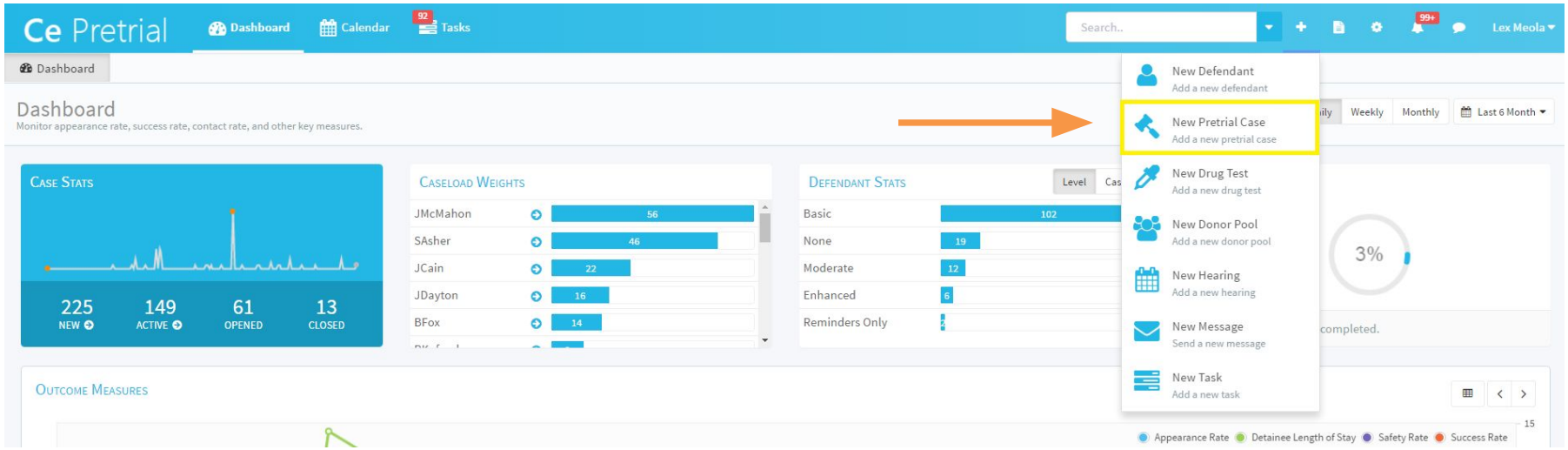
CePretrial

OPEN PRETRIAL CASE

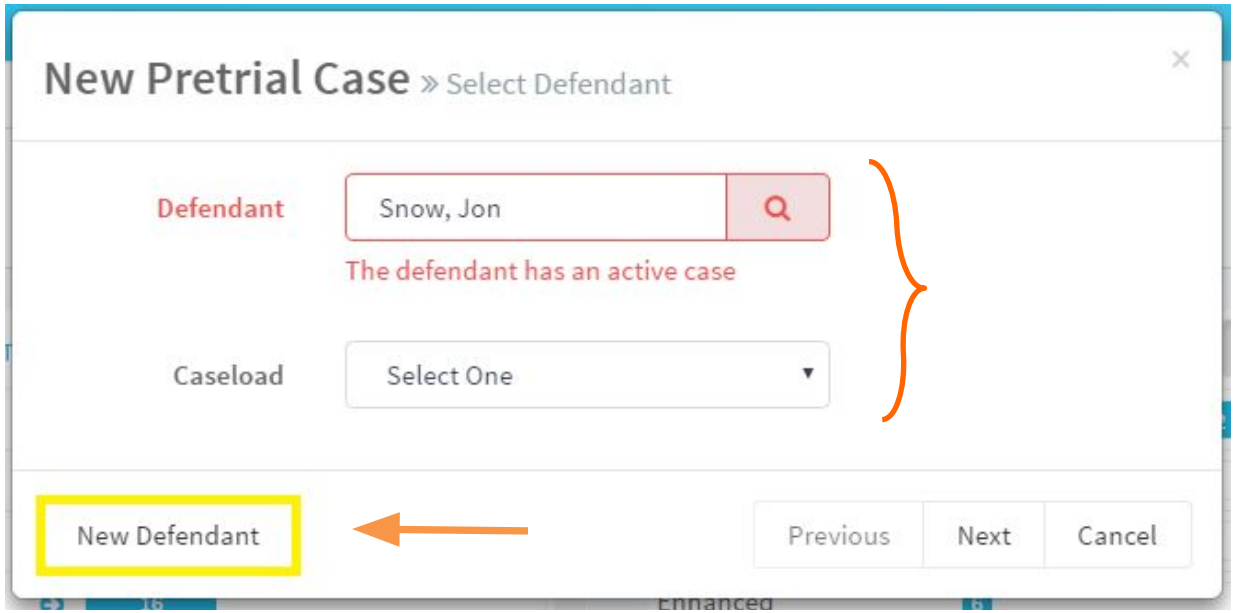
Navigate To New Pretrial Case

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



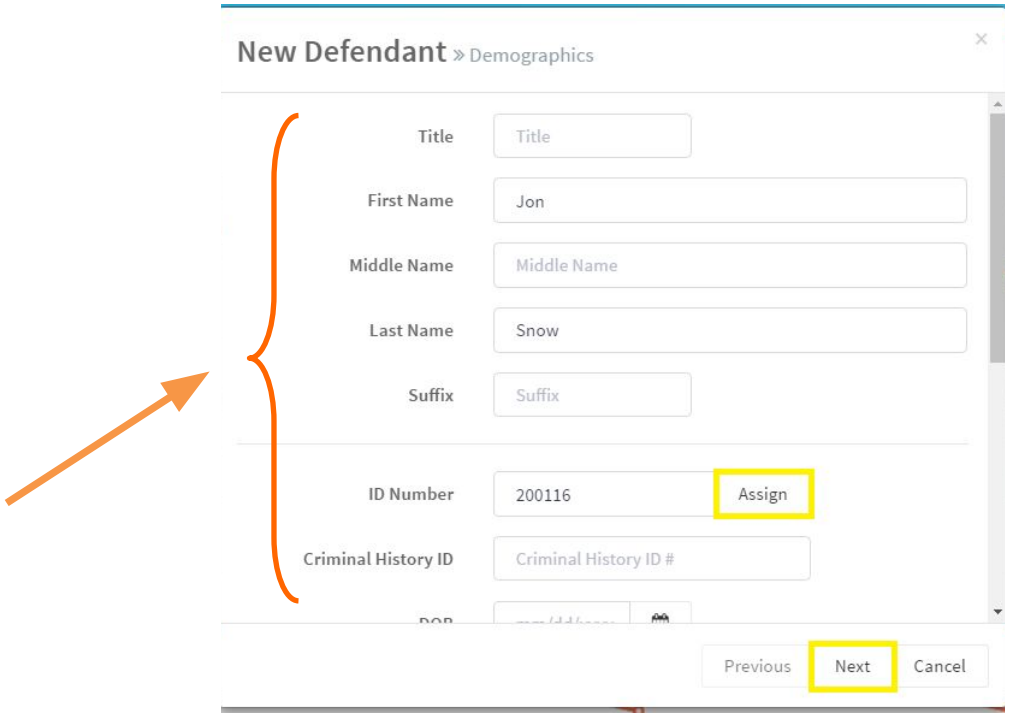
New Pretrial Case

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.



