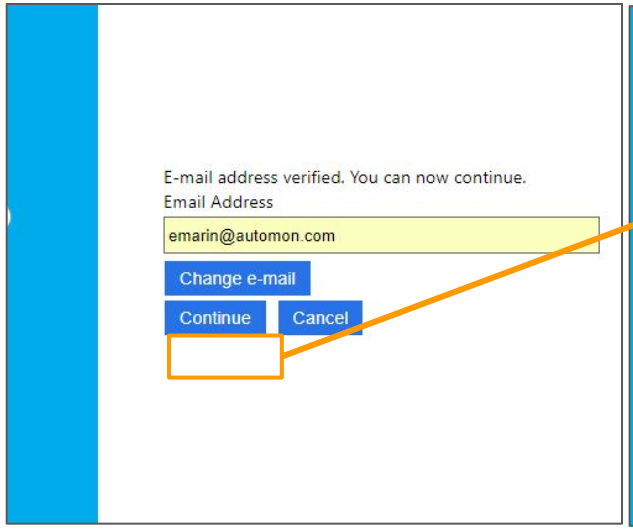
Resetting Your Password (Cont'd)

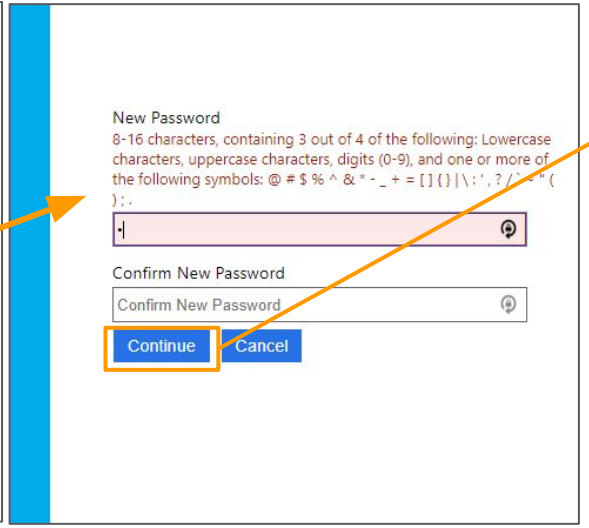
If at anytime a User forgets their password or wishes to reset it, follow the steps below:

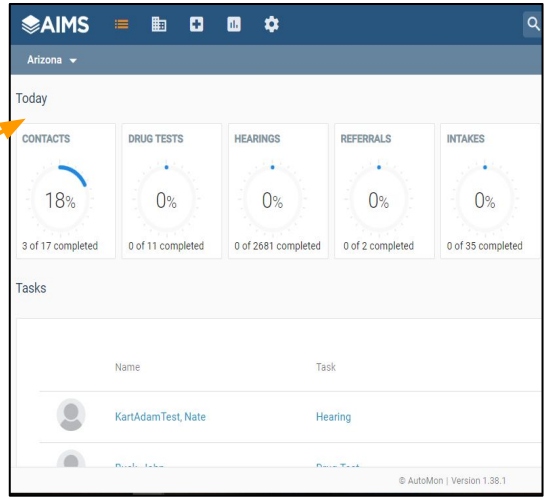
Steps

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.







Navigating to AIMS

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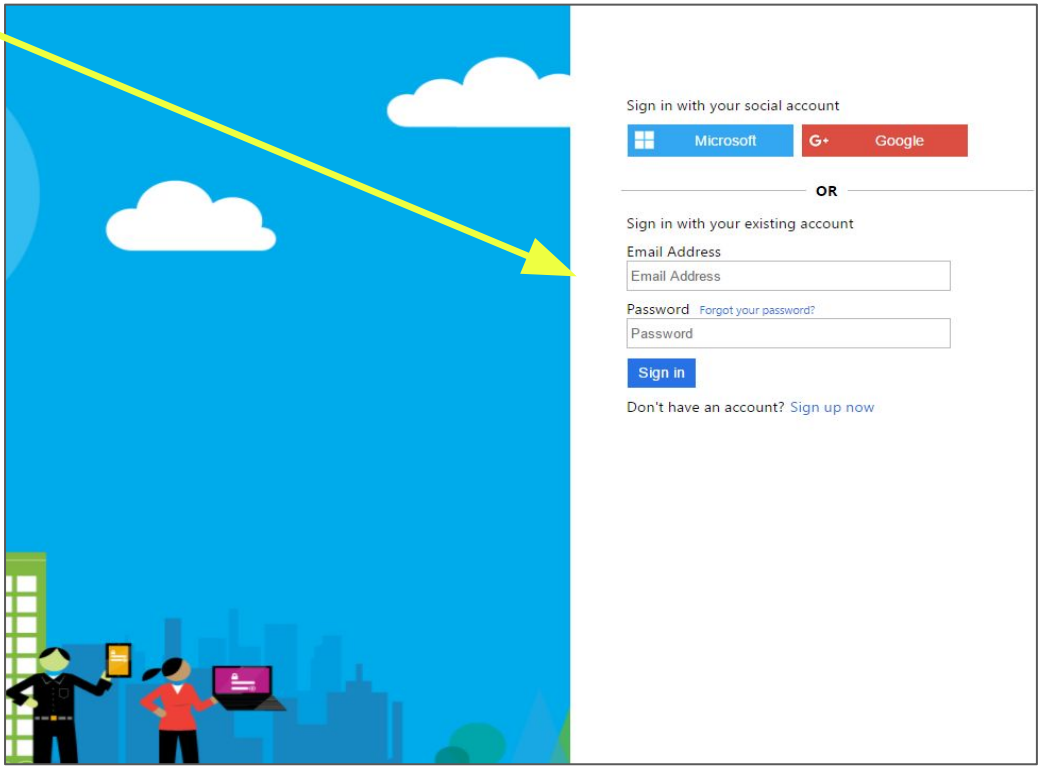
Steps

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”



Topic 2: Master Header

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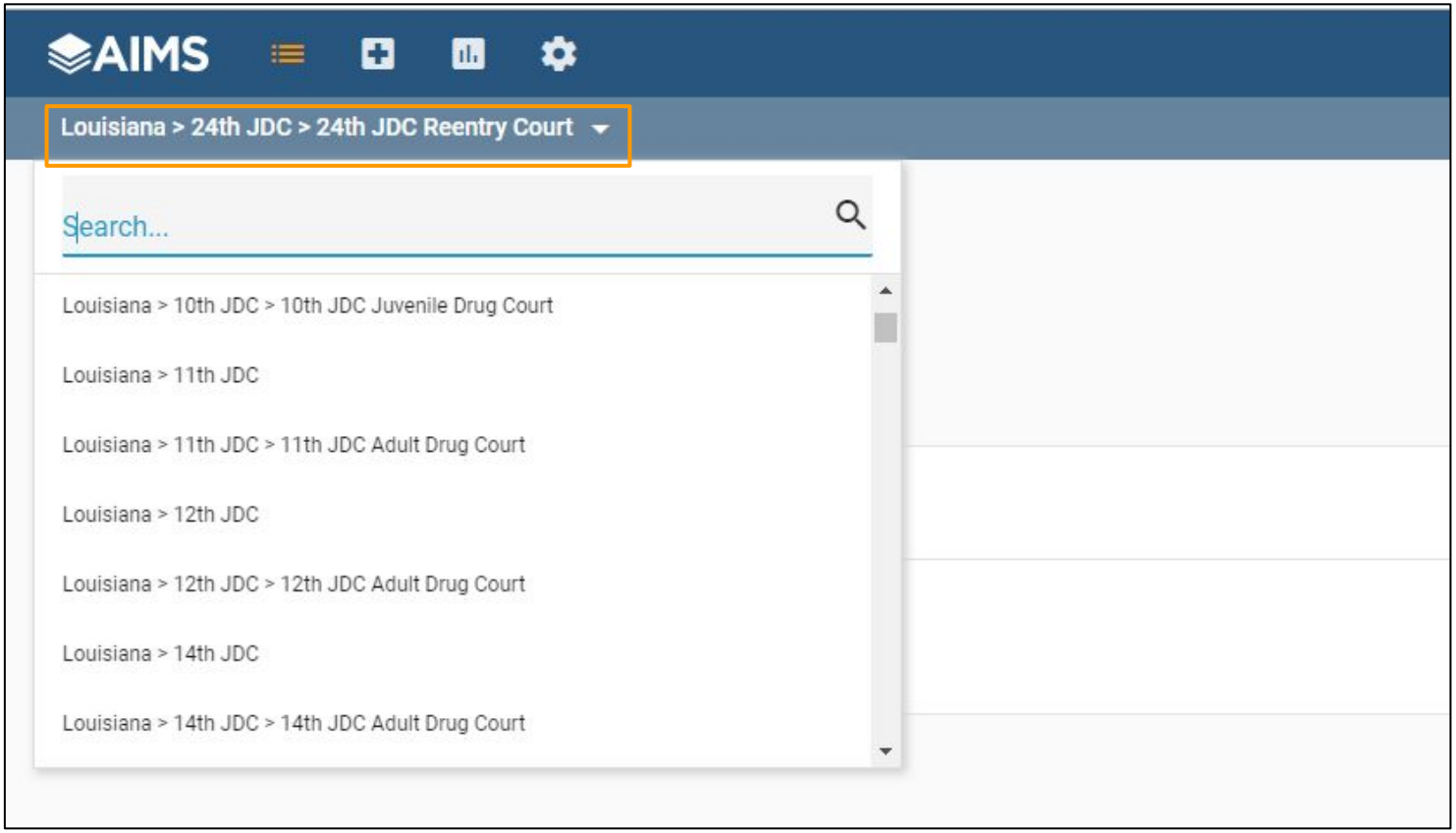
Subtopics

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.

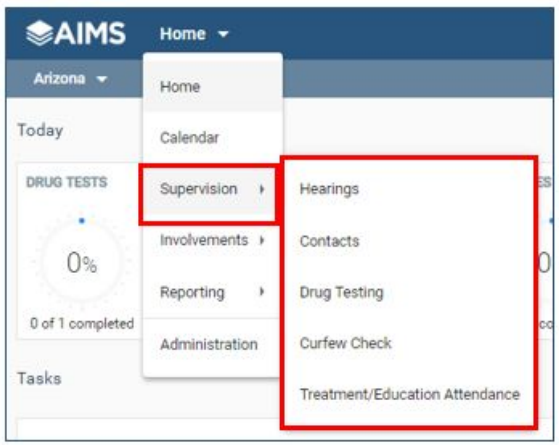
Security Location – AIMS supports security locations. Each user is configured for a specific security location(s). This allows the user to only see data from security locations they have permissions to, as well as create new data for those same locations.

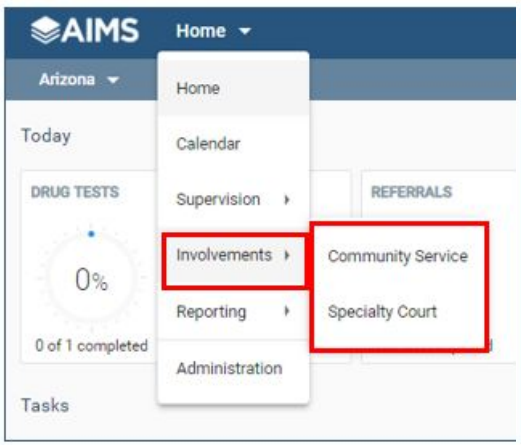


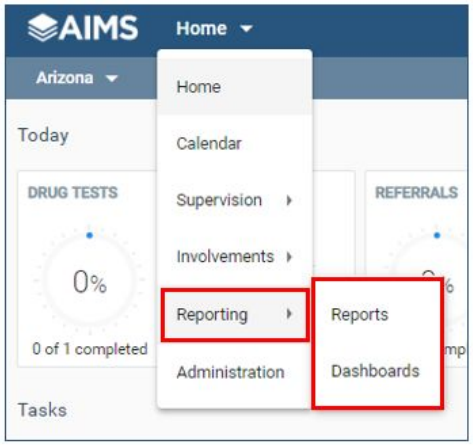
Master Header - Navigation Icons

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.

Master Header - Search

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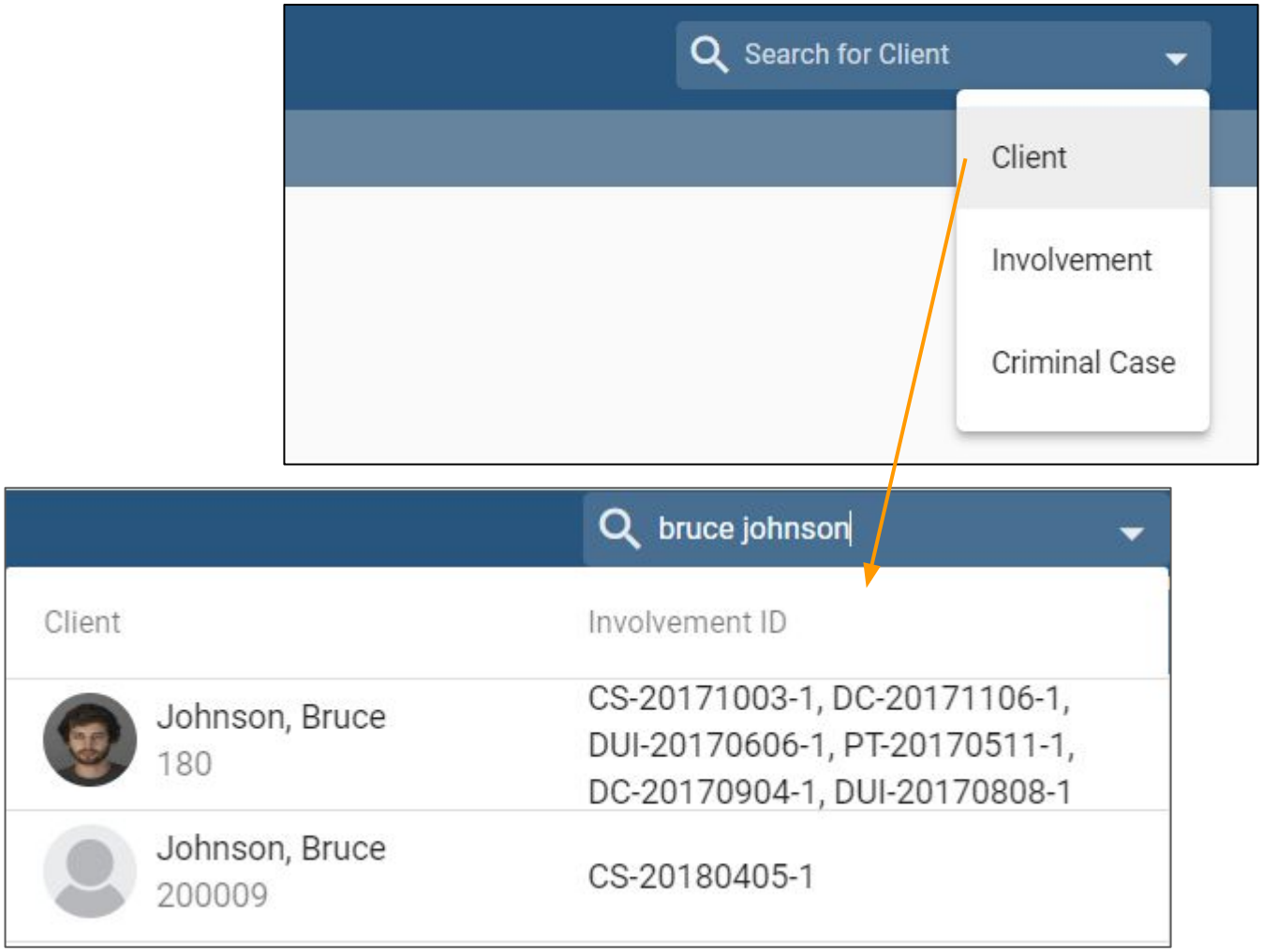
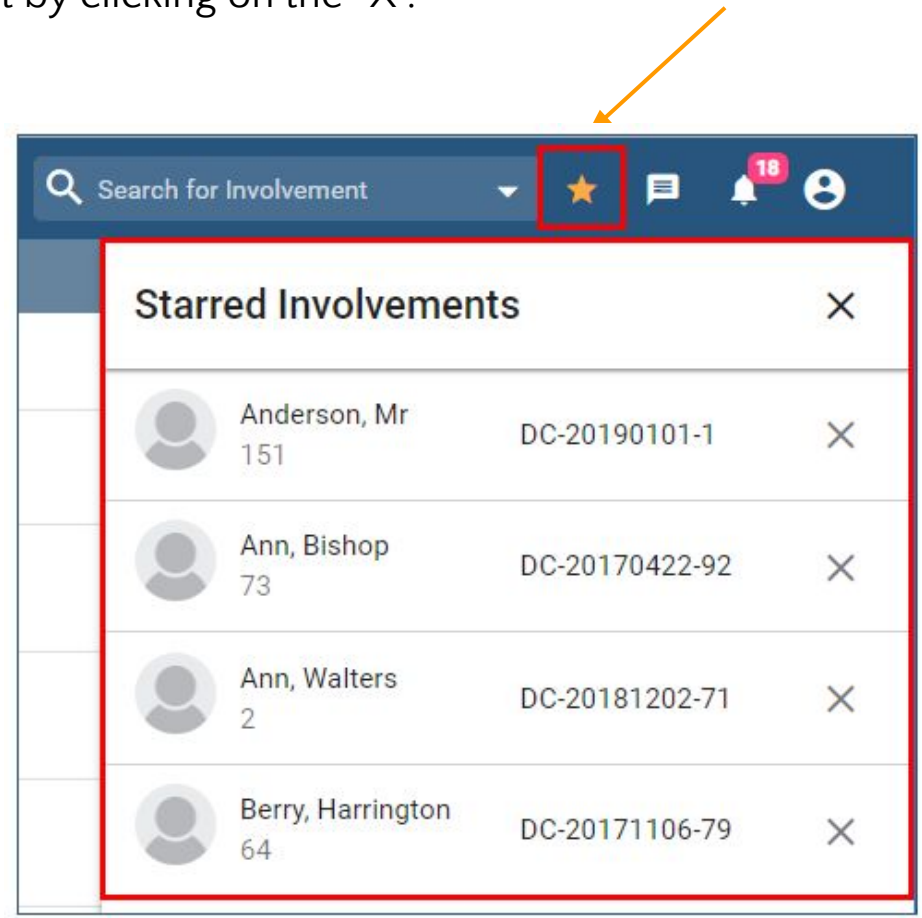
The **Search** bar allows Users to search for all Clients in the system by Client (Name and ID number), Involvement number, or Criminal case number.



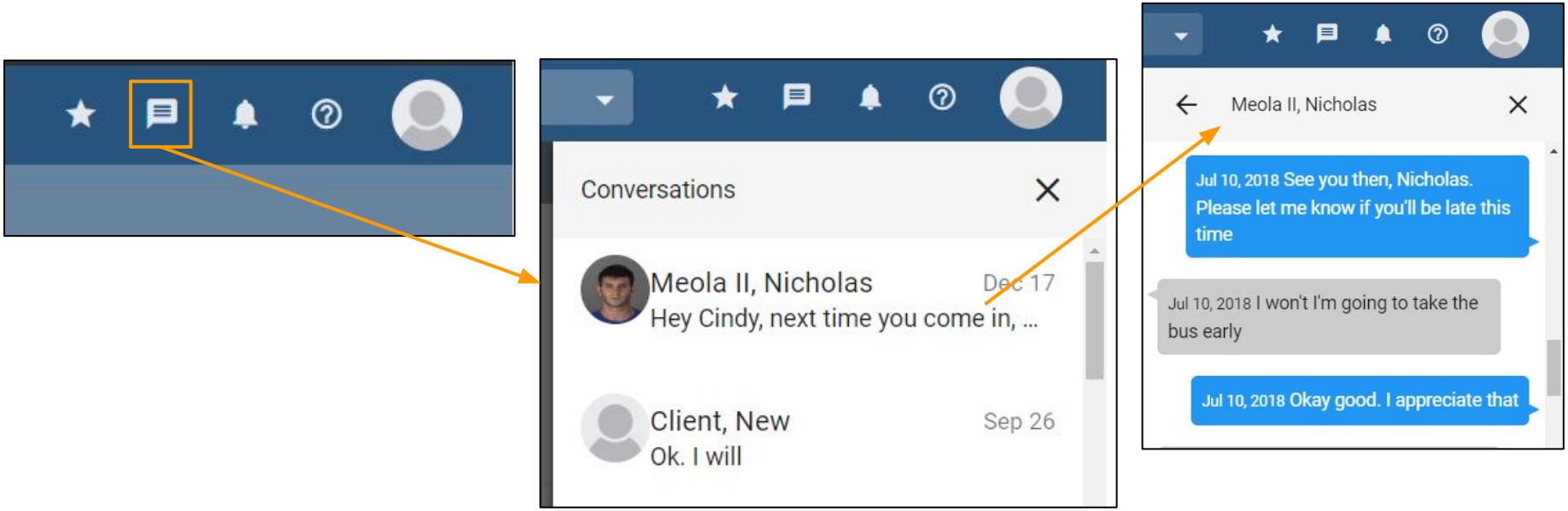
Master Header - Starred involvements

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 he Starred Involvements list by clicking on the “X”.



Master Header - SMS Messaging

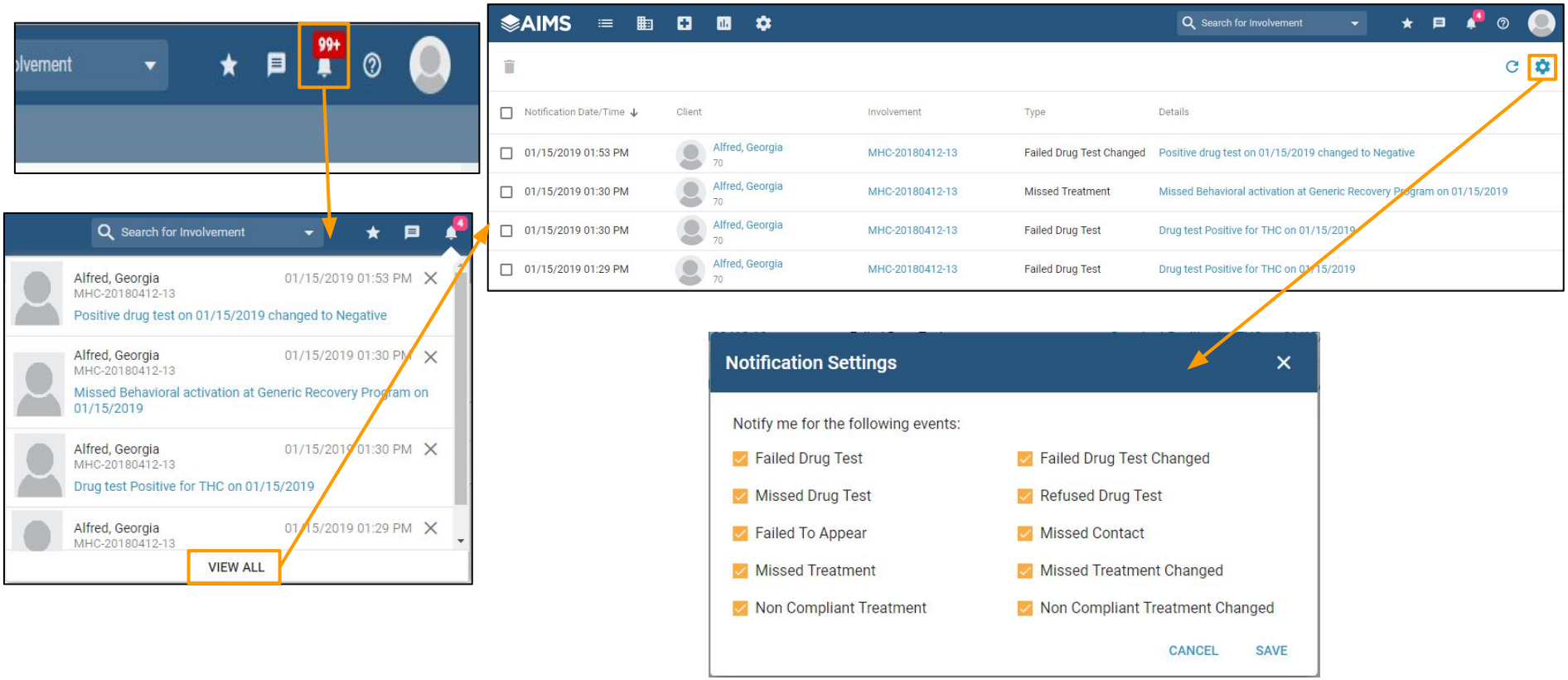
The **SMS Messaging** icon allows Users to view recent text messages exchanged between Users and Clients. Users can click on the Client's name to view all of the messages between the User and that Client.



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

AutoMon | Master Header - Notification

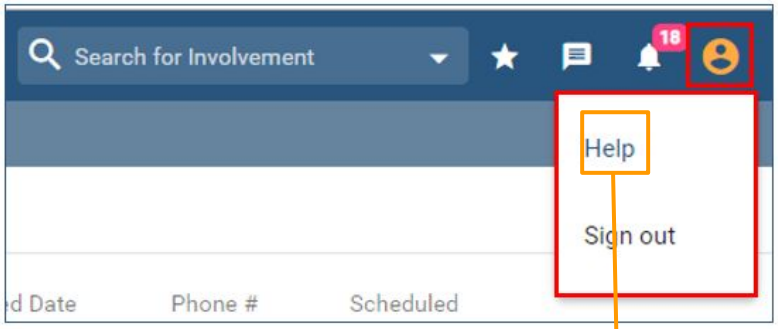
The **Notification** icon will display all of the User's recent alerts. Users can filter the type of results they wish to be notified of by selecting those options in ***Notification Settings***.

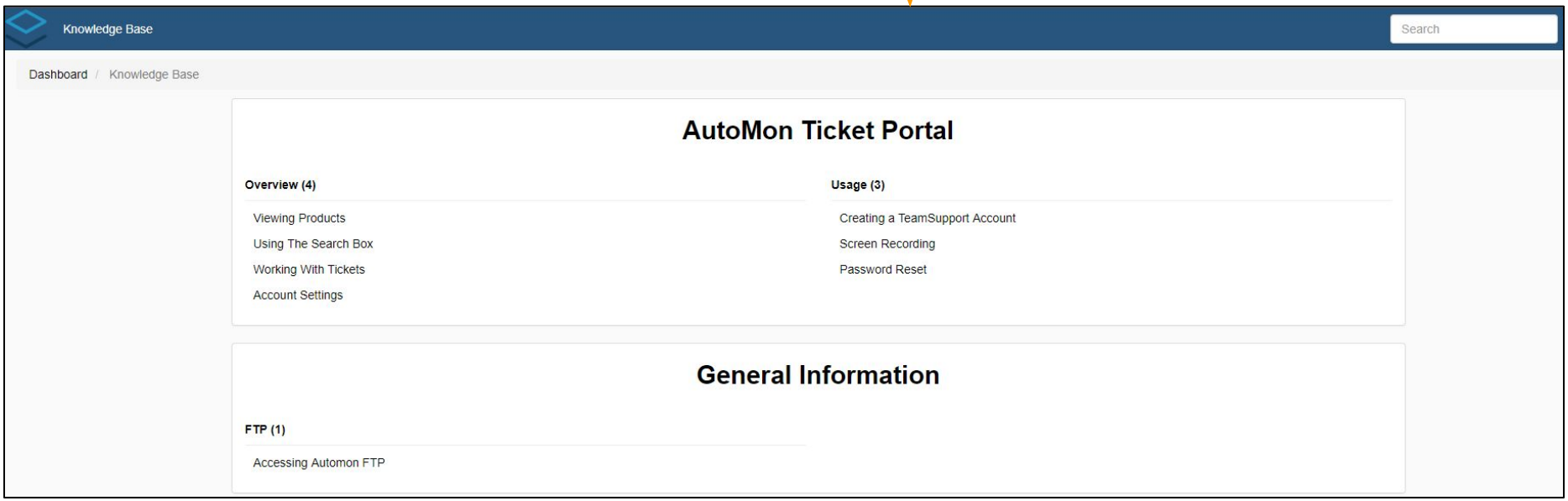


Notification Settings allows the user to select or deselect the type of alerts they wish to be notified of.

Master Header - Help

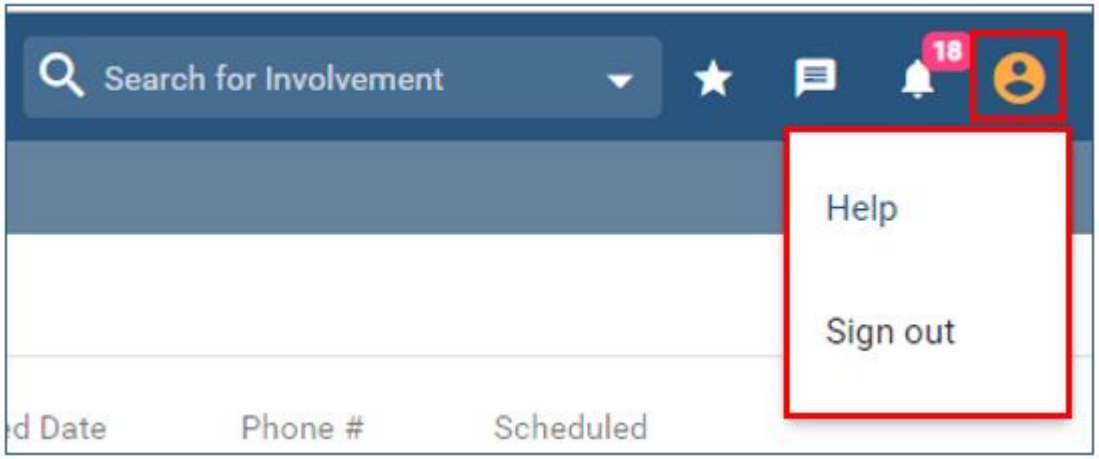
The **Help** icon will allow direct to users to our *TeamSupport* support portal. Users have the ability to search through the Knowledge Base articles to find helpful hints and 'how to's'.





Master Header - User Menu

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



Topic 3: Agenda

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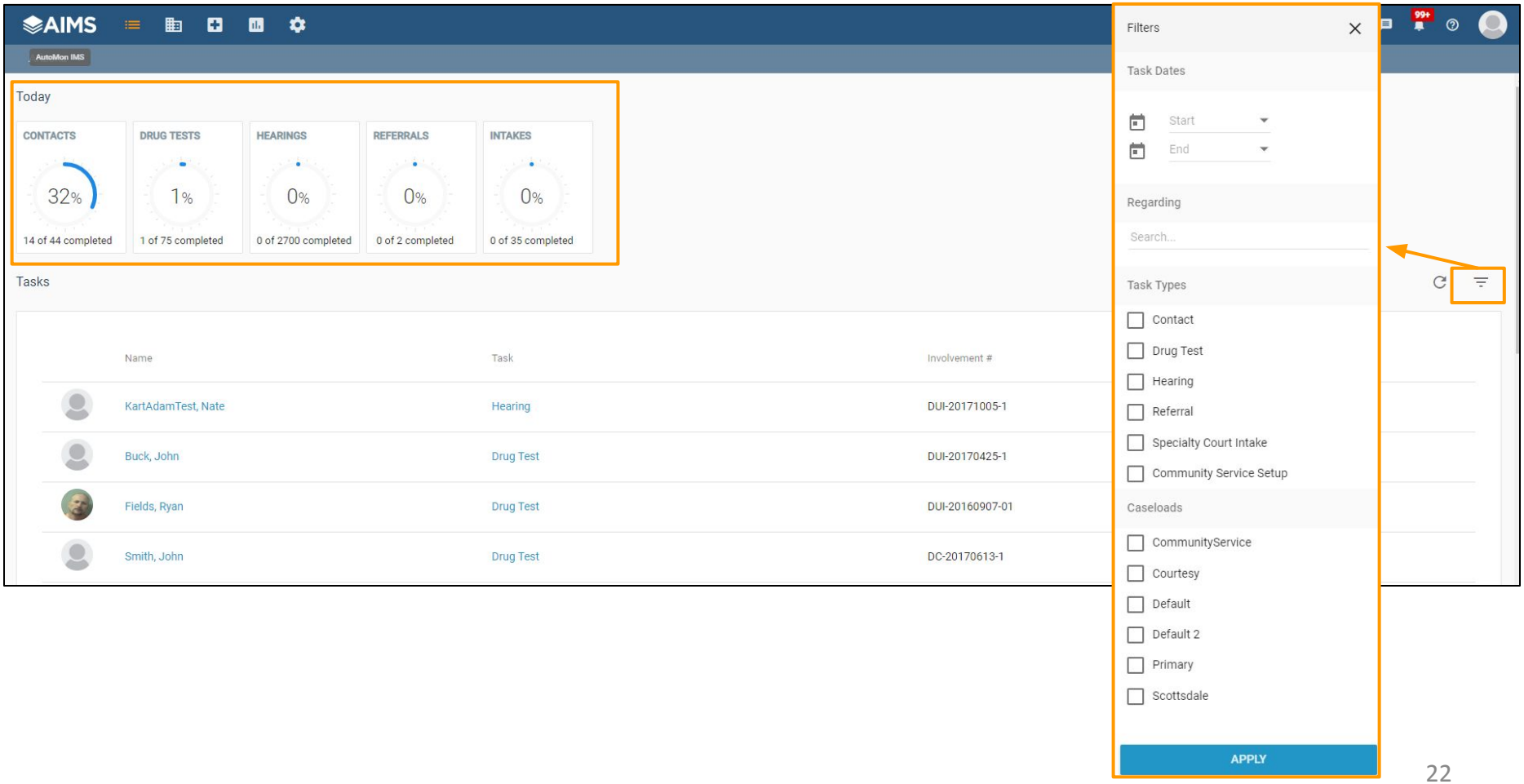
Subtopics:

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

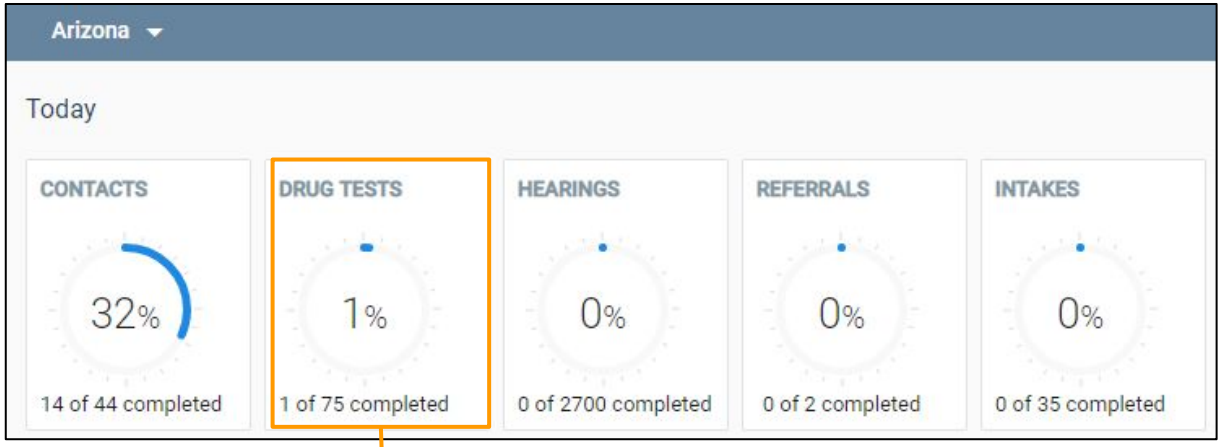
AutoMon | Agenda - Overview

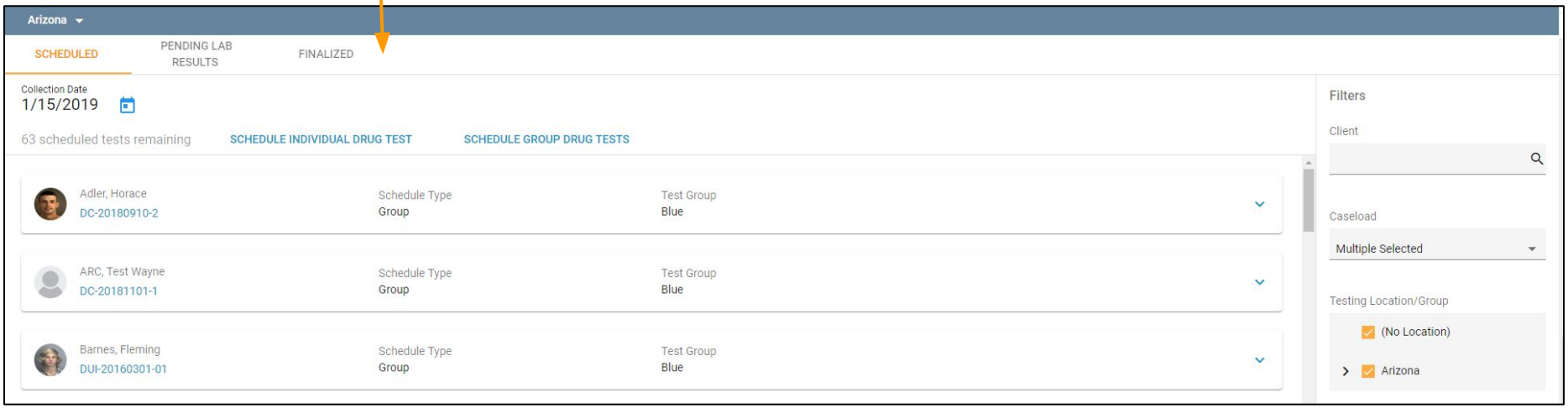
The Agenda will display a list of client tasks to be completed. Users also receive insights into the percentage of completed Contacts, Drug Tests, Hearings, Referrals, and Intakes. The list of Tasks will display in order by due date and can be Filtered by Date Range, Task types, Caseloads, and/or Client.



AutoMon | Agenda - Today's Percentages

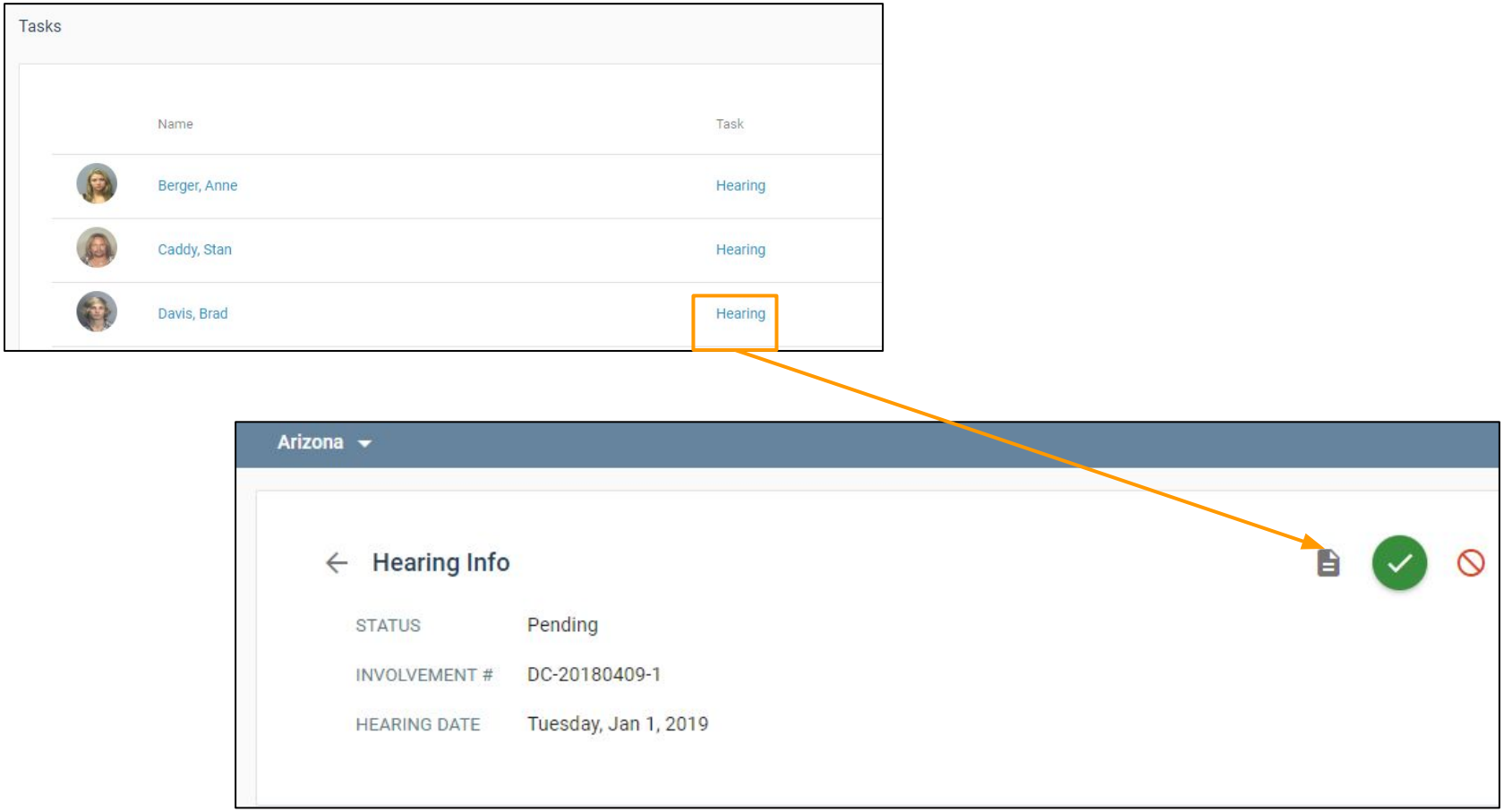
Users can click Today's Contacts, Drug Tests, Hearings, Referrals, or Intakes Percentage box in order to navigate to the selected sections Schedules list.





AutoMon | Agenda - Tasks

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



Topic 4: Calendar

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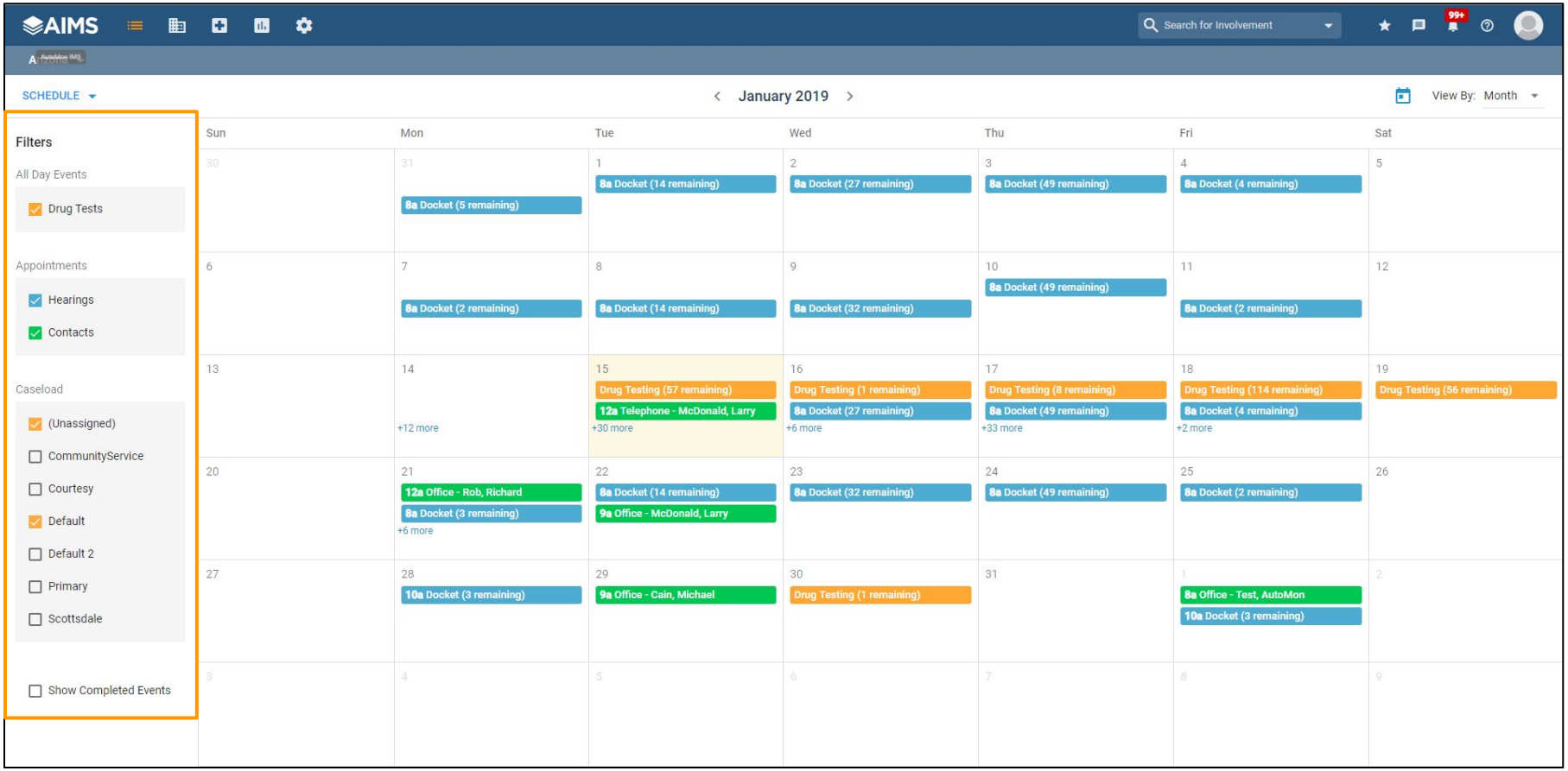
Subtopics:

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

AutoMon | Calendar - Overview

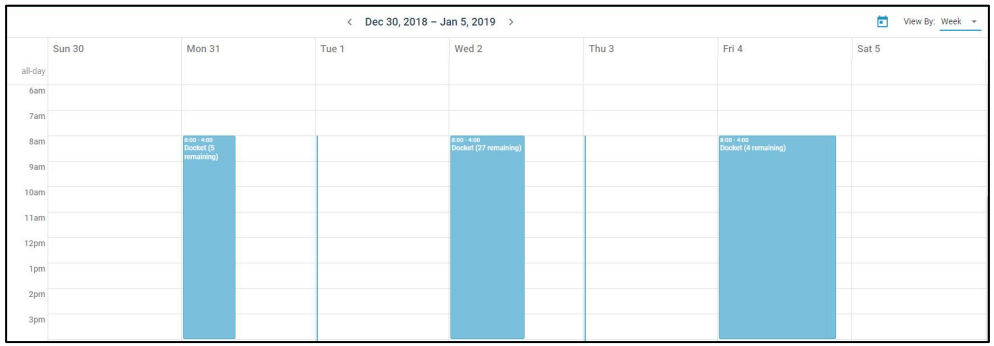
The **Calendar** manages Hearings (Dockets), Drug Tests, and Reporting Requirements for each Court. The Calendar can be viewed by the day, week, or month, and has the ability to filter for specific activities.



AutoMon | Calendar - Views

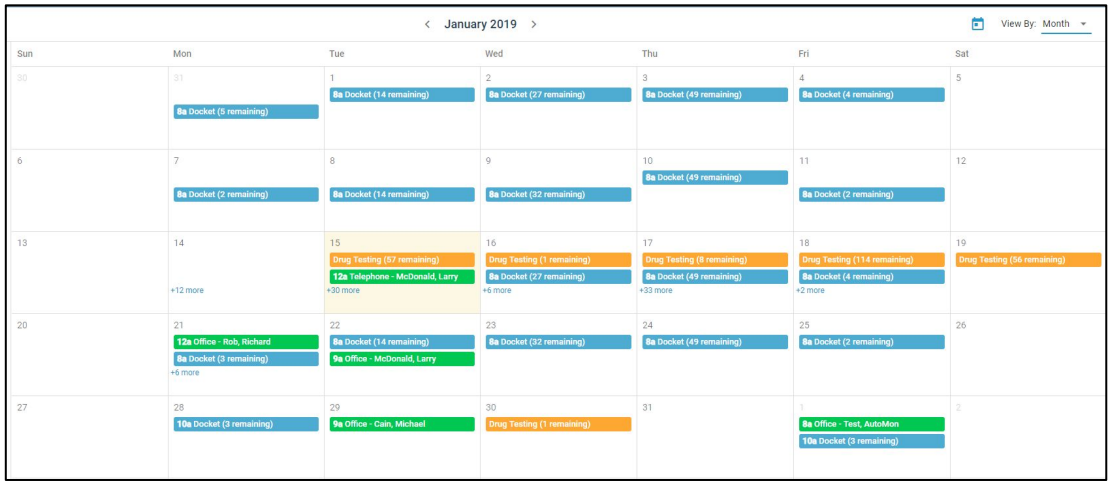
The User's calendar will default to a monthly **View**. Users can change this view by selecting one of the three view in the drop down in the top right corner of the calendar. The icons appear as follows:  View By: Month . Once a User selects a view, the date range slider will appear in the middle of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

Daily



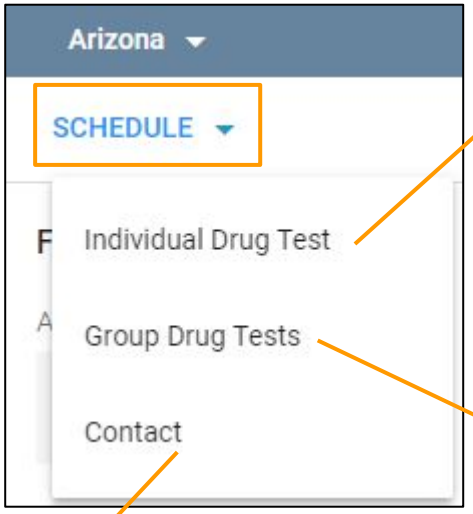
Weekly

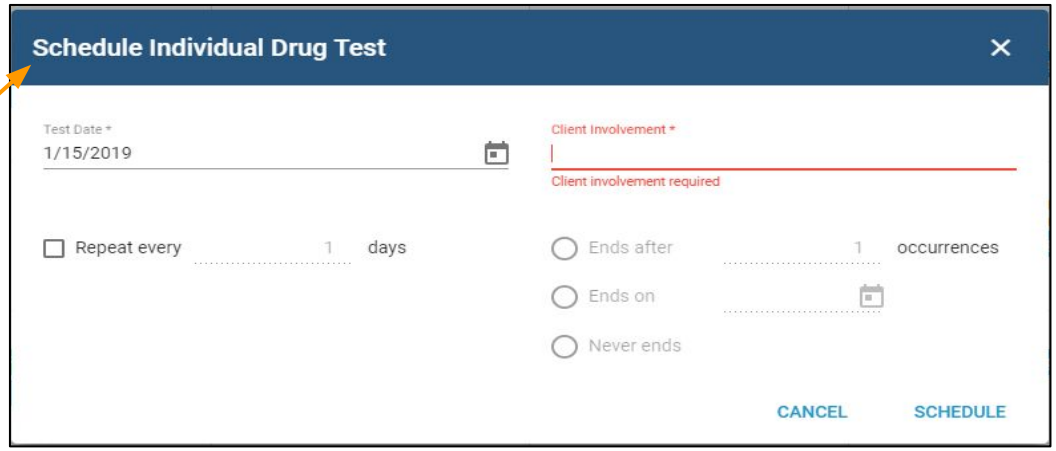
Monthly

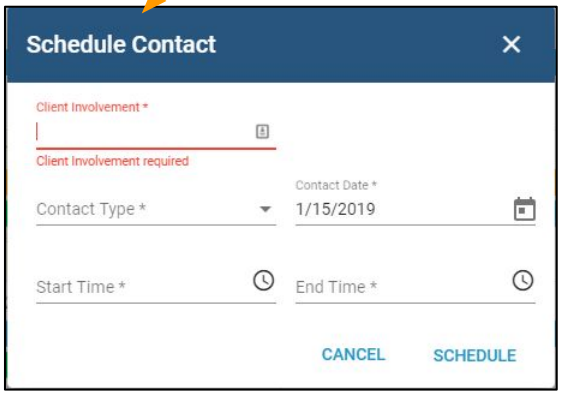


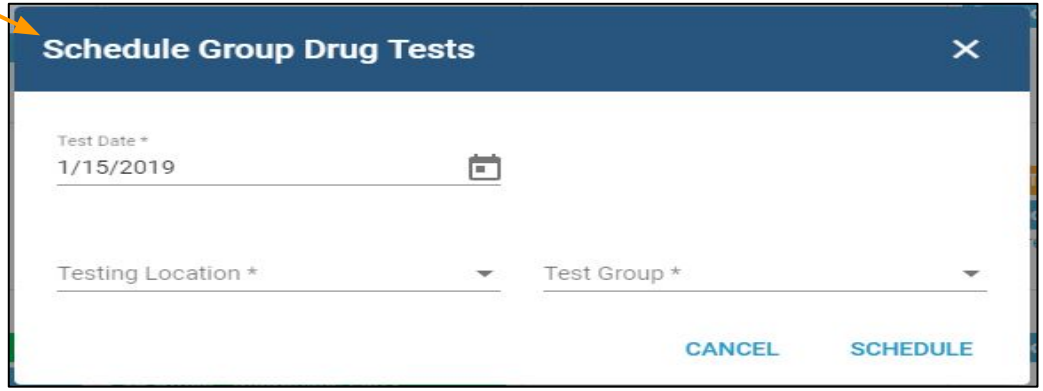
Calendar - Schedule New Events & Appointments

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





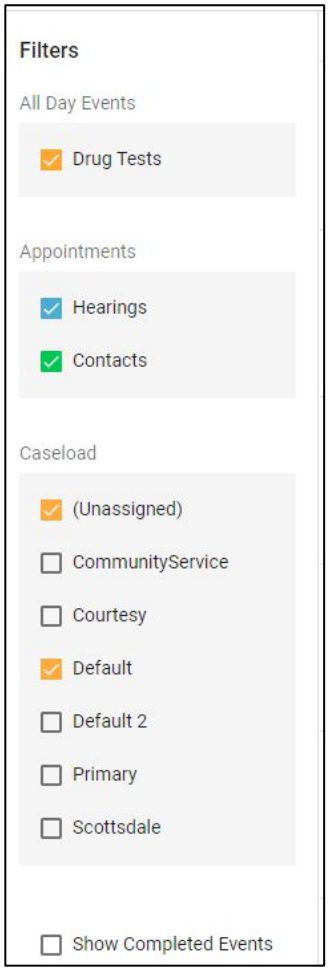


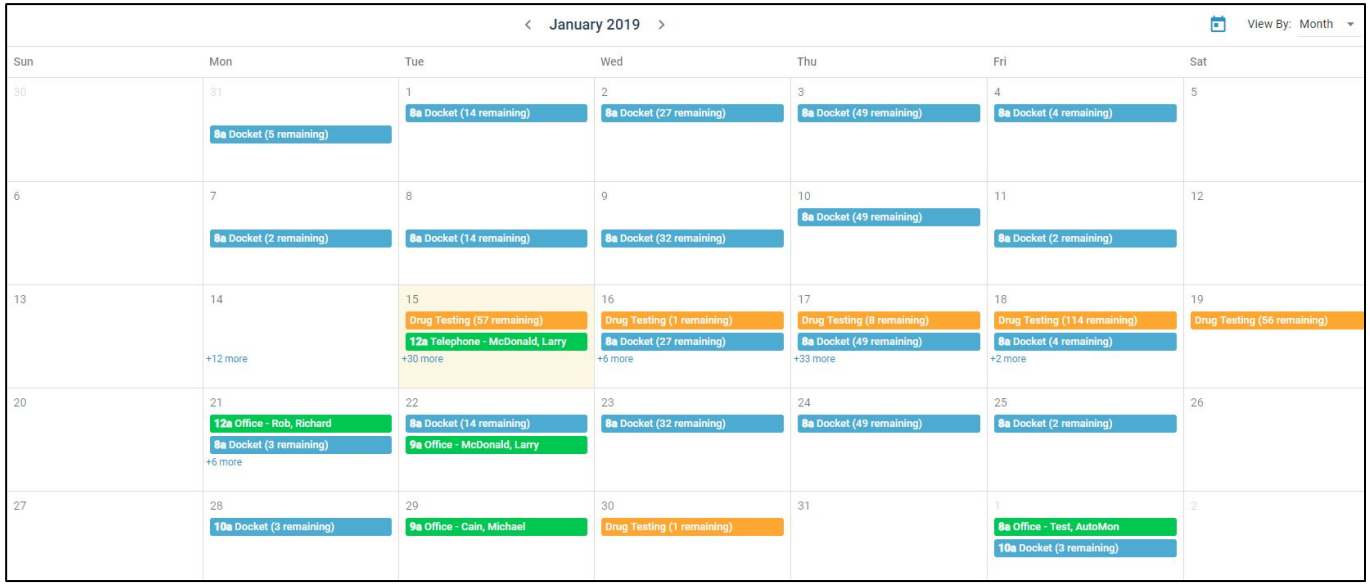


Users can also left mouse click on a calendar to schedule new drug tests and contacts.

Calendar - Filters

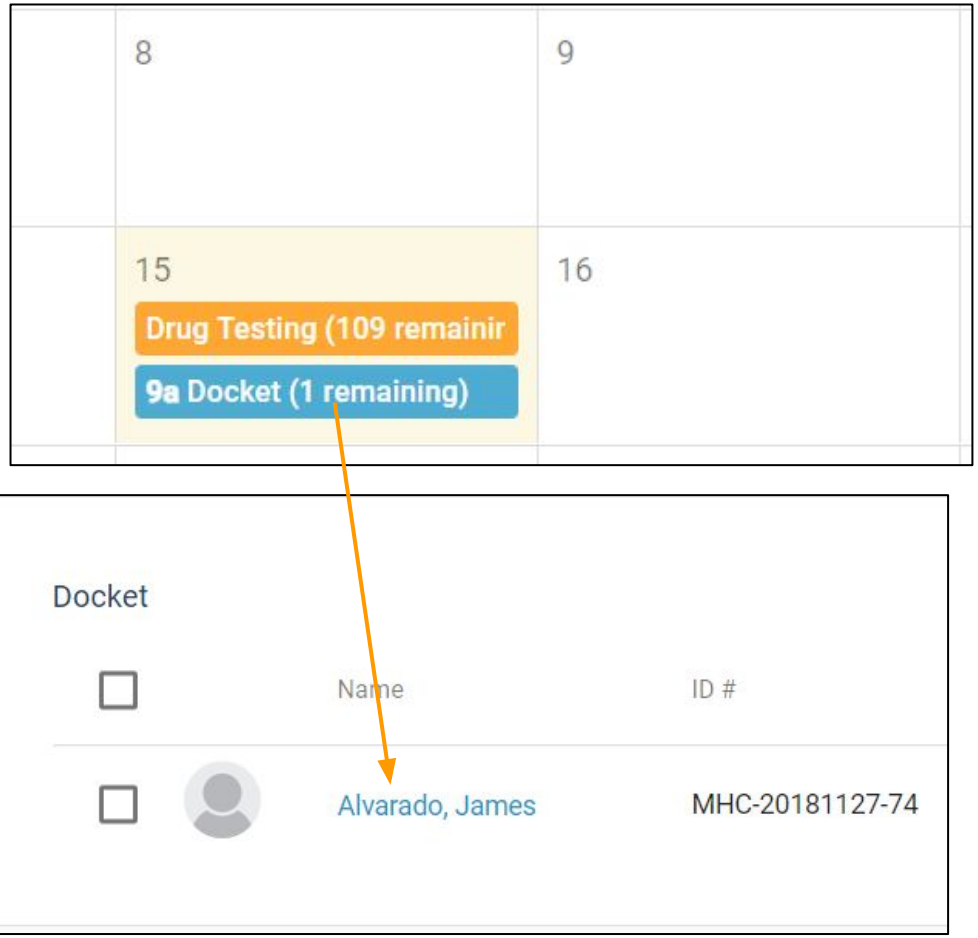
Users have the ability to **filter** the events they would like displayed on the calendar by selecting and deselecting the events, appointments, Caseloads, and indicate if you want to see completed events.





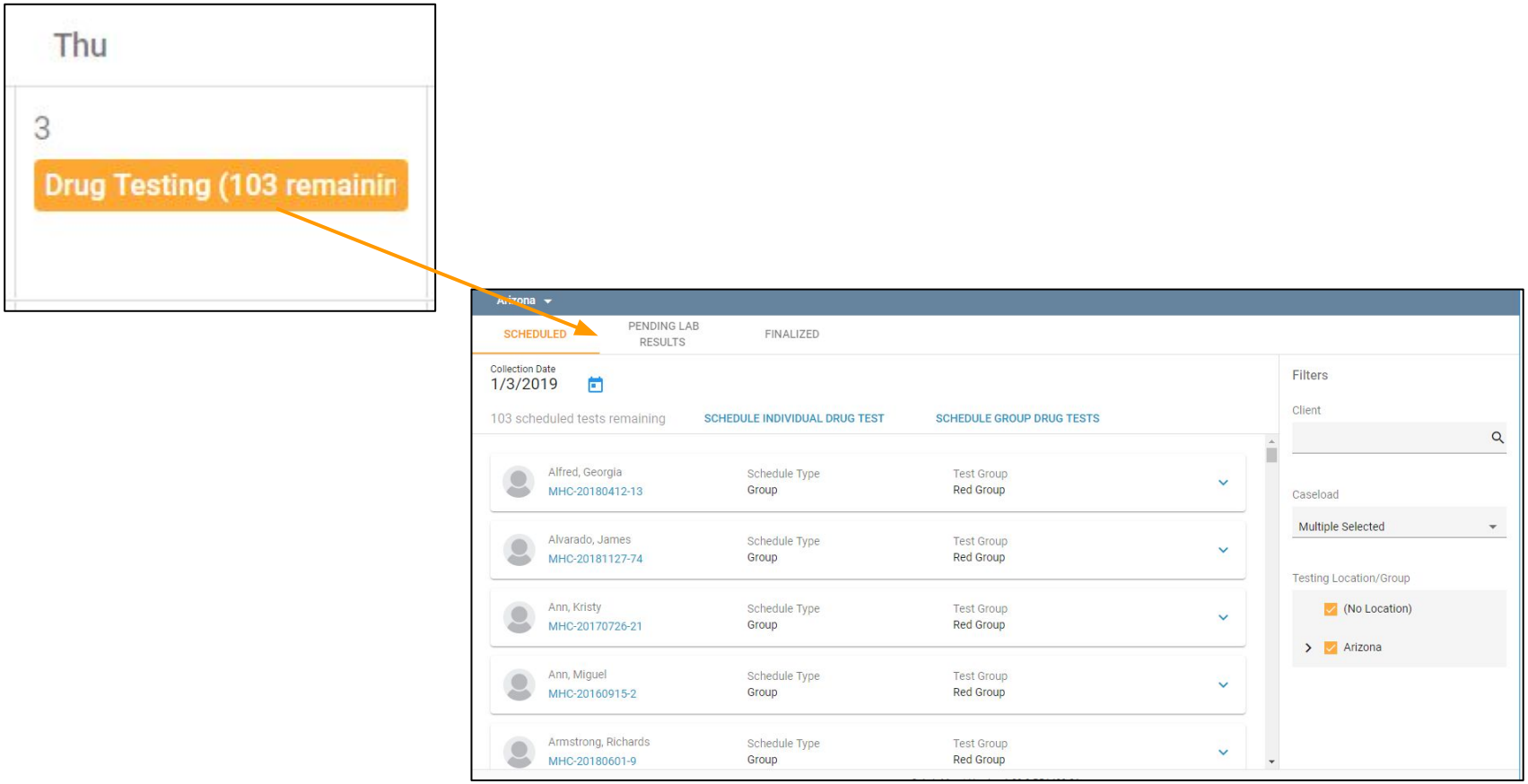
Calendar - Dockets

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



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.



Calendar - Reporting

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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.

Topic 5: Contacts

Back to Topics

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

AutoMon | Contacts - Overview

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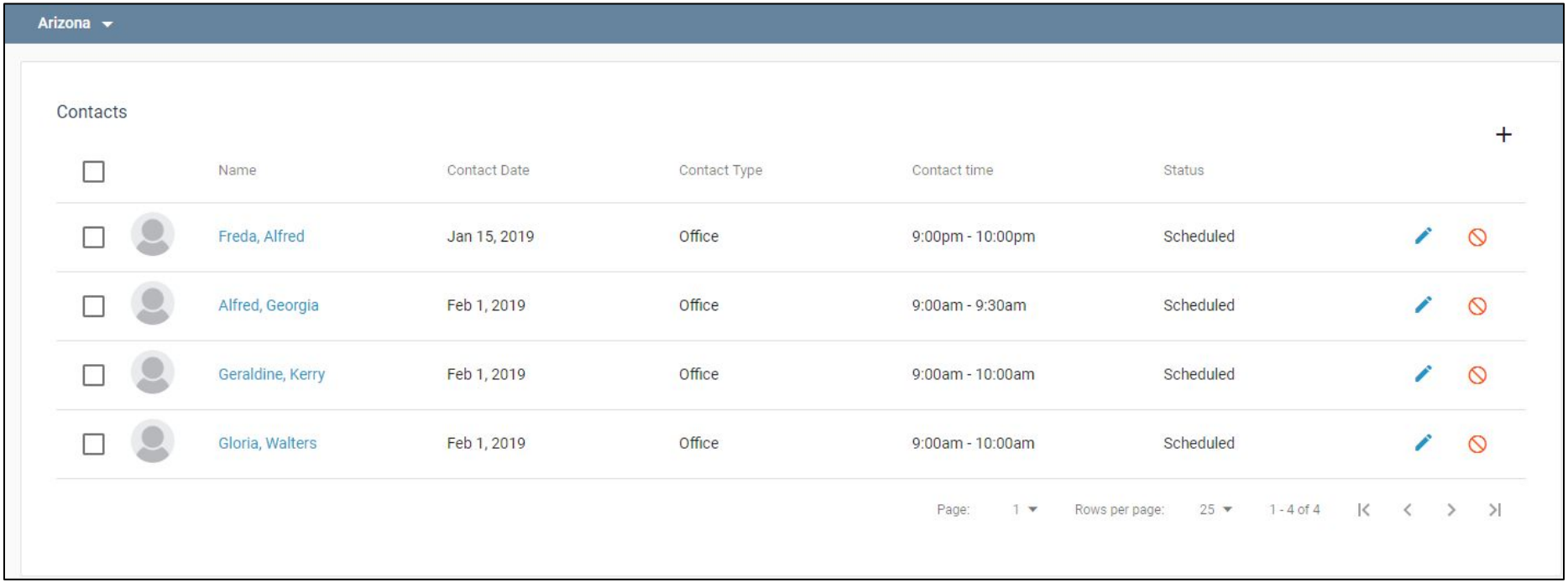
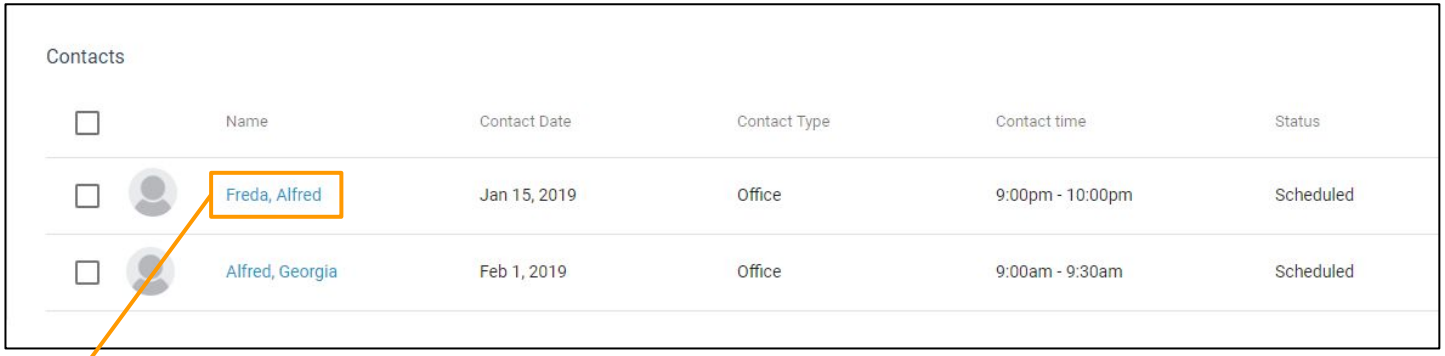
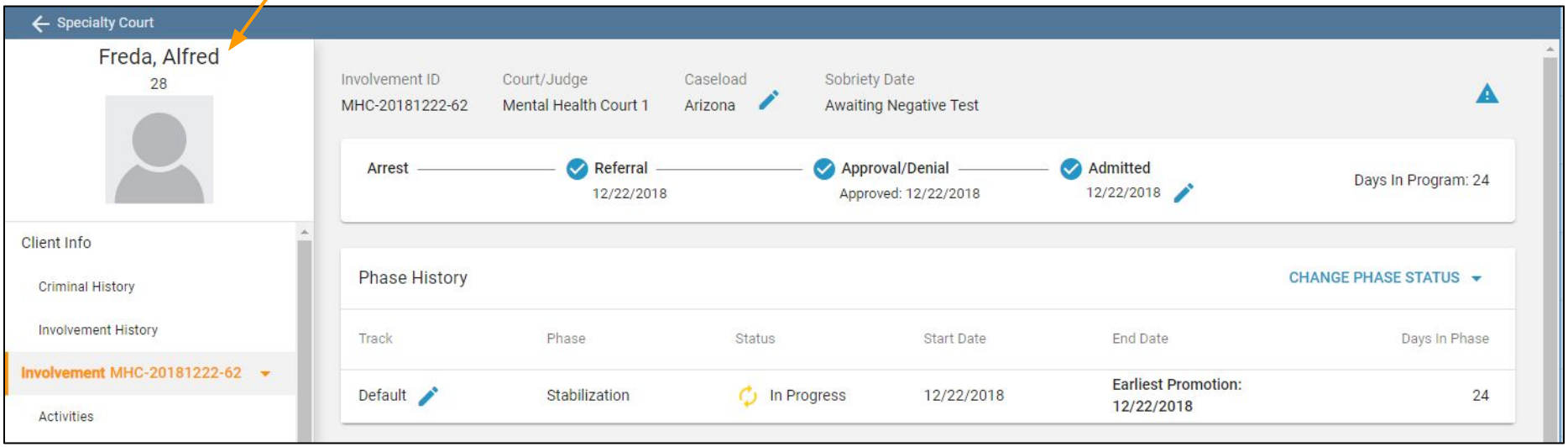
The **Contact** tab allows Users to view all Clients who are scheduled to for a Contact appointment. The list is sorted by contact date in ascending order.



AutoMon | Contacts - Client's Name

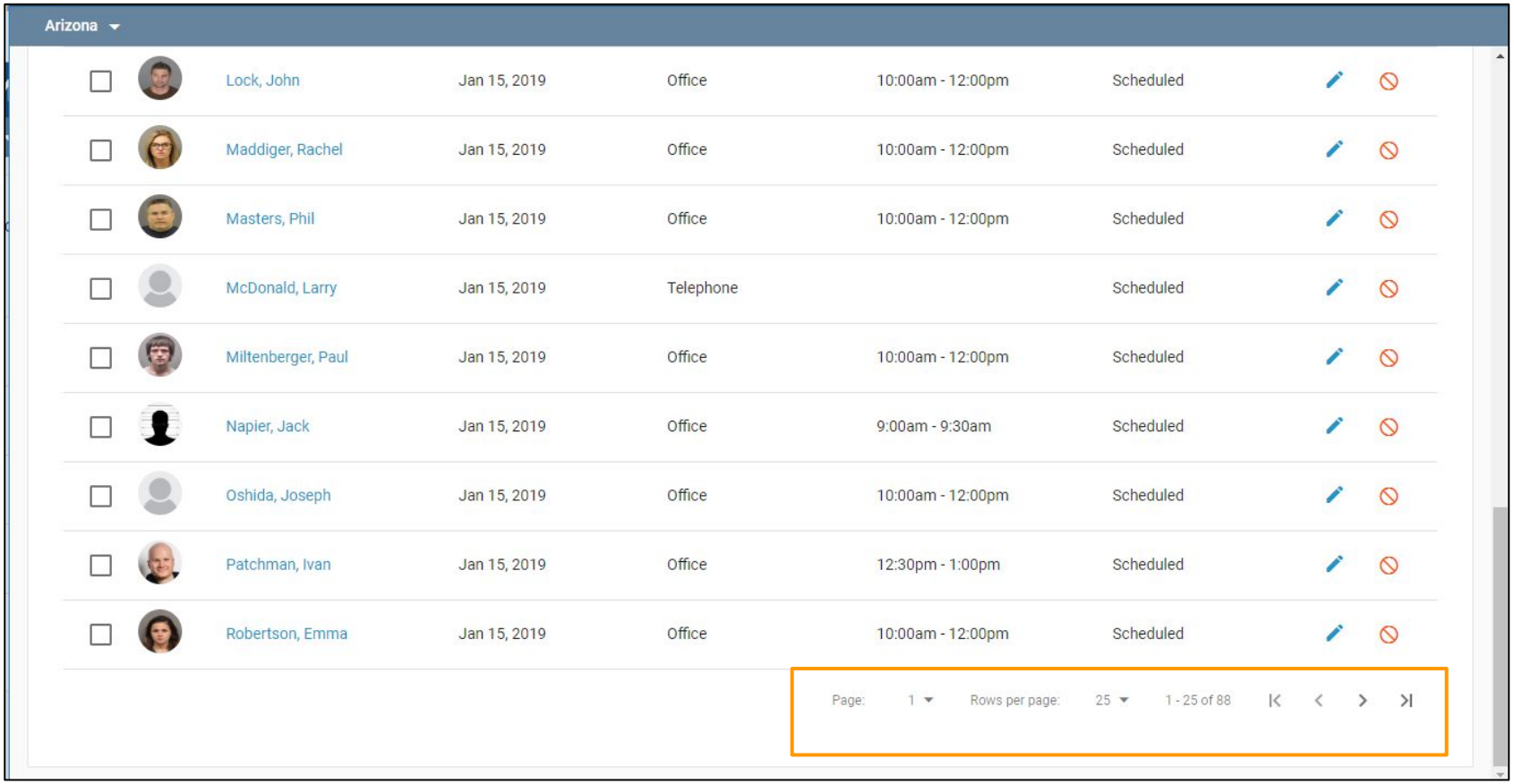
Users can select a Client's name to be redirected to the Client's Involvement overview.





