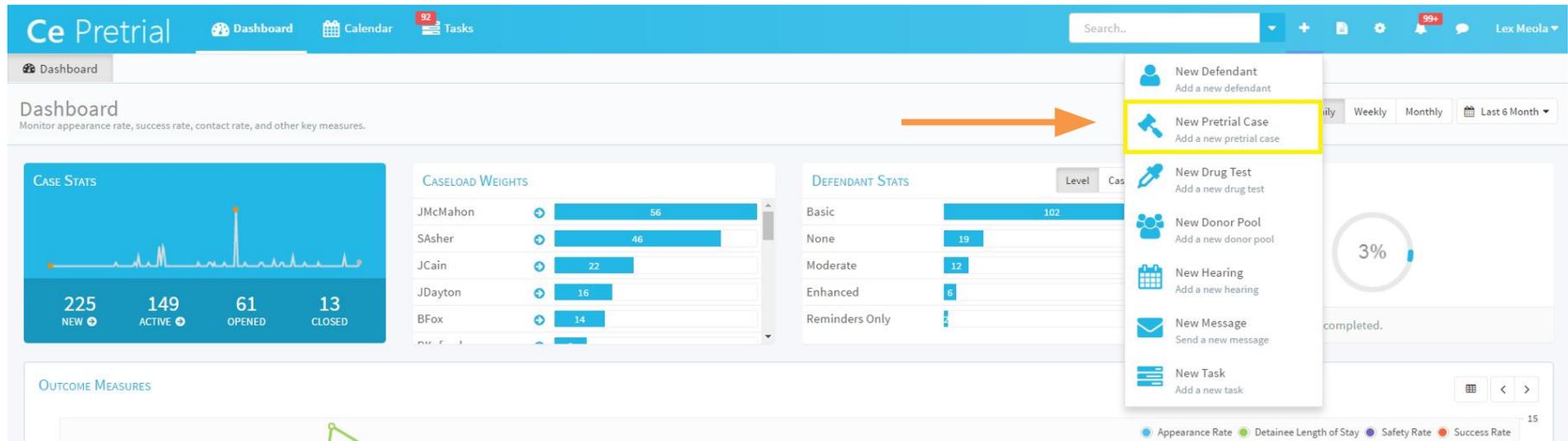




OPEN PRETRIAL CASE

NAVIGATE TO NEW PRETRIAL CASE

To add a New Pretrial Case into the application, the user must click on the Plus Sign Icon and select “New Pretrial Case.”

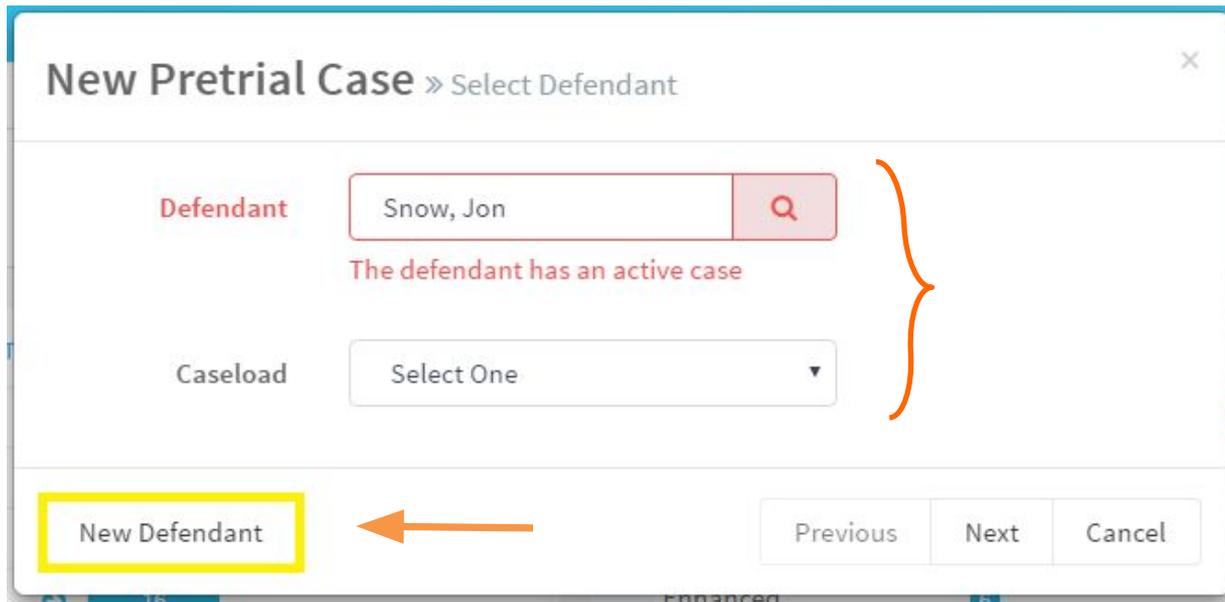


The screenshot shows the CePretrial dashboard interface. The top navigation bar includes 'Dashboard', 'Calendar', and 'Tasks' (with a notification badge for 92 tasks). A search bar and user profile 'Lex Meola' are on the right. The main dashboard area is titled 'Dashboard' and contains several data visualization components: 'CASE STATS' with a line chart and four metrics (225 NEW, 149 ACTIVE, 61 OPENED, 13 CLOSED); 'CASELOAD WEIGHTS' table; 'DEFENDANT STATS' table; and 'OUTCOME MEASURES' section. A dropdown menu is open from a plus sign icon, with the 'New Pretrial Case' option highlighted in yellow. An orange arrow points to this menu. The menu items are: 'New Defendant', 'New Pretrial Case', 'New Drug Test', 'New Donor Pool', 'New Hearing', 'New Message', and 'New Task'. A legend at the bottom right identifies metrics: Appearance Rate, Detainee Length of Stay, Safety Rate, and Success Rate.

Case Manager	Weight
JMcMahon	56
SAsher	46
JCain	22
JDayton	16
BFox	14

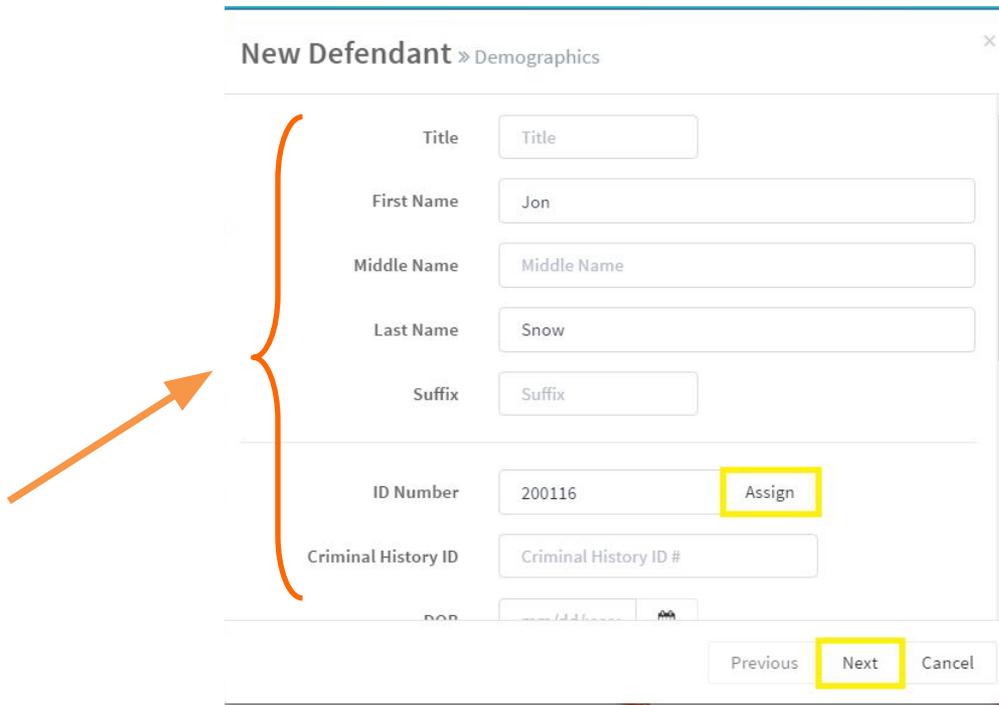
Level	Count
Basic	102
None	19
Moderate	12
Enhanced	6
Reminders Only	1

After the user has selected, “New Pretrial Case” they will be navigated to a prompt where they will enter the defendant’s name in the search bar and select a caseload from the pick list. The search bar allows the user to determine if the defendant is already in the system to avoid duplicate entries. The user should then select “Next” to perform a search for the new defendant. If the defendant is not already in the system, the application will generate the message, “Defendant does not exist” under the new defendant field. If the defendant does not exist, the user will click on “New Defendant” to begin the process of entering a new defendant into the application.

A screenshot of a web application dialog box titled "New Pretrial Case » Select Defendant". The dialog has a close button (X) in the top right corner. It contains two main input fields: "Defendant" and "Caseload". The "Defendant" field is a search bar with the text "Snow, Jon" and a magnifying glass icon. Below it, a red error message reads "The defendant has an active case". The "Caseload" field is a dropdown menu with "Select One" and a downward arrow. At the bottom, there are four buttons: "New Defendant" (highlighted with a yellow box and an orange arrow pointing to it from the left), "Previous", "Next", and "Cancel". An orange bracket on the right side of the dialog groups the "Defendant" search bar, the error message, and the "Caseload" dropdown menu.

ADD A DEFENDANT'S DEMOGRAPHICS

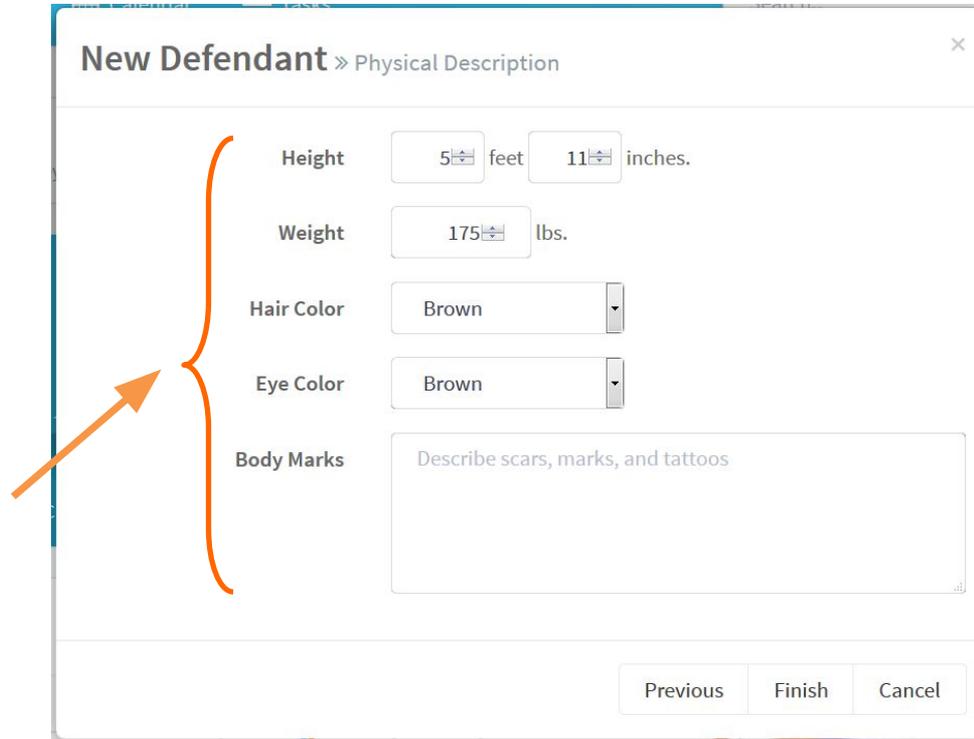
Once you are on the New Defendant page, to add a Defendant's demographics you must fill in the text field boxes with the Defendant's name, ID number, date of birth, gender, primary language and race. There is also the ability to select their ethnicity as being of Hispanic origin. Defendant demographics do not need to be complete to move on in the process. The only necessary item to move forward in the new defendant wizard is a defendant's name and ID number.

A screenshot of a web form titled "New Defendant > Demographics". The form contains several input fields: "Title" (empty), "First Name" (filled with "Jon"), "Middle Name" (empty), "Last Name" (filled with "Snow"), "Suffix" (empty), "ID Number" (filled with "200116"), and "Criminal History ID" (empty). To the right of the "ID Number" field is a yellow "Assign" button. At the bottom of the form are three buttons: "Previous", "Next" (highlighted in yellow), and "Cancel". An orange arrow points from the left towards the "ID Number" field, and a large orange bracket is positioned to the left of the "ID Number" and "Criminal History ID" fields.

Note: If you do not want to manually enter an ID number for a defendant, an ID Number can be Auto Assigned by leaving the ID Number blank or clicking the "Assign" button to the right of the ID Number field.

ADD A DEFENDANT'S PHYSICAL DESCRIPTION

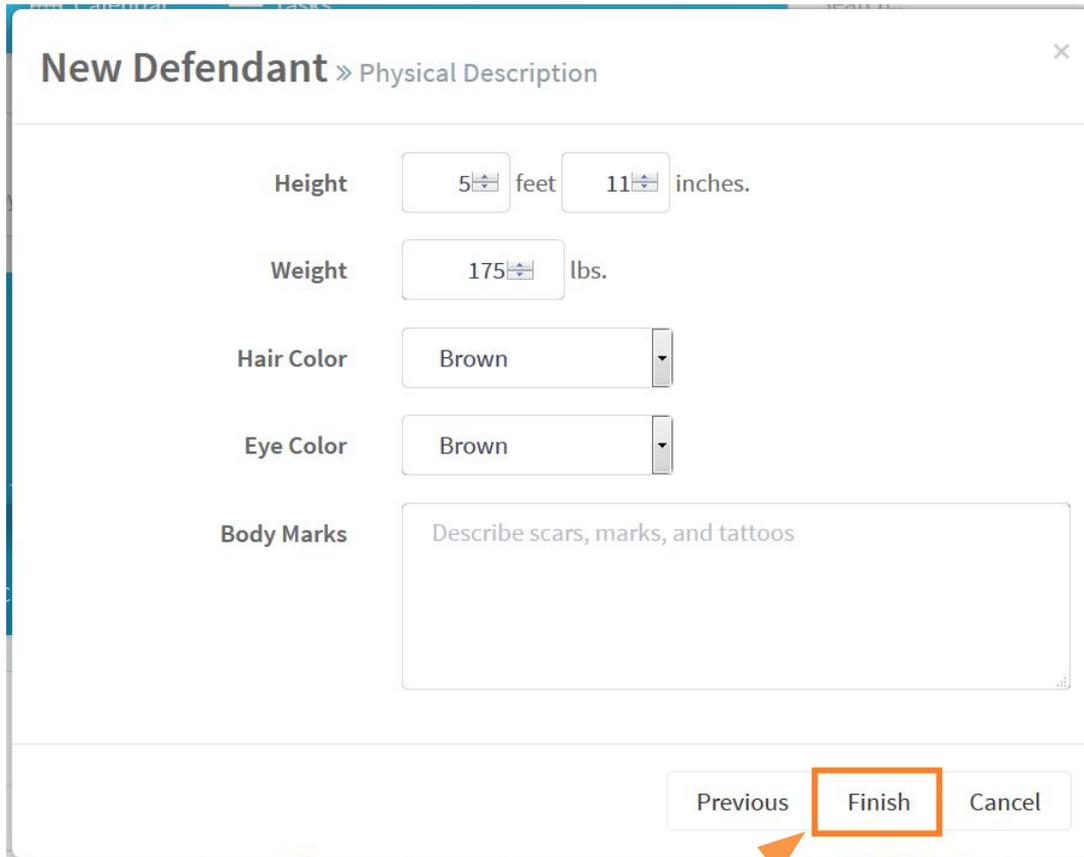
To add a Defendant's Physical Description fill in the text field boxes with their height in feet and inches, weight in pounds, hair color, eye color and any additional body marks, scars or tattoos.

A screenshot of a software window titled "New Defendant » Physical Description". The window contains several input fields: "Height" with two spinners for feet (set to 5) and inches (set to 11); "Weight" with a spinner for pounds (set to 175); "Hair Color" and "Eye Color" with dropdown menus both set to "Brown"; and a large text area for "Body Marks" with the placeholder text "Describe scars, marks, and tattoos". An orange arrow points to the "Body Marks" field, and an orange bracket groups the "Hair Color" and "Eye Color" fields. At the bottom right, there are three buttons: "Previous", "Finish", and "Cancel".

Note: Body Marks must be separated by commas.

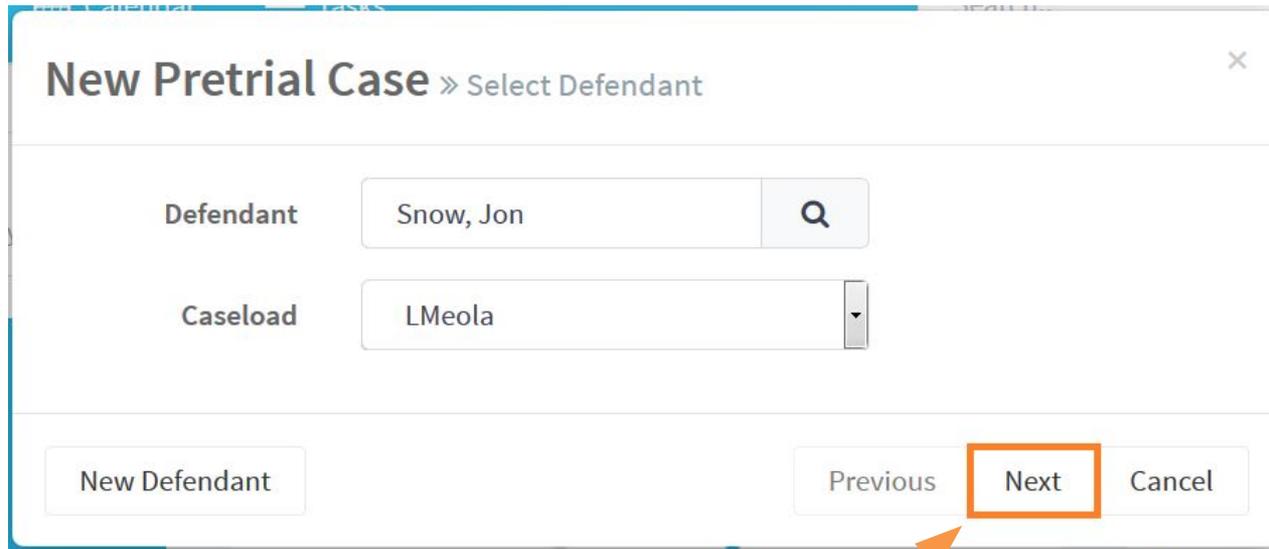
SAVE CHANGES TO A DEFENDANT

To save the changes you have made on a new defendant and to complete the process the user must select “finish” after the physical description is complete.

A screenshot of a web form titled "New Defendant » Physical Description". The form contains several input fields: "Height" with spinners for "5" feet and "11" inches; "Weight" with a spinner for "175" lbs.; "Hair Color" and "Eye Color" both set to "Brown" via dropdown menus; and a "Body Marks" text area with the placeholder text "Describe scars, marks, and tattoos". At the bottom right, there are three buttons: "Previous", "Finish" (highlighted with an orange box and an orange arrow pointing to it), and "Cancel".

ADDING A NEW PRETRIAL CASE PROMPT

Once the user has selected “Finish” and saved the demographics of a defendant, they will be navigated to the New Pretrial Case screen again. The user will then select, “Next” to assign the defendant to a pretrial case.

A screenshot of a software dialog box titled "New Pretrial Case » Select Defendant". The dialog has a white background and a blue border. It contains two input fields: "Defendant" with the text "Snow, Jon" and a search icon, and "Caseload" with the text "LMeola" and a dropdown arrow. At the bottom, there are three buttons: "New Defendant", "Previous", and "Cancel". The "Next" button is highlighted with an orange border, and an orange arrow points to it from the bottom right.

New Pretrial Case » Select Defendant

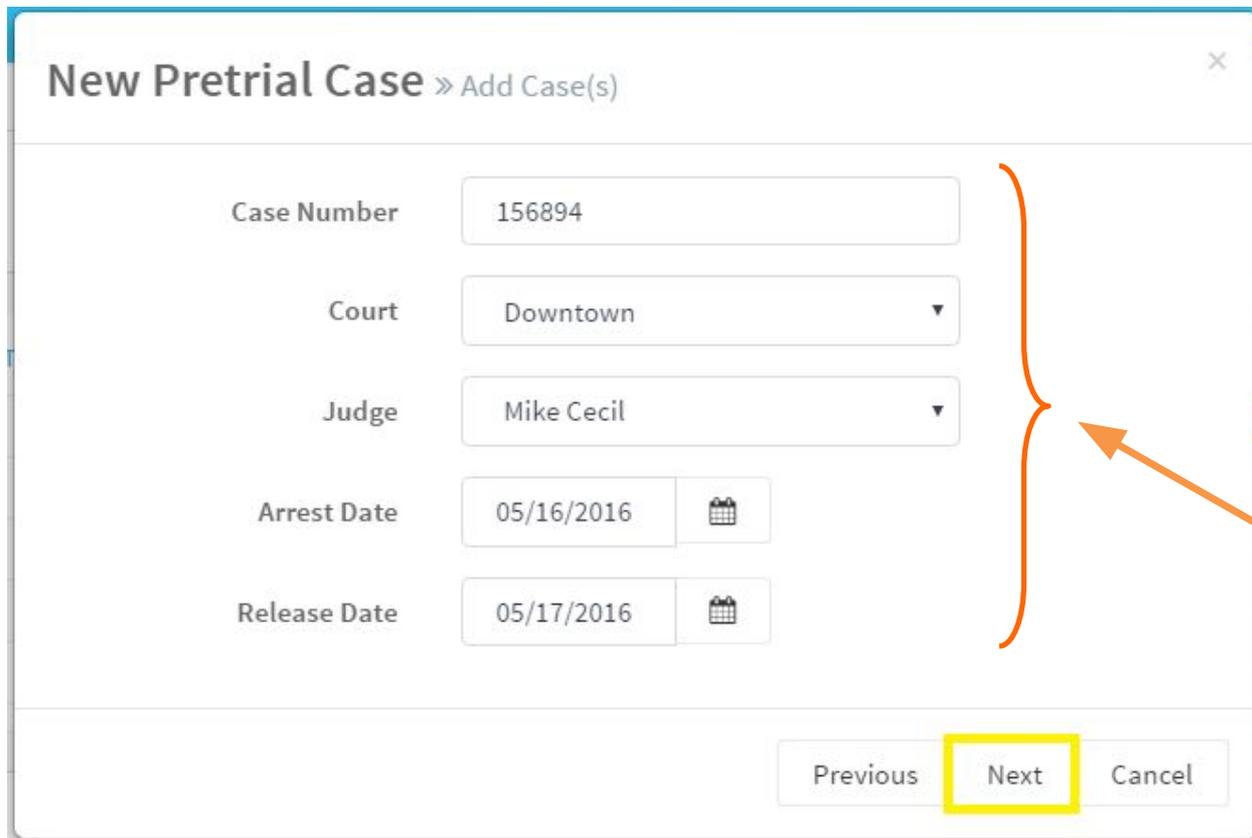
Defendant Snow, Jon

Caseload LMeola

New Defendant Previous **Next** Cancel

ADDING A NEW PRETRIAL CASE - CONTINUED

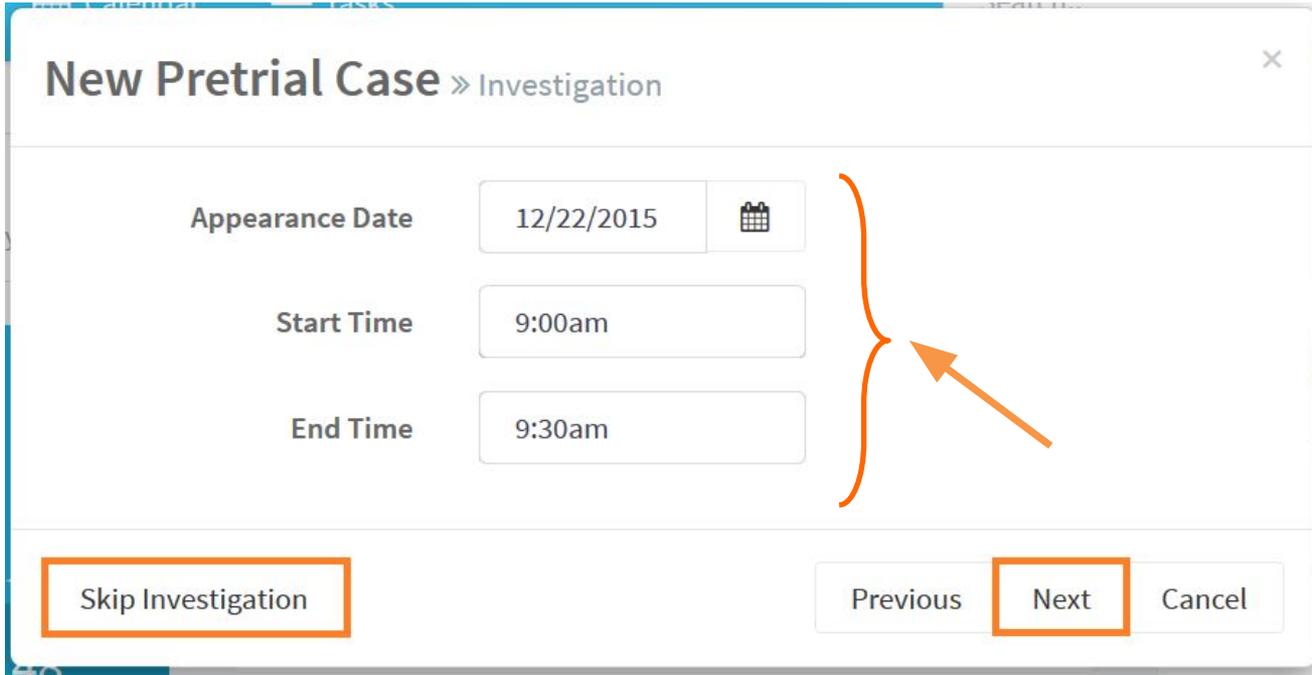
To add a new pretrial case, the user needs to enter the case number, select a court and judge from the pick lists, determine the arrest date, release date, and select the crime categories that pertain to the defendant's case. Once the necessary information has been entered, the user will then select "Next" to be moved to the next step.

A screenshot of a web application form titled "New Pretrial Case » Add Case(s)". The form contains several input fields: "Case Number" with the value "156894", "Court" with a dropdown menu showing "Downtown", "Judge" with a dropdown menu showing "Mike Cecil", "Arrest Date" with the value "05/16/2016" and a calendar icon, and "Release Date" with the value "05/17/2016" and a calendar icon. An orange bracket on the right side of the form groups the "Case Number", "Court", and "Judge" fields. An orange arrow points from the right towards the "Next" button. At the bottom of the form, there are three buttons: "Previous", "Next" (which is highlighted with a yellow border), and "Cancel".

Case Number	156894
Court	Downtown
Judge	Mike Cecil
Arrest Date	05/16/2016
Release Date	05/17/2016

ADDING A NEW PRETRIAL CASE - CONTINUED

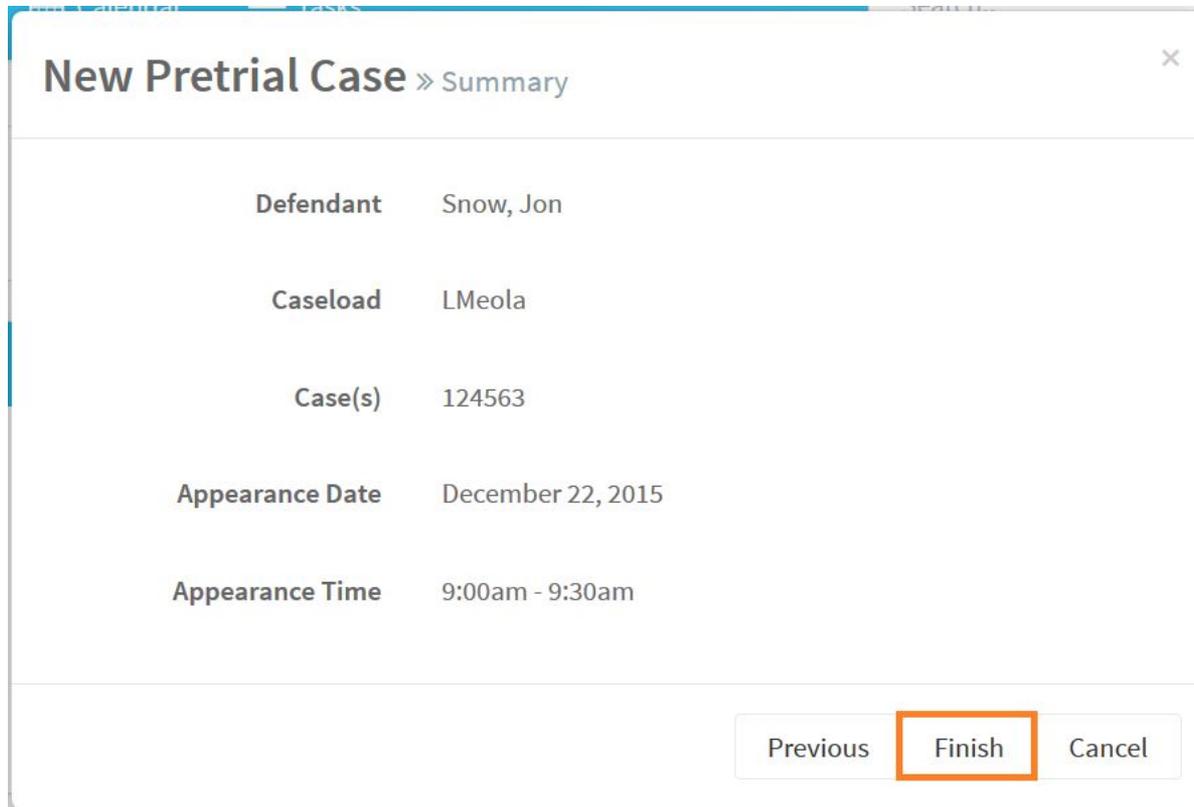
To add a new pretrial case, the user needs to enter the case number, select a court and judge from the pick lists, determine the arrest date, release date, and select the crime categories that pertain to the defendant's case. Once the necessary information has been entered, the user will then select "Next" to be moved to the next step in the Investigation process.

A screenshot of a software dialog box titled "New Pretrial Case » Investigation". The dialog has a close button (X) in the top right corner. It contains three input fields: "Appearance Date" with the value "12/22/2015" and a calendar icon, "Start Time" with the value "9:00am", and "End Time" with the value "9:30am". An orange bracket on the right side of these three fields points to the "Next" button. At the bottom left, there is a button labeled "Skip Investigation". At the bottom right, there are three buttons: "Previous", "Next", and "Cancel". The "Next" button is highlighted with an orange border.

Note: If your agency is not using the Investigation functionality, the user has the ability to skip the Investigation by selecting, "Skip Investigation" at the bottom left of the dialog. Opting to skip the Investigation will take the user to the Start Supervision dialog after creating a new case.

NEW PRETRIAL CASE SUMMARY

Once the user has determined the appearance date and selected “Next,” they will be directed to a summary of the Pretrial Case information. The summary will include the defendant’s name, which caseload they are assigned to, their case number, appearance date, and appearance time. After verifying that the Pretrial Case Summary is correct, the user should then select “Finish,” to add the Pretrial Case into the system.