Add A Defendant's Demographics

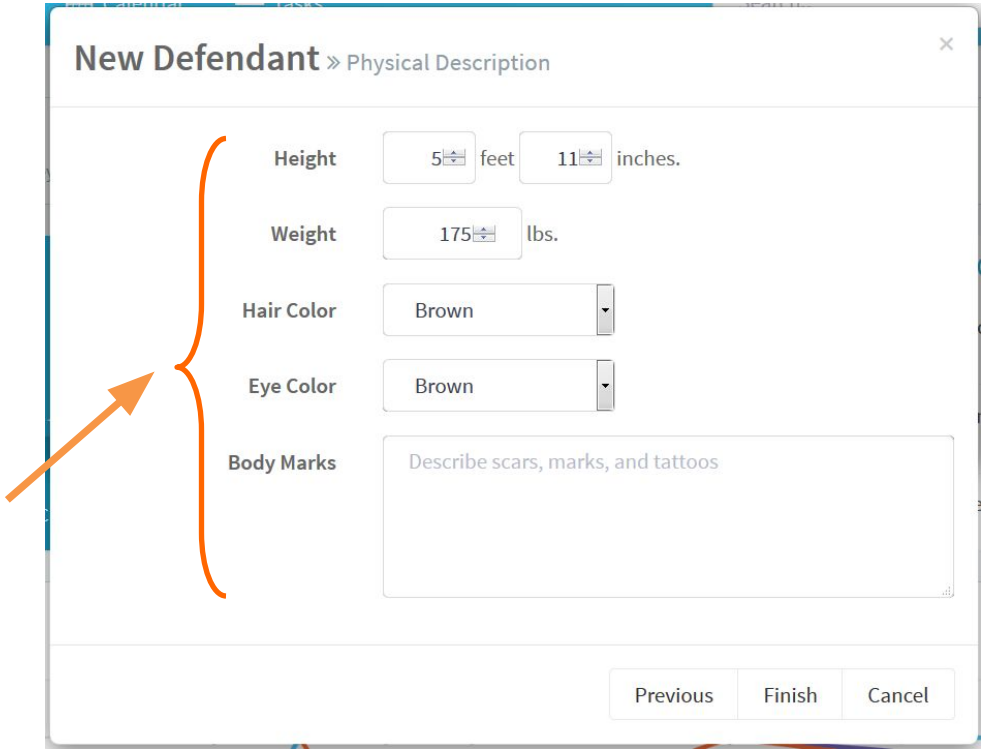
Once you are on the New Defendant page, to add a Defendant's demographics you must fill in the text field boxes with the Defendant's name, ID number, date of birth, gender, primary language and race. There is also the ability to select their ethnicity as being of Hispanic origin. Defendant demographics 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.



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

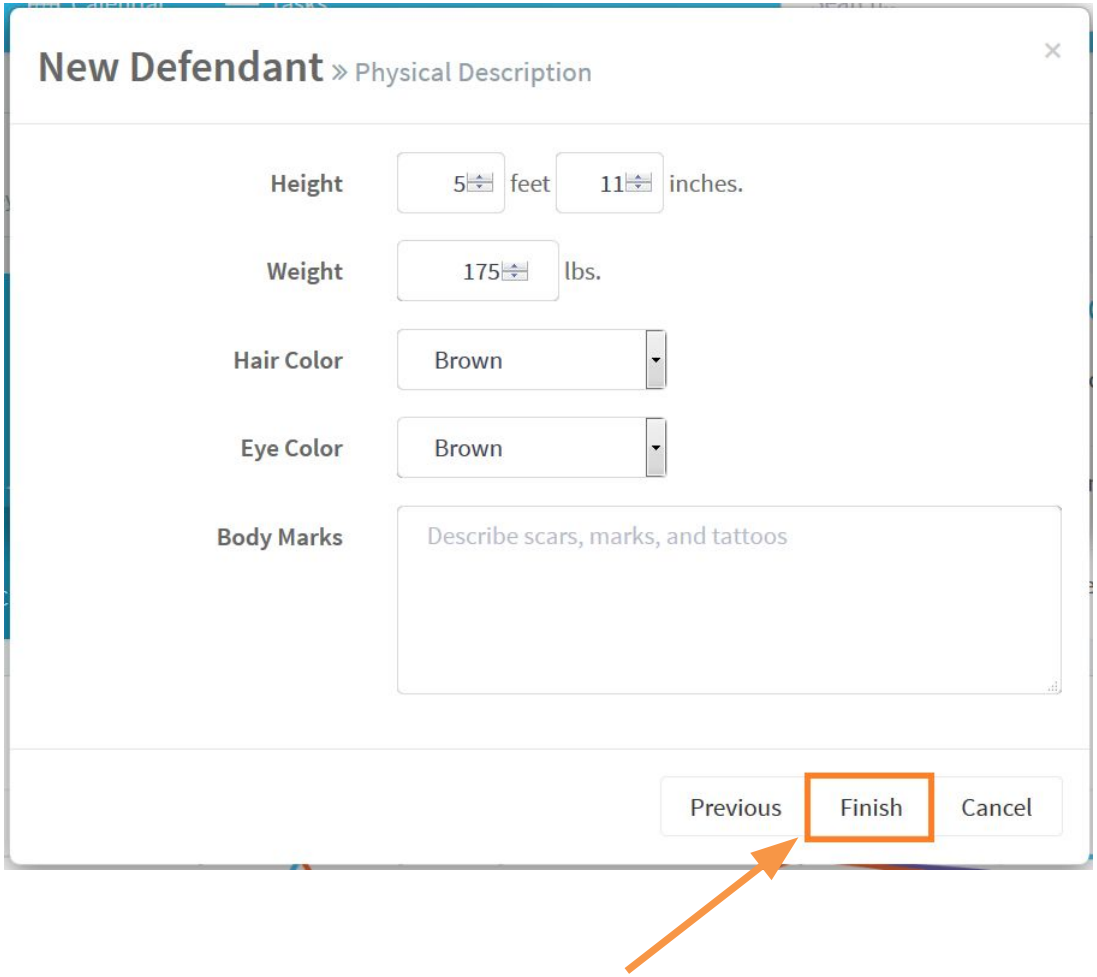
To add a Defendant's Physical Description fill in the text field boxes with their height in feet and inches, weight in pounds, hair color, eye color and any additional body marks, scars or tattoos.



Note: Body Marks must be separated by commas.