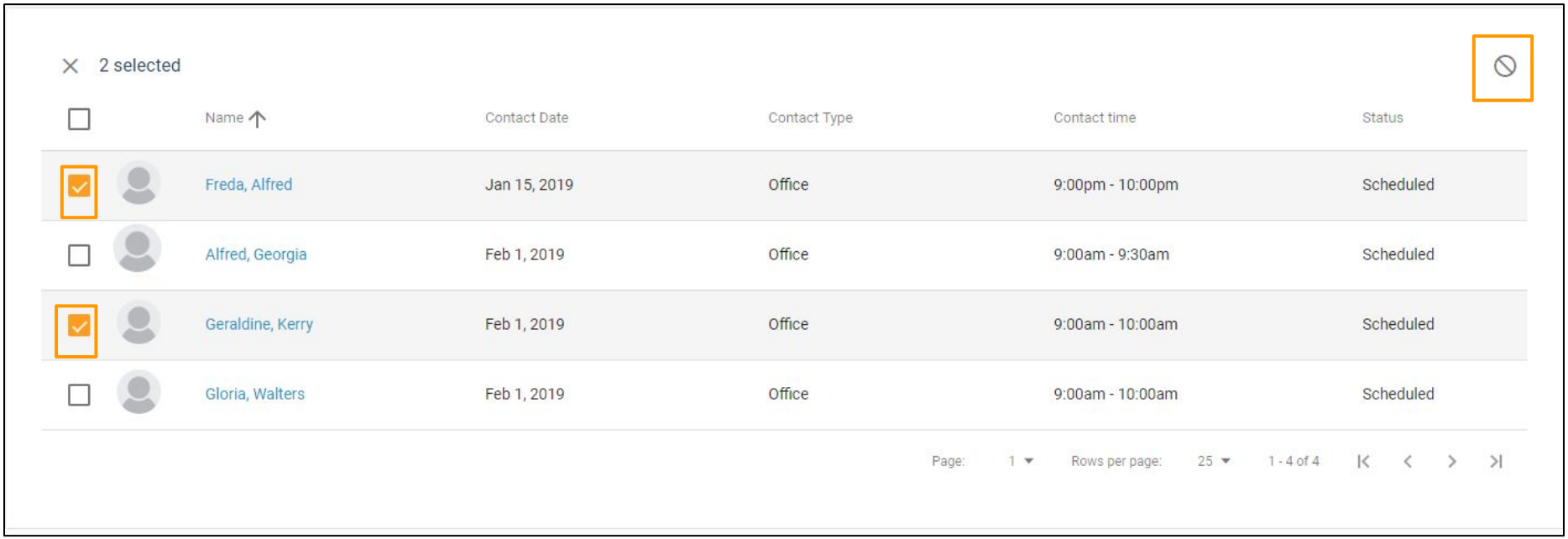
AutoMon | Contacts - Pagination

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



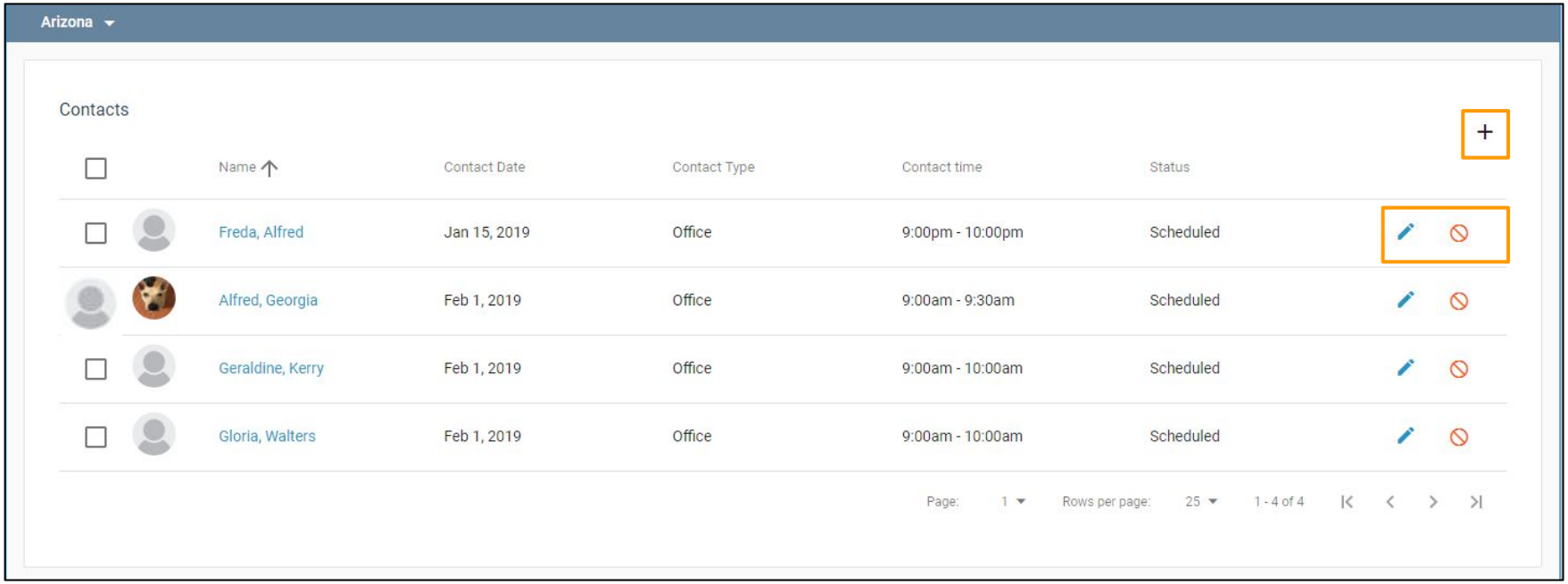
Contacts - Selecting Multiple

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.



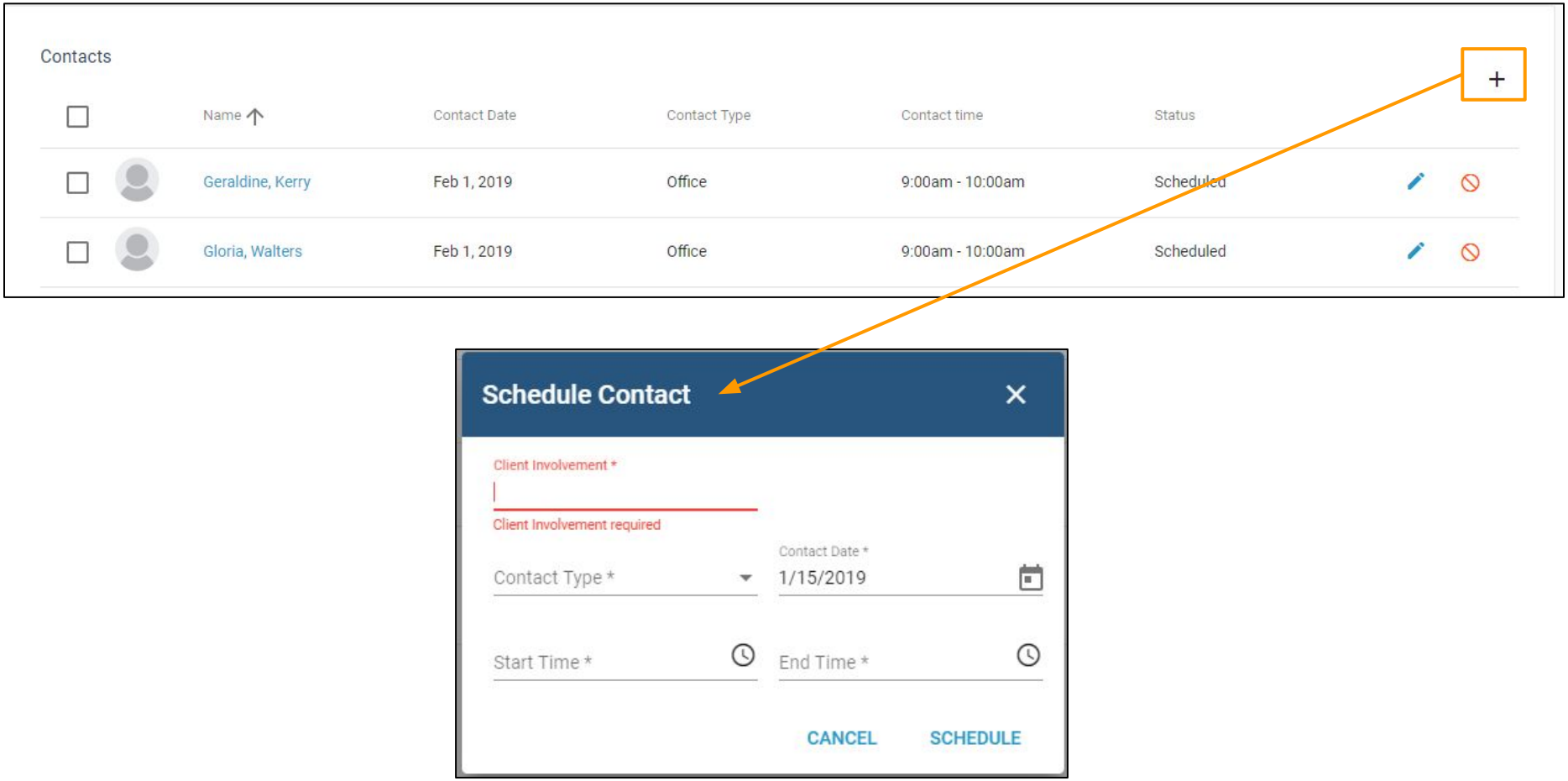
Contacts - Icons

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



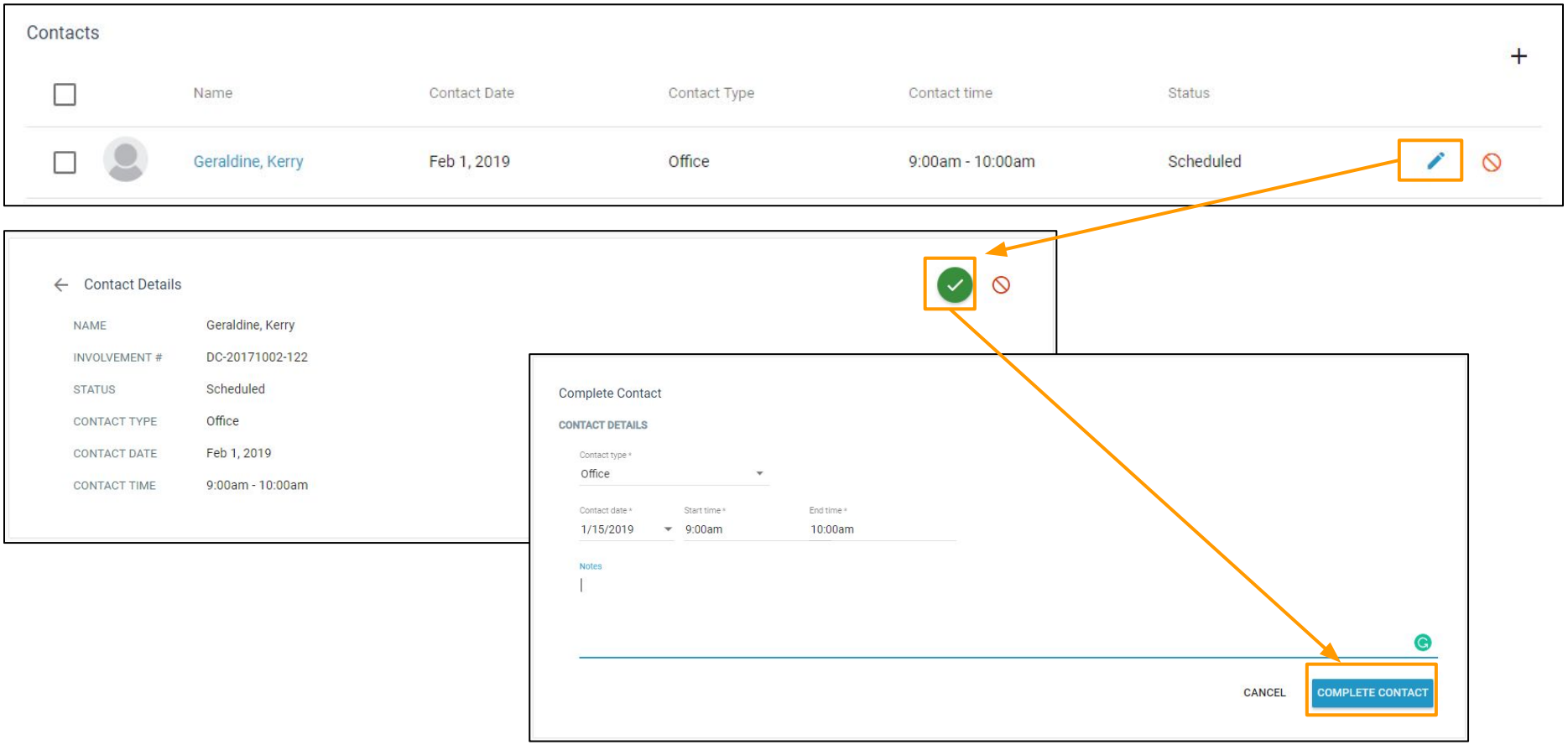
Contacts - Scheduling a New Contact

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.



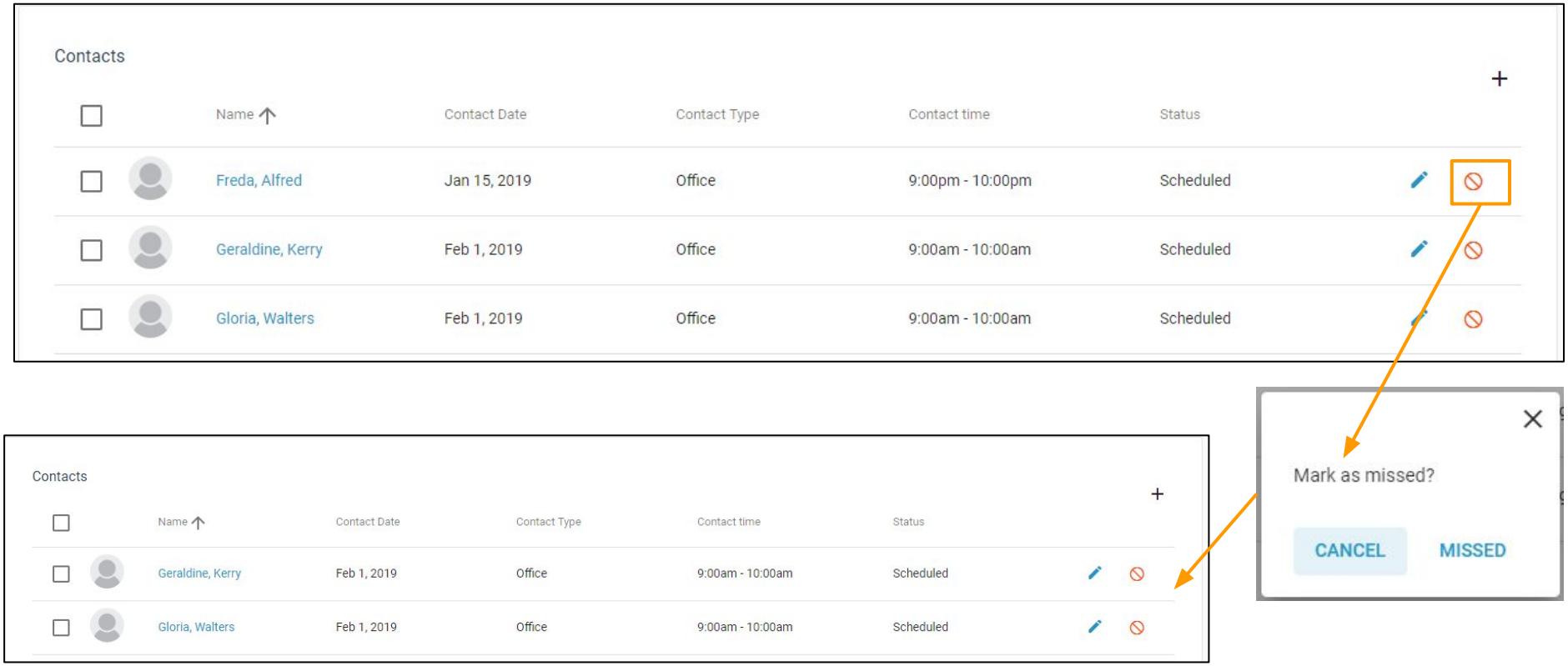
Contacts - Completing A Contact

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



Contacts - 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.



Topic 6: Drug Testing

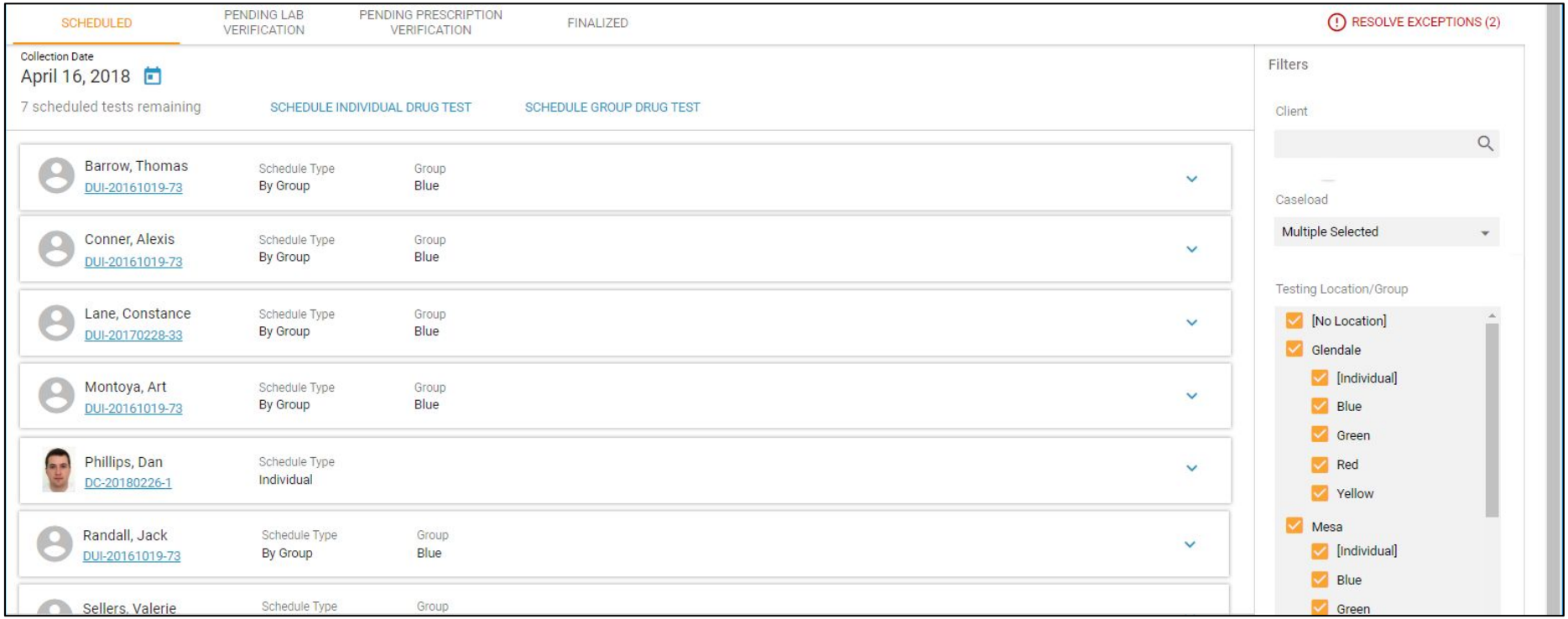
Back to Topics

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

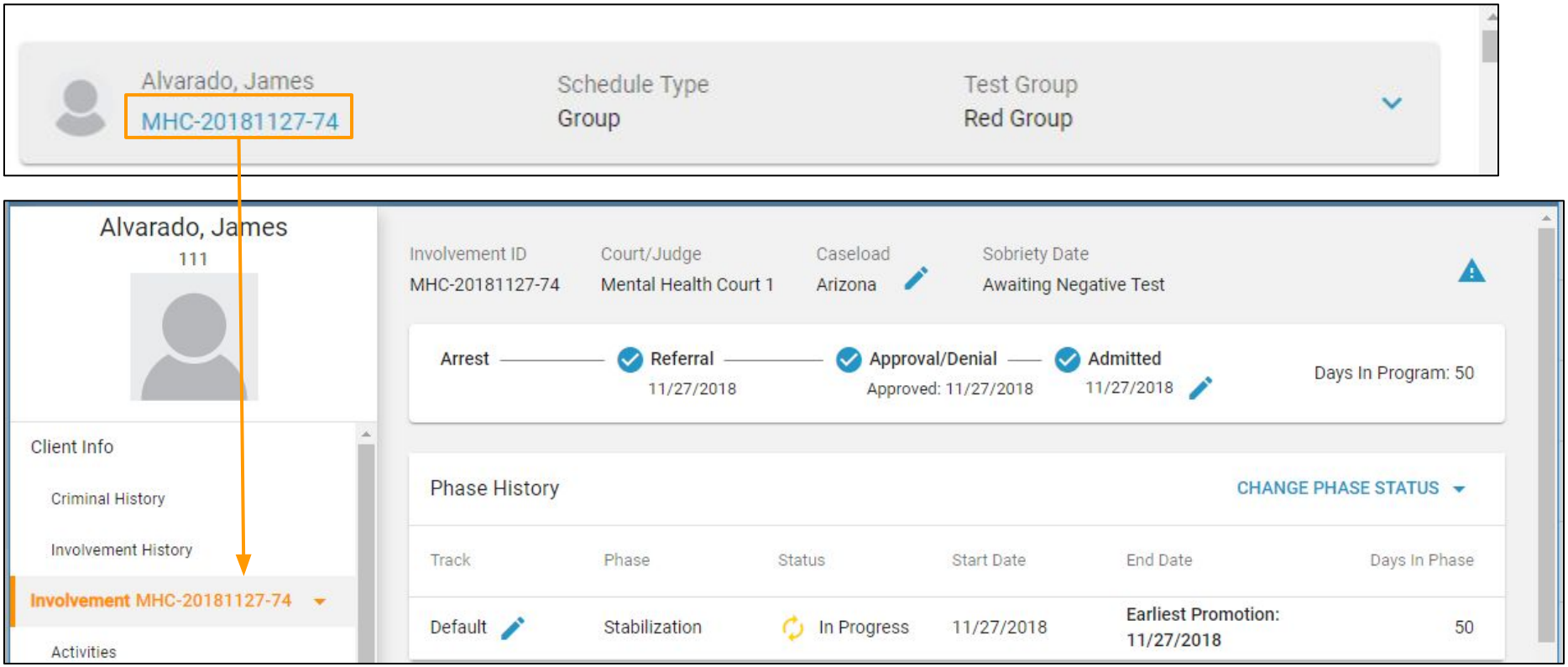
AutoMon | Drug Testing - Overview

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.



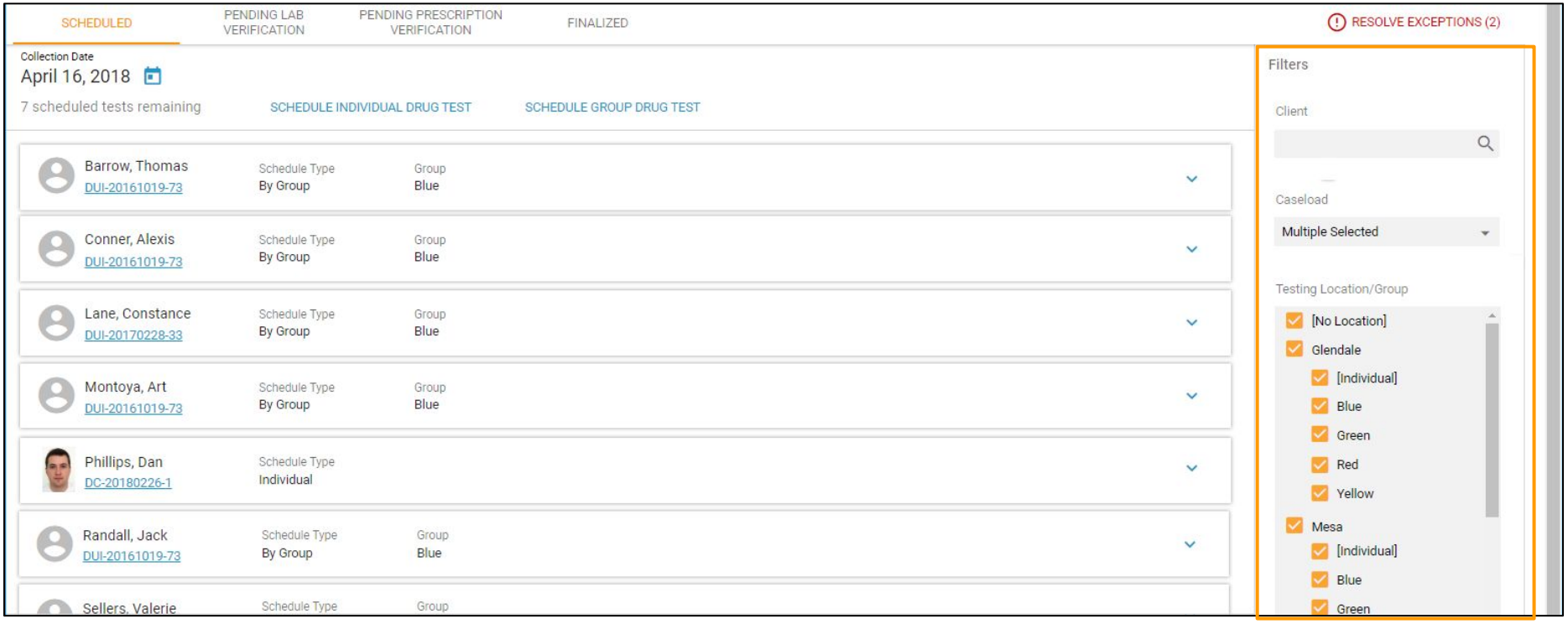
AutoMon | Drug Testing - Client's Involvement

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



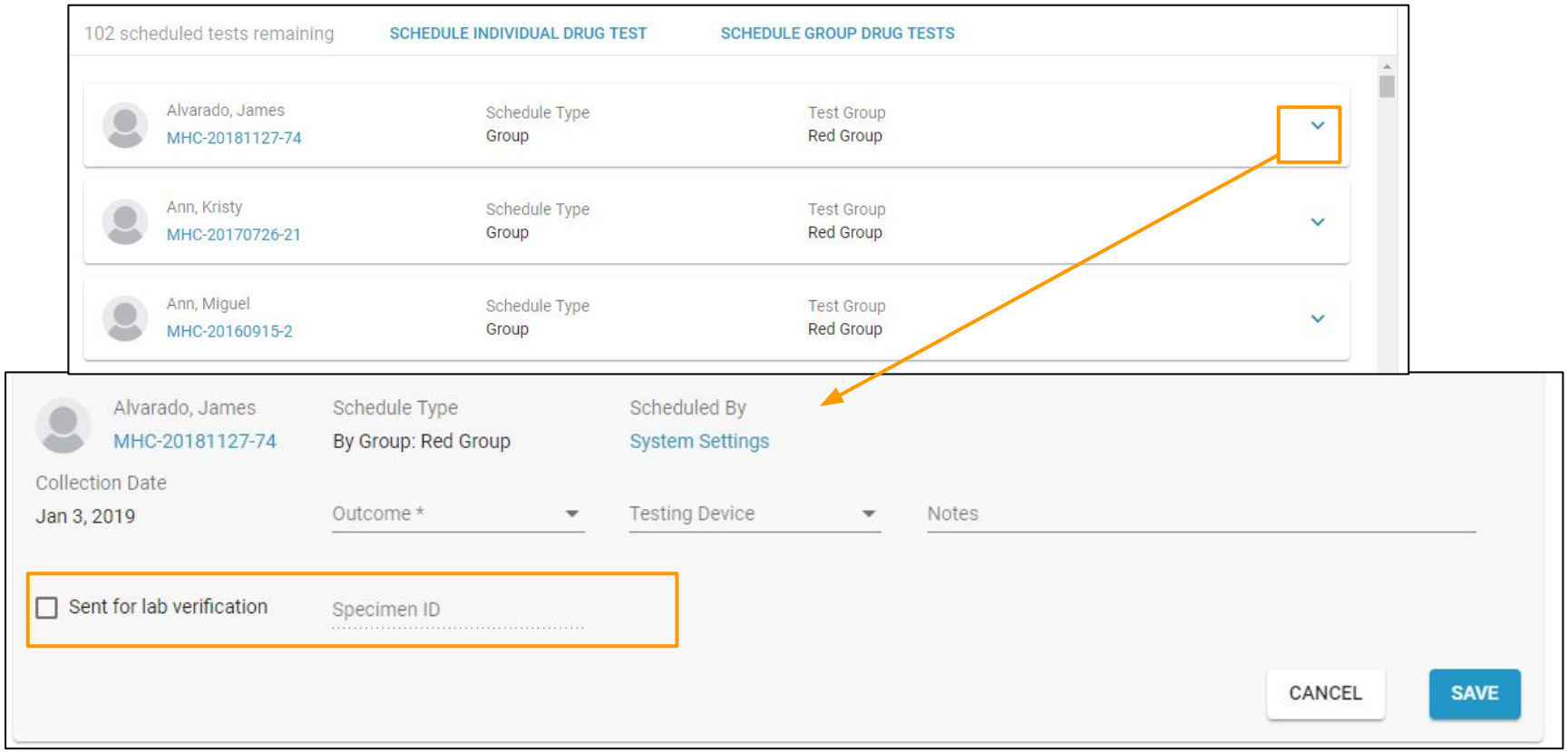
AutoMon | Drug Testing - Filtering

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.



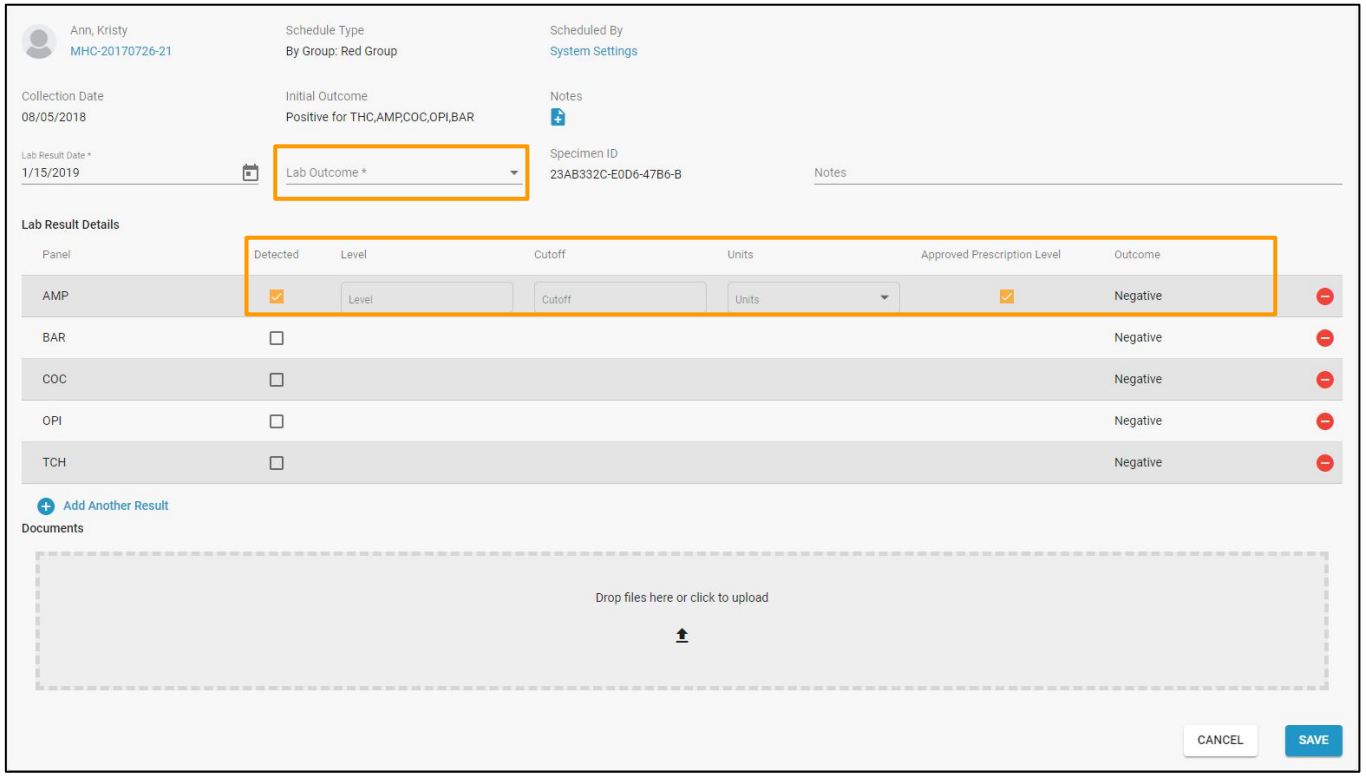
Drug Testing - Completing A Test

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.



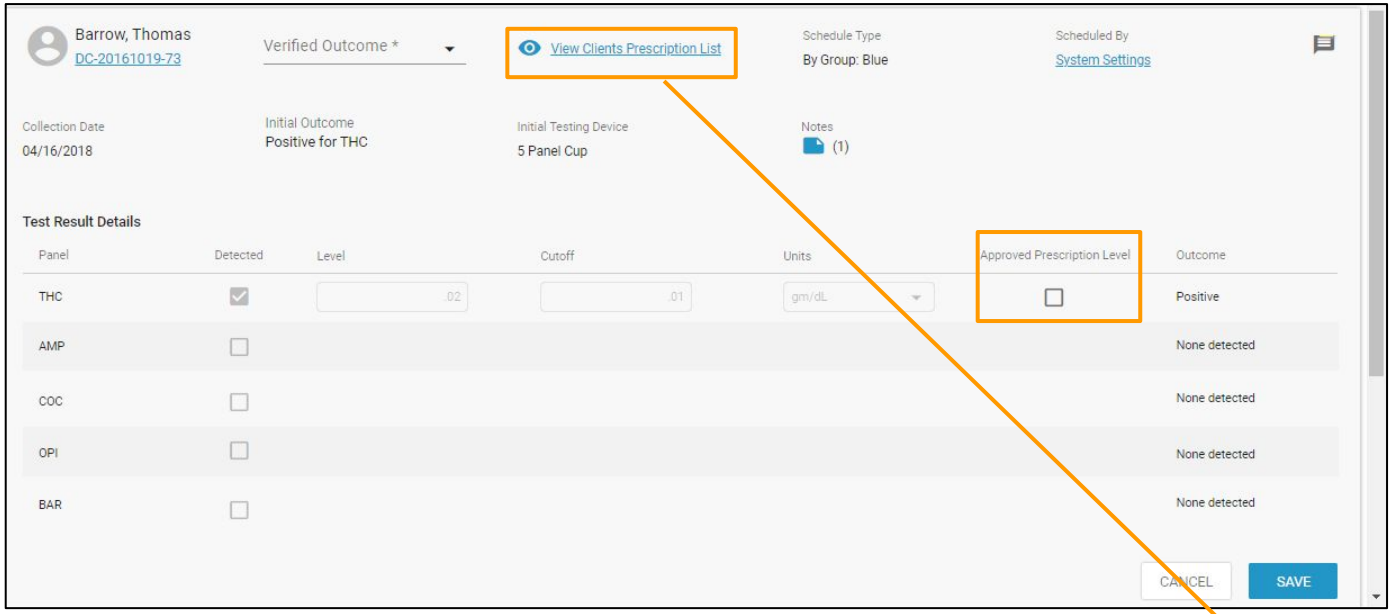
Drug Testing - Marking Lab Results

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.



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.



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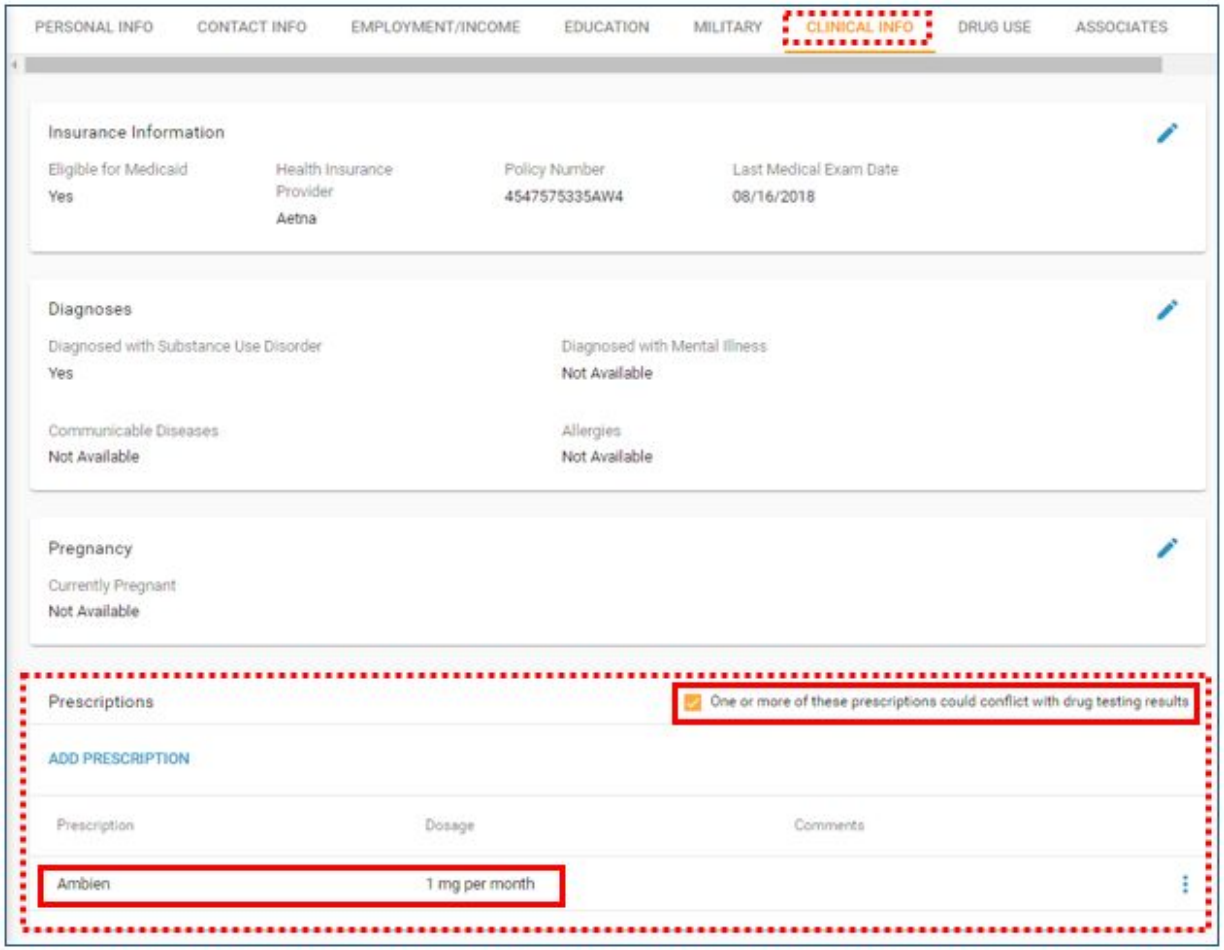
Drug Testing - Pending Prescription Verification

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.



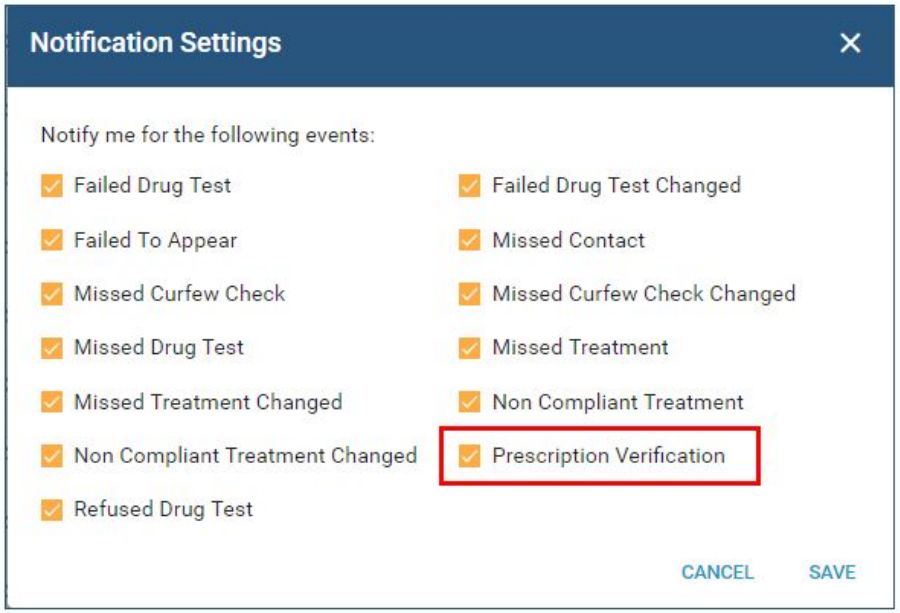
Drug Testing - Pending Prescription Verification

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.



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.

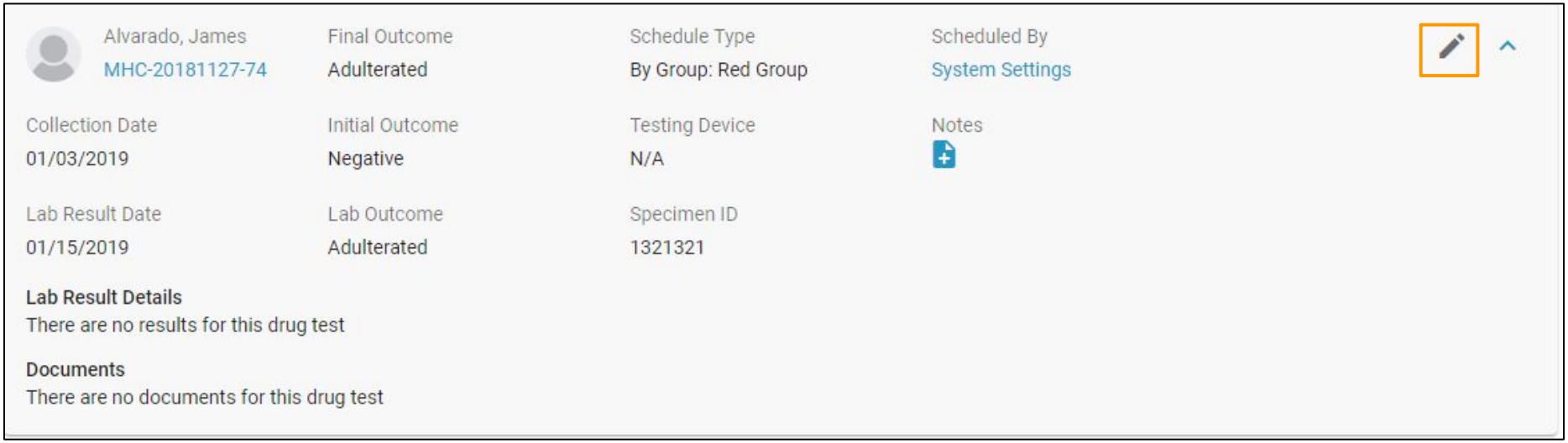
All other fields are disabled – Verified outcome options are ***only*** Negative, Positive, Diluted, Adulterated or Admitted

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.

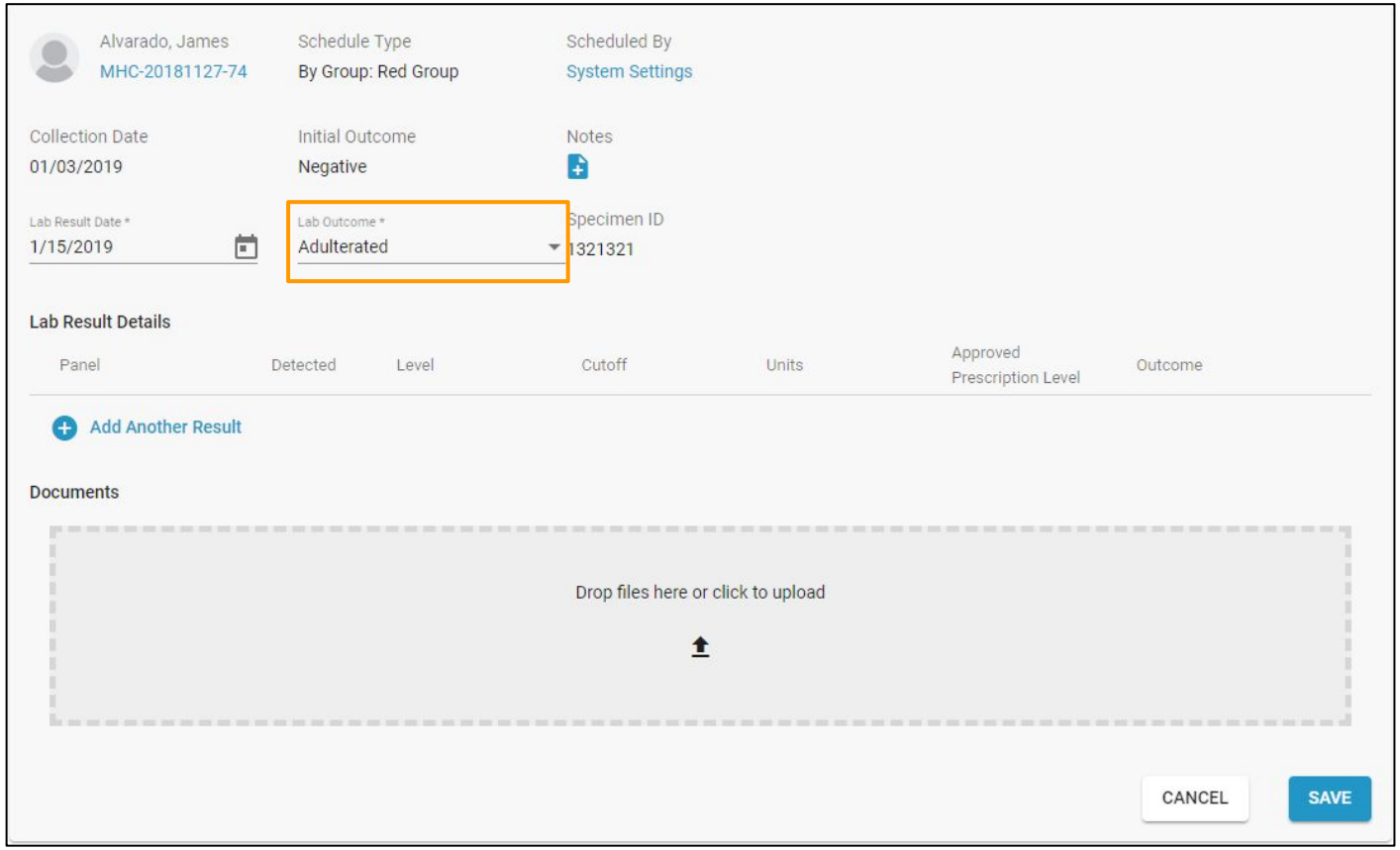
Drug Testing - Viewing/Editing Finalized Tests

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.



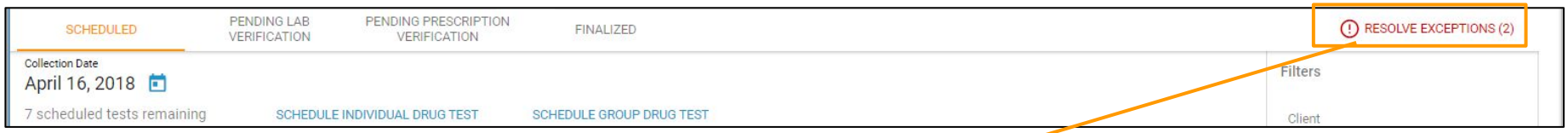
Drug Testing - Viewing/Editing Finalized Tests

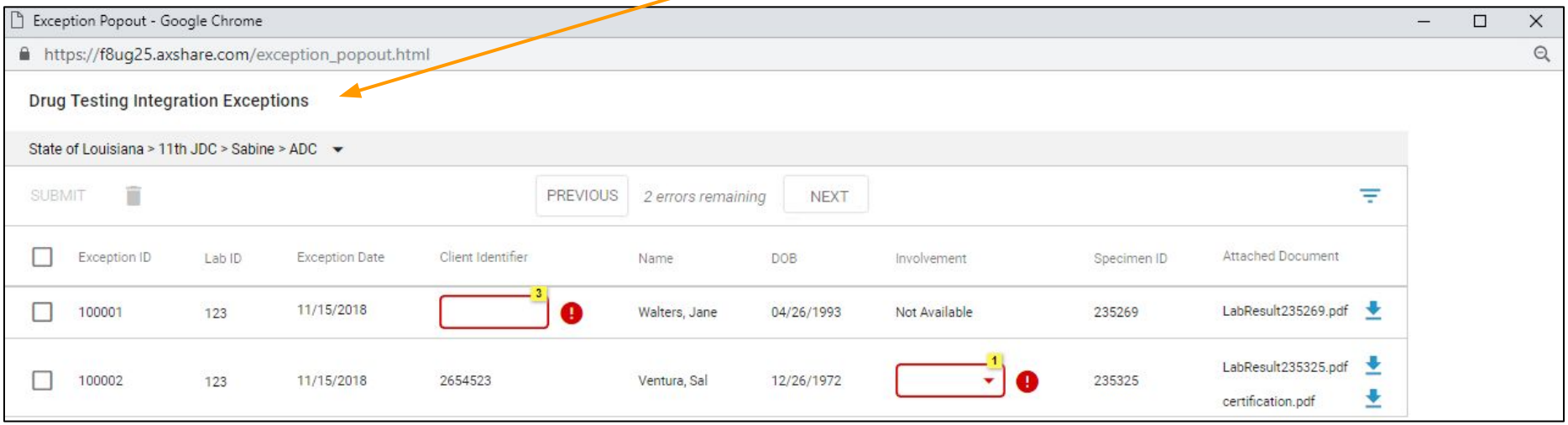
Once in Edit mode, Users can then update the last outcome of the test, add another panel, change the panel, and upload documents.



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.





Topic 7: Hearings

Back to Topics

Subtopics:

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

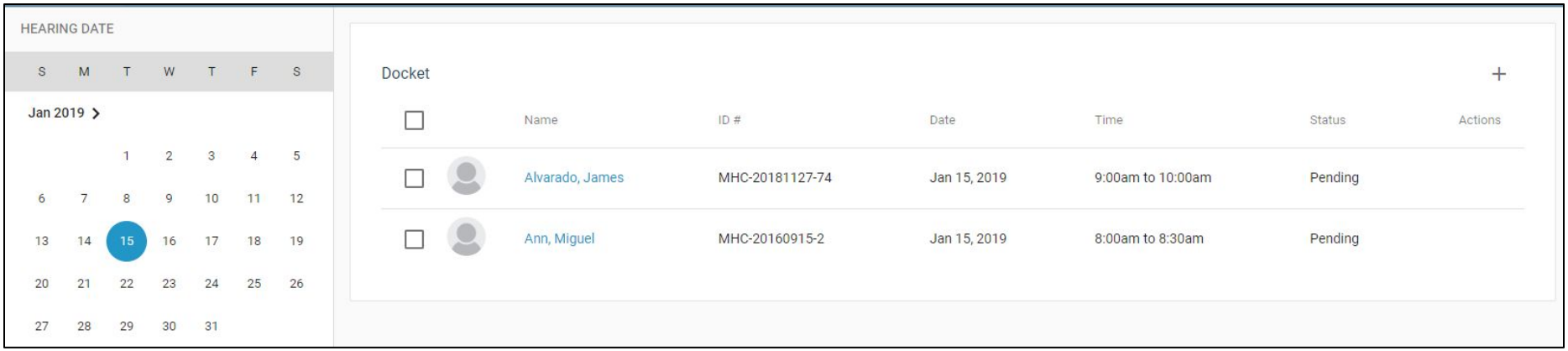
Hearings - Overview

Back to Topics

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

Hearings - Filtering

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



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.”

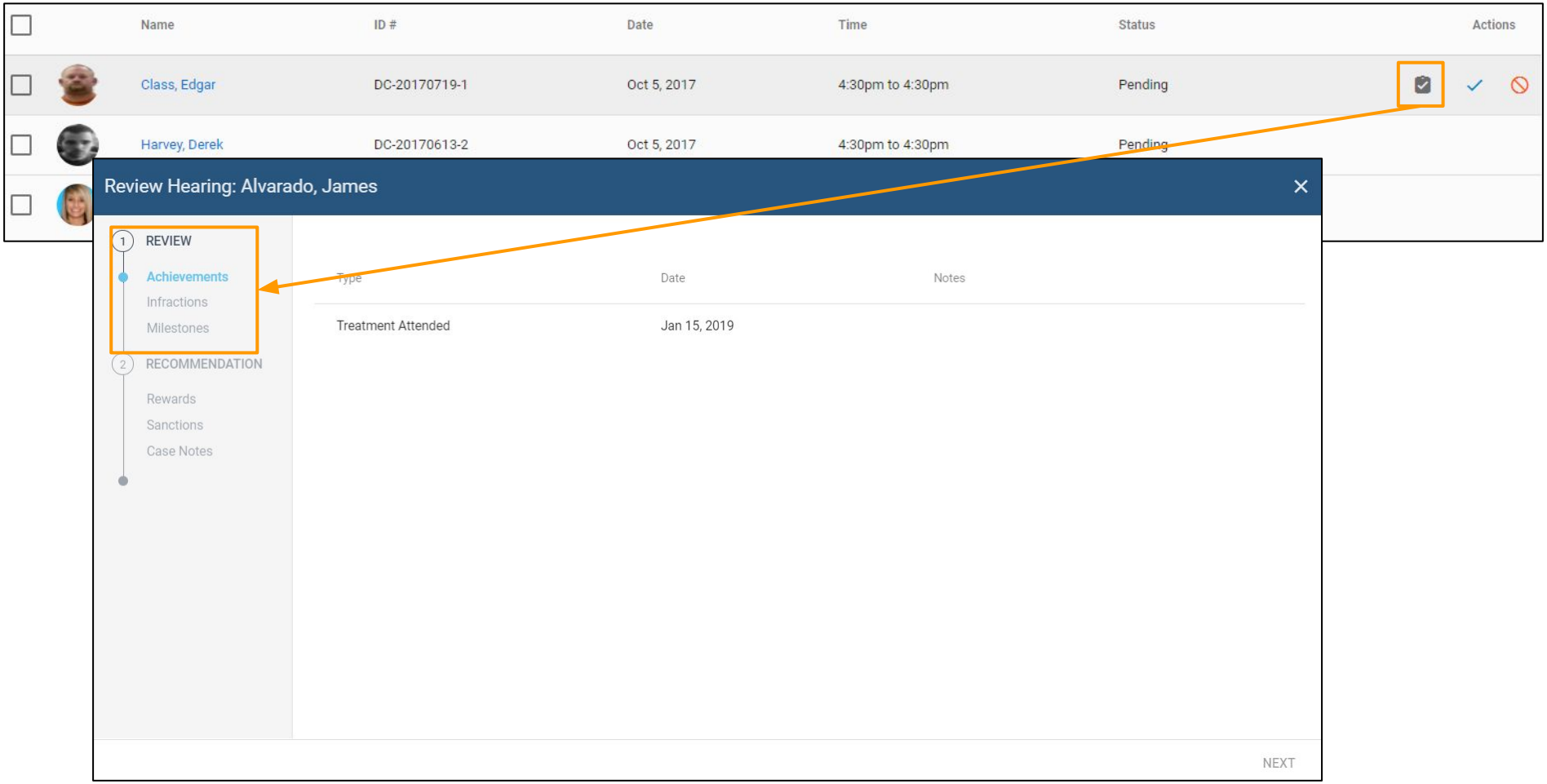
Hearings - Icons

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

	Name	ID #	Date	Time	Status	Actions
	Class, Edgar	DC-20170719-1	Oct 5, 2017	4:30pm to 4:30pm	Pending	
	Harvey, Derek	DC-20170613-2	Oct 5, 2017	4:30pm to 4:30pm	Pending	
	Stark, Sansa	DC-20170706-1	Oct 5, 2017	4:30pm to 4:30pm	Pending	

Hearings - Completing a Review

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



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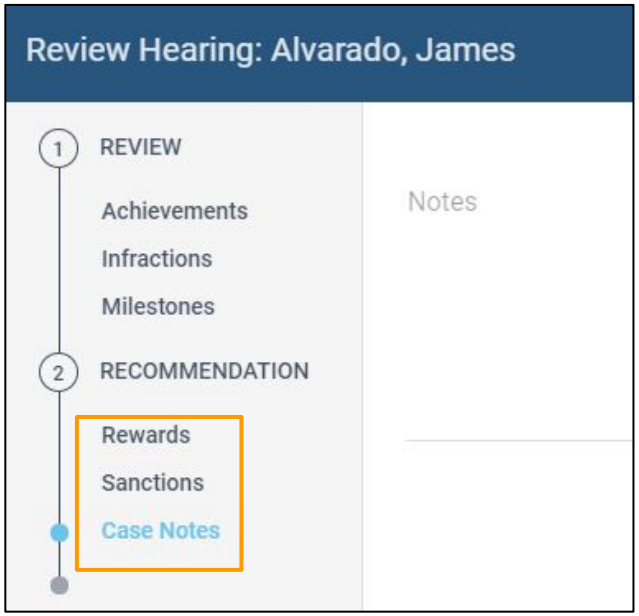
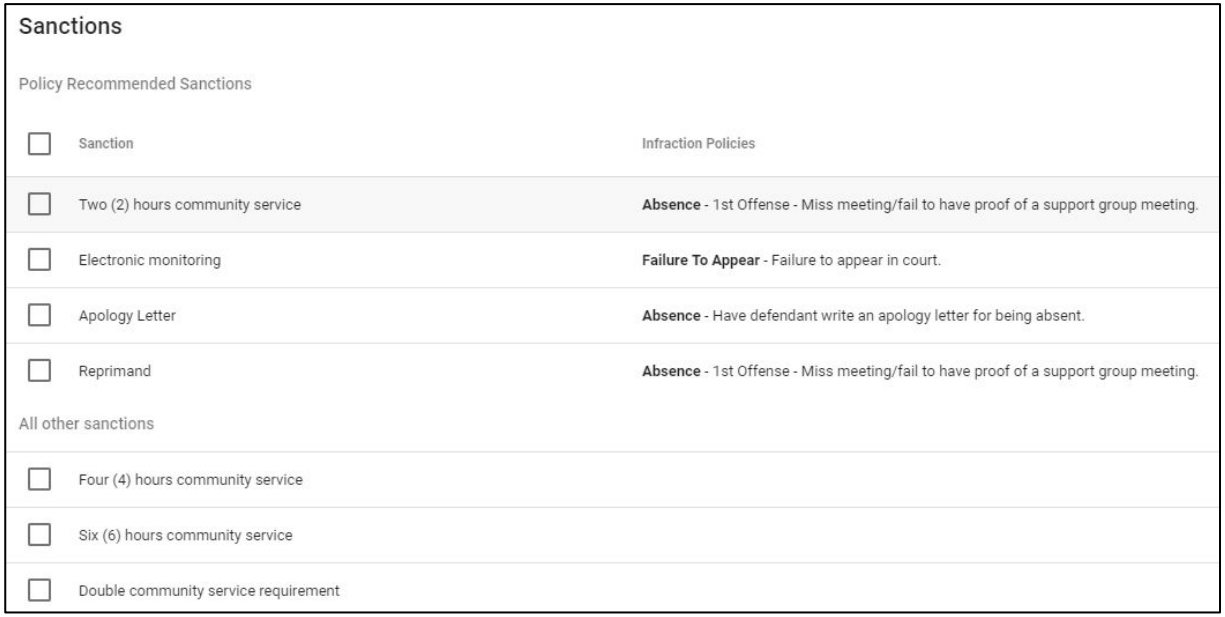
Hearings - Review Recommendations

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.





Topic 8: Curfew Check

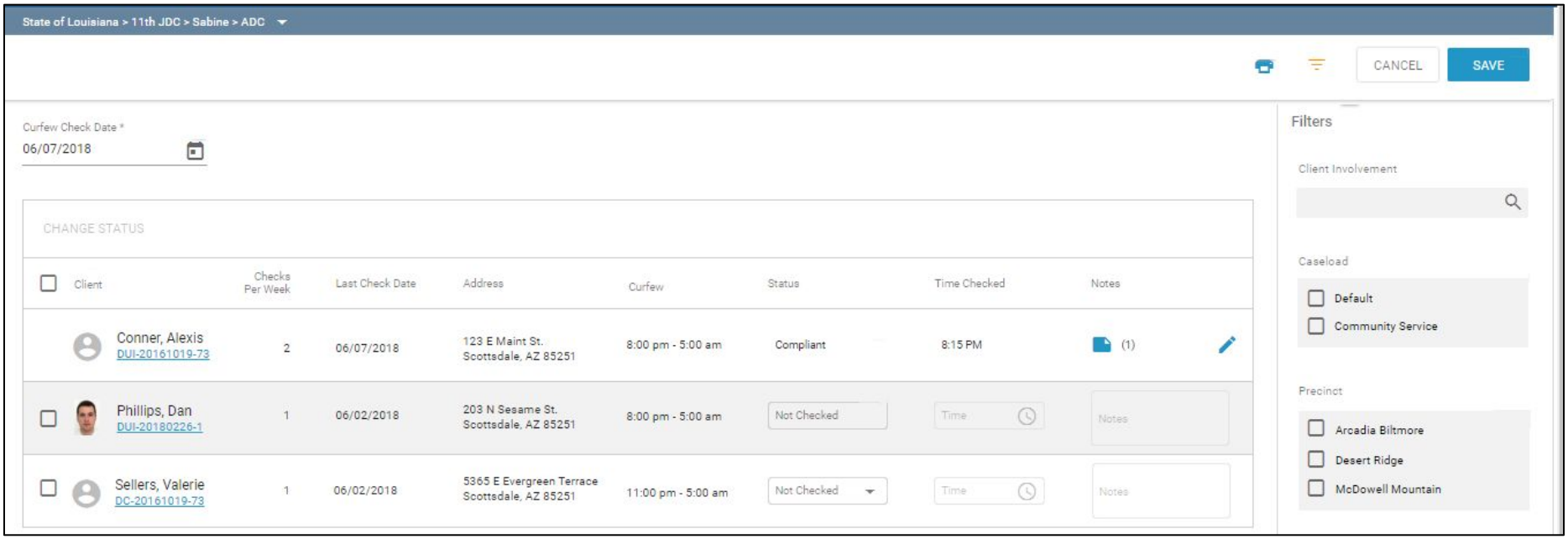
Back to Topics

Subtopics:

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

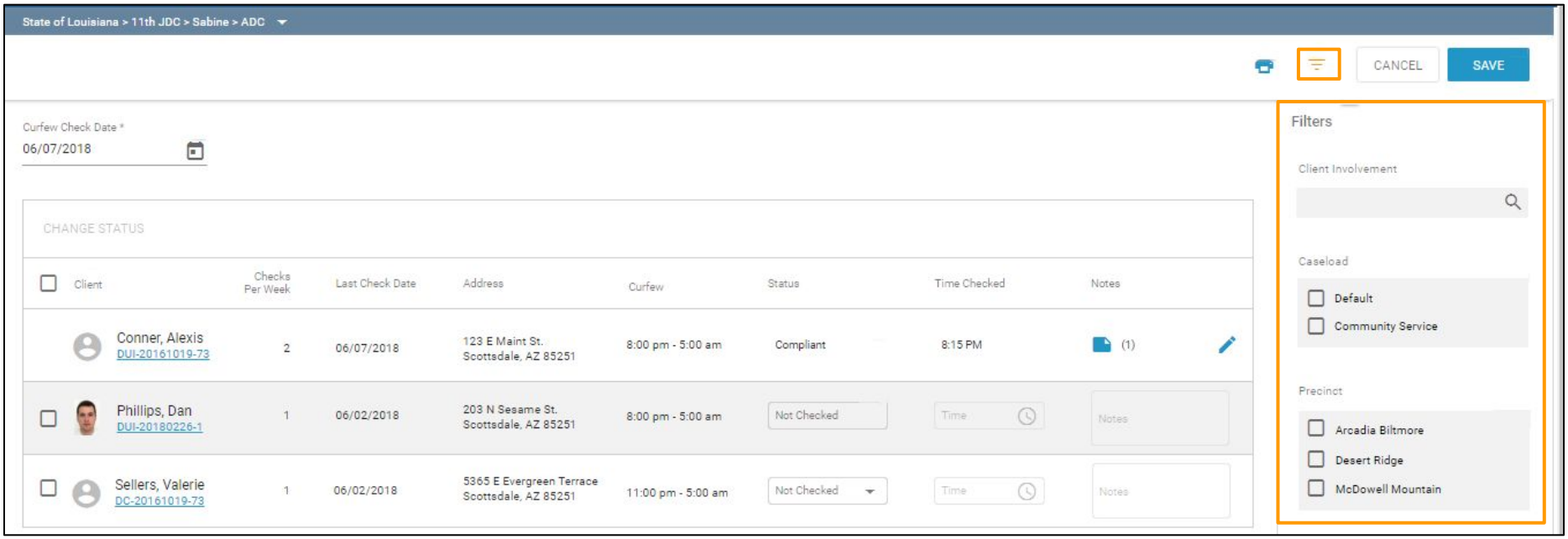
AutoMon | Curfew Check - Overview

Once a Client has be 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.



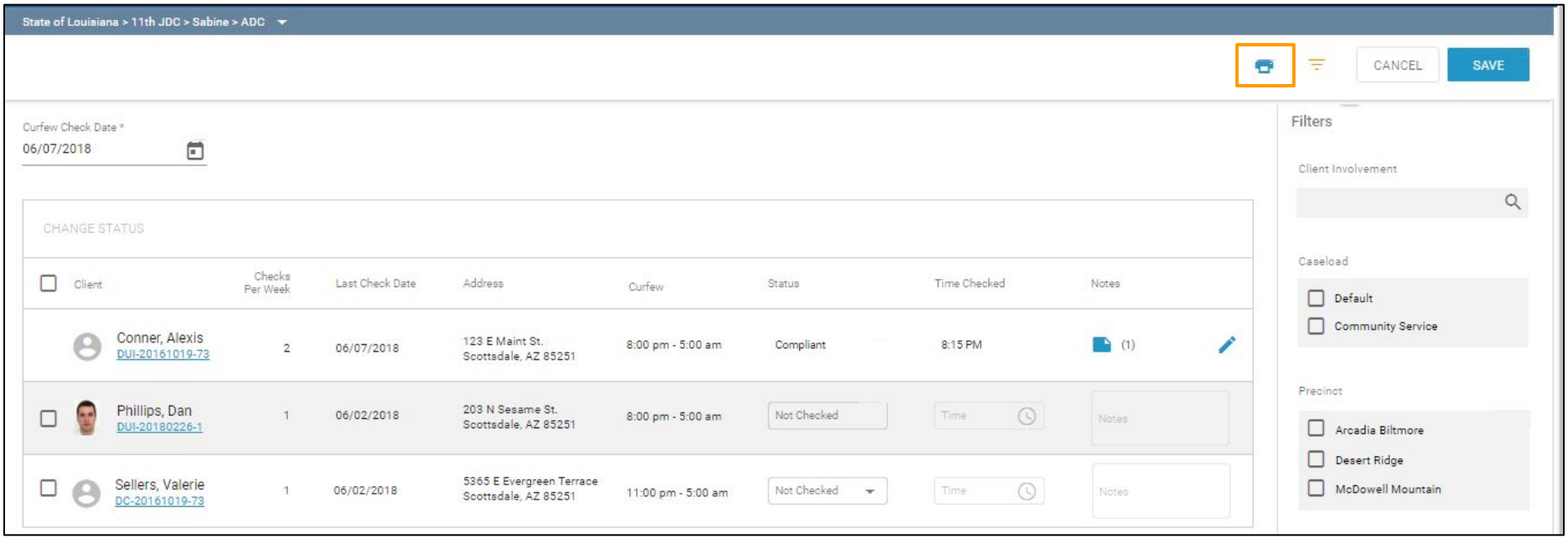
AutoMon | Curfew Check - Filters

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



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.



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

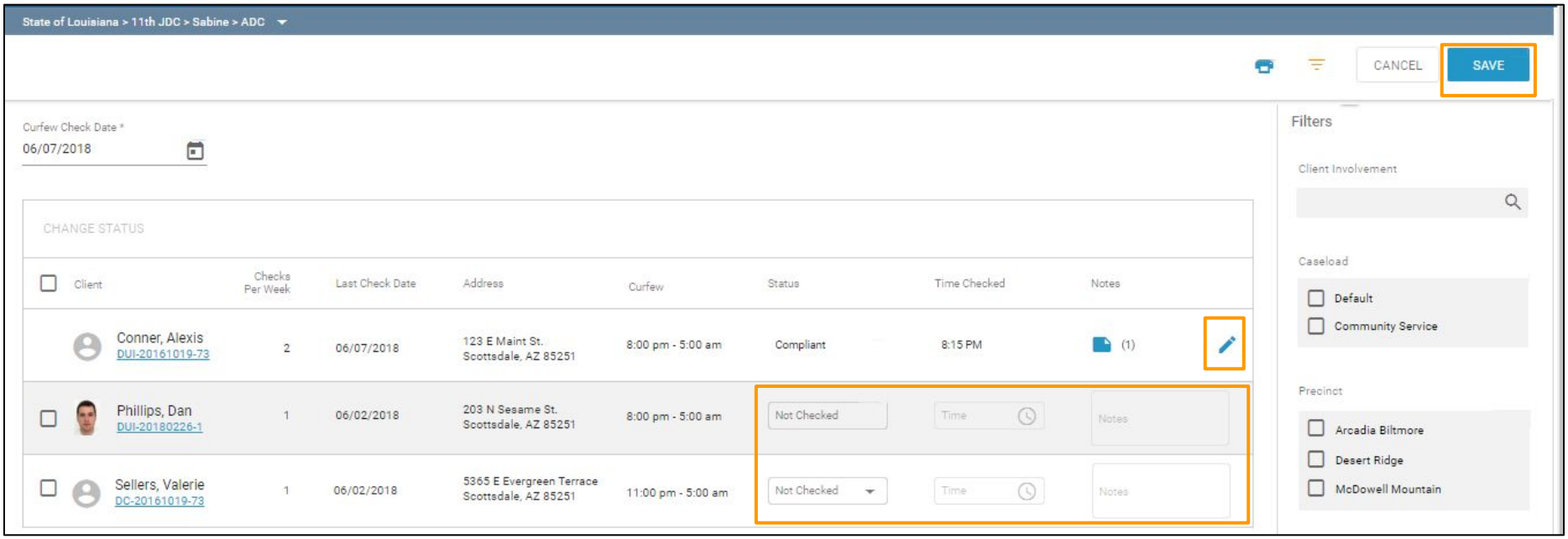
Louisiana 11th JDC DUI Court

Caseload	Precinct	Client
All	Arcadia Biltmore	All

Client	Checks Per Week	Last Check Date	Address/Phone	Curfew	Status	Time Checked	Notes
Conner, Alexis DUI-20161019-73 Female	2	06/07/2018	123 E Maint St. Scottsdale, AZ 85251 555-555-1234	8:00 pm - 5:00 am	☐ Compliant ☐ Missed ☐ Excused		
 Phillips, Dan DUI-20180226-1 Male	1	06/02/2018	203 N Sesame St. Scottsdale, AZ 85251 555-555-5555	8:00 pm - 5:00 am	☐ Compliant ☐ Missed ☐ 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.