A screenshot of a software dialog box titled "New Pretrial Case » Summary". The dialog box contains a summary of case information with the following fields:

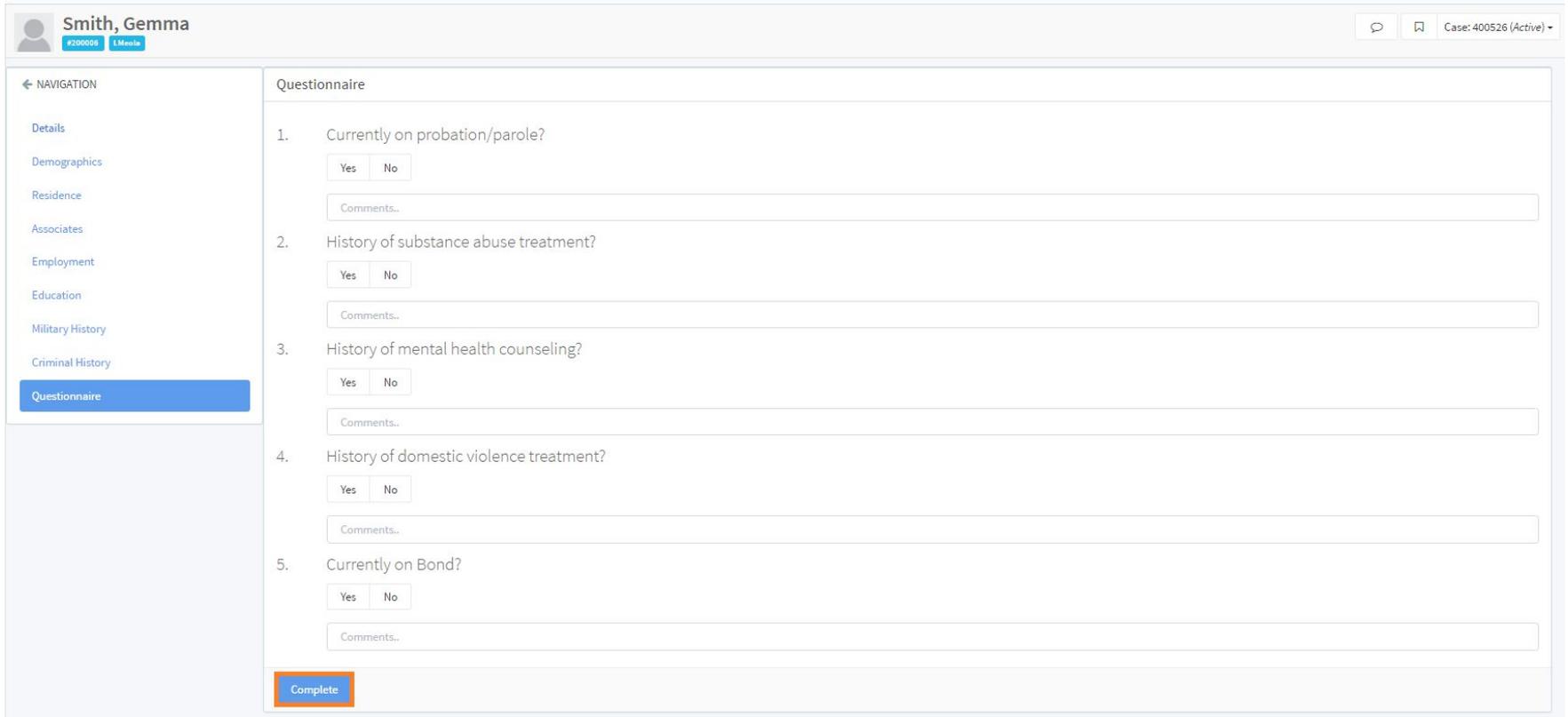
Defendant	Snow, Jon
Caseload	LMeola
Case(s)	124563
Appearance Date	December 22, 2015
Appearance Time	9:00am - 9:30am

At the bottom of the dialog box, there are three buttons: "Previous", "Finish", and "Cancel". The "Finish" button is highlighted with an orange border.

Subtopics:

1. Adding Additional Defendant Info
2. Add A Defendant's Address
3. Add A Defendant's Phone Number
4. SMS Reminders
5. Add A Defendant's Employment
6. Add A Defendant's Associates

To enter Questionnaire information, the User will select, "Questionnaire" and fill out the necessary information.



The screenshot shows a web application interface for a user named Gemma Smith. The user's profile information, including ID #200008 and last login on 1/1 March, is visible at the top left. A navigation menu on the left lists various sections: Details, Demographics, Residence, Associates, Employment, Education, Military History, Criminal History, and Questionnaire. The 'Questionnaire' section is currently selected and highlighted in blue. The main content area displays five numbered questions, each with a 'Yes' and 'No' radio button and a 'Comments...' text input field. The questions are: 1. Currently on probation/parole?, 2. History of substance abuse treatment?, 3. History of mental health counseling?, 4. History of domestic violence treatment?, and 5. Currently on Bond?. A 'Complete' button is located at the bottom left of the form area. A large orange bracket on the right side of the form indicates the main content area.

Smith, Gemma
#200008 1/1 March

Case: 400526 (Active)

← NAVIGATION

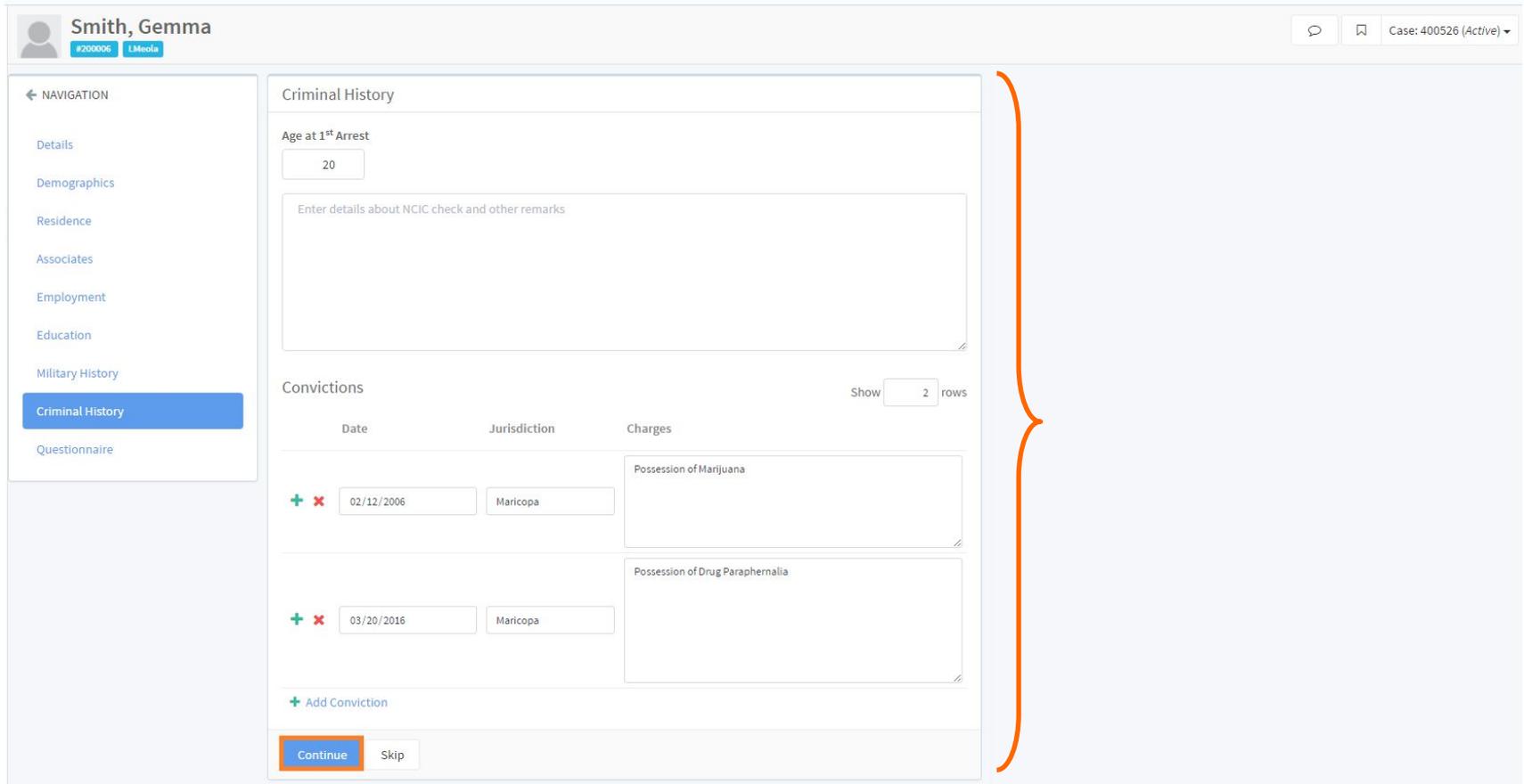
- Details
- Demographics
- Residence
- Associates
- Employment
- Education
- Military History
- Criminal History
- Questionnaire**

Questionnaire

1. Currently on probation/parole?
 Yes No
Comments..
2. History of substance abuse treatment?
 Yes No
Comments..
3. History of mental health counseling?
 Yes No
Comments..
4. History of domestic violence treatment?
 Yes No
Comments..
5. Currently on Bond?
 Yes No
Comments..

Complete

To enter Criminal History, the User has the option to enter the age at first arrest, additional details in a free-text box, and any prior convictions with their associated Date, Jurisdiction, and Charges.



The screenshot shows a user interface for entering criminal history. The user is identified as Smith, Gemma. The form is titled "Criminal History" and includes the following sections:

- Age at 1st Arrest:** A text input field containing the value "20".
- Details:** A large text area for entering details about NCIC check and other remarks.
- Convictions:** A table with columns for Date, Jurisdiction, and Charges. It displays two rows of convictions, each with a "Show" button and a "rows" indicator.

Date	Jurisdiction	Charges
02/12/2006	Maricopa	Possession of Marijuana
03/20/2016	Maricopa	Possession of Drug Paraphernalia

At the bottom of the form, there are "Continue" and "Skip" buttons. A large orange bracket on the right side of the form highlights the "Age at 1st Arrest", "Details", and "Convictions" sections.

The user will then be directed to the Investigation Overview where they will select “Add Assessment” to conduct an assessment on the Defendant. If the tenant conducts an Interview, the user may select “Add Interview” to conduct an Interview before the Assessment process. Once the assessment has been completed, the user will select “Save Changes” to save the assessment and move on to the next step.

 **Linden, Rebecca**
#200012 T.Jones

^ Investigation Information Cancel Investigation

Task	Interview
Status: Open	+ Add Interview
Reason: Initial	

Virginia Pretrial Risk Assessment

- Charge Type
 Felony Misdemeanor
- Pending Charge(s)
 Yes No
- Criminal History
 Yes No
- Two or More Failures to Appear
 Yes No
- Two or More Violent Convictions
 Yes No
- Length at Current Residence Less than One Year
 Yes No
- Not Employed 2 Years/Primary Caregiver
 Yes No
- History of Drug Abuse
 Yes No

[Save Changes](#) [Cancel](#)

Sorry, there is no assessment to display

[+ Add Assessment](#)

INVESTIGATION - CONTINUED

The last component of the investigation piece is to make a recommendation. The Decision Matrix will be pre populated to make a recommendation based on the assessment that was just completed. The user may select conditions under “Other Factors” to bump up supervision in the Decision Matrix.

^ Decision Matrix

Re Arrest (→) Failure To Appear (↘)	Low +0	Below Average	Average	Above Average	High	No Release*
Low +0	ROR with Court Reminder	ROR with Basic Supervision	ROR with Moderate Supervision	ROR with Enhanced Supervision	ROR with Enhanced Supervision, or Detain	Detain
Below Average	ROR with Court Reminder	ROR with Basic Supervision	ROR with Moderate Supervision	ROR with Enhanced Supervision	ROR with Enhanced Supervision, or Detain	
Average	ROR with Basic Supervision	ROR with Moderate Supervision	ROR with Moderate Supervision	ROR with Enhanced Supervision	ROR with Enhanced Supervision, or Detain	
Above Average	ROR with Moderate Supervision	ROR with Moderate Supervision	ROR with Moderate Supervision	ROR with Enhanced Supervision	Detain	
High	ROR with Moderate Supervision	ROR with Enhanced Supervision	ROR with Enhanced Supervision	Detain	Detain	

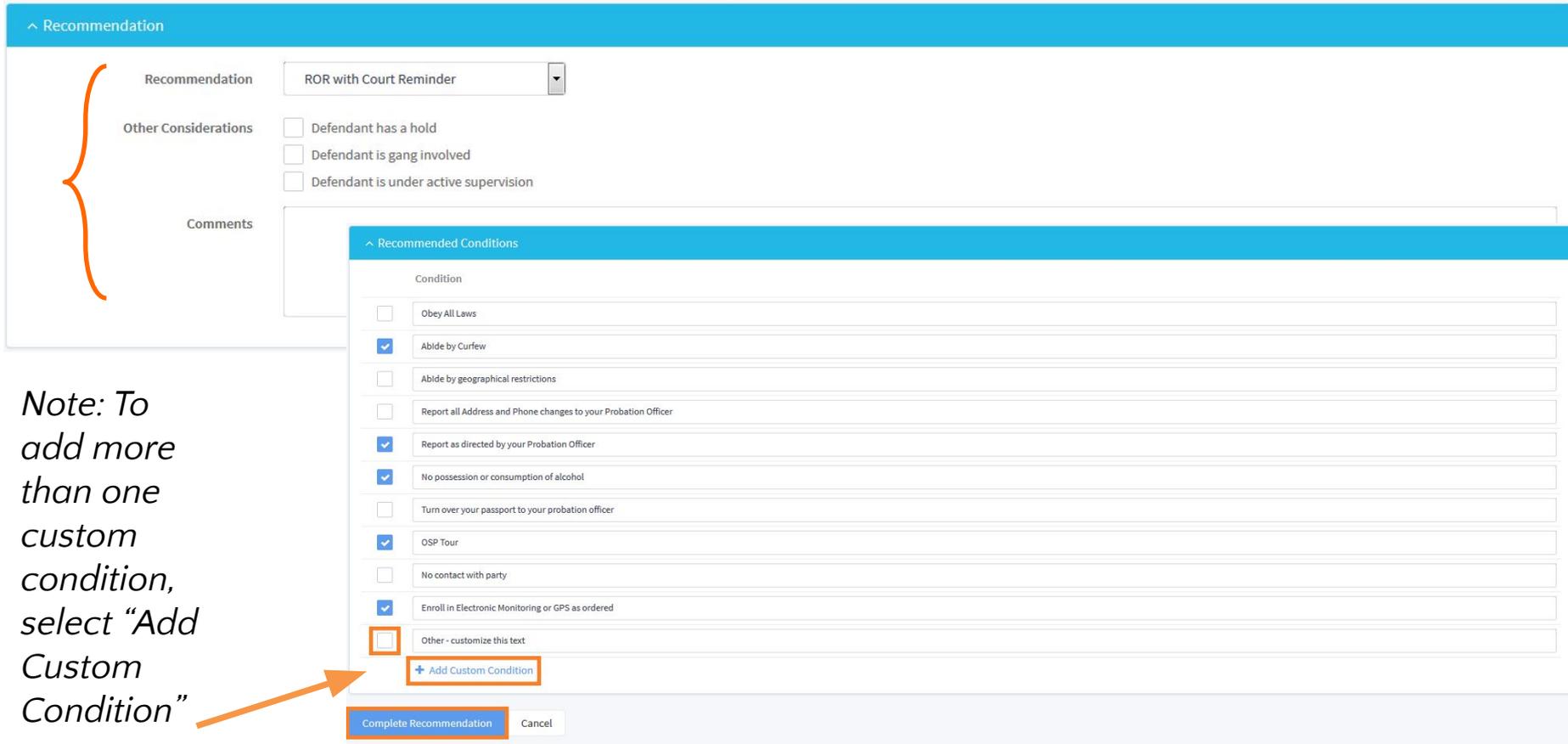
*No Release based on crime category

^ Other Factors

- PSA resulted in a New Violent Criminal Activity Flag
- Current charges include Murder 1 or 2, Assault 1, Kidnap 1, Rape 1, Robbery 1
- Defendant Extradited
- Federal or Out of County Hold
- Current charges include domestic violence, person to person sex crime, arson, or involve the use of a weapon.
- Defendant is a documented gang member

INVESTIGATION - CONTINUED

The second part of the Recommendation includes a section to designate any other considerations, a space for comments, and a prompt to select and deselect the Recommended Conditions. The user also has the ability to add as many custom conditions as they would like by manually typing in text to determine the custom condition. Once the necessary information has been entered, the user will select “Complete Recommendation” to finish the recommendation process.



The screenshot shows the 'Recommendation' form in the CePretrial system. The form is divided into several sections:

- Recommendation:** A dropdown menu currently set to 'ROR with Court Reminder'.
- Other Considerations:** Three checkboxes: 'Defendant has a hold', 'Defendant is gang involved', and 'Defendant is under active supervision'. All are currently unchecked.
- Comments:** A large text area for entering comments.
- Recommended Conditions:** A list of conditions with checkboxes:
 - Obey All Laws
 - Abide by Curfew
 - Abide by geographical restrictions
 - Report all Address and Phone changes to your Probation Officer
 - Report as directed by your Probation Officer
 - No possession or consumption of alcohol
 - Turn over your passport to your probation officer
 - OSP Tour
 - No contact with party
 - Enroll in Electronic Monitoring or GPS as ordered
 - Other - customize this text
- Buttons:** 'Complete Recommendation' and 'Cancel' buttons are at the bottom.

An orange bracket on the left side of the form groups the 'Recommendation', 'Other Considerations', and 'Comments' sections. An orange arrow points from the text 'Note: To add more than one custom condition, select "Add Custom Condition"' to the '+ Add Custom Condition' button in the 'Recommended Conditions' section.

Note: To add more than one custom condition, select "Add Custom Condition"















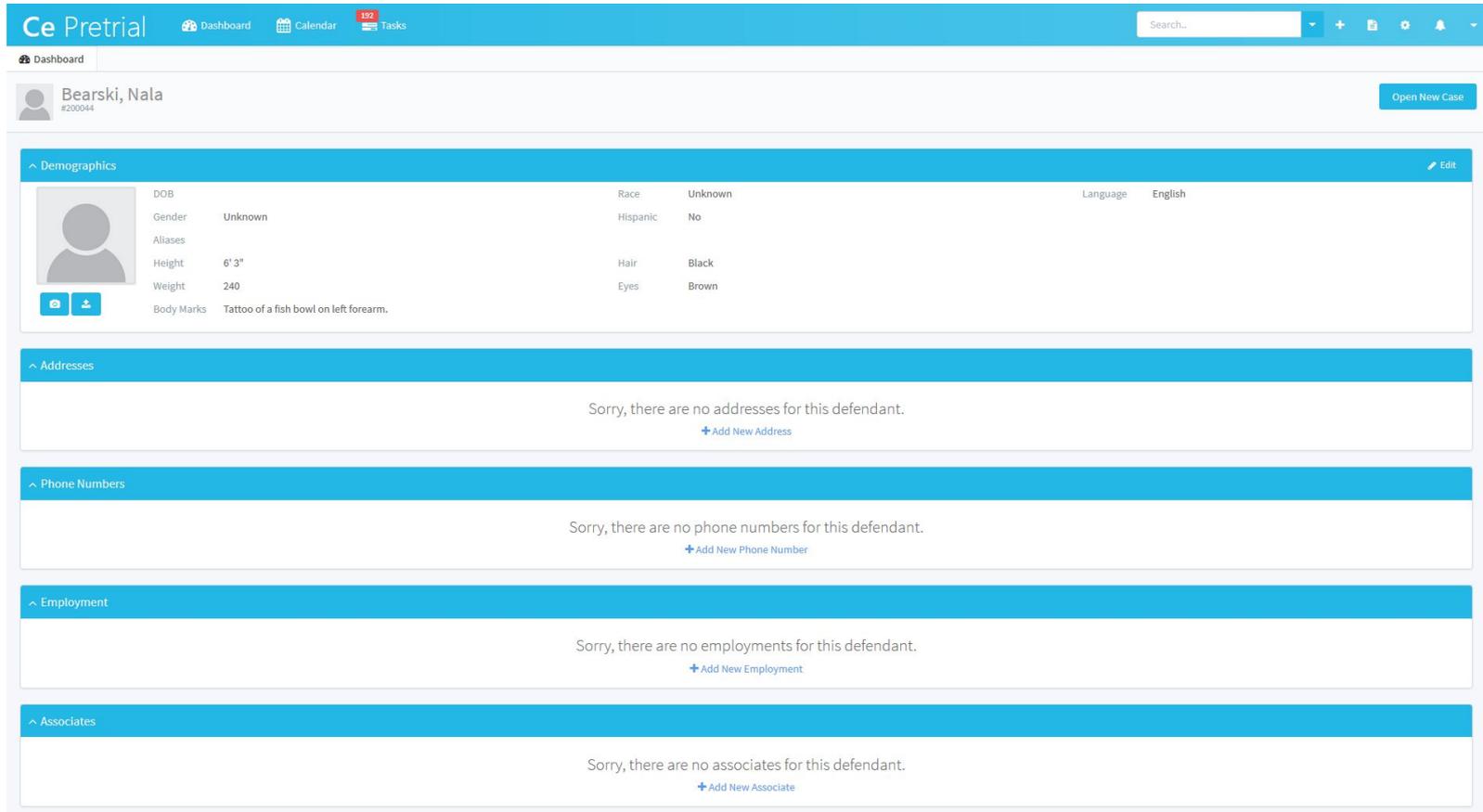








Once the user clicks “Finish” after adding a defendant’s physical description, they will be brought to the screen below where they are able to add a Defendant’s Address(s), Phone Number(s), Employment and Associates.



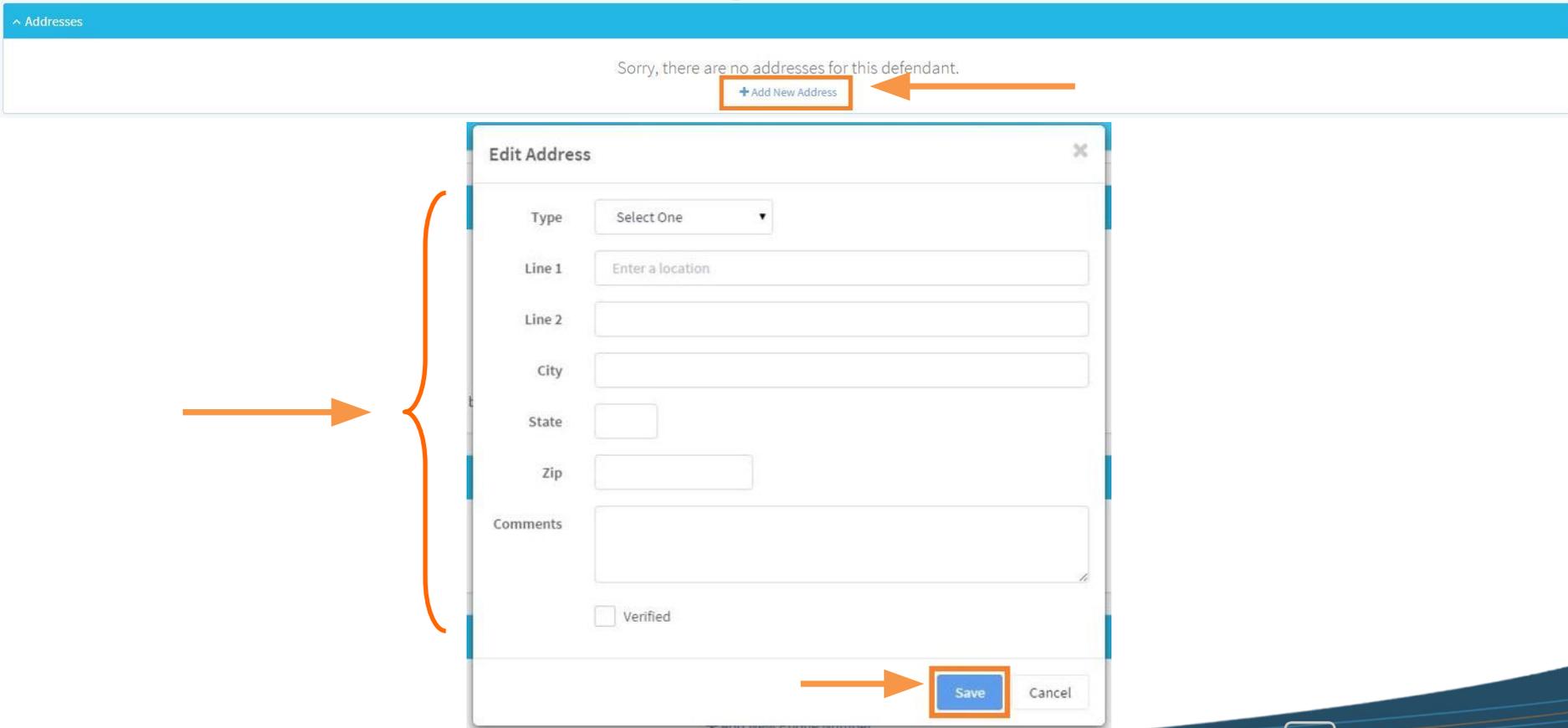
The screenshot displays the CePretrial web application interface. At the top, there is a navigation bar with 'Ce Pretrial' branding, 'Dashboard', 'Calendar', and 'Tasks' (with a notification badge for 192). A search bar and utility icons are on the right. Below the navigation bar, the user profile for 'Bearski, Nala' (ID #200044) is shown, with an 'Open New Case' button. The main content area is divided into several sections:

- Demographics:** A table of personal information with an 'Edit' button.

DOB		Race	Unknown	Language	English
Gender	Unknown	Hispanic	No		
Aliases		Hair	Black		
Height	6' 3"	Eyes	Brown		
Weight	240				
Body Marks	Tattoo of a fish bowl on left forearm.				
- Addresses:** A message stating 'Sorry, there are no addresses for this defendant.' with a '+ Add New Address' link.
- Phone Numbers:** A message stating 'Sorry, there are no phone numbers for this defendant.' with a '+ Add New Phone Number' link.
- Employment:** A message stating 'Sorry, there are no employments for this defendant.' with a '+ Add New Employment' link.
- Associates:** A message stating 'Sorry, there are no associates for this defendant.' with a '+ Add New Associate' link.

ADD A DEFENDANT'S ADDRESS

To Add A Defendant's Address, the user will need to click on "Add New Address" to be brought to the prompt that allows you to add and edit addresses. Once the Edit Address box pops up, the user will fill in the address type, address, city, state, zip and any additional comments. The ability to check the "Verified" box will show that the address was verified. The user will then need to select "Save" to save changes.



The screenshot displays the 'Addresses' section of the CePretrial interface. At the top, a blue header bar contains the text '^ Addresses'. Below this, a message states 'Sorry, there are no addresses for this defendant.' An orange box highlights the '+ Add New Address' button, with an orange arrow pointing to it from the right. Below the message is the 'Edit Address' modal form. An orange arrow points from the left towards the form. The form contains the following fields: 'Type' (a dropdown menu with 'Select One' selected), 'Line 1' (a text input field with the placeholder 'Enter a location'), 'Line 2' (a text input field), 'City' (a text input field), 'State' (a text input field), 'Zip' (a text input field), and 'Comments' (a text area). At the bottom of the form, there is a 'Verified' checkbox and two buttons: 'Save' (highlighted with an orange box and an orange arrow pointing to it from the right) and 'Cancel'.

ADD A DEFENDANT'S PHONE NUMBER

To Add A Defendant's Phone Number, the user will need to click on "Add New Phone Number" to expand the Phone Numbers section that allows the addition of new phone numbers. The user will be able to add the Defendant's phone number, extension, dictate the type of phone number, determine whether the phone has SMS messaging capabilities, and if it is active or an inactive line, as well as the ability to add any additional comments. The user will then need to select "Save" to save the phone number in the application.

^ Phone Numbers

Sorry, there are no phone numbers for this defendant.

[+ Add New Phone Number](#)

^ Phone Numbers

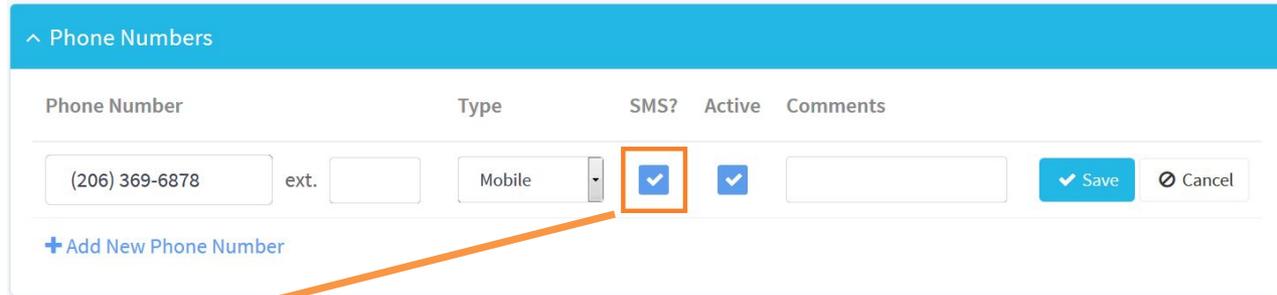
Phone Number	Type	SMS?	Active	Comments
() - - - ext.	Select One	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

[+ Add New Phone Number](#)

[Save](#) [Cancel](#)

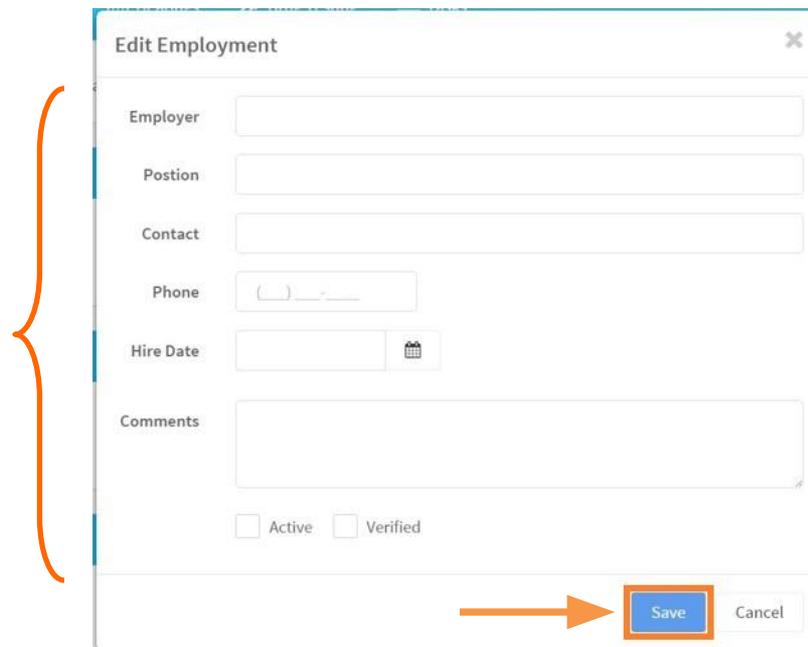


If a defendant's mobile number has been designated as SMS compatible, they can expect to receive notifications from the application when they have a hearing, upcoming contact requirement, and/or drug test. Defendants will be notified two days before a hearing and upcoming contact and one day before a scheduled drug test. *Note: These date ranges are configurable and may vary based on your tenant.*



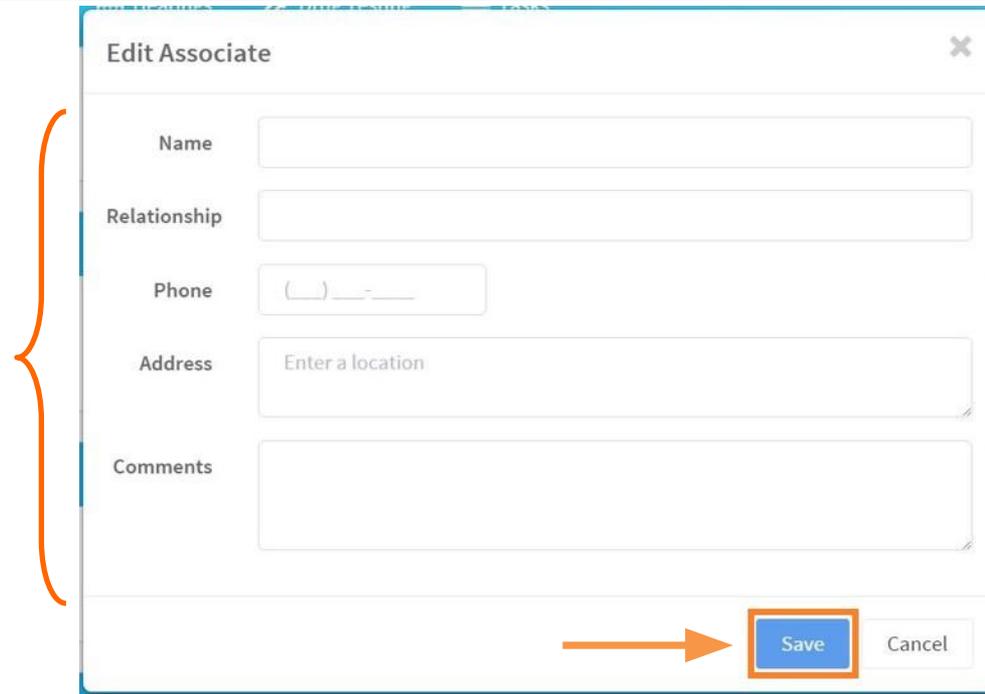
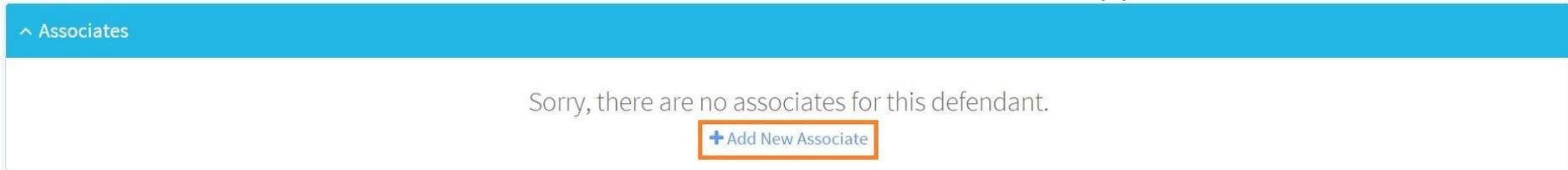
ADD A DEFENDANT'S EMPLOYMENT

To Add A Defendant's Employment, the user will need to click on "Add New Employment" to bring up the prompt that allows the user to add a Defendant's employment. The user will be able to add the Defendant's employer, position, contact, phone number, hire date, any additional comments, and the ability to check whether the employment is active and has been verified. The user will then need to select "Save" to save the employment in the application.