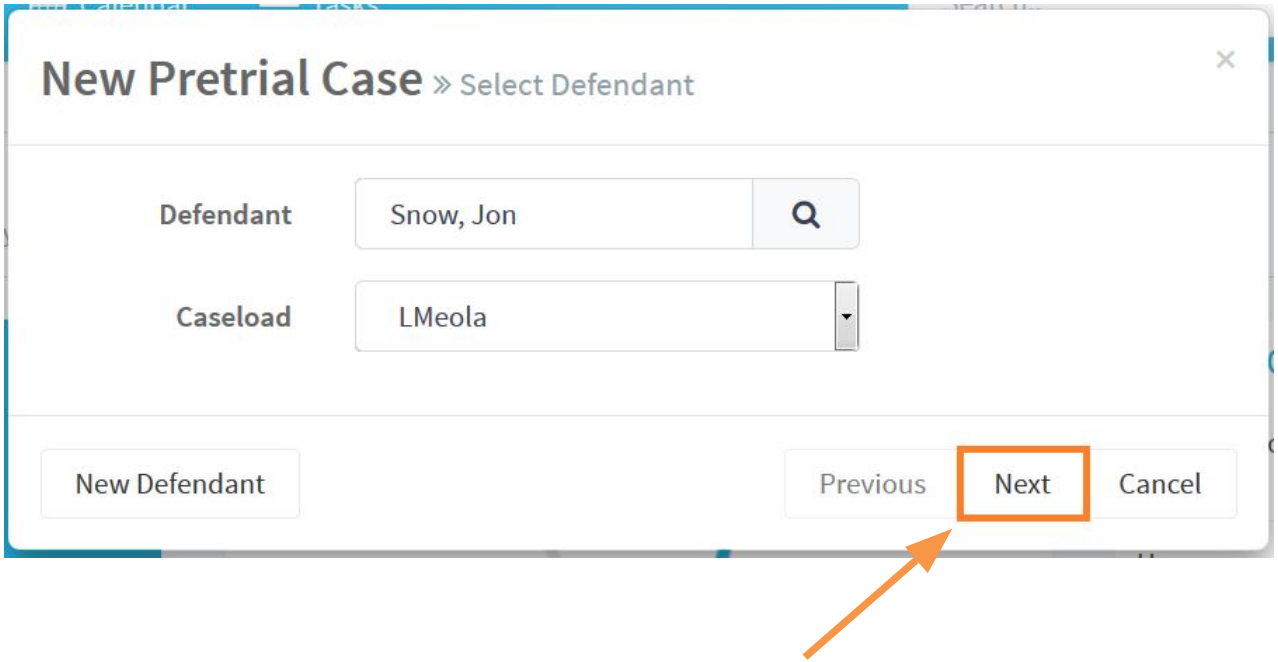
Save Changes To A Defendant

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.



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.



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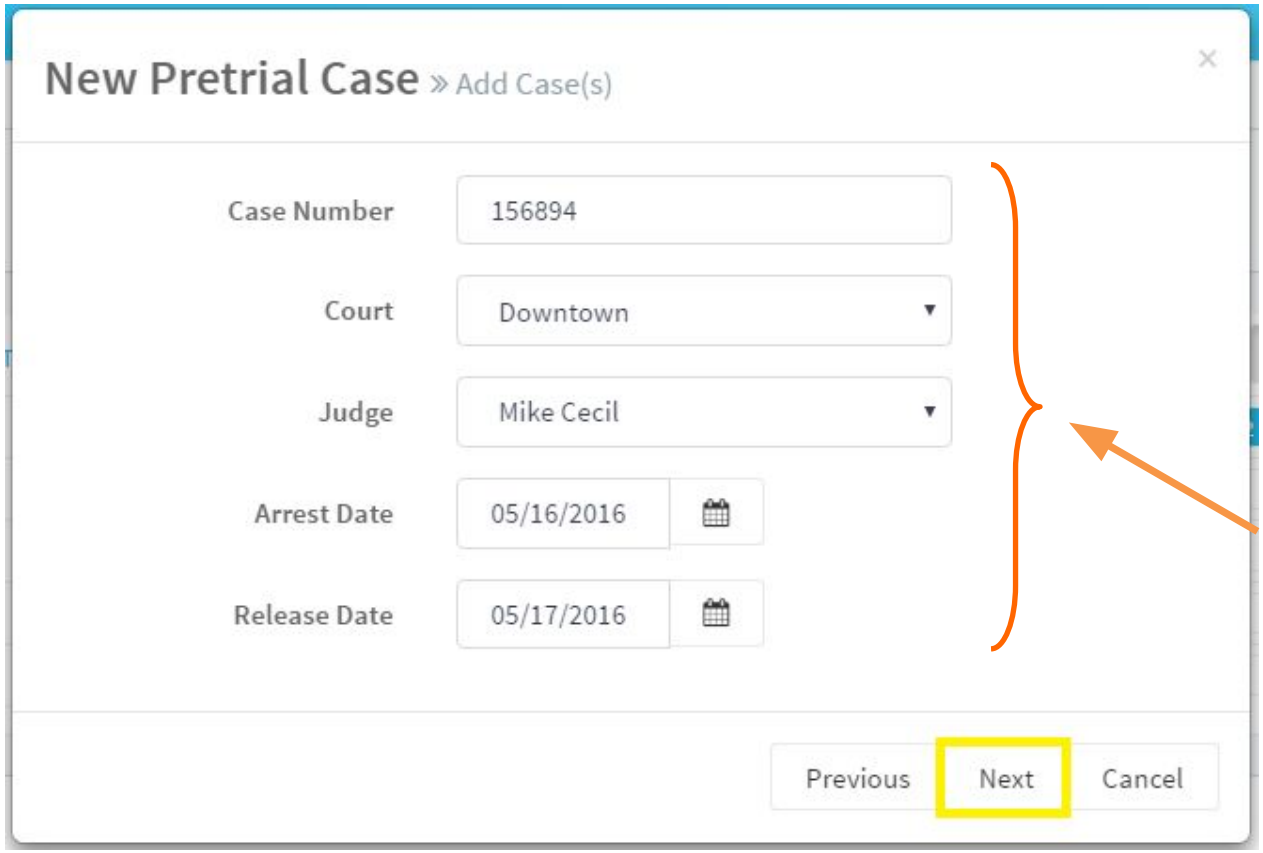
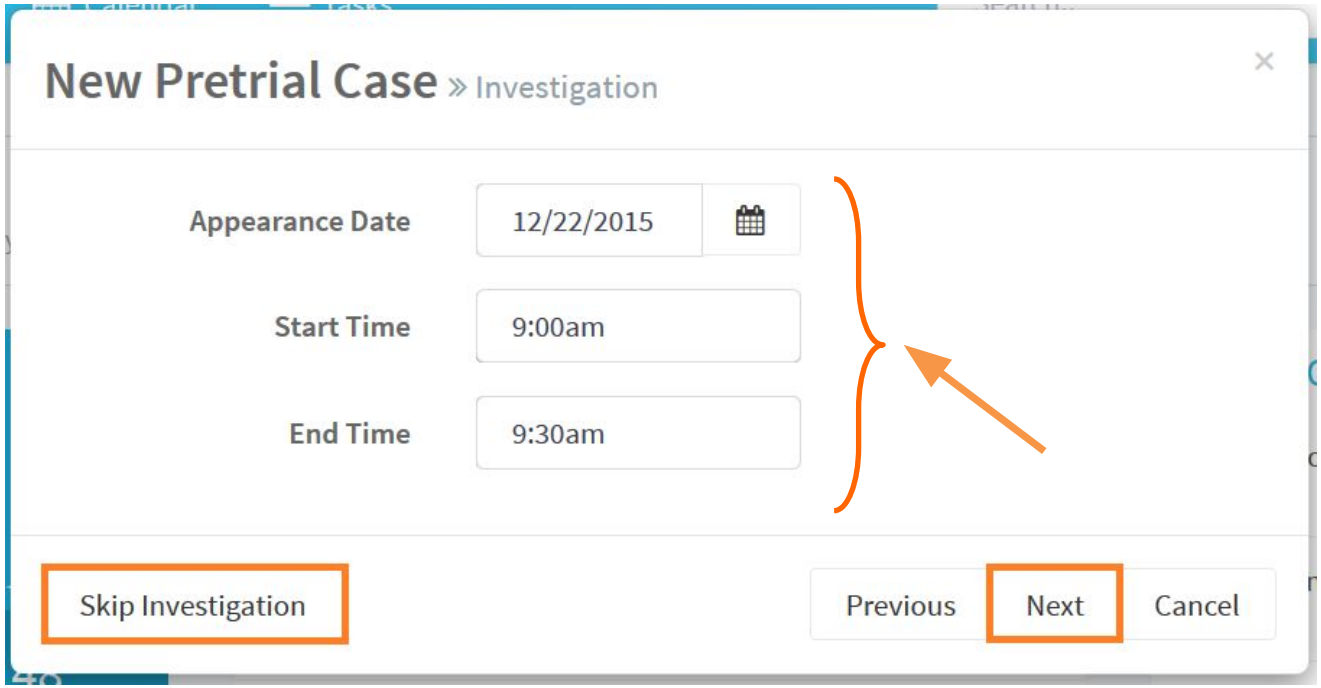
Adding A new pretrial Case - Continued