Topic 9: Treatment/Education Attendance

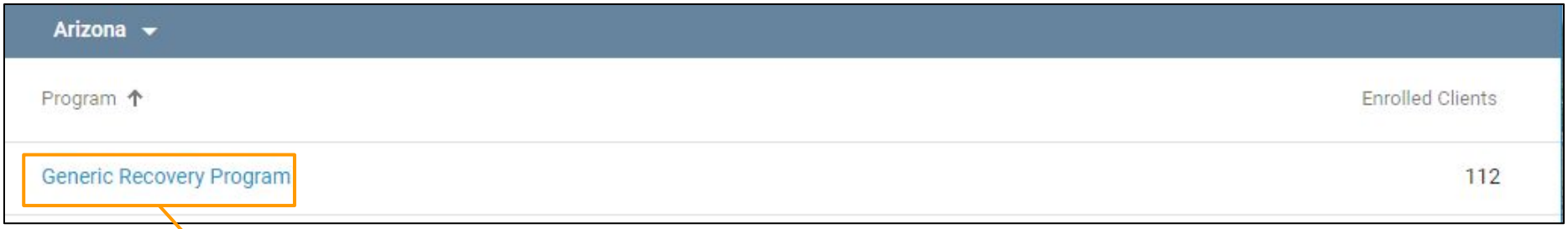
Back to Topics

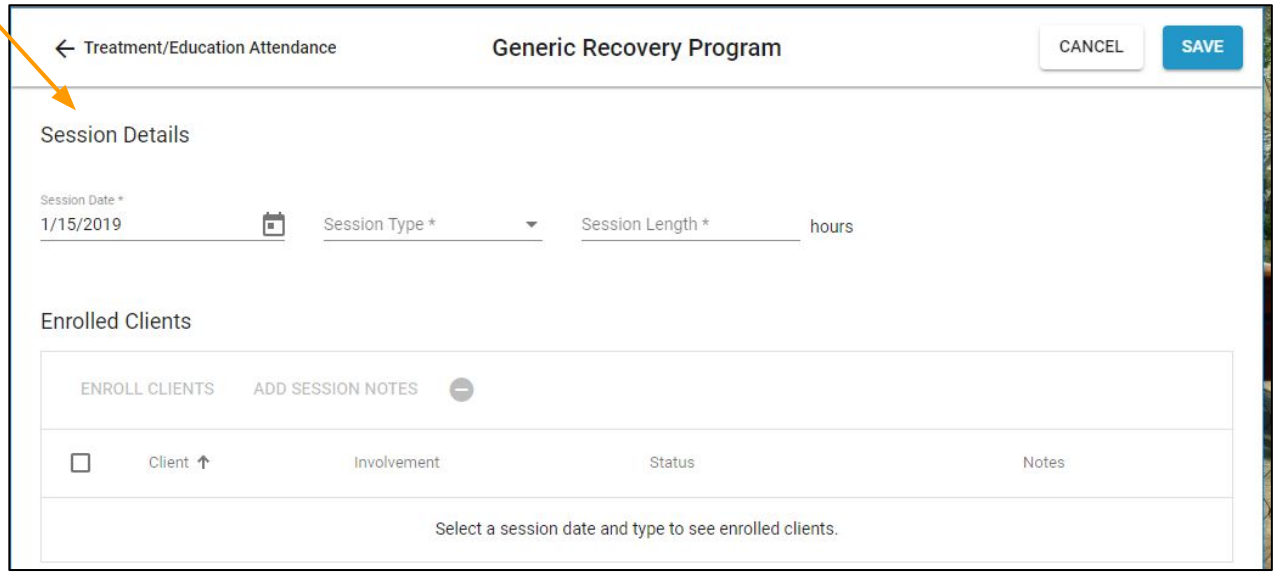
Subtopics:

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

AutoMon | Treatment/Education Attendance - Overview

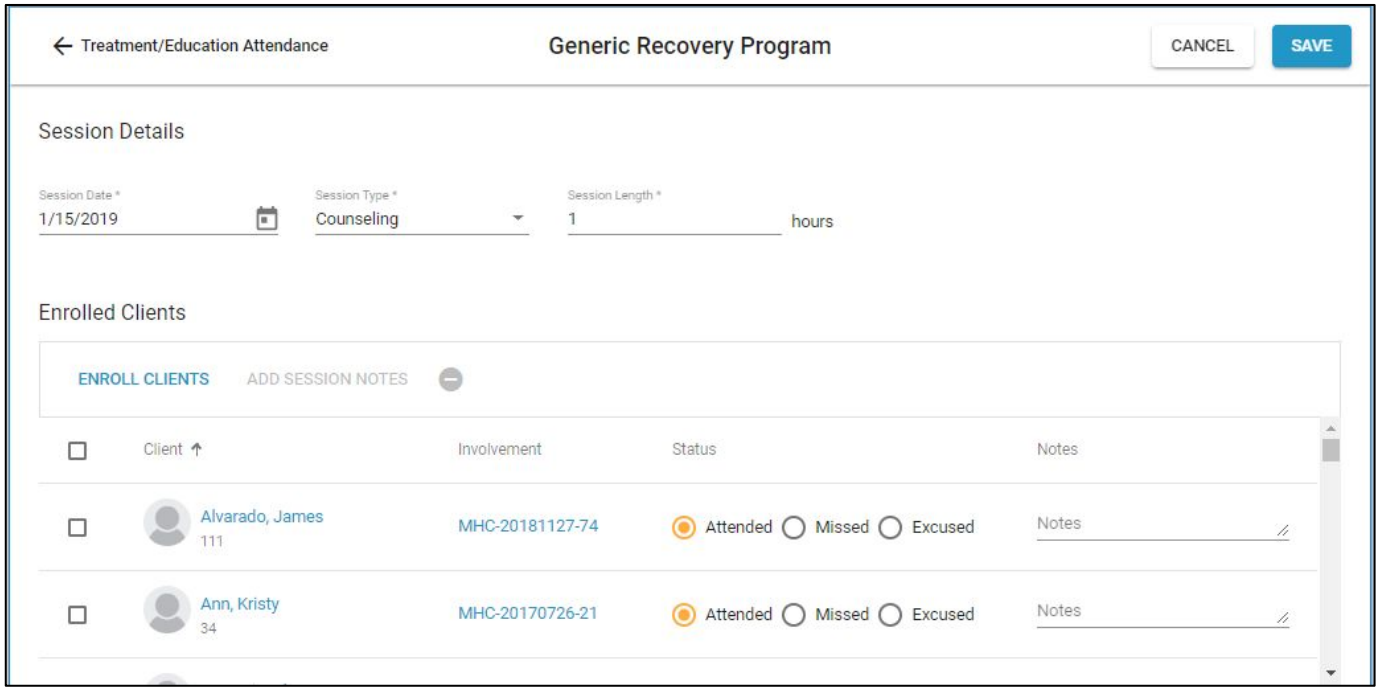
Clicking on the **Treatment/Education Attendance** task option will allow Users to record attendance and/or enroll Clients into a Program. This functionality supports batch session notes and batch attendance.





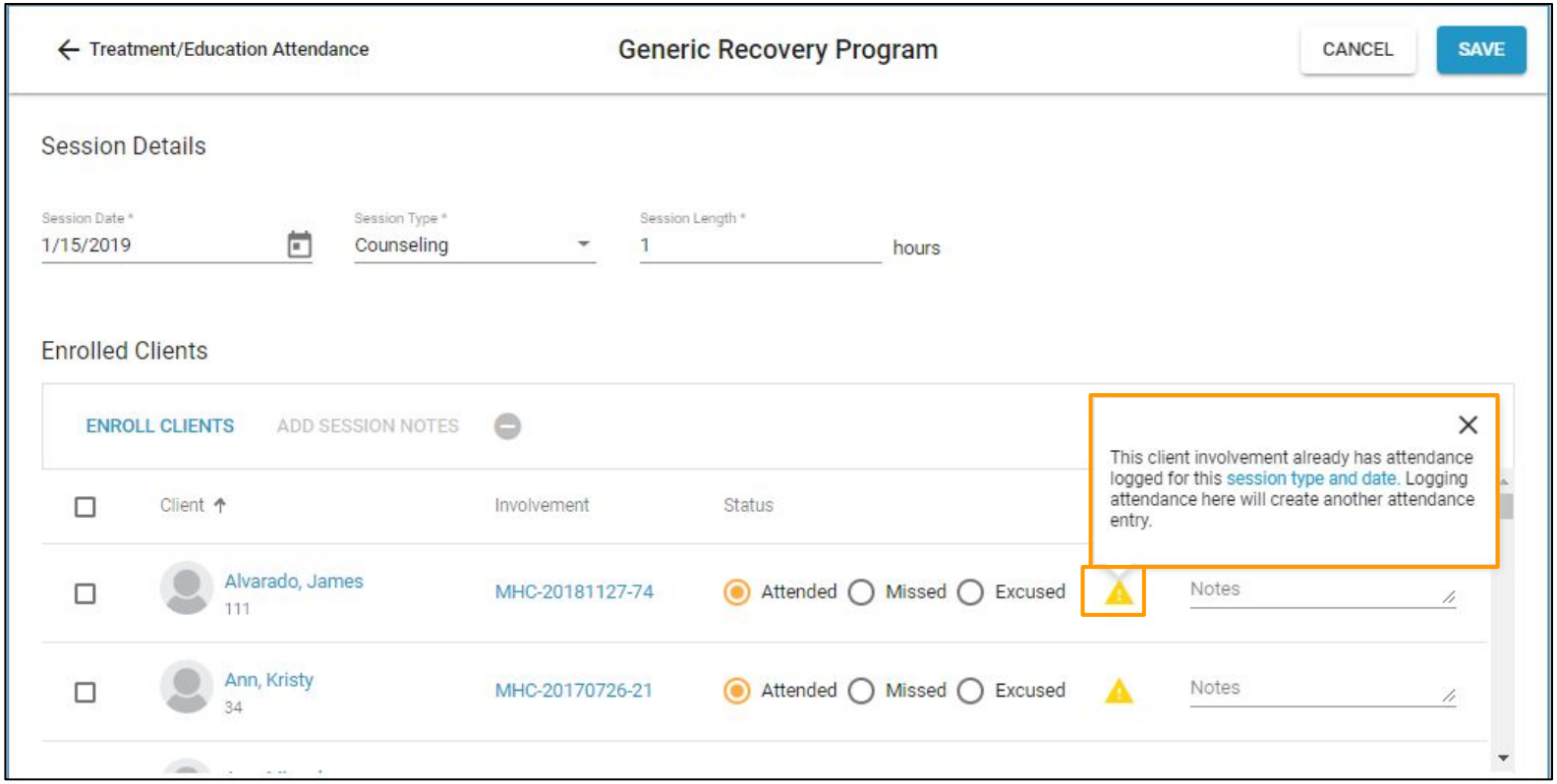
Treatment/Education Attendance - Marking Attendance

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.



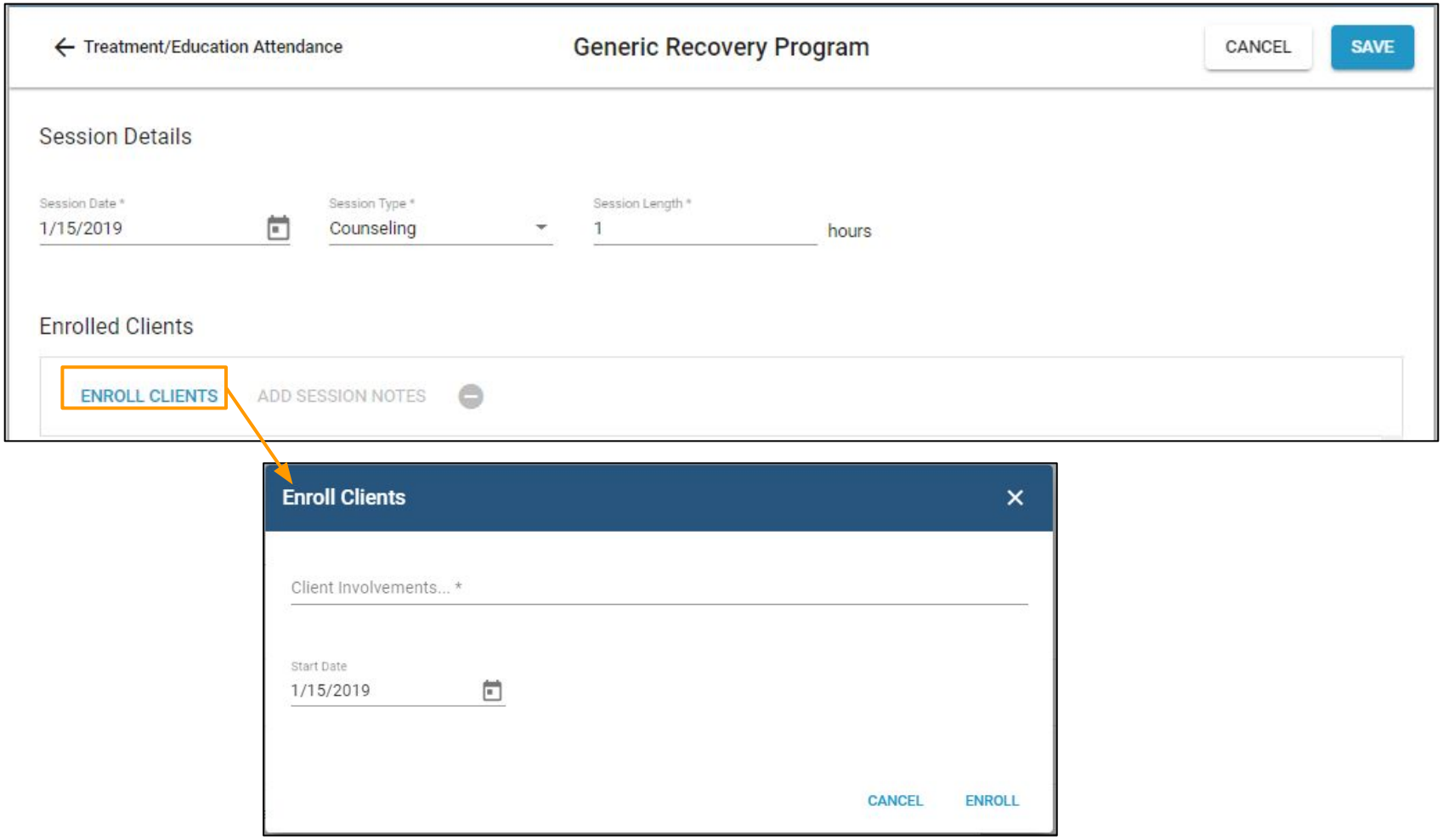
Treatment/Education Attendance - Marking Attendance

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.



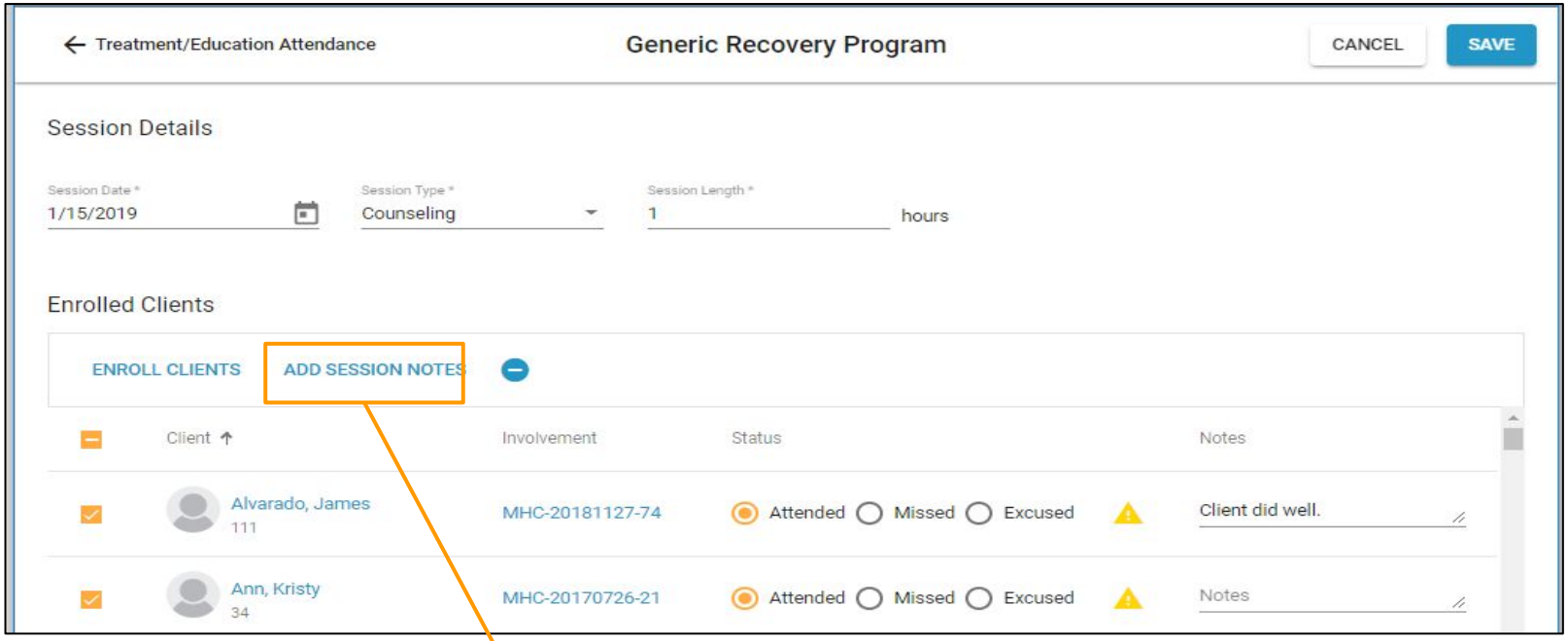
AutoMon | Treatment/Education Attendance - Enroll Clients

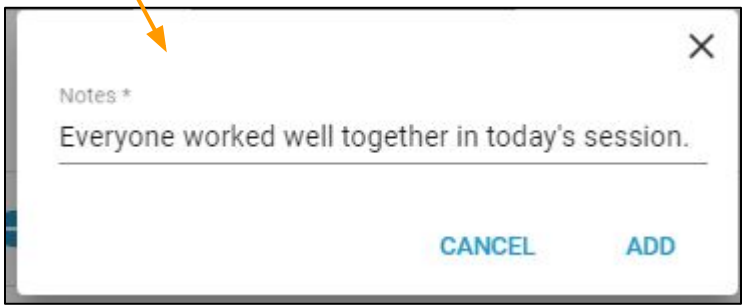
Users can also Enroll Clients from the attendance screen by clicking on the *Enroll Clients* link. Users can enroll Clients from the Client's Involvement profile, as well.



Treatment/Education Attendance - Batch Session Notes

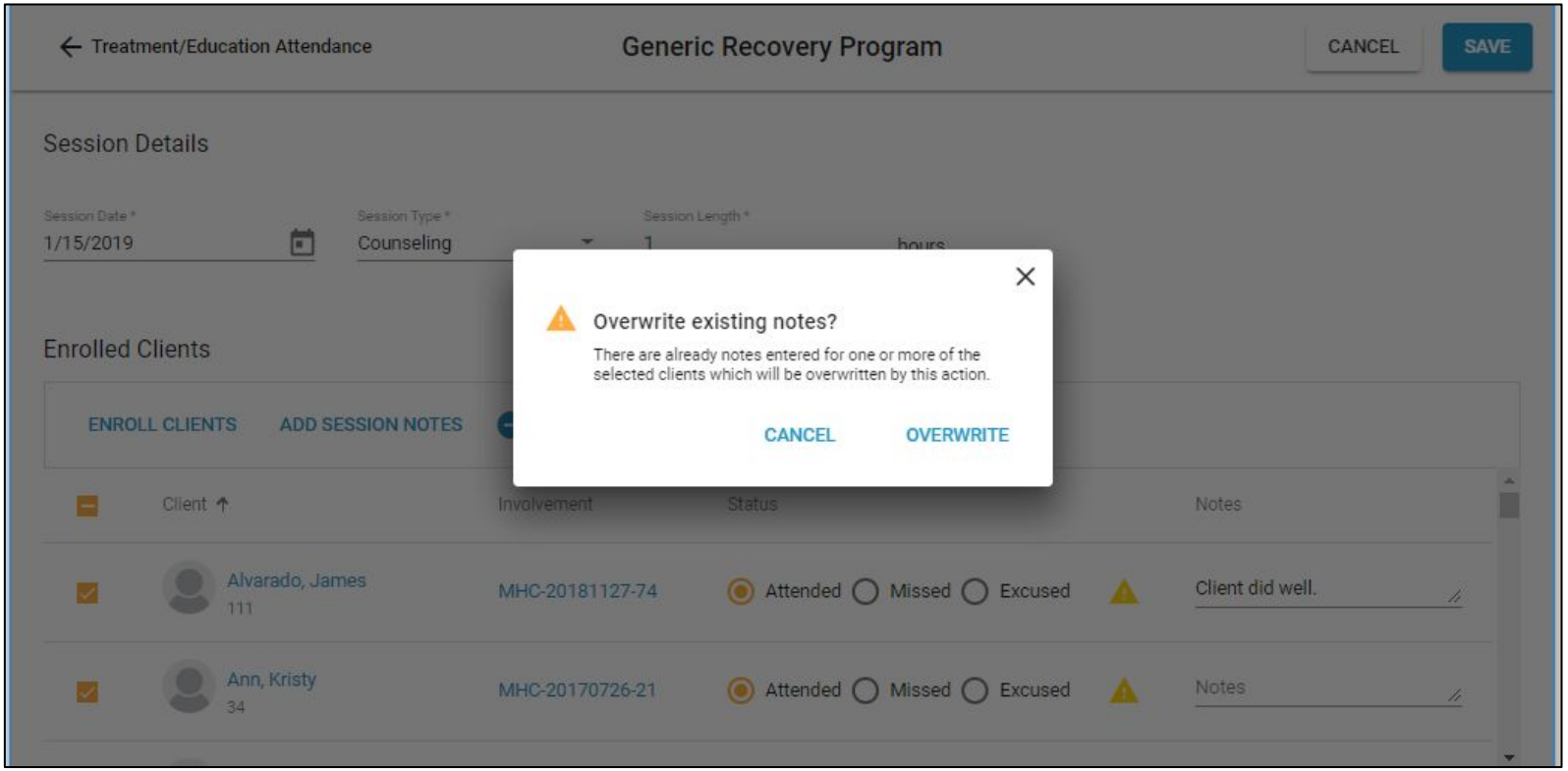
Users have the ability to enter Batch Session Notes when marking attendance. Once the User selects at least one client, the 'Add Session Notes' hyperlink is enabled.





Treatment/Education Attendance - 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.



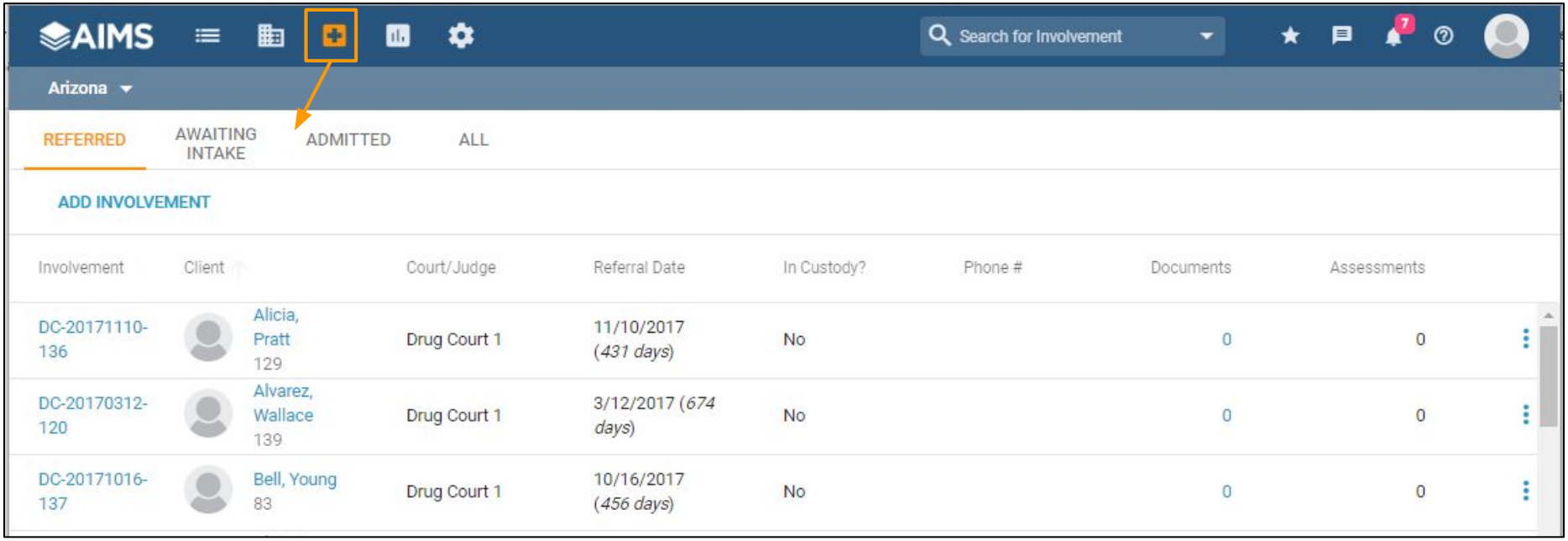
Topic 10: Specialty Courts

Back to Topics

Subtopics:

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

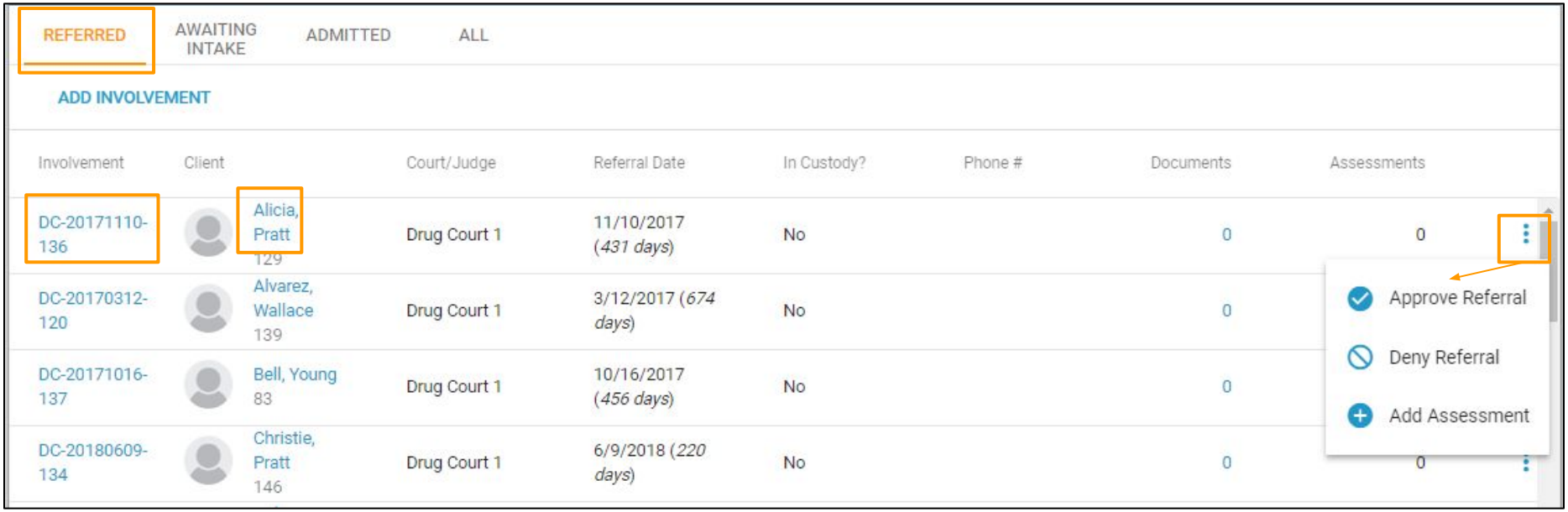
Users can click on the **Specialty Courts** icon in order to navigate to the Specialty Courts listing views. Users can also add an involvement from this screen. The New Involvement will be covered in more detail later in this guide.



Specialty Courts - Referred

Back to Topics

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.

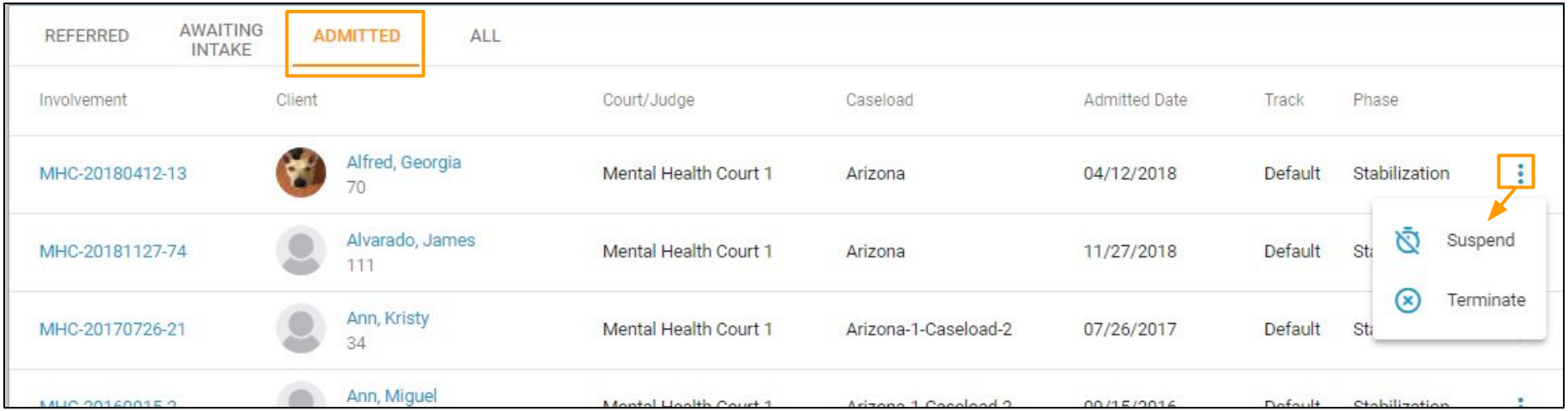


Specialty Courts - Awaiting Intake

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.

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.



Specialty Courts- All

Back to Topics

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

REFERRED | AWAITING INTAKE | ADMITTED | ALL

ADD INVOLVEMENT

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

Topic 11: Reporting

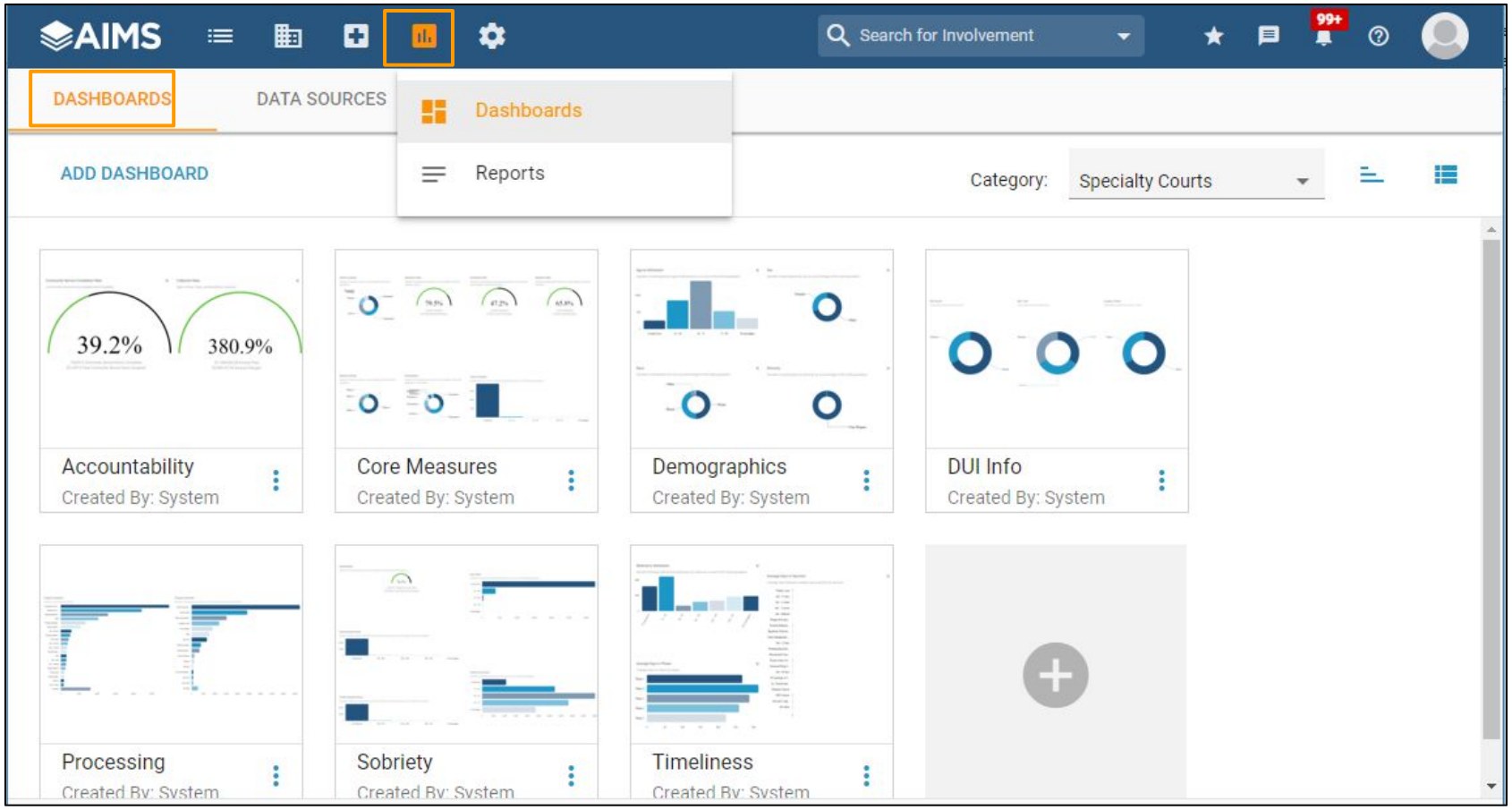
Back to Topics

Subtopics:

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

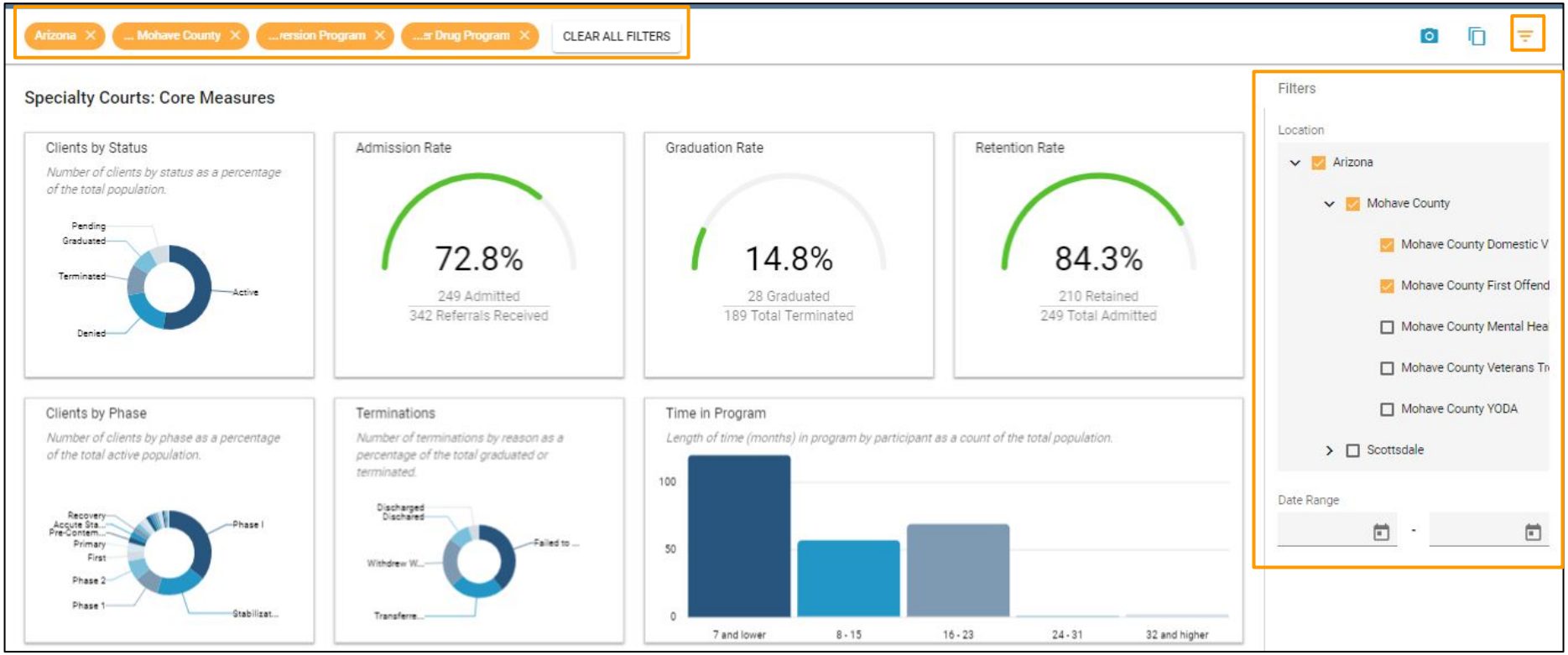
Reporting - Dashboards

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.



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

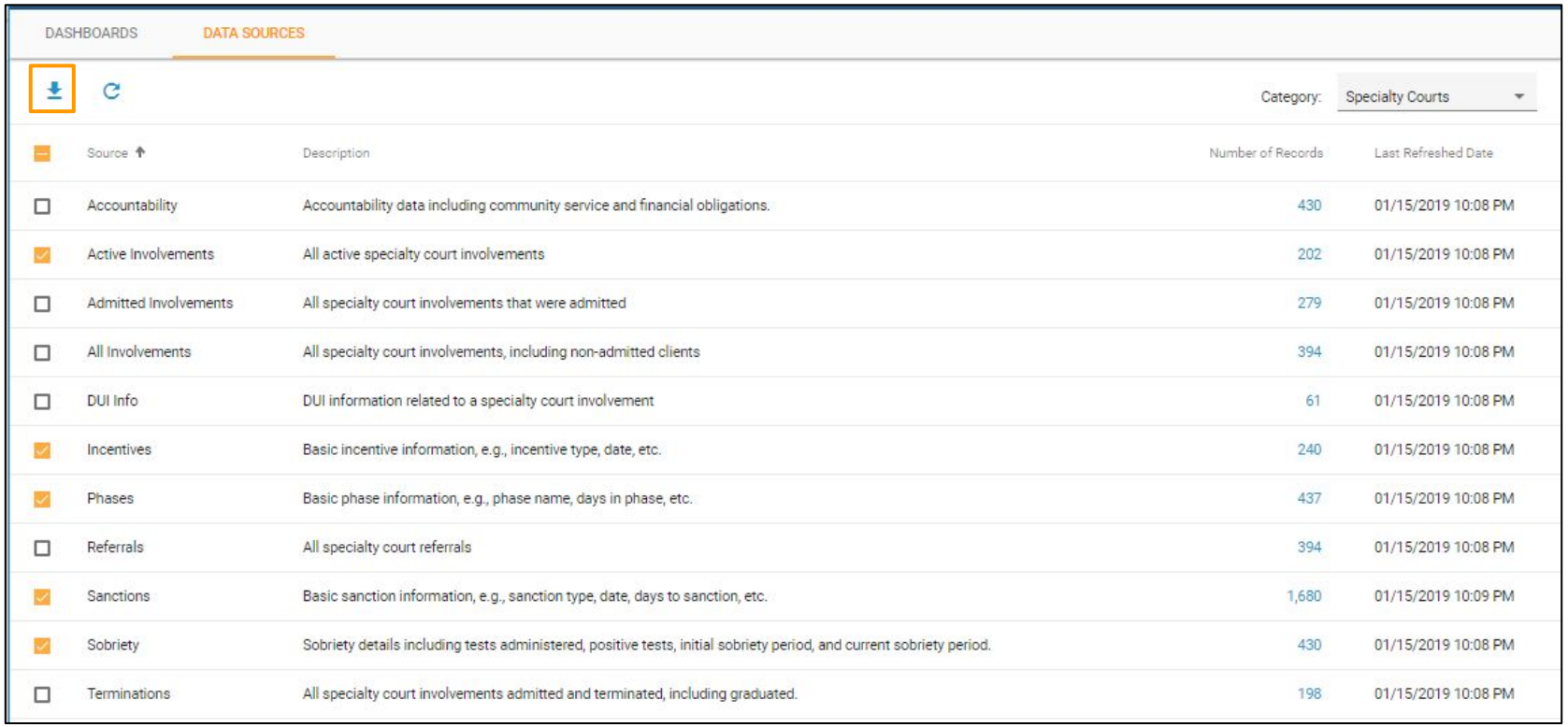
Category: Specialty Courts

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

Reporting - Exporting Data

Back to Topics

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.



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

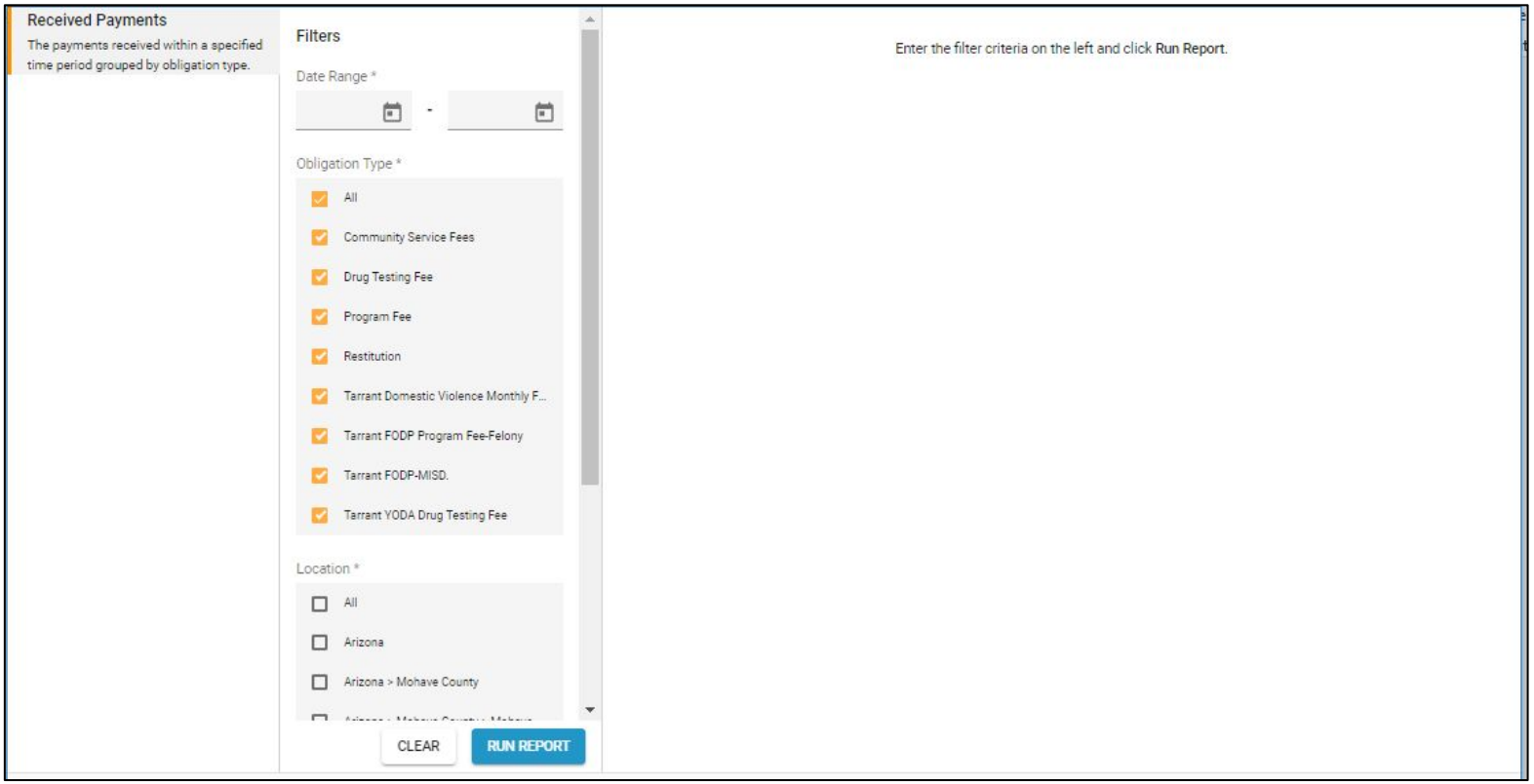
Active Involvements

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

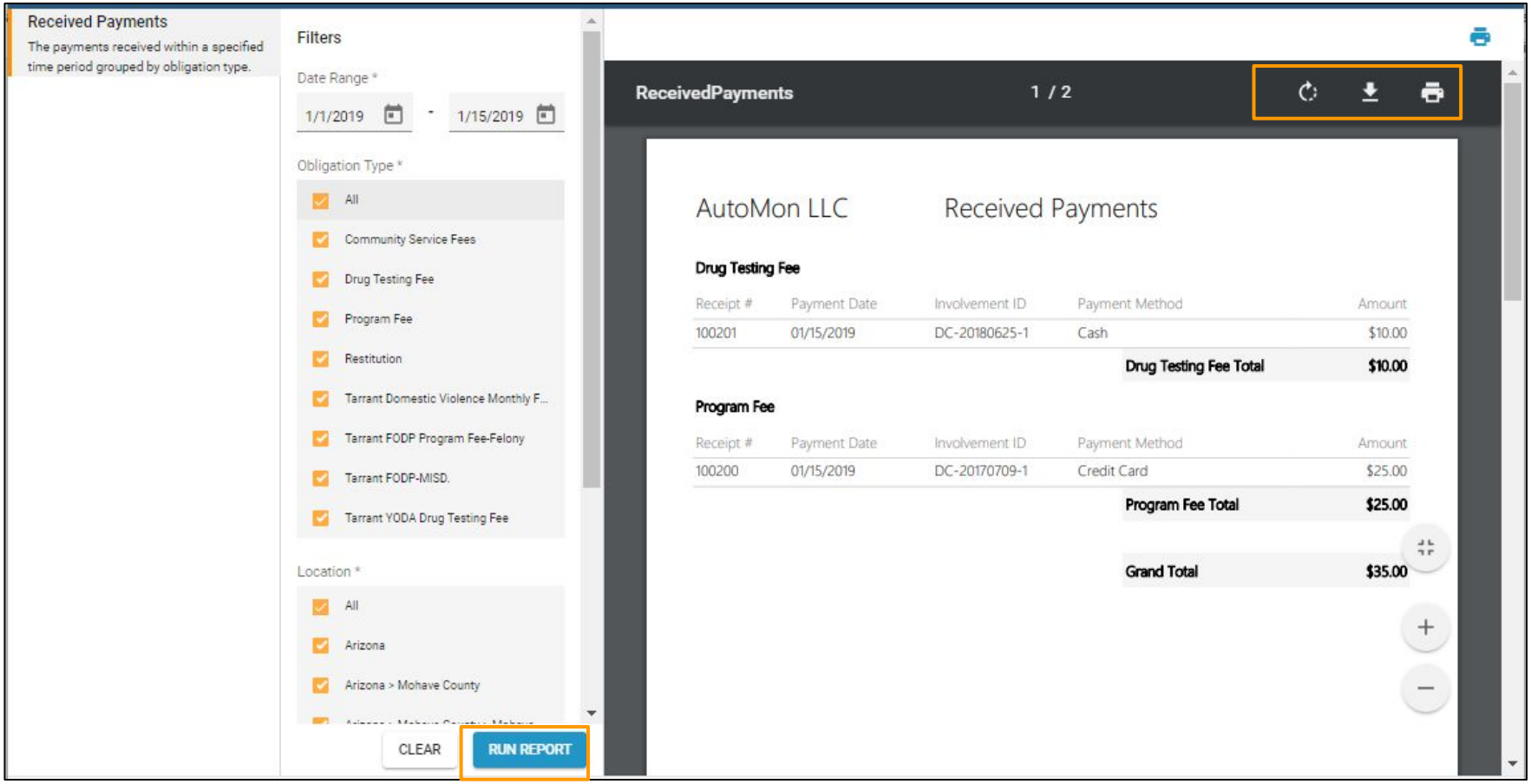
Reporting - Reports

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.



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.



Topic 12: Client's Profile

Back to Topics

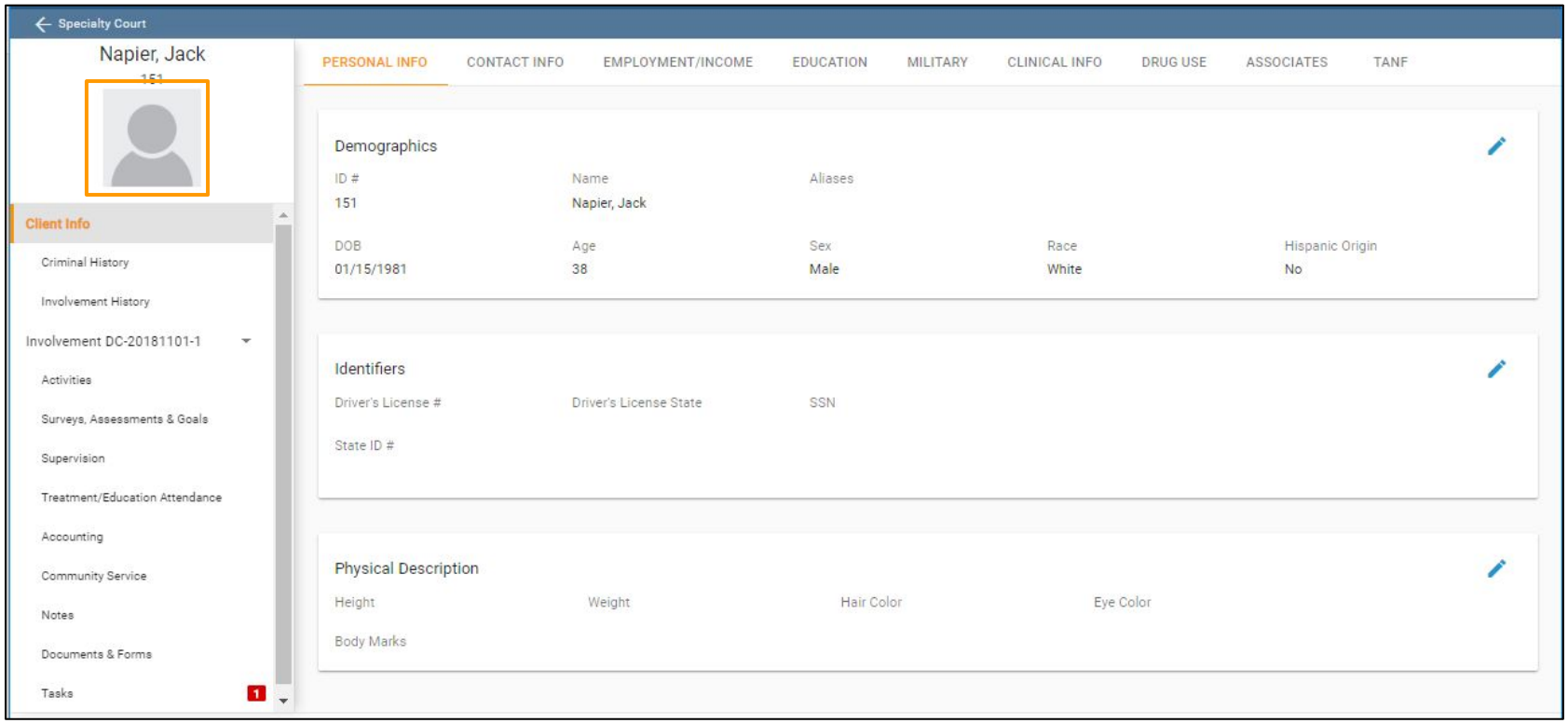
Subtopics:

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

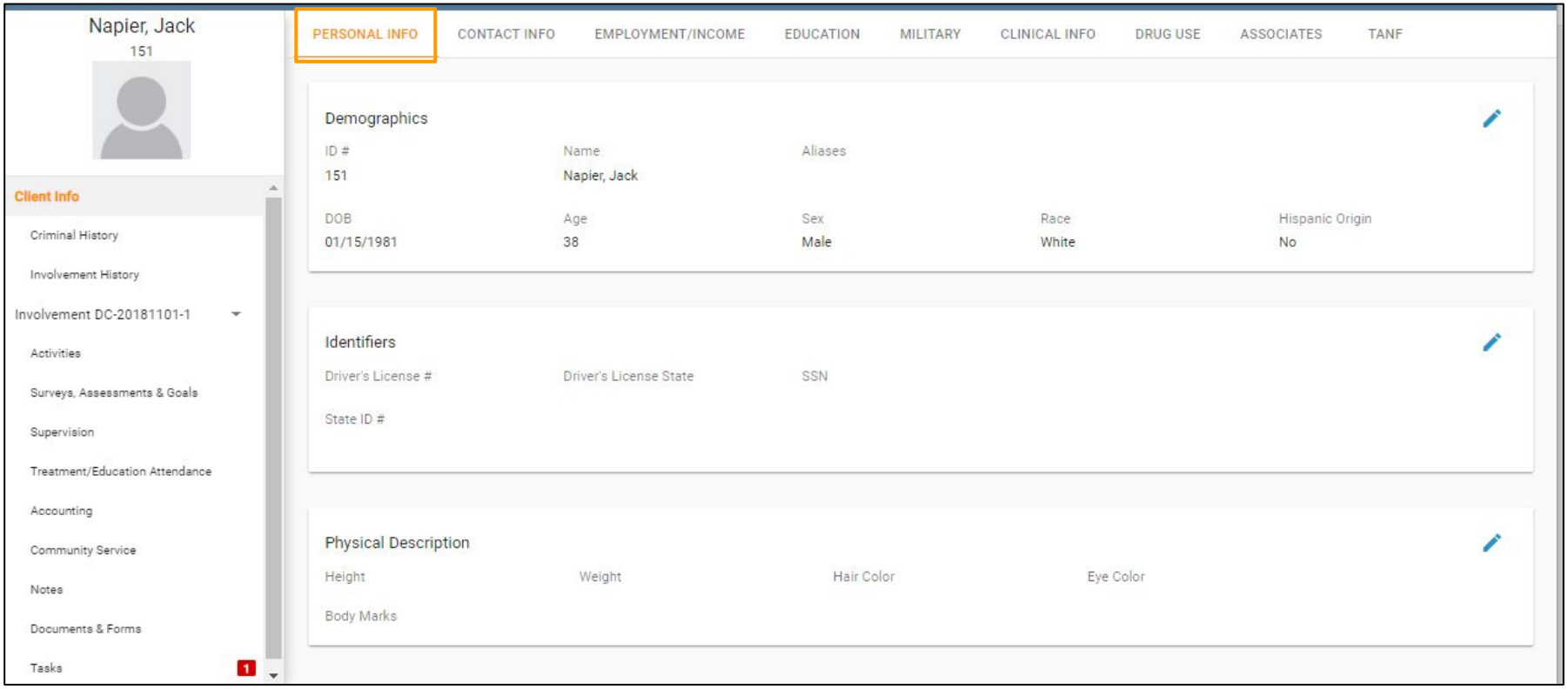
Back to Topics

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.



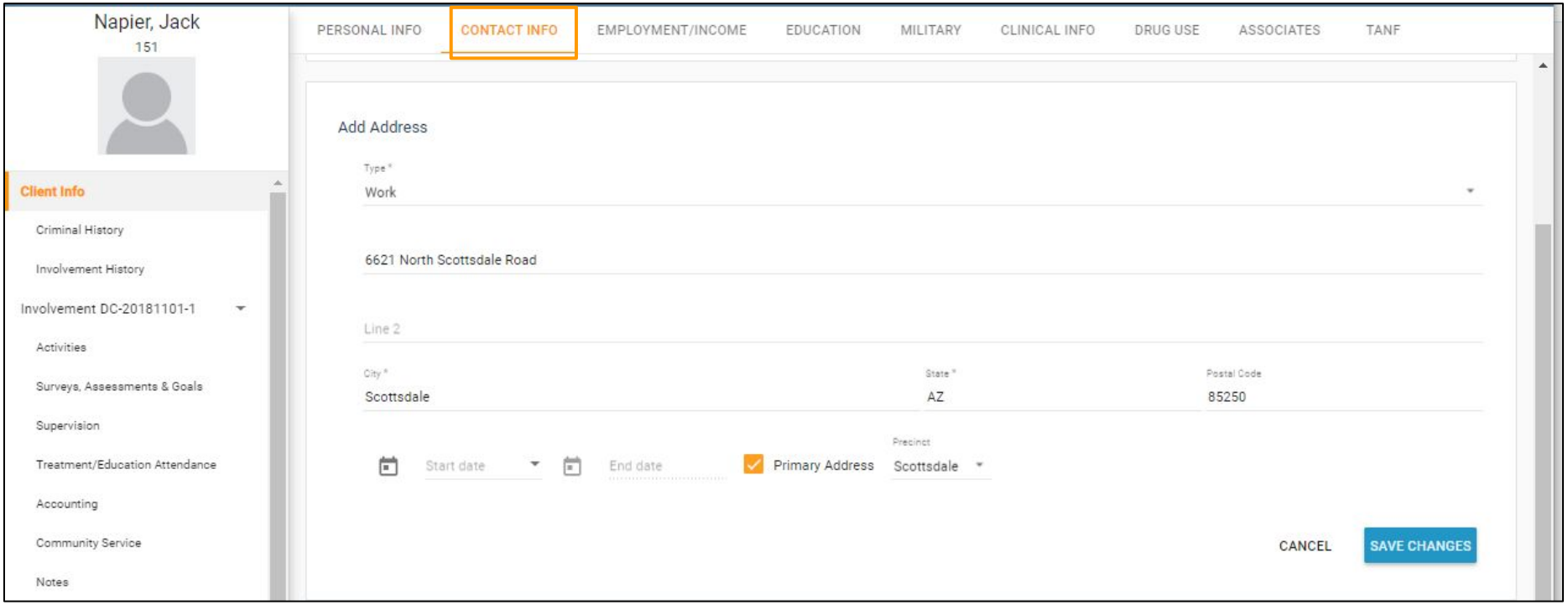
Client Info - Personal Info

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.



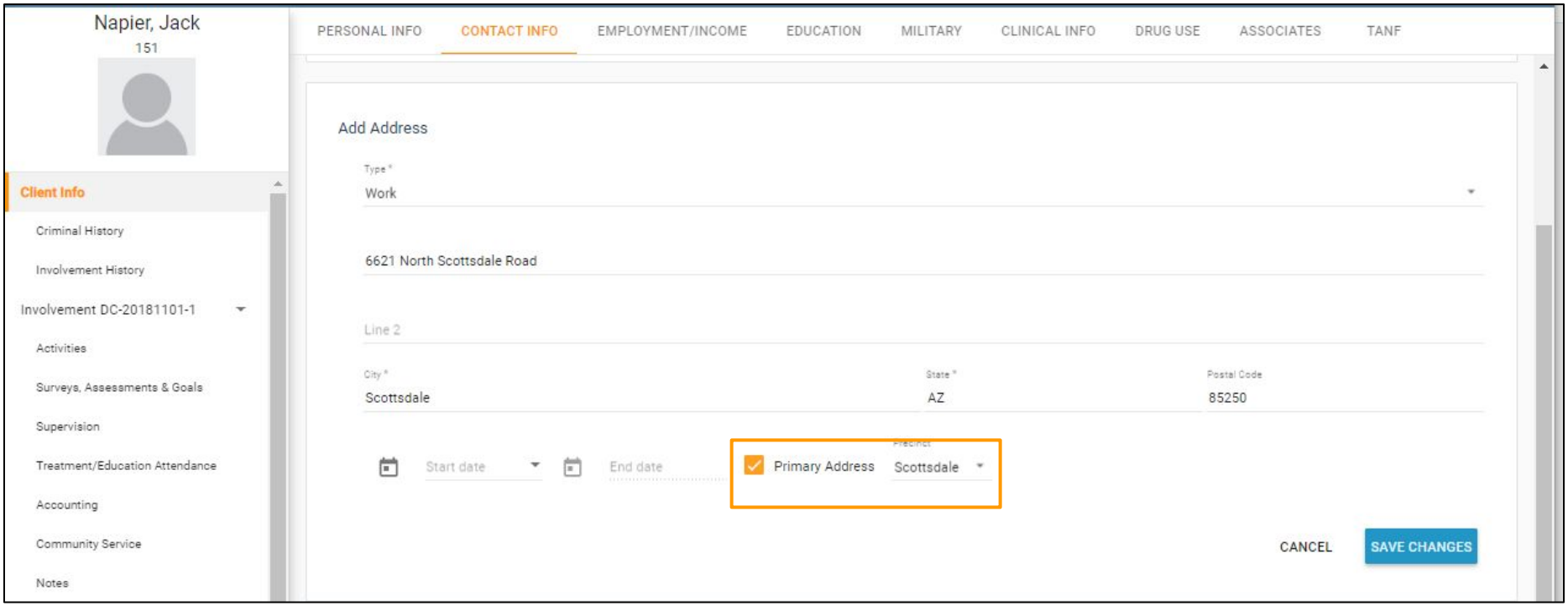
Client Info - Contact Info

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.



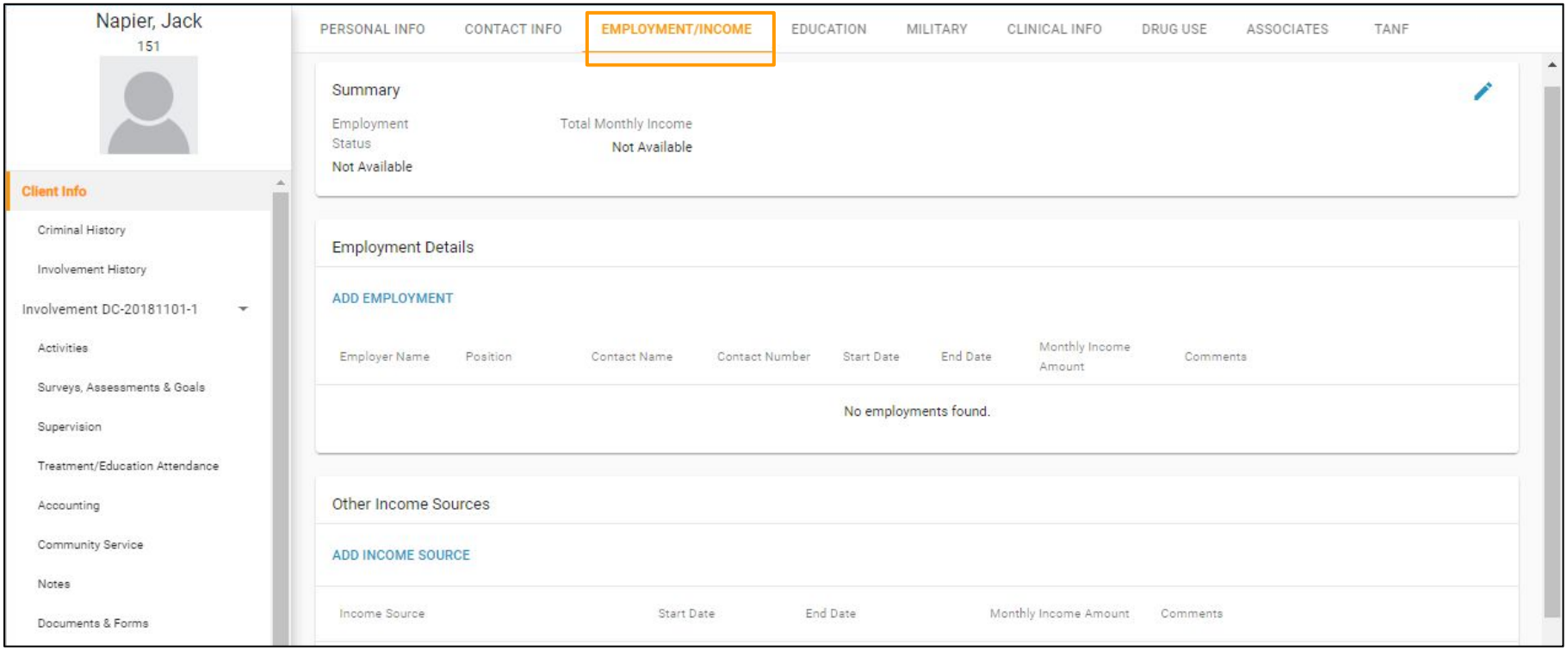
Client Info - Contact Info

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.



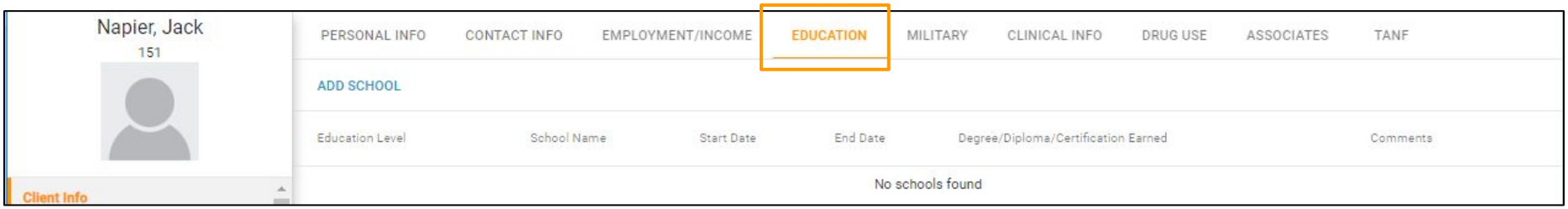
Client Info - Employment/Income

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.



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.



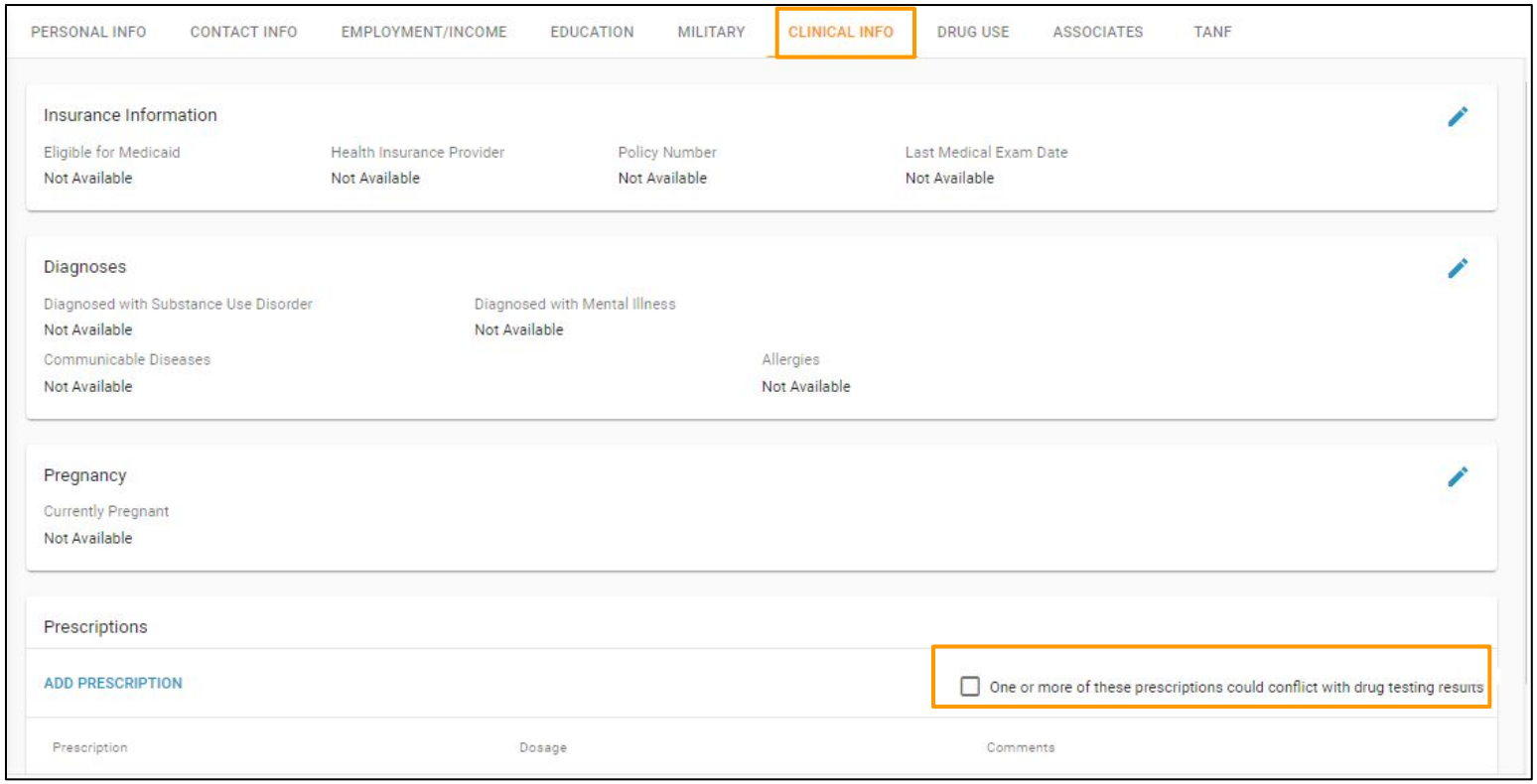
Client Info - Military

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

Back to Topics

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.



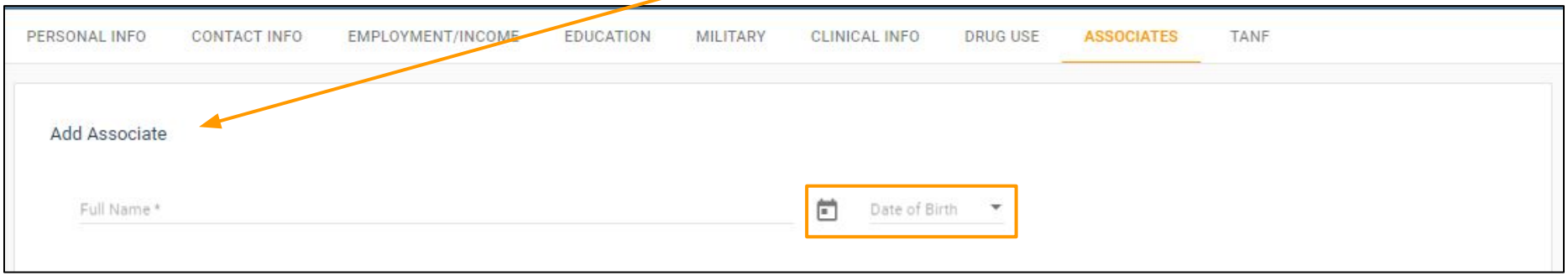
Client Info - Drug Use

Back to Topics

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.

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.