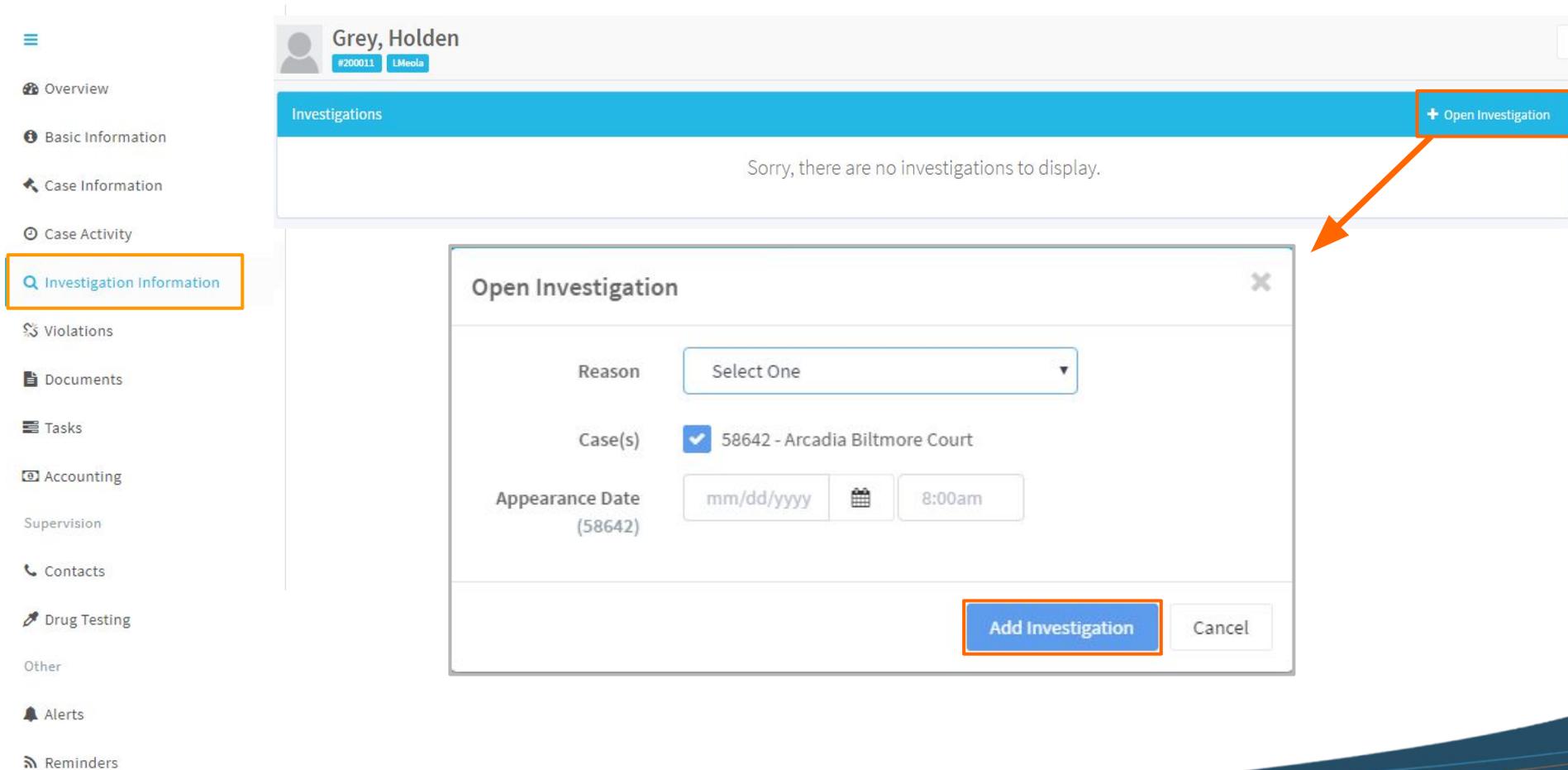
A screenshot of the "Edit Employment" modal form. The form has a title bar with "Edit Employment" and a close button (X). The form contains several input fields: "Employer", "Position", "Contact", "Phone" (with a dropdown for area code), "Hire Date" (with a calendar icon), and "Comments" (a text area). At the bottom of the form, there are two checkboxes: "Active" and "Verified". At the very bottom of the modal, there are two buttons: "Save" and "Cancel". The "Save" button is highlighted with an orange rectangular border, and an orange arrow points to it from the left. A large orange bracket is positioned to the left of the form, spanning from the "Employer" field down to the "Active" and "Verified" checkboxes.

ADD A DEFENDANT'S ASSOCIATES

To Add A Defendant's known Associates, the user will need to click on "Add New Associate" to bring up the prompt that allows the user to add any known associates. The user will be able to add the Associate's name, relationship to the defendant, phone number, address, and any additional comments. The user will then need to select "Save" to save the Associate in the application.

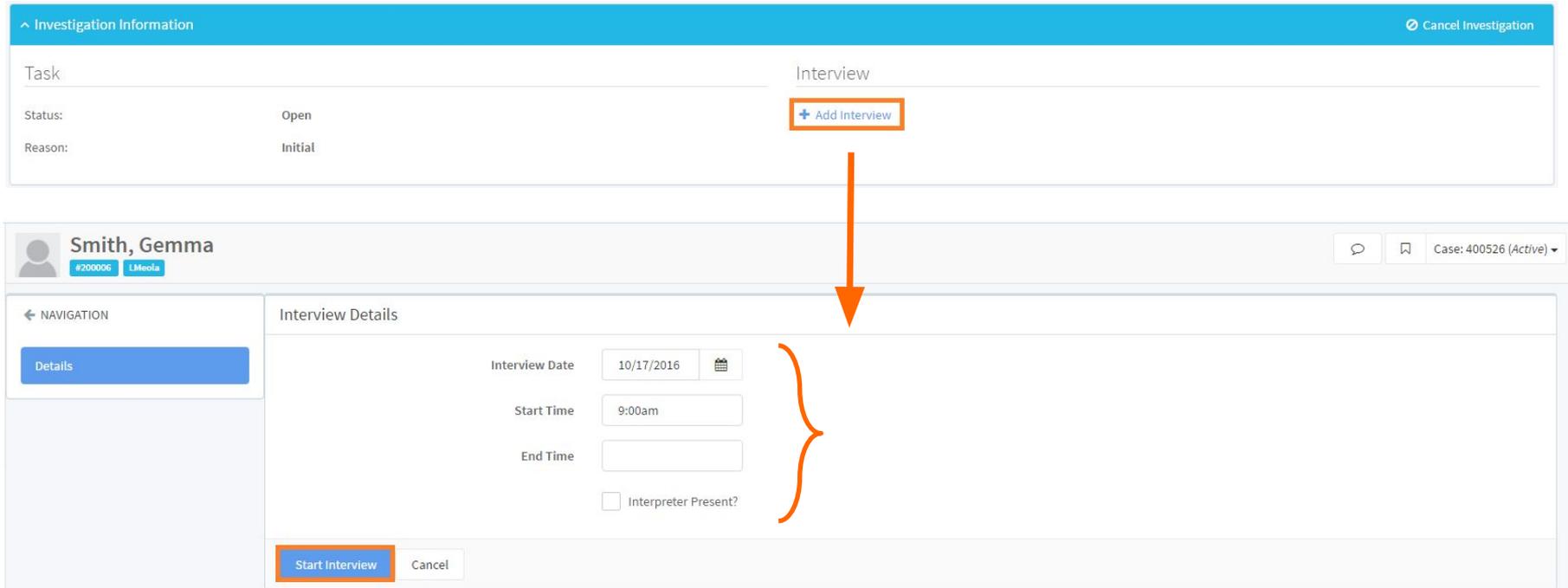


To conduct an investigation on a defendant, the user will select “Investigation Information” from the menu tab. The user will then need to select “Open Investigation” to begin the investigation process. Once the user selects “Open Investigation” they will be navigated to a prompt to dictate the reason, case(s), and appearance date and time before they select “Add Investigation.”



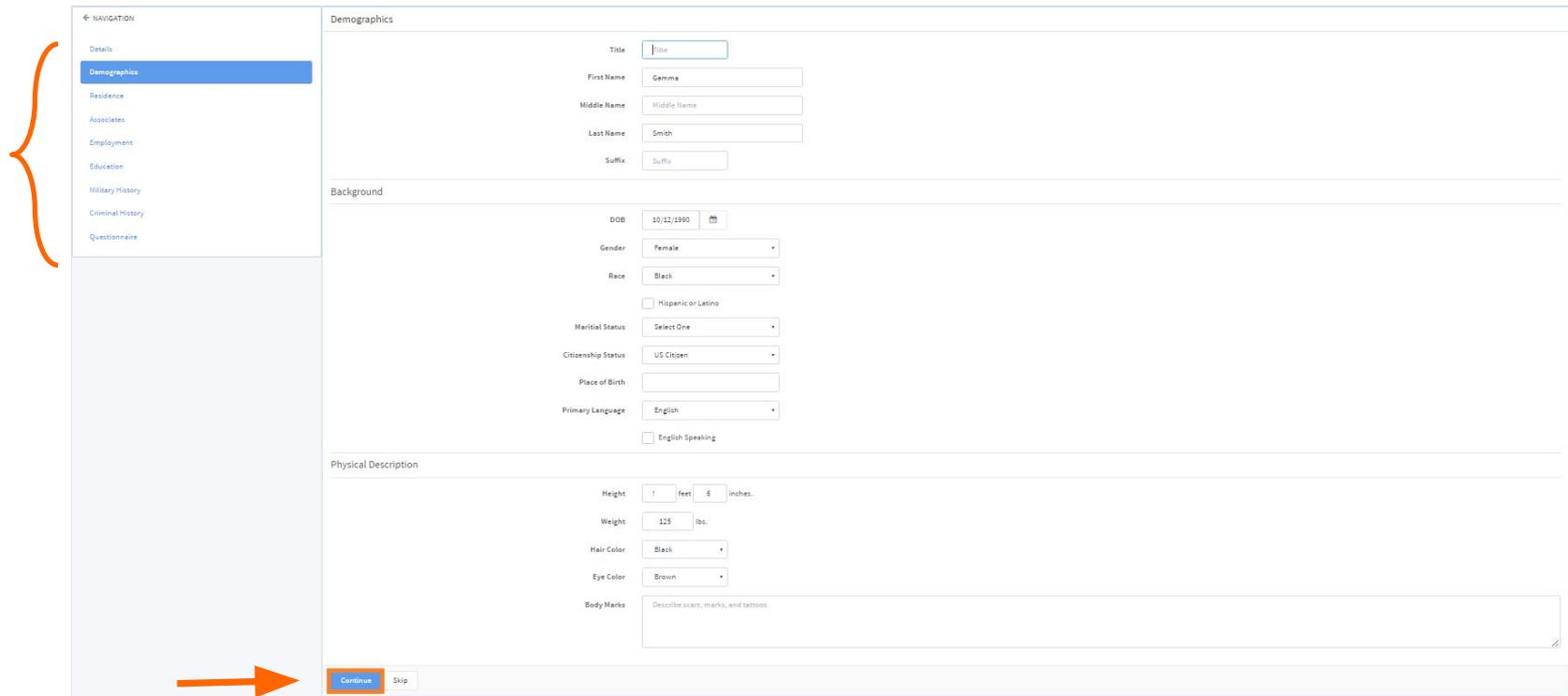
The screenshot displays the CePretrial user interface for a user named Grey, Holden. The left sidebar contains a navigation menu with the following items: Overview, Basic Information, Case Information, Case Activity, Investigation Information (highlighted with an orange box), Violations, Documents, Tasks, Accounting, Supervision, Contacts, Drug Testing, Other, Alerts, and Reminders. The main content area shows the 'Investigations' tab, which is currently empty, displaying the message 'Sorry, there are no investigations to display.' A blue bar at the top right of this section contains a '+ Open Investigation' button, which is also highlighted with an orange box. An orange arrow points from this button to the 'Open Investigation' dialog box. The dialog box has a title bar with 'Open Investigation' and a close button. It contains three input fields: 'Reason' with a dropdown menu set to 'Select One', 'Case(s)' with a checked checkbox and the text '58642 - Arcadia Biltmore Court', and 'Appearance Date (58642)' with a date picker set to 'mm/dd/yyyy' and a time picker set to '8:00am'. At the bottom right of the dialog box, there are two buttons: 'Add Investigation' (highlighted with an orange box) and 'Cancel'.

To conduct an Interview on a Defendant, the User will select “Add Interview” after they open an Investigation. The User will then determine the Interview Date, Start Time, and End Time if desired. To start the Interview, the User will then select “Start Interview.”



The screenshot displays the CePretrial interface. At the top, a blue header bar contains the text "Investigation Information" and a "Cancel Investigation" button. Below this, a form shows the "Task" as "Interview" and the "Status" as "Open". A blue button labeled "+ Add Interview" is highlighted with an orange border. An orange arrow points from this button down to the "Interview Details" section. In this section, the "Interview Date" is set to "10/17/2016", the "Start Time" is "9:00am", and the "End Time" field is empty. A checkbox for "Interpreter Present?" is also visible. A blue button labeled "Start Interview" is highlighted with an orange border at the bottom of the form. A navigation sidebar on the left shows "Details" as the selected option. The user's name "Smith, Gemma" and case number "400526 (Active)" are visible in the top right of the main content area.

Once the User selects “Start Interview,” they will be brought through the workflow of the standard Interview within *Ce Pretrial*.



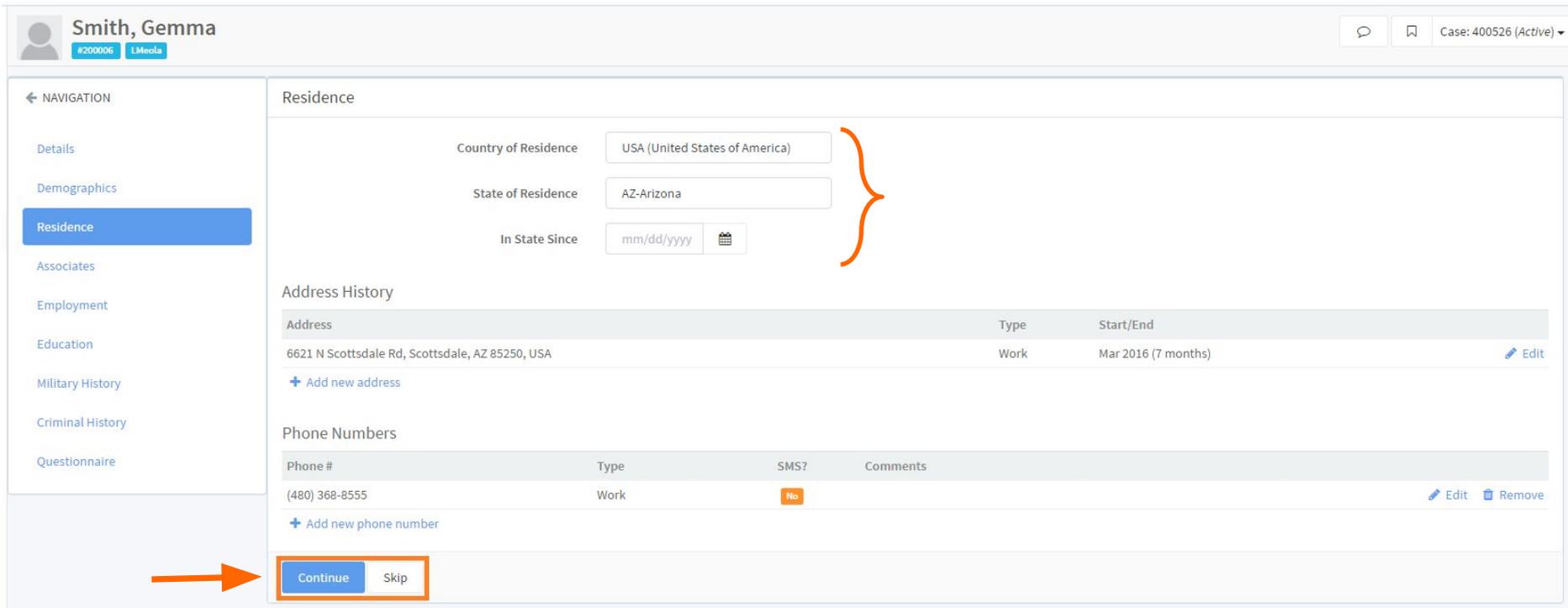
The screenshot displays a web-based interview form with a left-hand navigation menu. The 'Demographics' section is highlighted in blue. The form contains the following fields:

- Demographics:** Title, First Name (Gemma), Middle Name, Last Name (Smith), Suffix.
- Background:** DOB (10/12/1990), Gender (Female), Race (Black), Marital Status (Select One), Citizenship Status (US Citizen), Place of Birth, Primary Language (English).
- Physical Description:** Height (1 feet 6 inches), Weight (125 lbs.), Hair Color (Black), Eye Color (Brown), Body Marks (Describe scars, marks, and tattoos).

An orange arrow points to the 'Continue' button at the bottom left of the form.

Note: Demographic Information on a Defendant will be automatically populated if the User entered it when they added the Defendant into the system. If they are populating the Demographic information for the first time during the Interview, it will pull over to the Defendant record as well.

To enter Residential information, the User has the ability to enter the Country and State of Residence, the duration of time the Defendant has lived in the state, as well as an Address History and Telephone Numbers.



Smith, Gemma
#200006 | Meola

Case: 400526 (Active)

← NAVIGATION

- Details
- Demographics
- Residence**
- Associates
- Employment
- Education
- Military History
- Criminal History
- Questionnaire

Residence

Country of Residence: USA (United States of America)

State of Residence: AZ-Arizona

In State Since: mm/dd/yyyy

Address History

Address	Type	Start/End	
6621 N Scottsdale Rd, Scottsdale, AZ 85250, USA	Work	Mar 2016 (7 months)	Edit

+ Add new address

Phone Numbers

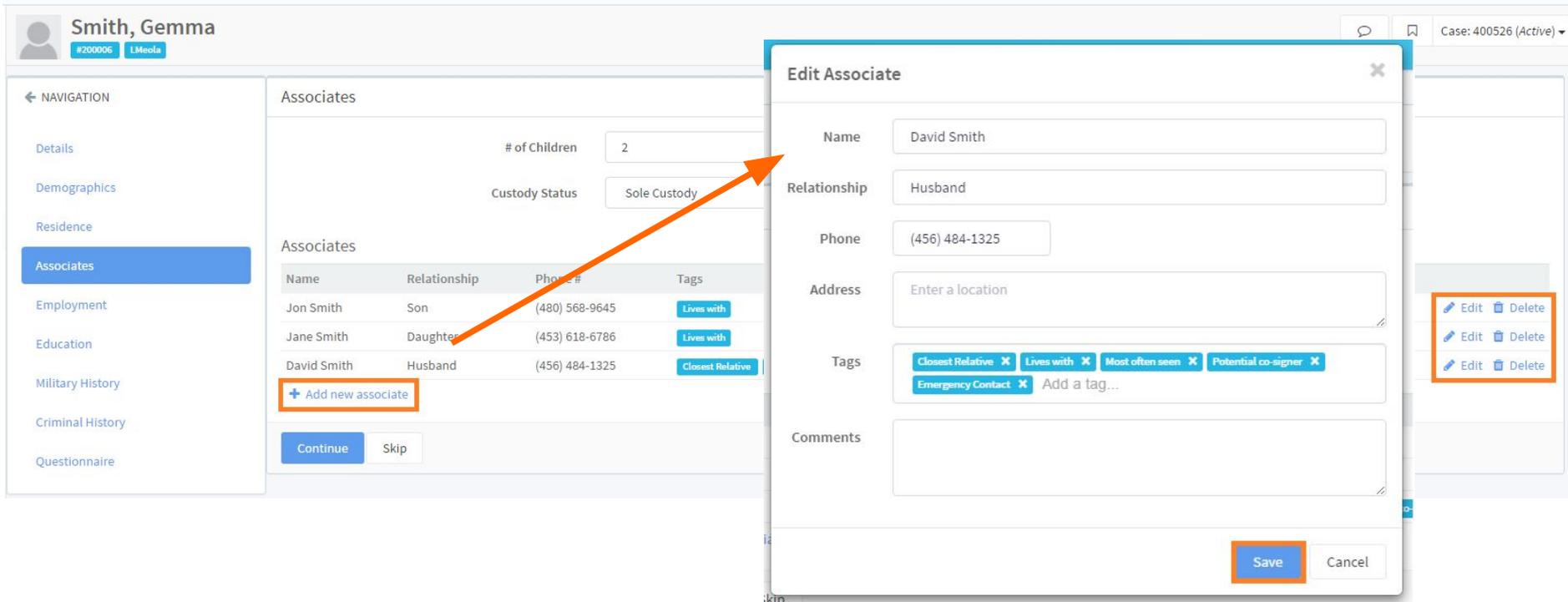
Phone #	Type	SMS?	Comments	
(480) 368-8555	Work	No		Edit Remove

+ Add new phone number

Continue Skip

Note: The User has the option of selecting "Continue" to move through the workflow of an Interview or they can select "Skip" to skip a section and move on. You can also select a different section of the Interview by selecting its tab to move on to that section without

To enter Associate information, the User has the ability to enter the number of children a Defendant has along with the custody status. Associates can be entered by selecting, "Add New Associate." The User will then be prompted to enter the Associate's Name, Relationship, Phone Number, Address, Tags, and any additional comments.



The screenshot displays the 'Edit Associate' modal form. The modal is open over a table of associates. An orange arrow points from the 'Add new associate' button in the table to the 'Name' field in the modal. The modal contains fields for Name, Relationship, Phone, Address, Tags, and Comments. The 'Save' button is highlighted with an orange box.

Name	Relationship	Phone #	Tags
Jon Smith	Son	(480) 568-9645	Lives with
Jane Smith	Daughter	(453) 618-6786	Lives with
David Smith	Husband	(456) 484-1325	Closest Relative

Edit Associate

Name: David Smith

Relationship: Husband

Phone: (456) 484-1325

Address: Enter a location

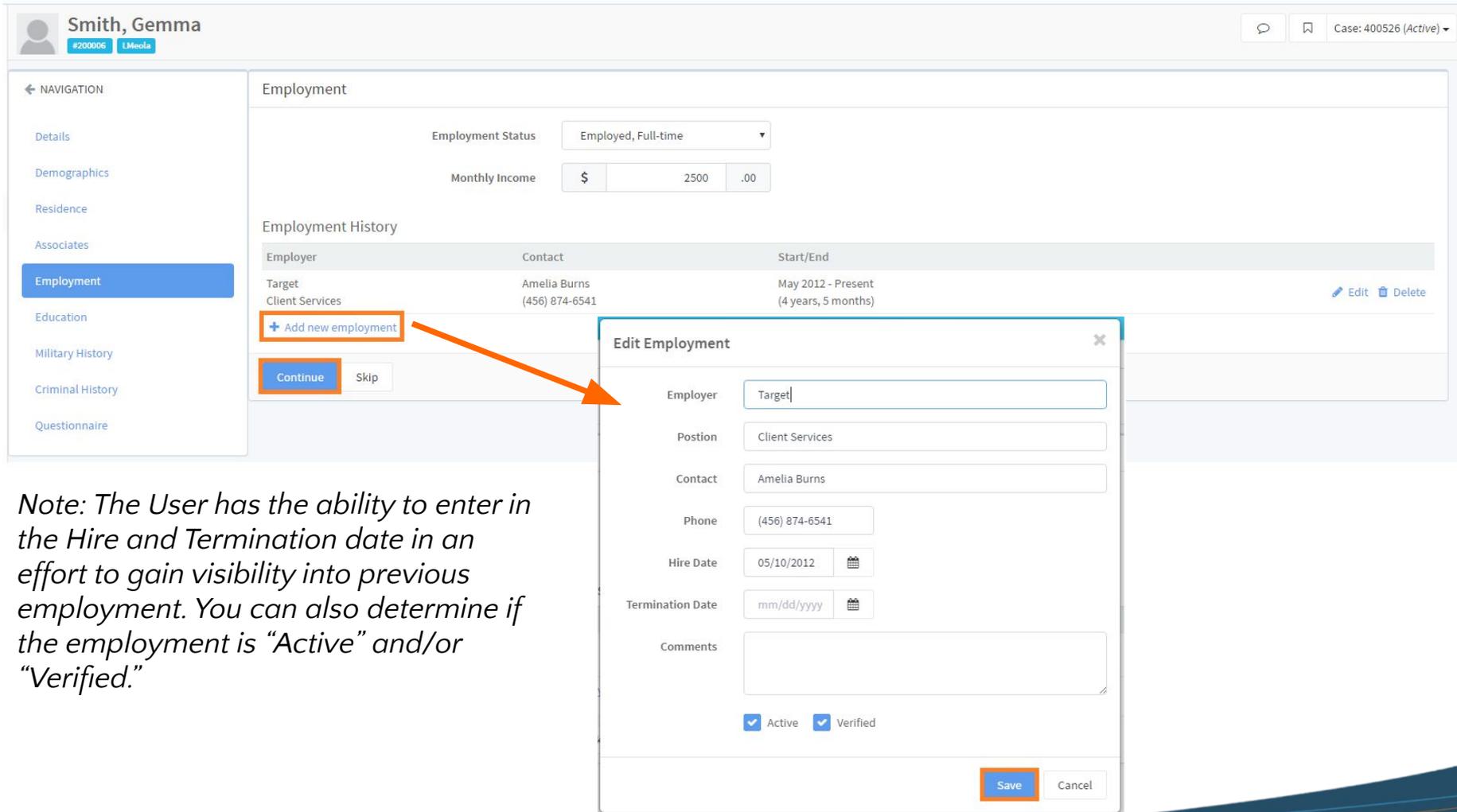
Tags: Closest Relative, Lives with, Most often seen, Potential co-signer, Emergency Contact

Comments:

Save Cancel

Note: Tags can be used to determine the nature of the relationship an Associate has with that particular Defendant.

To enter Employment Information, the User has the option to enter the Defendant's employment status, Monthly Income, and detail Employment under Employment History. To add Employment information, select "Add New Employment," and enter in the necessary information before selecting, "Save."



The screenshot displays the user interface for entering employment information. The top header shows the user's name, "Smith, Gemma", and the case number, "Case: 400526 (Active)". The left sidebar contains navigation options: "Details", "Demographics", "Residence", "Associates", "Employment" (highlighted), "Education", "Military History", "Criminal History", and "Questionnaire".

The main content area is titled "Employment" and includes the following fields:

- Employment Status:
- Monthly Income:

The "Employment History" section contains a table with the following data:

Employer	Contact	Start/End	
Target Client Services	Amelia Burns (456) 874-6541	May 2012 - Present (4 years, 5 months)	Edit Delete

Below the table are two buttons: "Add new employment" (highlighted with an orange box) and "Continue" (highlighted with an orange box). An orange arrow points from the "Add new employment" button to the "Edit Employment" modal window.

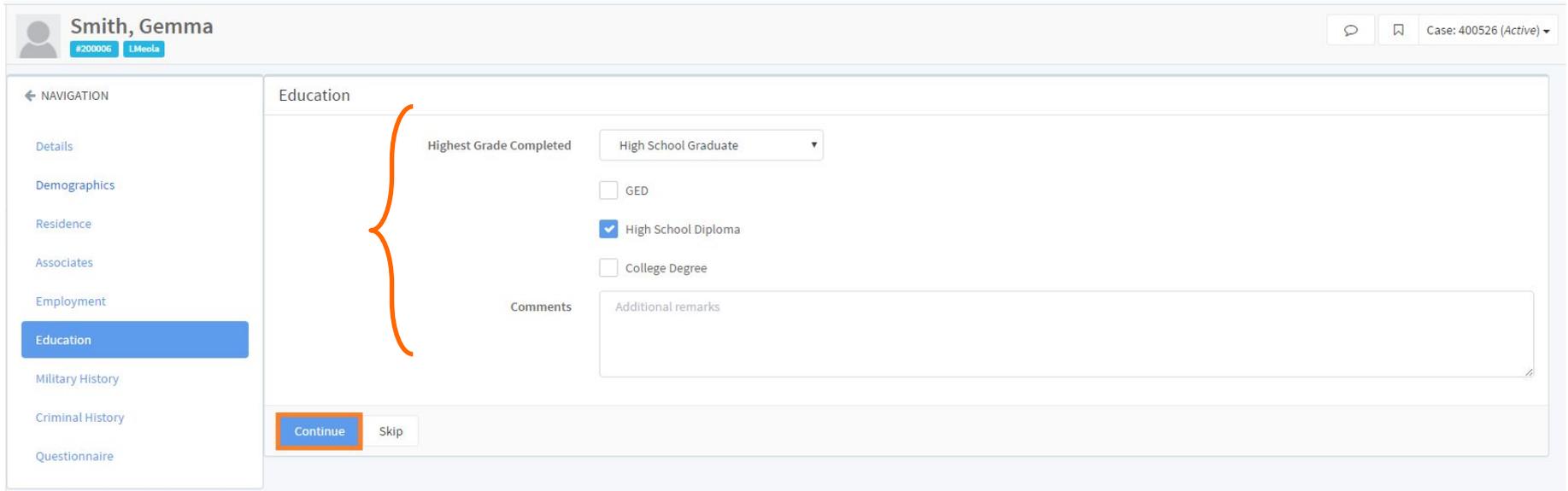
The "Edit Employment" modal window contains the following fields:

- Employer:
- Position:
- Contact:
- Phone:
- Hire Date:
- Termination Date:
- Comments:
- Active Verified

At the bottom of the modal are two buttons: "Save" (highlighted with an orange box) and "Cancel".

Note: The User has the ability to enter in the Hire and Termination date in an effort to gain visibility into previous employment. You can also determine if the employment is "Active" and/or "Verified."

To enter Education Information, the User has the option to enter the Highest Grade Completed, select the highest level of education, and enter any necessary comments.

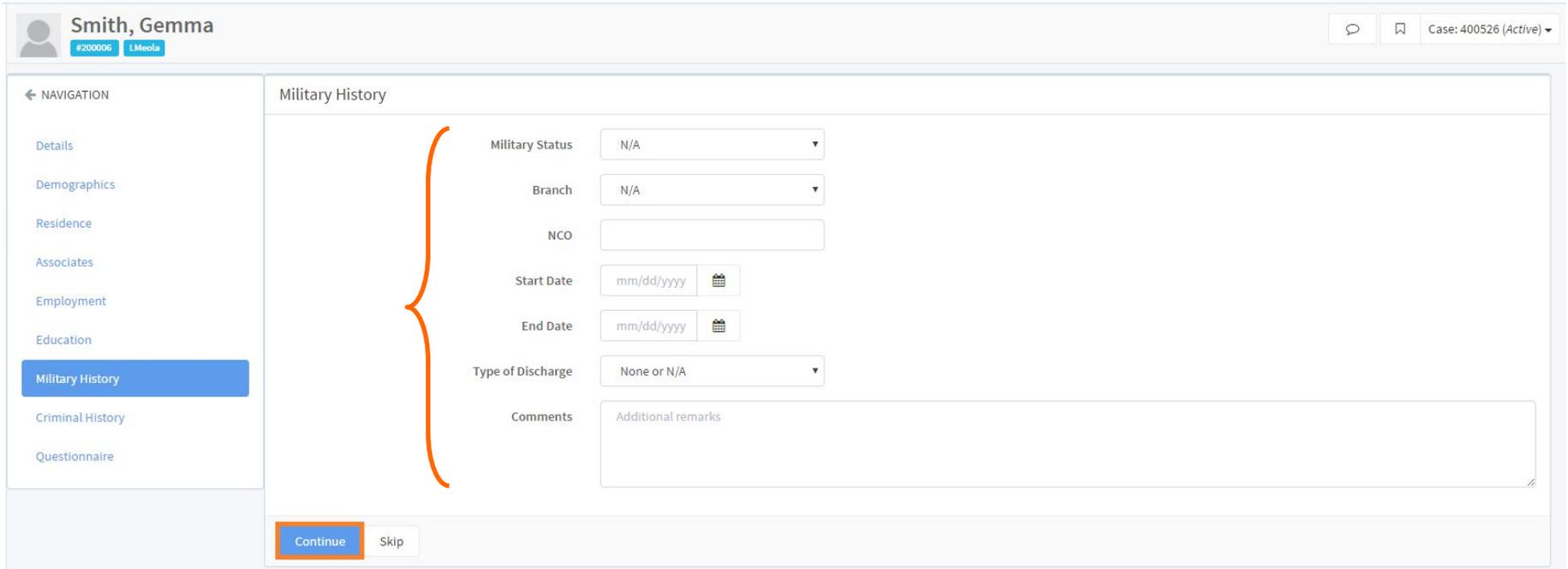


The screenshot shows the 'Education' section of a user profile for Gemma Smith. The interface includes a navigation sidebar on the left with options like Details, Demographics, Residence, Associates, Employment, Education (highlighted), Military History, Criminal History, and Questionnaire. The main form area is titled 'Education' and contains the following fields:

- Highest Grade Completed:** A dropdown menu currently set to 'High School Graduate'.
- GED:** An unchecked checkbox.
- High School Diploma:** A checked checkbox.
- College Degree:** An unchecked checkbox.
- Comments:** A text area labeled 'Additional remarks'.

At the bottom of the form, there are two buttons: 'Continue' (highlighted with an orange border) and 'Skip'.

To enter Military History, the User has the option to enter Military Status, Branch, NCO, Start and End Date, Type of Discharge, and any Comments.