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.



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.



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.

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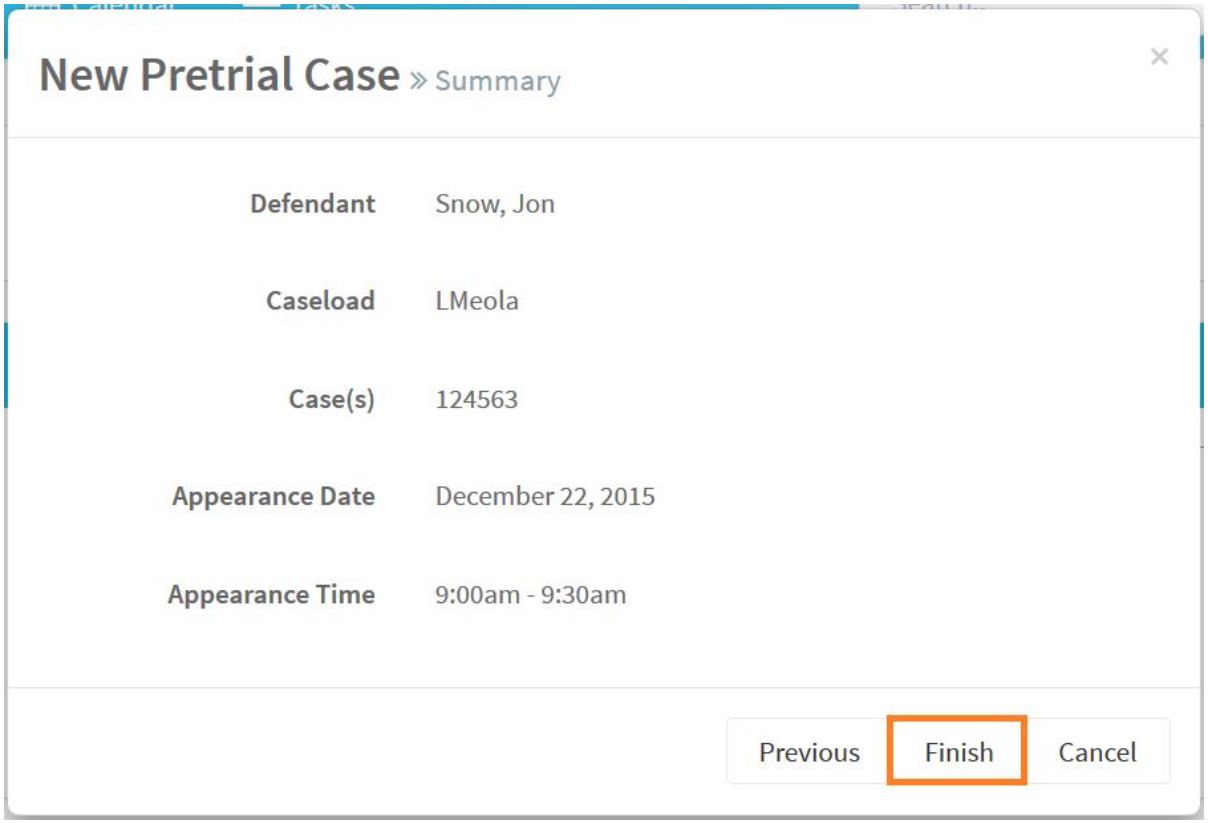
New Pretrial Case Summary

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.