Client Info - TANF

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

Topic 13: Criminal History

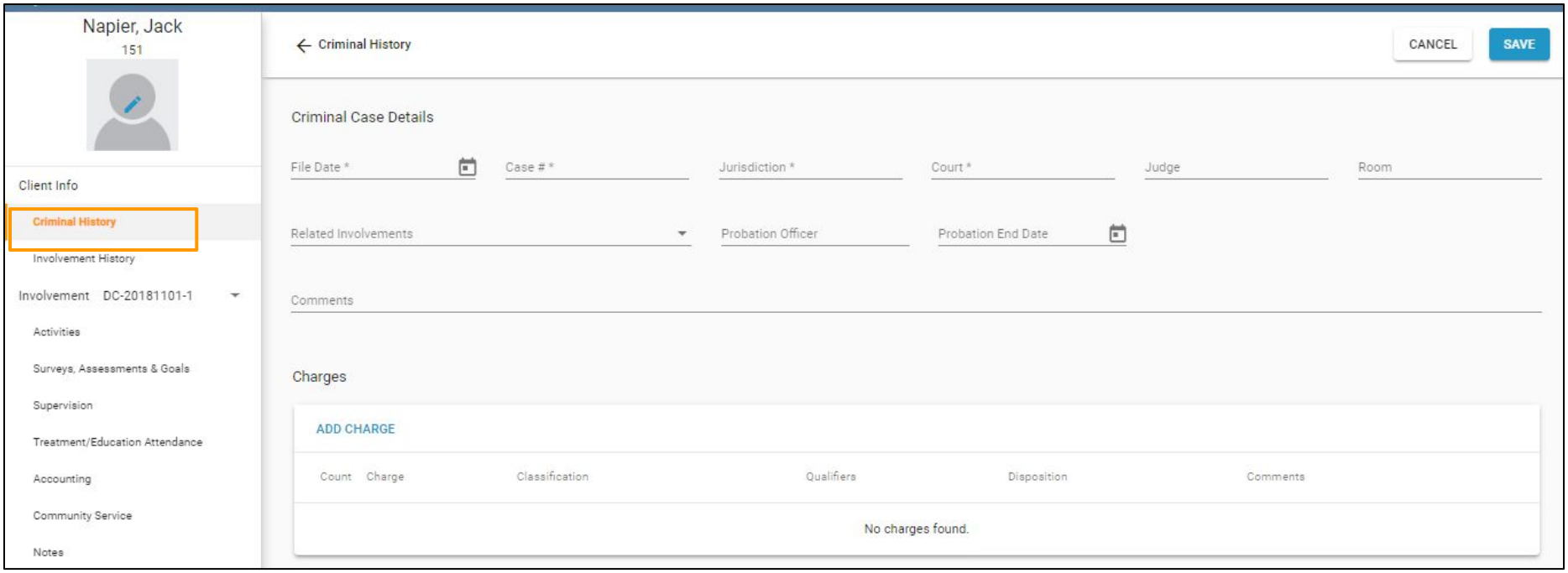
Back to Topics

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).



Topic 14: Involvement History

Back to Topics

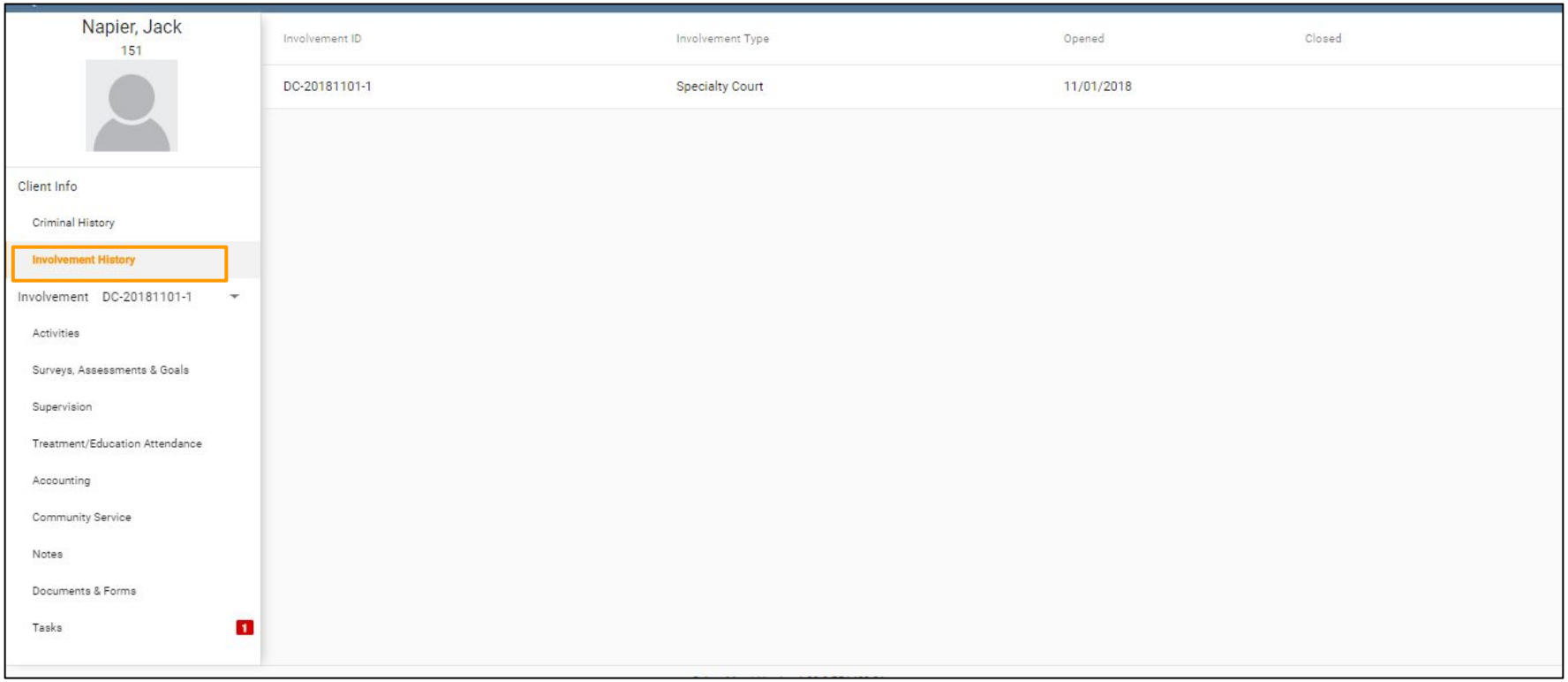
Subtopics:

1. Viewing Details

Client's Profile - Involvement History

Back to Topics

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



Topic 15: Involvement Overview

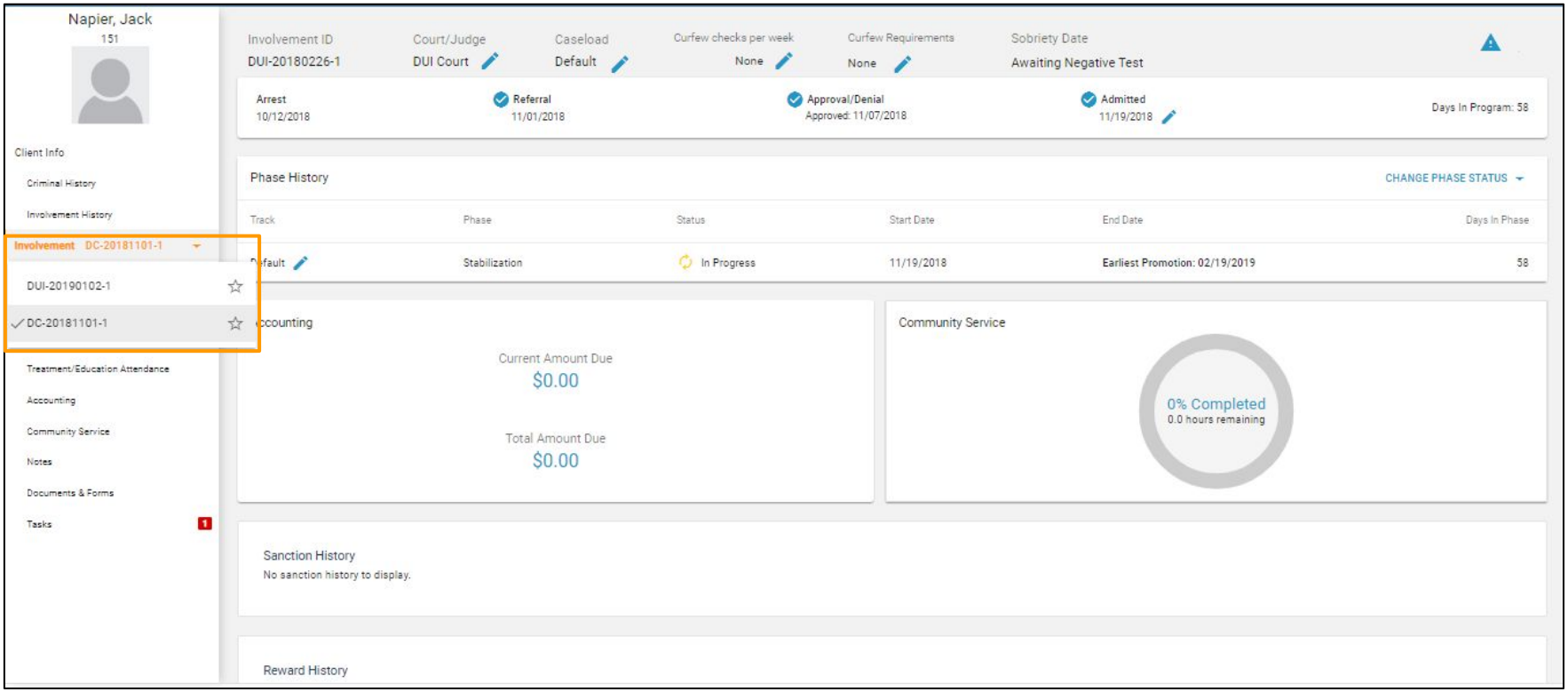
Back to Topics

Subtopics:

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

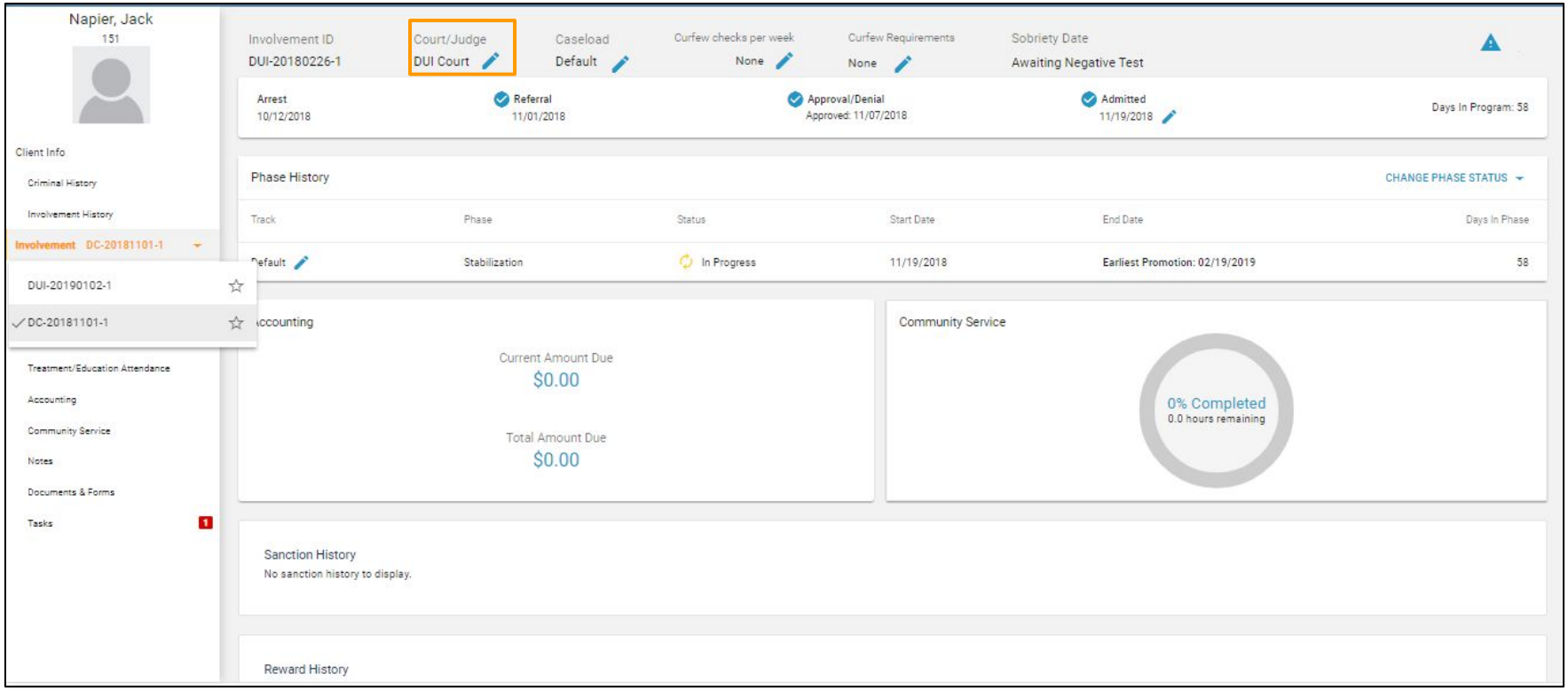
Involvement Overview - Multiple Involvements

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.



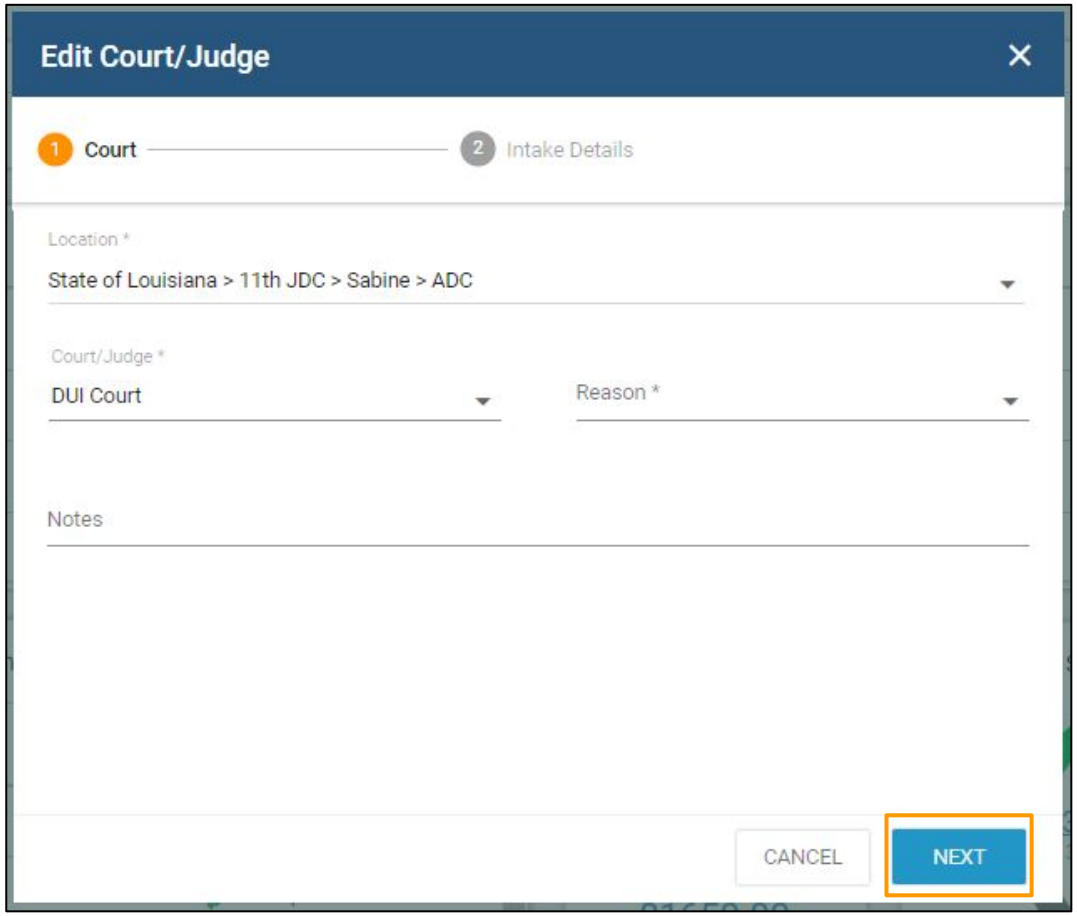
Involvement Overview - Transfer Courts

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.***



Involvement Overview - Transfer Courts

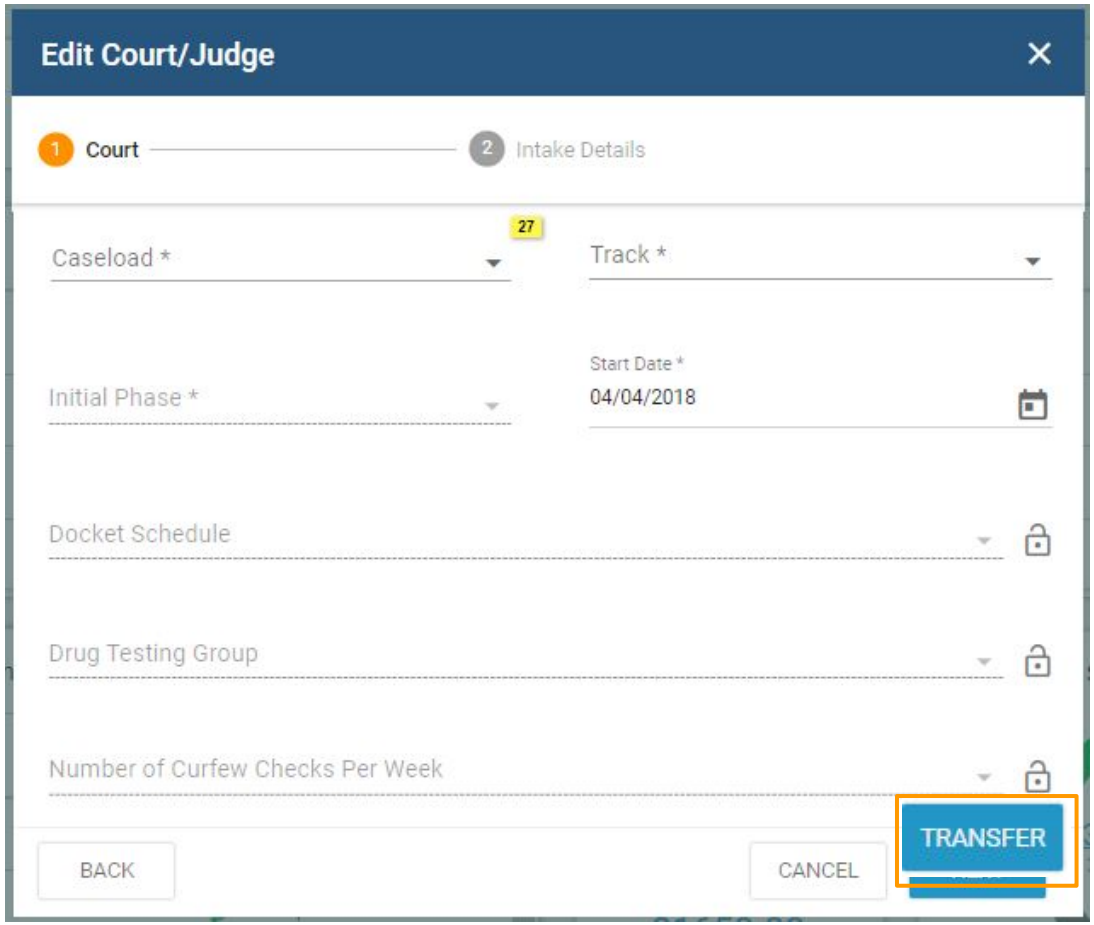
Once a User clicks on the pen icon, they will be presented with a two-step process to complete the transfer. The first step allows the User to select the Location, Court, Reason for transfer and enter a comment.



Involvement Overview - Transfer Courts

Back to Topics

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.

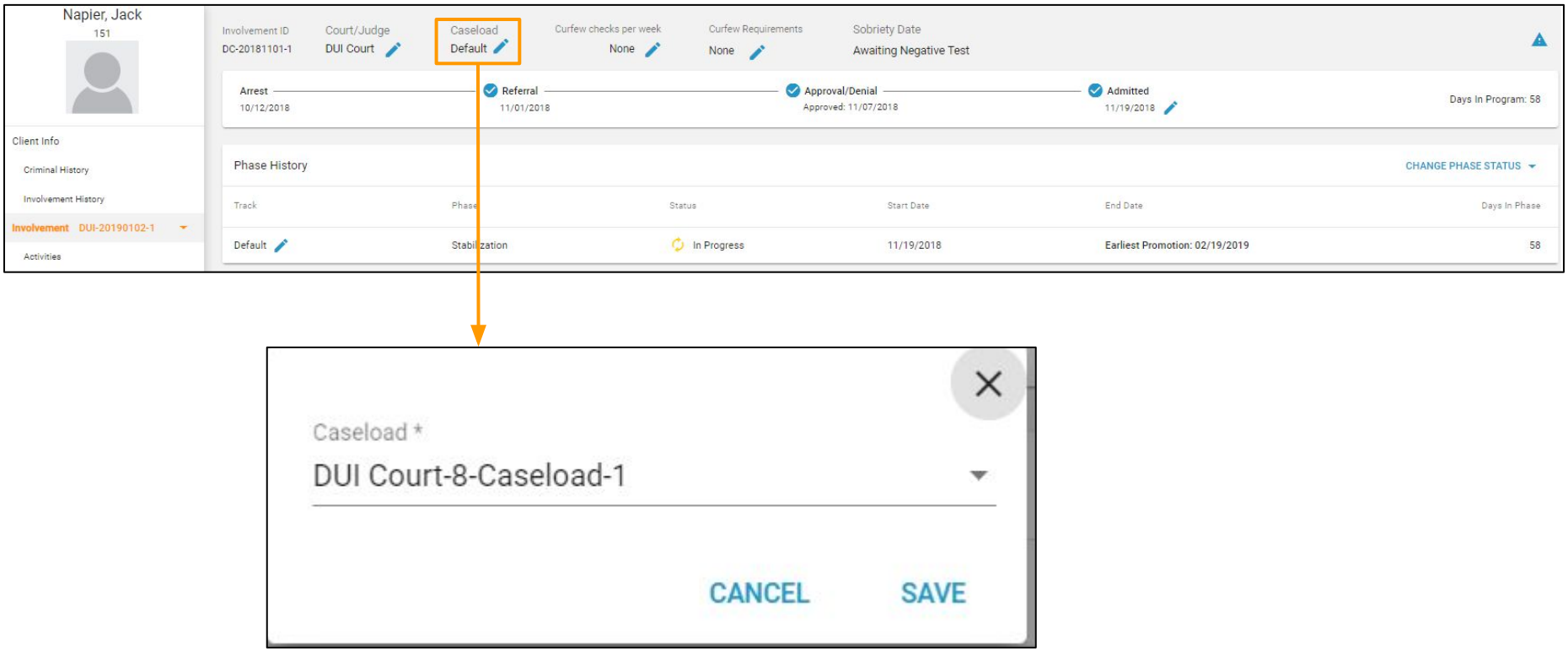


Involvement Overview - Transfer Courts

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.

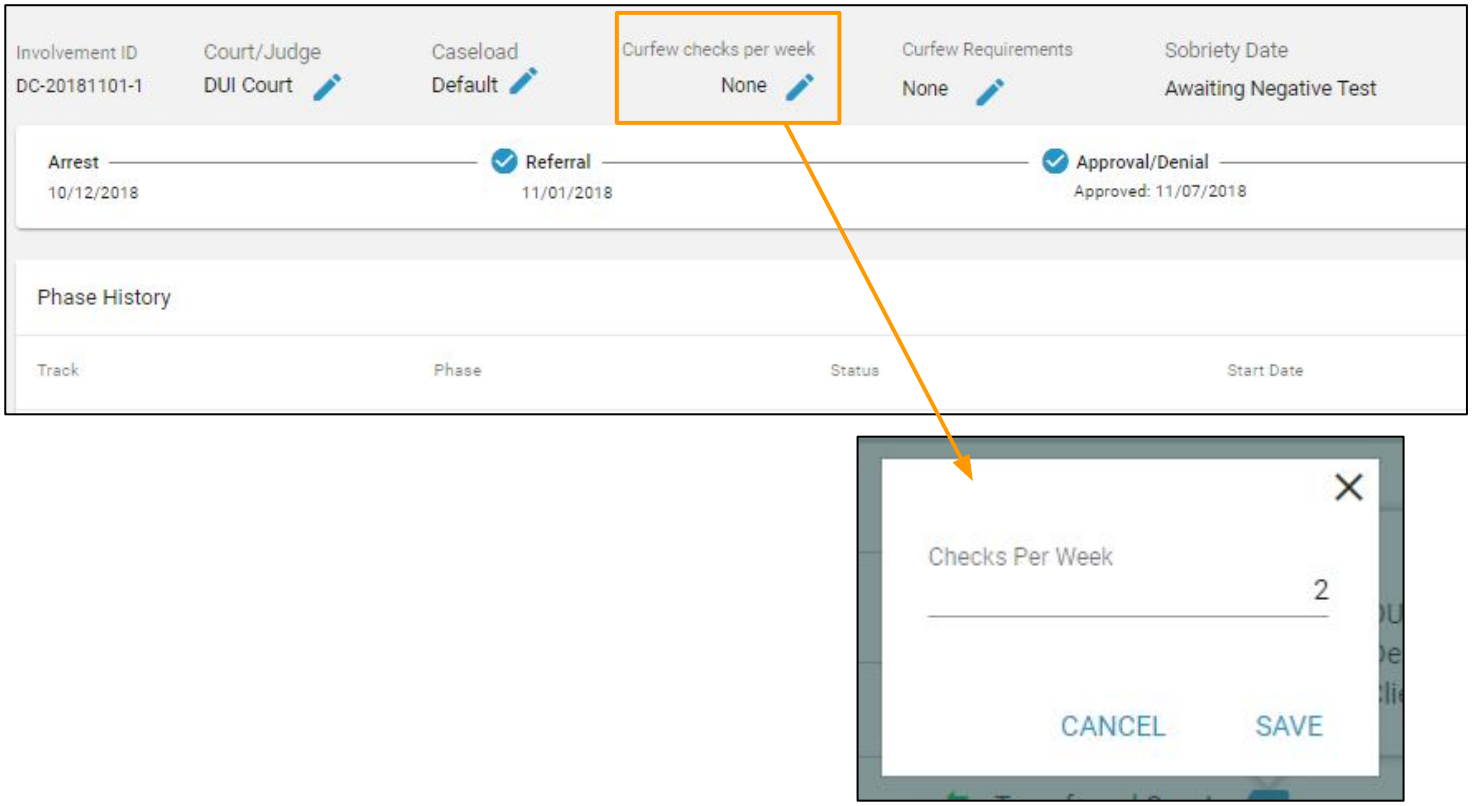
Involvement Overview - Changing Caseloads

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.



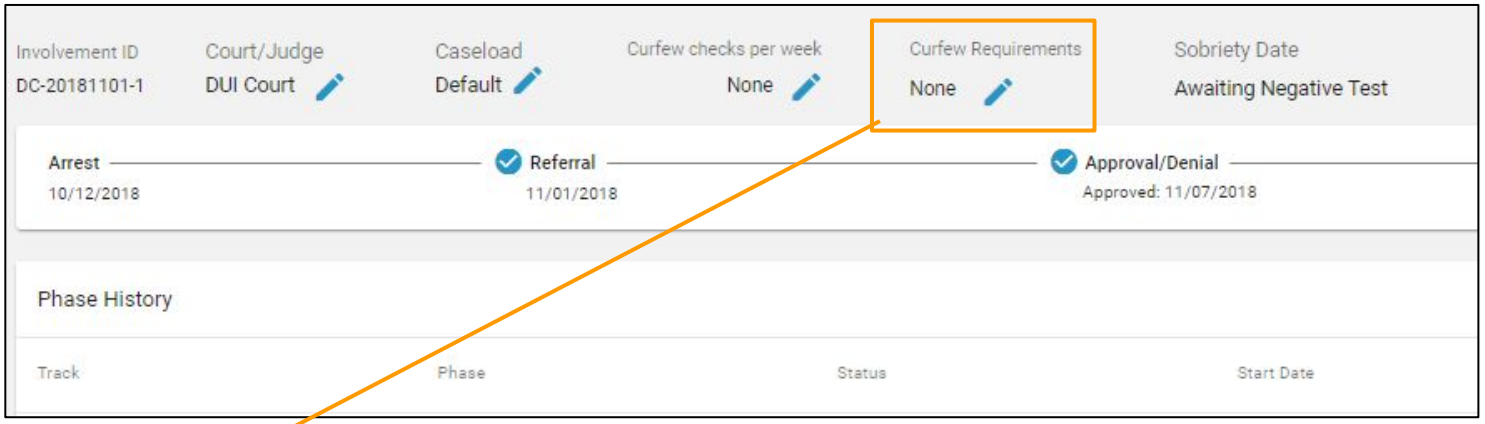
Involvement Overview - Curfew Checks

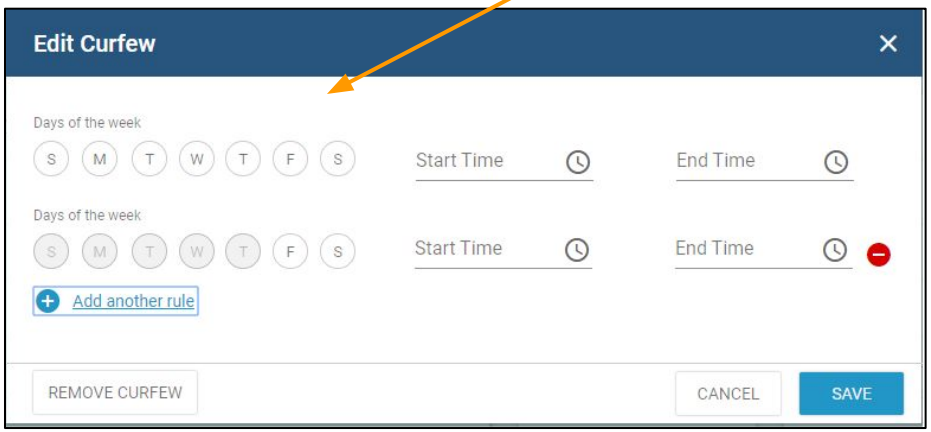
Users have the ability to indicate a Client's Curfew requirements and indicate the number of Curfew Checks per week for the Client. System Admins can also indicate the number of Curfew Checks per week, by Phase. To add the number of Curfew Checks per week, Users will click on the pen icon.



Involvement Overview - Curfew Checks

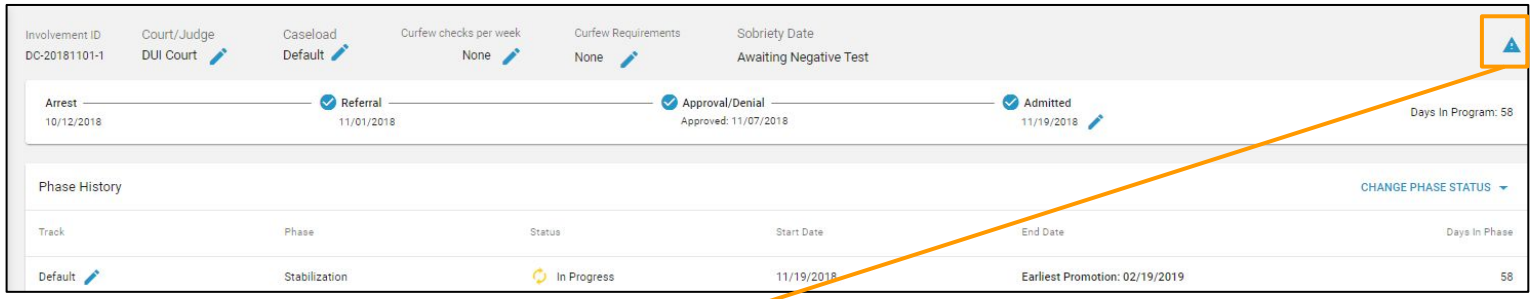
Users have the ability to set the Client's Curfew requirements by clicking on the pen icon. The User can set as many rules as necessary. For example a weekday rule and a weekend rule.

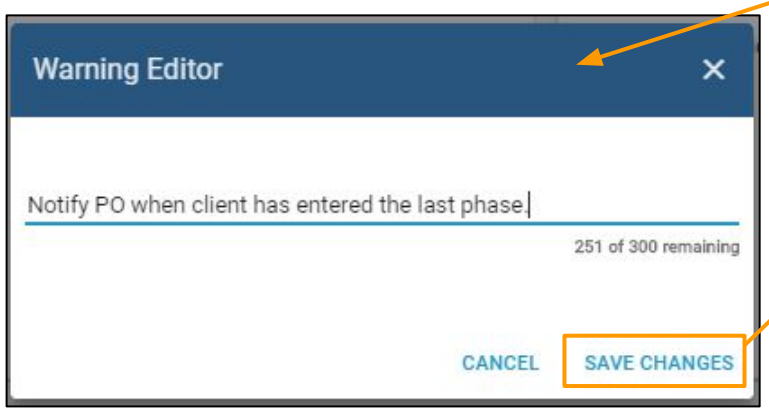




Involvement Overview - Warning

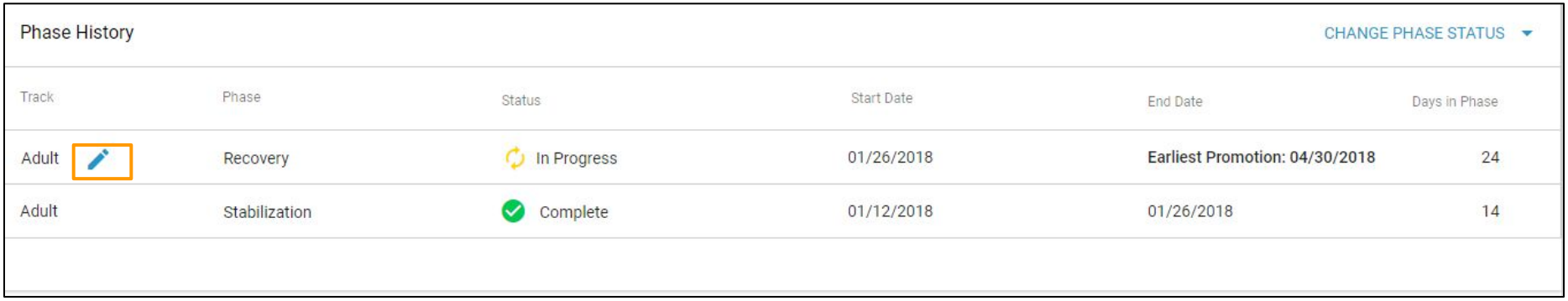
Users have the ability to set Warnings on each Involvement. Once a Warning message has been set, the Warning will be visible on the top of the Client's profile at all times.





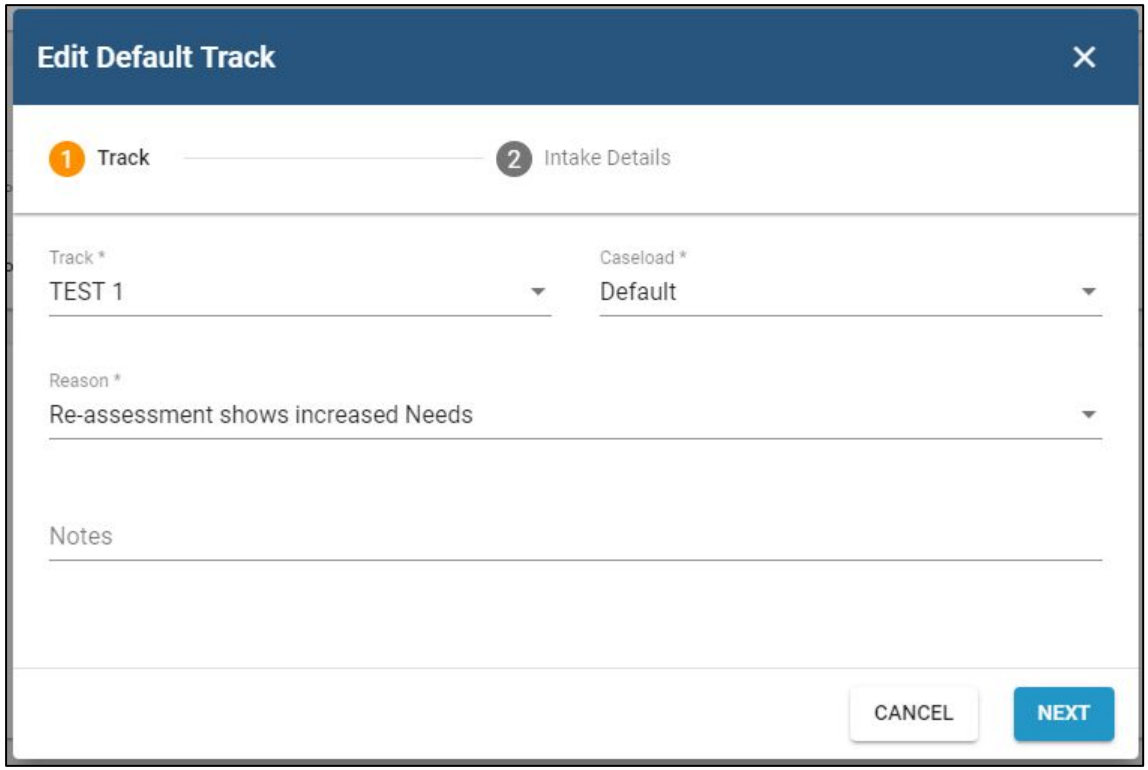
Involvement Overview - Transfer Tracks

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.



Involvement Overview - Transfer Tracks

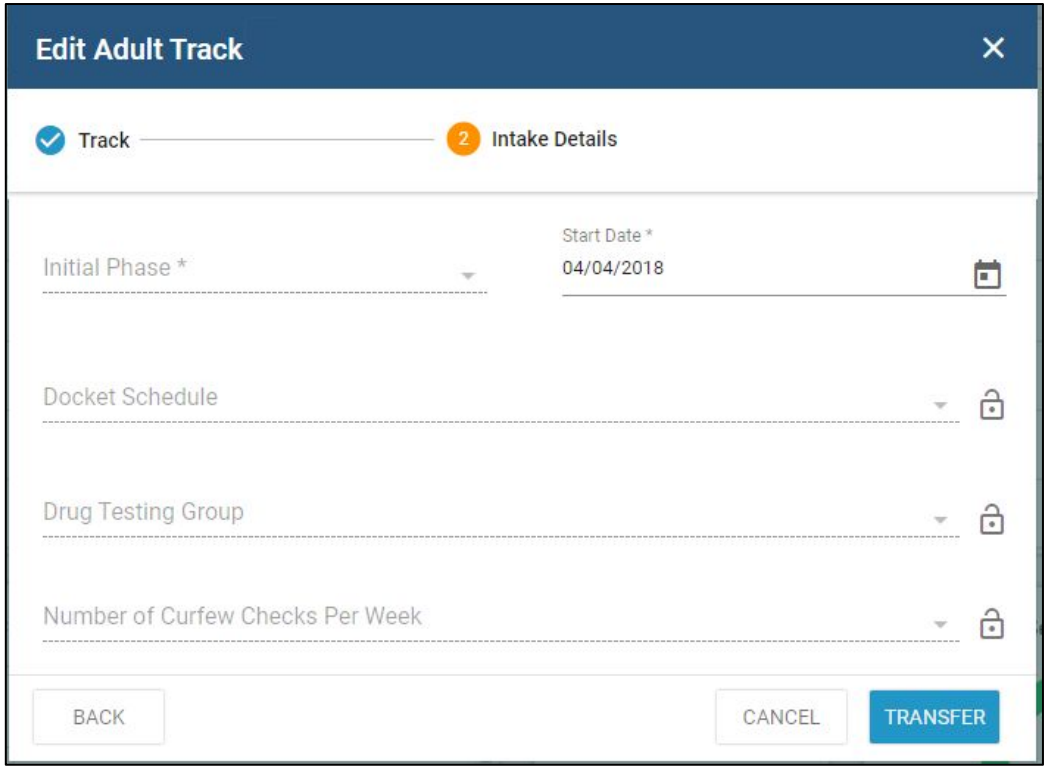
The first step allows the User to select the new Tack, Caseload, reason, and the ability to enter additional notes.



Involvement Overview - Transfer Tracks

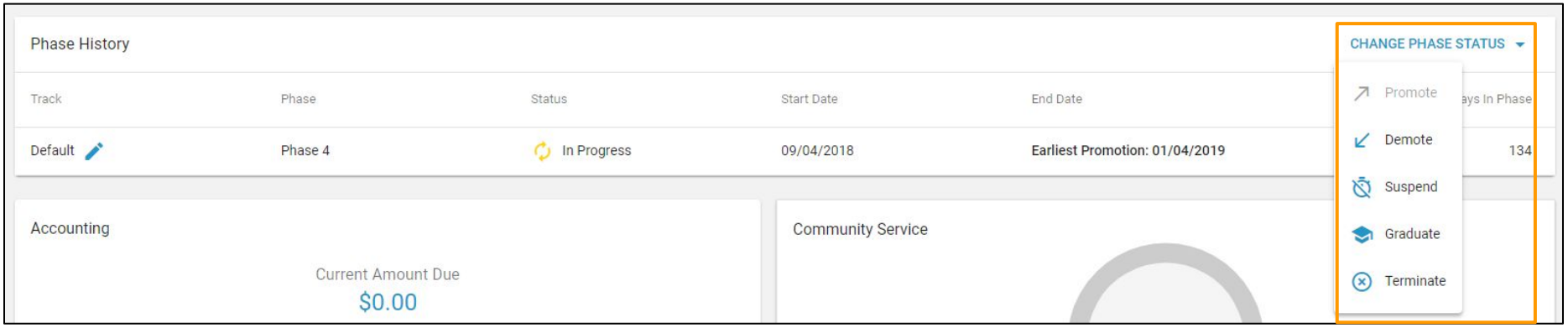
Back to Topics

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



Involvement Overview - Change Phase Status

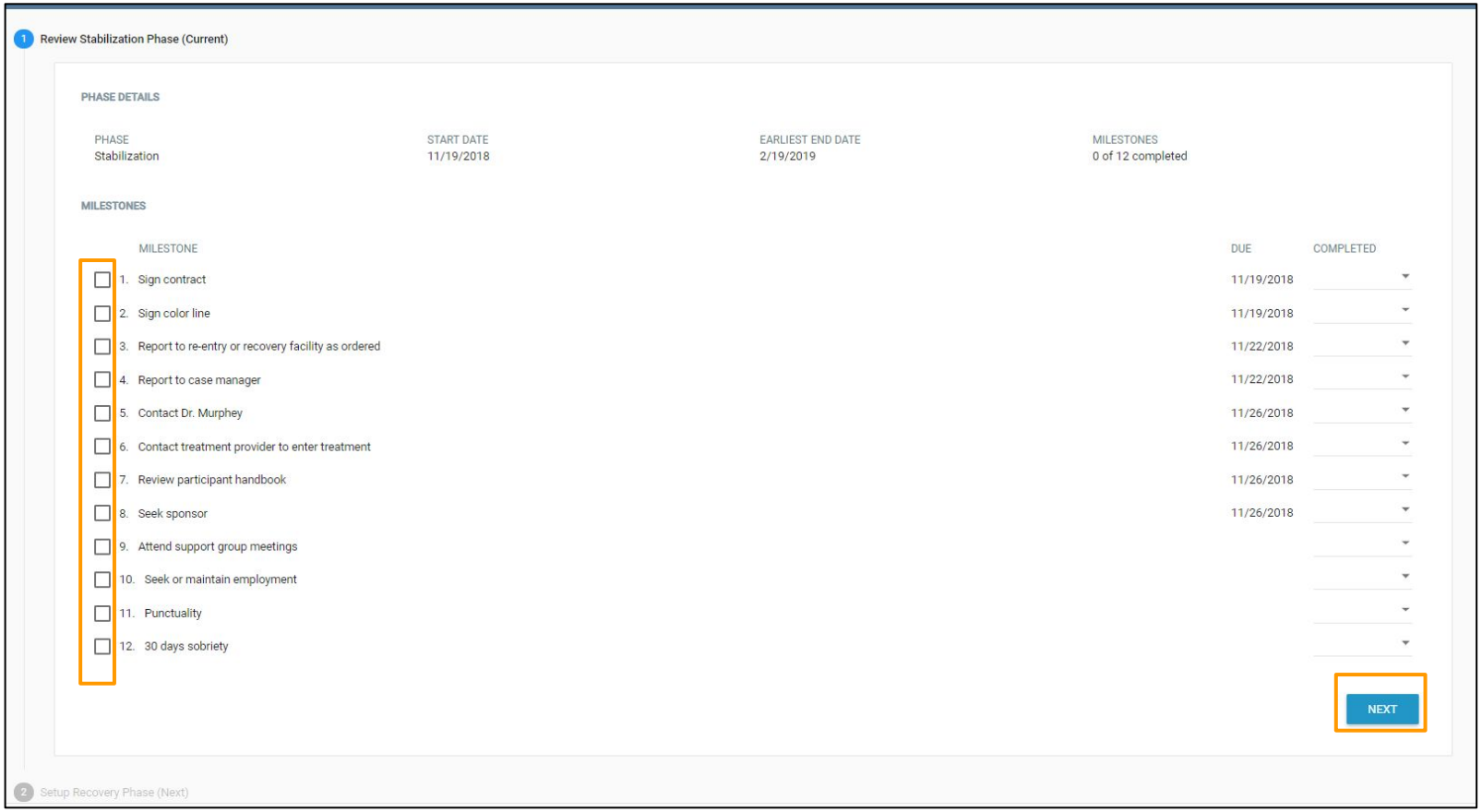
Users have the ability to change a Client's Phase from the Involvement overview screen. Users would click on the *Change Phase Status* hyperlink in the Phase History section. Based on which Phase the Client is in, Users will have the ability to Promote, Demote, Suspend, Graduate, or Terminate the involvement.



Change Phase - Promote Client

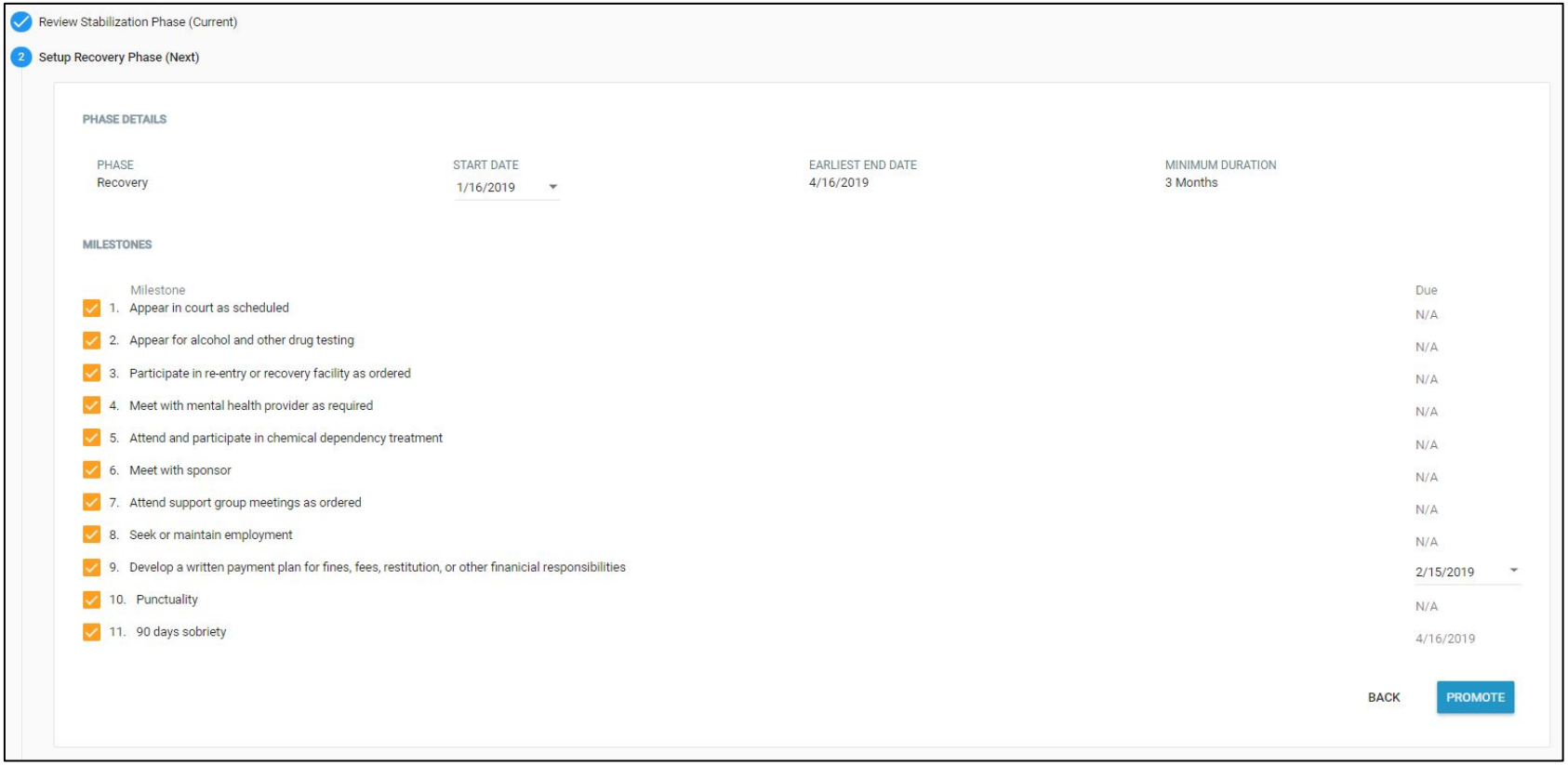
Back to Topics

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.



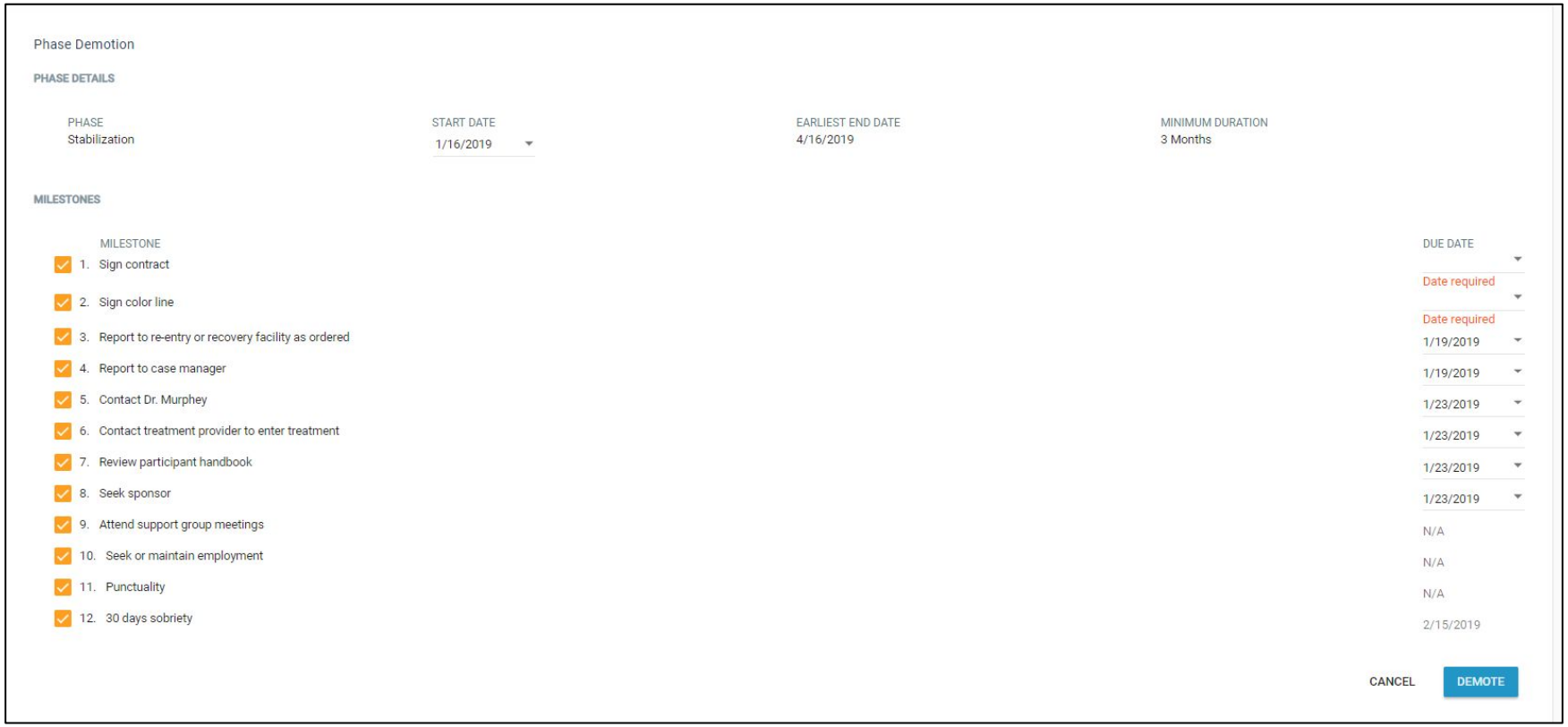
Change Phase - Promote Client

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.



Change Phase - Demote Client

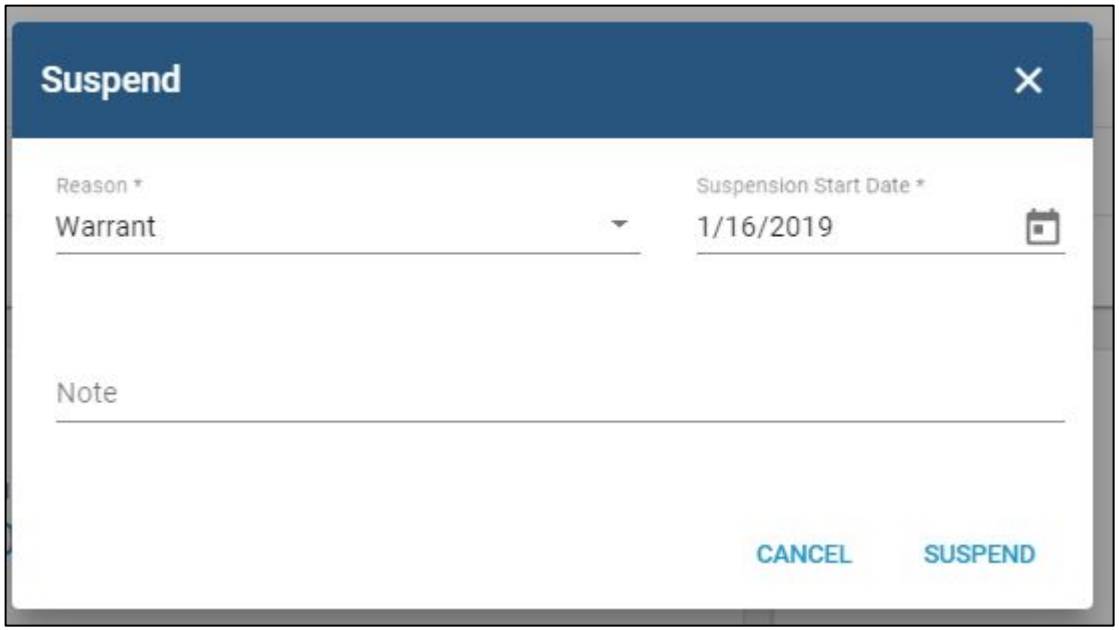
In the event that a Client is demoted to the previous phase, Users have the ability to demote the Client from the Change Phase Status hyperlink. The User is a presented with the previous Phase milestones to select and will click on the Demote button. **Note: AutoMon will be redesigning the phase requirement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



Back to Topics

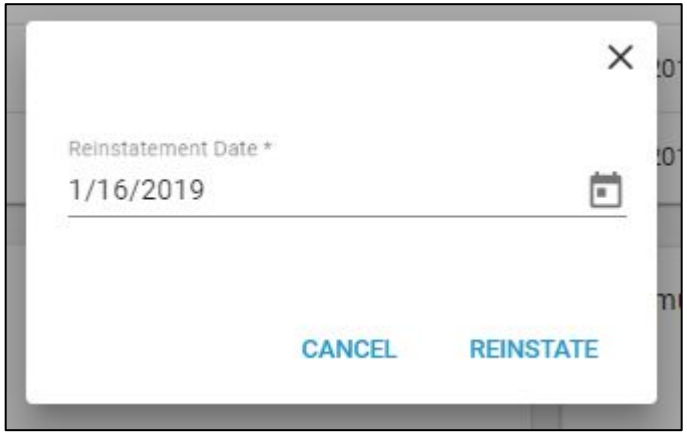
Change Phase - Suspend Involvement

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.



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.



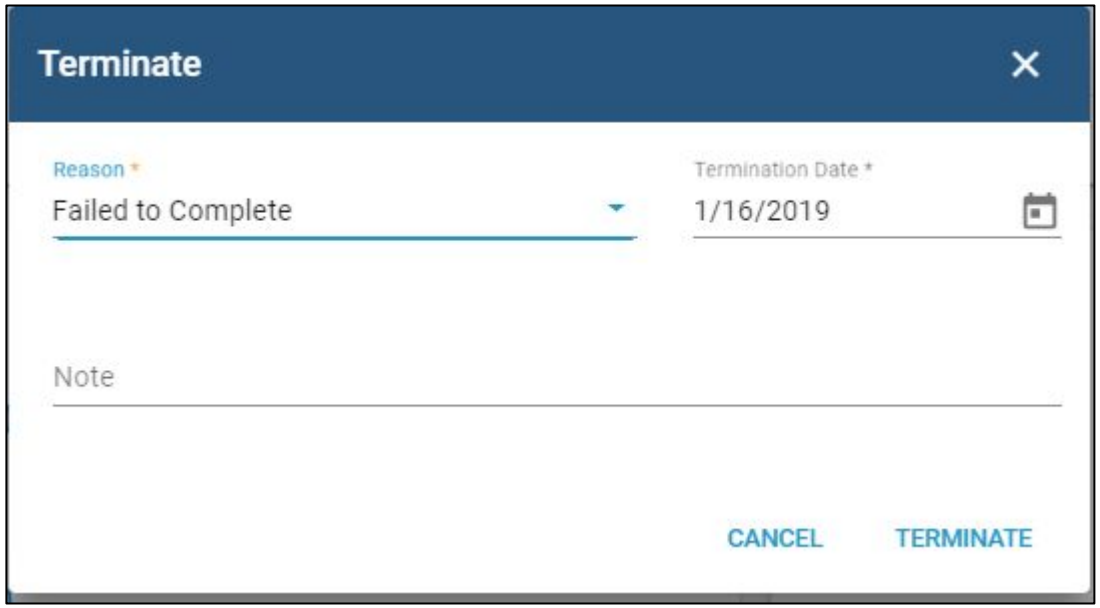
Back to Topics

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.

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.



Change Phase - Phase Status Change

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

Phase History

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

Topic 16: New Activities

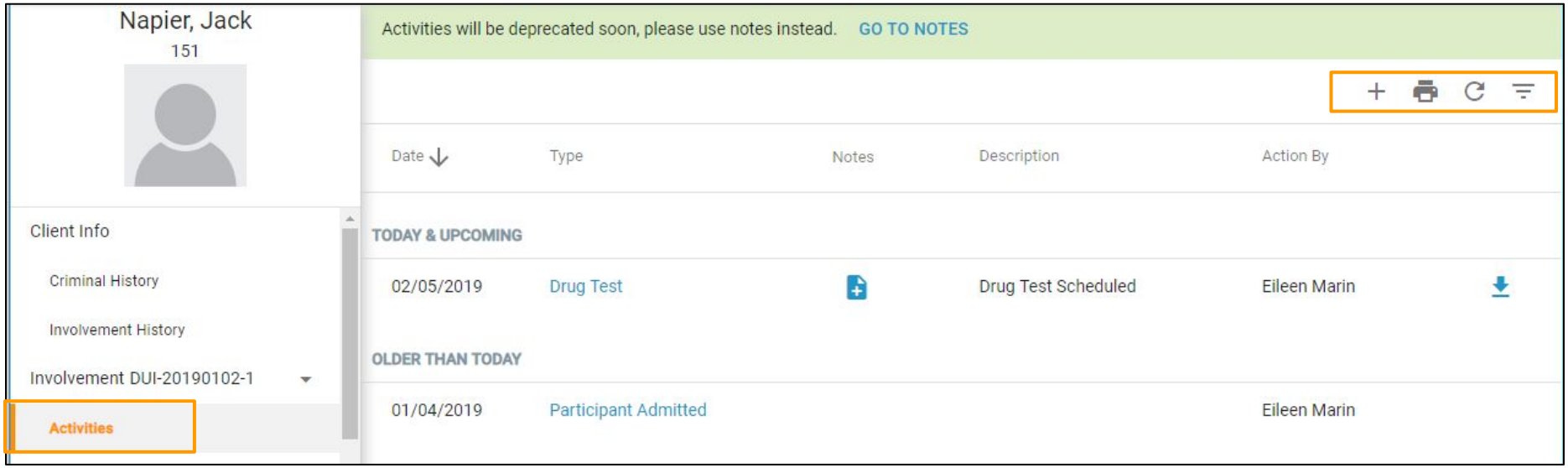
Back to Topics

Subtopics:

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

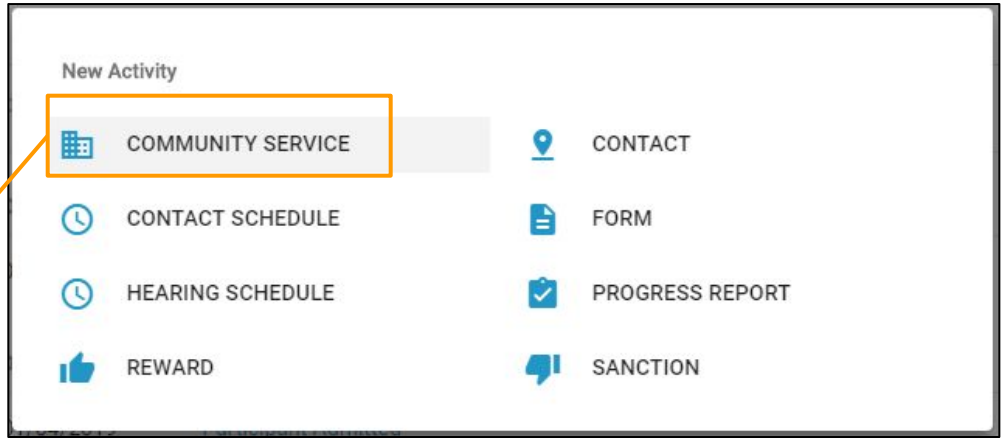
New Activities - Overview

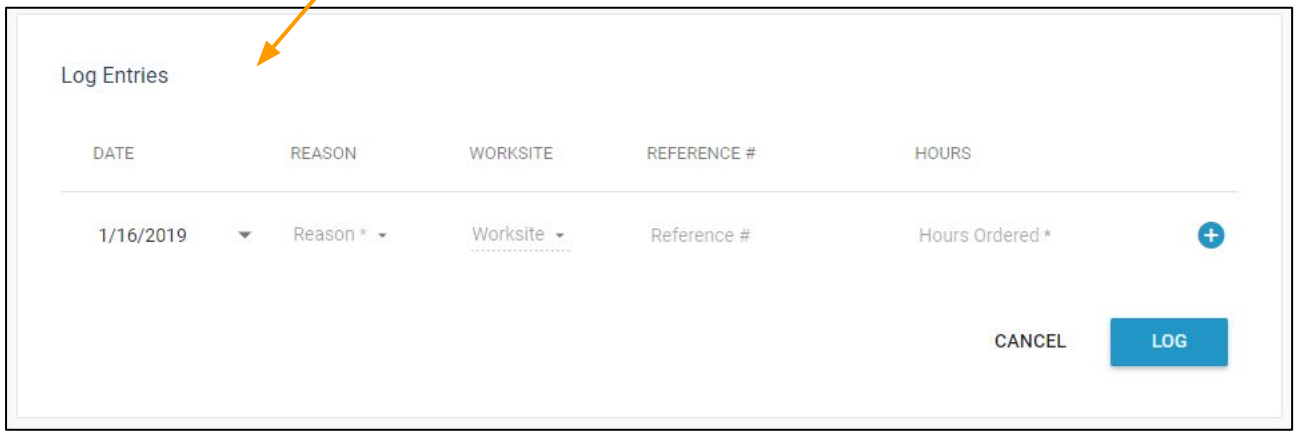
The Activities section currently has two purposes. Users are able to add specific activities by clicking on the + (plus) icon. The Activities listing also records all scheduled, missed, and completed activities. This listing will turn into the audit log in a future release. Users have the ability to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



New Activities - Community Service

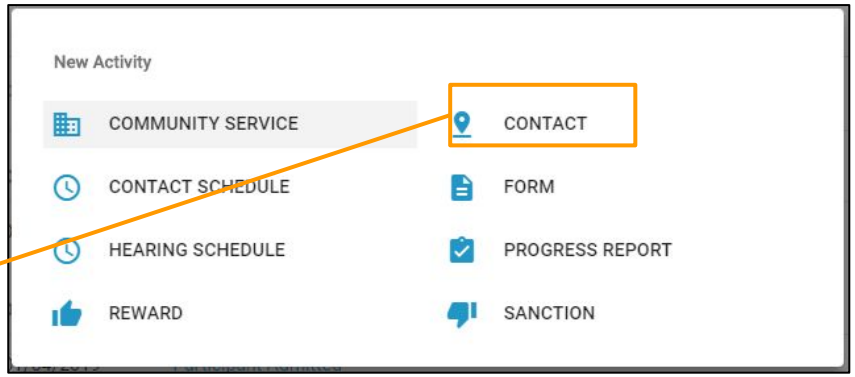
When a User clicks on the Community Service activity, they will be redirected to the Community Service Log Entries screen. This allows Users to enter Community Service hours completed by the Client.





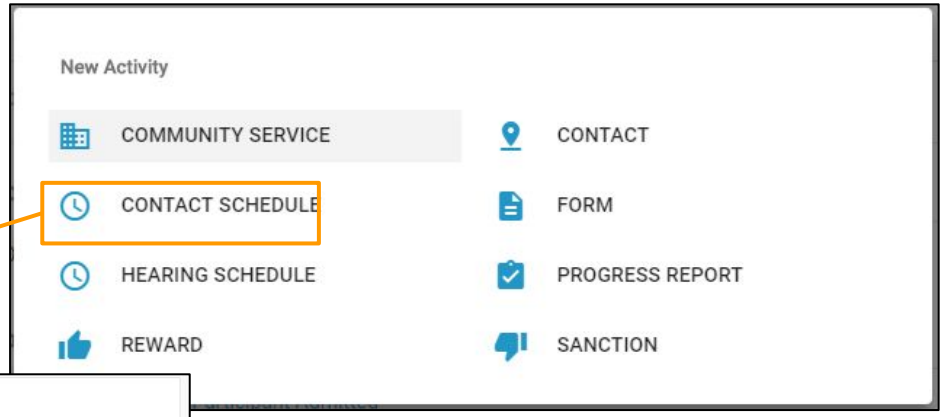
New Activities - Contact

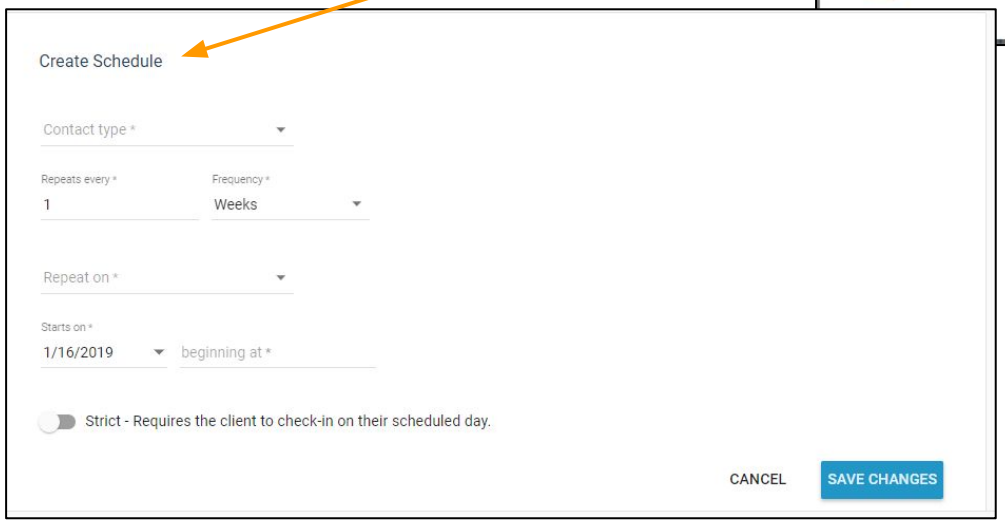
When a User clicks on the Contact activity, they can record a completed Contact. Users are required to select a Contact type, Contact date, and start time. Users also have the ability to add additional notes.



New Activities - Contact Schedule

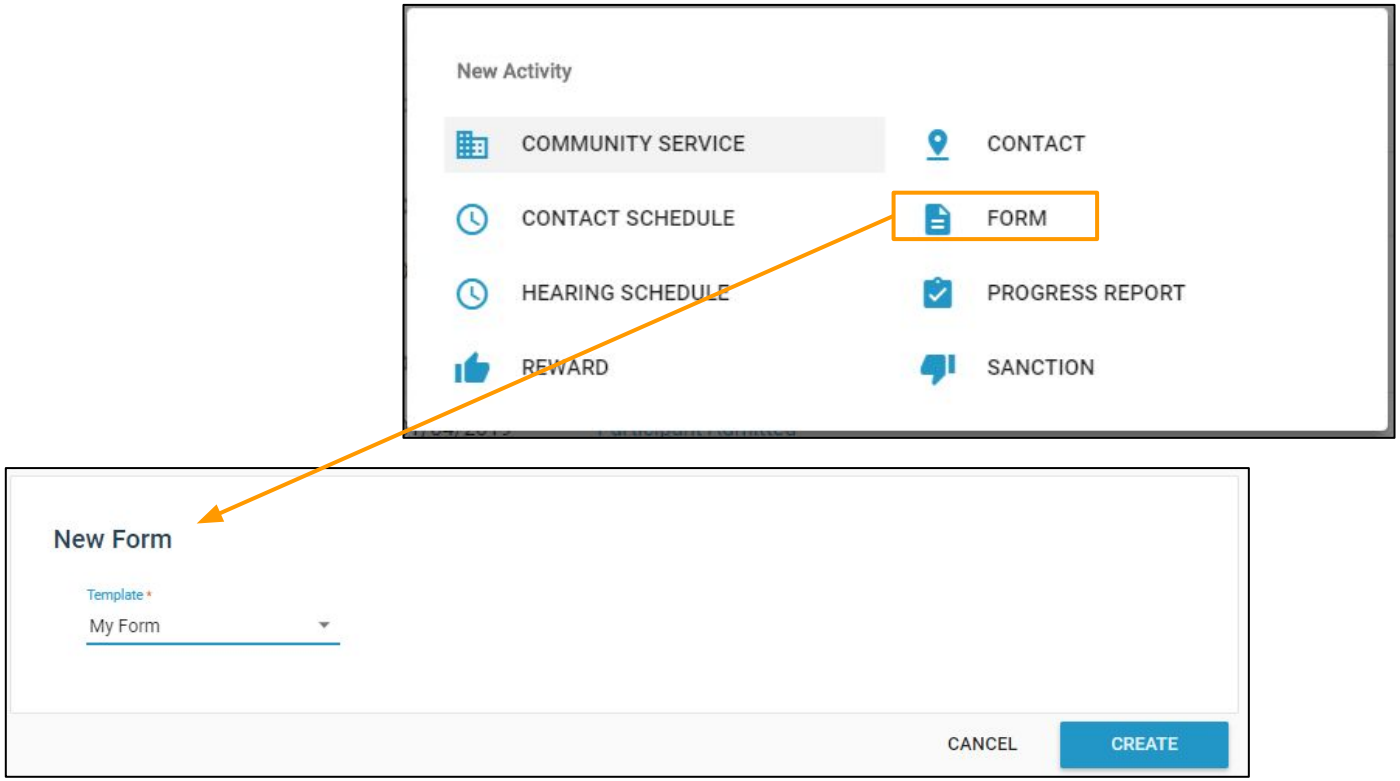
When a User clicks on the Contact Schedule activity, they can set up a recurring Contact reporting schedule. Users are required to select a Contact type, enter the frequency, start date, and can indicate if the reporting requirement is strict (requires the Client check in on the scheduled date) or flexible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





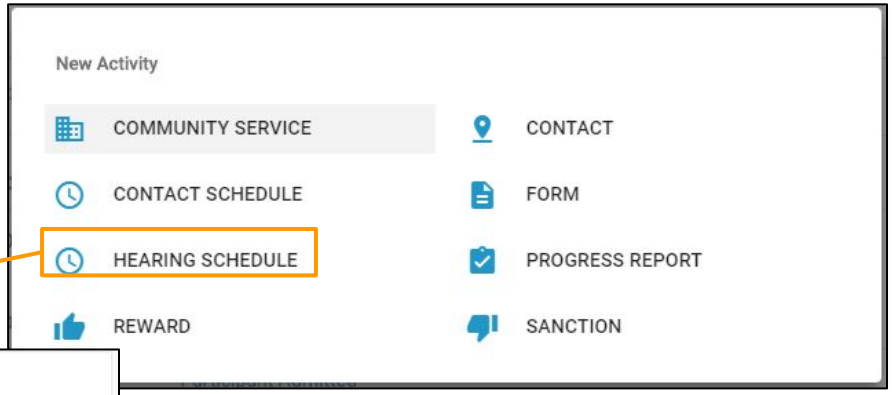
New Activities - Form

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.