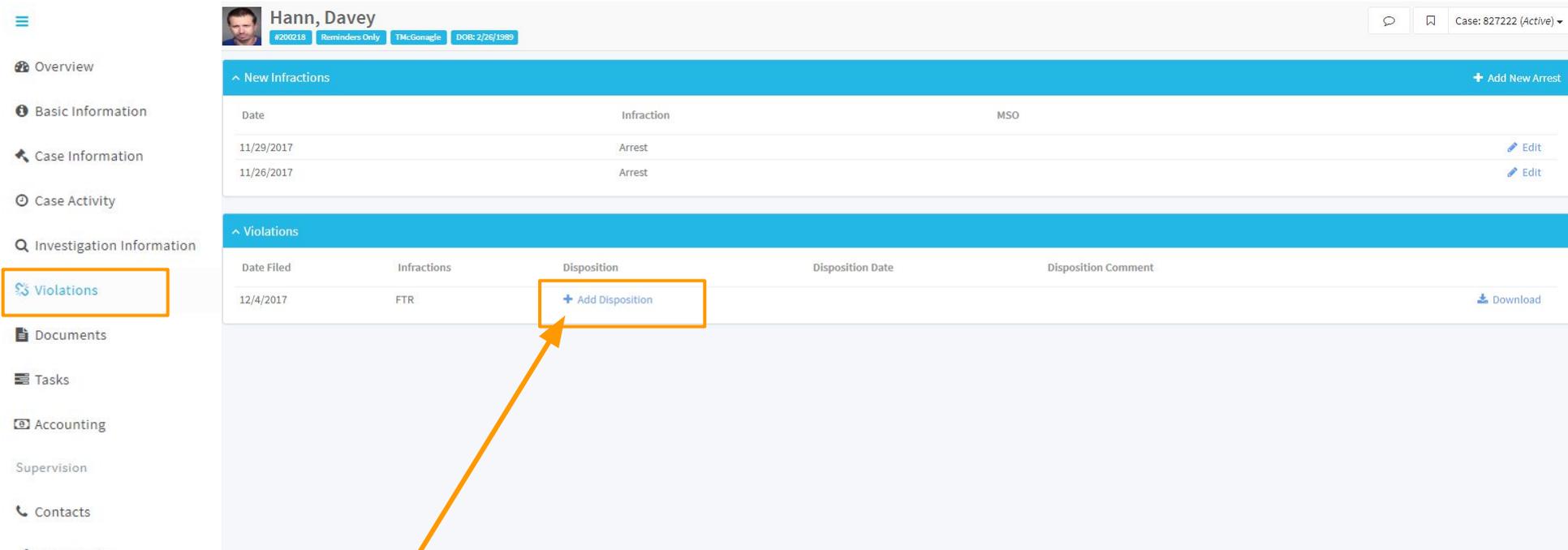


The screenshot shows a user interface for entering military history. The user is identified as Gemma Smith (#200096, LMeola). The case is 400526 (Active). The form is titled "Military History" and includes the following fields:

- Military Status: N/A
- Branch: N/A
- NCO: (empty text field)
- Start Date: mm/dd/yyyy (with calendar icon)
- End Date: mm/dd/yyyy (with calendar icon)
- Type of Discharge: None or N/A
- Comments: Additional remarks (text area)

Navigation options include "Continue" and "Skip". A blue bracket on the left side of the form highlights the Military Status, Branch, NCO, Start Date, and End Date fields.

The Violations tab will record any new infractions for the defendant while under pretrial supervision. Users can also interact with Violations and add disposition outcomes.



Hann, Davey #200218 Reminders Only TMcGonagle DOB: 2/26/1989 Case: 827222 (Active)

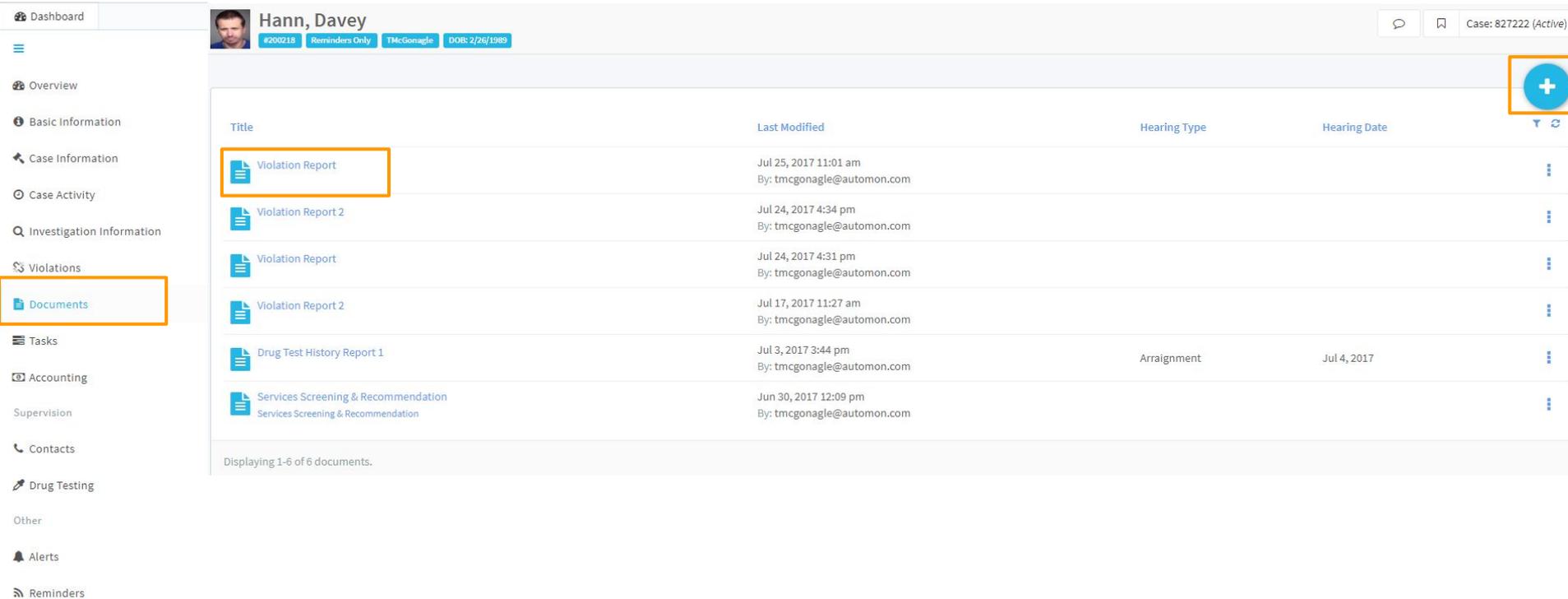
New Infractions + Add New Arrest

Date	Infraction	MSO	
11/29/2017	Arrest		Edit
11/26/2017	Arrest		Edit

Violations

Date Filed	Infractions	Disposition	Disposition Date	Disposition Comment	
12/4/2017	FTR	+ Add Disposition			Download

Documents can be generated and stored in the Documents tab. Users can upload a new document using the “plus” sign in the upper right corner. A user can view a previously saved document by selecting the appropriate blue hyperlinked title.



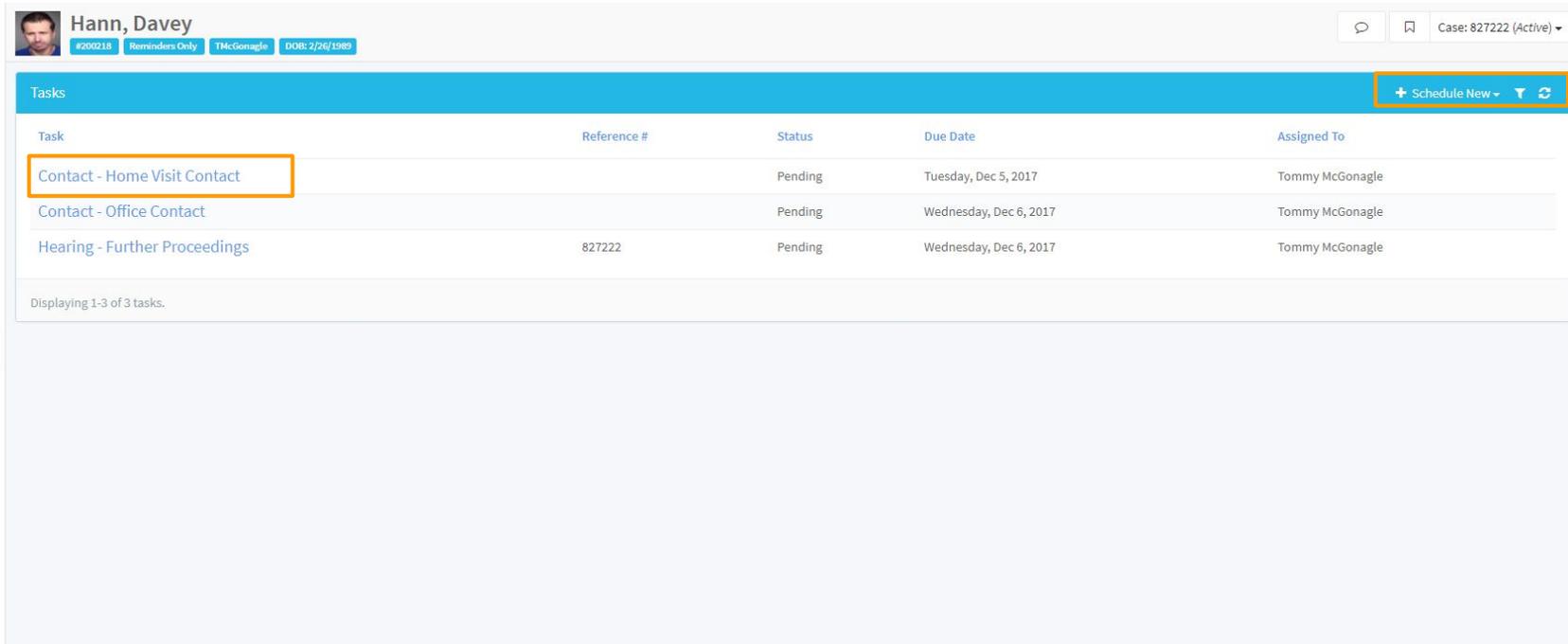
Dashboard | **Hann, Davey** | #200218 Reminders Only TMcGonagle | DOB: 2/26/1989 | Case: 827222 (Active)

- Overview
- Basic Information
- Case Information
- Case Activity
- Investigation Information
- Violations
- Documents**
- Tasks
- Accounting
- Supervision
- Contacts
- Drug Testing
- Other
- Alerts
- Reminders

Title	Last Modified	Hearing Type	Hearing Date
Violation Report	Jul 25, 2017 11:01 am By: tmcgonagle@automon.com		
Violation Report 2	Jul 24, 2017 4:34 pm By: tmcgonagle@automon.com		
Violation Report	Jul 24, 2017 4:31 pm By: tmcgonagle@automon.com		
Violation Report 2	Jul 17, 2017 11:27 am By: tmcgonagle@automon.com		
Drug Test History Report 1	Jul 3, 2017 3:44 pm By: tmcgonagle@automon.com	Arraignment	Jul 4, 2017
Services Screening & Recommendation Services Screening & Recommendation	Jun 30, 2017 12:09 pm By: tmcgonagle@automon.com		

Displaying 1-6 of 6 documents.

The task tab displays all task associated with the participant. A user can complete these task by clicking on the blue hyperlinks. Users can schedule new task, filter the task list and refresh the task list in the top right corner.



The screenshot shows the 'Tasks' tab for participant 'Hann, Davey'. The interface includes a sidebar with navigation options, a header with participant details, and a main table of tasks. The 'Tasks' sidebar item and the first task row are highlighted with orange boxes.

Task	Reference #	Status	Due Date	Assigned To
Contact - Home Visit Contact		Pending	Tuesday, Dec 5, 2017	Tommy McGonagle
Contact - Office Contact		Pending	Wednesday, Dec 6, 2017	Tommy McGonagle
Hearing - Further Proceedings	827222	Pending	Wednesday, Dec 6, 2017	Tommy McGonagle

Displaying 1-3 of 3 tasks.

A User can track and add Obligations, Transactions and Payment History in the Accounting tab. Users can add New Obligations and transactions using the plus signs (+) in the top right corner of each section. A User can also create a payment receipt using the receipt icon on the right side of the payments line.

- Overview
- Basic Information
- Case Information
- Case Activity
- Investigation Information
- Violations
- Documents
- Tasks
- Accounting
- Supervision
- Contacts
- Drug Testing
- Other
- Alerts
- Reminders

Hann, Davey

#200218 Reminders Only TMcGonagle DOB: 2/26/1989

Case: 827222 (Active) ▾

^ Obligations
+ New Obligation

Type	Information	Invoice Schedule	Amount Owed	Balance	Ordered Amount
Drug Testing <small>Created: Jul 17, 2017</small>	Case: 827222	Manual <small>Last Invoice: Jul 17, 2017</small>	\$0.00	\$0.00	
Restitution <small>Start Date: Jul 17, 2017</small>	Case: 827222	Monthly <small>Last Invoice: Oct 17, 2017</small>	\$100.00	\$100.00	\$200.00

^ Transactions
+ Add

Obligation	Date	Type	Debit	Credit	Balance
Restitution	Nov 6, 2017	Payment		\$100.00	\$100.00
Drug Testing	Nov 6, 2017	Payment		\$25.00	\$200.00
Drug Testing	Jul 17, 2017	Invoice	\$25.00		\$225.00
Restitution	Jul 17, 2017	Invoice	\$200.00		\$200.00
Drug Testing	Jul 17, 2017	Payment		\$25.00	\$0.00
Drug Testing	Jul 17, 2017	Invoice	\$25.00		\$25.00

Displaying 1-6 of 6 transactions.

^ Payment History

Payment Method	Amount	Payment Date	Created By	Voided	
Credit Card <small>Reference Number: 827222</small>	\$125.00	Nov 6, 2017	tmcgonagle@automon.com <small>Nov 6, 2017</small>	No	📄

Users can create New Obligations for defendant by selecting “New Obligation” in the upper right corner of the page. Users will then complete the pop up section and click “save changes” in order to finish a New Obligation.



Hann, Davey

#200218 Reminders Only TMCgonagle DOB: 2/26/1989

Case: 827222 (Active) ▾

^ Obligations

Type	Information	Invoice Schedule
Drug Testing	Case: 827222	Manual Last Invoice: Jul 17, 2017
Restitution	Case: 827222	Monthly Last Invoice: Oct 17, 2017

New Obligation ✕

Obligation Type: Restitution ▾

Ordered Amount: \$ 500

Invoice Frequency: Monthly ▾

Frequency Interval: Select Interval ▾

Invoice Amount: \$ 50

Invoice Start Date: 01/04/2018 📅

Description:

Case ID: Select One ▾

Balance	Ordered Amount
\$0.00	
\$100.00	\$200.00
+ Add	
Credit	Balance
\$100.00	\$100.00
\$25.00	\$200.00
	\$225.00
	\$200.00
\$25.00	\$0.00
	\$25.00

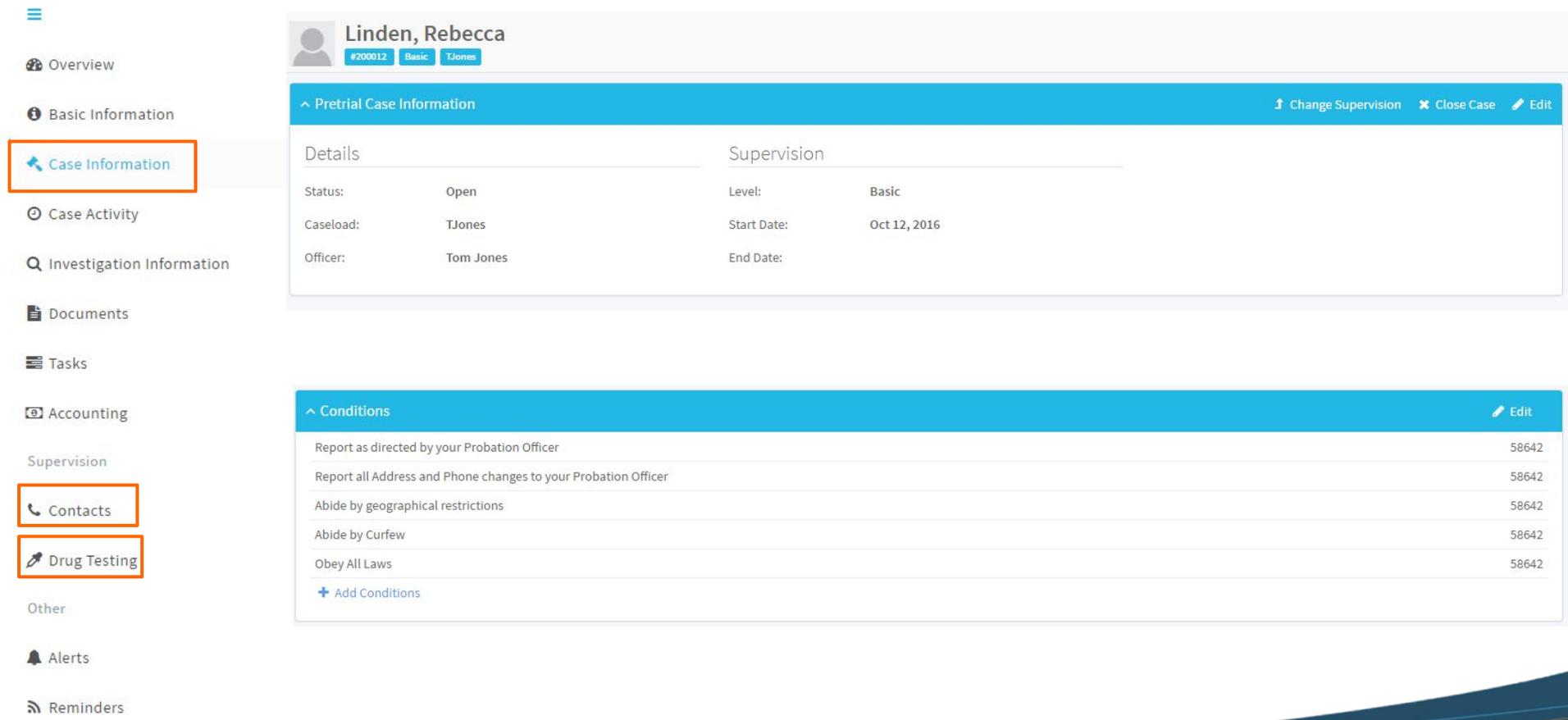
^ Transactions

Obligation	Date	Type
Restitution	Nov 6, 2017	Payment
Drug Testing	Nov 6, 2017	Payment
Drug Testing	Jul 17, 2017	Invoice
Restitution	Jul 17, 2017	Invoice
Drug Testing	Jul 17, 2017	Payment
Drug Testing	Jul 17, 2017	Invoice

Displaying 1-6 of 6 transactions.

^ Payment History

The supervision component can be accessed by clicking on “Case Information.” This will navigate the user to a page where they can view Supervision Information as an overview, change supervision, and add and edit any Conditions. The Contacts tab will allow the user to setup and manage contact requirements. The Drug Testing tab allows the user to schedule and manage drug tests and donor pools.



The screenshot displays the CePretrial interface for a case named "Linden, Rebecca". The left sidebar contains a navigation menu with the following items: Overview, Basic Information, Case Information (highlighted with an orange box), Case Activity, Investigation Information, Documents, Tasks, Accounting, Supervision, Contacts (highlighted with an orange box), Drug Testing (highlighted with an orange box), Other, Alerts, and Reminders.

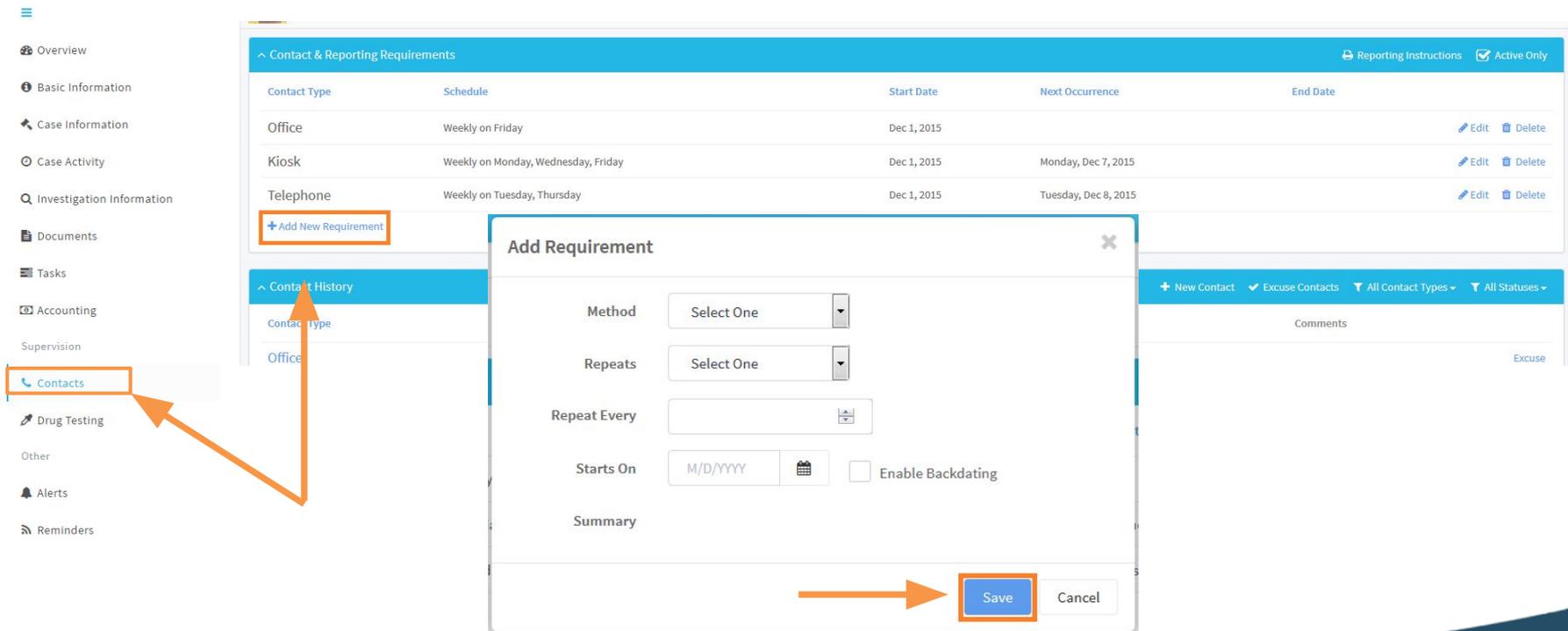
The main content area is titled "Linden, Rebecca" and includes a sub-header "Pretrial Case Information" with action buttons for "Change Supervision", "Close Case", and "Edit". Below this, there are two columns: "Details" and "Supervision".

Details		Supervision	
Status:	Open	Level:	Basic
Caseload:	TJones	Start Date:	Oct 12, 2016
Officer:	Tom Jones	End Date:	

Below the supervision information, there is a "Conditions" section with an "Edit" button. It lists several conditions with associated IDs:

Condition	ID
Report as directed by your Probation Officer	58642
Report all Address and Phone changes to your Probation Officer	58642
Abide by geographical restrictions	58642
Abide by Curfew	58642
Obey All Laws	58642
+ Add Conditions	

To access the Contacts component of supervision, the user will need to select the “Contacts” tab from the menu. To add a Contact & Reporting Requirement, the user will need to click on “Add New Requirement.” Once the prompt pops up, the user is able to select a contact method from the drop down, the options are: the contact types that your agency setup during configuration (i.e. Office Visit, Home Visit, Telephone Reporting, etc.) The user will then determine how often that method of contact should be repeated from the dropdown, the options are: daily, weekly, or monthly. The user then needs to select a start date and select “Save” to save the changes.



The screenshot displays the CePretrial interface. On the left sidebar, the 'Contacts' menu item is highlighted with an orange box and an arrow. The main content area shows a table titled 'Contact & Reporting Requirements' with columns for Contact Type, Schedule, Start Date, Next Occurrence, and End Date. The table lists three entries: Office, Kiosk, and Telephone. The '+ Add New Requirement' button is highlighted with an orange box. A modal form titled 'Add Requirement' is open, showing fields for Method (Select One), Repeats (Select One), Repeat Every, Starts On (M/D/YYYY), and a checkbox for Enable Backdating. The Save button is highlighted with an orange box and an arrow.

Contact Type	Schedule	Start Date	Next Occurrence	End Date
Office	Weekly on Friday	Dec 1, 2015		
Kiosk	Weekly on Monday, Wednesday, Friday	Dec 1, 2015	Monday, Dec 7, 2015	
Telephone	Weekly on Tuesday, Thursday	Dec 1, 2015	Tuesday, Dec 8, 2015	

Add Requirement

Method: Select One

Repeats: Select One

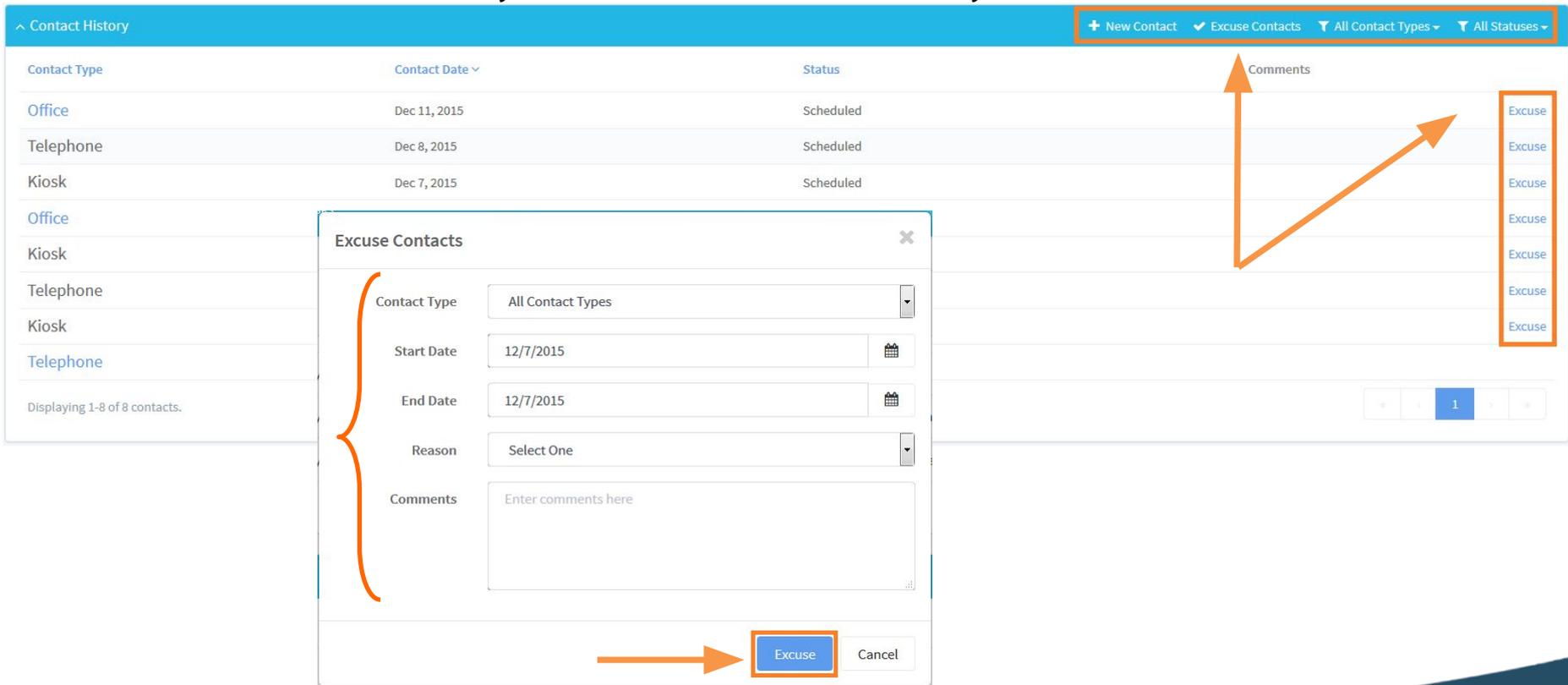
Repeat Every: []

Starts On: M/D/YYYY [] Enable Backdating

Summary

Save Cancel

From the Contacts page the user has the option to excuse contacts individually, by date range, or contact type and the ability to filter by contact type and contact status. To excuse contacts individually, the user will click on “Excuse” to the right of the individual contact type. They will then need to select a reason the contact was excused and enter any additional comments necessary. To excuse by contact type and/or date range, click on “Excuse Contacts” at the top right, then select the contact type and/or date range you wish to be excused. The user will then enter the reason the contact is excused and add any additional comments necessary.



The screenshot displays the 'Contact History' interface. At the top right, there are navigation buttons: '+ New Contact', 'Excuse Contacts', 'All Contact Types', and 'All Statuses'. The main table lists contacts with columns for Contact Type, Contact Date, Status, and Comments. An 'Excuse' button is visible to the right of each row. An orange arrow points from the 'Excuse' button in the table to the 'Excuse Contacts' dialog box. The dialog box contains the following fields:

- Contact Type: All Contact Types
- Start Date: 12/7/2015
- End Date: 12/7/2015
- Reason: Select One
- Comments: Enter comments here

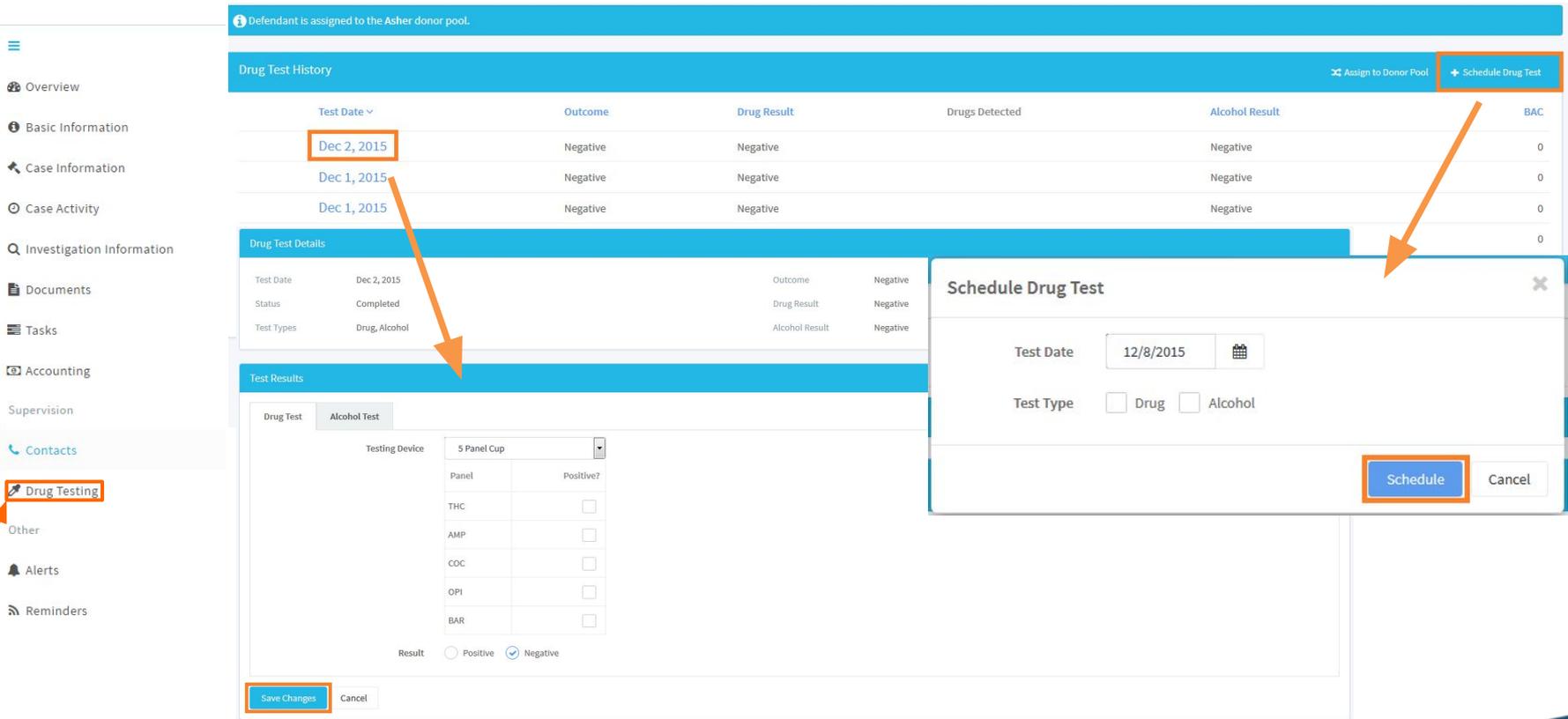
At the bottom of the dialog box, there are two buttons: 'Excuse' and 'Cancel'. An orange arrow points to the 'Excuse' button. The table below the dialog box shows the following data:

Contact Type	Contact Date	Status	Comments
Office	Dec 11, 2015	Scheduled	
Telephone	Dec 8, 2015	Scheduled	
Kiosk	Dec 7, 2015	Scheduled	
Office			
Kiosk			
Telephone			
Kiosk			
Telephone			

At the bottom of the table, it says 'Displaying 1-8 of 8 contacts.' The 'Excuse' button in the table is highlighted with an orange box, and an orange arrow points to it.

SUPERVISION – DRUG TESTING – SCHEDULING AND MANAGING DRUG TESTS

To schedule and manage drug tests, the user must select the “Drug Testing” tab from the Supervision menu. From this screen, the user is able to schedule a drug and/or alcohol test and manage previous drug and/or alcohol tests. To schedule a new drug and/or alcohol test, click on “Schedule Drug Test.” The user must then determine what the test date will be and if drugs and/or alcohol will be tested for. To edit a previous drug test, the user will click on the “Test Date” hyperlink to view the Drug Test Details and have the ability to view and edit the Test Results.