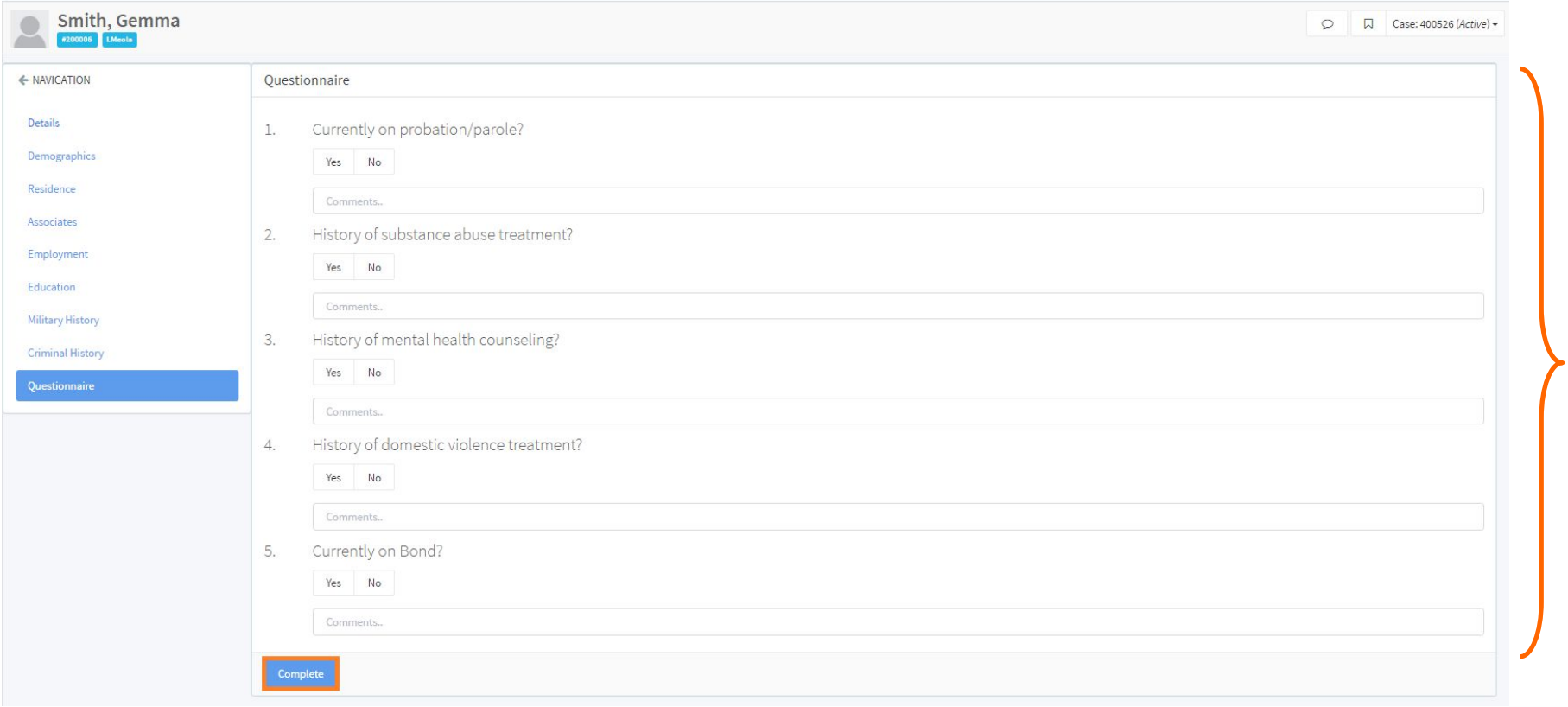
Topic 9: Defendant Information

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

Investigation - Interview Cont'd

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



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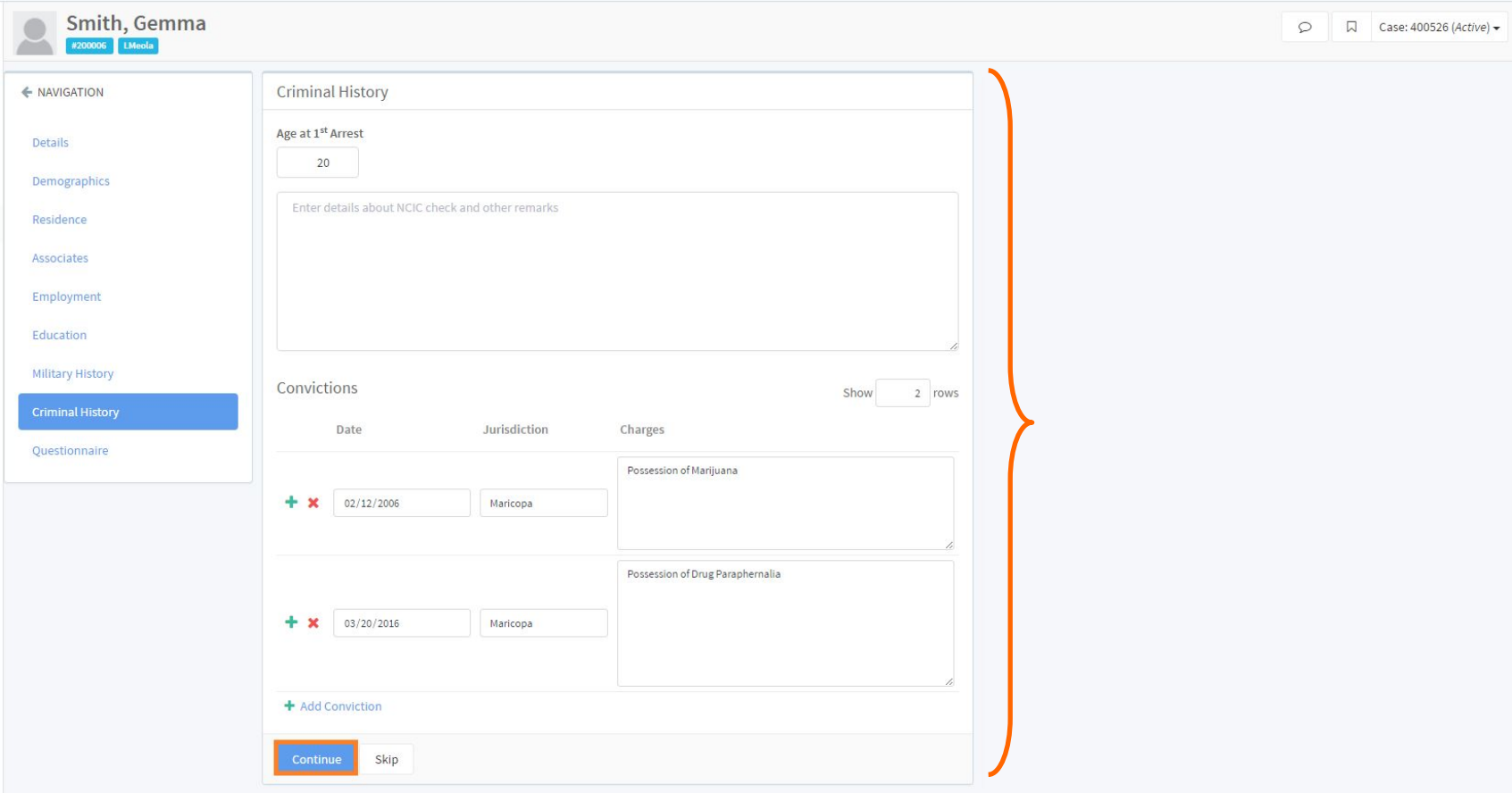
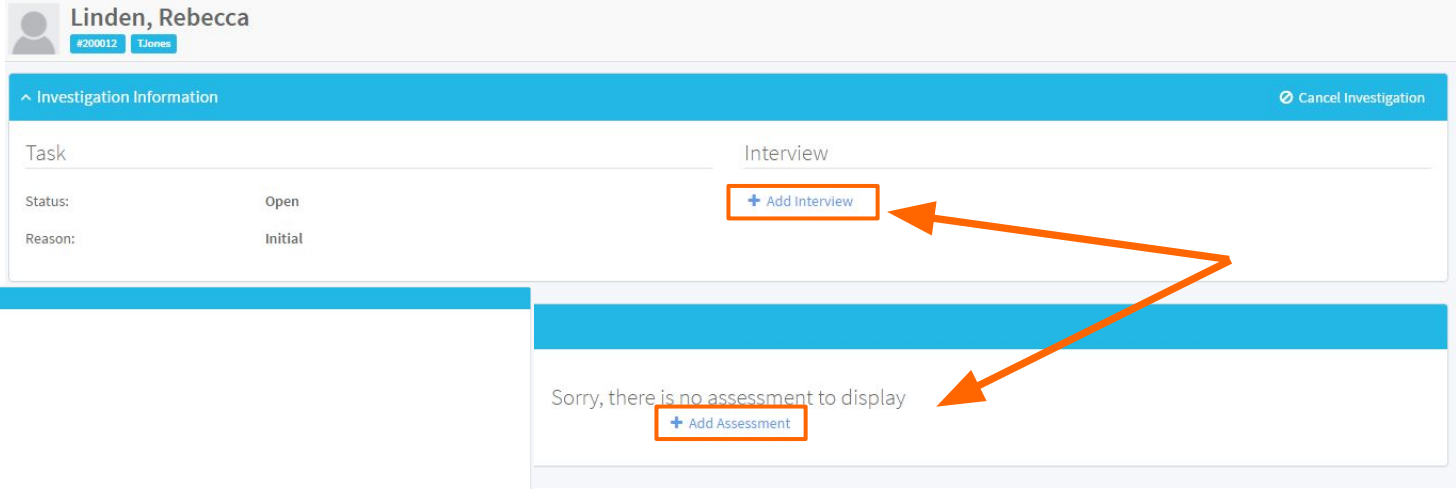
Investigation - Interview Cont'd