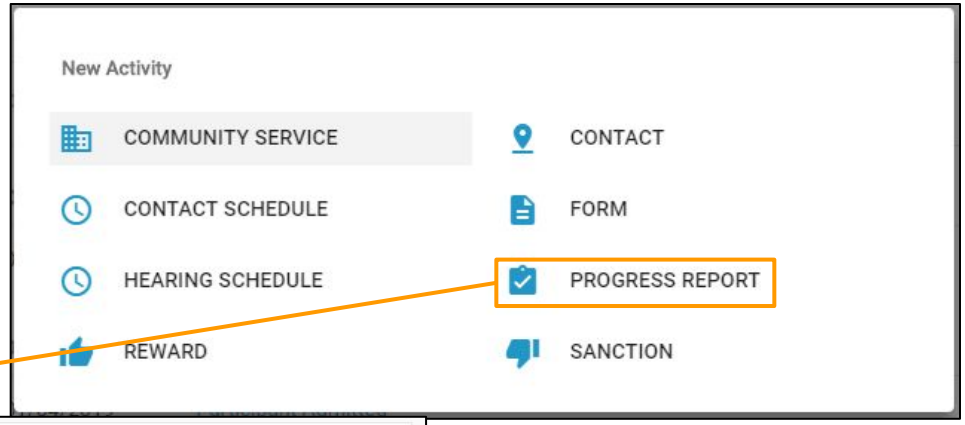
New Activities - Hearing Schedule

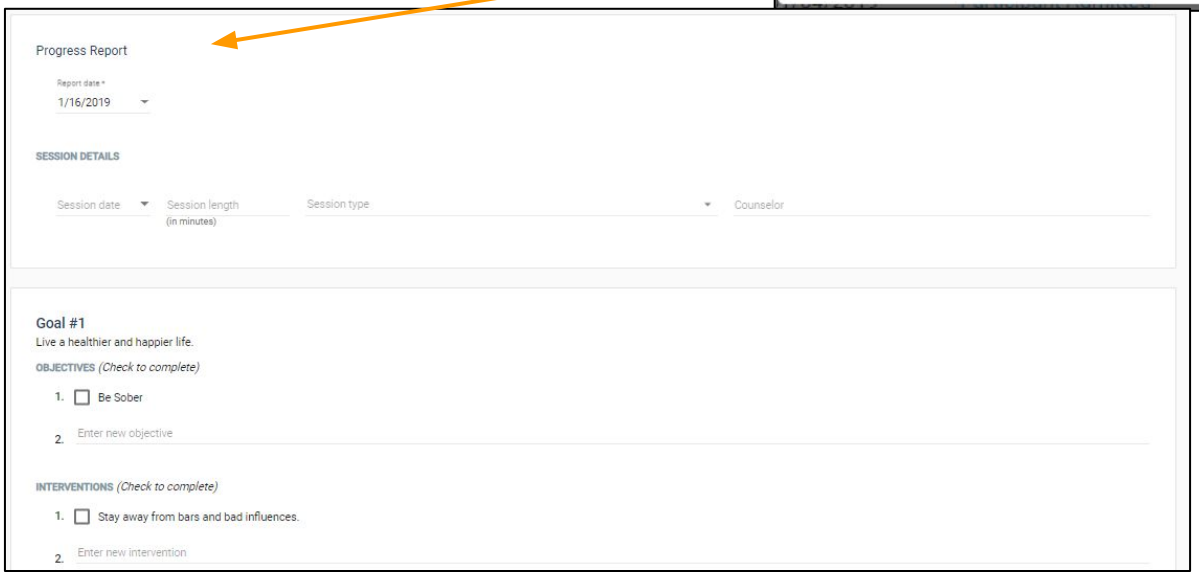
Users have the ability to setup a Hearing schedule for a Client. When a User clicks on the Hearing Schedule activity option, they are redirected to select an existing schedule type or create a custom schedule.



New Activities - Progress Report

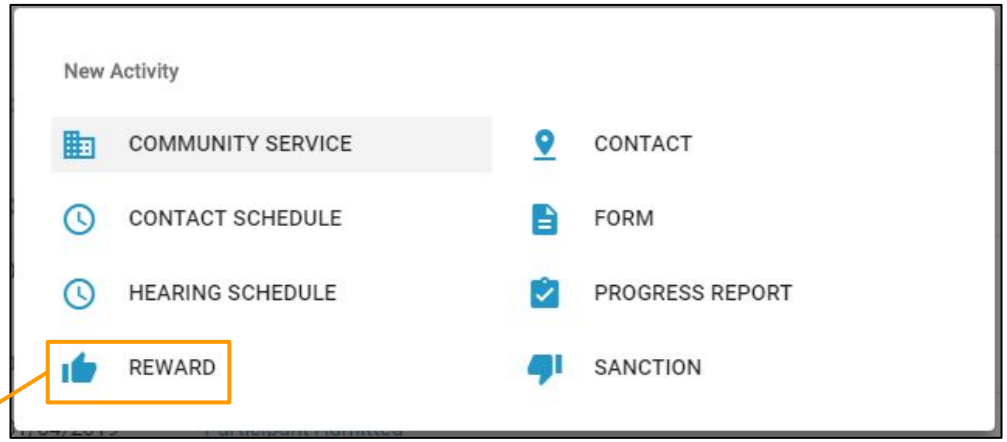
Users have the ability to enter a Progress Report from the new activity option. The Client must have an existing treatment plan with goals in order to complete a progress report.

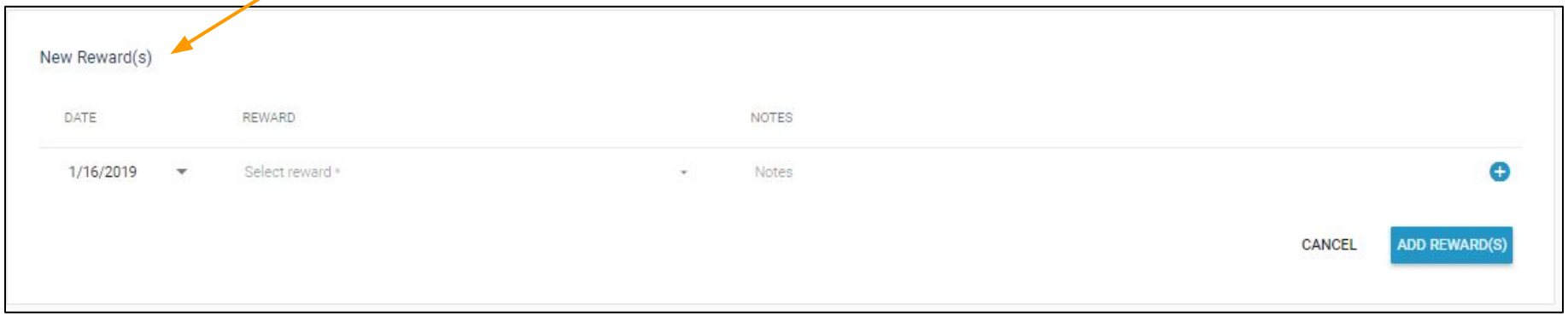




New Activities - Reward

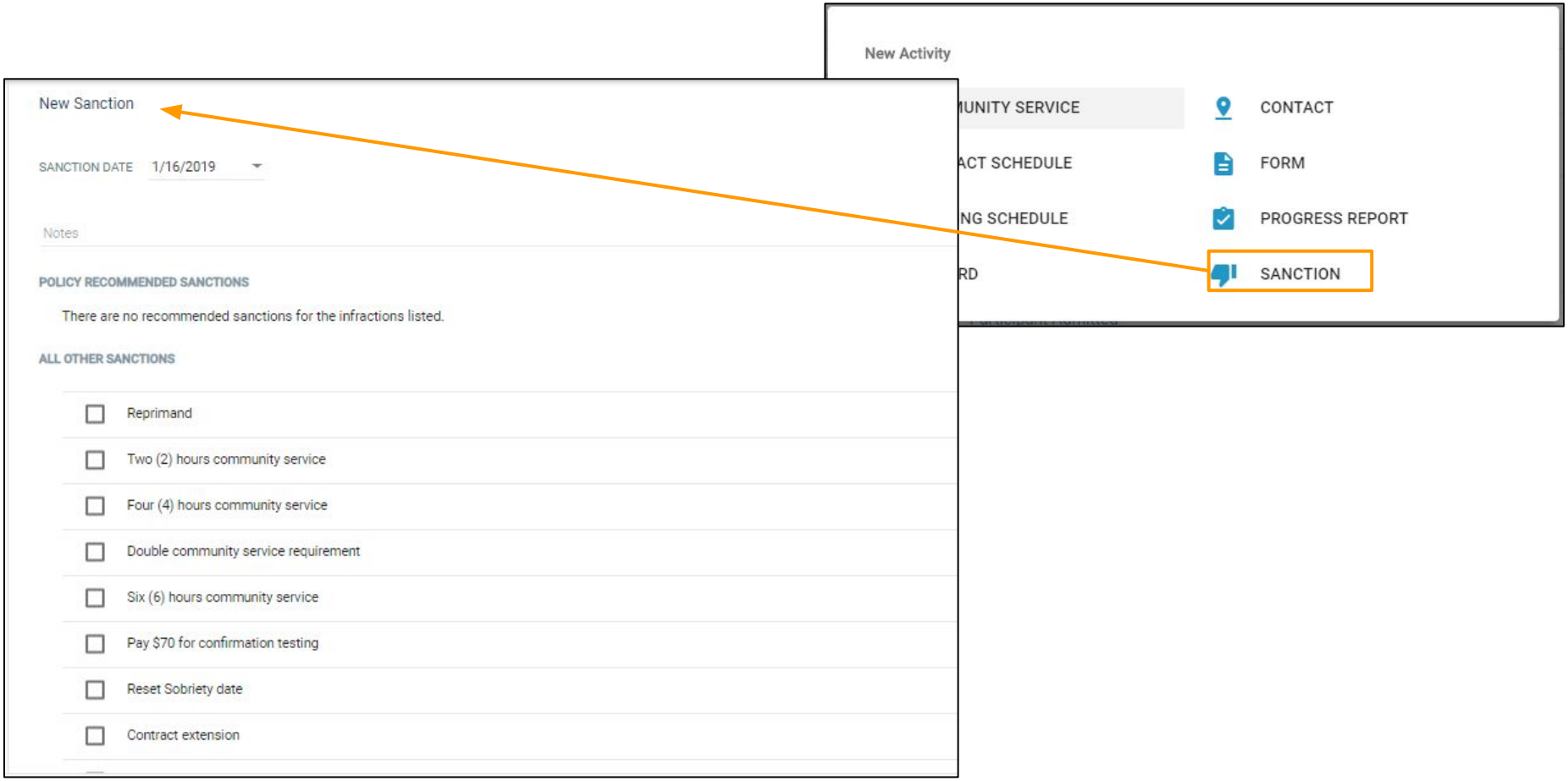
Users are able to add new Rewards from the New Activity option. Once clicked, Users will be redirected to enter a new Reward. Users can also add Rewards during the Hearing review and complete Hearing steps from the main tasks listing.





New 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.



Topic 17: Surveys, Assessments & Goals

Back to Topics

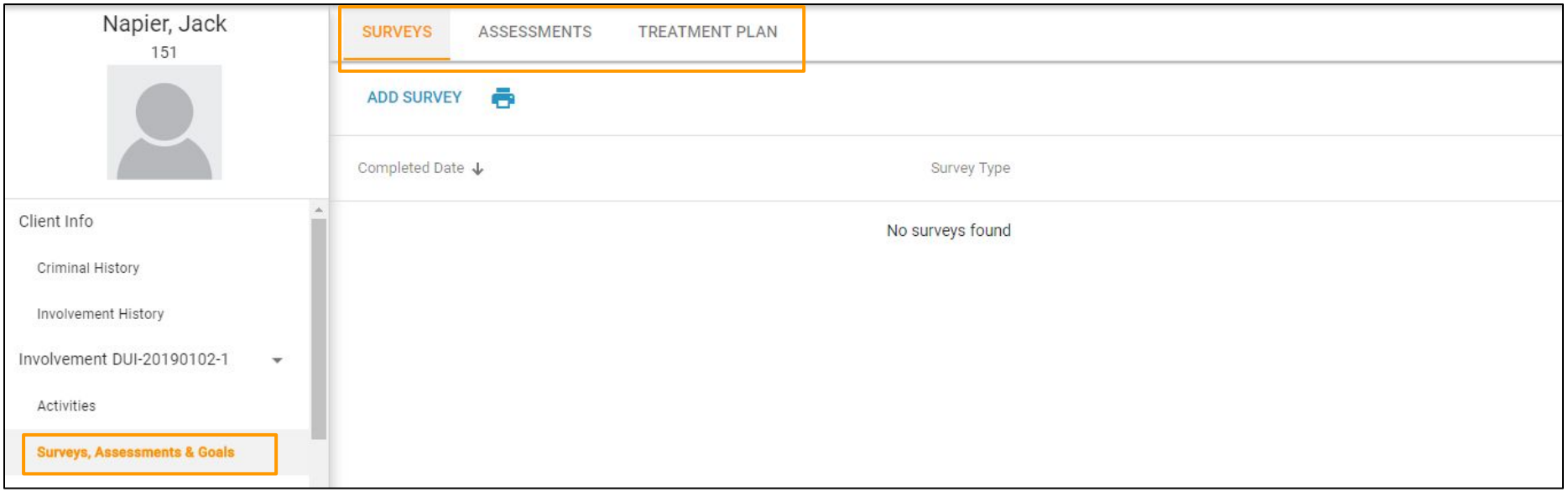
Subtopics:

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

Surveys, Assessments & Goals - Overview

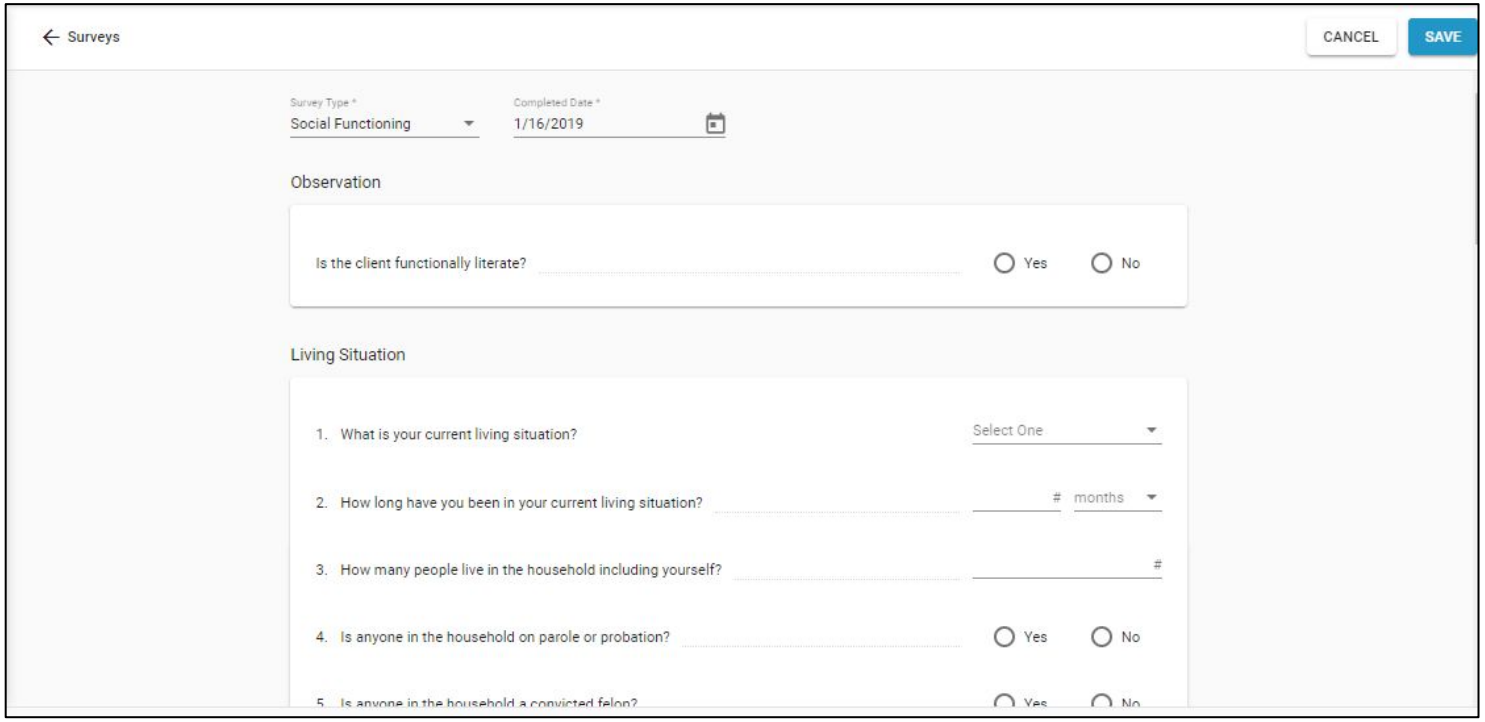
Back to Topics

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 typical completed at the beginning of the program, they can be administered at any time during the Client's participation.



Surveys, Assessments & Goals - Surveys

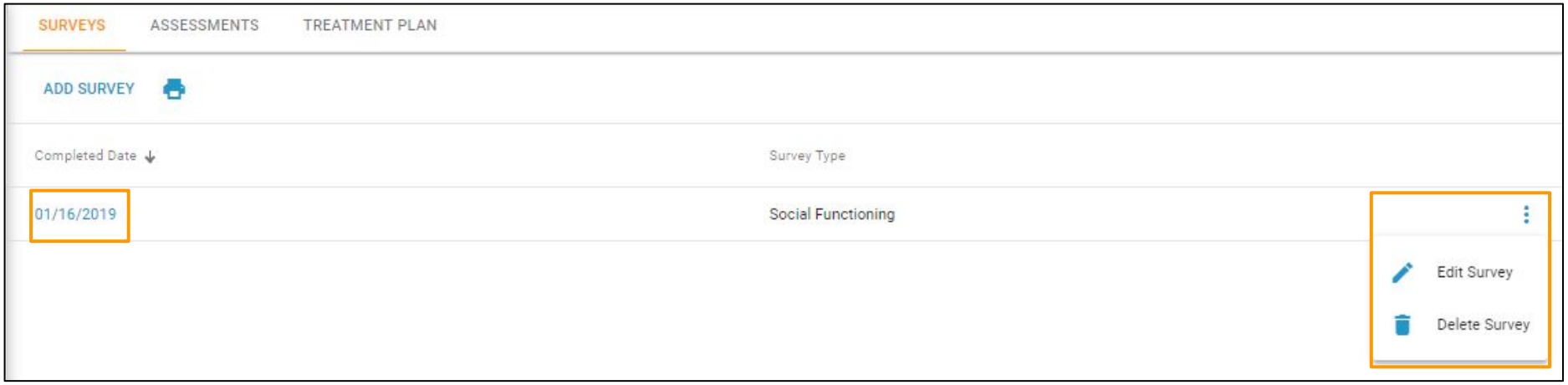
In the Survey section, Users can print a blank Survey document for the Client to complete. The User can add a new Survey by clicking on the Add Survey hyperlink. One example of a Survey in this section is a 19 question Social Functioning Survey. AutoMon will be adding an Exit Survey and Satisfaction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



Surveys, Assessments & Goals - Surveys

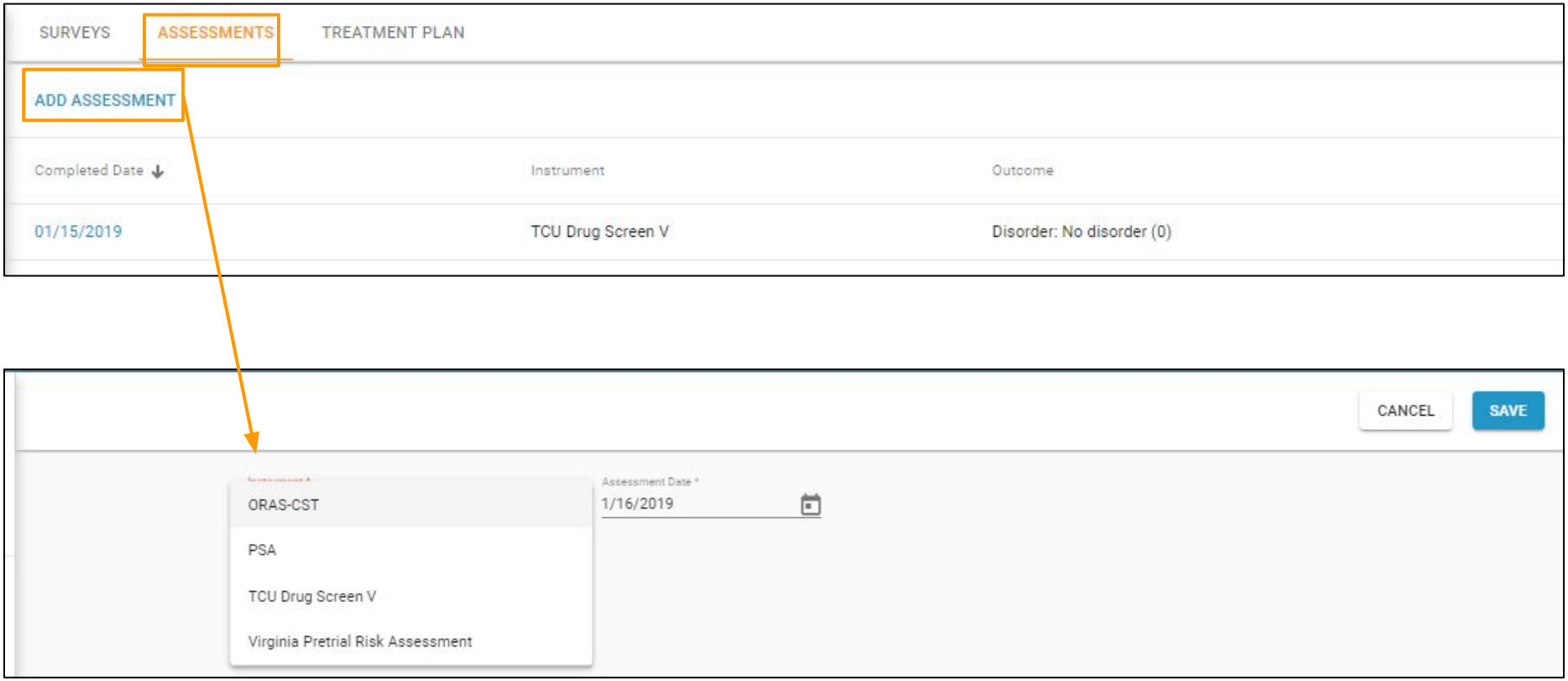
Back to Topics

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



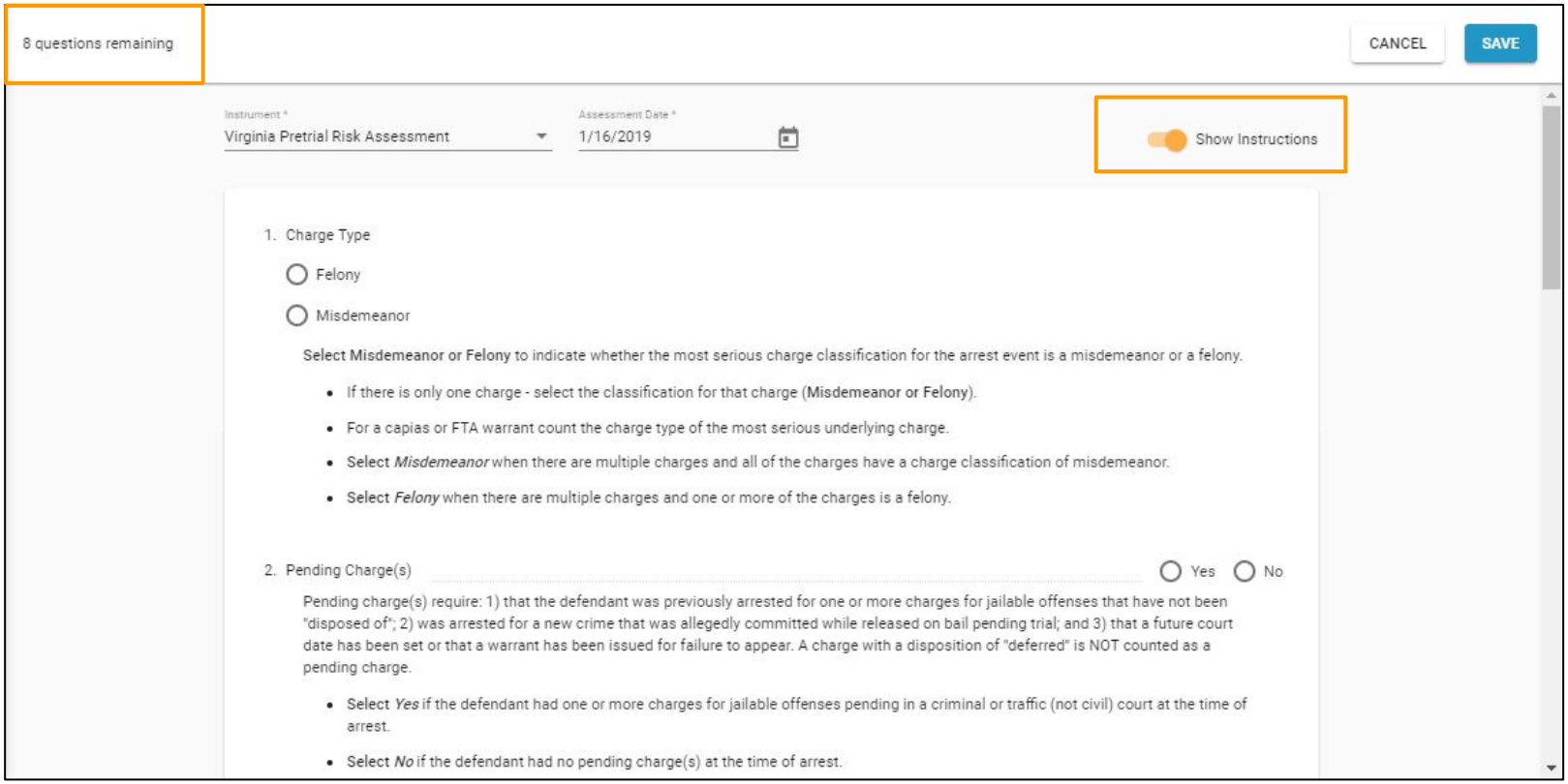
Surveys, Assessments & Goals - Assessments

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.



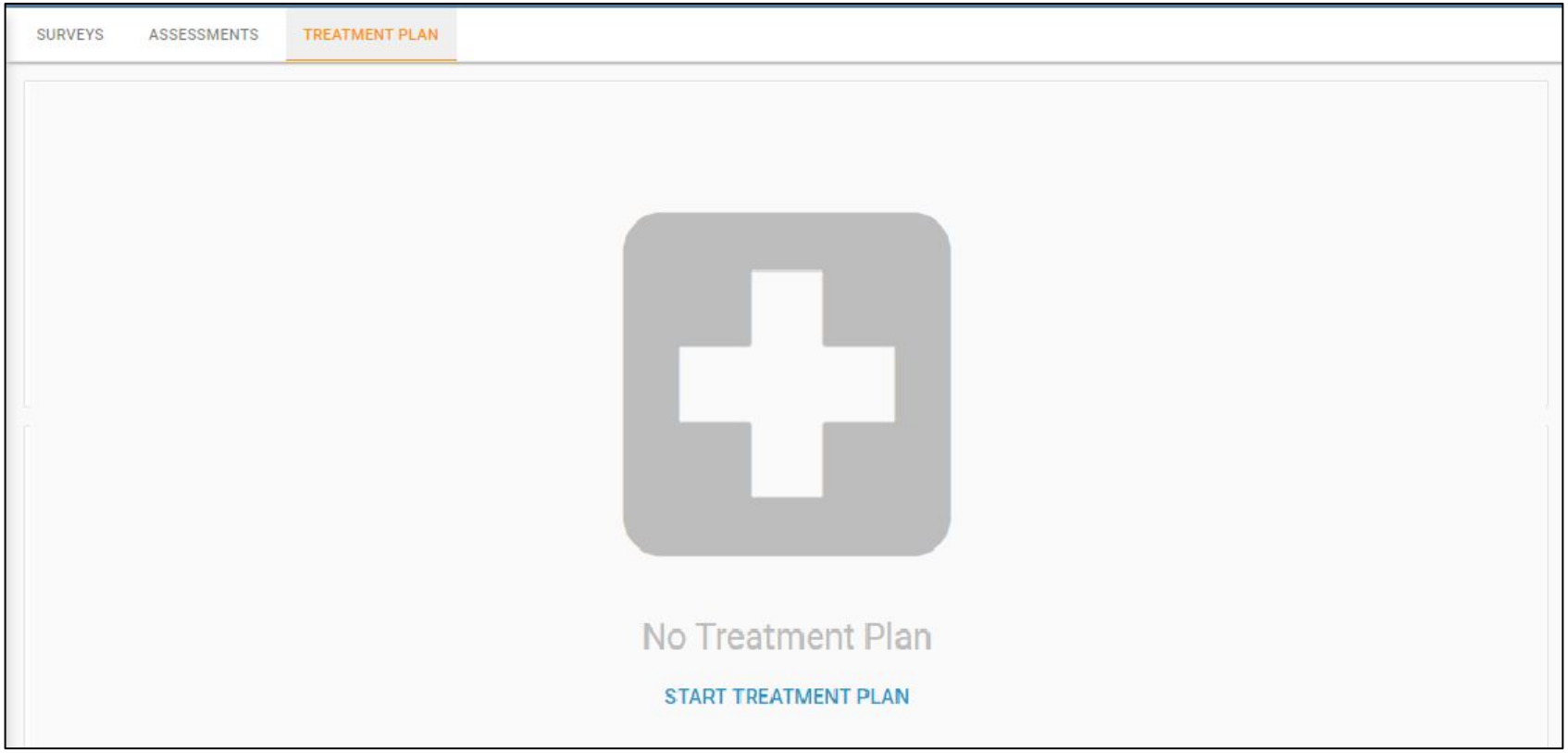
Surveys, Assessments & Goals - Assessments

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.



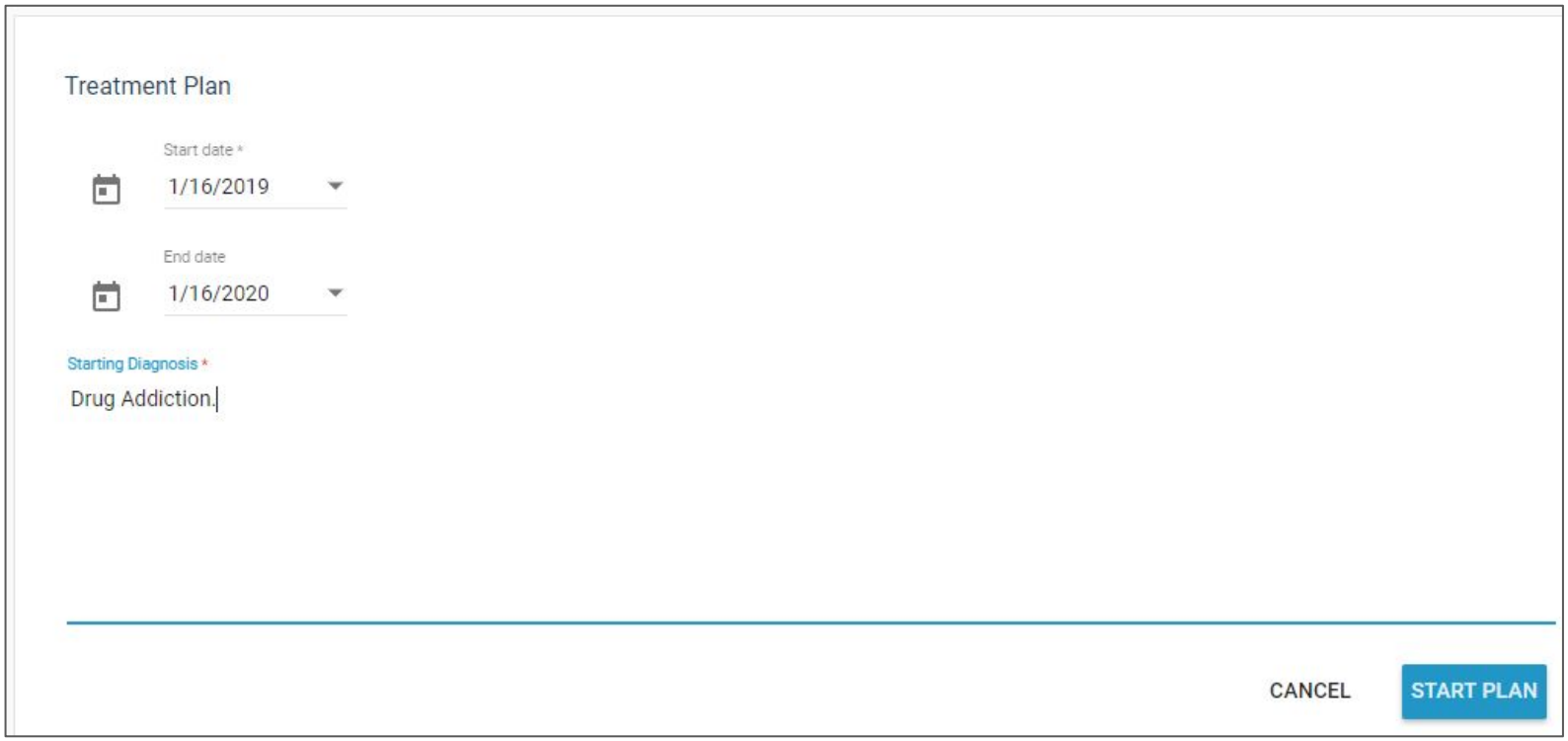
Surveys, Assessments & Goals - Treatment Plan

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



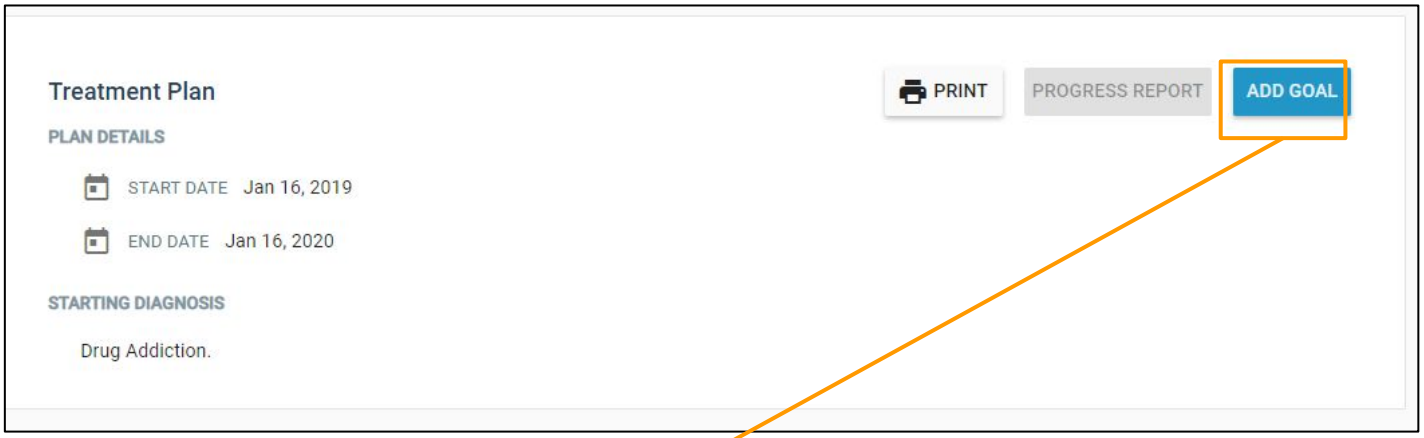
Surveys, Assessments & Goals - Treatment Plan

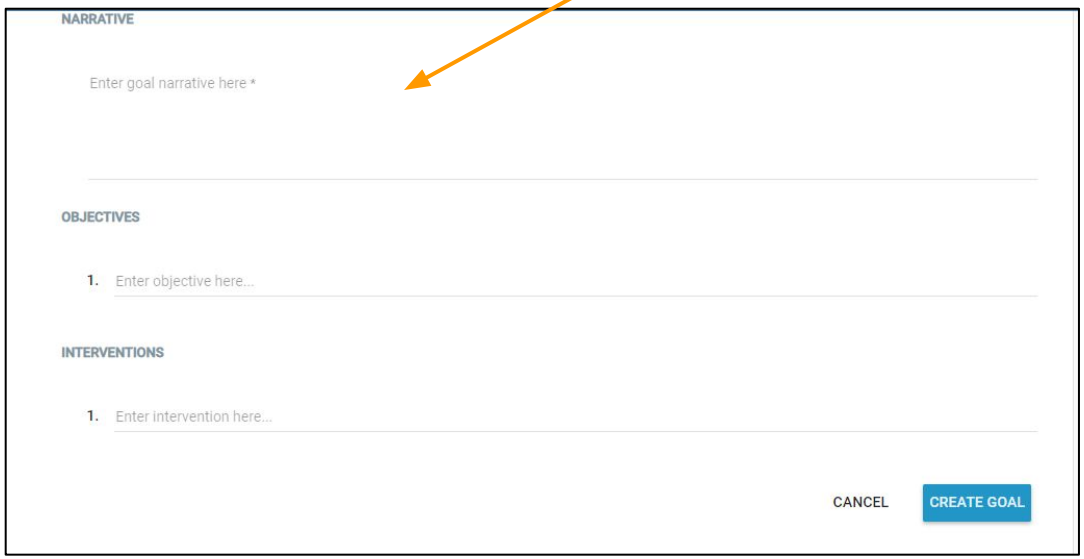
To start a Treatment Plan, Users enter the Start Date, End Date (optional), and the starting diagnosis.



Surveys, Assessments & Goals - Treatment Plan

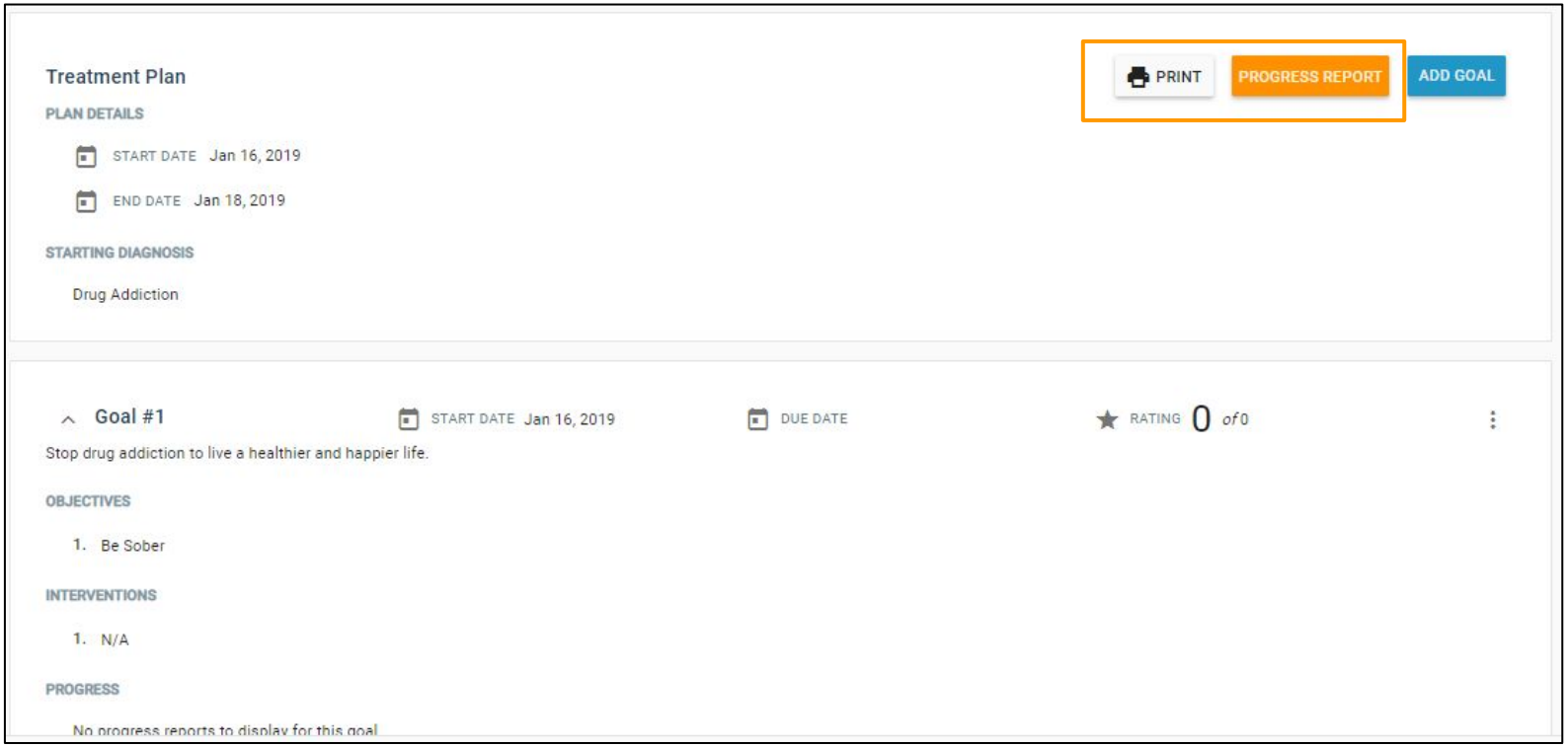
Once the Treatment Plan has been saved, the User will add Goals, Objectives, and Interventions.





AutoMon Innovative Solutions for Community-Based Corrections | Surveys, Assessments & Goals - Treatment Plan

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



Topic 18: Supervision

Back to Topics

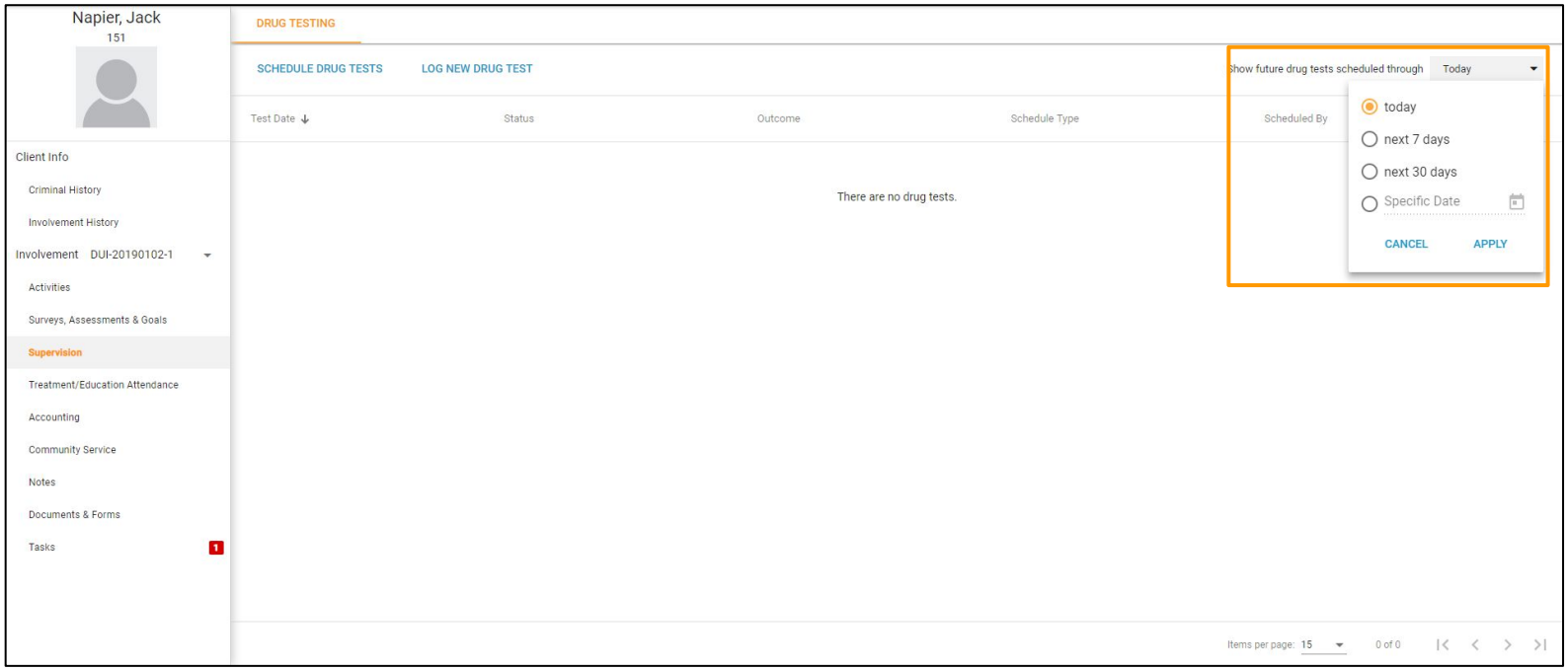
Subtopics:

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

AutoMon Innovative Solutions for Community-Based Corrections | Supervision - Overview

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.

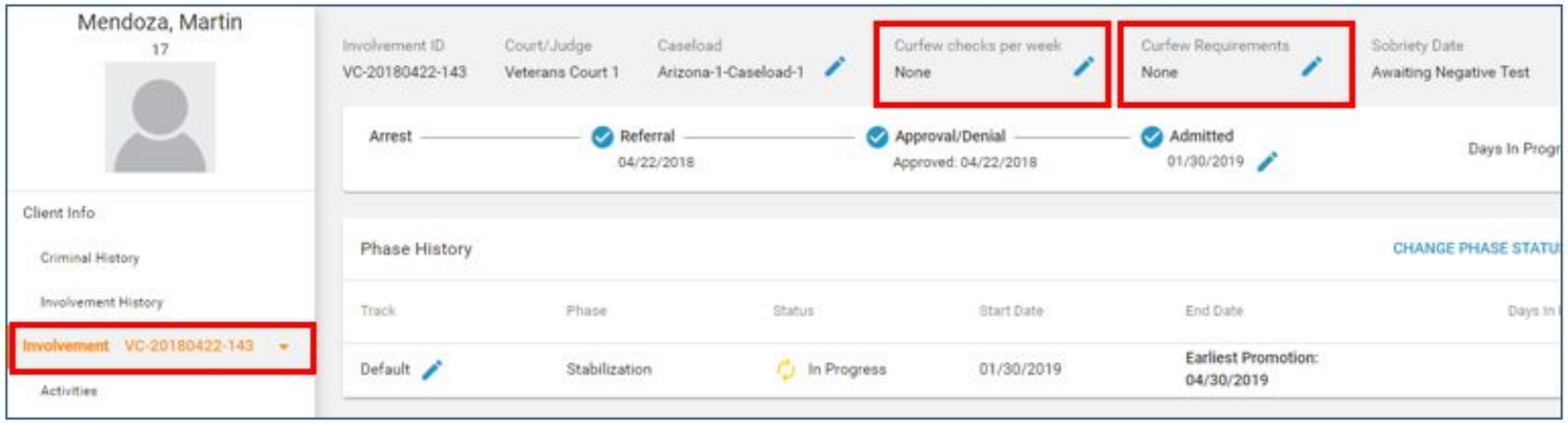
In a future release, AutoMon will enhance this section to also include managing the Client's hearings and contacts.



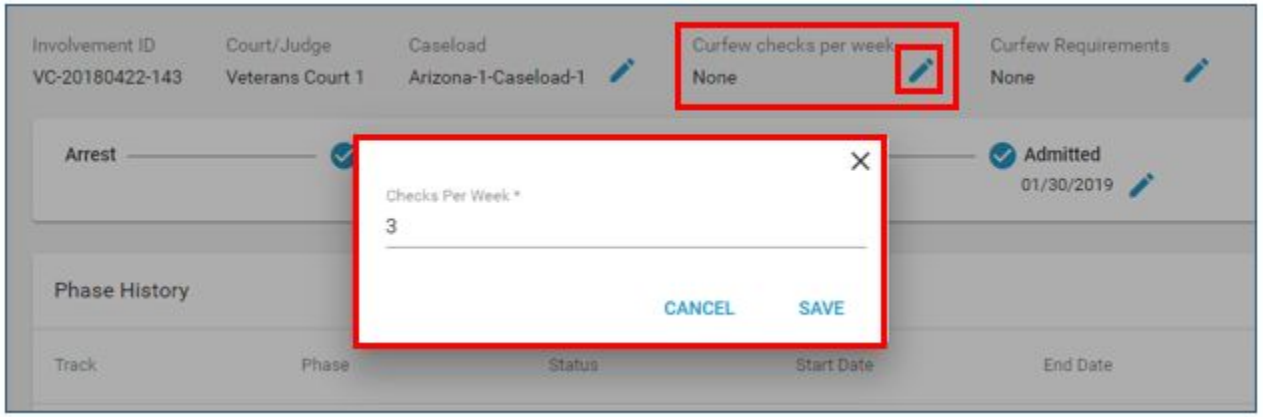
AutoMon Innovative Solutions for Community-Based Corrections | Supervision - Curfew Checks

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*.

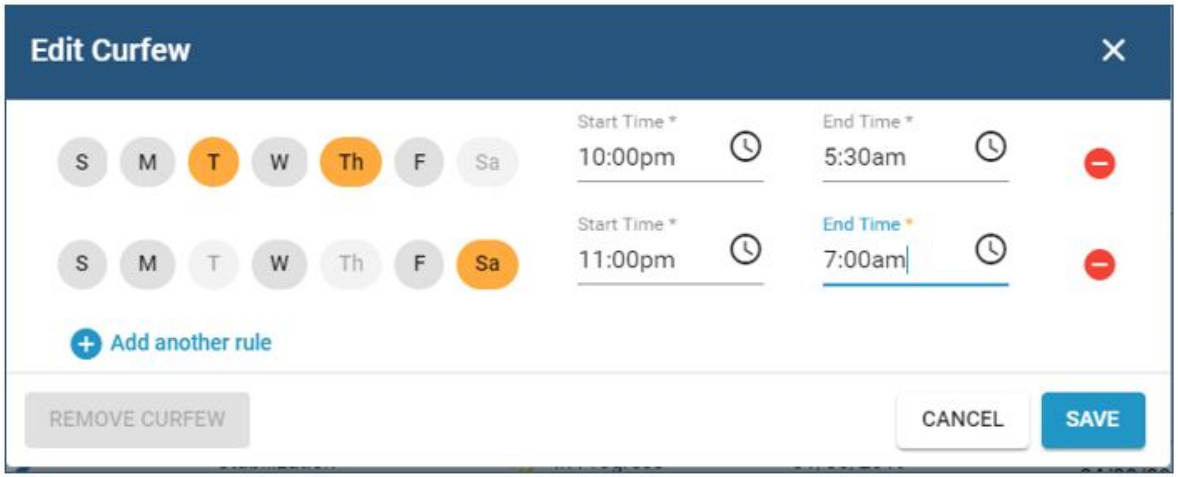


To edit the *Curfew Check per week* from the default of "None", click the edit (pencil) icon and select the desired number of Curfew Checks per week.



AutoMon | Supervision - Curfew Checks

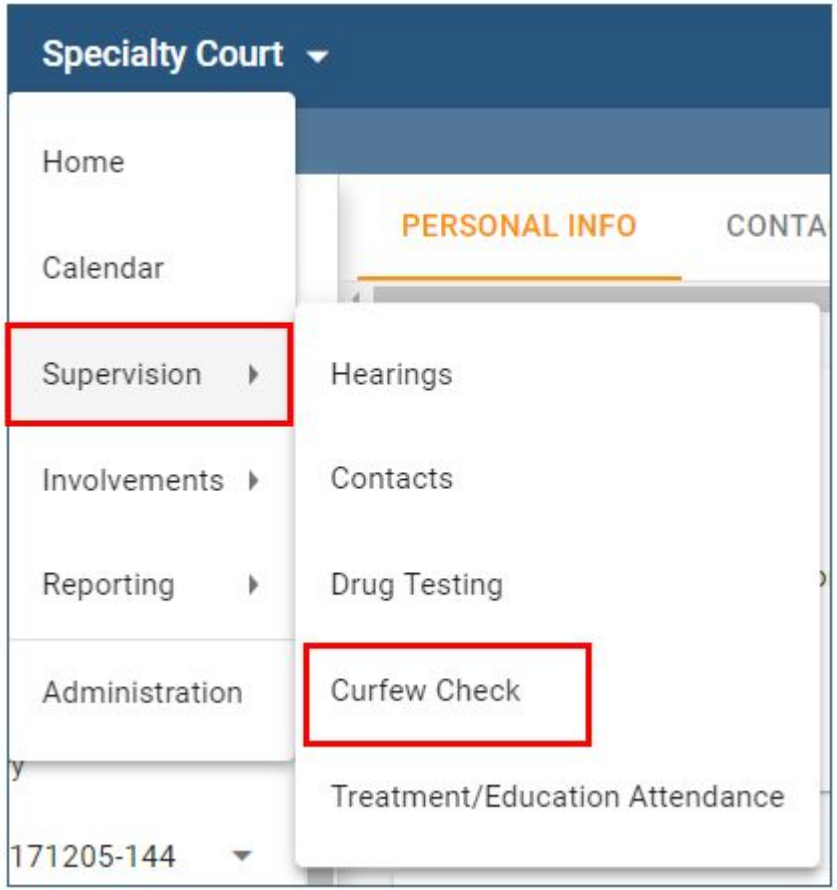
To edit *Curfew Requirements,* select the edit (pencil) icon to select the specific days of the week and time range (Start Time and End Time) the Client must adhere to curfew. The days selected will determine which days the Client will appear on the Curfew Check roster. Users have the ability to enter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



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

Supervision - Curfew Checks

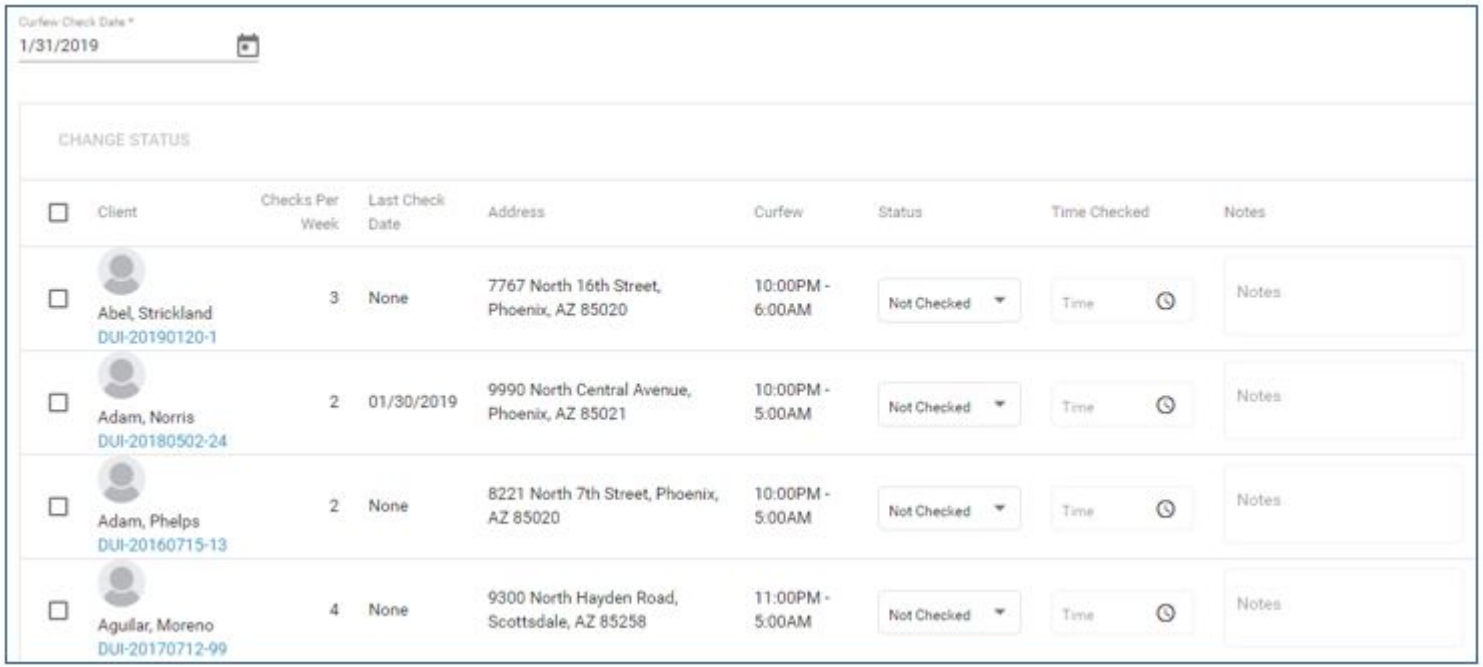
Users have the ability to record Curfew Checks for a given day. From the navigation menu select Supervision --> Curfew Check



Supervision - Curfew Checks

Back to Topics

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.

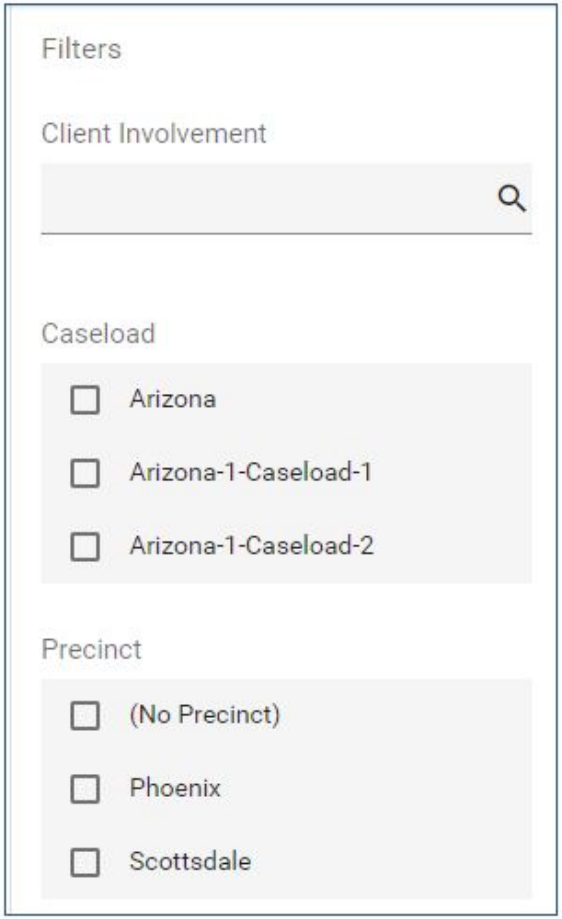


Curfew Checks can be recorded for any past date or today's date where the Client has a Curfew rule established. Curfew Checks cannot be recorded for a future date, although rosters are viewable for future dates

Supervision - Curfew Checks

Back to Topics

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.

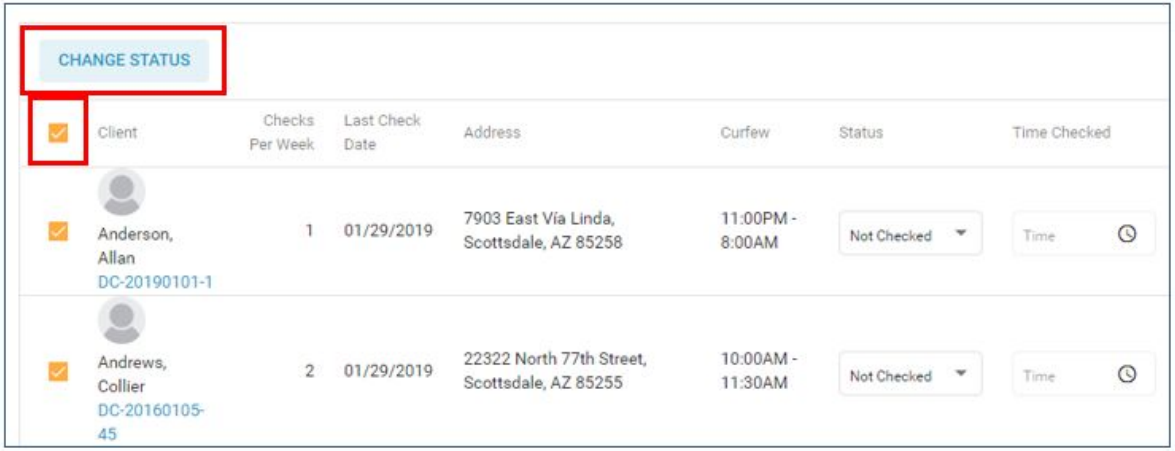


Supervision - Recording Curfew Checks

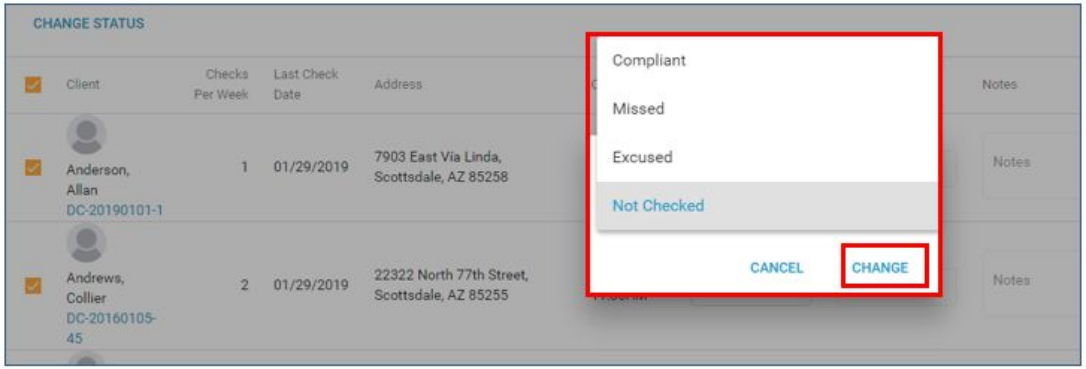
Back to Topics

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.*



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.

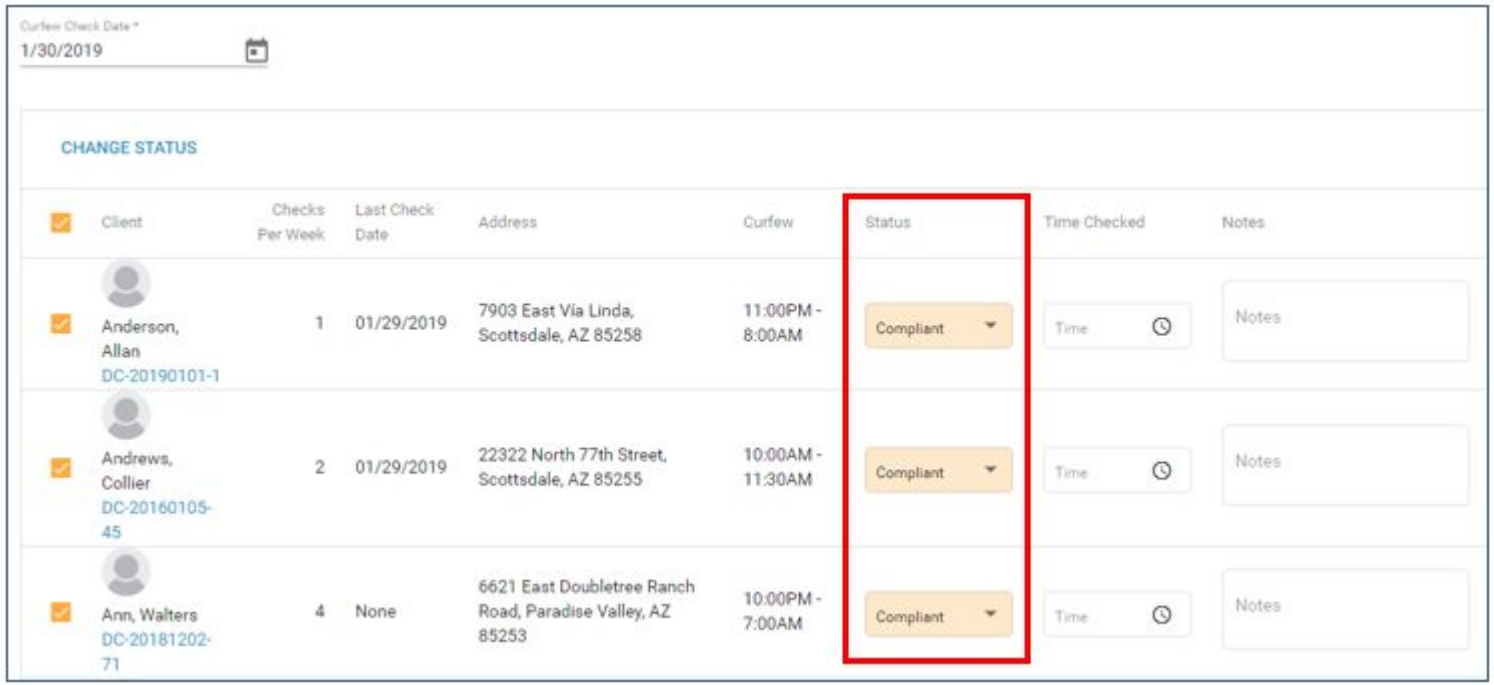


Supervision - Recording Curfew Checks

Back to Topics

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.

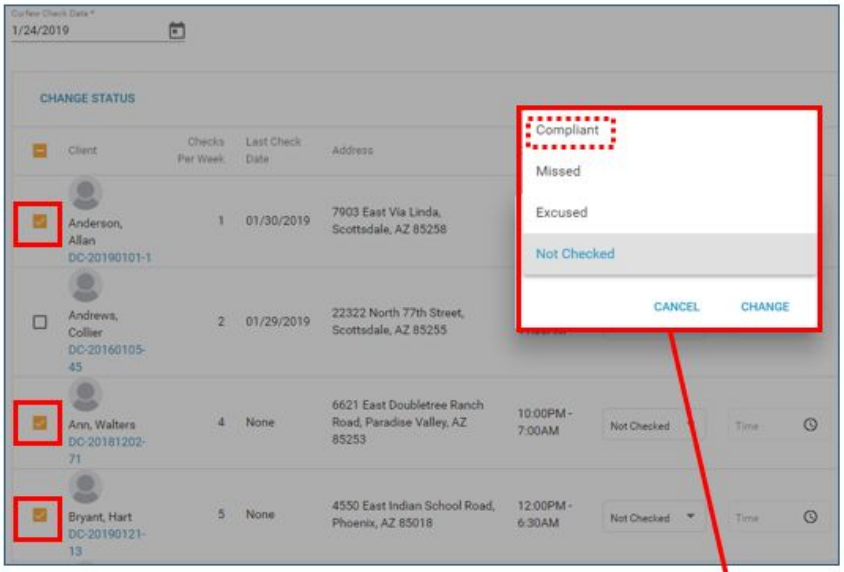


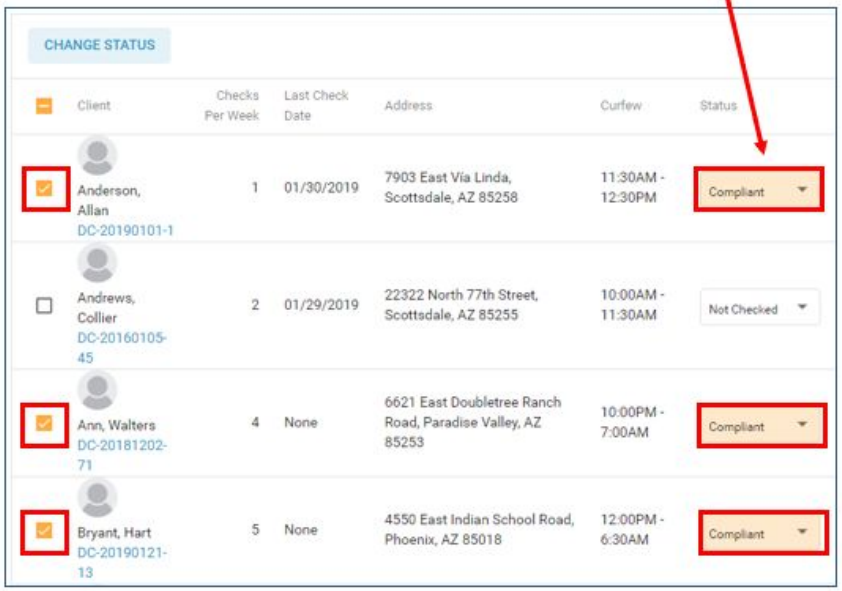
Supervision - Recording Curfew Checks

Back to Topics

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.



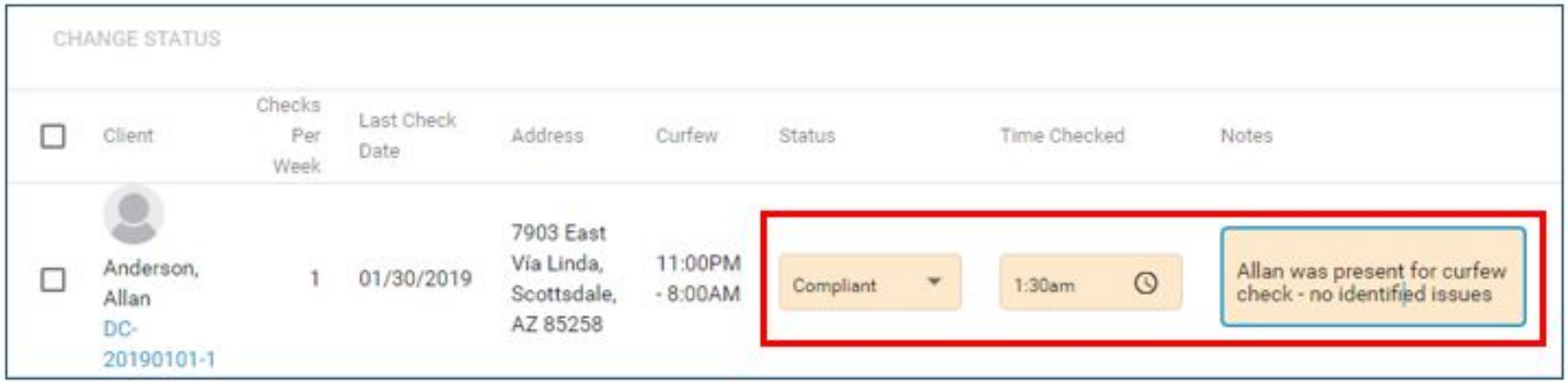


Supervision - Recording Curfew Checks

Back to Topics

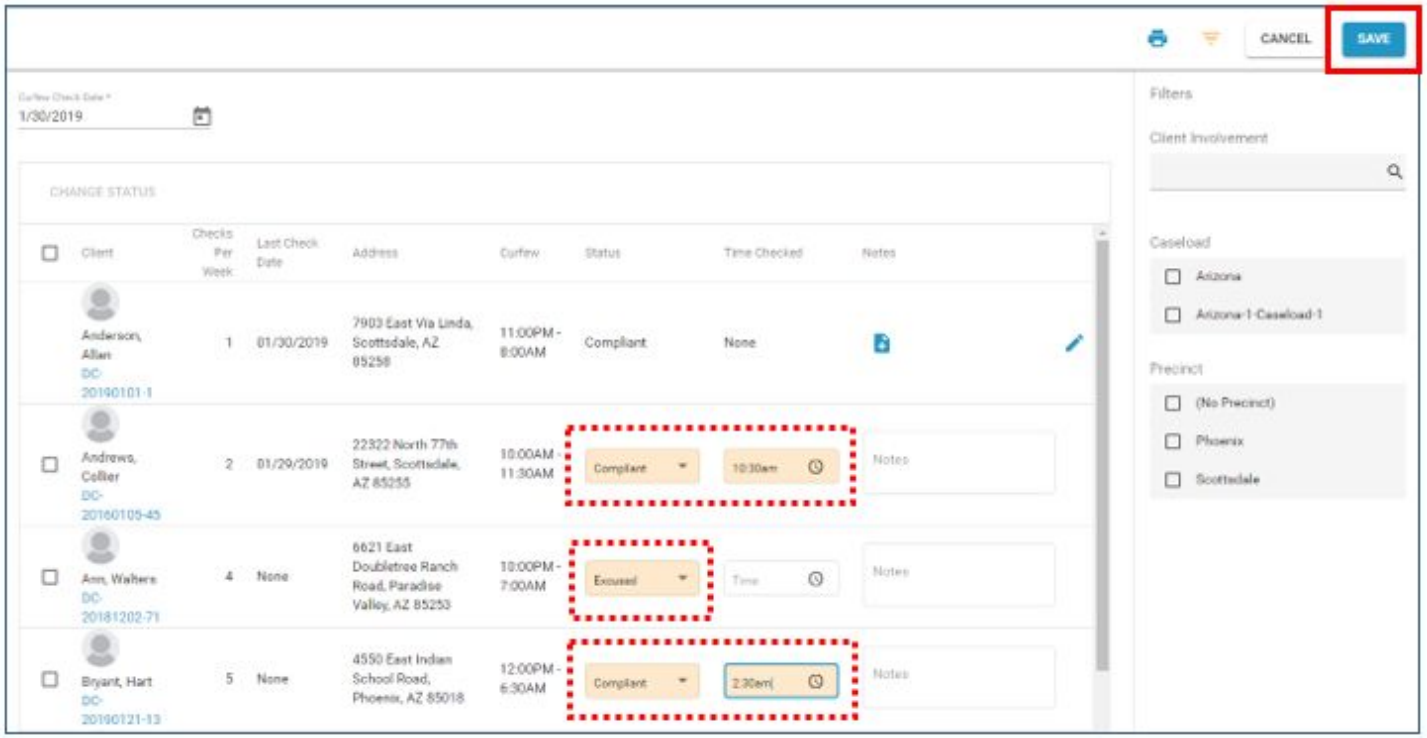
Recording Curfew Checks for an Individual Client

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.