Defendant is assigned to the Asher donor pool.

Drug Test History Assign to Donor Pool Schedule Drug Test

Test Date	Outcome	Drug Result	Drugs Detected	Alcohol Result	BAC
Dec 2, 2015	Negative	Negative		Negative	0
Dec 1, 2015	Negative	Negative		Negative	0
Dec 1, 2015	Negative	Negative		Negative	0

Drug Test Details

Test Date	Dec 2, 2015	Outcome	Negative
Status	Completed	Drug Result	Negative
Test Types	Drug, Alcohol	Alcohol Result	Negative

Test Results

Drug Test | Alcohol Test

Testing Device: 5 Panel Cup

Panel	Positive?
THC	<input type="checkbox"/>
AMP	<input type="checkbox"/>
COC	<input type="checkbox"/>
OPI	<input type="checkbox"/>
BAR	<input type="checkbox"/>

Result: Positive Negative

Schedule Drug Test

Test Date: 12/8/2015

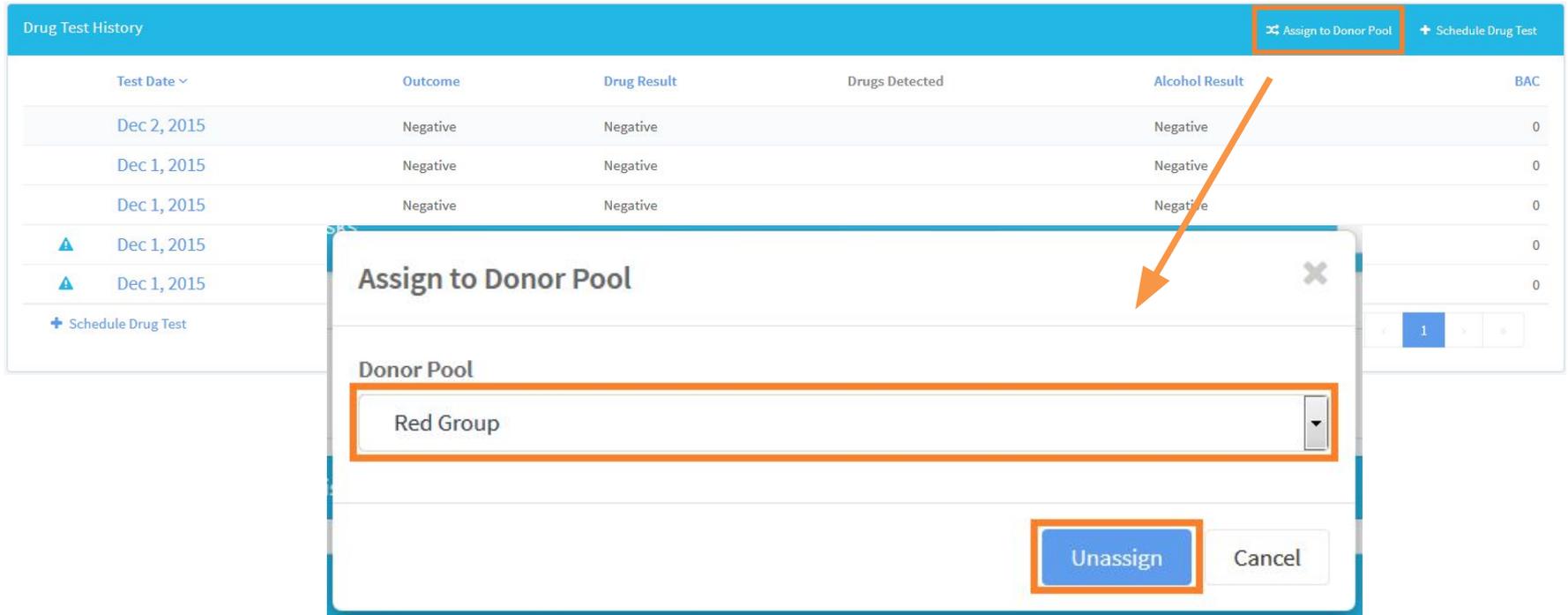
Test Type: Drug Alcohol

Schedule **Cancel**

Save Changes **Cancel**

SUPERVISION – DRUG TESTING – ASSIGNING A DEFENDANT TO A DONOR POOL

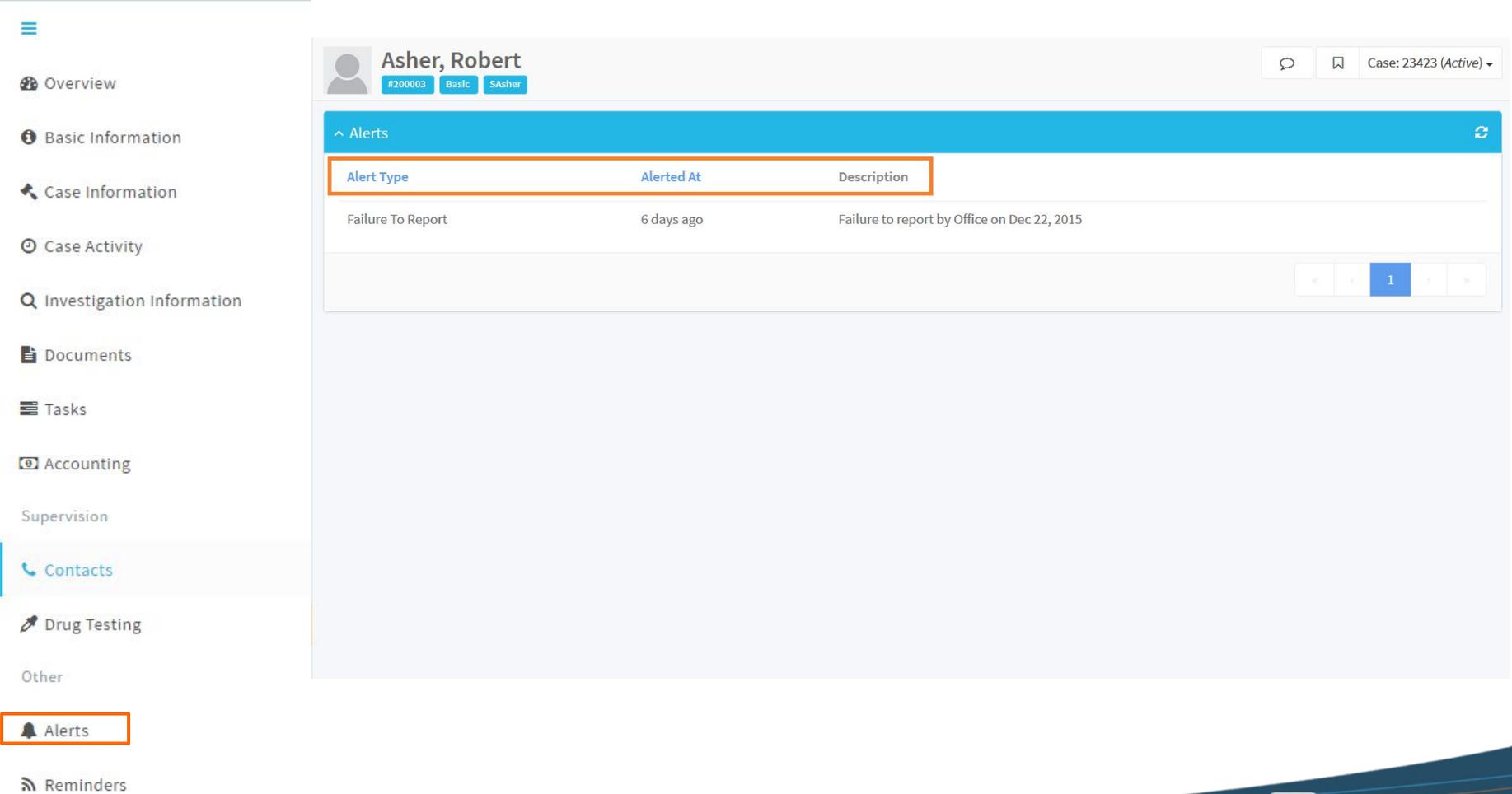
To assign a defendant to a donor pool, the user will select “Assign to Donor Pool” at the top right of the Drug Test History dialog. The user will then be navigated to a prompt that allows you to assign the user to a donor pool from the pick list. Once you have selected the donor pool you want the defendant to be in, click on the “Assign” button to save the changes.



The screenshot shows the 'Drug Test History' interface. At the top right, there is a button labeled 'Assign to Donor Pool' and another labeled '+ Schedule Drug Test'. Below this is a table with columns: Test Date, Outcome, Drug Result, Drugs Detected, Alcohol Result, and BAC. The table contains several rows of data, all with 'Negative' results. An orange arrow points from the 'Assign to Donor Pool' button to a modal dialog box titled 'Assign to Donor Pool'. Inside this dialog, there is a dropdown menu for 'Donor Pool' with 'Red Group' selected. At the bottom of the dialog, there are two buttons: 'Unassign' and 'Cancel'.

Test Date	Outcome	Drug Result	Drugs Detected	Alcohol Result	BAC
Dec 2, 2015	Negative	Negative		Negative	0
Dec 1, 2015	Negative	Negative		Negative	0
Dec 1, 2015	Negative	Negative		Negative	0
Dec 1, 2015					0
Dec 1, 2015					0

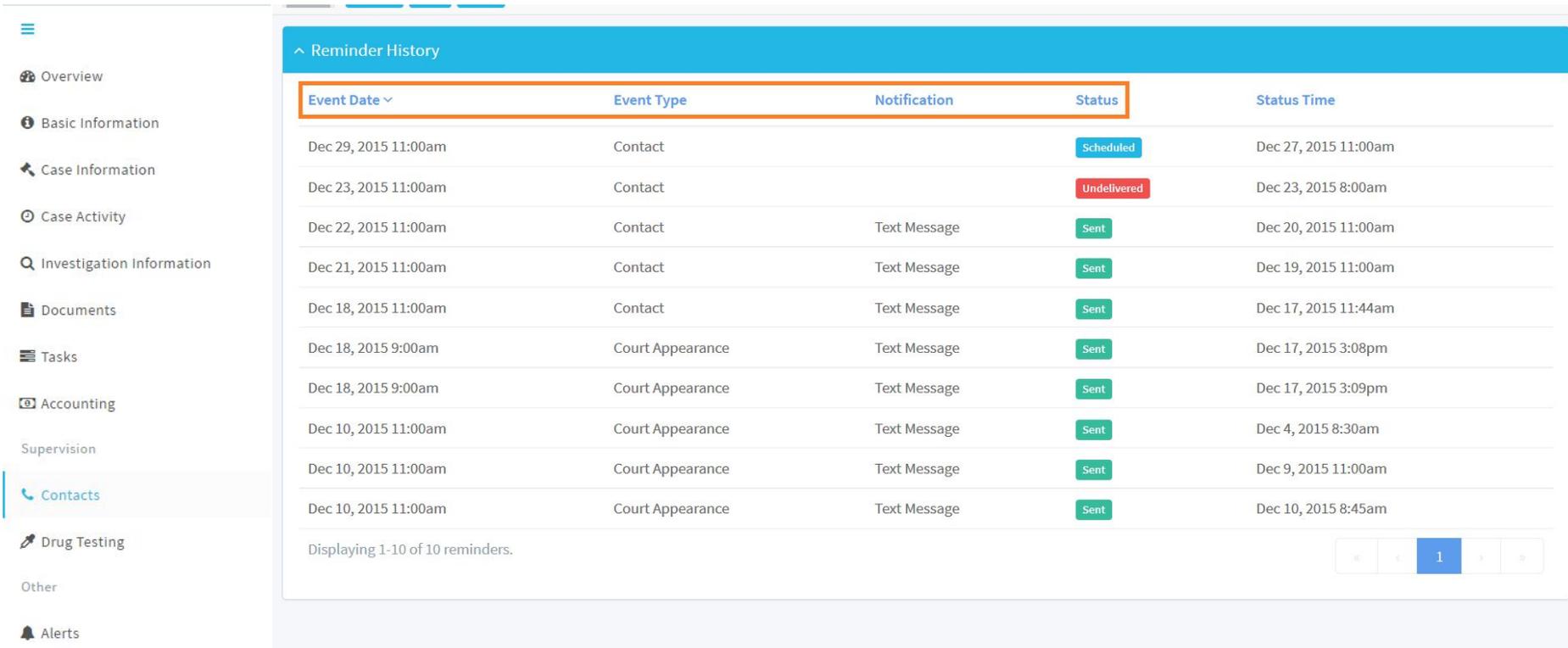
To view alerts related to a particular defendant, the user can select “Alerts” from the defendant menu. Alerts will populate based on the defendant selected and are organized by alert type, when the officer was alerted, and the description.



The screenshot displays the CePretrial interface for a defendant named Robert Asher. The left sidebar contains a navigation menu with the following items: Overview, Basic Information, Case Information, Case Activity, Investigation Information, Documents, Tasks, Accounting, Supervision, Contacts, Drug Testing, Other, Alerts, and Reminders. The 'Alerts' item is highlighted with an orange border. The main content area shows the profile for Robert Asher (ID #200003, Basic, SAsher) and a table of alerts. The table has three columns: Alert Type, Alerted At, and Description. One alert is listed: Failure To Report, alerted 6 days ago, with a description of 'Failure to report by Office on Dec 22, 2015'. A pagination bar at the bottom of the table shows '1' of 1 items.

Alert Type	Alerted At	Description
Failure To Report	6 days ago	Failure to report by Office on Dec 22, 2015

To view the Reminder History on a defendant, the user will select “Reminders” from the defendant menu. The Reminders screen will display all times a defendant was notified of an upcoming hearing, contact requirement, or drug test. The reminders will be organized by event date, event type, notification, status, and status time.



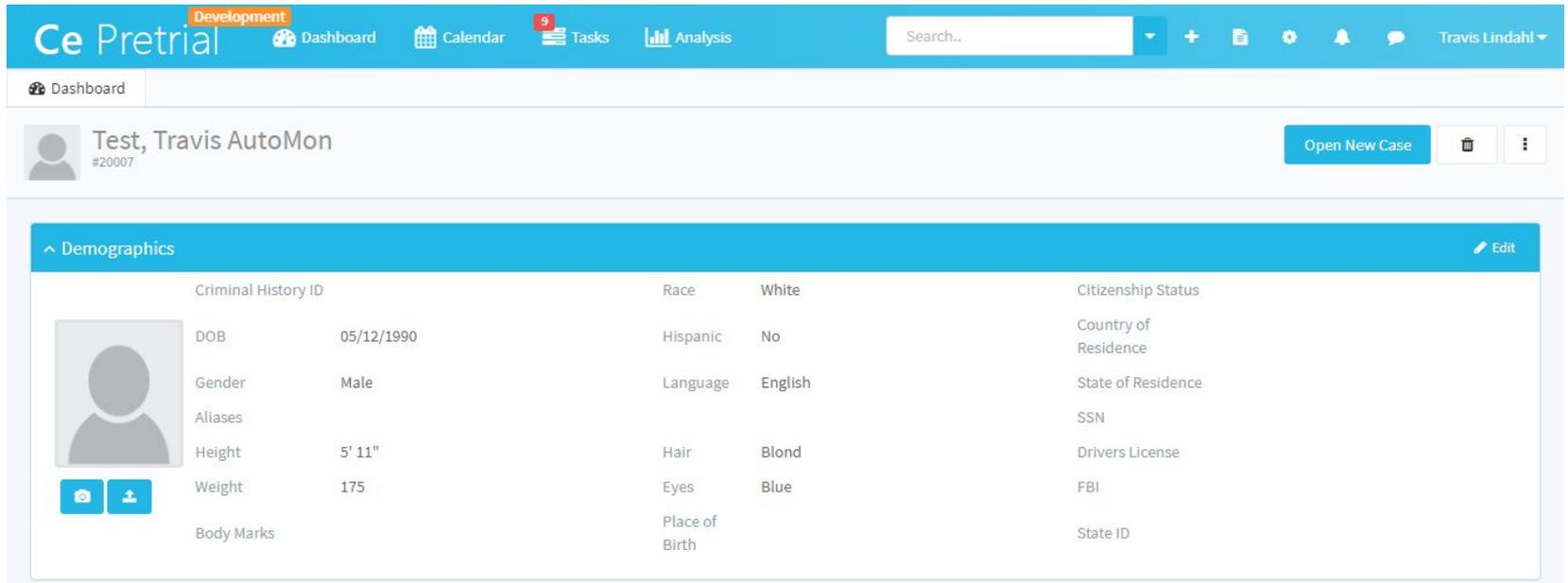
The screenshot shows the 'Reminder History' section of the CePretrial application. On the left is a navigation menu with 'Reminders' highlighted. The main area displays a table with the following columns: Event Date, Event Type, Notification, Status, and Status Time. The table contains 10 rows of data, with the first row being 'Scheduled' and the second row being 'Undelivered'. A pagination bar at the bottom indicates 'Displaying 1-10 of 10 reminders'.

Event Date	Event Type	Notification	Status	Status Time
Dec 29, 2015 11:00am	Contact		Scheduled	Dec 27, 2015 11:00am
Dec 23, 2015 11:00am	Contact		Undelivered	Dec 23, 2015 8:00am
Dec 22, 2015 11:00am	Contact	Text Message	Sent	Dec 20, 2015 11:00am
Dec 21, 2015 11:00am	Contact	Text Message	Sent	Dec 19, 2015 11:00am
Dec 18, 2015 11:00am	Contact	Text Message	Sent	Dec 17, 2015 11:44am
Dec 18, 2015 9:00am	Court Appearance	Text Message	Sent	Dec 17, 2015 3:08pm
Dec 18, 2015 9:00am	Court Appearance	Text Message	Sent	Dec 17, 2015 3:09pm
Dec 10, 2015 11:00am	Court Appearance	Text Message	Sent	Dec 4, 2015 8:30am
Dec 10, 2015 11:00am	Court Appearance	Text Message	Sent	Dec 9, 2015 11:00am
Dec 10, 2015 11:00am	Court Appearance	Text Message	Sent	Dec 10, 2015 8:45am

Subtopics:

1. Merging Defendants Overview
2. Merging Defendants
3. Switching the Source and Destination

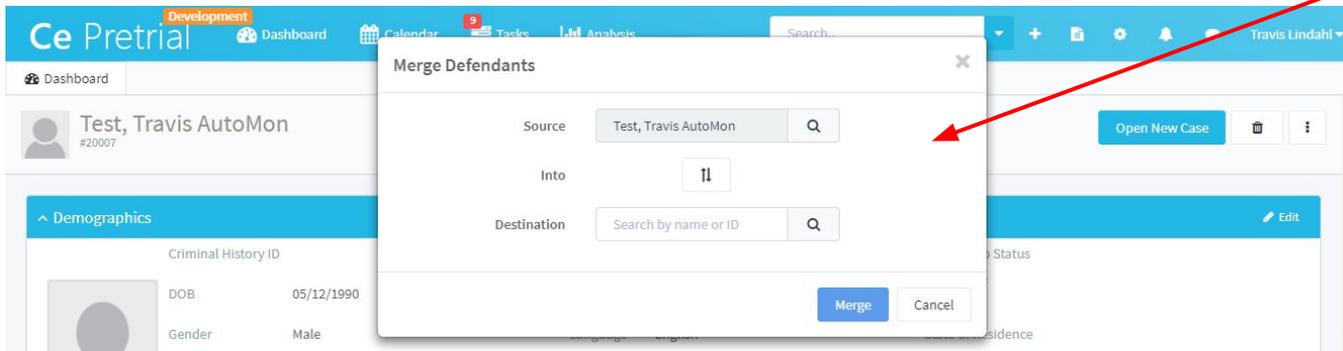
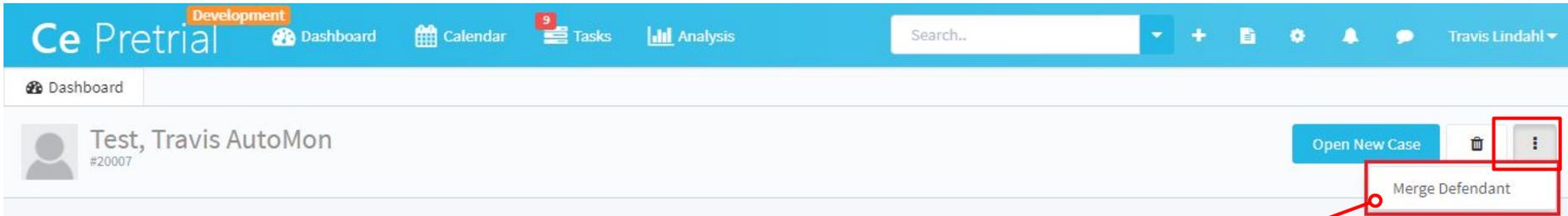
Merging defendants can be used to merge data from a source defendant to a separate destination defendant, while deleting the source defendant in the process. Data that will merge over includes Pretrial Cases, Addresses, Phone Numbers, Employment Info, Associate Info, Military Info, Criminal History, Existing Aliases, Investigations, Biometric Scans, Messages, and a new alias will be created for the source defendant's name. Only system administrators can complete this merge, and there is a record of the merge stored in the database for auditing purposes.



The screenshot shows the CePretrial application interface. At the top, there is a navigation bar with the CePretrial logo, a 'Development' status indicator, and menu items for Dashboard, Calendar, Tasks, and Analysis. A search bar and user profile 'Travis Lindahl' are also present. Below the navigation bar, the user profile for 'Test, Travis AutoMon' (#20007) is displayed, including an 'Open New Case' button and a trash icon. The main content area shows the 'Demographics' section for this defendant, which includes a profile picture and a table of personal information.

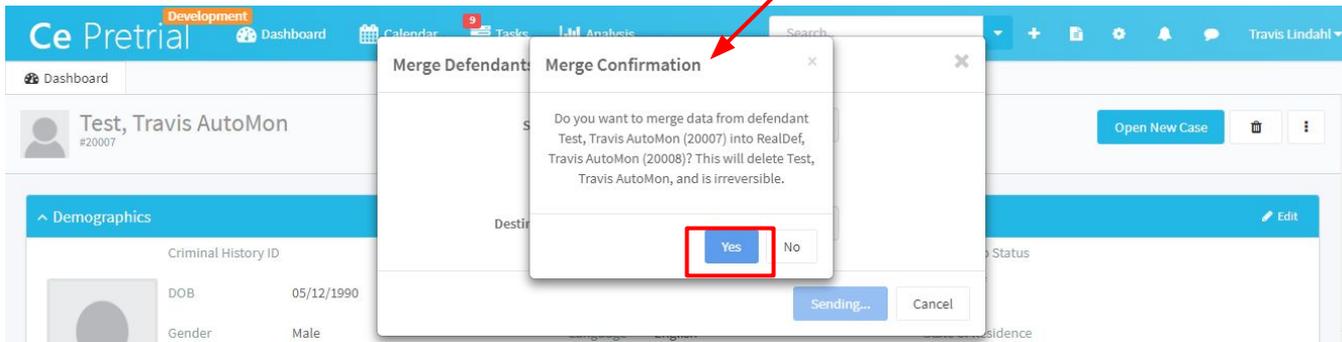
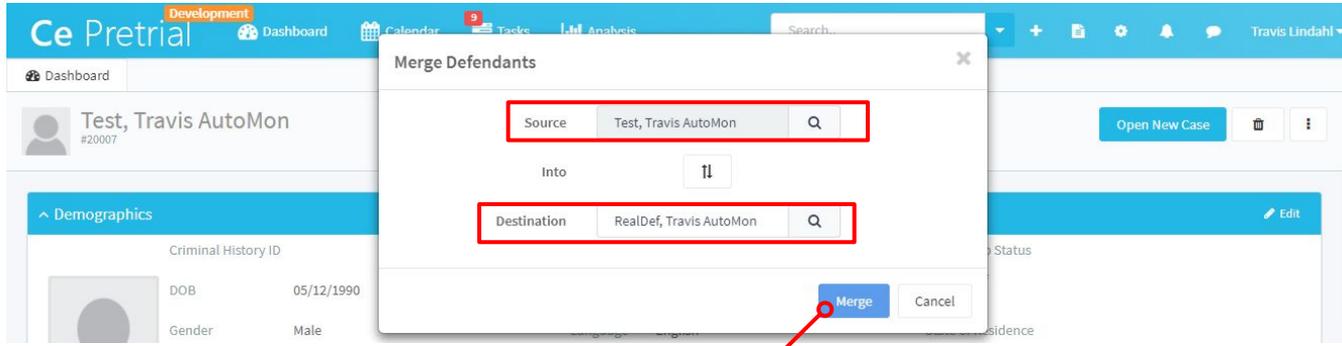
Demographics		Edit		
Criminal History ID		Race	White	Citizenship Status
DOB	05/12/1990	Hispanic	No	Country of Residence
Gender	Male	Language	English	State of Residence
Aliases				SSN
Height	5' 11"	Hair	Blond	Drivers License
Weight	175	Eyes	Blue	FBI
Body Marks		Place of Birth		State ID

Without a Pretrial Case, we are taken directly to the defendant overview rather than a Pretrial Case overview. As an administrator, click the ellipsis icon in the top right corner of the overview. Then Users should select “Merge Defendant” from the drop-down opening the Merge Defendants dialog.



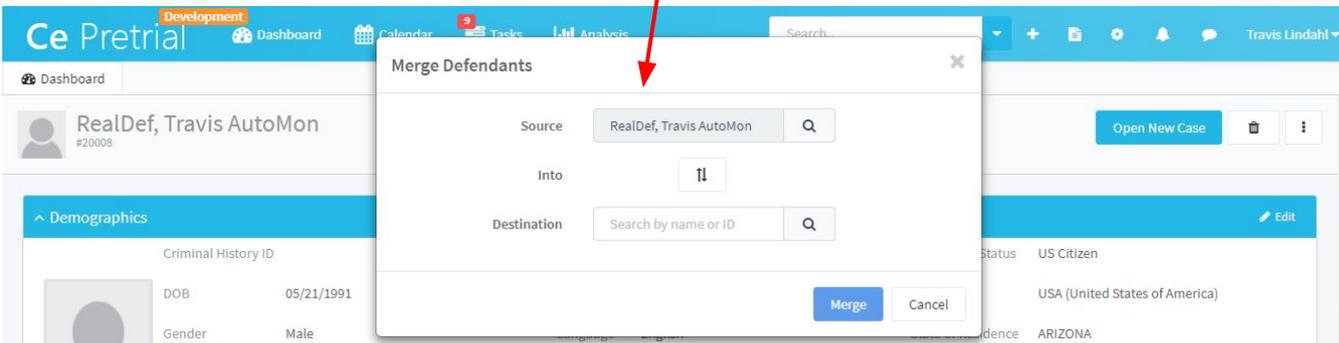
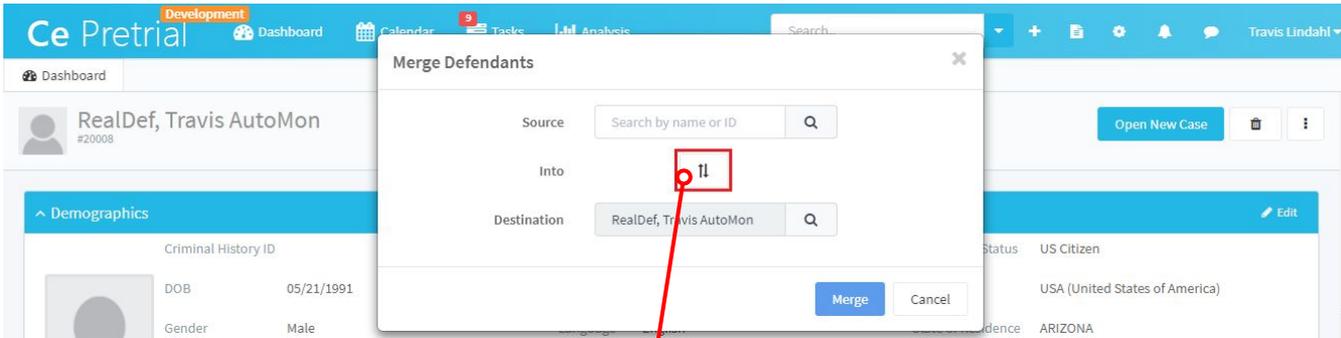
MERGING DEFENDANTS CONTINUED

Users should fill out the source and destination sections and then click “Merge”. Users will be prompted to confirm their Merge. Once Users select “Yes” the Merge will be completed and the Users will be directed to the destination defendants overview and the source defendant’s profile will have been deleted.



SWITCHING THE SOURCE AND DESTINATION

Once in the Merge Defendant dialog, we can use the swap button to switch which defendant will be the source defendant and be deleted, and which defendant will be the destination defendant. This can be used if you are starting on the defendant that you wish to keep rather than the one you wish to delete.

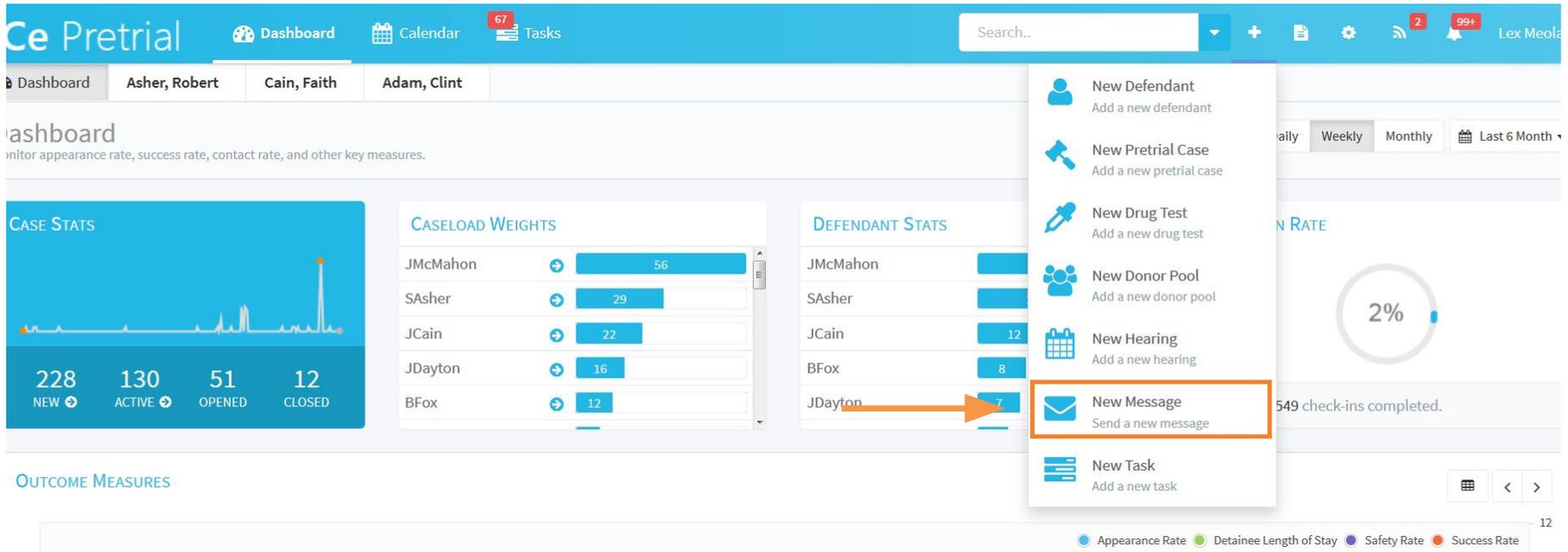


Subtopics:

1. Navigate to New Message
2. Create and Send Message

NAVIGATE TO NEW MESSAGE

To create a New Message to a Defendant, the user should click on the Plus Sign Icon and select “New Message” from the drop-down menu. *Note: Messages to defendants can only be received through a kiosk or web check-in.*



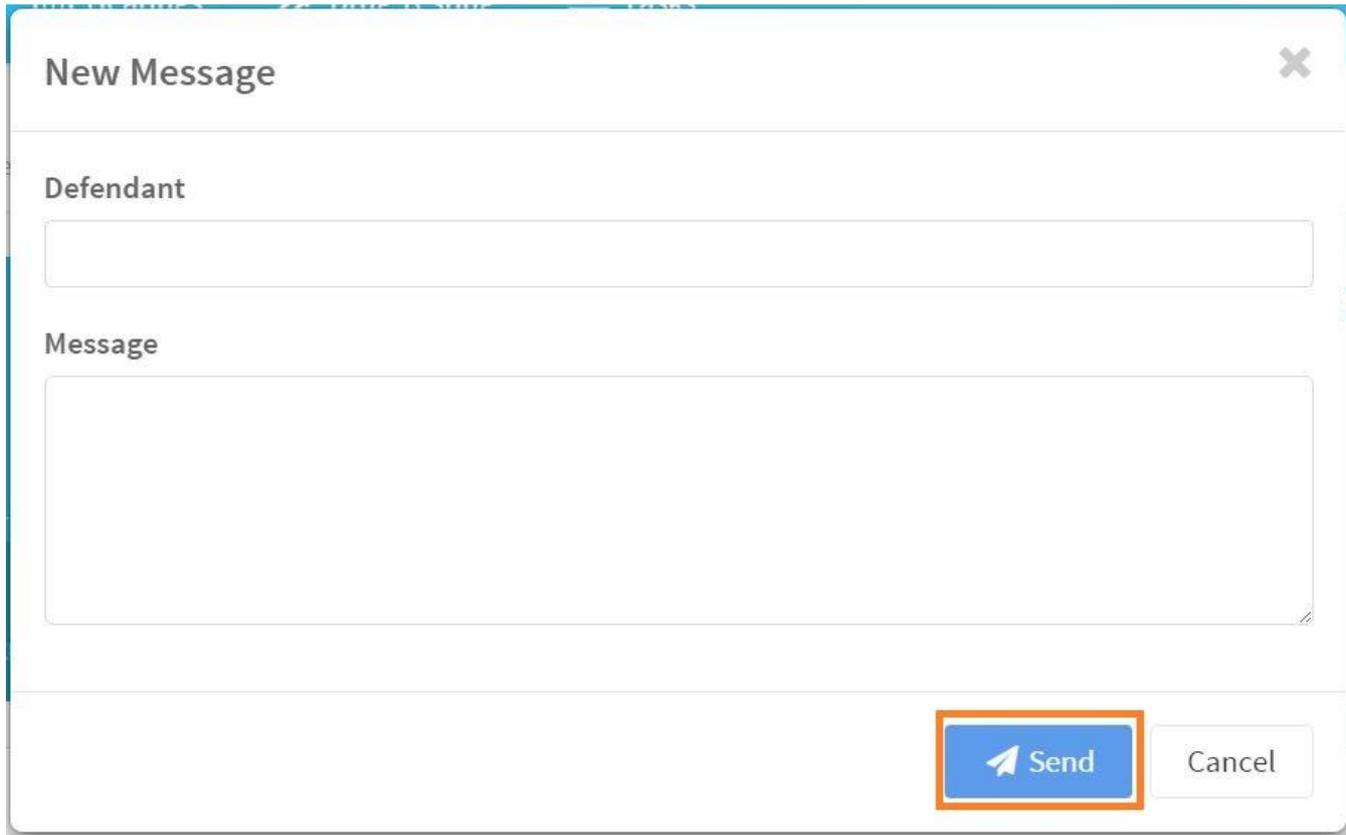
The screenshot displays the CePretrial dashboard interface. At the top, there is a navigation bar with 'Dashboard', 'Calendar', and 'Tasks' (67) icons. A search bar and utility icons are also present. Below the navigation bar, the dashboard is divided into several sections: 'Dashboard' with tabs for 'Asher, Robert', 'Cain, Faith', and 'Adam, Clint'; 'Case Stats' with a line graph and four metrics (228 NEW, 130 ACTIVE, 51 OPENED, 12 CLOSED); 'CaseLoad Weights' table; 'Defendant Stats' table; and 'Outcome Measures' at the bottom. A dropdown menu is open over the 'Defendant Stats' table, listing options: 'New Defendant', 'New Pretrial Case', 'New Drug Test', 'New Donor Pool', 'New Hearing', 'New Message' (highlighted with an orange border and an orange arrow pointing to the 'JDayton' row), and 'New Task'. A legend at the bottom right identifies metrics: Appearance Rate (blue), Detainee Length of Stay (green), Safety Rate (purple), and Success Rate (red).