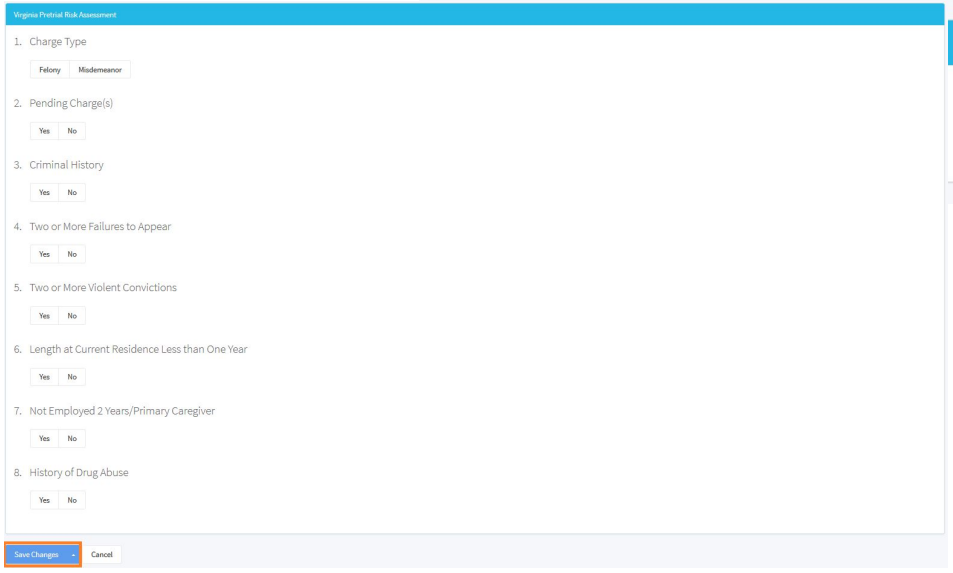
To enter Criminal History, the User has the option to enter the age at first arrest, additional details in a free-text box, and any prior convictions with their associated Date, Jurisdiction, and Charges.



Investigation

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.





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	

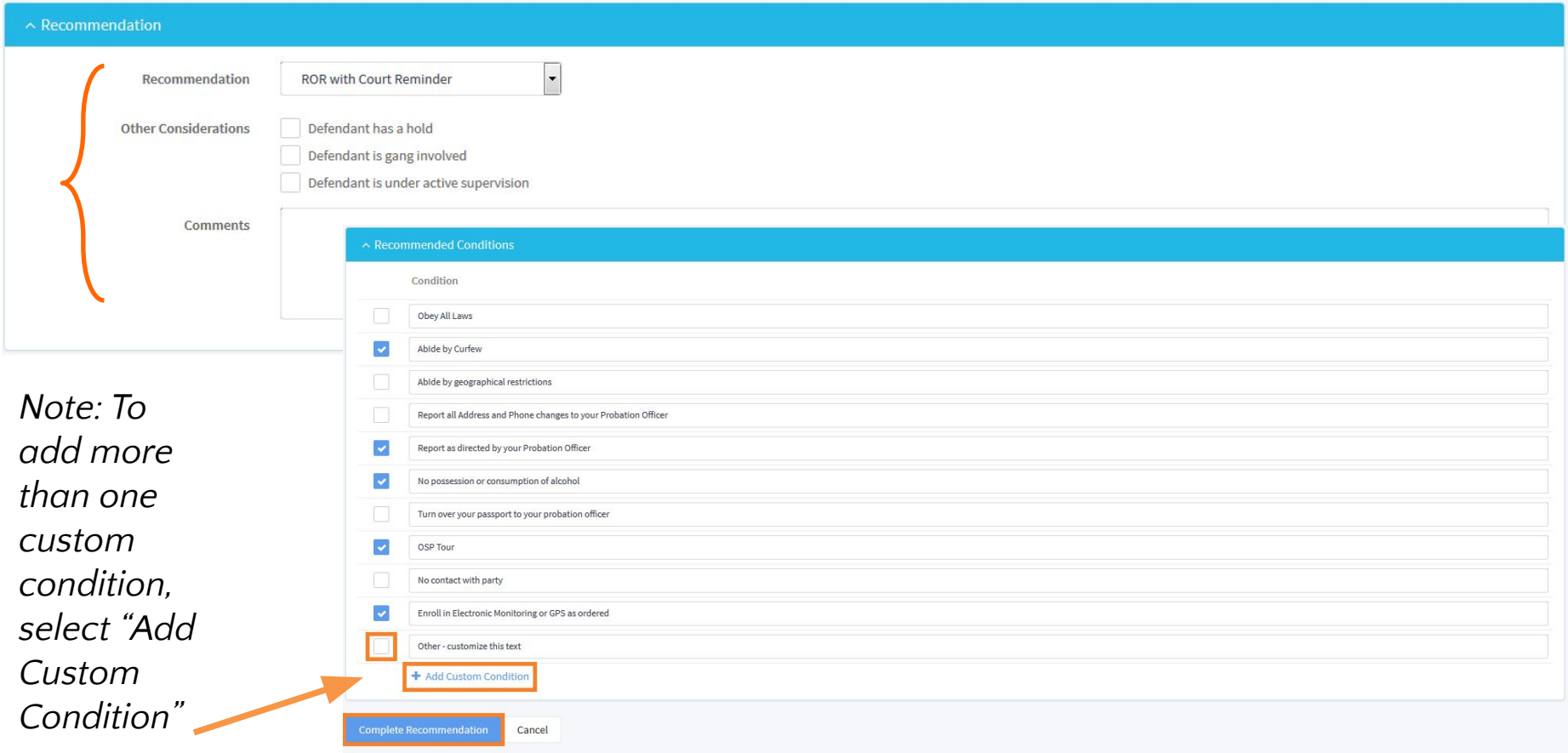
*No Release based on crime category

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.