Supervision - Recording Curfew Checks

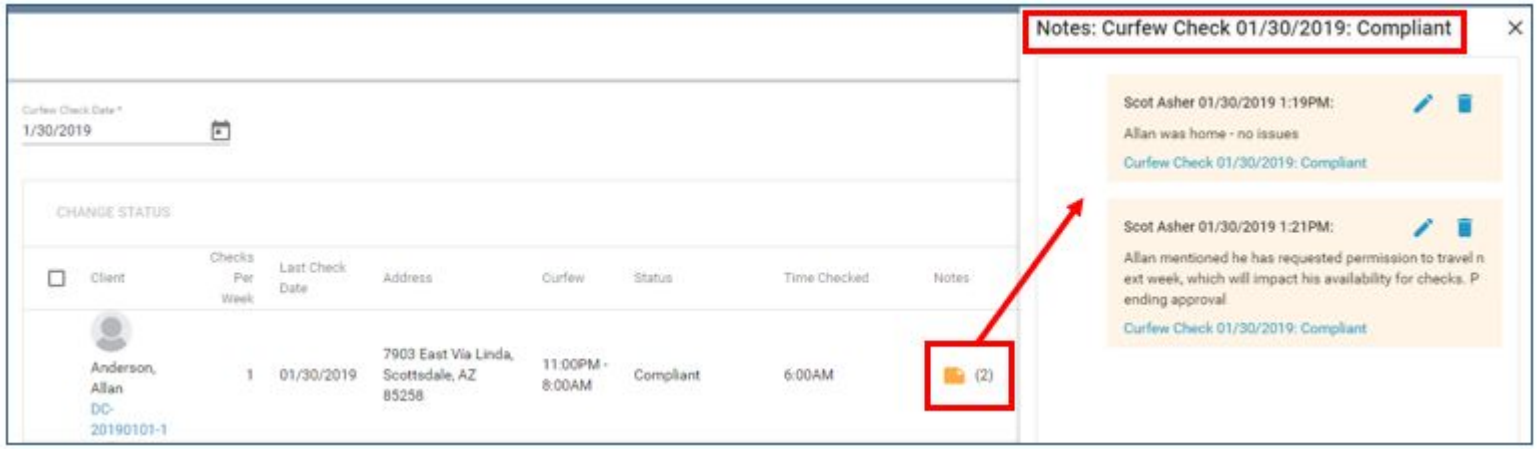
When recording Curfew Checks in all three scenarios – bulk, group/multiple or for an individual Client – Users ***must SAVE*** to record the changes that have been made. Any field shown in orange is data that will be saved to the Client record.



Supervision - Recording Curfew Checks

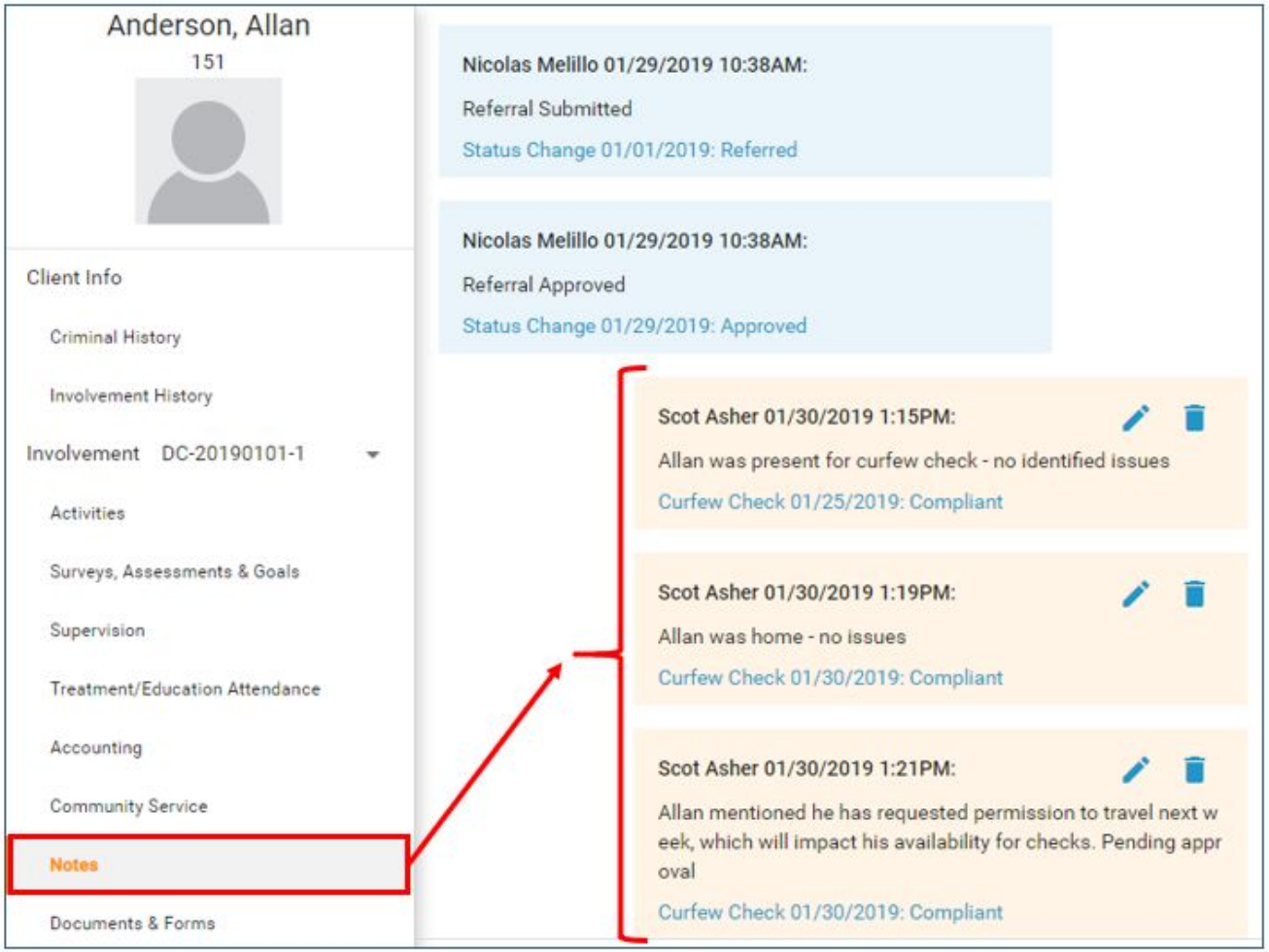
Any Notes recorded with a Curfew Check are indicated next to the Notes icon, indicating the number of Notes associated with that specific Curfew Check.

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



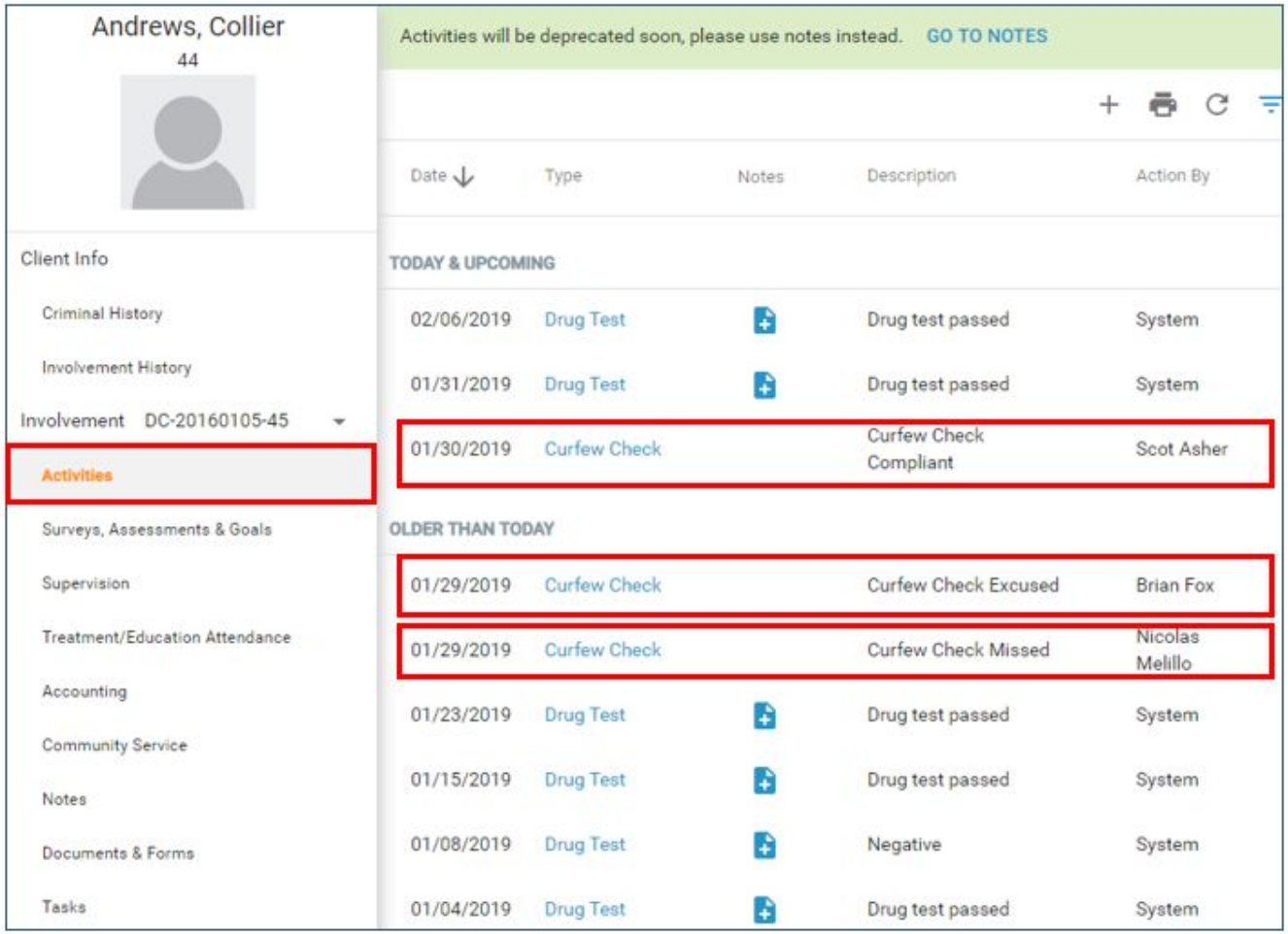
Supervision - Recording Curfew Checks

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



AutoMon Innovative Solutions for Community-Based Corrections | Supervision - Recording Curfew Checks

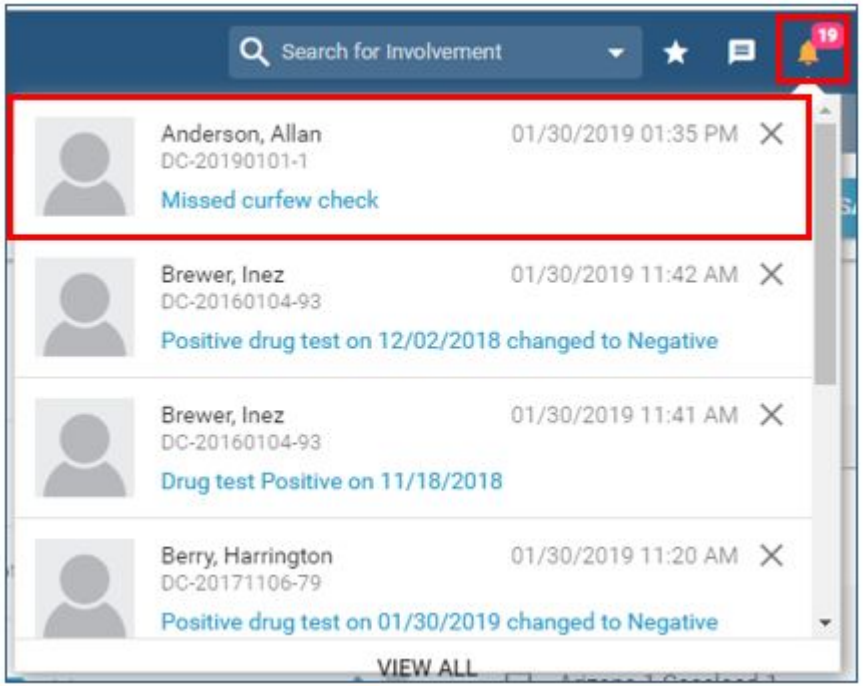
Curfew Checks – and the status of the Check (i.e., Compliant, Missed, Excused) – are also recorded under Activities.



Supervision - Recording Curfew Checks

Back to Topics

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

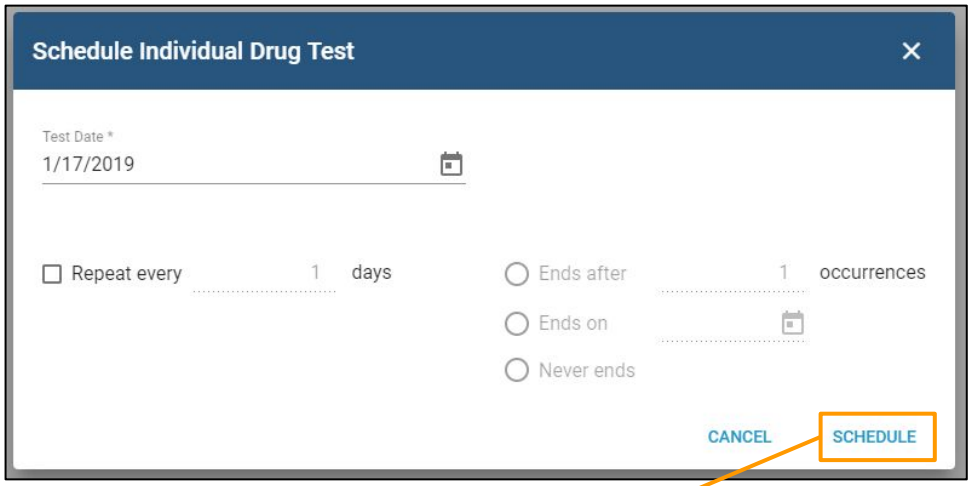
Users with the Edit Curfew Checks permission have the ability to edit a previously recorded Curfew Check – if a User does not have the permission to edit Curfew Checks, the Change Status, Cancel and Save buttons are disabled.

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

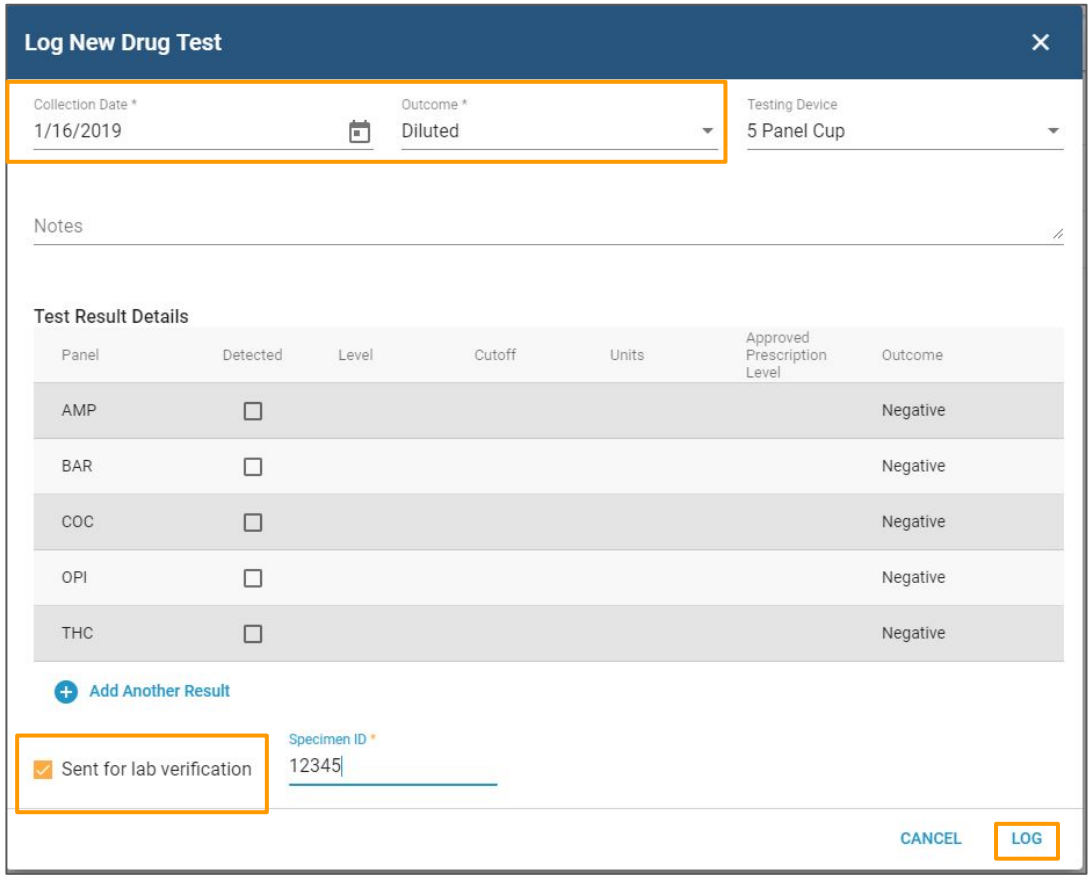
Users have the ability to schedule an individual drug test within the Supervision section by clicking on the *Schedule Drug Test* hyperlink. Users will be presented with a dialog box that will allow them to select the date and frequency. Users can also schedule just one individual drug test by indicating 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.



Supervision - Log New Drug Test

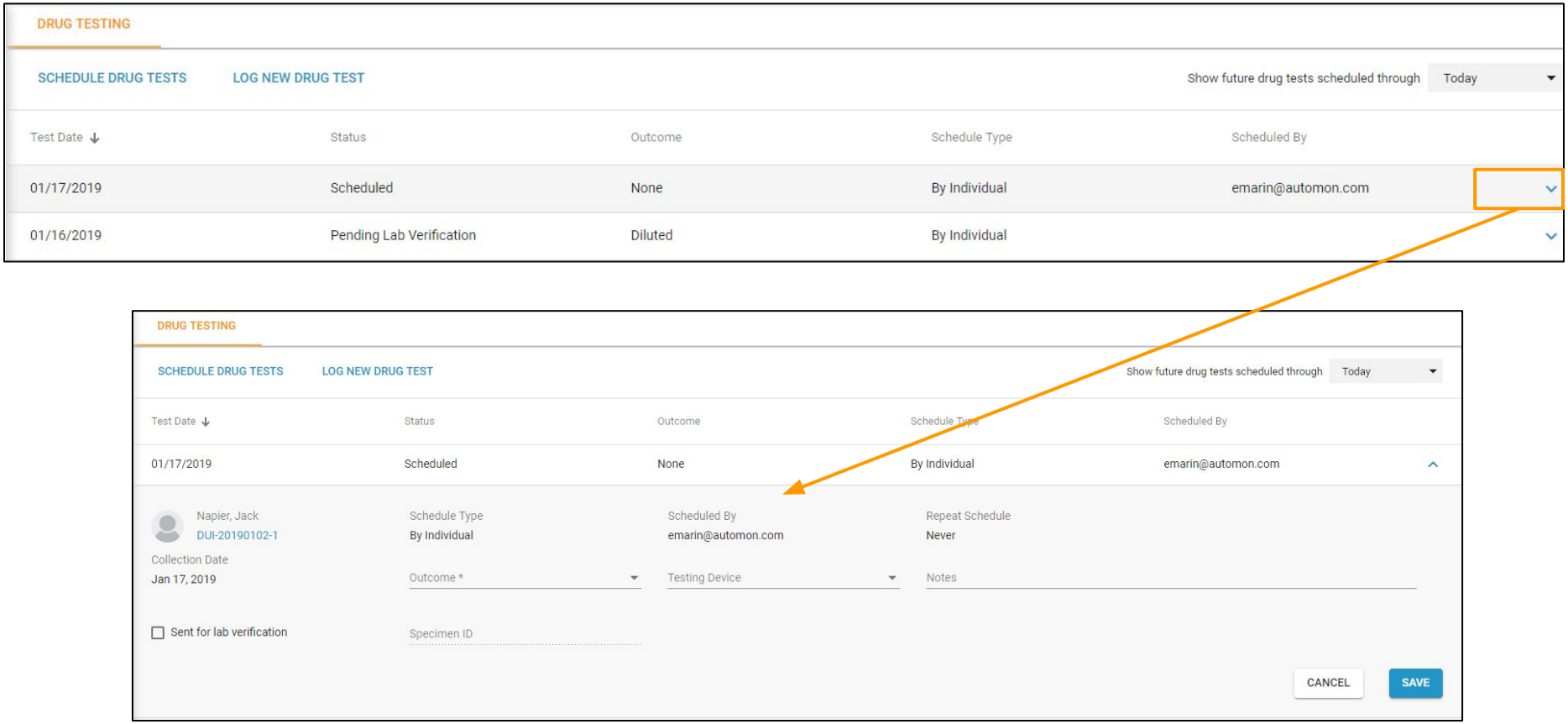
Back to Topics

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.



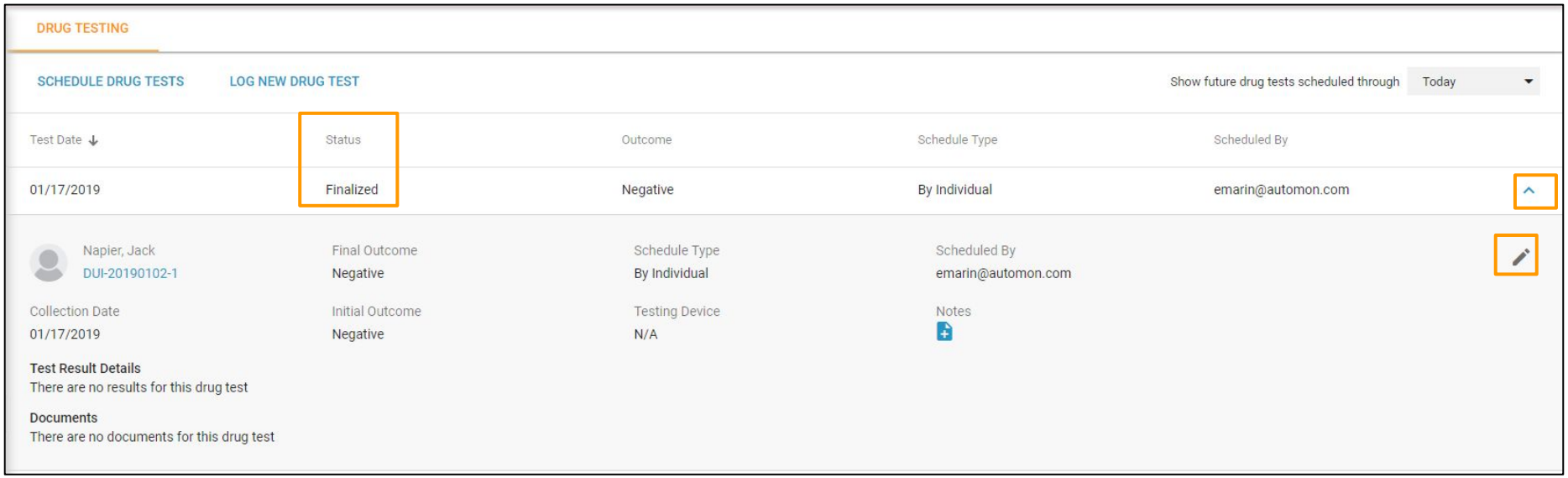
Supervision - Completing a Drug Test

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.



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.



Back to Topics

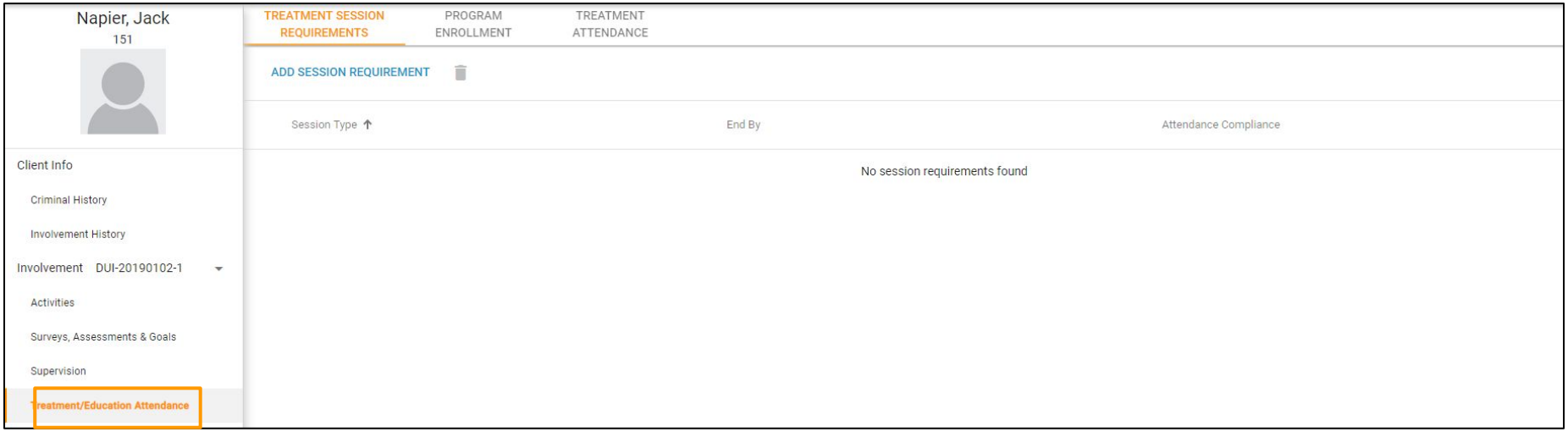
Topic 19: Treatment/Education Attendance

Subtopics:

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

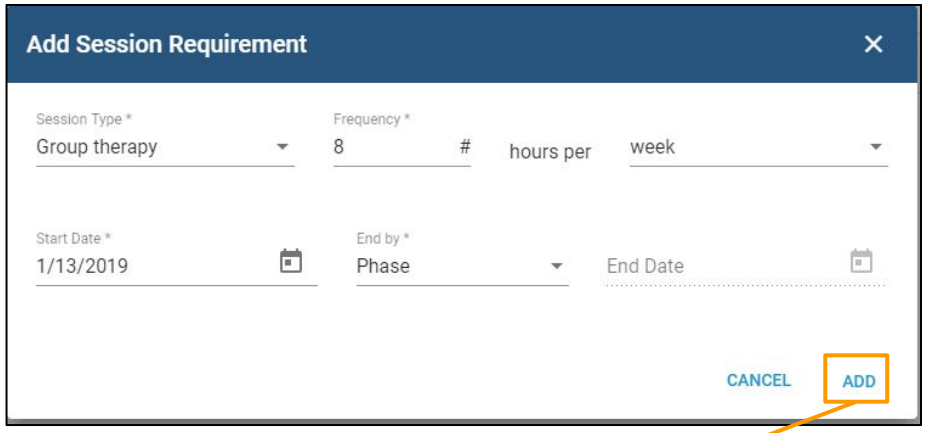
Treatment/Education - Overview

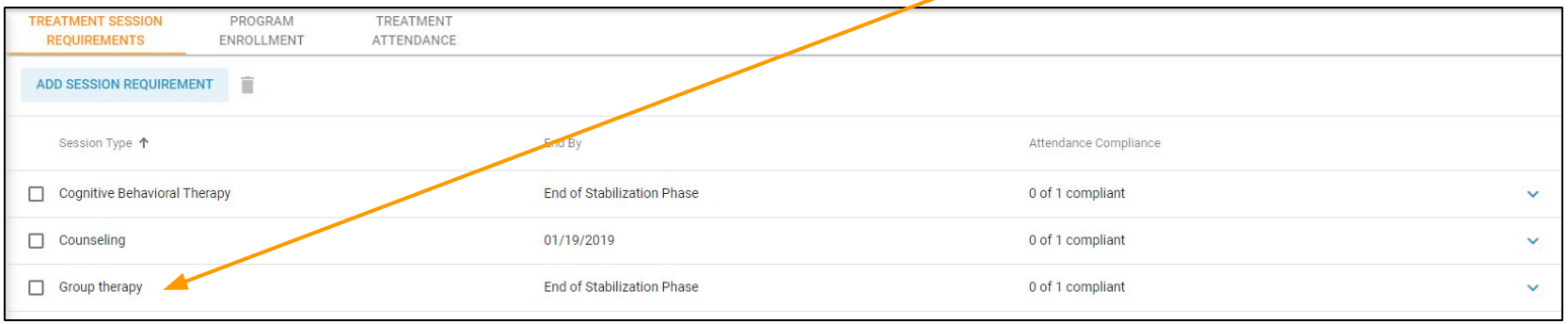
Under the Treatment/Education Attendance section, Users have the ability to add session requirements, enroll the Client into a Program, and mark attendance. This section is specific to treatment and/or education sessions.



Treatment/Education - Session Requirements

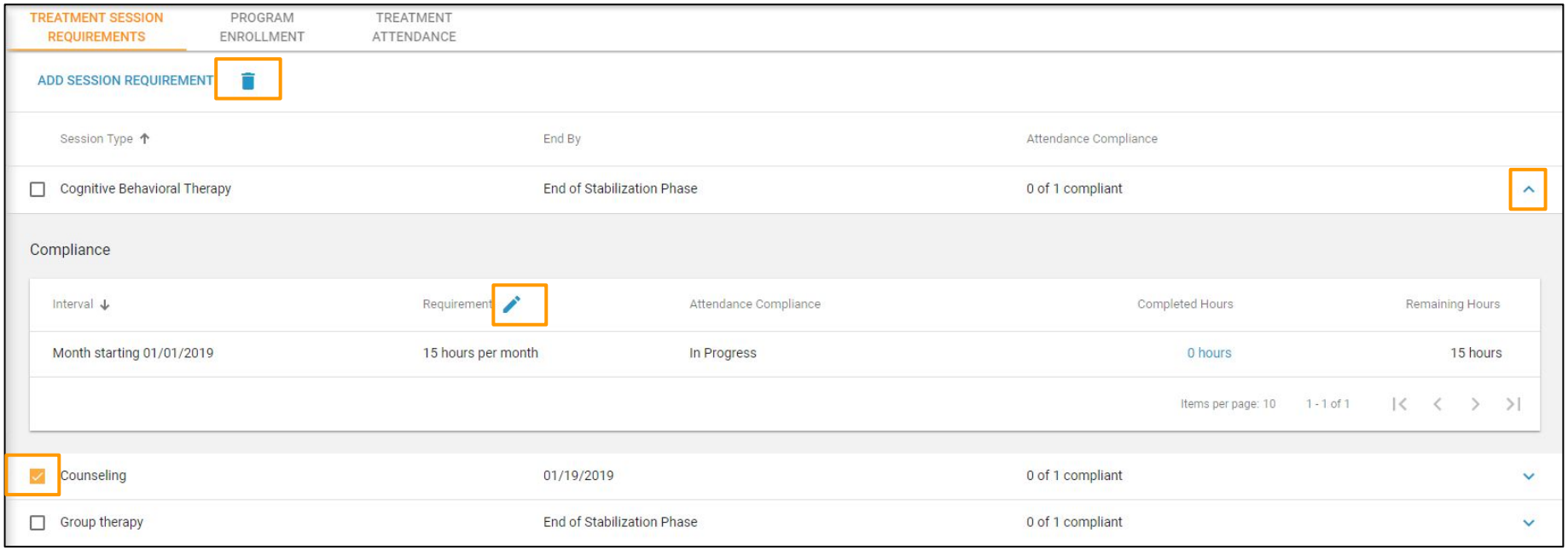
When clicking the Add Session Requirement hyperlink, Users have the ability to add Session requirements for a specific Client. The User will be required to select a Session Type, number of hours per either week or month, a start date, and an end date. The end date can be a specific date at the end of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





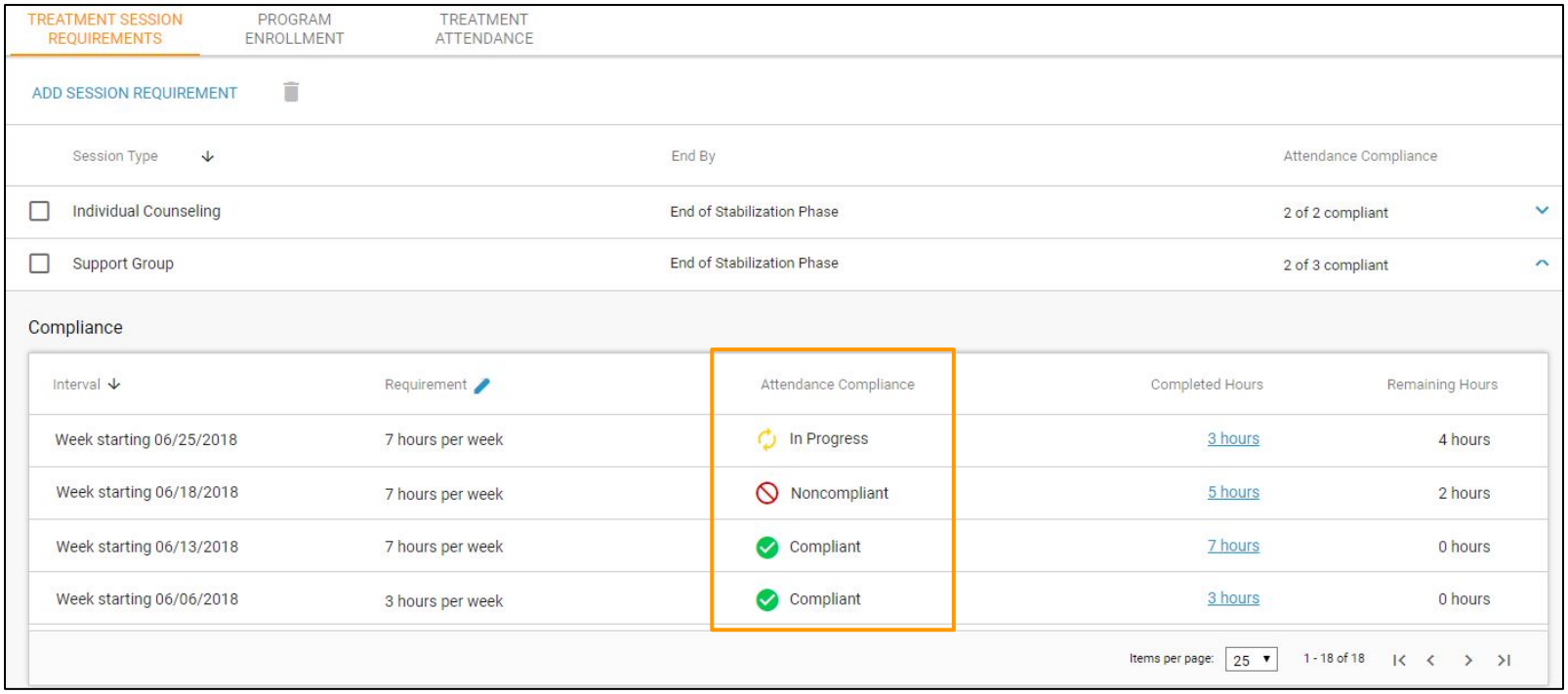
Treatment/Education - Session Requirements

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.



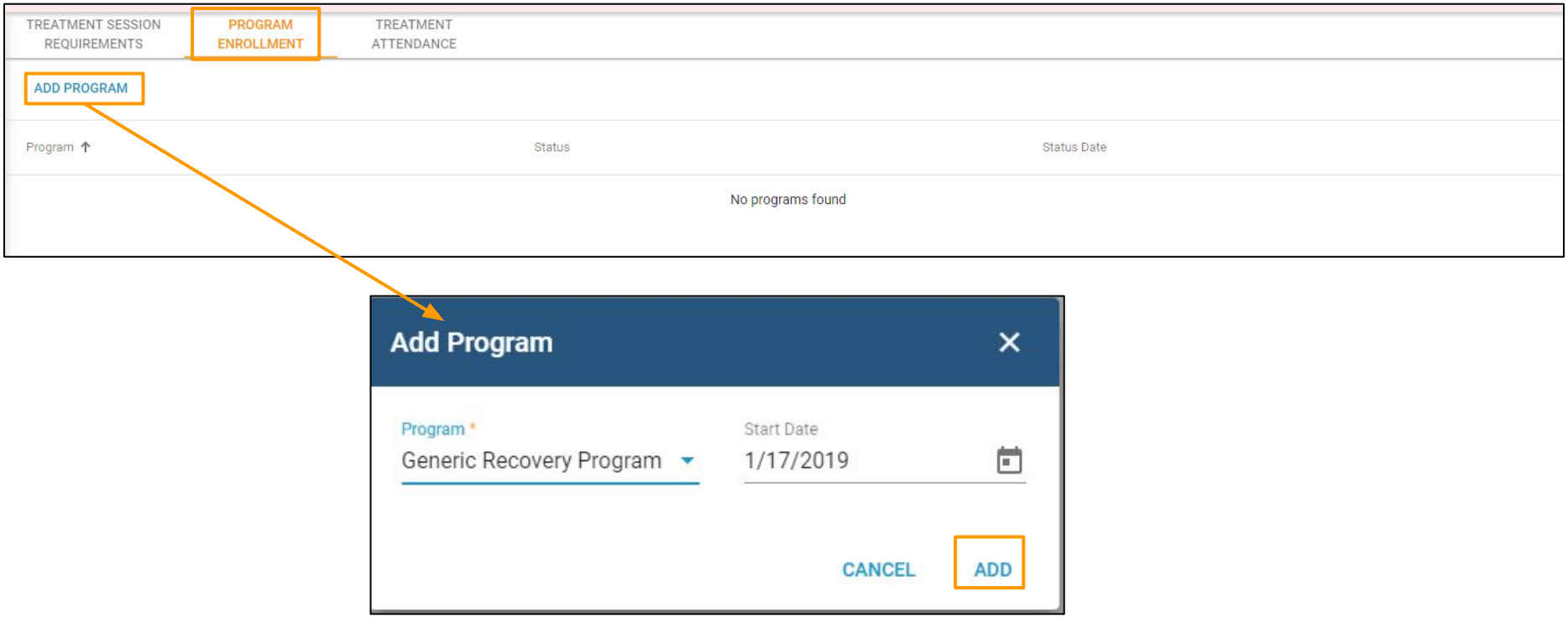
AutoMon Innovative Solutions for Community-Based Corrections | Treatment/Education - Session Requirements

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.



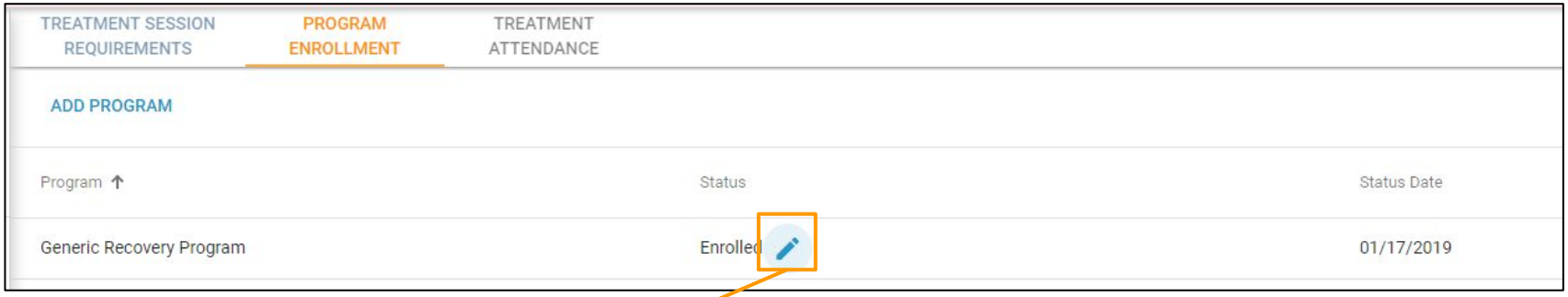
Treatment/Education - Program Enrollment

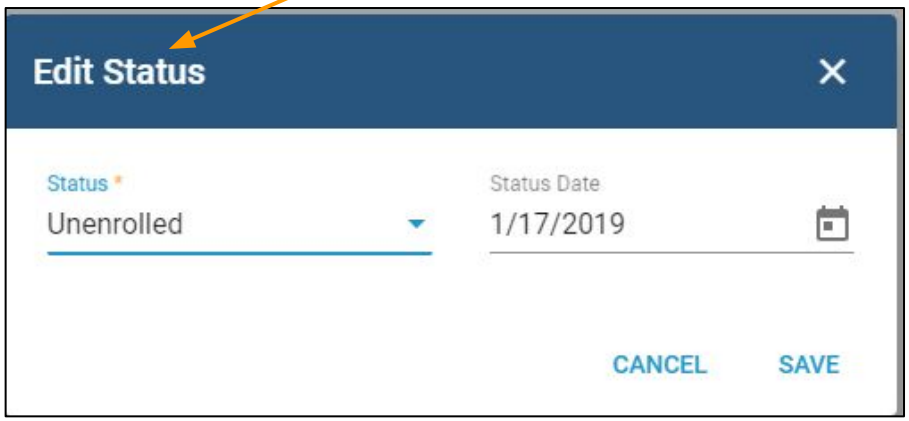
Once the Client has been set up with Session Requirement, Users would then enroll the Client into the Program they will be participating in, in order to meet those session requirements. The User would click on the *Add Program* hyperlink to enroll the Client. Users can also enroll the Client from the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



Treatment/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.

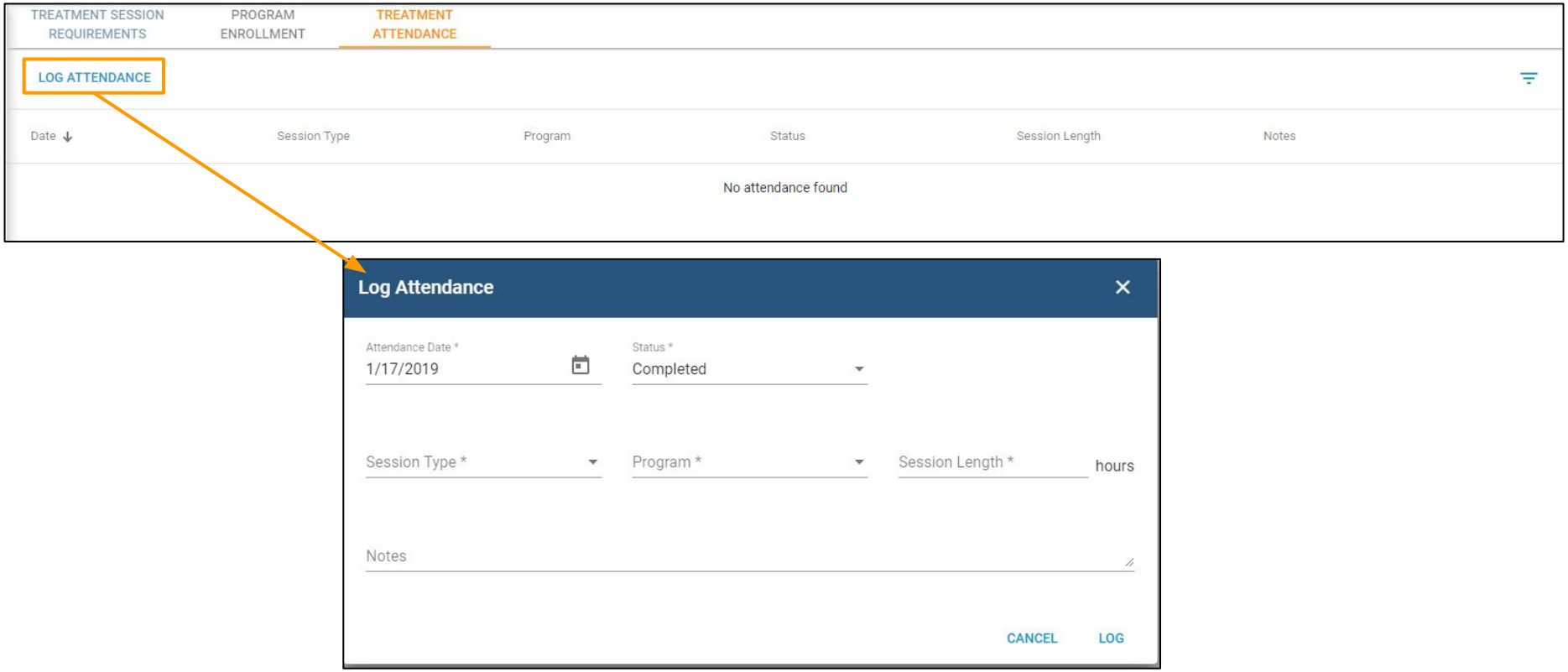




Treatment/Education - Treatment Attendance

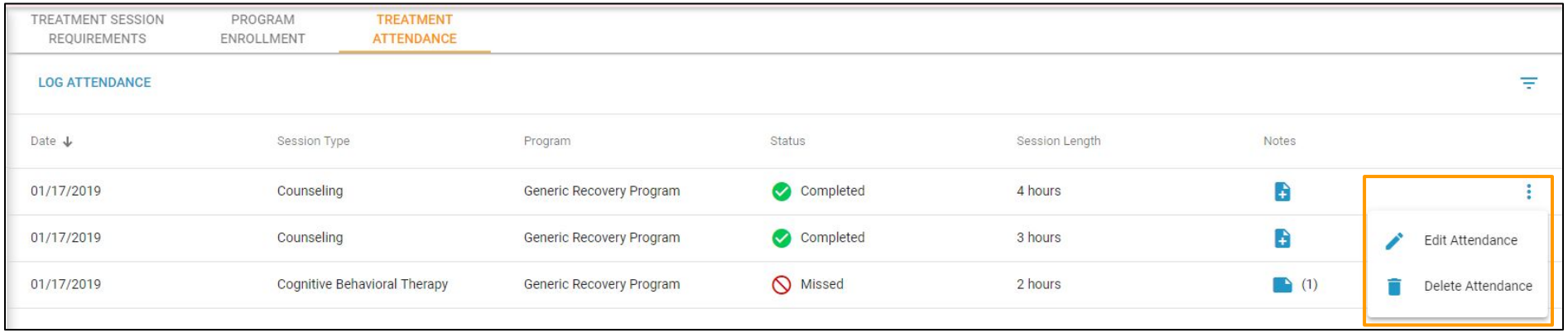
Users can log Treatment Attendance by clicking on the Log Attendance hyperlink. Users can also perform this function on the Batch Treatment Attendance Task listing. When logging attendance, Users are required to enter the attendance date, status (Completed, Excused, or Missed), session type, program,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

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



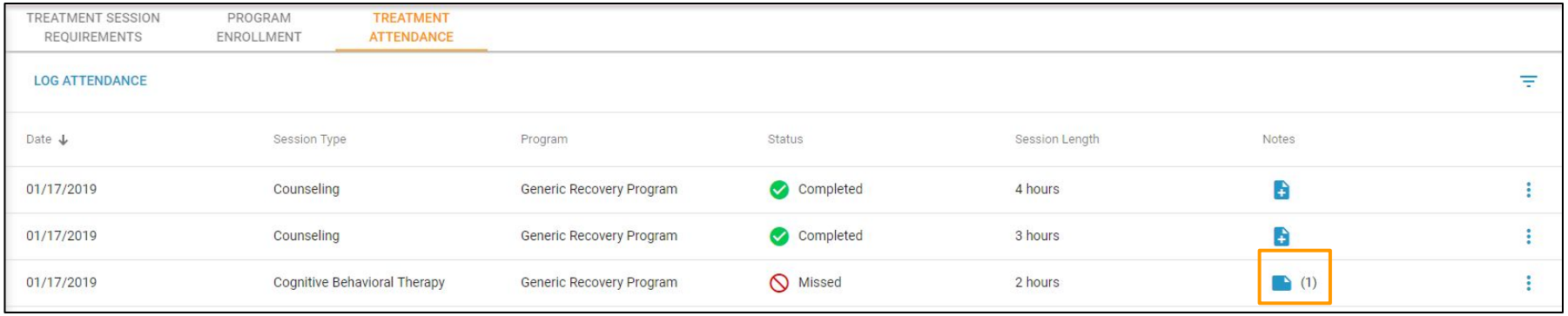
Treatment/Education - Treatment Attendance

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.



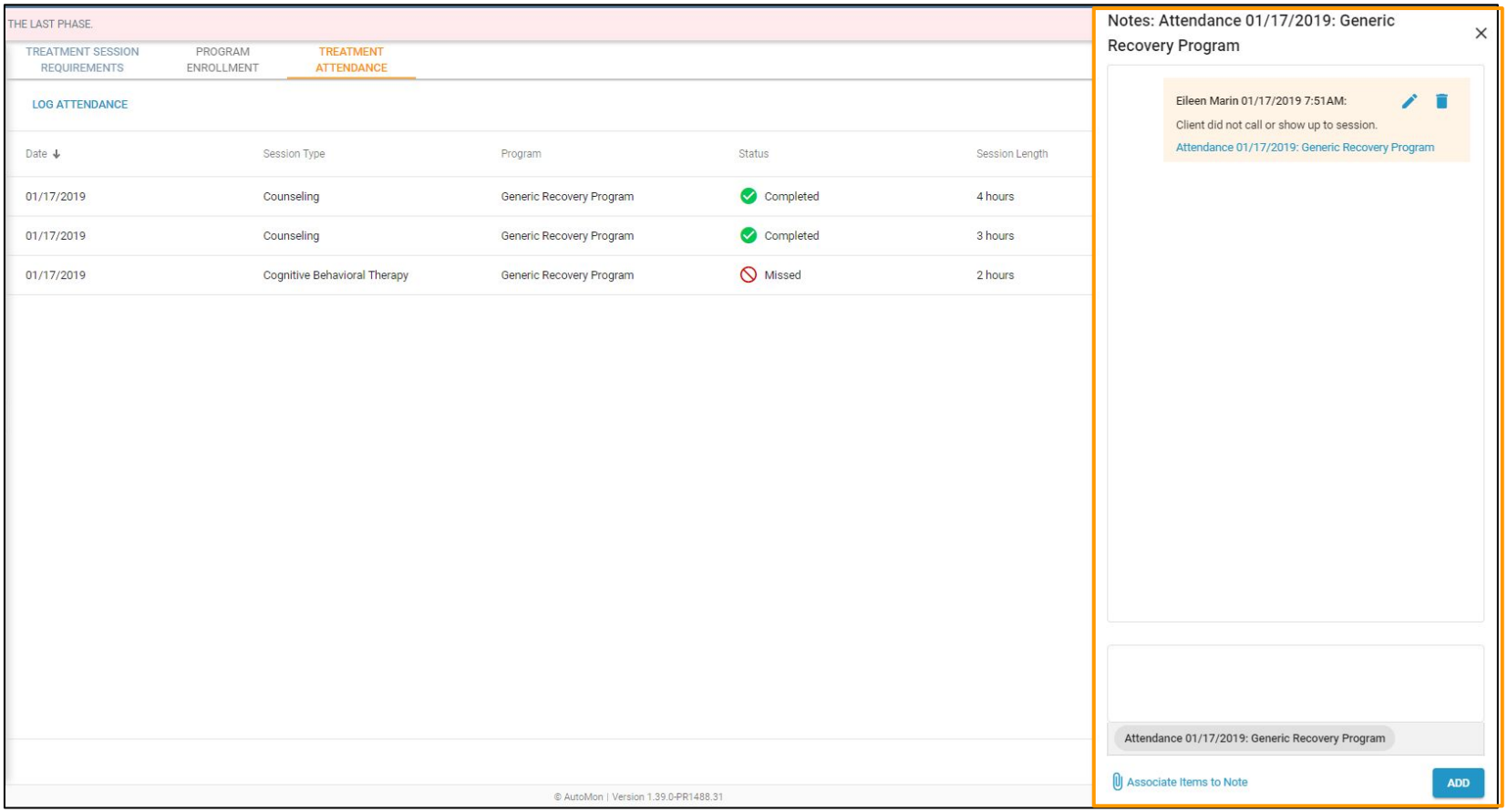
Treatment/Education - Treatment Attendance

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.



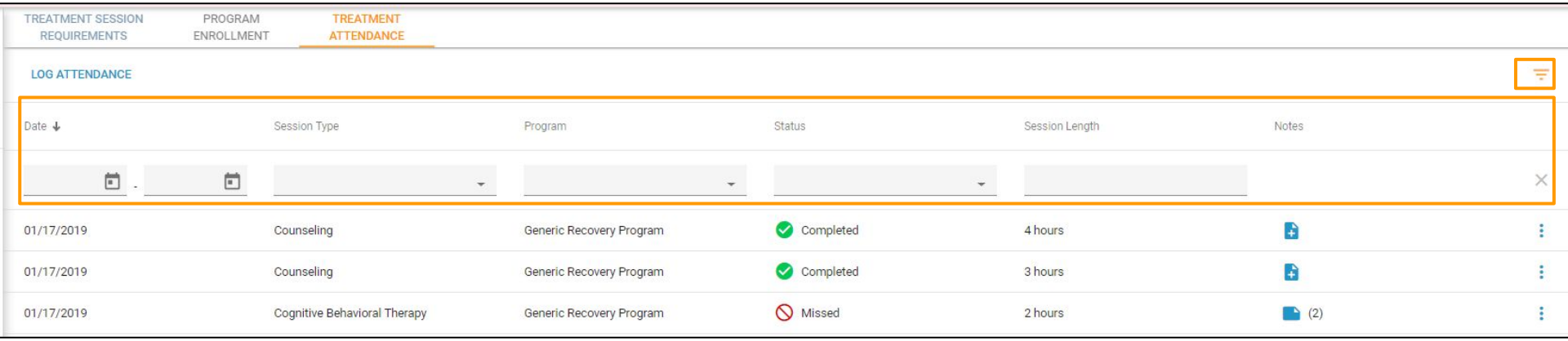
Treatment/Education - Treatment Attendance

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.



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.



Topic 20: Accounting

Back to Topics

Subtopics:

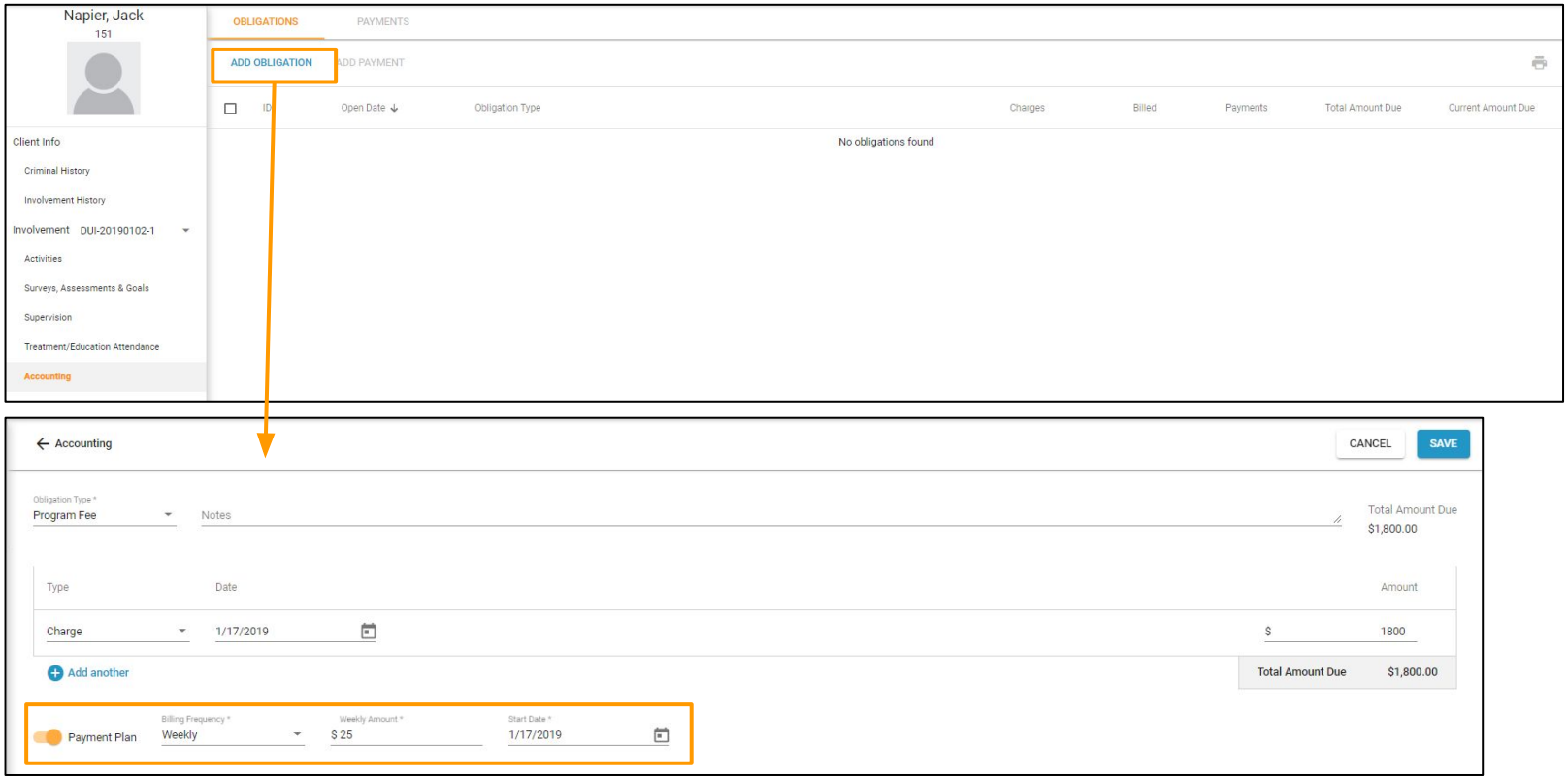
1. Overview
2. Obligations
3. Add Charge
4. Editing Payment Plan
5. Suspend Payment Plan
6. Reinstate Payment Plan
7. Add Credit
8. Payments
9. Printing Reports

AutoMon Innovative Solutions for Community-Based Corrections | Accounting - Overview

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.

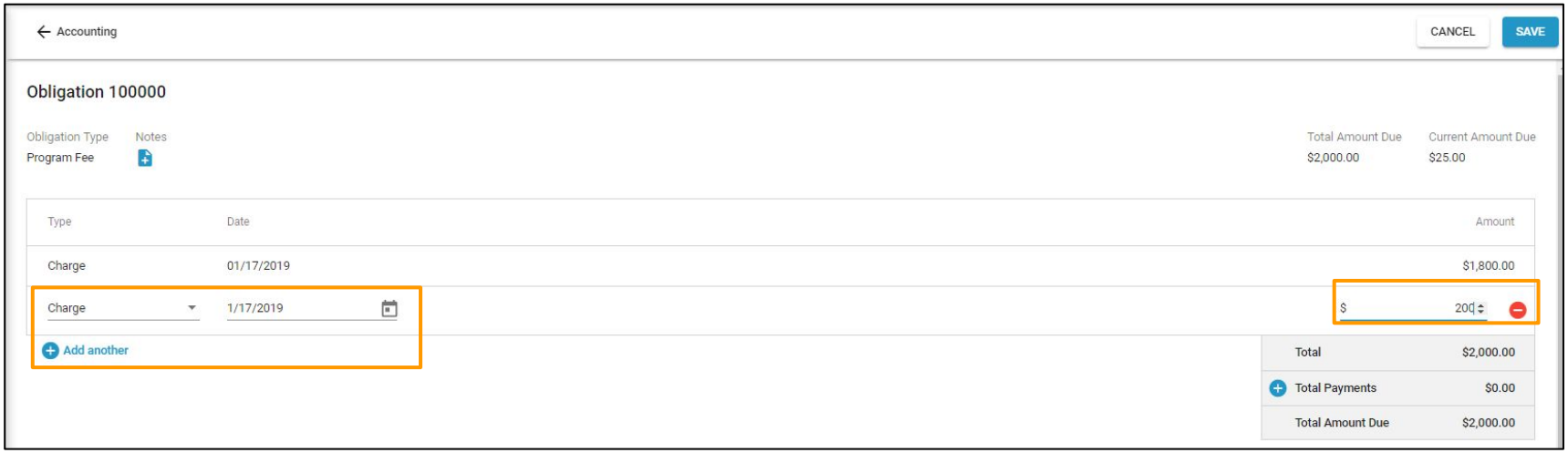
AutoMon Innovative Solutions for Community-Based Corrections | Accounting - Obligations

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



AutoMon Innovative Solutions for Community-Based Corrections | 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.

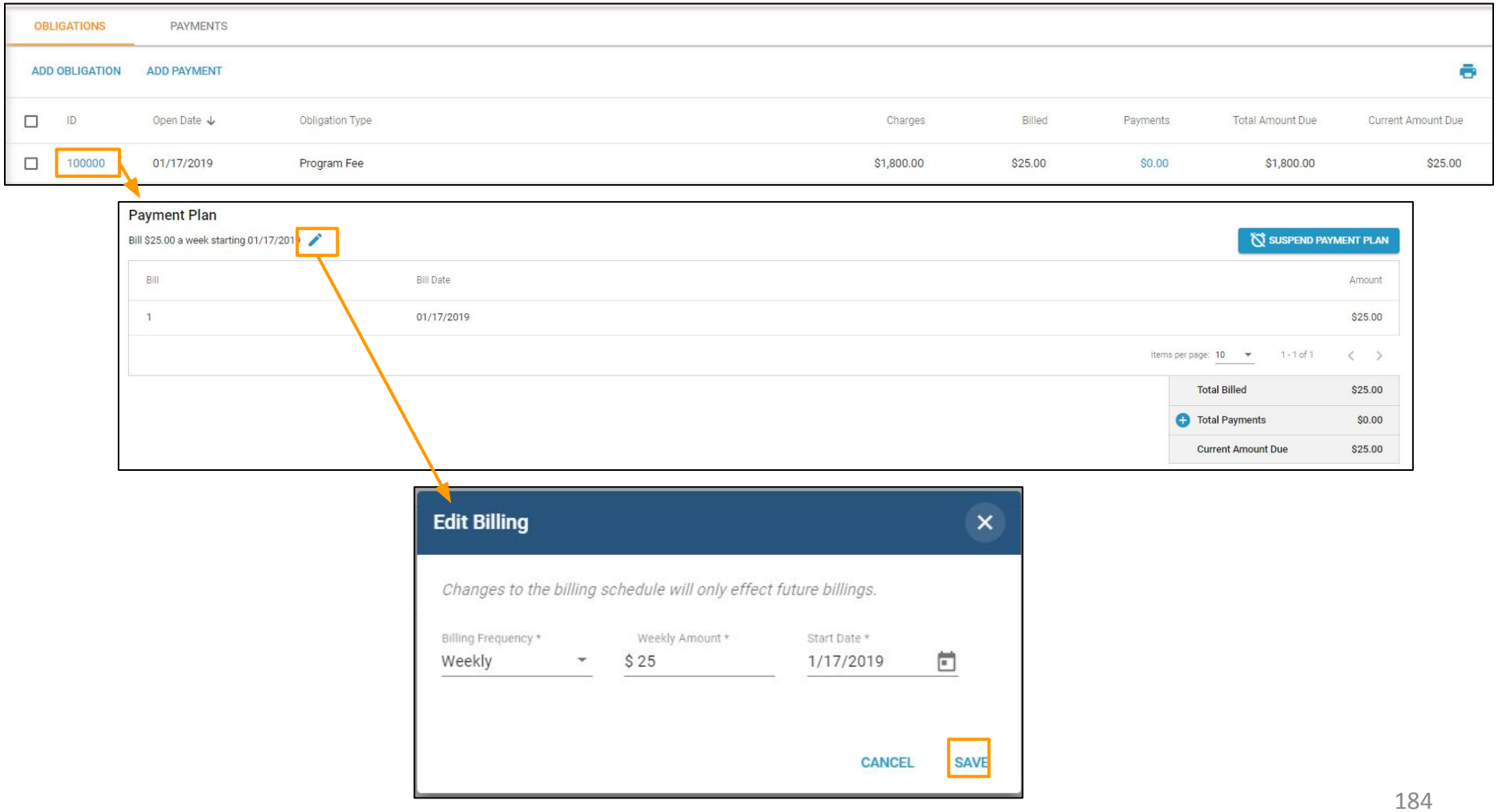


AutoMon Innovative Solutions for Community-Based Corrections | Accounting - Adding Credits

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.

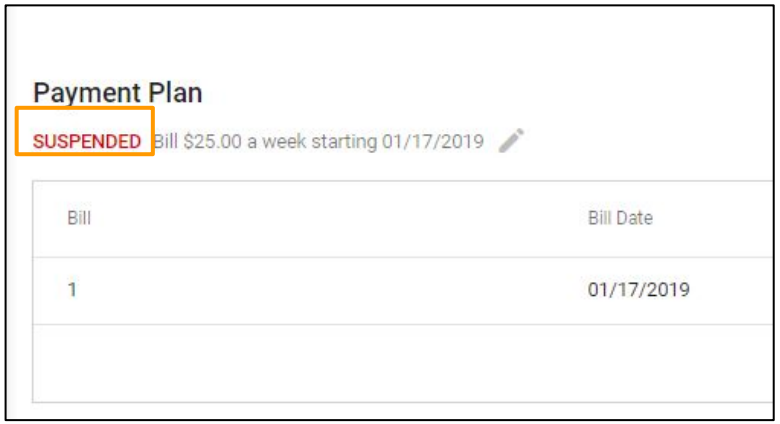
Accounting - Editing Payment Plan

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.



AutoMon Innovative Solutions for Community-Based Corrections | 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.



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.

Topic 21: Community Service

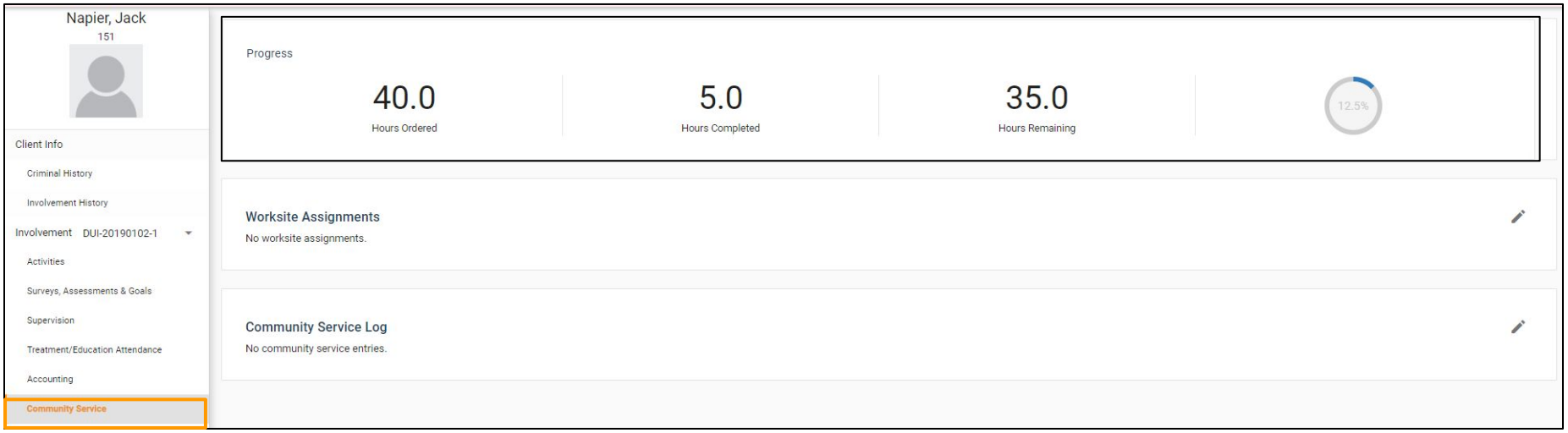
Back to Topics

Subtopics:

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

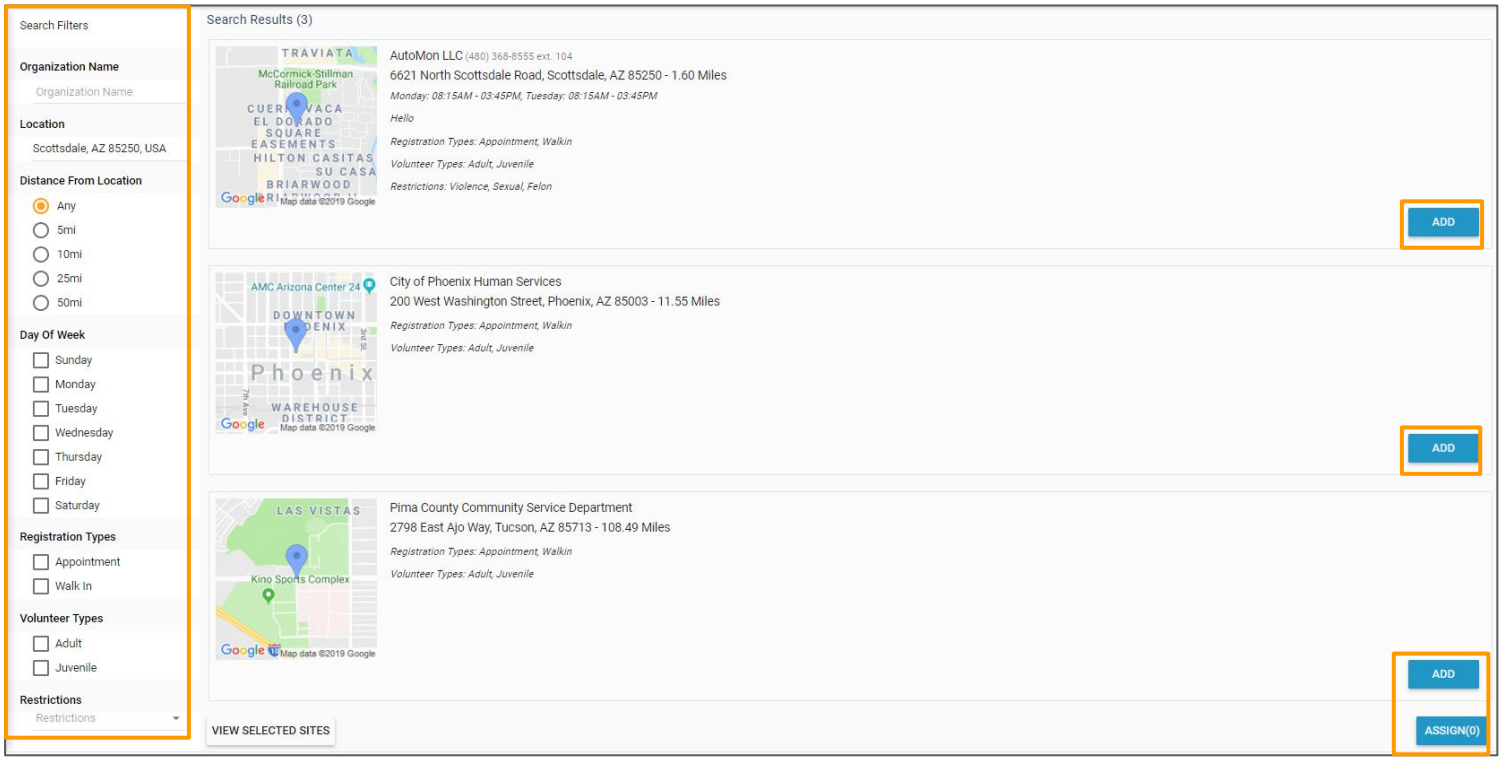
AutoMon Innovative Solutions for Community-Based Corrections | Community Service - Overview

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



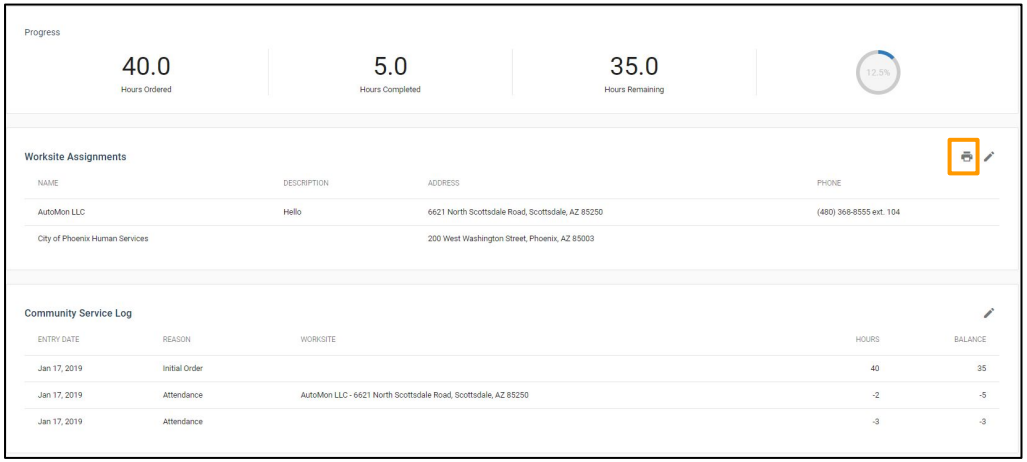
Community Service - Worksite Assignments

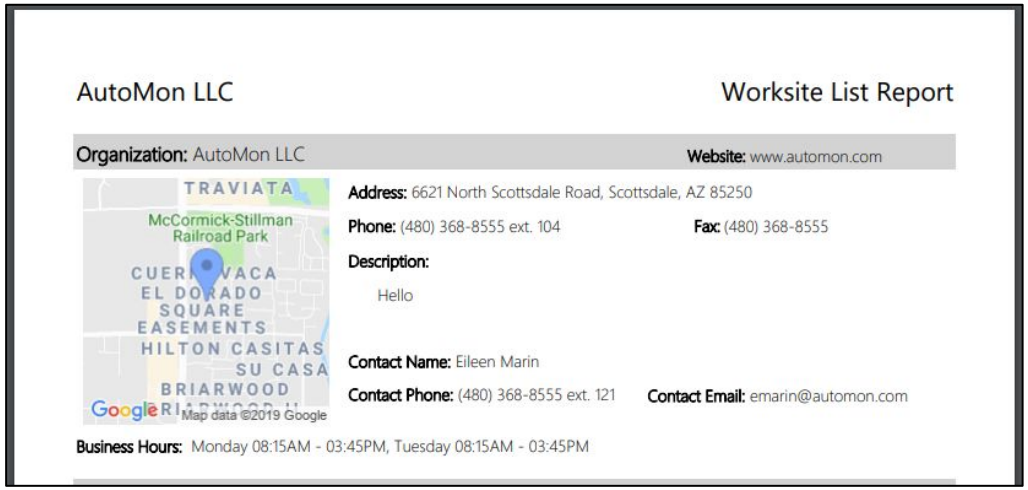
Users have the ability to assign specific Community Service Worksites where the Client can complete their Community Service requirement. Available worksites are entered into the System Admin setting. Users can click on the pen icon to assign Worksites. Users can select a number of filters to find appropriate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



Community Service - Worksite List Report

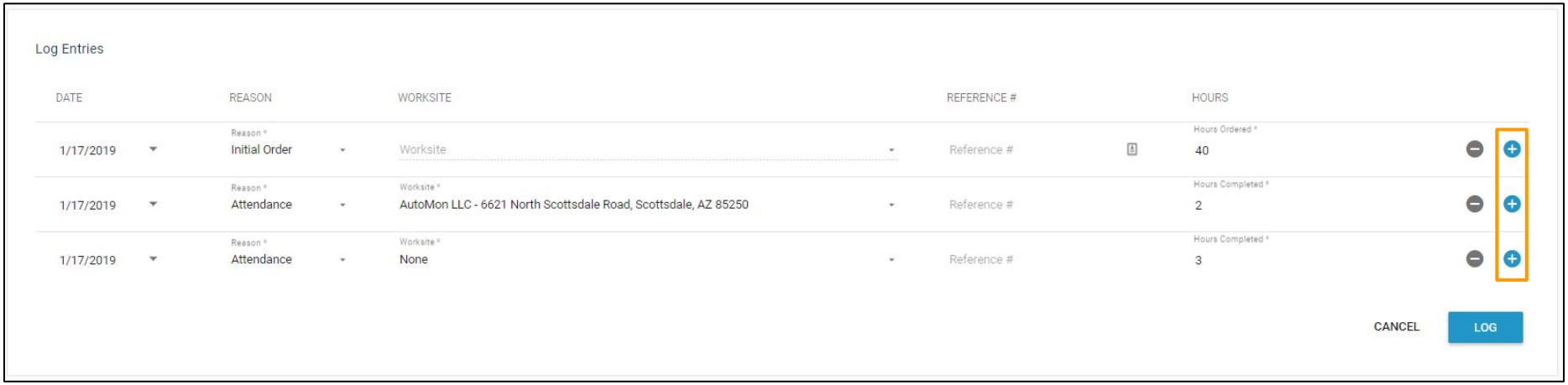
Users also have the ability to generate and print a Worksite Assignment report and provide it to the Client. The report contains details of the Worksites that will allow the Client to call and/or visit to schedule their Community Service hours.