CaseLoad Weights	Value
JMcMahon	56
SAsher	29
JCain	22
JDayton	16
BFox	12

Defendant Stats	Value
JMcMahon	56
SAsher	29
JCain	22
BFox	8
JDayton	7

CREATE AND SEND MESSAGE

Once “New Message” has been selected, the user must enter the defendant they want to receive the message. The user will then create the message they want the defendant to receive and press send. *Note: Messages to defendants can only be received through a kiosk or web check-in.*

A screenshot of a "New Message" dialog box. The dialog has a title bar with "New Message" and a close button (X). Below the title bar, there are two input fields: "Defendant" (a single-line text box) and "Message" (a multi-line text area). At the bottom right, there are two buttons: "Send" (a blue button with a white paper plane icon) and "Cancel" (a white button with a grey border). An orange bracket on the left side of the dialog encompasses the "Defendant" and "Message" fields. The "Send" button is also highlighted with an orange border.

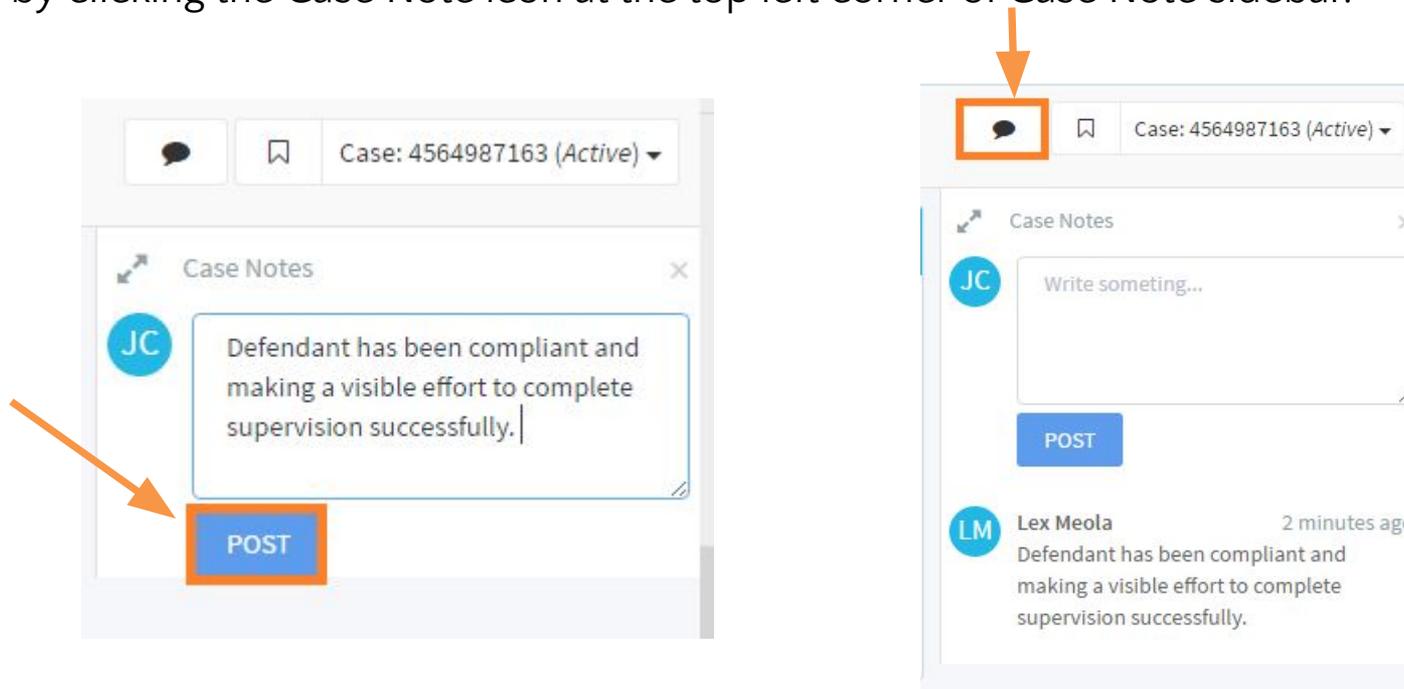
TOPIC 13: CASE NOTES AND BOOKMARKING DEFENDANTS

Subtopics:

1. Adding Case Notes and Toggling Case Note Sidebar
2. Pinning a Defendant to the Bookmark Bar

ADDING CASE NOTES & TOGGLING CASE NOTES

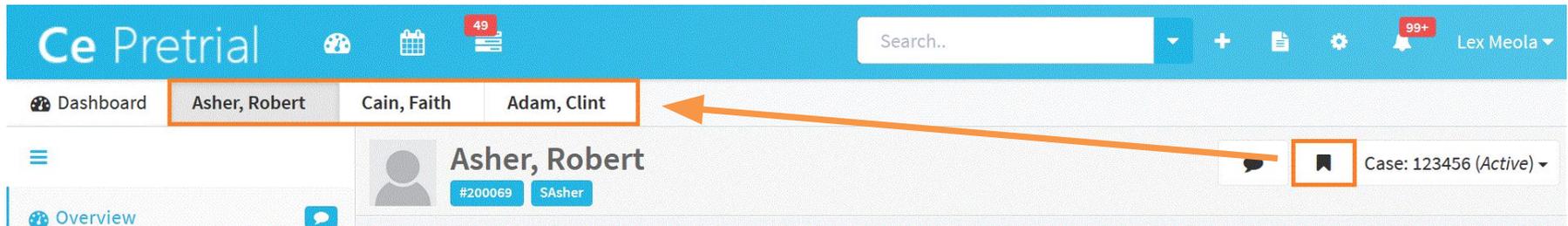
To add a comment to a Defendant's case, navigate to the Defendant overview by searching for a Defendant in the search bar. The user will then be able to view the Case Notes feature on the right hand side of the Defendant overview screen. Click on blank text box to write the desired note, and click Post. The case note will then be posted in the Case Notes sidebar. Case Notes can be toggled on and off from any screen on the Defendant overview by clicking the Case Note icon at the top left corner of Case Note sidebar.



Note: The purpose of this feature is NOT to note office/telephone contacts, or to report on scheduled contacts- metrics will not reflect on this feature.

PINNING A DEFENDANT TO THE BOOKMARK BAR

To pin a defendant to the bookmark bar, the user needs to select the “Toggle Bookmark” button. By doing this, the defendant’s name will remain static on the bookmark bar and provide the ability to access that particular defendant’s information on any screen in the application. The user has the ability to bookmark multiple defendants or remove a defendant from the bookmark bar. To remove a defendant from the bookmark bar, the user must select the “X” that appears to the right of the defendant’s name when the user places their cursor over the defendant’s bookmark.



Subtopics:

1. Navigating to the Search Bar
2. Performing an Advanced Search
3. View Search Results

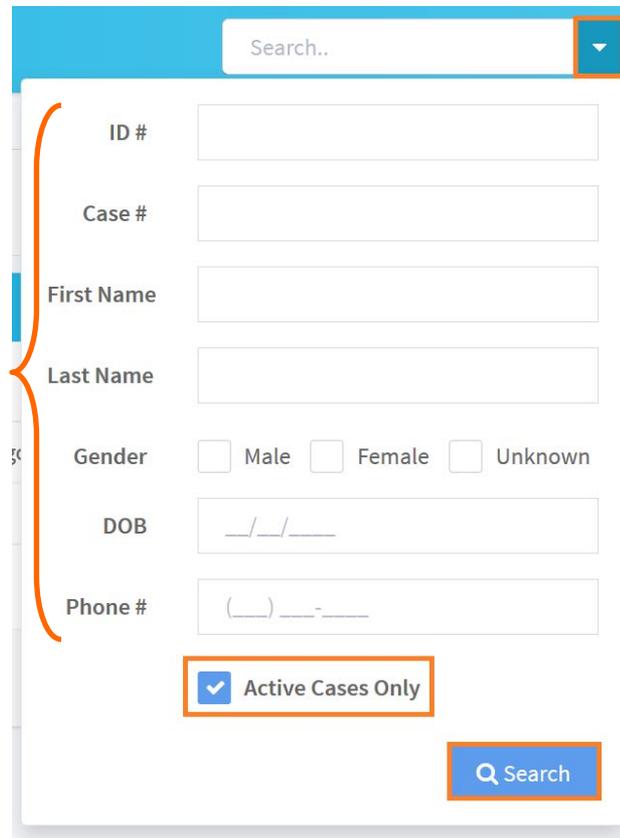
NAVIGATING TO THE SEARCH BAR

To search the application, the user should click on the search at the top right of the dashboard. Enter a defendant's name or pin # to perform a search. The search bar is a static component of the application – meaning it will always be available for the user to perform a search regardless of the tab or screen displayed.

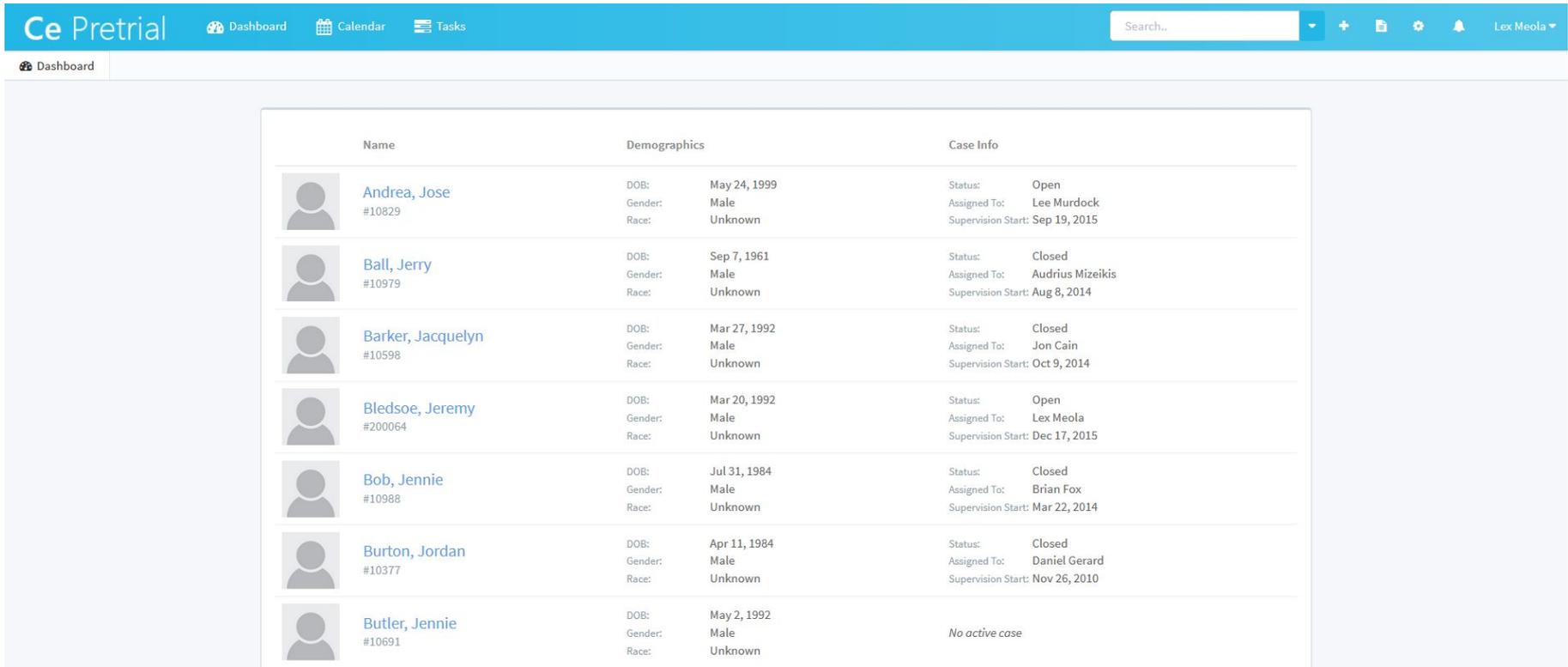


PERFORMING AN ADVANCED SEARCH

To perform an advanced search, the user should click on the down caret to see the available search options. Users are able to search by ID #, Case #, First Name, Last Name, Gender, Date of Birth, and Phone Number. The user also has the ability to filter the search based on Active or Inactive cases. To search for Active cases only, leave the “Active Cases Only” option selected. To search for Inactive cases, deselect the “Active Cases Only” button.

A screenshot of an advanced search form. At the top is a search bar with the placeholder text "Search.." and a blue down arrow icon. Below the search bar are several input fields: "ID #", "Case #", "First Name", "Last Name", "Gender" (with radio buttons for "Male", "Female", and "Unknown"), "DOB" (with a date format "___/___/___"), and "Phone #" (with a format "() ___-___"). At the bottom of the form is a checkbox labeled "Active Cases Only" which is checked, and a blue "Search" button with a magnifying glass icon. A large orange bracket on the left side of the form groups the input fields from "ID #" down to "Phone #".

The search results will be displayed in a list format with the defendant's Name, ID Number, picture, demographic information, and case information.



The screenshot shows the CePretrial dashboard interface. At the top, there is a navigation bar with the CePretrial logo, navigation icons for Dashboard, Calendar, and Tasks, a search bar, and user information for Lex Meola. Below the navigation bar, the main content area displays a list of search results for defendants. Each result is presented in a card format with three columns: Name, Demographics, and Case Info.

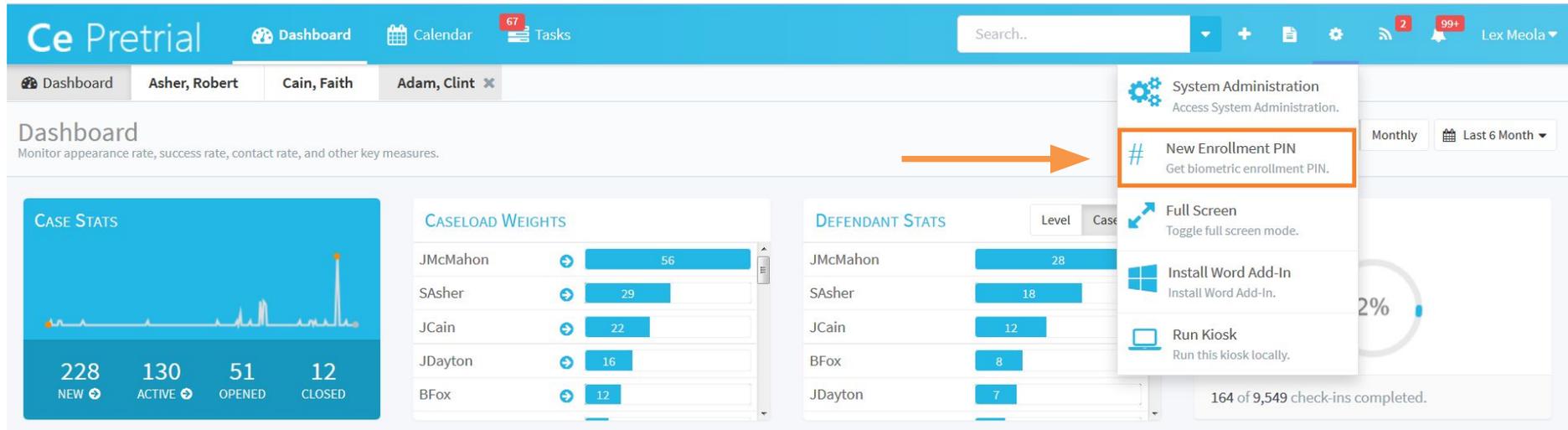
Name	Demographics	Case Info
 <p>Andrea, Jose #10829</p>	<p>DOB: May 24, 1999 Gender: Male Race: Unknown</p>	<p>Status: Open Assigned To: Lee Murdock Supervision Start: Sep 19, 2015</p>
 <p>Ball, Jerry #10979</p>	<p>DOB: Sep 7, 1961 Gender: Male Race: Unknown</p>	<p>Status: Closed Assigned To: Audrius Mizeikis Supervision Start: Aug 8, 2014</p>
 <p>Barker, Jacquelyn #10598</p>	<p>DOB: Mar 27, 1992 Gender: Male Race: Unknown</p>	<p>Status: Closed Assigned To: Jon Cain Supervision Start: Oct 9, 2014</p>
 <p>Bledsoe, Jeremy #200064</p>	<p>DOB: Mar 20, 1992 Gender: Male Race: Unknown</p>	<p>Status: Open Assigned To: Lex Meola Supervision Start: Dec 17, 2015</p>
 <p>Bob, Jennie #10988</p>	<p>DOB: Jul 31, 1984 Gender: Male Race: Unknown</p>	<p>Status: Closed Assigned To: Brian Fox Supervision Start: Mar 22, 2014</p>
 <p>Burton, Jordan #10377</p>	<p>DOB: Apr 11, 1984 Gender: Male Race: Unknown</p>	<p>Status: Closed Assigned To: Daniel Gerard Supervision Start: Nov 26, 2010</p>
 <p>Butler, Jennie #10691</p>	<p>DOB: May 2, 1992 Gender: Male Race: Unknown</p>	<p>No active case</p>

Subtopics:

1. Navigate to New Enrollment PIN
2. Viewing New Enrollment PIN and closing the window.

NAVIGATE TO NEW ENROLLMENT PIN

To generate a New Enrollment PIN for kiosk check-ins, the user will need to navigate to New Enrollment Pin. To do this, click on the Gear Menu Icon and select New Enrollment PIN.



The screenshot shows the CePretrial dashboard interface. At the top, there is a navigation bar with 'Ce Pretrial' logo, 'Dashboard', 'Calendar', and 'Tasks' (with a red notification badge for 67 tasks). A search bar and user profile 'Lex Meola' are also present. Below the navigation bar, there are tabs for 'Dashboard', 'Asher, Robert', 'Cain, Faith', and 'Adam, Clint'. The main content area is titled 'Dashboard' and includes a sub-header 'Monitor appearance rate, success rate, contact rate, and other key measures.' The dashboard features several data visualization components: 'CASE STATS' with a line graph and four metrics (228 NEW, 130 ACTIVE, 51 OPENED, 12 CLOSED); 'CASELOAD WEIGHTS' table; 'DEFENDANT STATS' table; and a 'Run Kiosk' button. A gear menu is open on the right side, with an orange arrow pointing to the 'New Enrollment PIN' option, which is highlighted with a red border. The menu also includes 'System Administration', 'Full Screen', 'Install Word Add-In', and 'Run Kiosk'. A status bar at the bottom right indicates '164 of 9,549 check-ins completed.'

Name	Weight
JMcMahon	56
SAsher	29
JCain	22
JDayton	16
BFox	12

Name	Level	Case
JMcMahon	28	
SAsher	18	
JCain	12	
BFox	8	
JDayton	7	

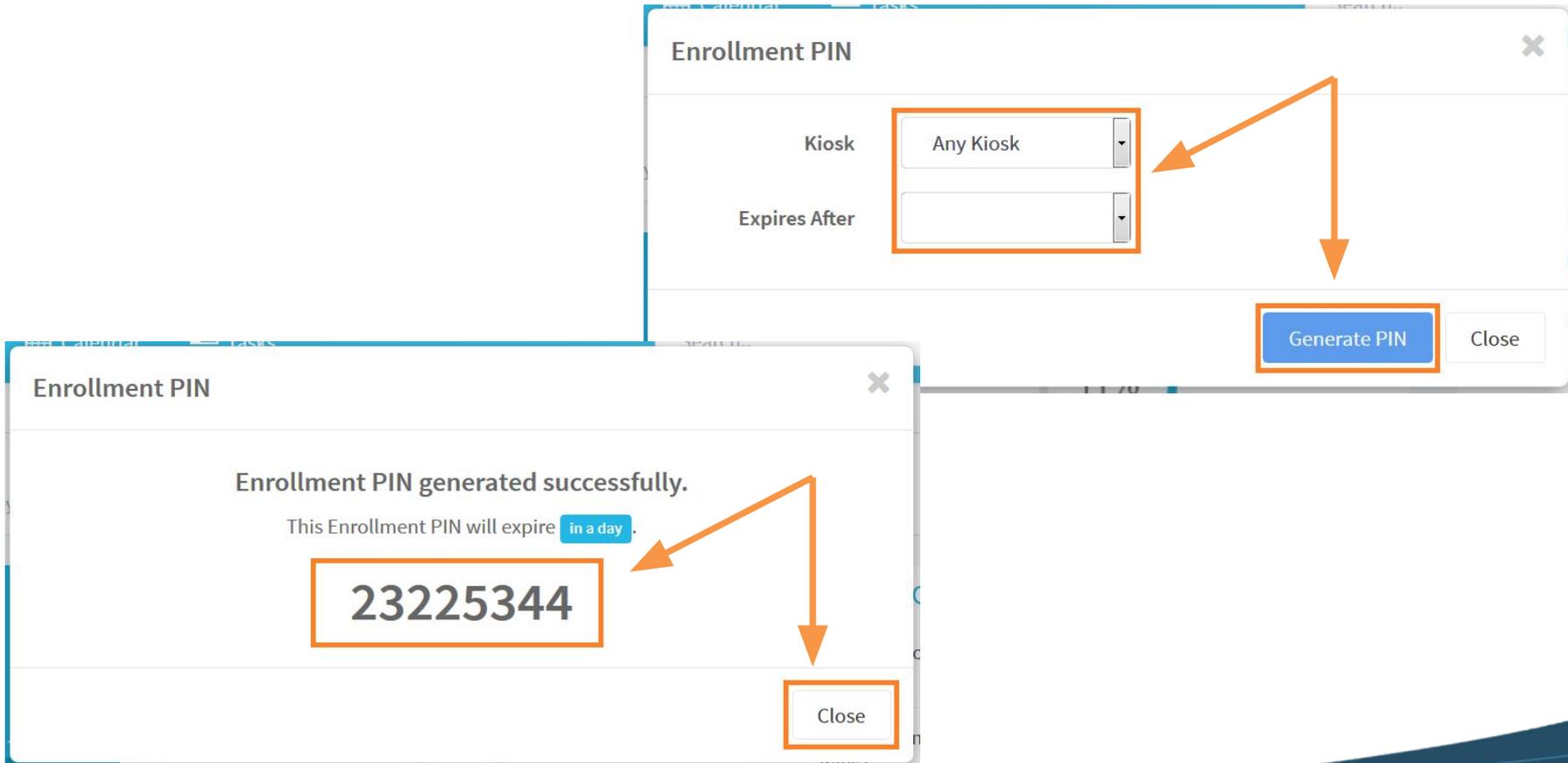


TIP

An enrollment PIN is the number that the defendant will enter into the kiosk at the time of their check-in. This number puts the kiosk in the mode to check when the enrollment PIN expires.

VIEWING AND CLOSING NEW ENROLLMENT PIN

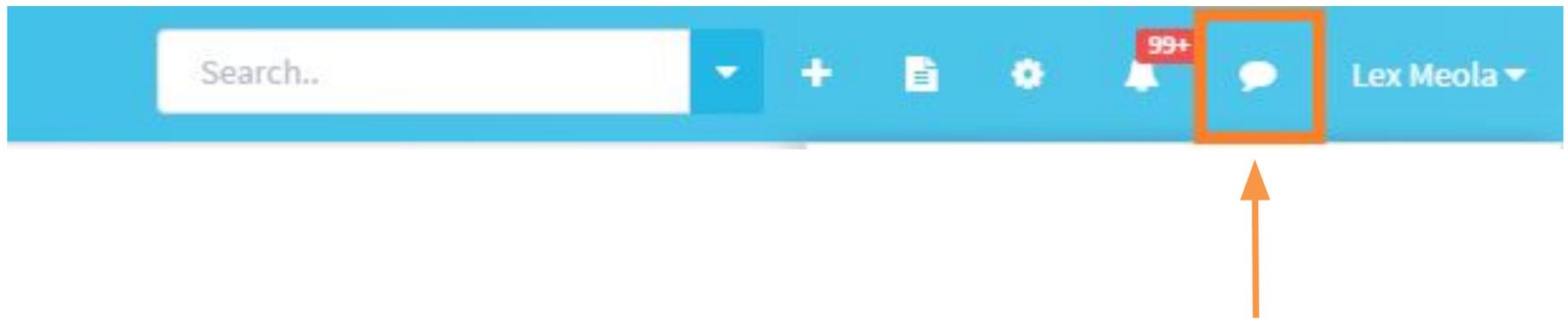
Once the user selects New Enrollment PIN, they will need to designate which kiosk they are generating a PIN for and whether that PIN will expire in 1 hour, 1 day or 7 days from the pick lists. After selecting “Generate PIN,” a new Enrollment PIN will pop up at the center of the screen. Once viewed, the user will close the box by pressing the “Close” button. Once the PIN is expired, the user will need to generate a new PIN.

The image displays two screenshots of the 'Enrollment PIN' interface. The top screenshot shows the configuration screen with a title bar 'Enrollment PIN' and a close button. It contains two dropdown menus: 'Kiosk' with 'Any Kiosk' selected, and 'Expires After'. Below these is a blue 'Generate PIN' button and a white 'Close' button. Orange arrows point from the dropdown menus to the 'Generate PIN' button. The bottom screenshot shows the success message 'Enrollment PIN generated successfully.' followed by 'This Enrollment PIN will expire in a day.' Below this is a large box containing the PIN '23225344' and a 'Close' button. Orange arrows point from the success message to the PIN box and from the PIN box to the 'Close' button.

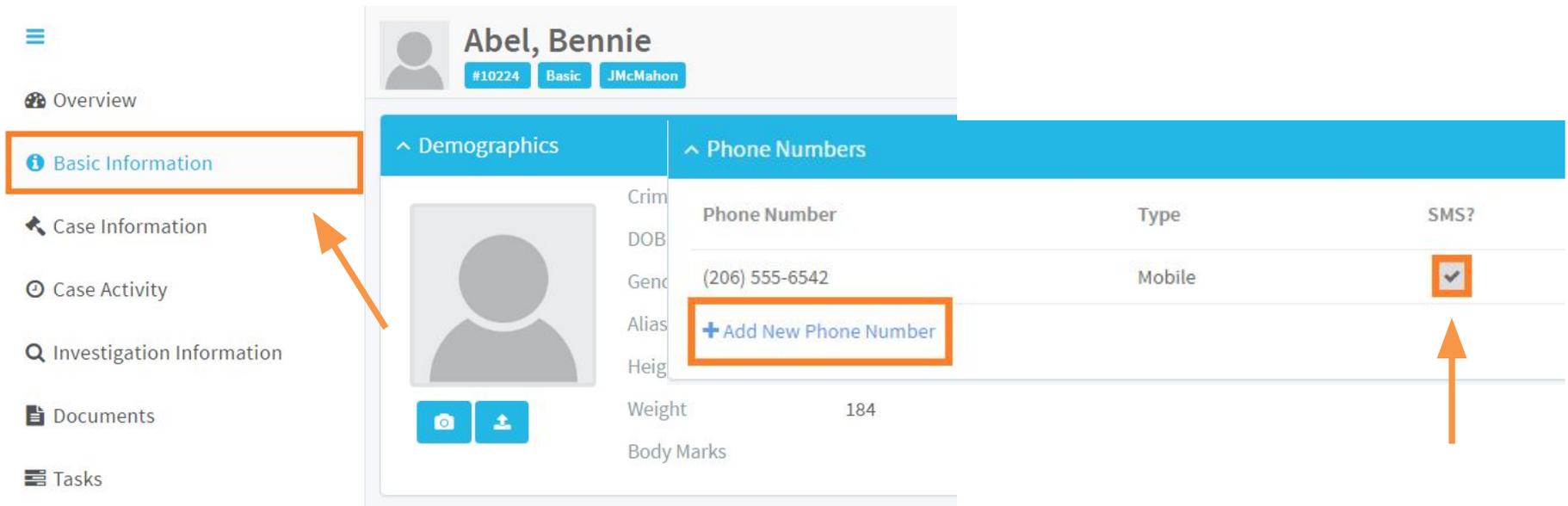
Subtopics:

1. Navigation to SMS Chat Feature
2. Setting Up SMS Reminders
3. Sending a Message and Exposing Responses
4. SMS Messaging Preferences

To access the SMS Chat feature, click on the SMS Chat icon located in the top right corner of the User taskbar.



To set a Defendant up to receive SMS chat reminders, pull up a Defendant's Basic Information, located in the hamburger menu to the left of the Defendant Overview. Under Phone Numbers, add the Defendant's mobile telephone number and check the "SMS" box to deem the telephone number as SMS-compatible.