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

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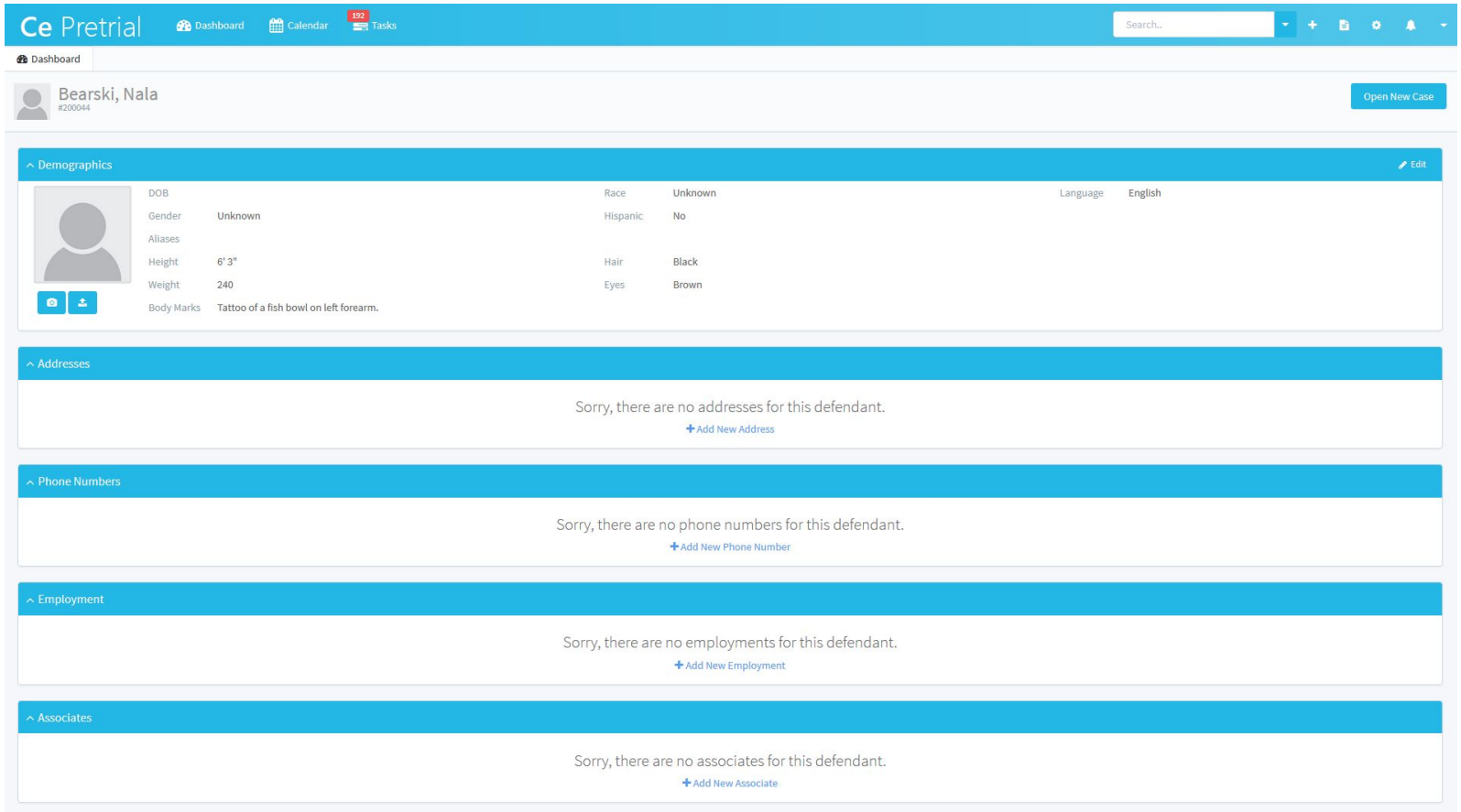
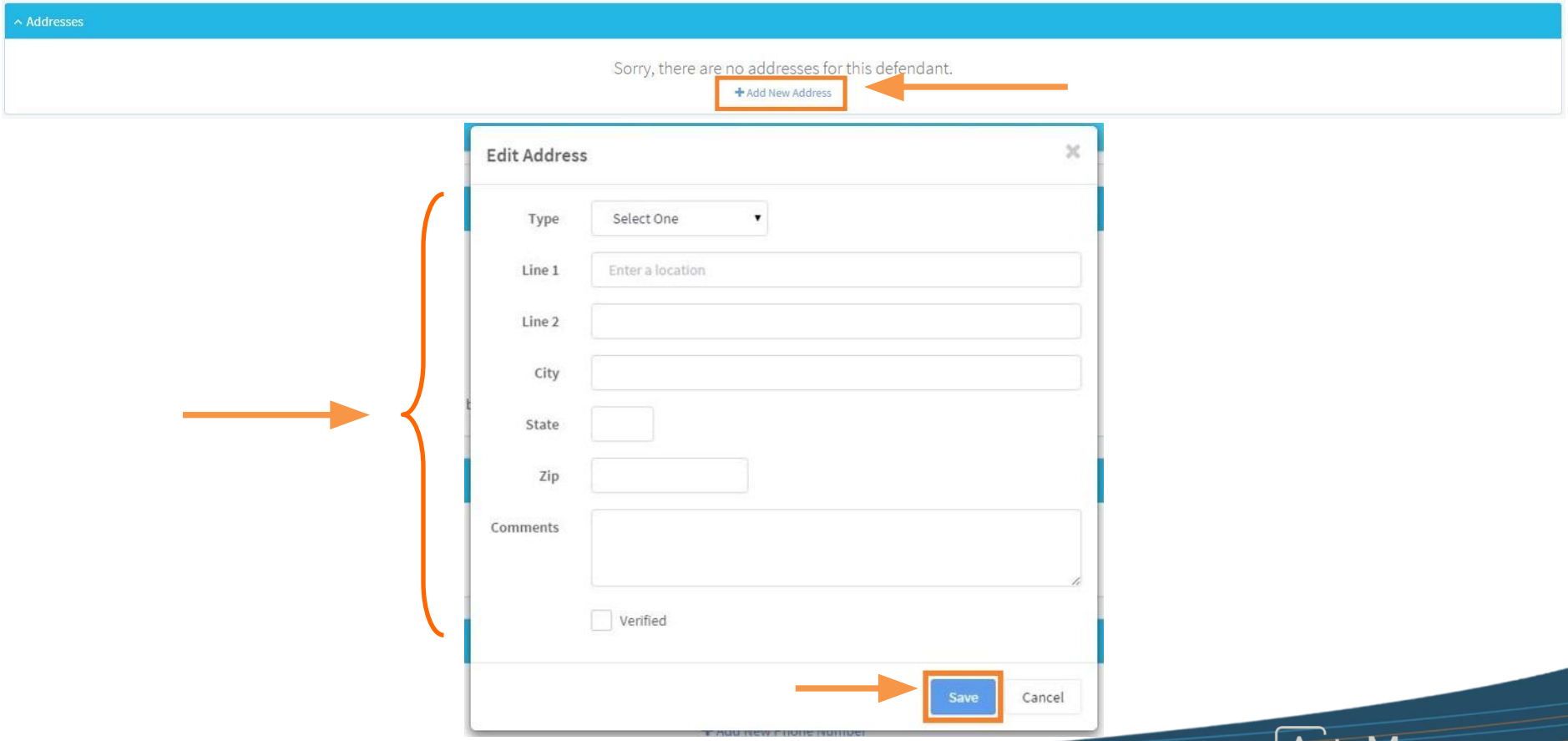
Adding Additional Defendant Information

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.