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.



Topic 22: Notes

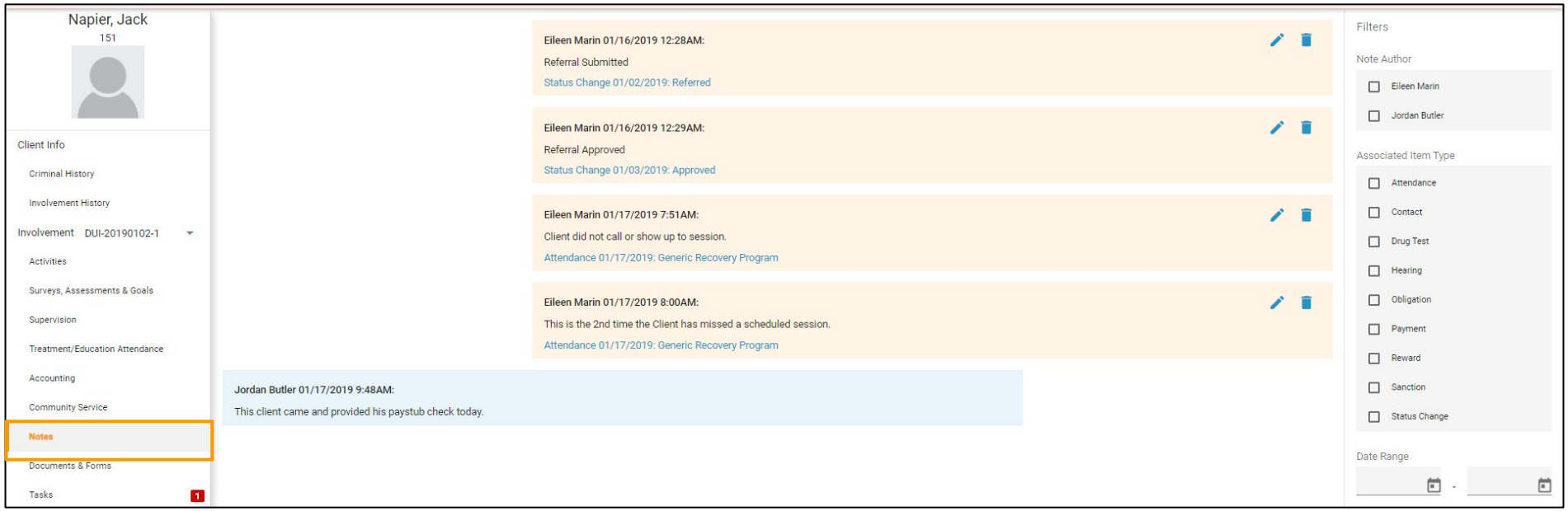
Back to Topics

Subtopics:

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

AutoMon | Notes - Overview

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.



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

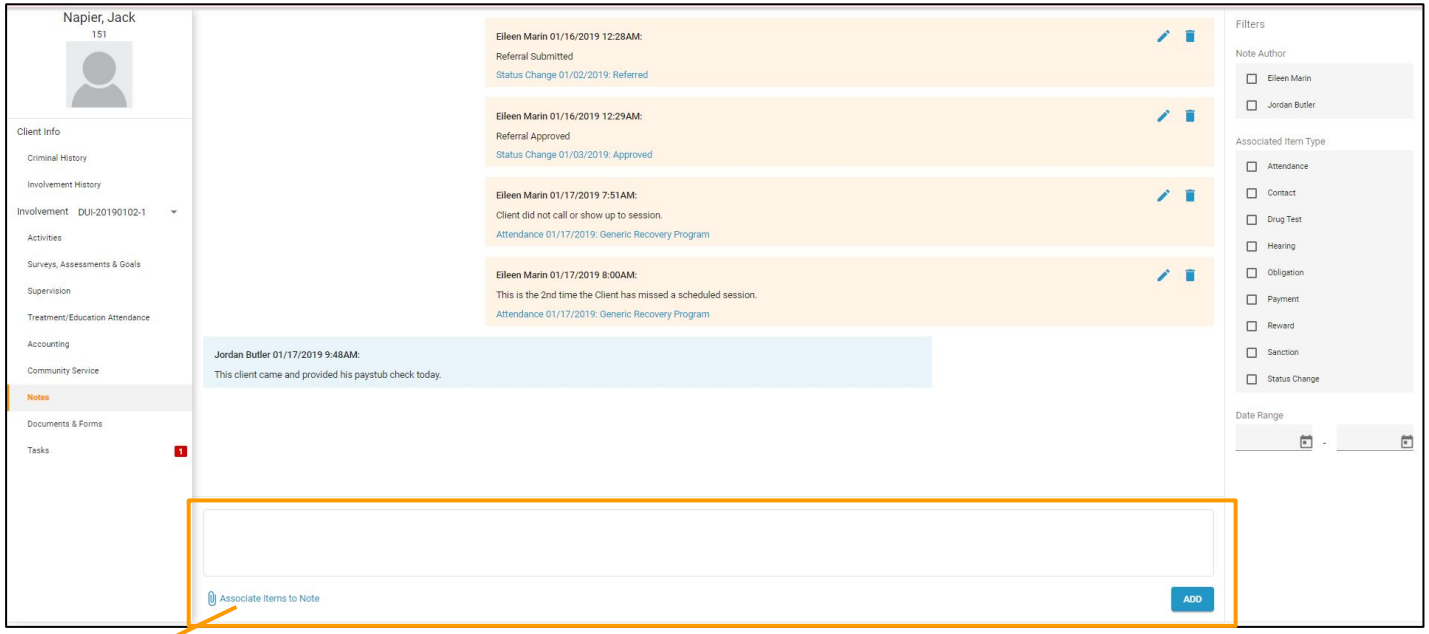
TREATMENT SESSION REQUIREMENTS | PROGRAM ENROLLMENT | TREATMENT ATTENDANCE

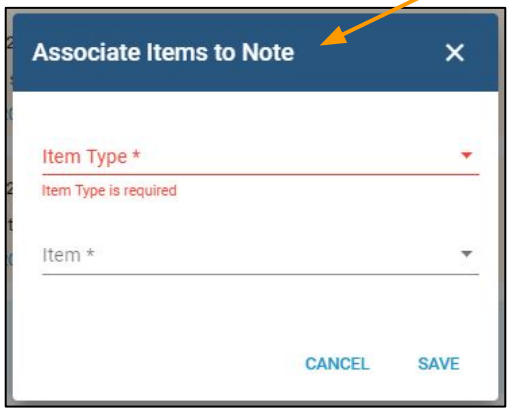
LOG ATTENDANCE

Date	Session Type	Program	Status	Session Length	Notes
1/17/2019 - 1/17/2019		Generic Recovery Program			
01/17/2019	Counseling	Generic Recovery Program	Completed	4 hours	
01/17/2019	Counseling	Generic Recovery Program	Completed	3 hours	
01/17/2019	Cognitive Behavioral Therapy	Generic Recovery Program	Missed	2 hours	(2)

Notes - Creating Notes

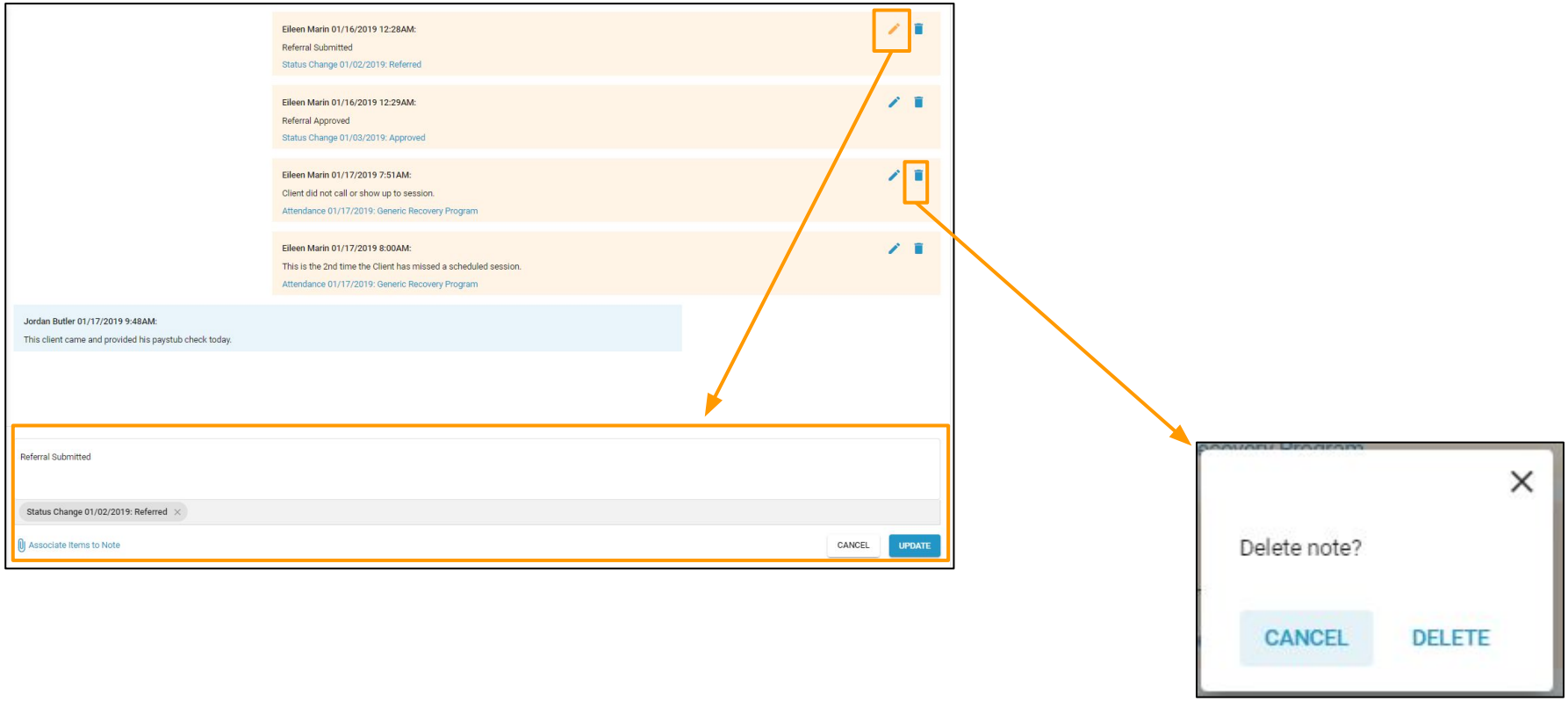
Users can create new Notes and, if applicable, associate the note to an item (drug test, contact, etc.). Users can type their note in the narrative box and then click the *Add* button. To associate the note to an item, click on the paperclip hyperlink.





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.



Topic 23: Documents & Forms

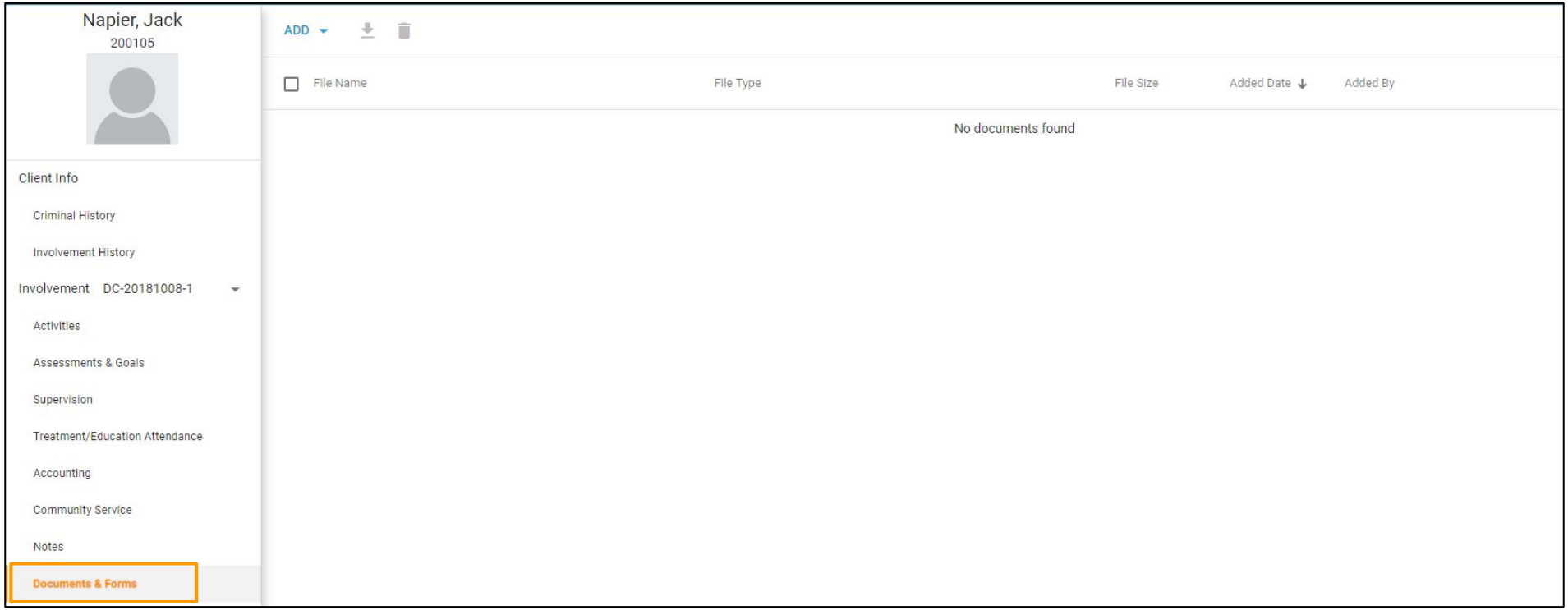
Back to Topics

Subtopics:

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

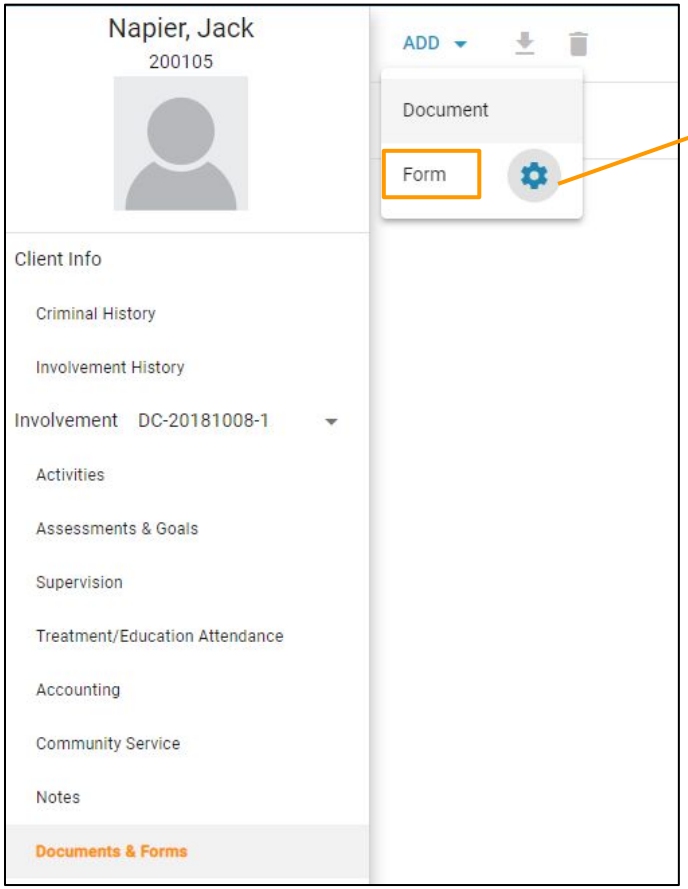
AutoMon | Documents & Forms - Overview

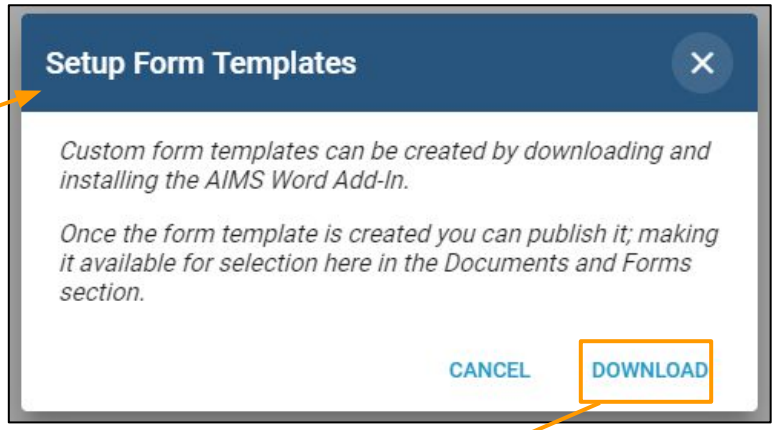
Users have the ability to upload documents and/or create and generate Microsoft Word templates. Templates are created to allow the system to populate data through the use of Word tags. In this section will review uploading documents, installing the Word Add-In and creating templates.



AutoMon Innovative Solutions for Community-Based Corrections | 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.

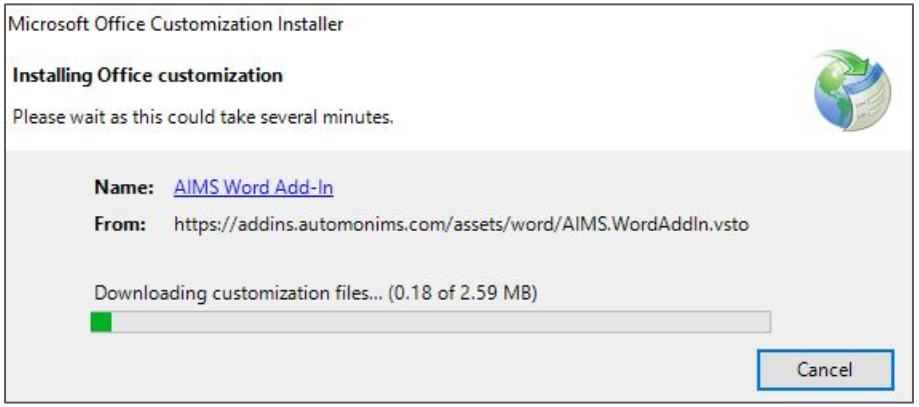


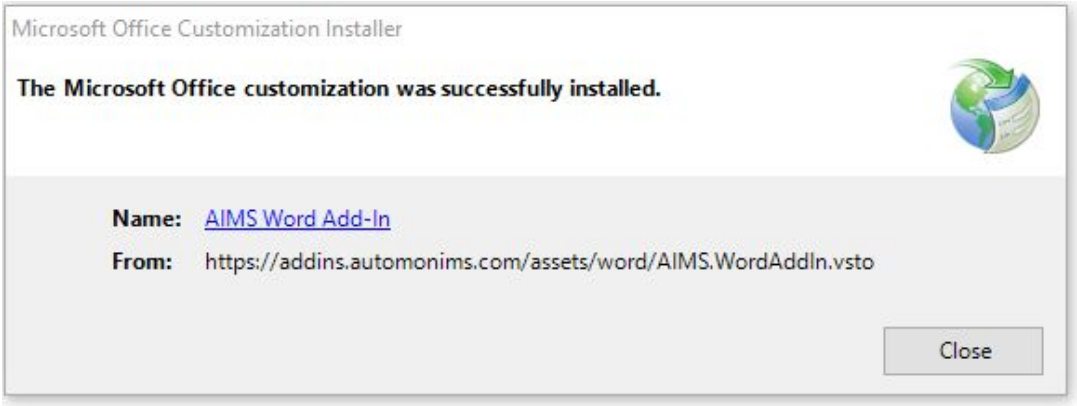


**** Users will need to have a role of Template Designer in order to <u>create</u> Word Templates.***

Documents & Forms - Word Add-In

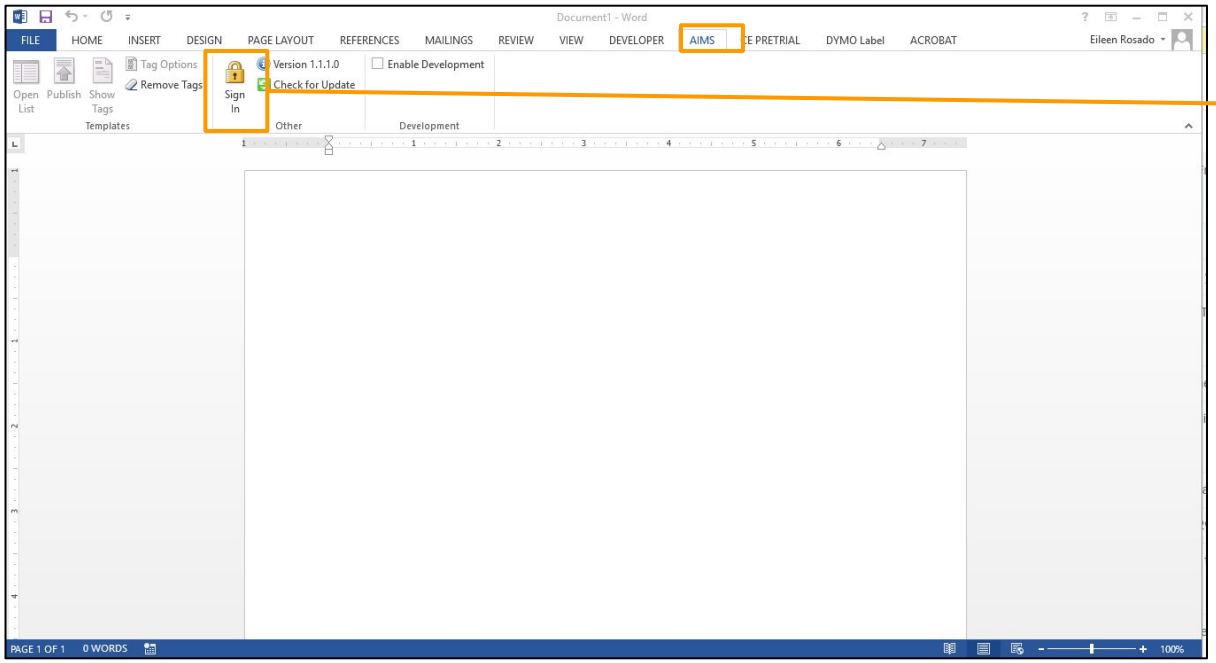
Click on the setup.exe to run the Word Add-In installation. The installer will indicate once it has been finished.

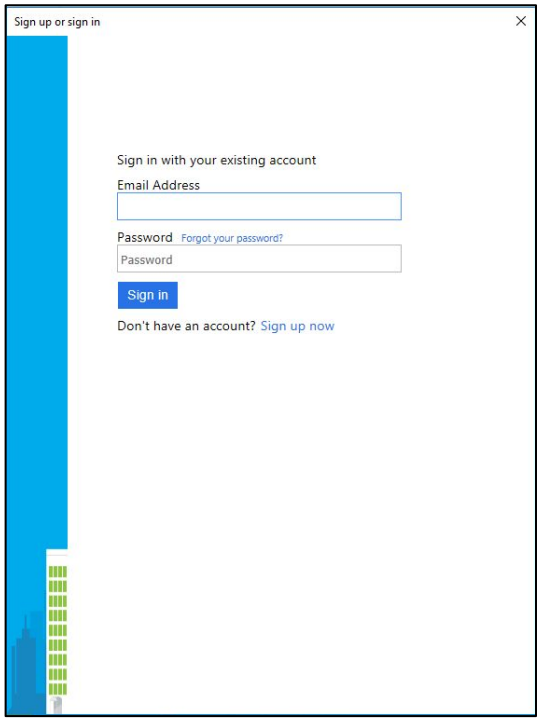




Documents & Forms - Managing Templates

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.



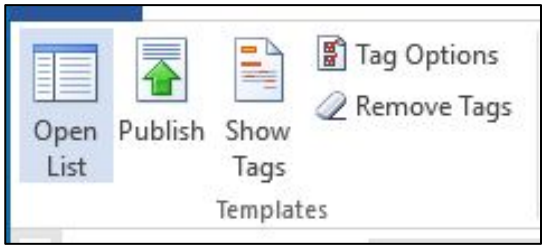


Documents & Forms - Managing Templates

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.

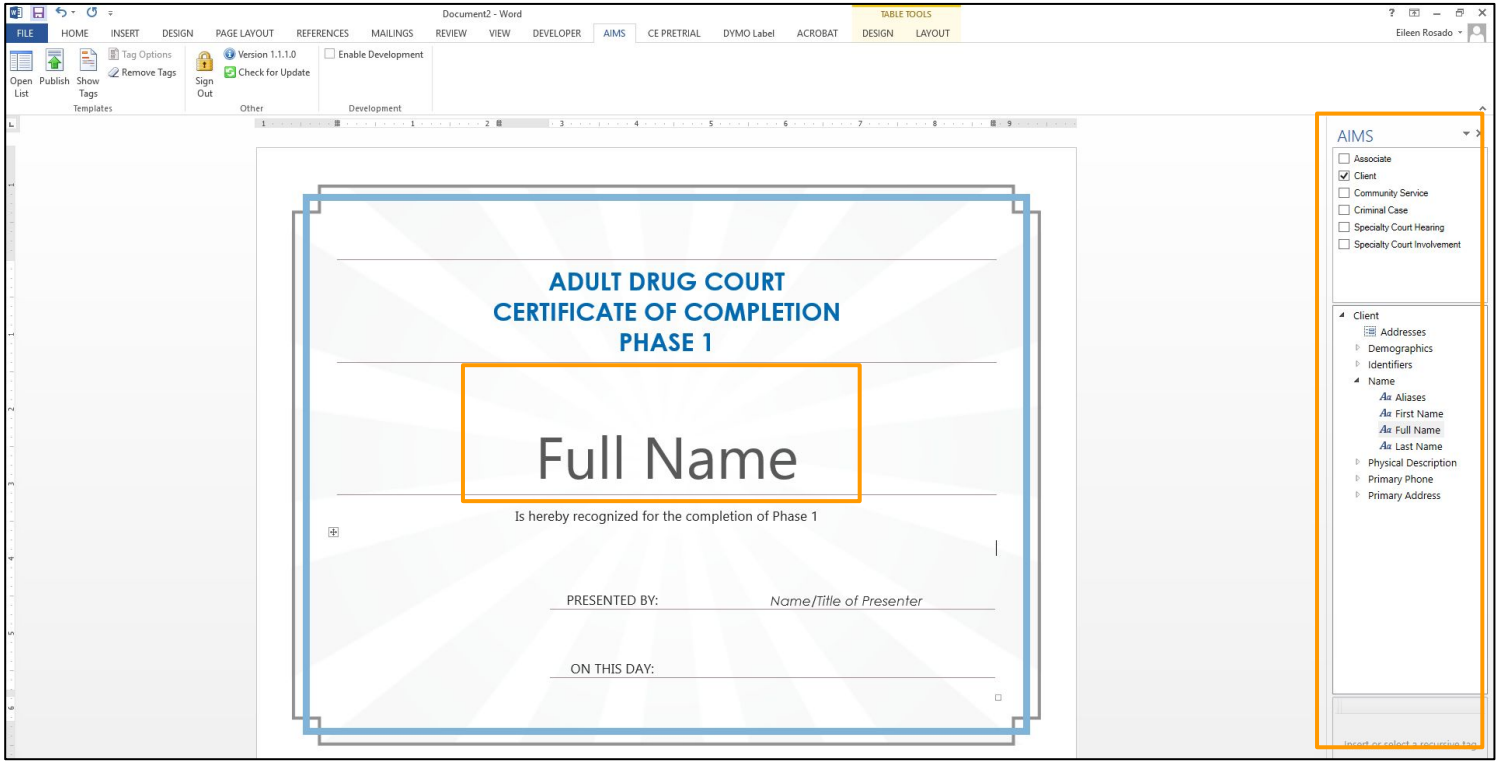
To the left of the Sign out option, Users can perform the following actions:

- **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.



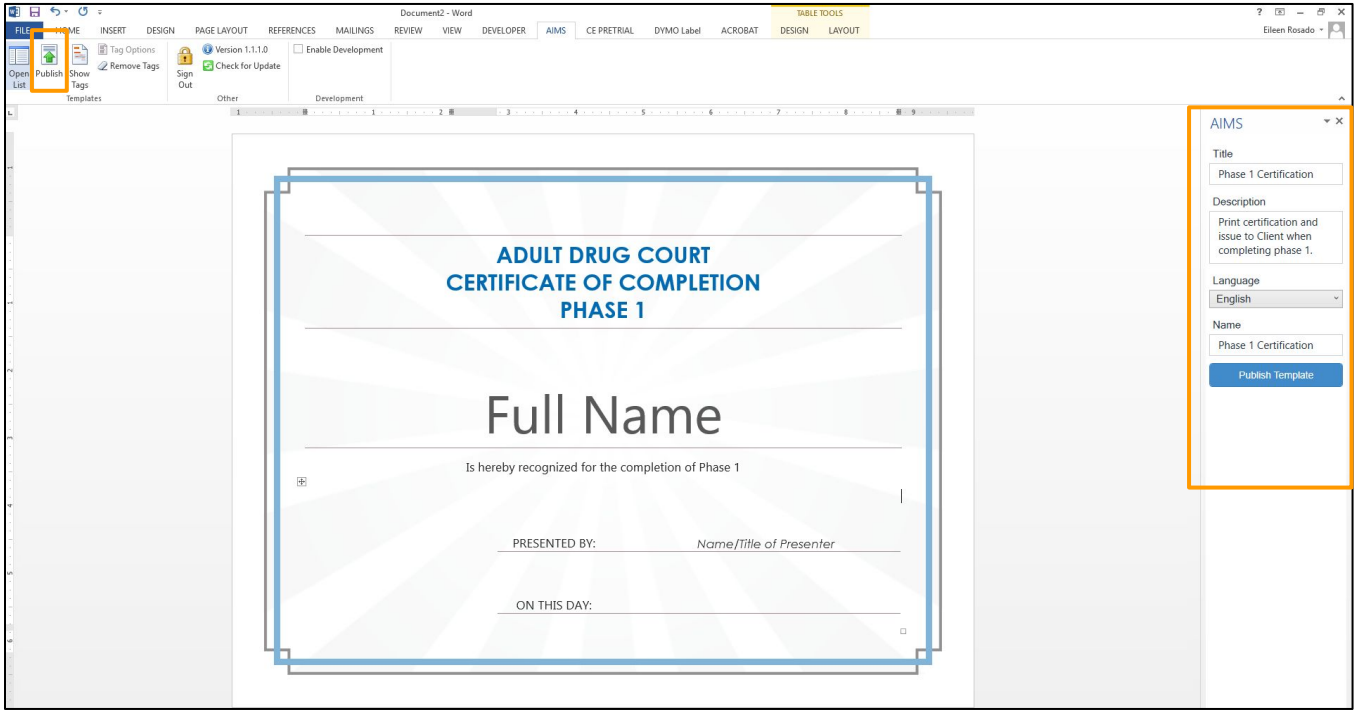
Documents & Forms - Managing Templates

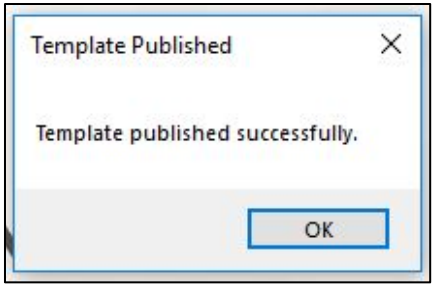
To begin creating a new template, click on the *Show Tags* option. The right panel will display the available tags. Best practice is to write up the template first, then add the required Word tags. Keep in mind how the template should be formatted - logos, headers, etc. You can make use of standard MS 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

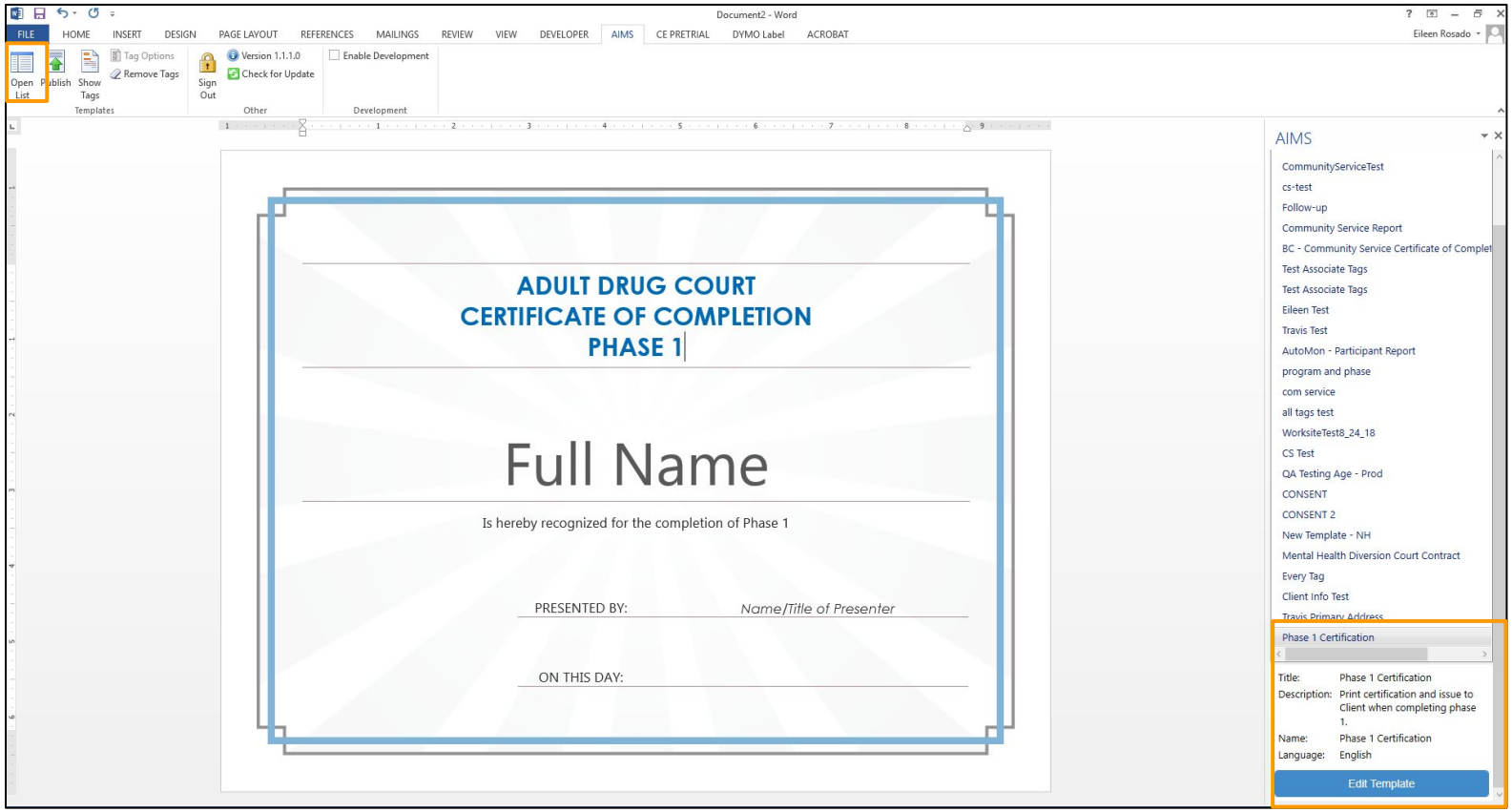
Once all desired tags have been added into the document template, click on the *Publish* icon. You will then be required to enter a template title, description, language (*note this will not translate the template but allows you file all templates under the appropriate language), and Template name. Click 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.





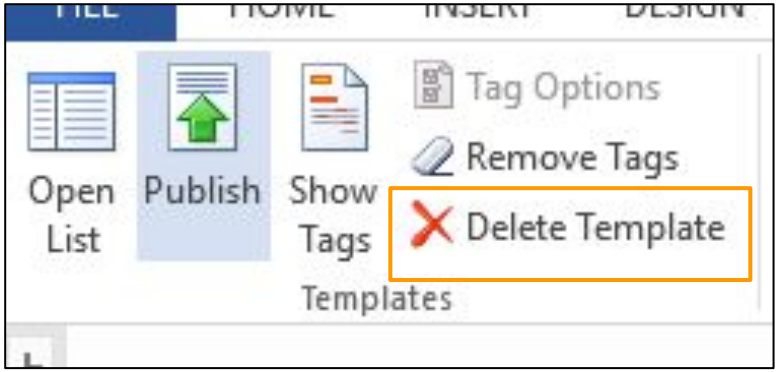
Documents & Forms - Managing Templates

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



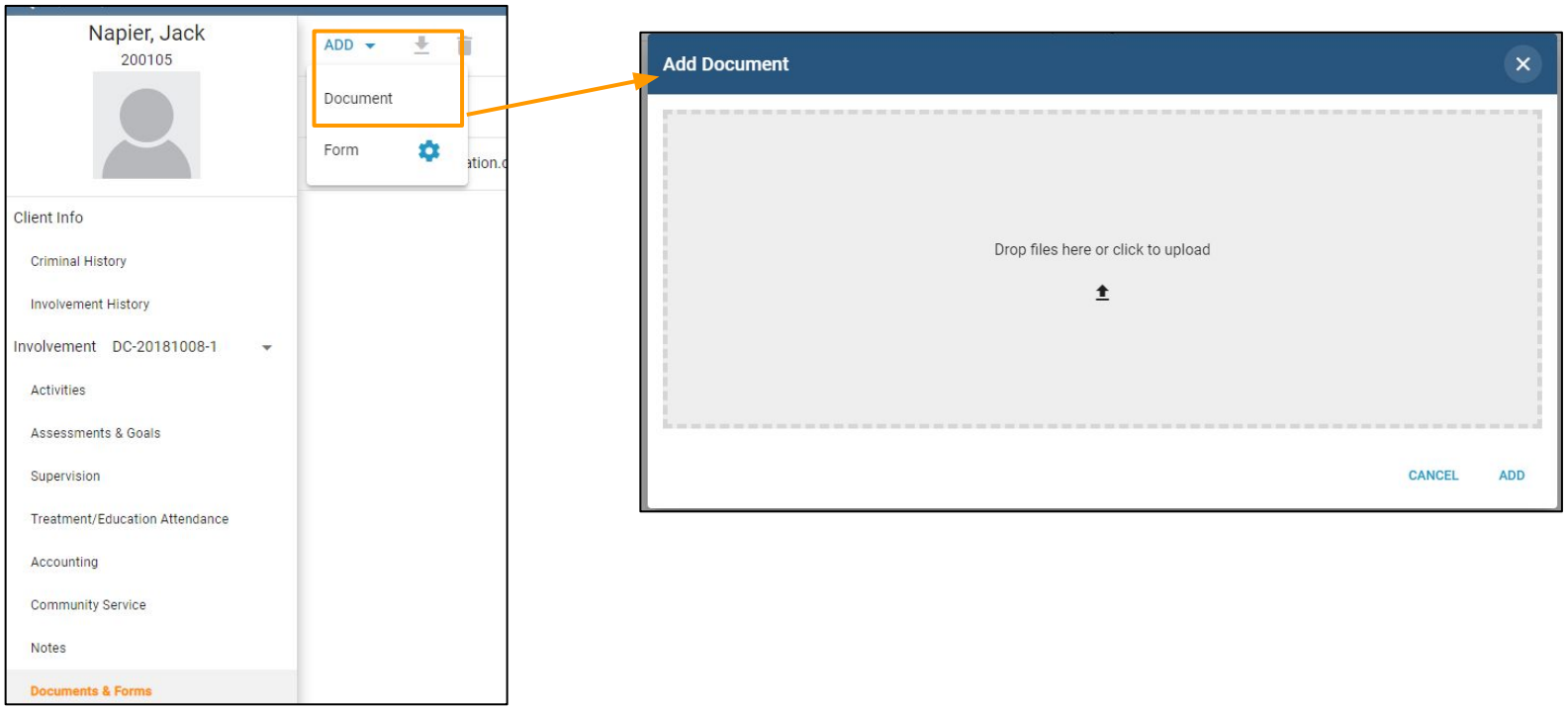
Documents & Forms - Managing Templates

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



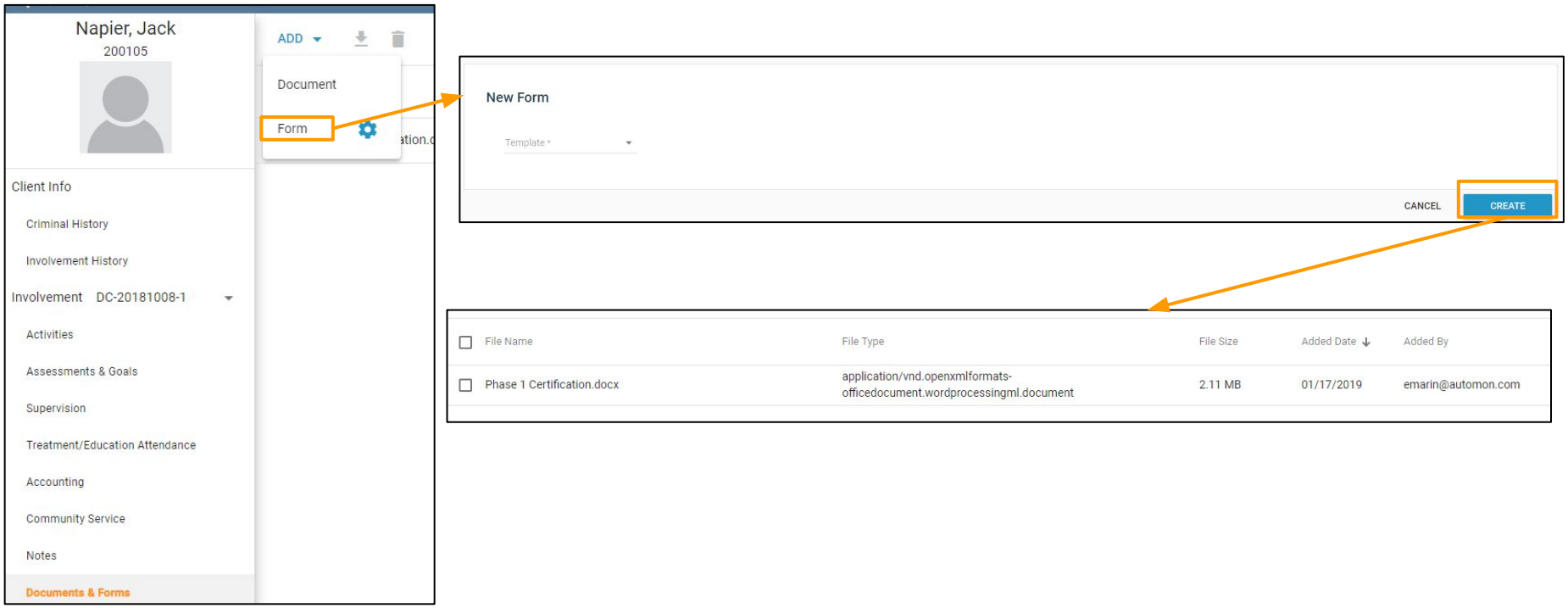
Documents & Forms - Adding Documents

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



Documents & Forms - Generating Forms

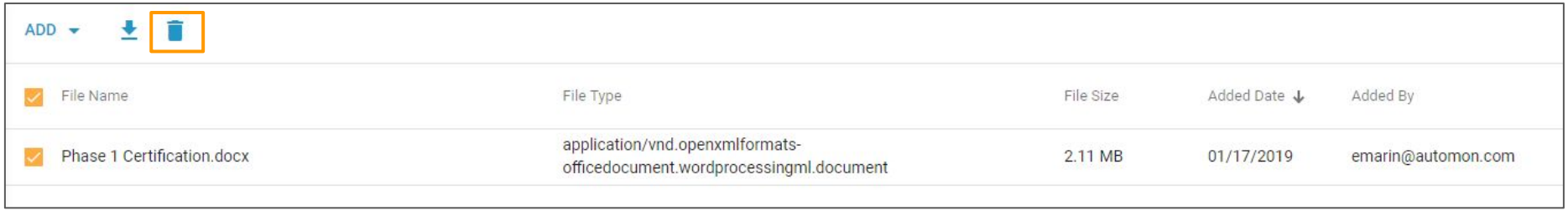
To generate a Form, click on the *Add* button, then select *Form*. Select the template from the template list and click on the *Create* button. The form will generate the Word template. Users can add additional text, if applicable, to the form. The additional text would be specific to the Client and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



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.

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.



Topic 24: Tasks

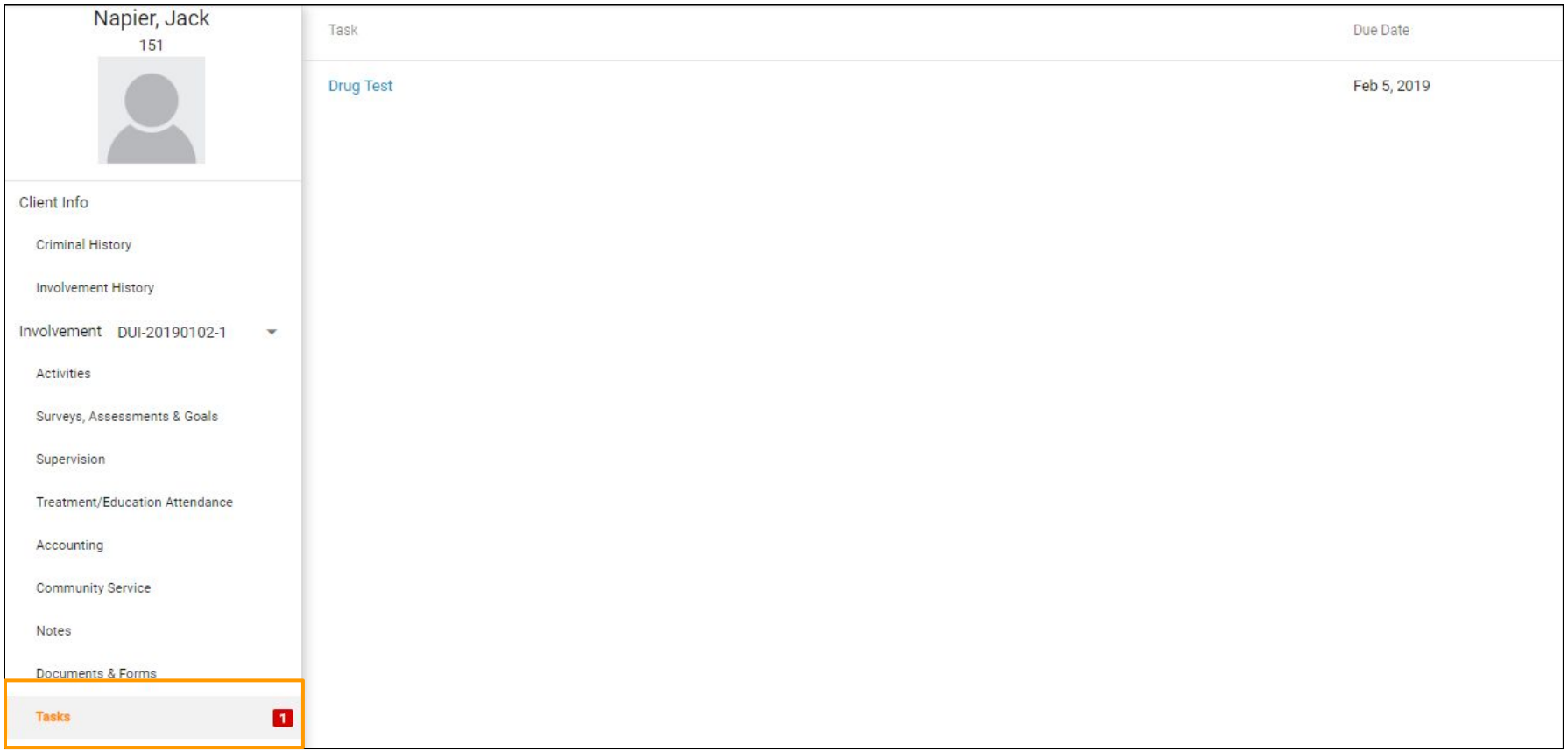
Back to Topics

Subtopics:

1. Overview
2. Completing Tasks

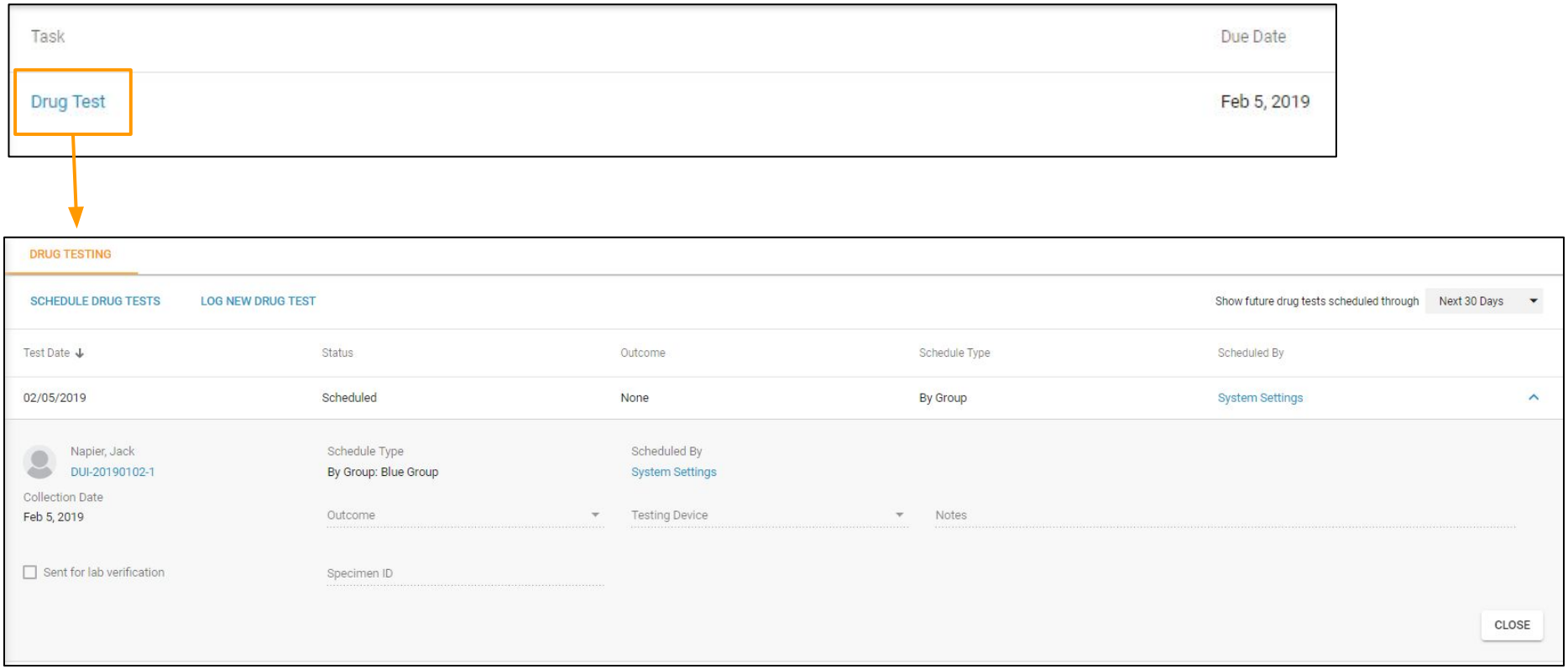
Tasks - Overview

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



Tasks - Completing a Task

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



Topic 25: Referrals & Intakes

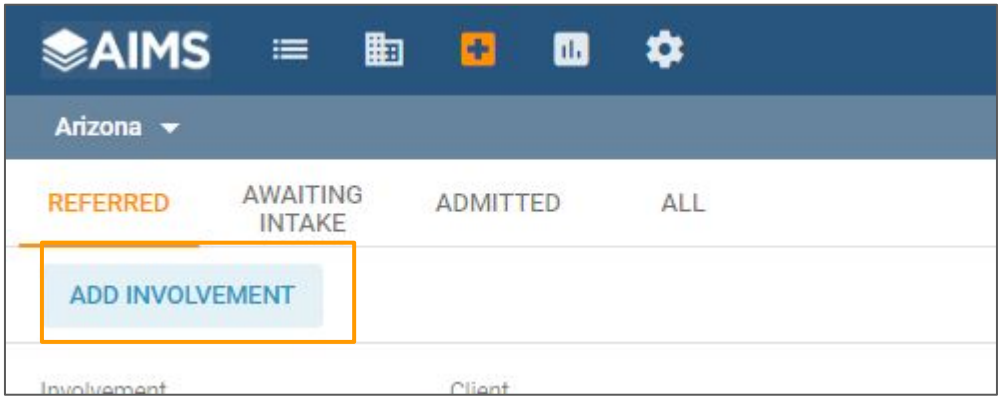
Back to Topics

Subtopics:

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

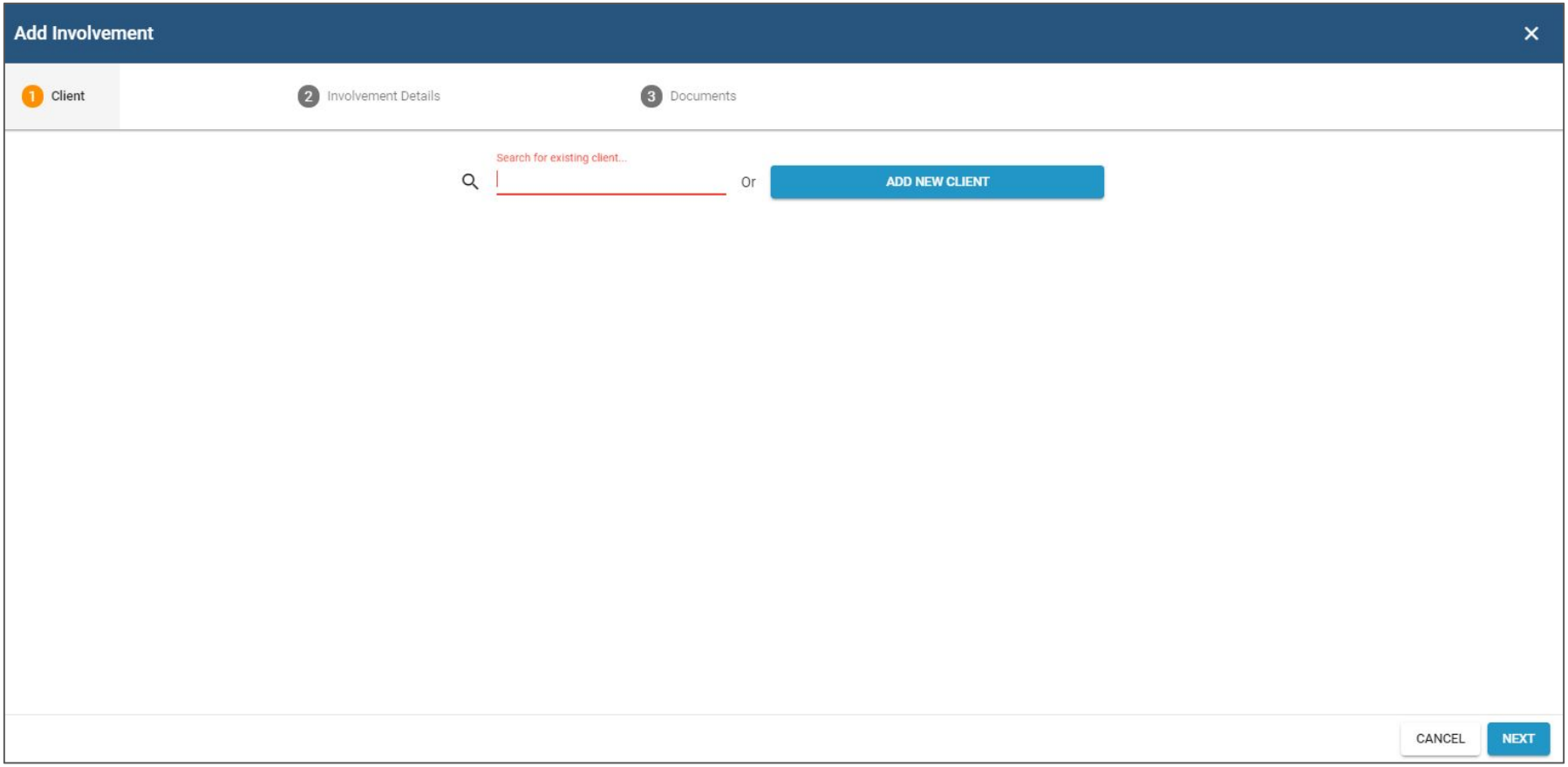
Referrals - New Referral

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.



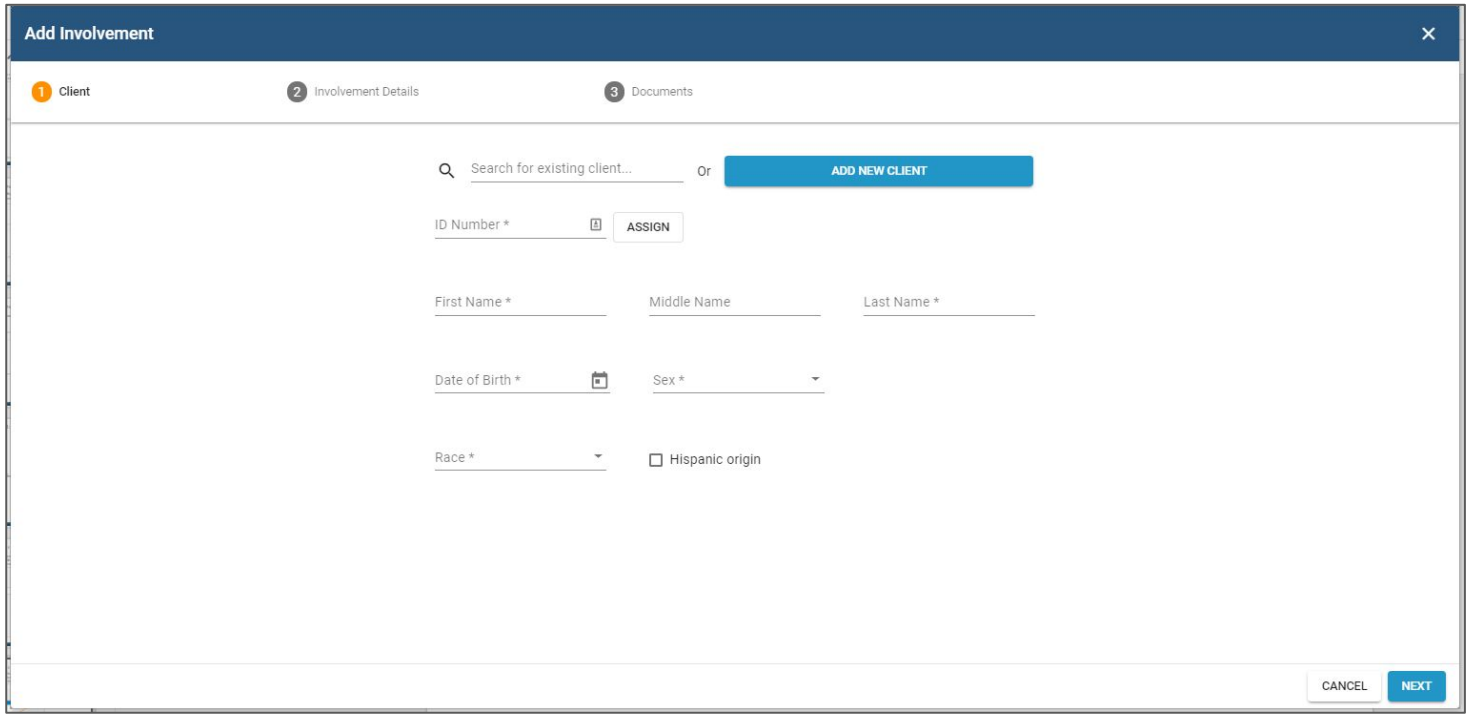
Referrals - New Referral

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.



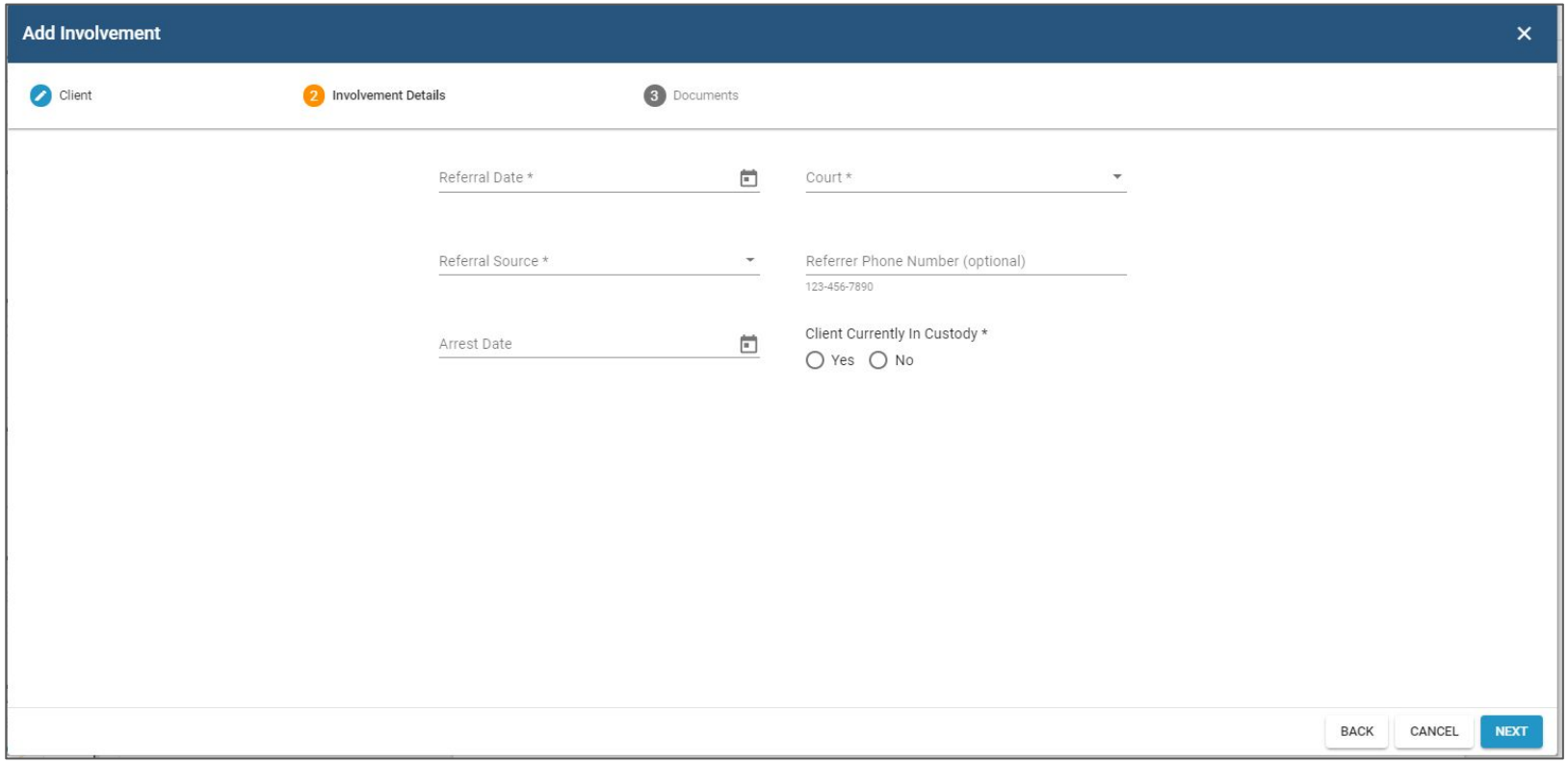
Referrals - New Referral

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.



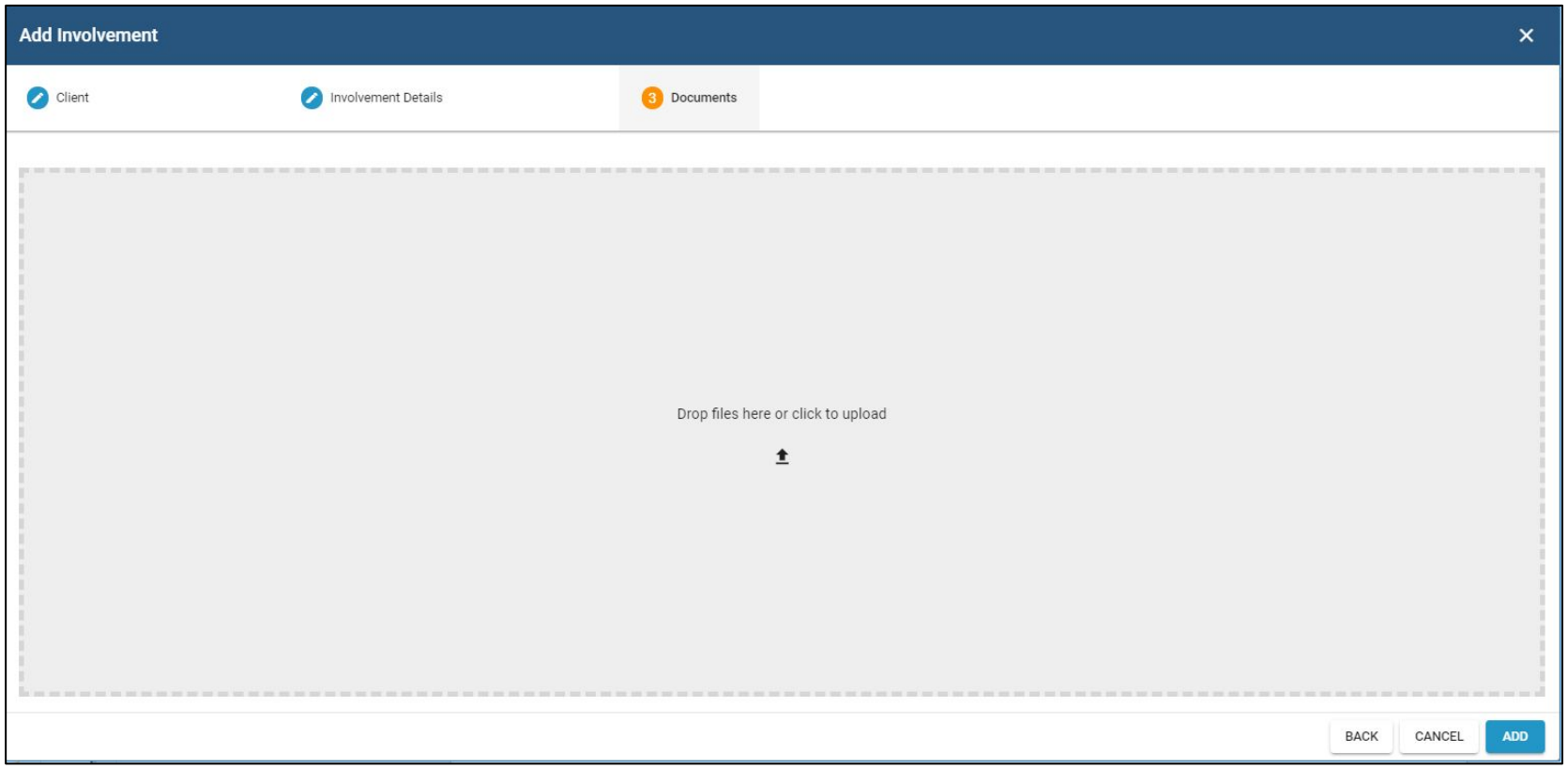
Referrals - New Referral

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.