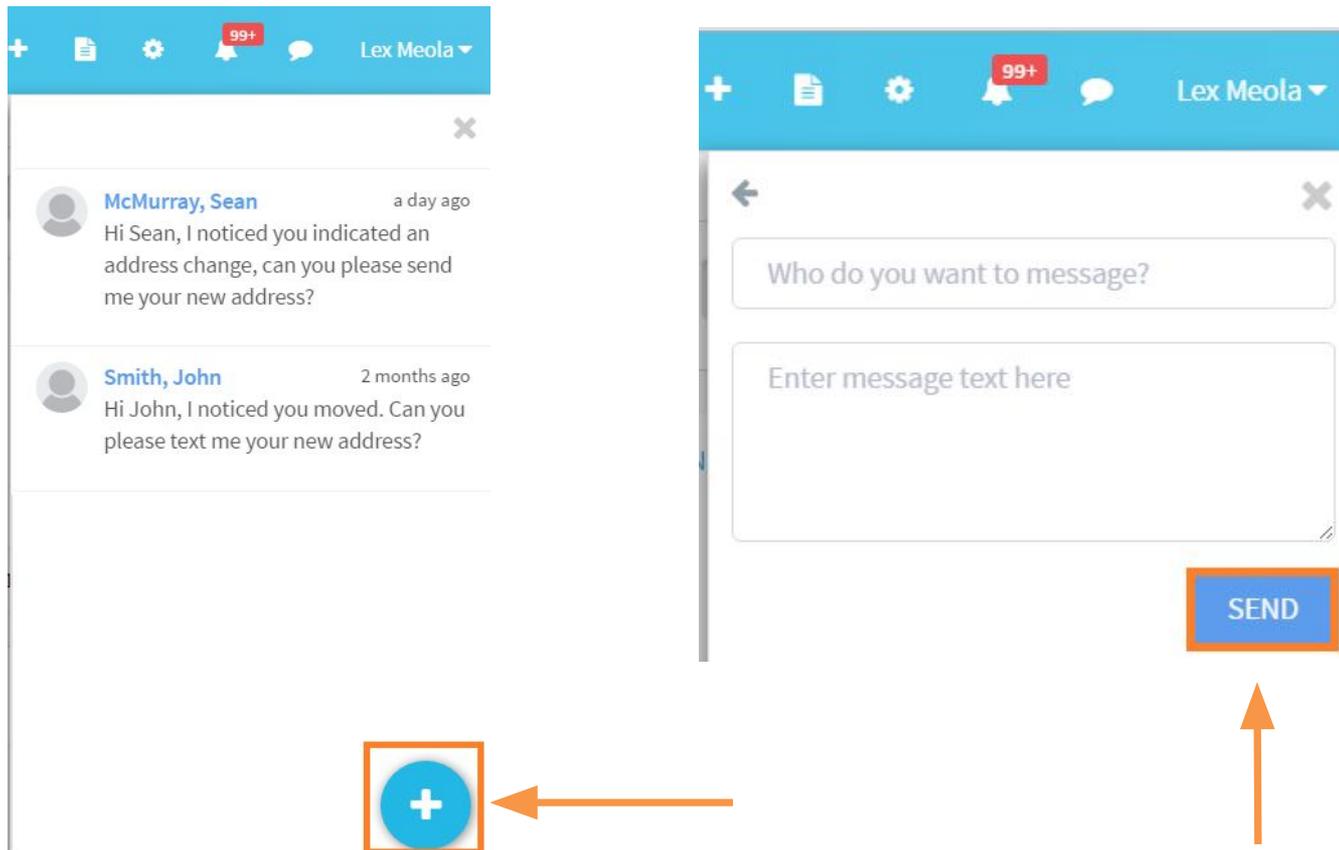
The screenshot displays the user interface for a defendant's profile. On the left, a sidebar contains a hamburger menu icon and several navigation options: Overview, Basic Information (highlighted with an orange box), Case Information, Case Activity, Investigation Information, Documents, and Tasks. An orange arrow points from the 'Basic Information' tab to the main content area. The main content area shows the defendant's name 'Abel, Bennie' and tabs for 'Demographics' and 'Phone Numbers'. The 'Phone Numbers' tab is active, displaying a table with the following data:

Phone Number	Type	SMS?
(206) 555-6542	Mobile	<input checked="" type="checkbox"/>

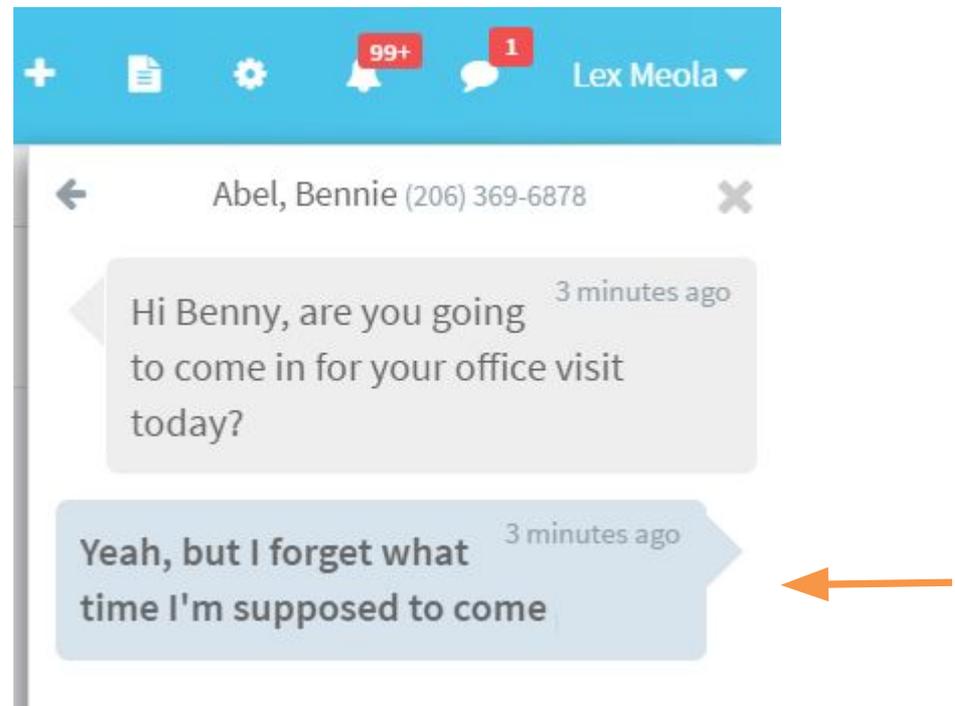
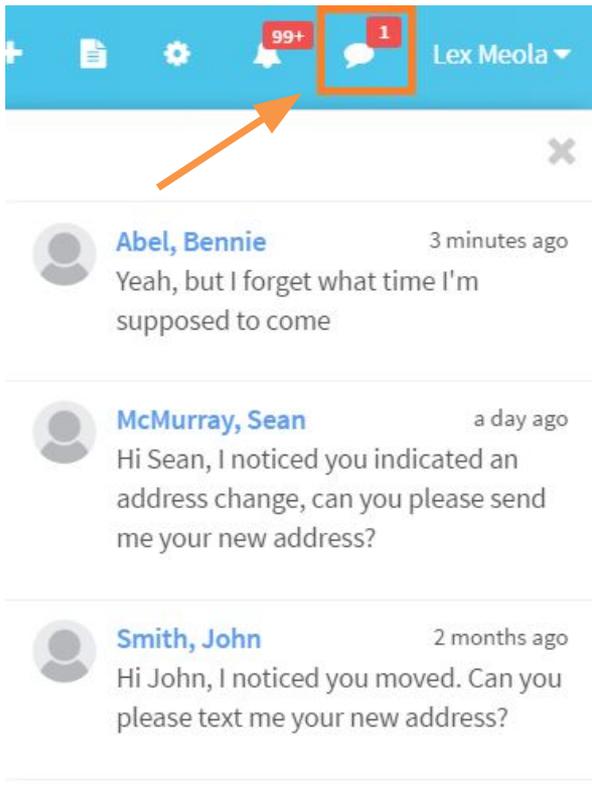
Below the table, there is a button labeled '+ Add New Phone Number' (highlighted with an orange box) and an orange arrow pointing to the checked 'SMS?' checkbox.

SENDING A MESSAGE AND EXPOSING RESPONSES

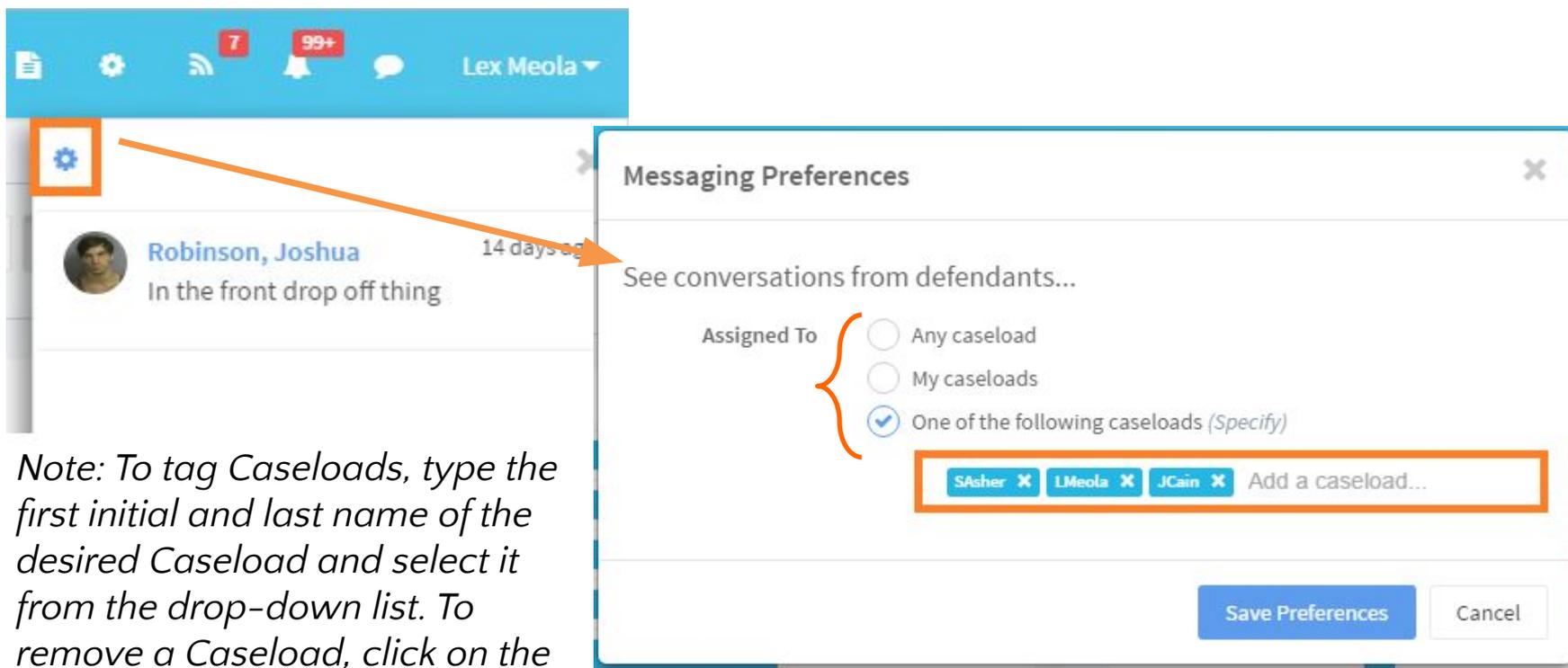
To access the SMS Chat Feature, click on the SMS Chat icon located on the top right of navigation taskbar. To send a SMS Message, click on the plus icon on the bottom of the chat screen. Search for a Defendant by name, and type the desired message. Once finished, click Send.



When a Defendant responds to an SMS message, the system will generate an alert on the SMS Chat icon. To expose the response, click on chat icon located in top right taskbar of screen. Click the name of the particular Defendant to expose their response to the SMS message.



To filter the SMS Messages that you receive notifications for and are able to see, the User should select the gear icon within the SMS Chat feature. Next, you are able to select whether you want to view SMS messages from “Any Caseload,” “My Caseload,” or specify multiple Caseloads with a tagging system as shown below.



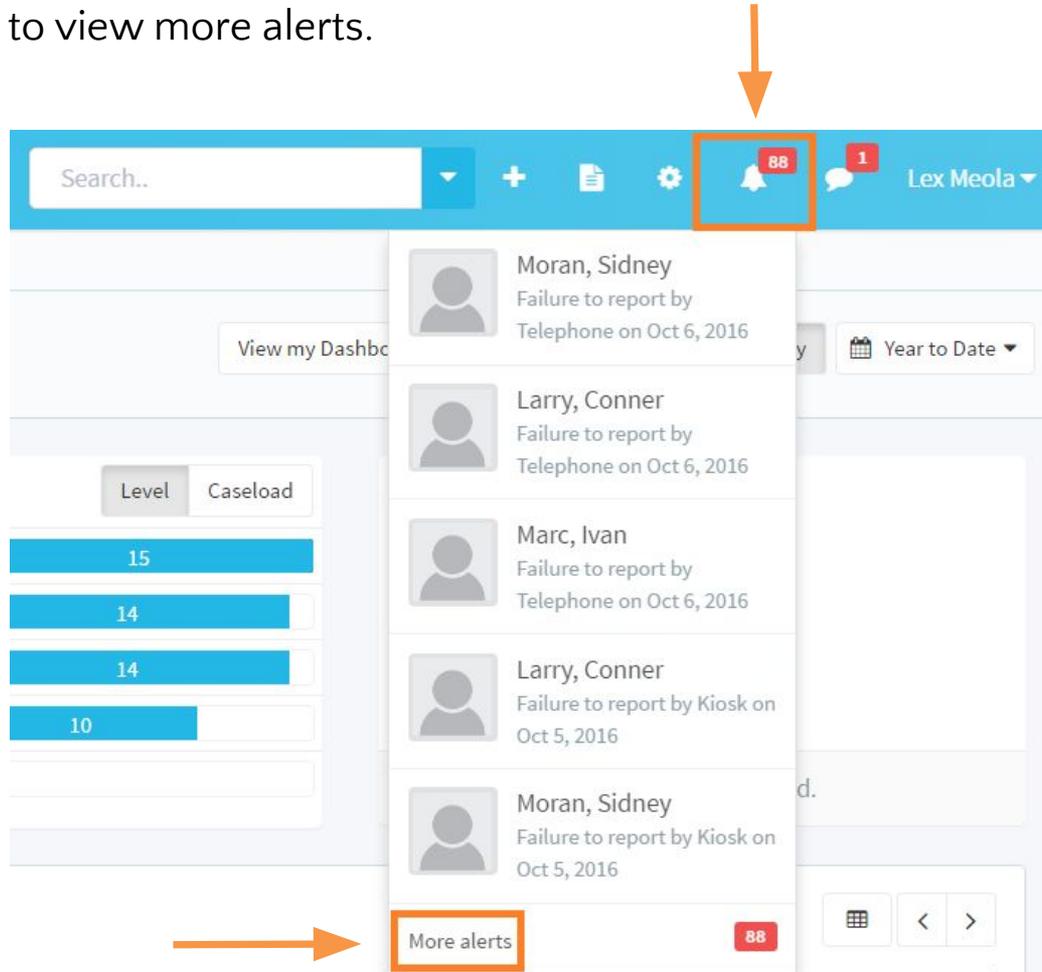
Note: To tag Caseloads, type the first initial and last name of the desired Caseload and select it from the drop-down list. To remove a Caseload, click on the “X” to the right of the name.

Subtopics:

1. Accessing Filtering Alerts
2. Filtering Alerts
3. Notification Preferences

ACCESSING FILTERING ALERTS

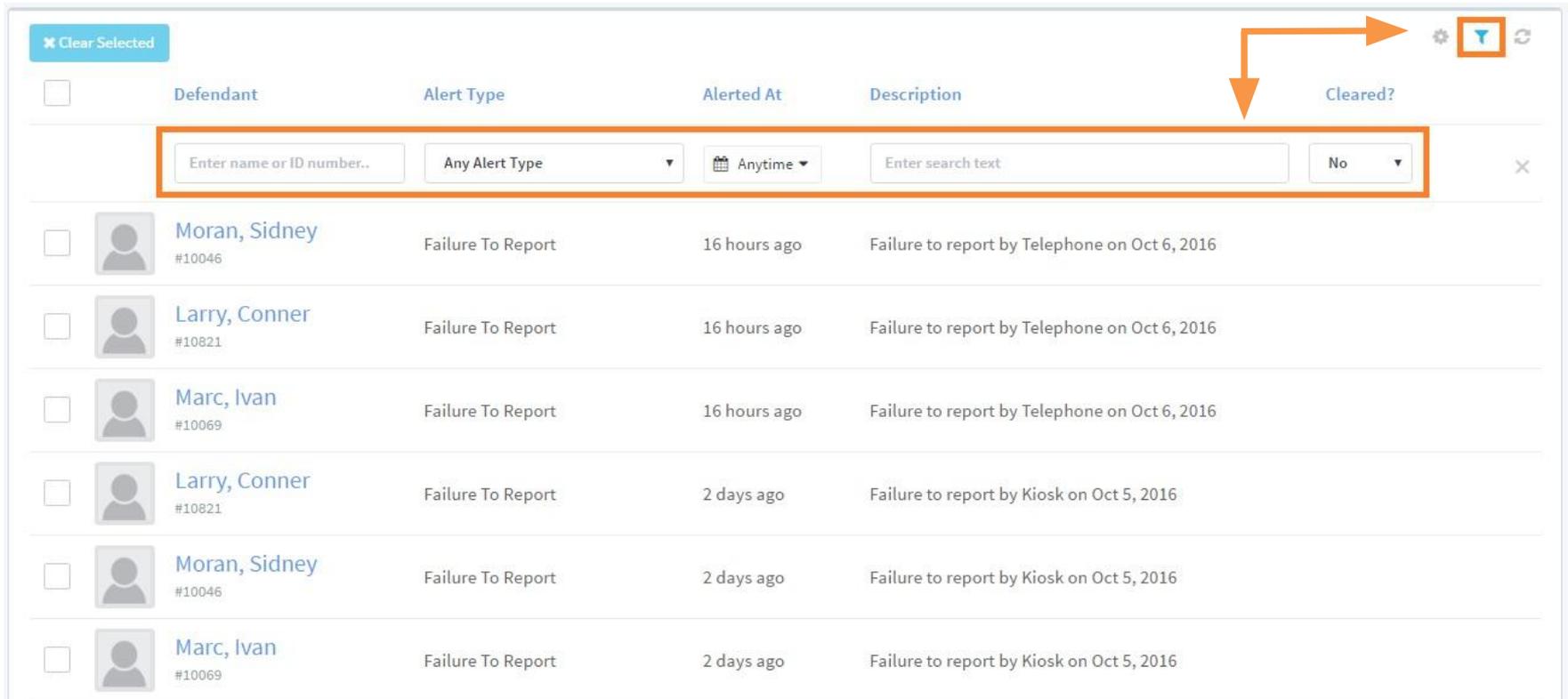
To filter Alerts, the User will click on the “Alerts” icon on the User menu to be navigated to view more alerts.



The screenshot displays the CePretrial dashboard interface. At the top, a blue navigation bar contains a search field, a plus icon, a document icon, a gear icon, a bell icon with a red notification badge showing '88', and a chat icon with a red notification badge showing '1'. The user's name 'Lex Meola' is visible on the right. Below the navigation bar, the main dashboard area shows a 'View my Dashboard' button, a 'Year to Date' filter, and a 'Caseload' bar chart with four bars of varying heights (15, 14, 14, 10). A dropdown menu is open, listing several alerts with user names and failure dates. At the bottom of the dropdown menu, a 'More alerts' button is highlighted with an orange box, and an orange arrow points to it from the left. Another orange arrow points to the bell icon in the navigation bar from above.

FILTERING ALERTS

To filter alerts, the User should click on the filtering icon at the top right of the Alerts screen. Alerts can be filtered by Defendant, Alert Type, when the Officer was alerted, the Alert Description, and whether the Alert has been cleared or not.

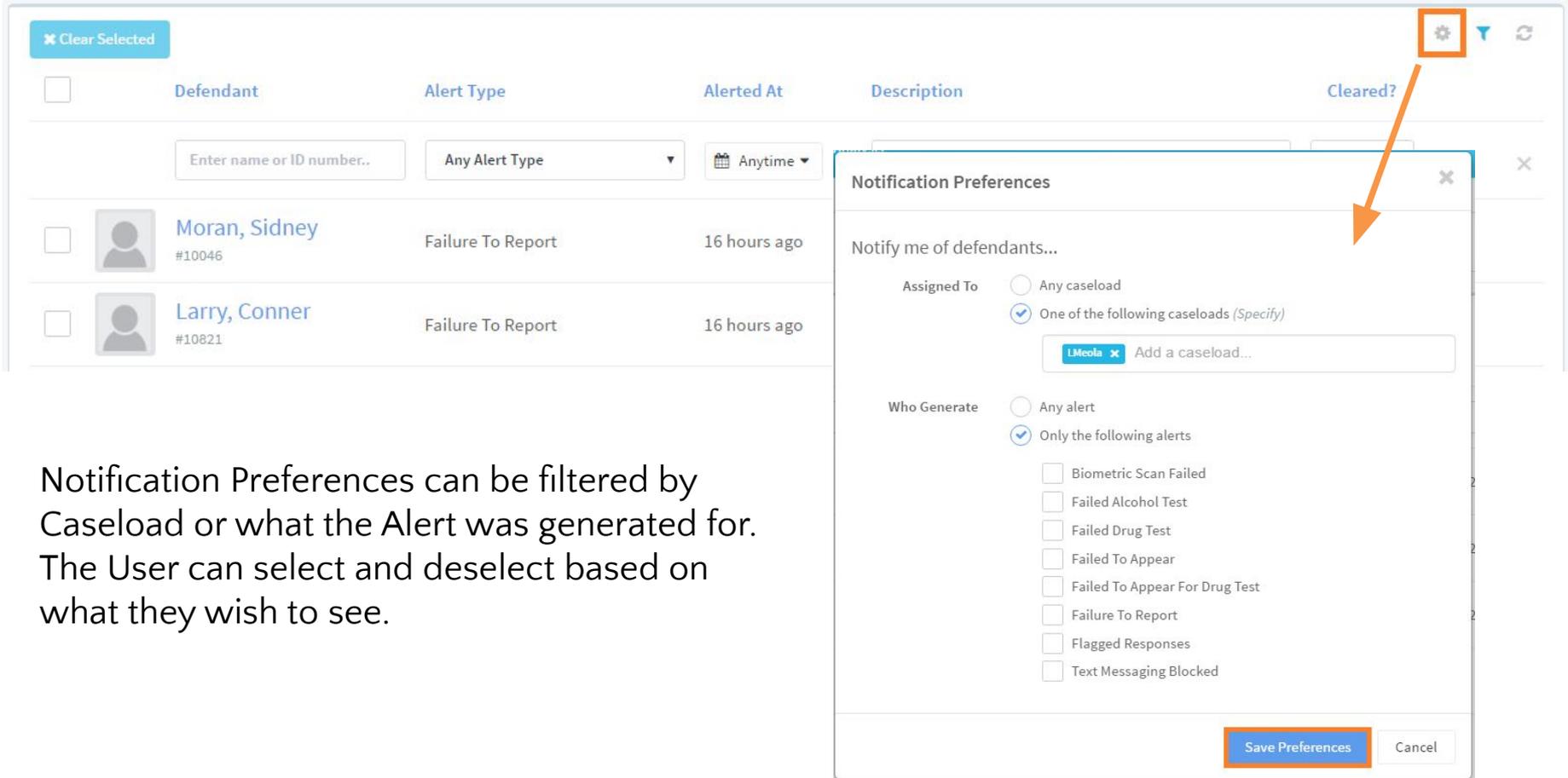


The screenshot shows a table of alerts with a filter bar at the top. The filter bar is highlighted with an orange border and contains the following fields: "Enter name or ID number..", "Any Alert Type" (dropdown), "Anytime" (calendar icon dropdown), "Enter search text" (text input), and "No" (dropdown). A filter icon (funnel) is highlighted with an orange box and an orange arrow points to it from the top right. The table below has columns: Defendant, Alert Type, Alerted At, Description, and Cleared?.

	Defendant	Alert Type	Alerted At	Description	Cleared?
<input type="checkbox"/>	Moran, Sidney #10046	Failure To Report	16 hours ago	Failure to report by Telephone on Oct 6, 2016	No
<input type="checkbox"/>	Larry, Conner #10821	Failure To Report	16 hours ago	Failure to report by Telephone on Oct 6, 2016	No
<input type="checkbox"/>	Marc, Ivan #10069	Failure To Report	16 hours ago	Failure to report by Telephone on Oct 6, 2016	No
<input type="checkbox"/>	Larry, Conner #10821	Failure To Report	2 days ago	Failure to report by Kiosk on Oct 5, 2016	No
<input type="checkbox"/>	Moran, Sidney #10046	Failure To Report	2 days ago	Failure to report by Kiosk on Oct 5, 2016	No
<input type="checkbox"/>	Marc, Ivan #10069	Failure To Report	2 days ago	Failure to report by Kiosk on Oct 5, 2016	No

NOTIFICATION PREFERENCES

To access Notification Preferences, the User should click on the gear icon at the top right of the dialog box.



The screenshot displays a table of defendant alerts and a 'Notification Preferences' dialog box. The table has columns for 'Defendant', 'Alert Type', 'Alerted At', 'Description', and 'Cleared?'. Two rows are visible: one for 'Moran, Sidney' and one for 'Larry, Conner', both with 'Failure To Report' alerts. The 'Notification Preferences' dialog box is open, showing options for 'Assigned To' (Any caseload or One of the following caseloads) and 'Who Generate' (Any alert or Only the following alerts). A list of alert types is shown with checkboxes, including 'Biometric Scan Failed', 'Failed Alcohol Test', 'Failed Drug Test', 'Failed To Appear', 'Failed To Appear For Drug Test', 'Failure To Report', 'Flagged Responses', and 'Text Messaging Blocked'. The 'Save Preferences' button is highlighted with an orange box.

Defendant	Alert Type	Alerted At	Description	Cleared?
<input type="checkbox"/> Moran, Sidney #10046	Failure To Report	16 hours ago		
<input type="checkbox"/> Larry, Conner #10821	Failure To Report	16 hours ago		

Notification Preferences

Notify me of defendants...

Assigned To

- Any caseload
- One of the following caseloads (Specify)

Add a caseload...

Who Generate

- Any alert
- Only the following alerts

- Biometric Scan Failed
- Failed Alcohol Test
- Failed Drug Test
- Failed To Appear
- Failed To Appear For Drug Test
- Failure To Report
- Flagged Responses
- Text Messaging Blocked

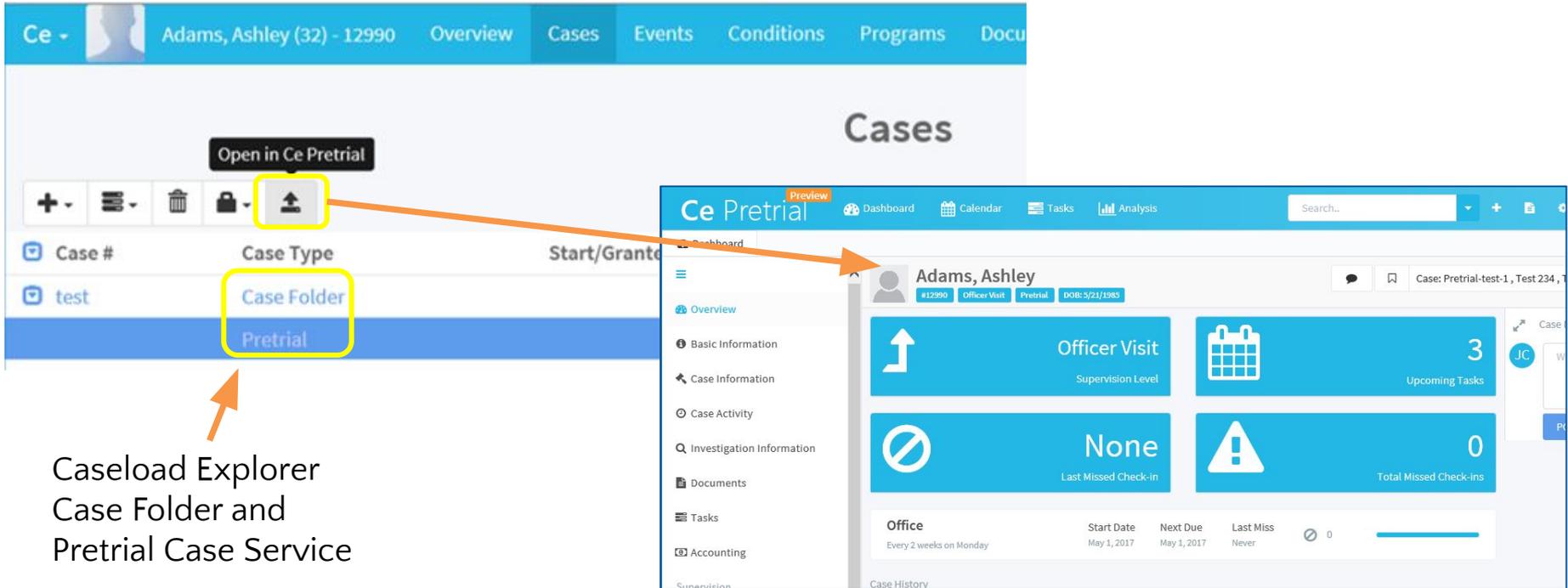
Save Preferences Cancel

Notification Preferences can be filtered by Caseload or what the Alert was generated for. The User can select and deselect based on what they wish to see.

Subtopics:

1. Overview
2. Data Synchronization
3. Caseload Explorer Pretrial Information Panel

When Ce Pretrial is integrated with Caseload Explorer, a new defendant or case will be first entered into the system through Caseload Explorer by creating a Pretrial case service. Once the initial entry of the defendant or case folder and Pretrial case service is complete, the defendant and/or case will be available in Ce Pretrial for further management. All management of a Pretrial case (investigation, supervision, drug testing, accounting, etc.) will be done from within Ce Pretrial. Users can easily navigate from a defendant's overview page in Caseload Explorer to Ce Pretrial through the Task Switcher or the "Open in Ce Pretrial" link available from the pretrial case service.

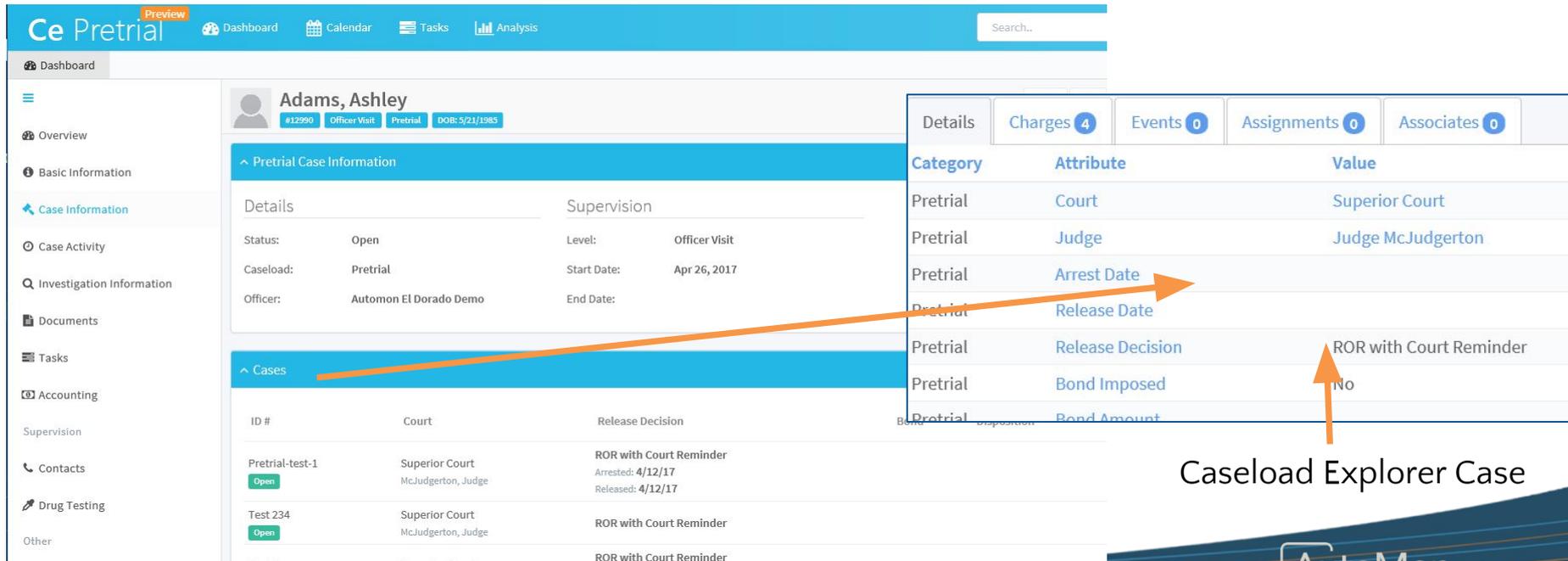


The image shows two overlapping screenshots. The top-left screenshot is from Caseload Explorer, displaying a case for 'Adams, Ashley (32) - 12990'. A table lists case types, with 'Pretrial' highlighted. A yellow box highlights the 'Pretrial' entry, and an orange arrow points to a text label below. Another yellow box highlights an 'Open in Ce Pretrial' button above the table. The bottom-right screenshot is from the Ce Pretrial system, showing a detailed dashboard for 'Adams, Ashley' with various metrics like 'Officer Visit', 'Upcoming Tasks', and 'Total Missed Check-ins'. An orange arrow points from the 'Open in Ce Pretrial' button in the Caseload Explorer screenshot to the top of the Ce Pretrial dashboard.

Caseload Explorer Case Folder and Pretrial Case Service

Defendant and case information will synchronize in real time when changes are made in Caseload Explorer or Ce Pretrial. This will allow for case information to be displayed on the Caseload Explorer Cases tab and an overview panel. Defendant basic information and demographics will be updated in each system accordingly in real time when an update is made. For example, if an address is updated in Ce Pretrial, the address in Caseload Explorer will also be updated (same for DOB, gender, hair color, phone number, etc.).

Case information will synchronize from Ce Pretrial to be displayed in Caseload Explorer. This includes: Case Number, Arrest Date, Court and Judge, Release Date, Release Decision, Bond amounts, Disposition Date, Outcome, Sentence, Diversion Type and all active Charges. The case information shown in Caseload Explorer is read-only and will be updated as changes are made in Ce Pretrial.



Ce Pretrial | Dashboard | Calendar | Tasks | Analysis | Search..