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 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.



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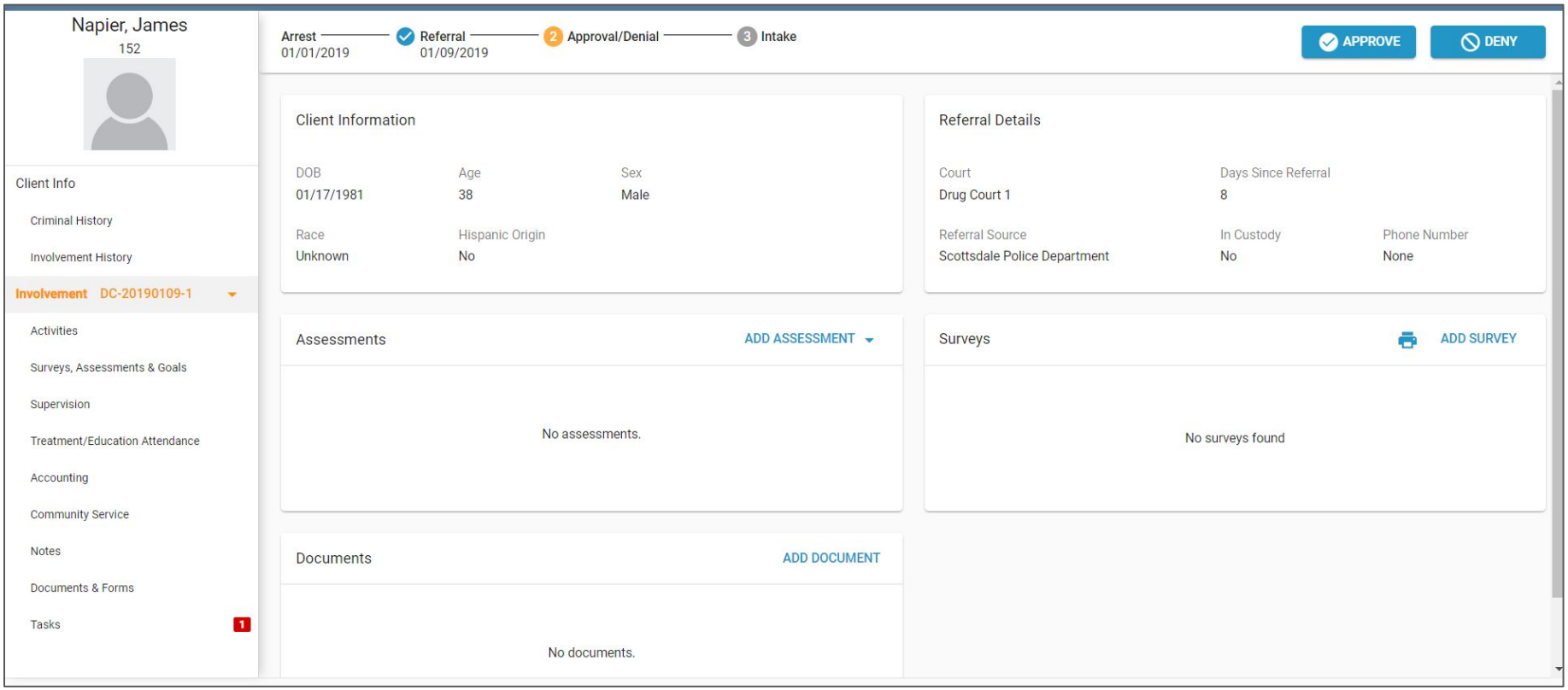
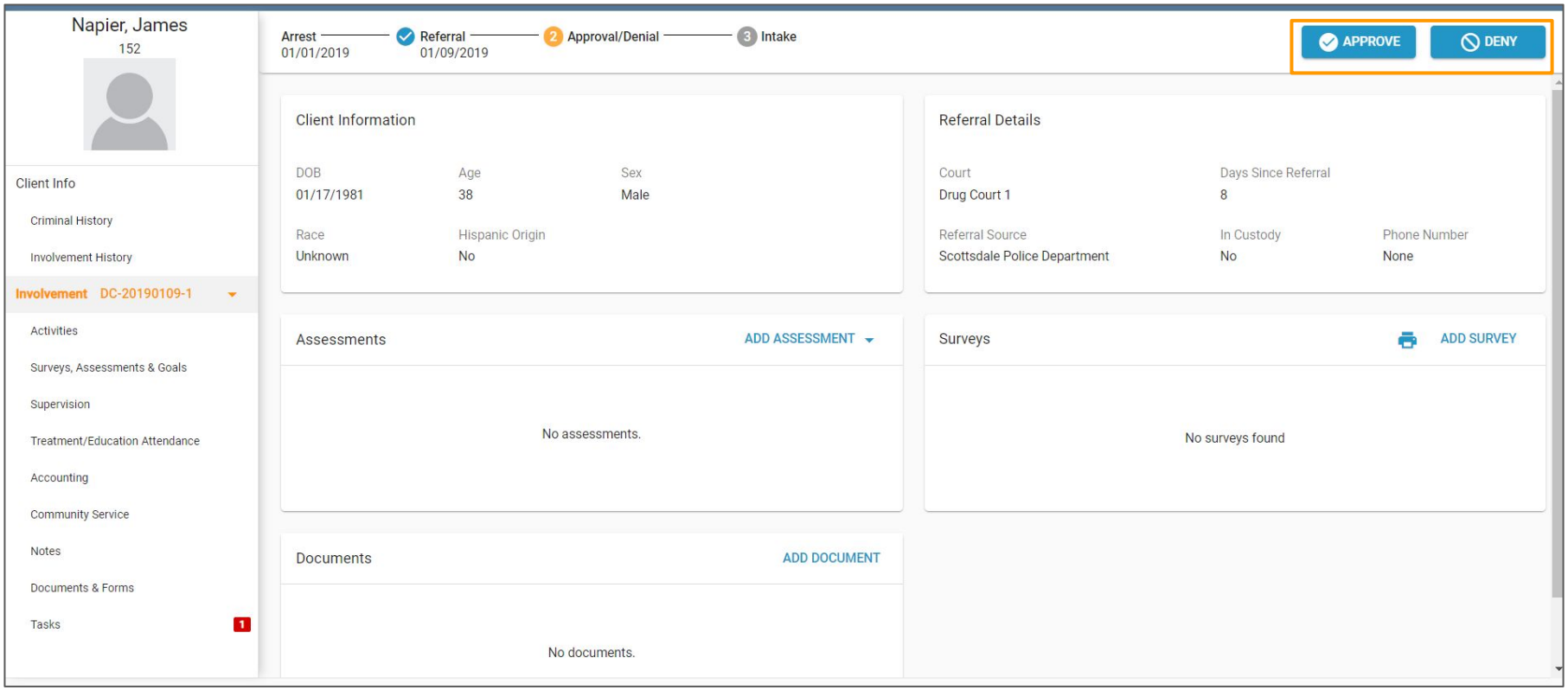
Referrals - Involvement Referral View

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.



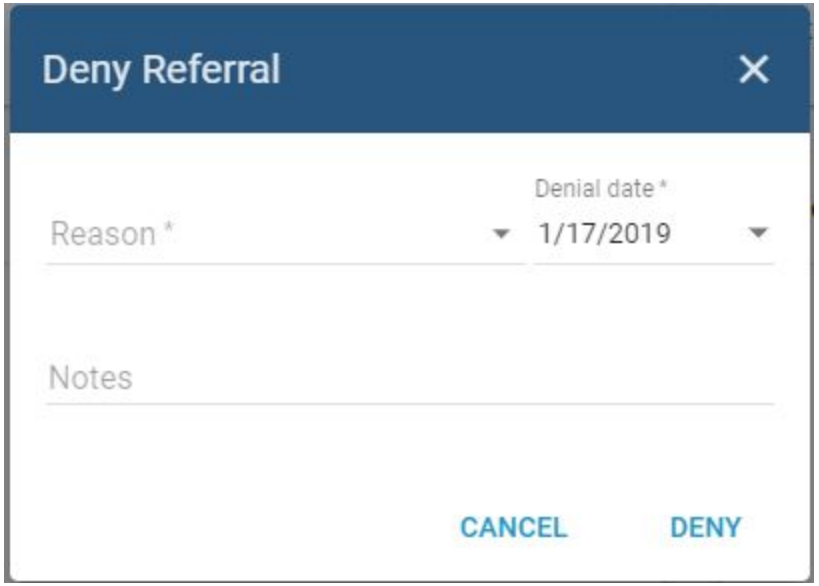
Referrals - Involvement Referral View

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.



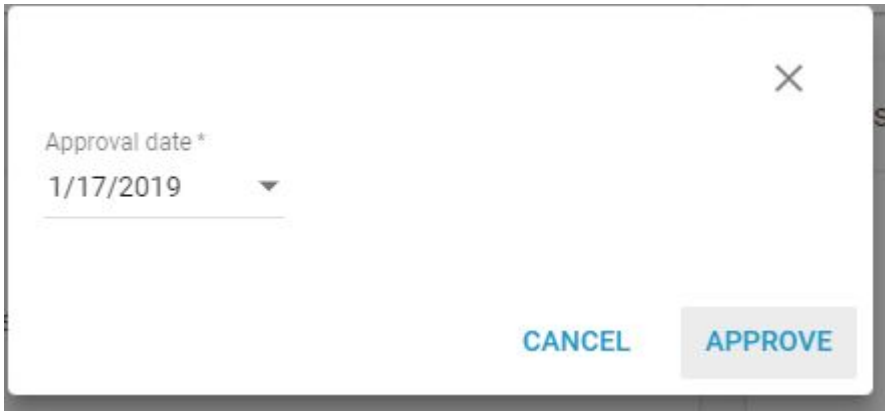
Referrals - Denying Referrals

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.



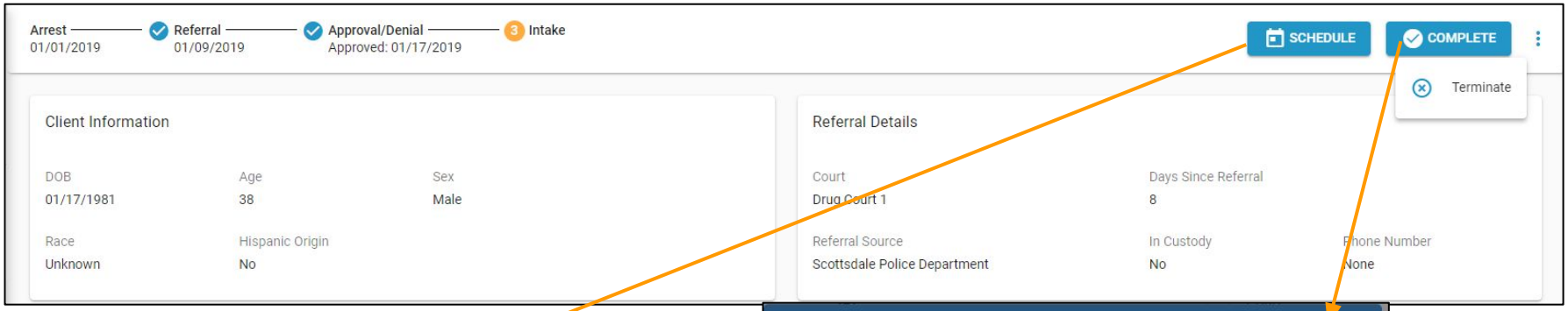
Referrals - Approving Referrals

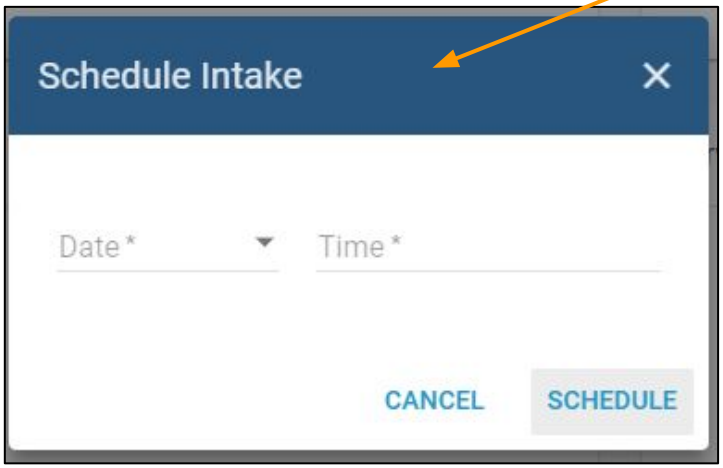
When the referral is being approved, the User is prompted to enter an approval date (must be after the referral date). Once the Client has been approved, the User will complete the intake steps next.

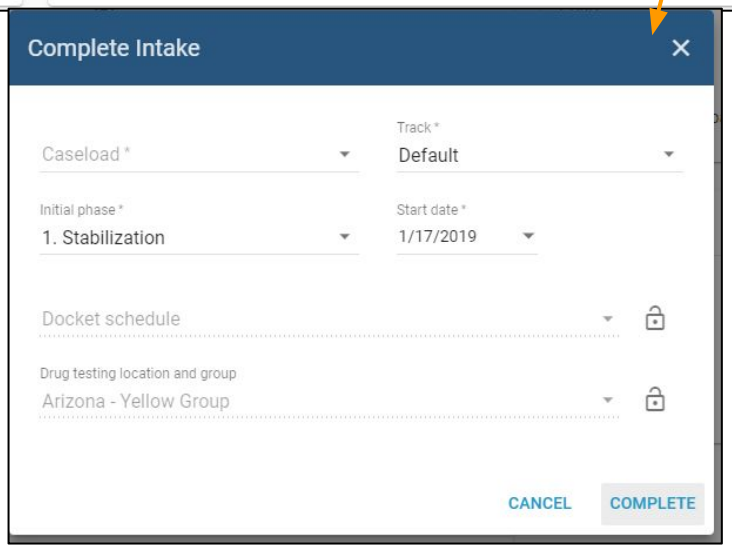


Referrals - Completing Intakes

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.







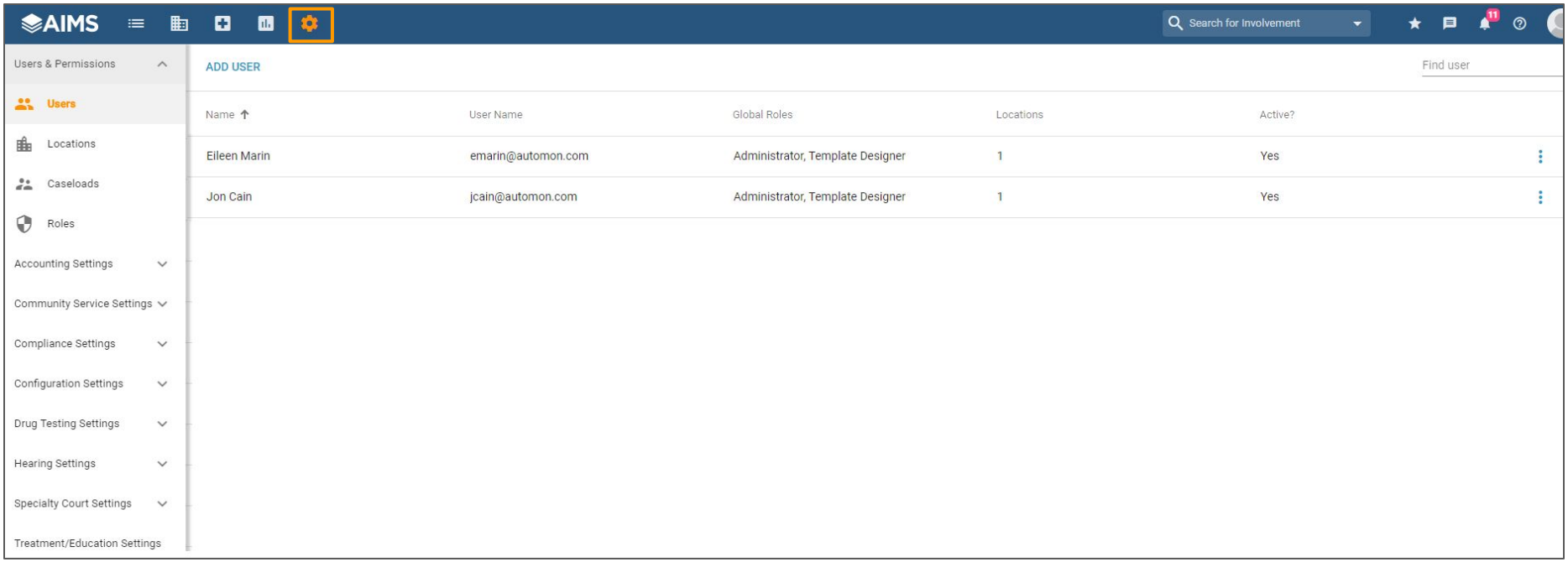
Topic 26: Administration

Back to Topics

Subtopics:

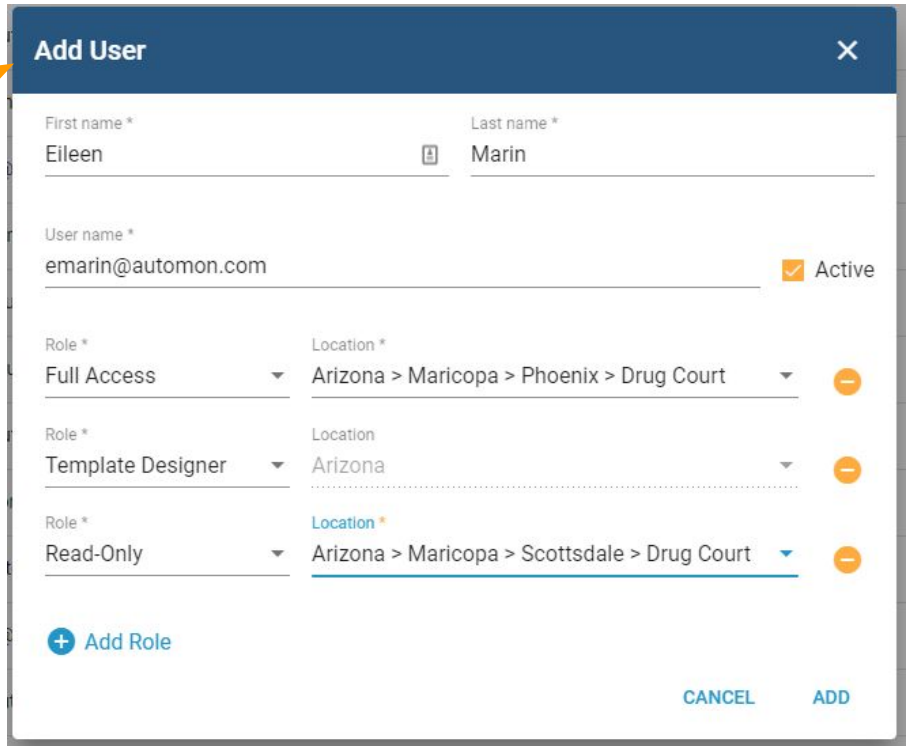
AutoMon | Administration - Overview

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.



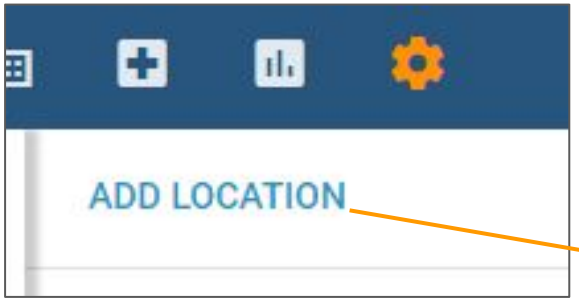
Administration - Users & Permissions

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.



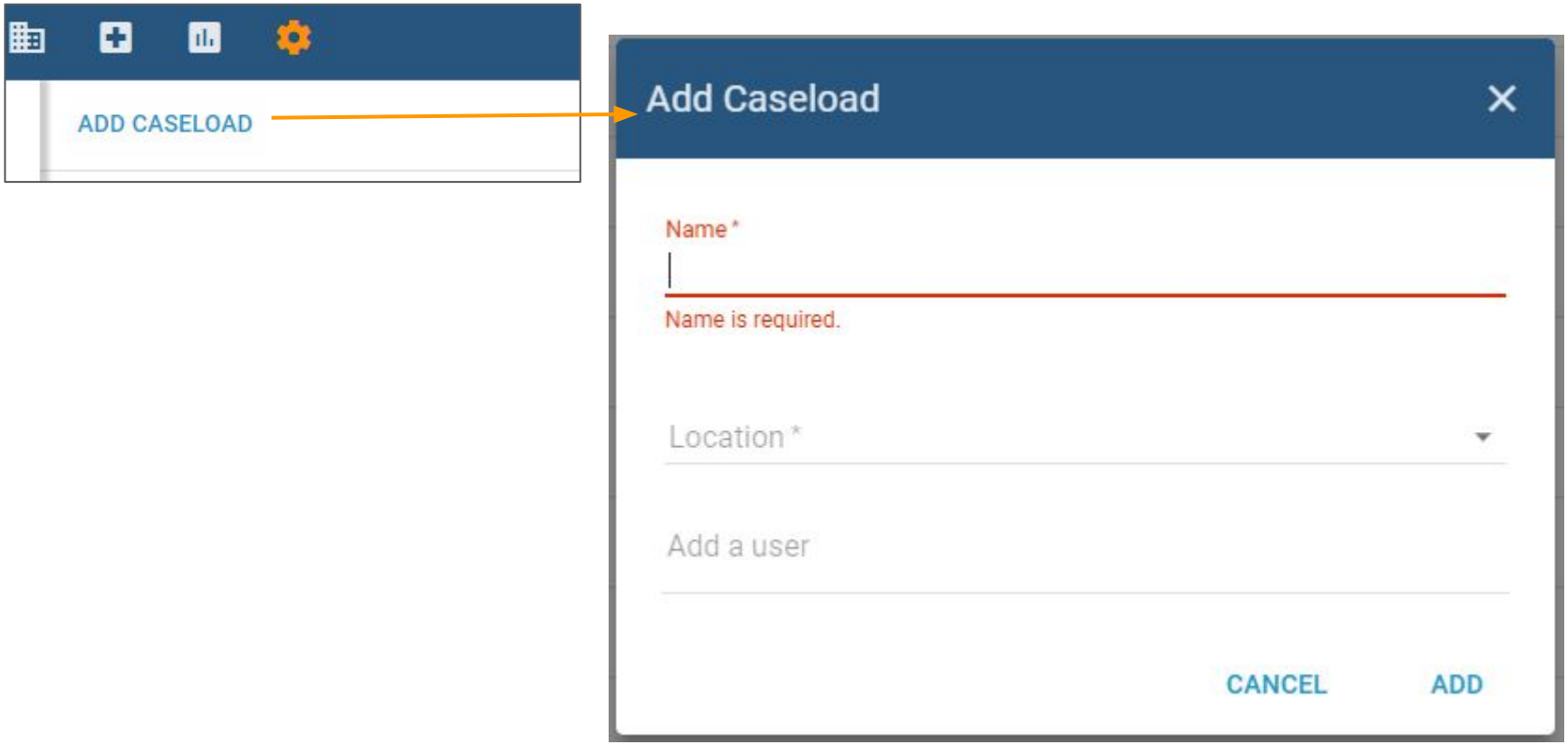
Administration - Users & Permissions

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.



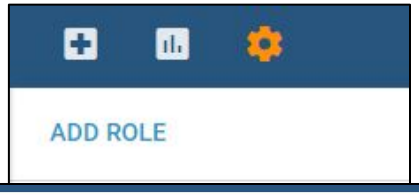
Administration - Users & Permissions

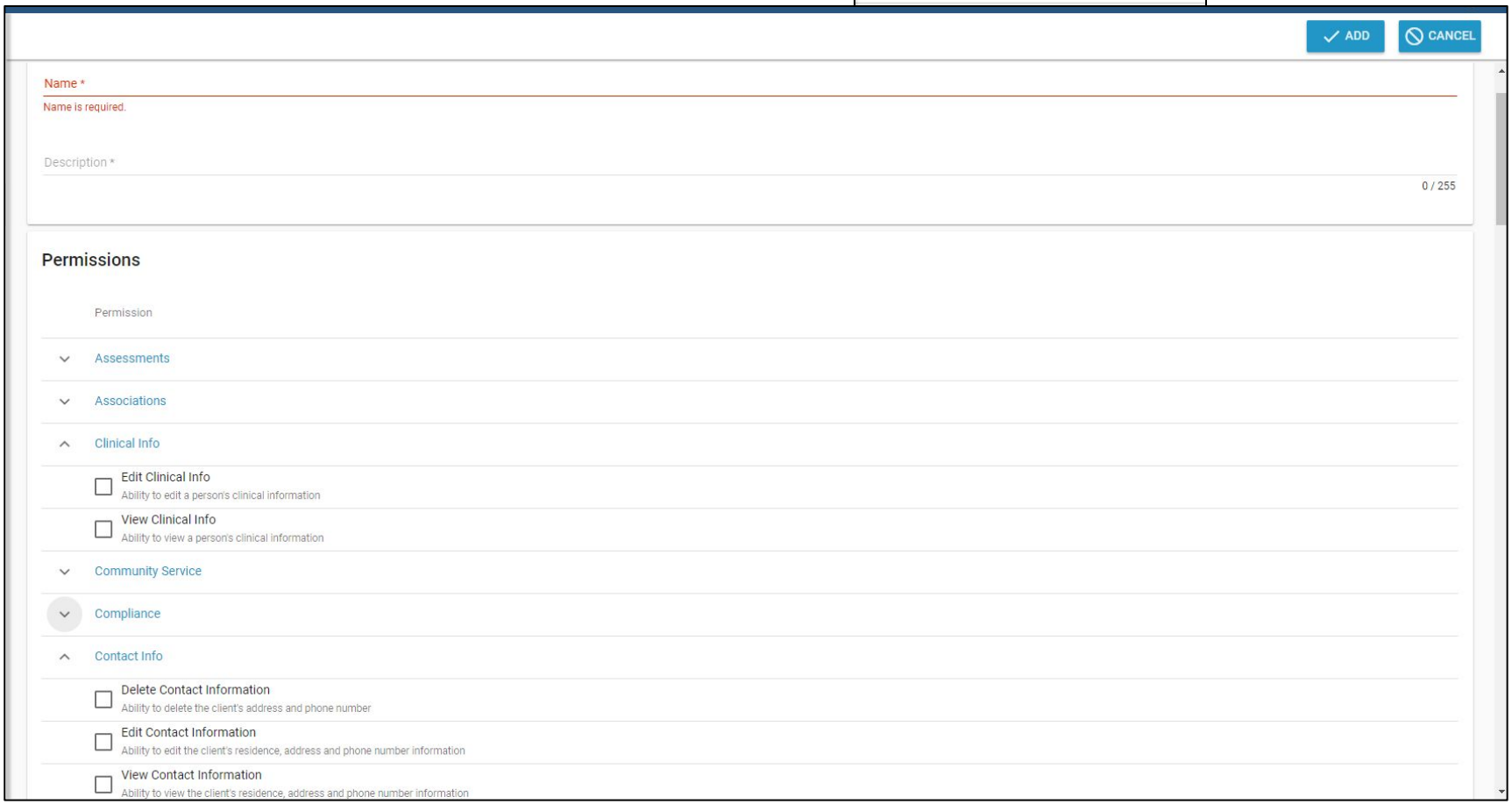
Caseloads in AIMS is a grouping of Users at a specific location in which the Client's involvement will be assigned to. Therefore, a case management team would have a Caseload and each User of that team would be assigned to that Caseload.



AutoMon | Administration - Users & Permissions

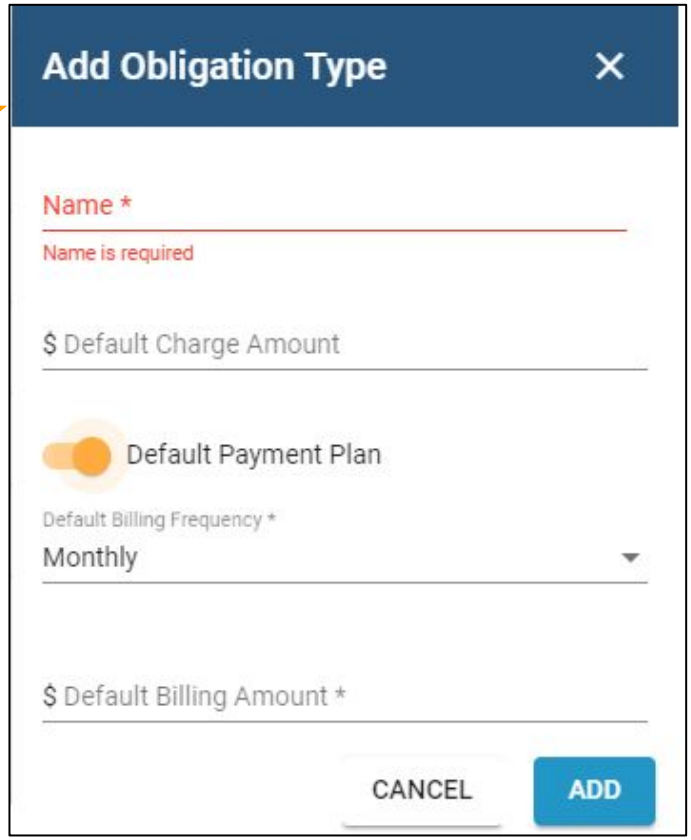
Permissions are defined with the Role function. Admins can create specific roles and within those roles, permissions are specified.





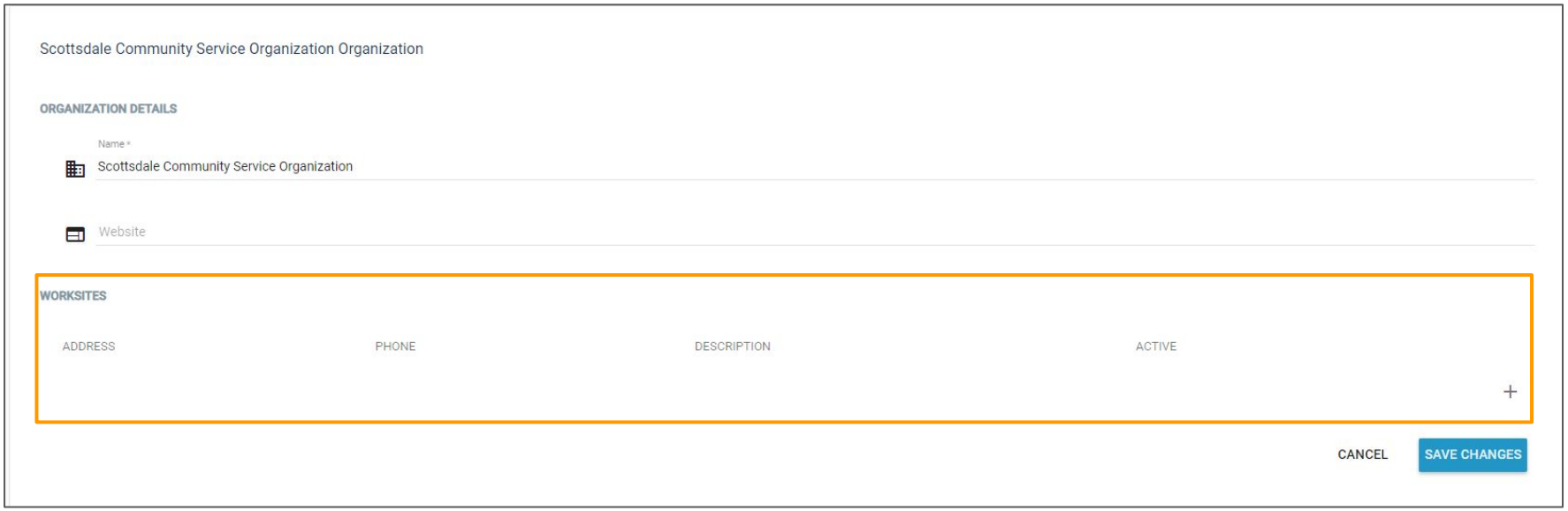
Administration - Accounting Settings

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.



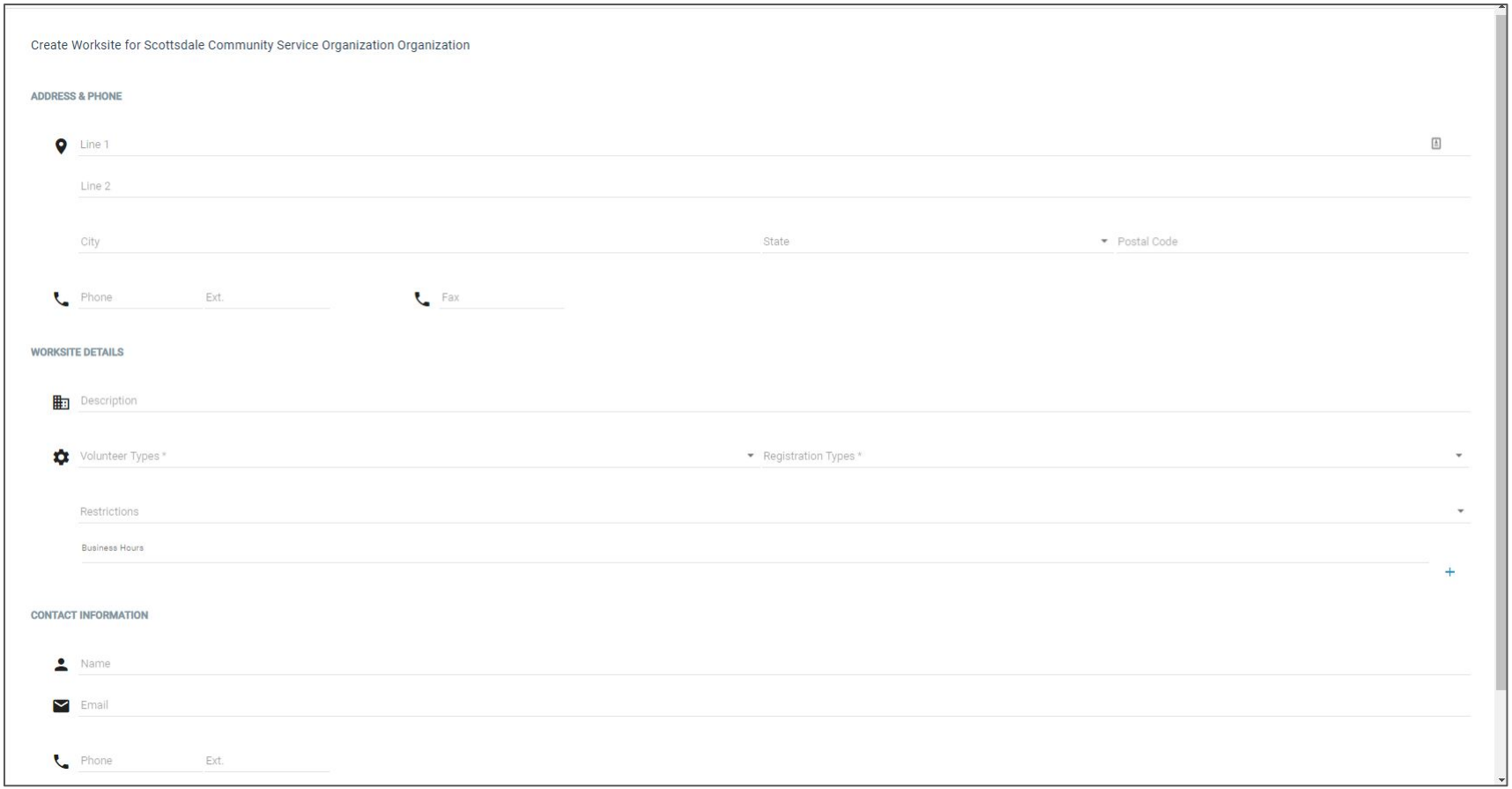
Administration - Community Service Settings

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



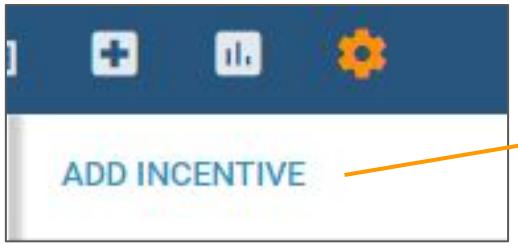
Administration - Community Service Settings

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.



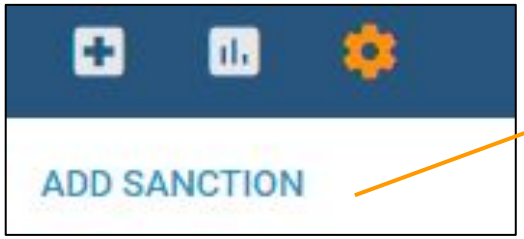
Administration - Compliance Settings

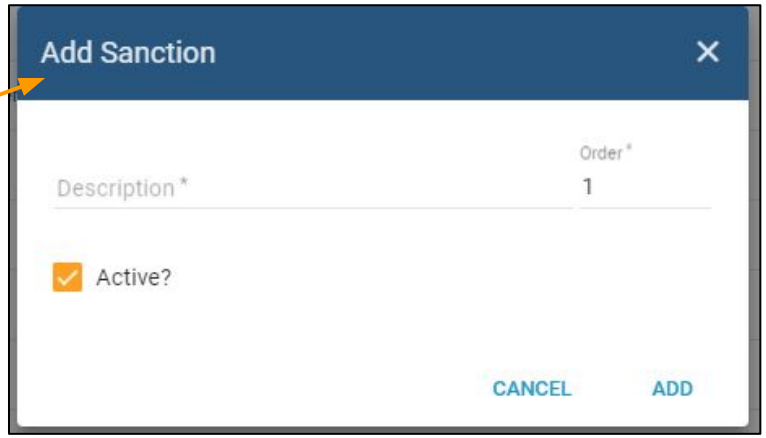
Clicking on *Add Incentive* will allow the Admin to add a new Incentive. Admins will be prompted to add the Incentive name and indicate whether it is active or not. Admins can click on the pen icon to edit the Incentive.

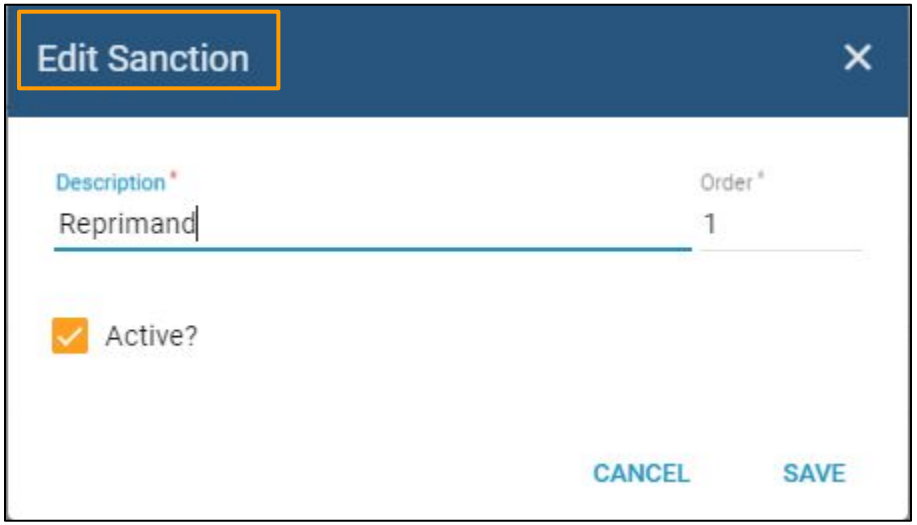


AutoMon | Administration - Compliance Settings

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.







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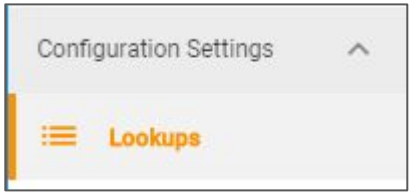
Compliance Settings - Sanctions Matrix

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

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

Administration - Configuration Settings

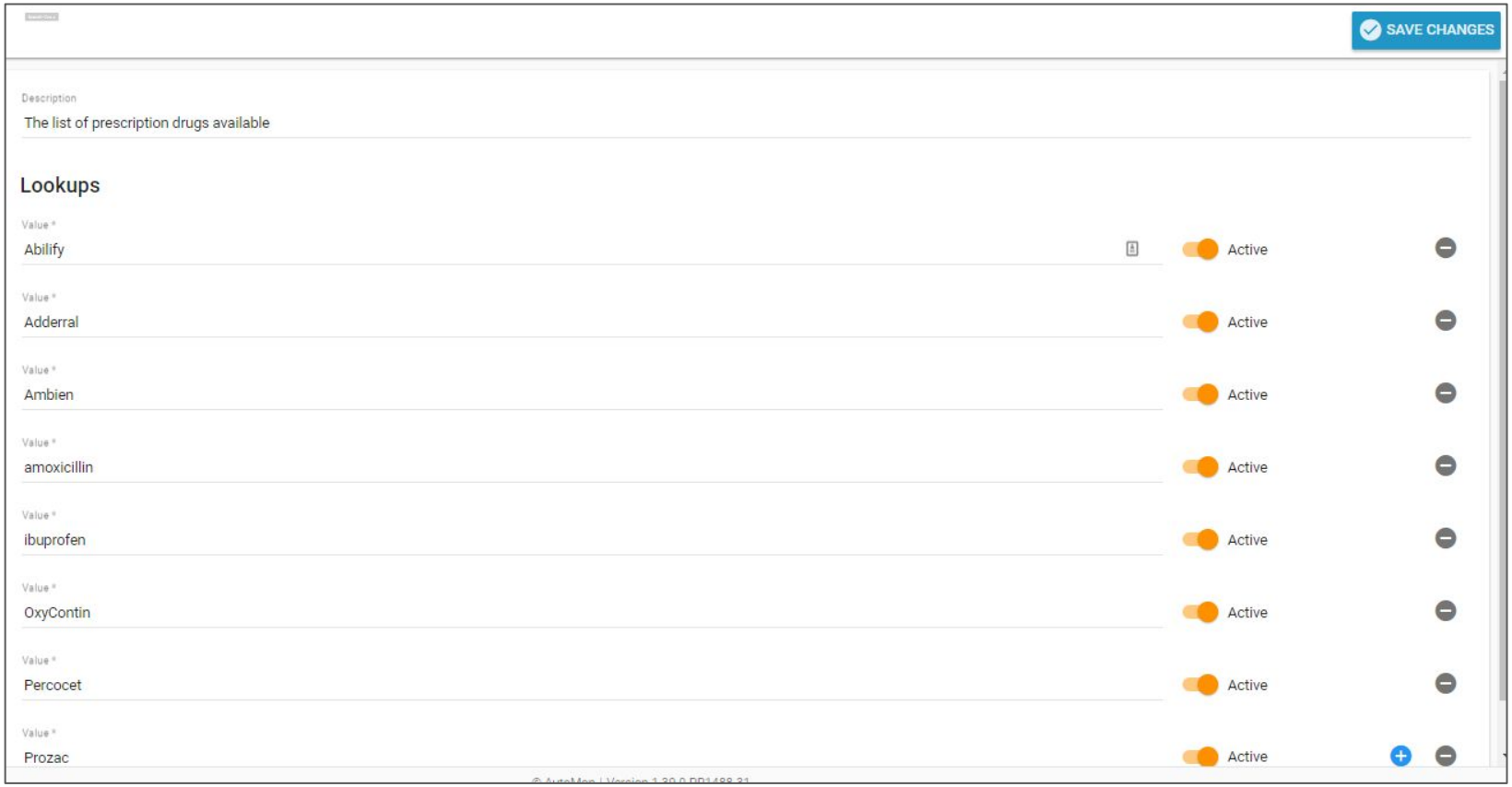
Admins can add additional details to Lookups, such as the list of allergies, Community Service worksite restrictions, drug of choice list, prescription drug list, etc. Clicking on the *Lookup* hyperlink will allow the admin add to the Lookup list for that specific Lookup item.



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

AutoMon | Administration - Configuration Settings

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



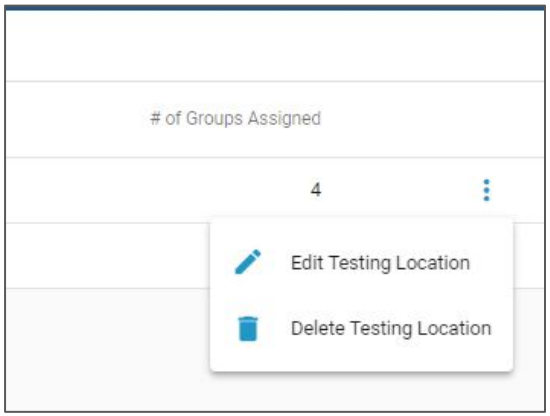
Administration - Drug Testing Settings

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

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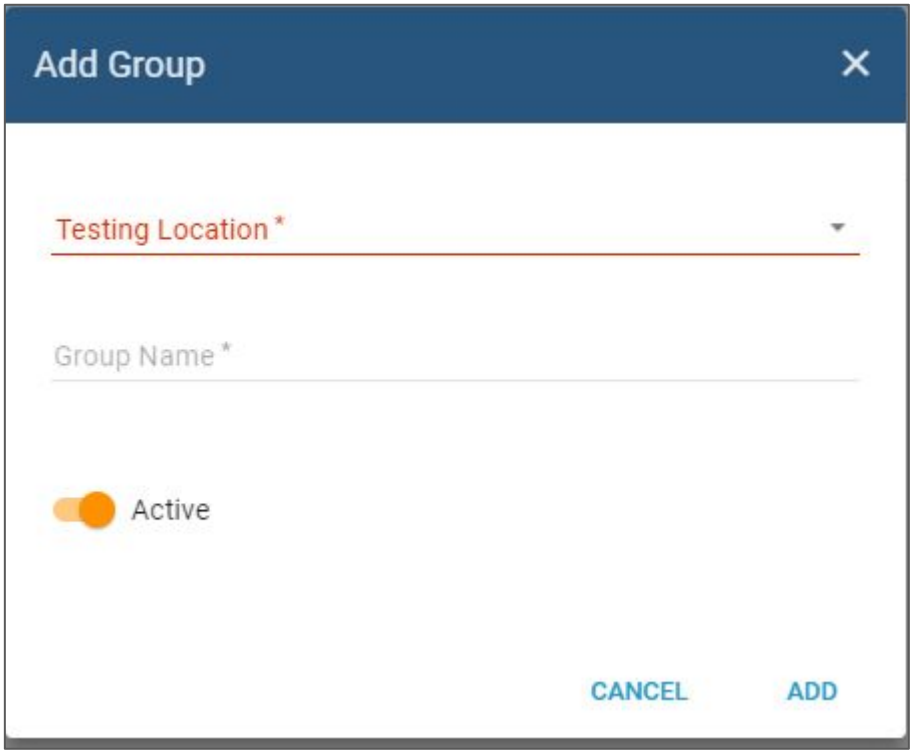
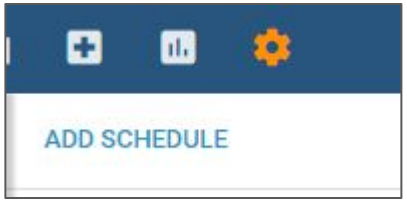
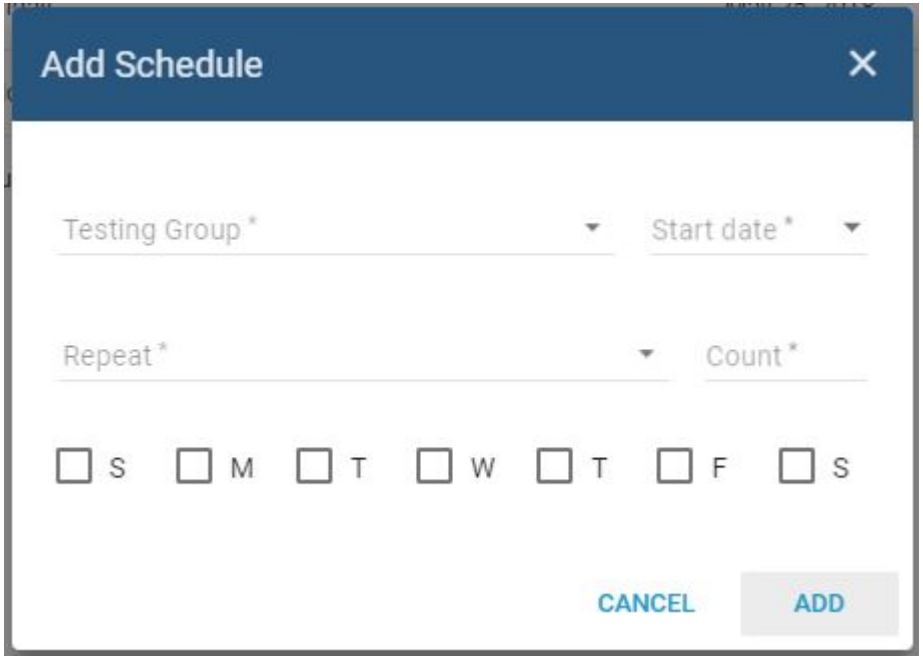
Admins can click on the *Add Group* link to add a new Drug Test group. When adding a new Drug Test group, the Admin is required to add the testing location and the group name.



Administration - Drug Testing Settings

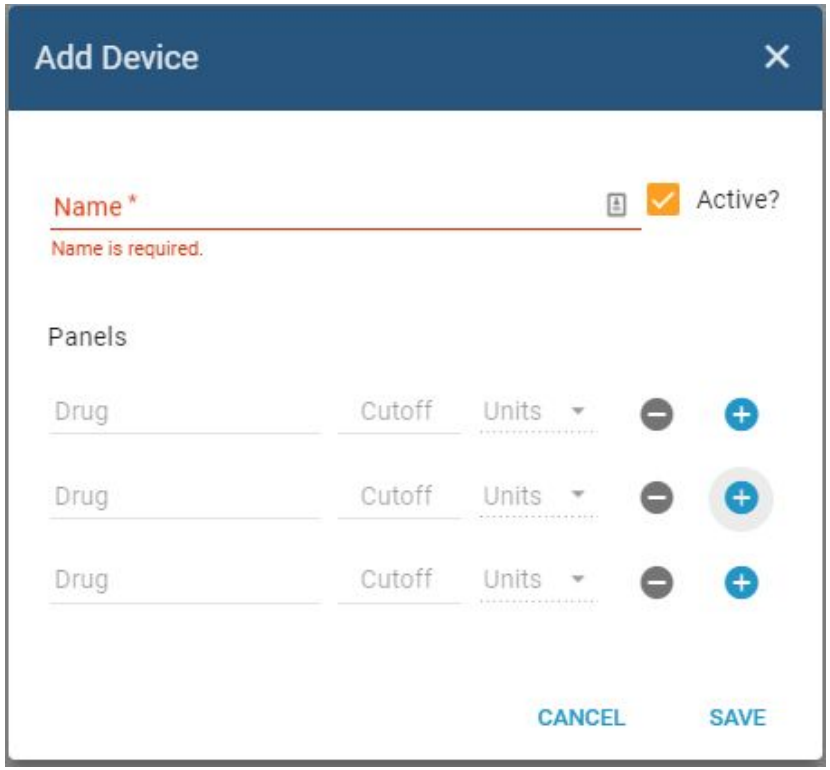
Admins can click on the *Add Schedule* link to add drug testing randomization. This schedule will automatically schedule drug tests based on the randomization rules.





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.



Administration - Hearing Settings

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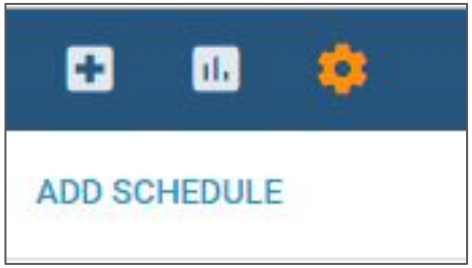
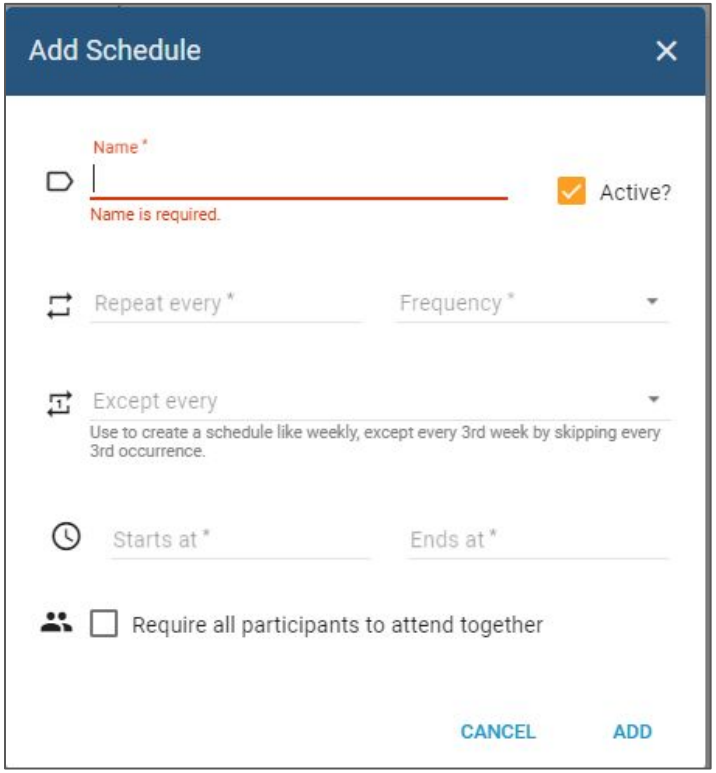
Admins can click on the *Add Schedule* link to create a Docket schedule. The Admin will be required to enter the Docket schedule name, indicate the frequency, and indicate if the schedule requires that all Clients attend the hearing together.





Administration - Specialty Court Settings

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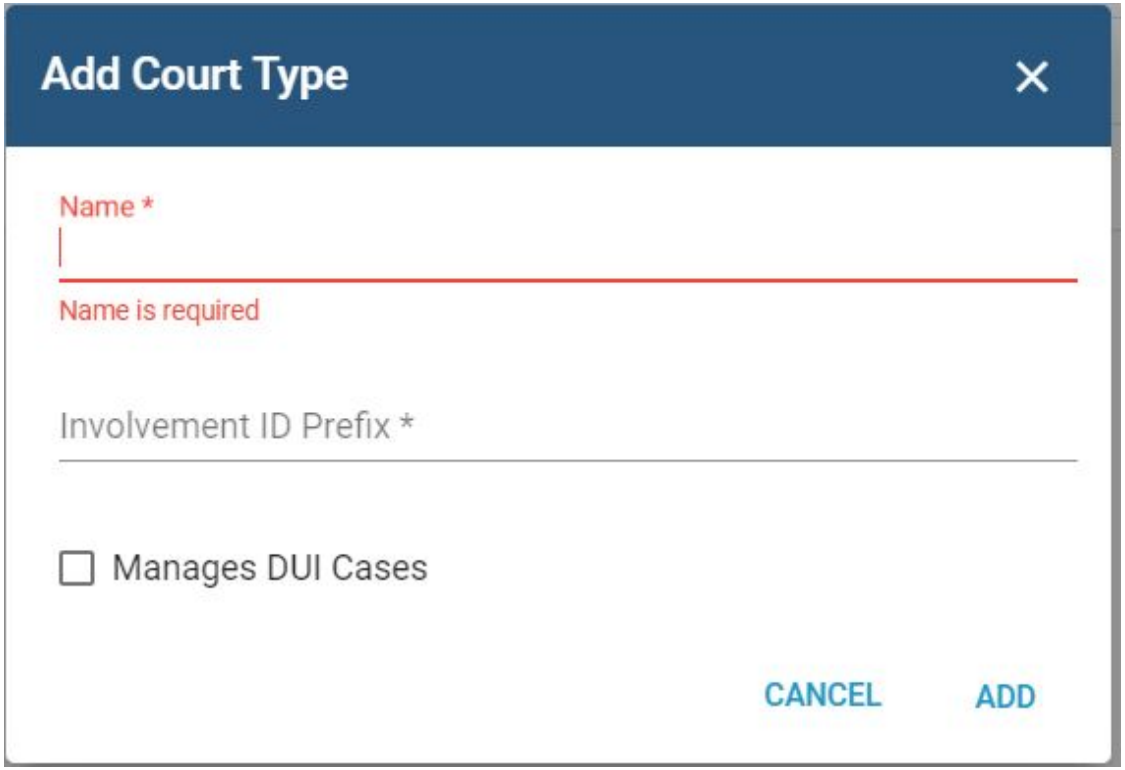
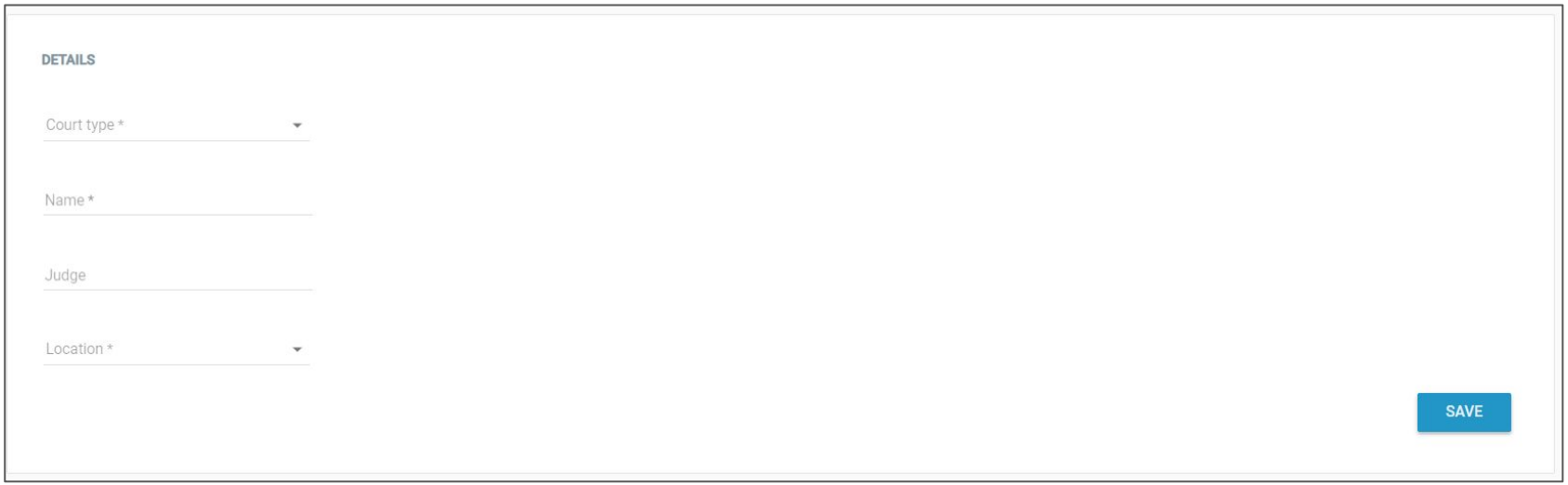
Admins can click on the *Add Court Type* link under the Specialty Court Settings section. This will allow an Admin to add a new Court type. The Admin is required to type the Court Type name and the Involvement ID prefix. Admins can also indicate if the Court type manages DUI cases.



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.



Administration - Specialty Court Settings

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

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

Administration - Specialty Court Settings

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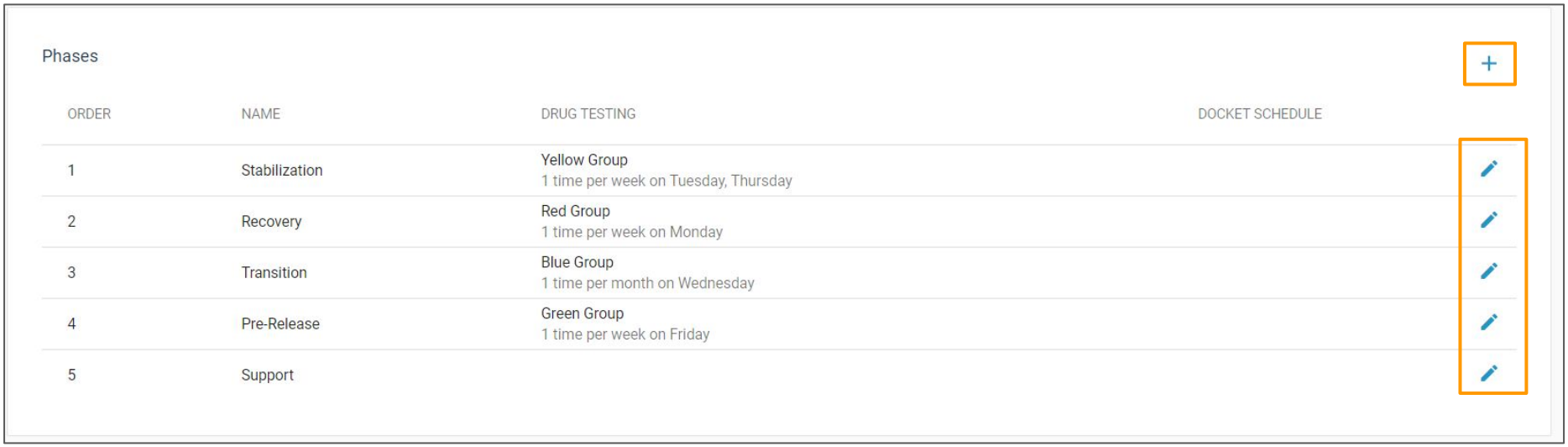
Within *Specialty Court Settings*, Admins can add program Track(s). Phases are assigned to Tracks. Tracks can be used to group clients together – this grouping can be based by risks, needs, severity of charge, etc. To add multiple Tracks, Admins can click on the + icon on the right. Click on the *Default* 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.



Administration - Specialty Court Settings

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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.

Administration - Specialty Court Settings

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

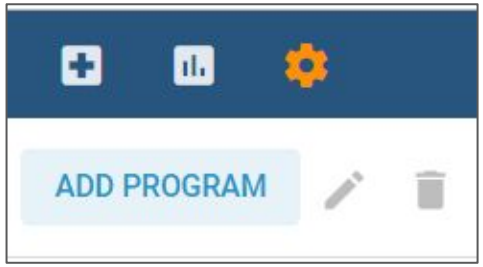
Milestones

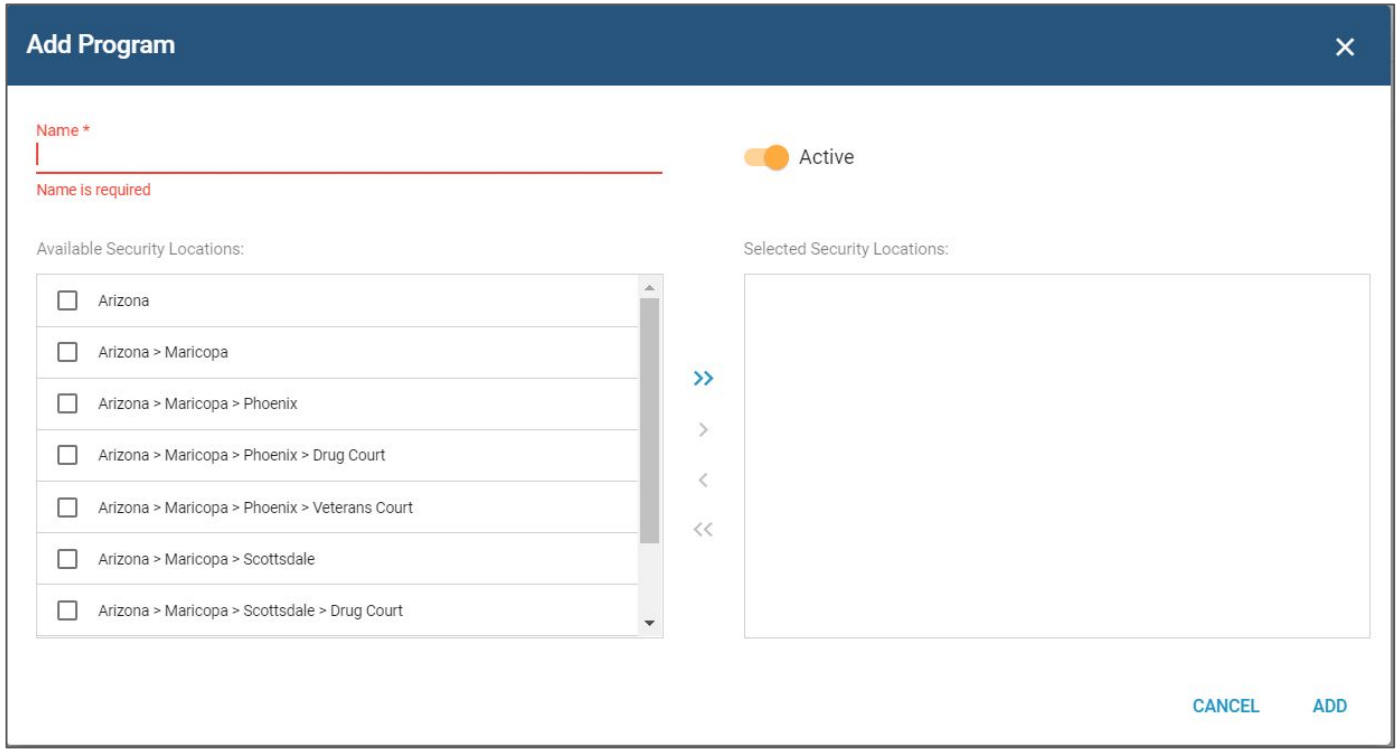
1	Sign contract	Task	0	Days Sober
2	Sign color line	Task	0	Days Sober
3	Report to re-entry or recovery facility as ordered	Task	3	Days Sober
4	Report to case manager	Task	3	Days Sober
5	Contact Dr. Murphey	Task	7	Days Sober
6	Contact treatment provider to enter treatment	Task	7	Days Sober
7	Review participant 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

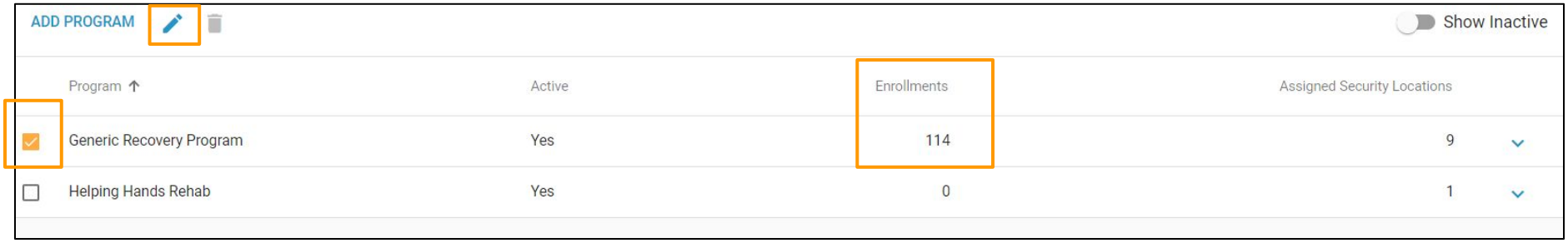
Admins can click on the *Add Program* link under the Treatment/Education section to add a new Program. Programs are assigned to specific security locations.

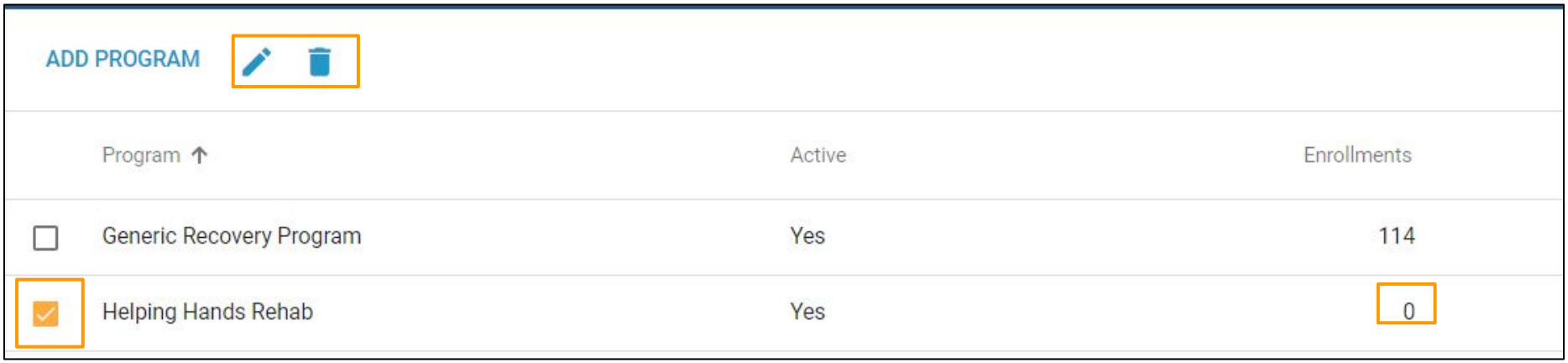




Administration - Treatment/Education Settings

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*.





Topic 33: Support

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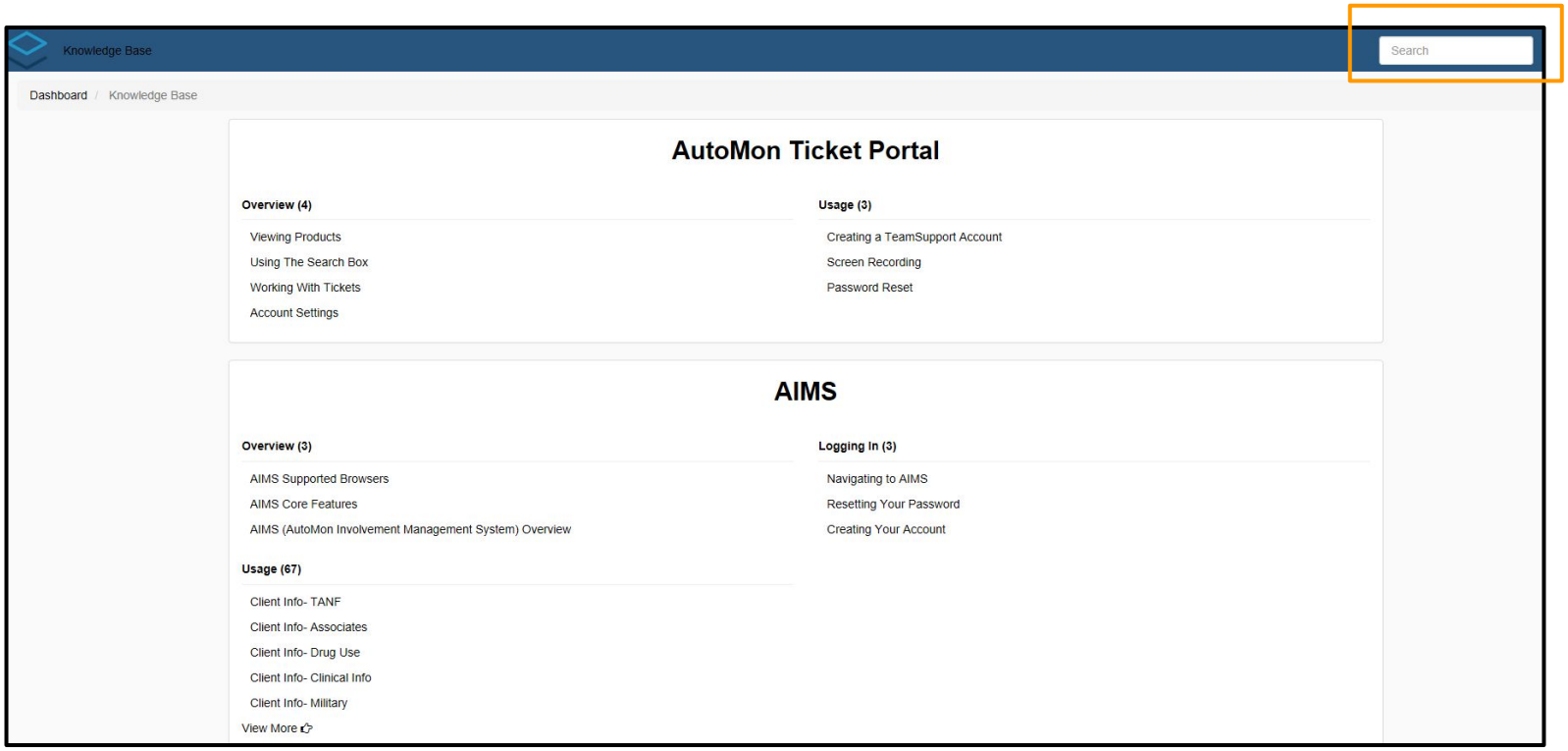
Subtopics:

1. Searching Knowledge Base
2. Reporting Issues

Support - Searching Knowledge Base

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



Support - Reporting Issues

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