Adams, Ashley | #12990 | Officer Visit | Pretrial | DOB: 5/21/1983

Pretrial Case Information

Details		Supervision	
Status:	Open	Level:	Officer Visit
Caseload:	Pretrial	Start Date:	Apr 26, 2017
Officer:	Automon El Dorado Demo	End Date:	

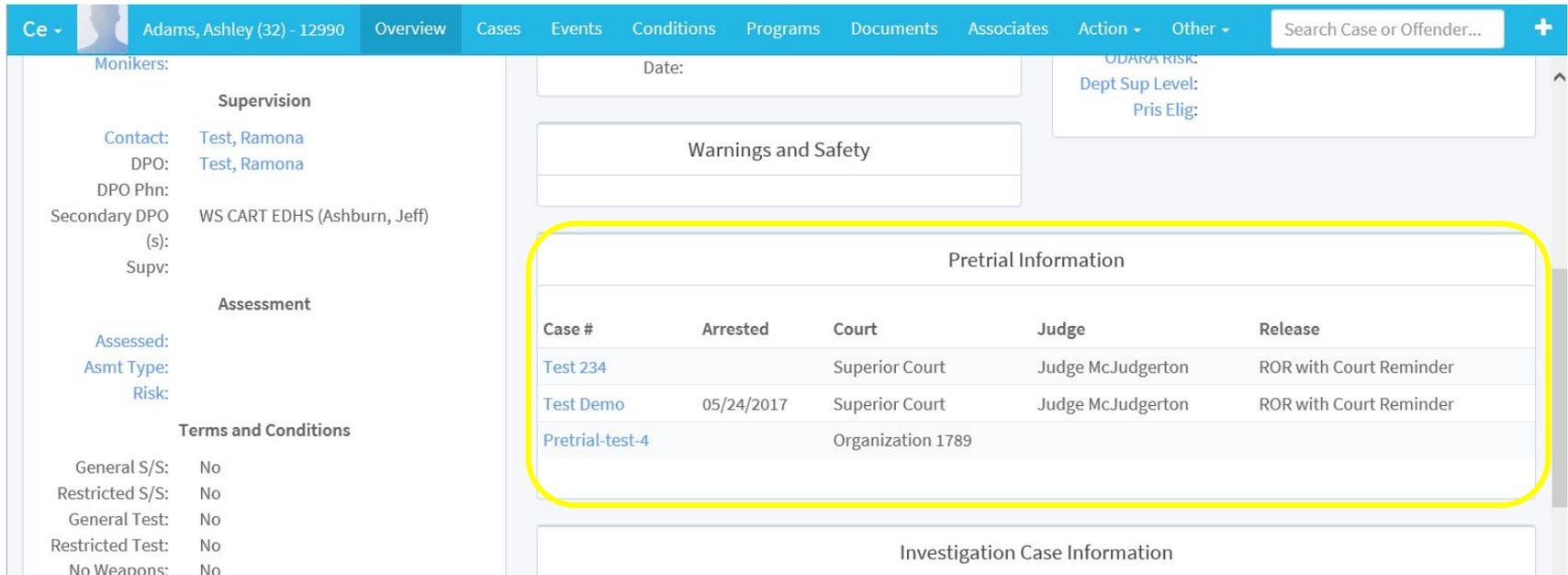
Cases

ID #	Court	Release Decision
Pretrial-test-1 Open	Superior Court McJudgerton, Judge	ROR with Court Reminder Arrested: 4/12/17 Released: 4/12/17
Test 234 Open	Superior Court McJudgerton, Judge	ROR with Court Reminder
		ROR with Court Reminder

Category	Attribute	Value
Pretrial	Court	Superior Court
Pretrial	Judge	Judge McJudgerton
Pretrial	Arrest Date	
Pretrial	Release Date	
Pretrial	Release Decision	ROR with Court Reminder
Pretrial	Bond Imposed	No
Pretrial	Bond Amount	

Caseload Explorer Case

A Pretrial Information panel will display on the person overview screen in Caseload Explorer if the person has an active Pretrial case. This panel will populate with important information as the case is managed in Ce Pretrial. This includes the Case Number, Arrest Date, Court, Judge and Release Decision. Once a case is closed, it no longer displays on the panel, however it will remain on the Cases tab as an inactive case.



The screenshot shows the CePretrial software interface for a user named Adams, Ashley (32) - 12990. The interface includes a navigation bar with tabs for Overview, Cases, Events, Conditions, Programs, Documents, Associates, Action, and Other. A search bar is located on the right side of the navigation bar.

The main content area is divided into several sections:

- Monikers:** A section for identifying the individual.
- Supervision:** A section for supervision details, including Contact (Test, Ramona), DPO (Test, Ramona), DPO Phn, Secondary DPO (WS CART EDHS (Ashburn, Jeff) (s)), and Supv.
- Assessment:** A section for assessment details, including Assessed, Asmt Type, and Risk.
- Terms and Conditions:** A section for terms and conditions, including General S/S, Restricted S/S, General Test, Restricted Test, and No Weapons.
- Pretrial Information:** A table listing pretrial cases, highlighted with a yellow border. The table has columns for Case #, Arrested, Court, Judge, and Release.
- Warnings and Safety:** A section for warnings and safety information.
- Investigation Case Information:** A section for investigation case information.

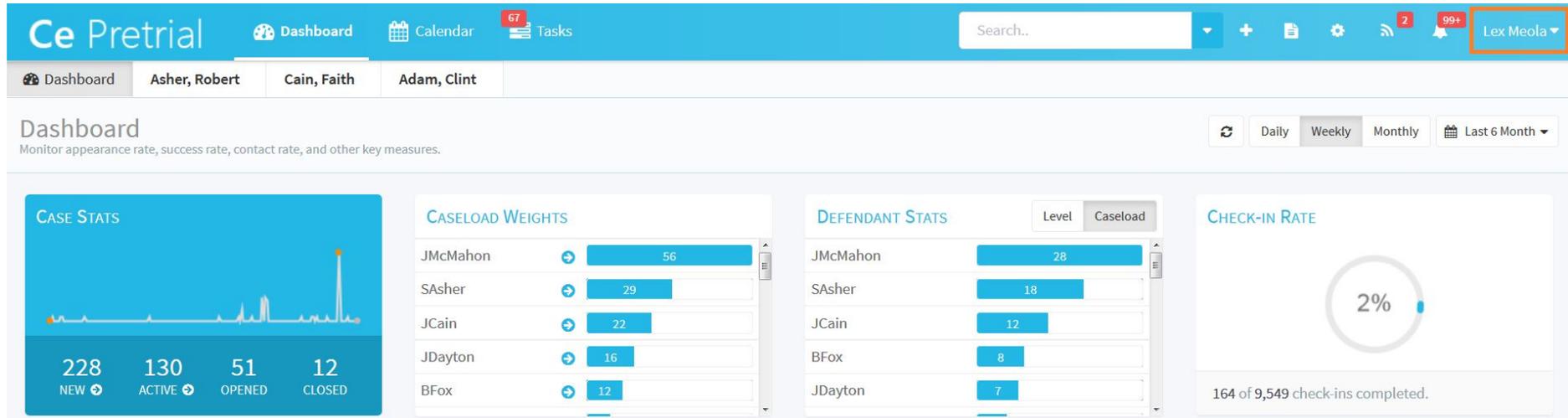
Case #	Arrested	Court	Judge	Release
Test 234		Superior Court	Judge McJudgerton	ROR with Court Reminder
Test Demo	05/24/2017	Superior Court	Judge McJudgerton	ROR with Court Reminder
Pretrial-test-4		Organization 1789		

Subtopics:

1. Navigate to the user drop-down Menu
2. Sign Out of Ce Pretrial

NAVIGATE TO THE USER DROP-DOWN MENU

To navigate to the user Drop-Down Menu, the user will need to click on their name in the top right corner of the screen.

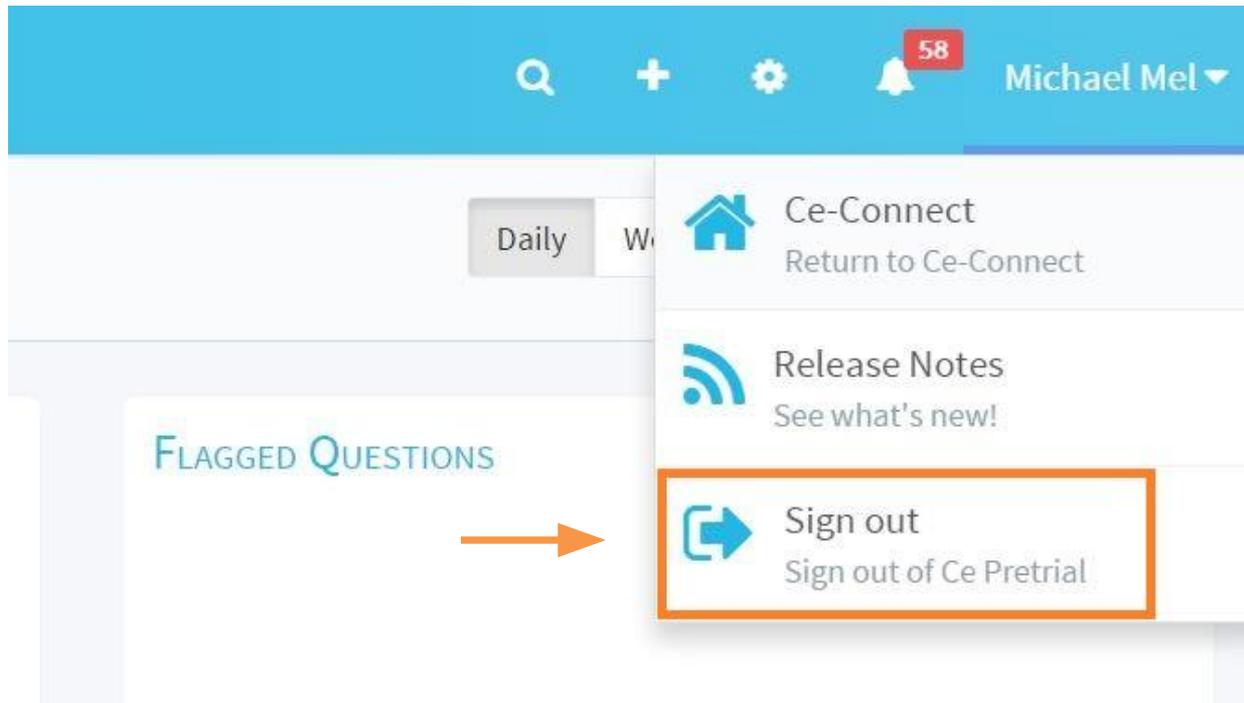


The screenshot shows the CePretrial dashboard interface. At the top, there is a navigation bar with the CePretrial logo, navigation tabs for Dashboard, Calendar, and Tasks (with a 67 notification badge), a search bar, and utility icons for home, add, settings, and notifications (with 2 and 99+ notification badges). The user's name, Lex Meola, is displayed in a dropdown menu in the top right corner, highlighted with an orange box and an orange arrow pointing to it from above.

Below the navigation bar, there is a secondary navigation bar with tabs for Dashboard, Asher, Robert, Cain, Faith, and Adam, Clint. The main content area is titled "Dashboard" and includes a subtitle "Monitor appearance rate, success rate, contact rate, and other key measures." and a refresh button. The dashboard is divided into four main sections:

- CASE STATS:** A line chart showing case trends over time. Below the chart are four key metrics: 228 NEW, 130 ACTIVE, 51 OPENED, and 12 CLOSED.
- CASELOAD WEIGHTS:** A table showing caseload weights for five users: JMcMahon (56), SAsher (29), JCain (22), JDayton (16), and BFox (12).
- DEFENDANT STATS:** A table showing defendant stats for five users: JMcMahon (28), SAsher (18), JCain (12), BFox (8), and JDayton (7).
- CHECK-IN RATE:** A circular gauge showing a 2% check-in rate. Below the gauge, it states "164 of 9,549 check-ins completed."

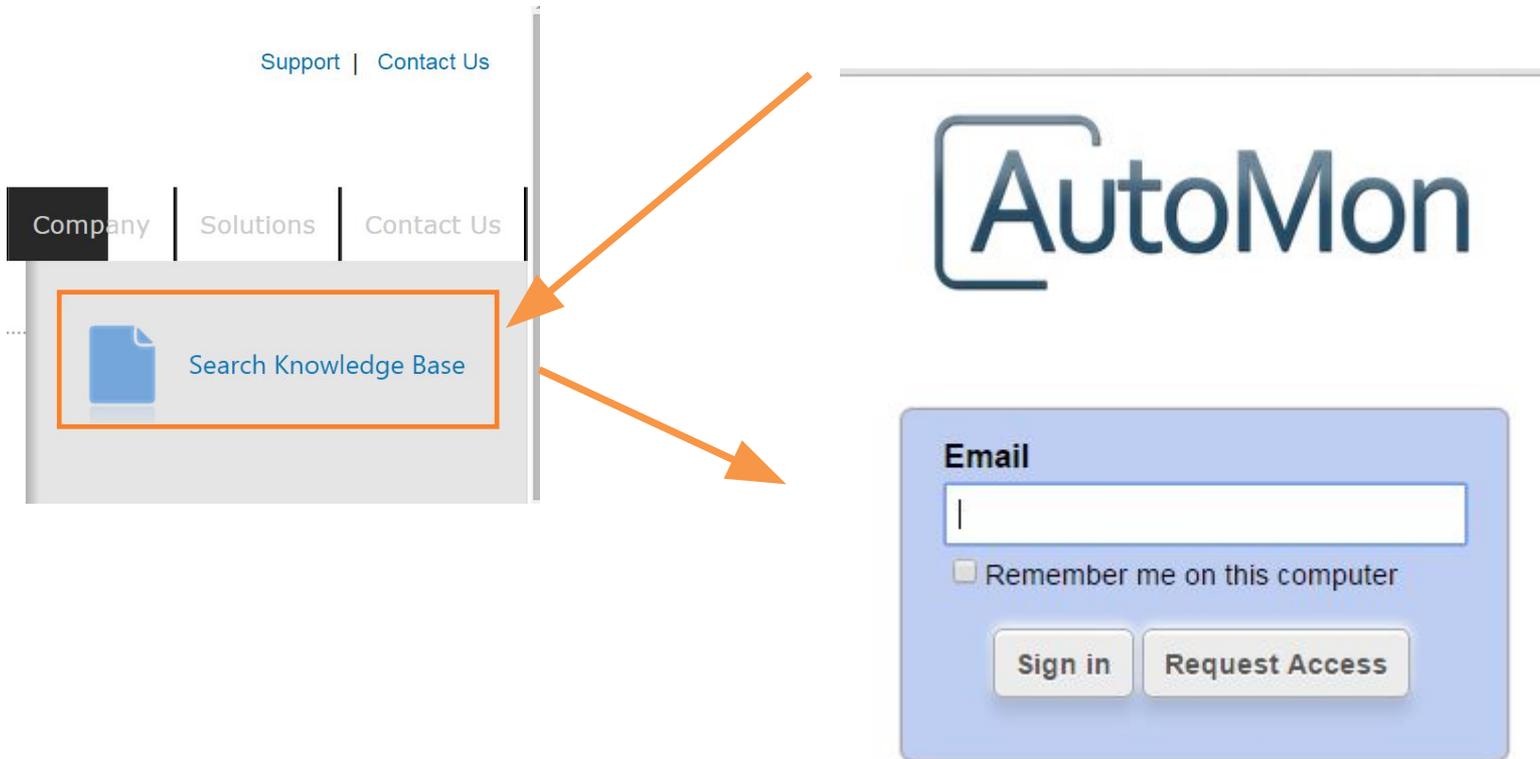
To sign out of Ce Pretrial, the user must select “Sign Out” from the user drop-down menu. When a user signs out they will be redirected to the Ce-Connect login page.



Subtopics:

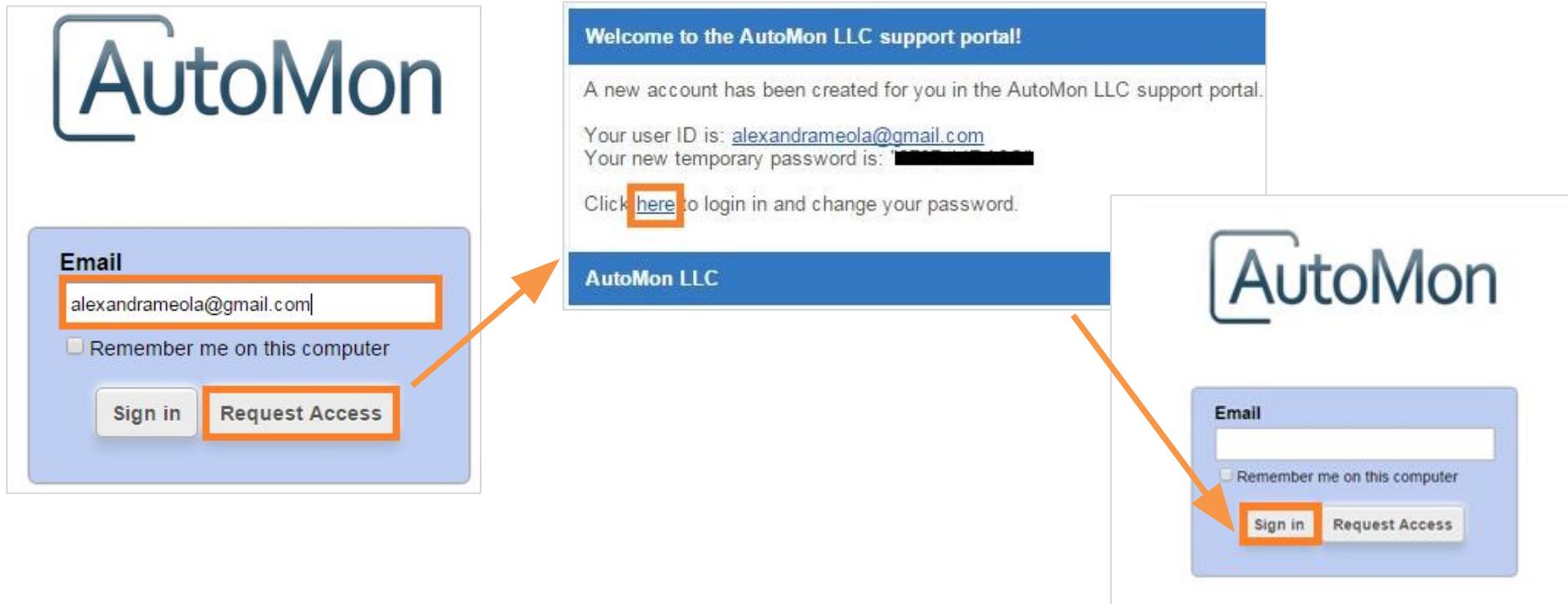
1. Knowledge Base
2. Requesting Access to Knowledge Base
3. Changing Temporary Password
4. Search Knowledge Base by Keyword
5. Reporting Issues
6. Video Tutorials
7. Ongoing Support

The Knowledge Base is a forum for customers to easily search for answers to questions they have about Ce Pretrial. A link to “**Search Knowledge Base**” is available on the right side of the Release Notes screen. When a user clicks the link, they will be directed to the Knowledge Base login screen shown below.



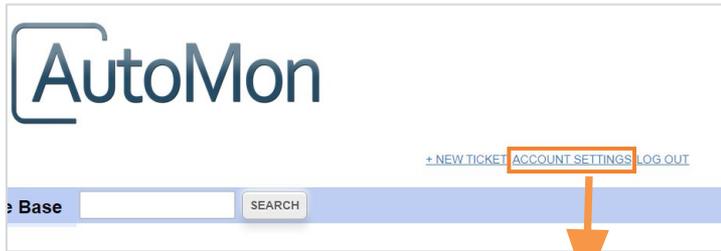
REQUESTING ACCESS TO KNOWLEDGE BASE

If the user has not used Knowledge Base before, they must first request access. To request access, the user must enter their email address and click “**Request Access**”. The user will receive an email with a user ID and temporary password. The email will include a link to login and change their temporary password. That link will direct the user back to the login screen where they can enter the user ID and password to login.



CHANGING TEMPORARY PASSWORD

After signing in to the Knowledge Base with their User ID and temporary password, the user can customize their password by clicking “**Account Settings**” in the upper right corner of the Knowledge Base home screen. This link will direct the user to a page where they can update their name and contact information. They will also be able to choose and confirm a new password.



Change User Settings

First Name	<input type="text" value="Alexa"/>
Last Name	<input type="text" value="Meola"/>
Title	<input type="text" value="Probation Officer"/>
Phone Number	<input type="text"/>
E-Mail	<input type="text" value="alexandrameola@gmail.com"/>

Change Password

New Password	<input type="password" value="....."/>
Confirm New Password	<input type="password" value="....."/>

SEARCHING KNOWLEDGE BASE BY KEYWORD

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



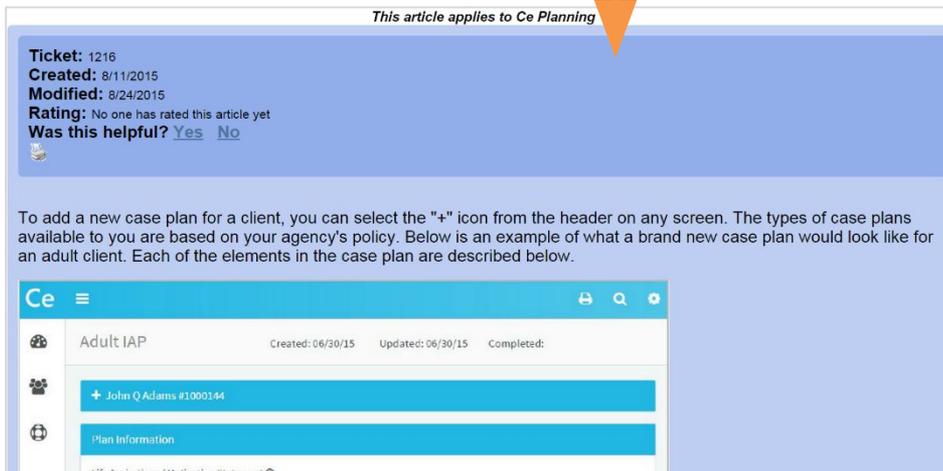
Tickets

Ticket #	Ticket Name	Date Created	Ticket Type
1216	Ce Planning: New Case Plan Screen	8/11/2015 2:14:19 PM	Knowledge Base
1061	Managing Assesseees: Creating a New Assessee Record	7/31/2015 11:37:19 ...	Knowledge Base

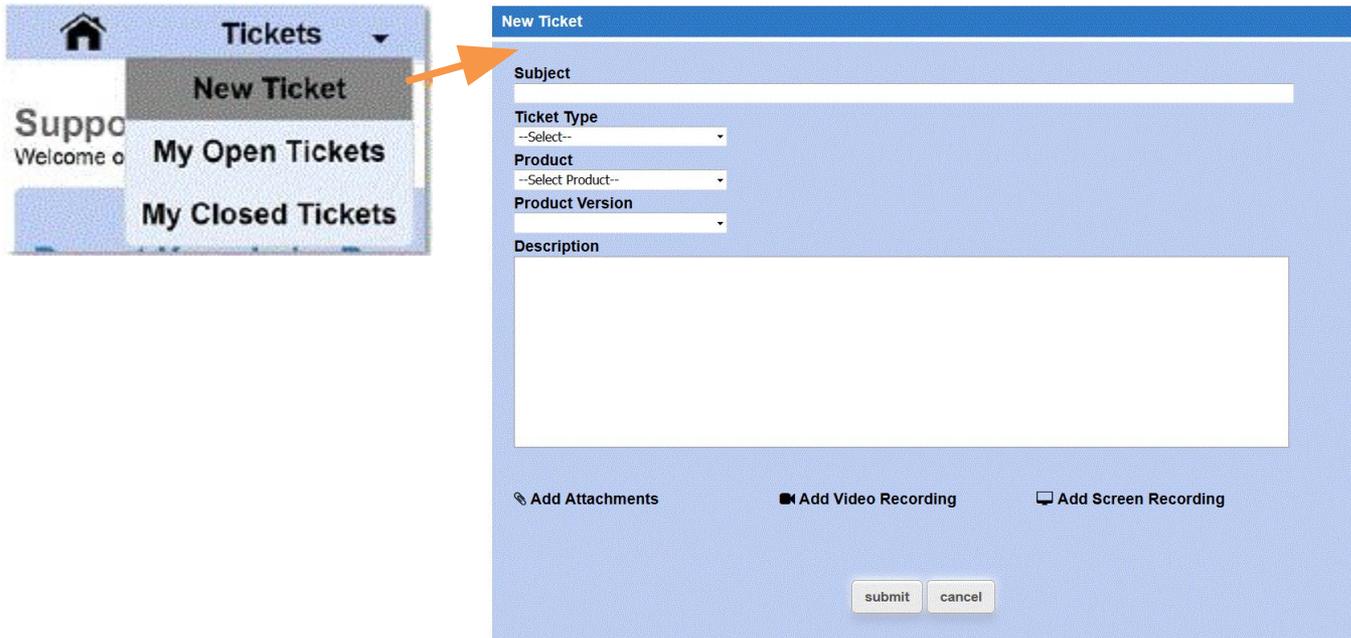
This article applies to Ce Planning

Ticket: 1216
Created: 8/11/2015
Modified: 8/24/2015
Rating: No one has rated this article yet
Was this helpful? [Yes](#) [No](#)

To add a new case plan for a client, you can select the "+" icon from the header on any screen. The types of case plans available to you are based on your agency's policy. Below is an example of what a brand new case plan would look like for an adult client. Each of the elements in the case plan are described below.



Any questions/issues/problems found should first be reported to your Supervisor. If your Supervisor is unable to answer the question and/or resolve the issue, then the Supervisor will report the issue to IT or your agency's designated contact. All relevant information will be necessary to relay to AutoMon (i.e. staff with the question/issue, client and instrument being used at the time of the issue, any error message, what troubleshooting the users involved have completed, etc.) If IT is unable to resolve the issue, IT will then report the issue to AutoMon via Automon's support portal, TeamSupport.

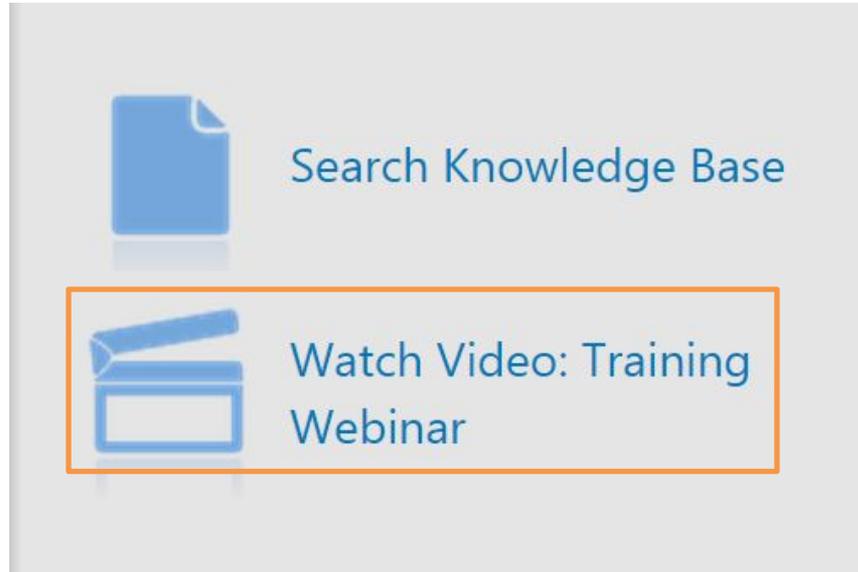


The image shows a screenshot of the AutoMon support portal. On the left, a navigation menu is visible with a 'Tickets' dropdown menu. An orange arrow points from the 'New Ticket' option in the dropdown to the 'New Ticket' form on the right. The form is titled 'New Ticket' and contains the following fields:

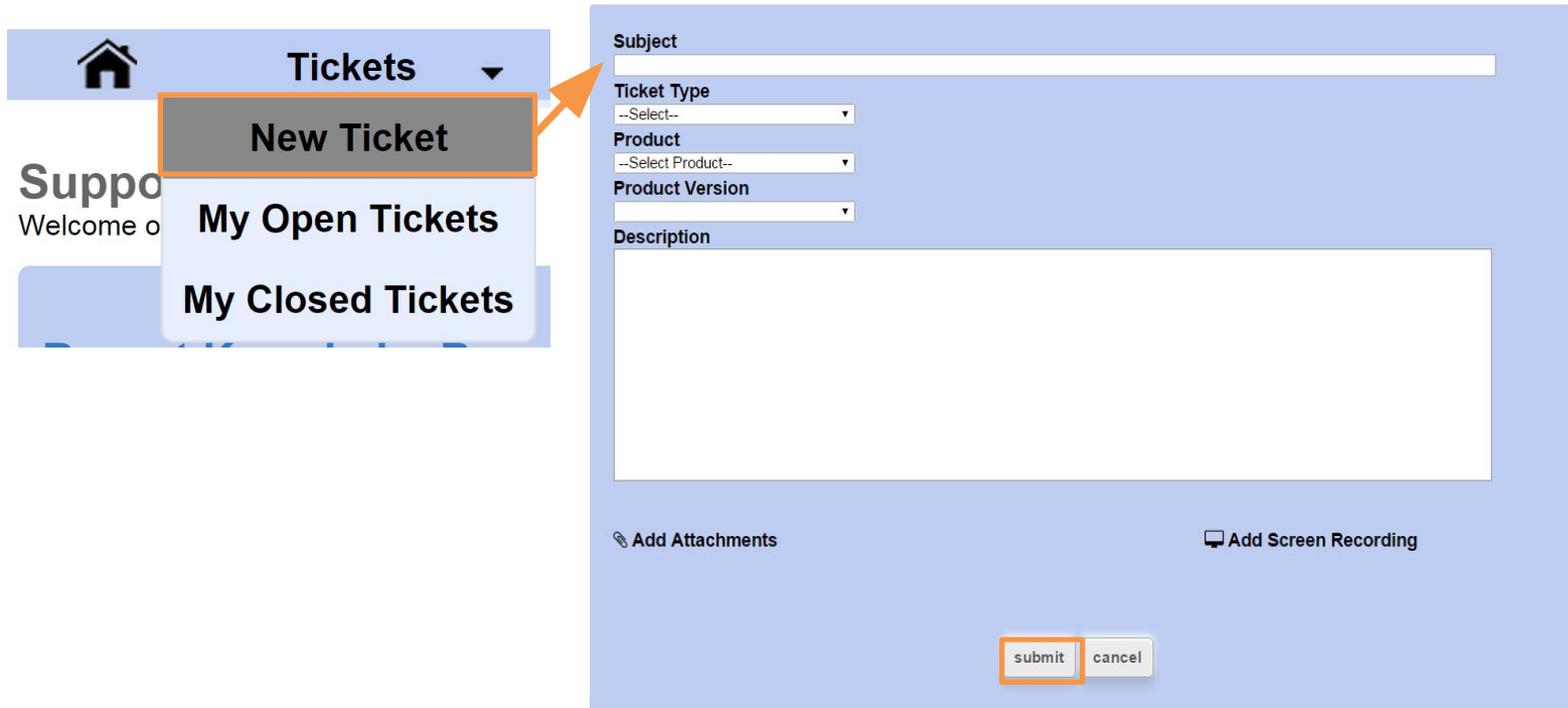
- Subject: A text input field.
- Ticket Type: A dropdown menu with '--Select--' as the current selection.
- Product: A dropdown menu with '--Select Product--' as the current selection.
- Product Version: A dropdown menu.
- Description: A large text area for entering the issue details.

At the bottom of the form, there are three checkboxes: 'Add Attachments', 'Add Video Recording', and 'Add Screen Recording'. Below these are 'submit' and 'cancel' buttons.

AutoMon also has video tutorials and webinars available online for additional help. The videos can be accessed on the right panel of our Release Notes page. You can also access the videos via the links below.



If additional issues arise, the user should reach out to their agency's designated contact for help. If the designated contact cannot solve the problem, he/she may submit a ticket with a description of the problem to TeamSupport on the Knowledge Base page. The ticket will be addressed by AutoMon support. To create a new ticket, click "**Tickets**" in the header on the TeamSupport Screen and select "**New Ticket**". Then, describe the issue in the form provided and click "**submit**" to send.

The screenshot shows the TeamSupport interface. On the left, a navigation bar contains a home icon, a "Tickets" dropdown menu, and a "Support" section with a "Welcome o" message. The "Tickets" dropdown is open, showing three options: "New Ticket" (highlighted with an orange border and an orange arrow pointing to the form), "My Open Tickets", and "My Closed Tickets". The main form area is light blue and contains the following fields: "Subject" (text input), "Ticket Type" (dropdown menu with "--Select--"), "Product" (dropdown menu with "--Select Product--"), "Product Version" (dropdown menu), and "Description" (large text area). At the bottom of the form, there are two buttons: "Add Attachments" and "Add Screen Recording". At the very bottom of the form, there are two buttons: "submit" (highlighted with an orange border) and "cancel".

Training Review & Wrap-up

Now, you should be able to:

1. [Logging In](#)
2. [CePretrial Navigation](#)
3. [Reporting Dashboard](#)
4. [Calendar](#)
5. [Task](#)
6. [Analysis](#)
7. [Access and Set Alerts](#)
8. [Opening a New Pretrial Case](#)
9. [Defendant Information](#)
10. [Defendant Overview](#)
10. [Merging Defendants](#)
11. [Send a New Message](#)
12. [Case Notes and Bookmarking](#)
13. [Search](#)
14. [New Enrollment PIN](#)
15. [SMS Chat Feature](#)
16. [Filtering Alerts and Notification Preferences](#)
17. [User Drop-down or Sign Out](#)
18. [Accessing TeamSupport](#)



ADDITIONAL CONTACT INFORMATION

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COMMENTS

Your feedback is important to us and will help provide the most accurate and up-to-date information possible in our documentation. Please send comments or suggestions by email to support@automon.com.

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CONTACT

AutoMon, LLC
6621 N. Scottsdale Road
Scottsdale, AZ 85250
Phone: 480.386.8555

For Technical Support, visit [AutoMon Support Portal](#)

For Product Information, please email info@automon.com