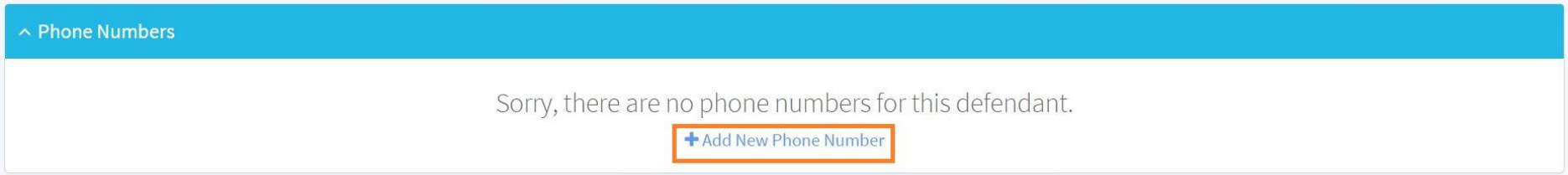
Add A Defendant's Address

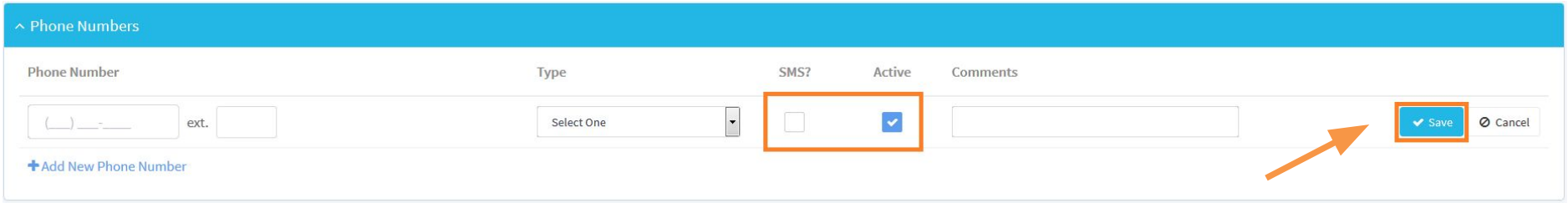
To Add A Defendant's Address, the user will need to click on "Add New Address" to be brought to the prompt that allows you to add and edit addresses. Once the Edit Address box pops up, the user will fill in the address type, address, city, state, zip and any additional comments. The ability to check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



Add A Defendant's Phone Number

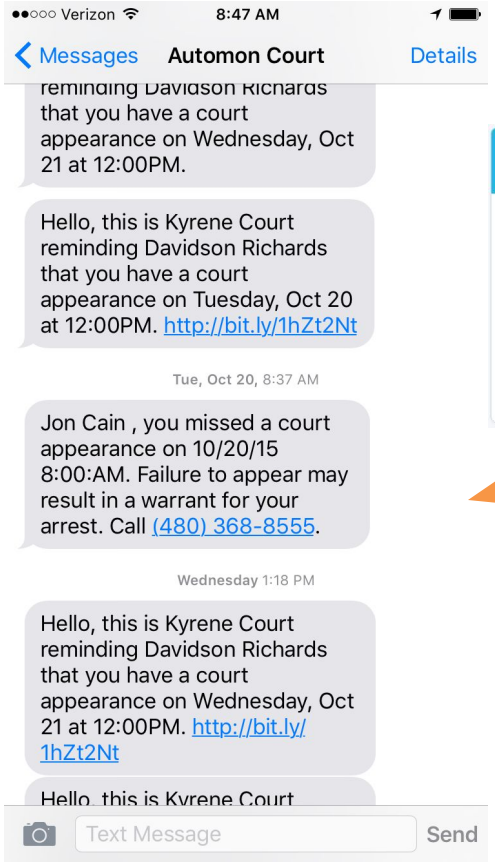
To Add A Defendant's Phone Number, the user will need to click on "Add New Phone Number" to expand the Phone Numbers section that allows the addition of new phone numbers. The user will be able to add the Defendant's phone number, extension, dictate the type of phone number, determine whether the phone 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.

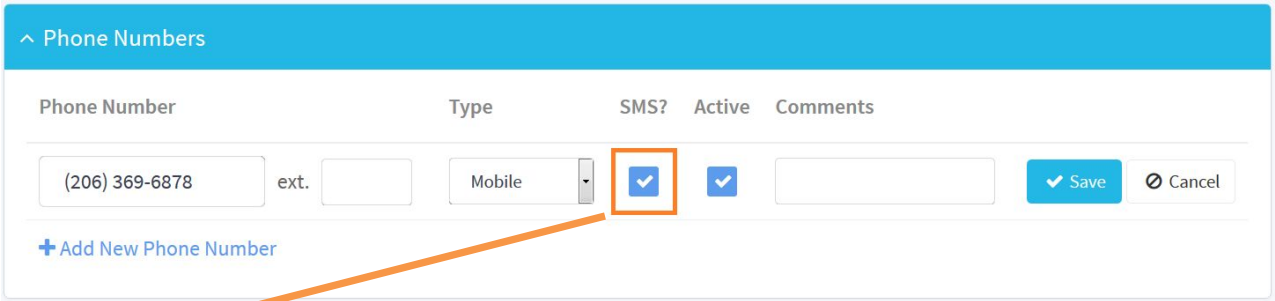




SMS Text Reminders

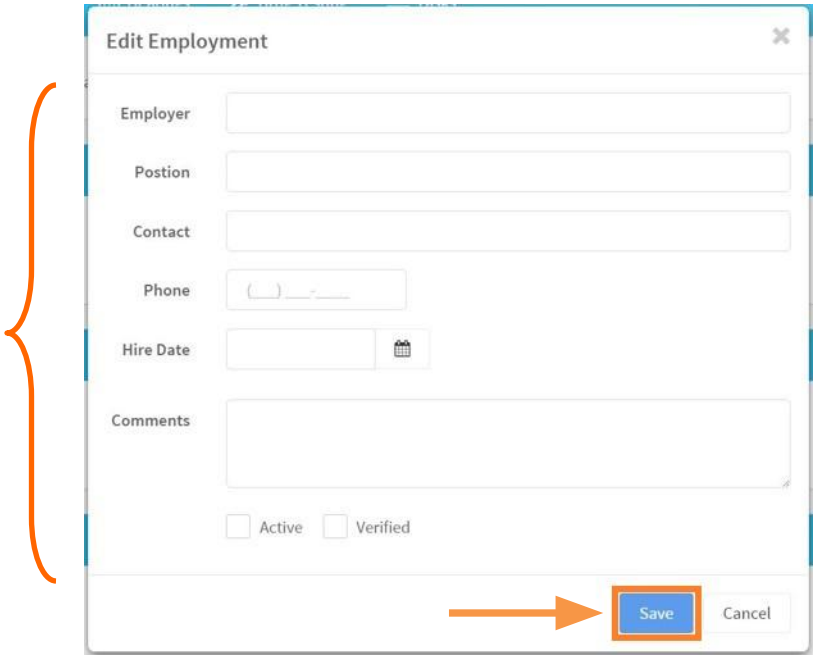
If a defendant's mobile number has been designated as SMS compatible, they can expect to receive notifications from the application when they have a hearing, upcoming contact requirement, and/or drug test. Defendants will be notified two days before a hearing and upcoming contact and one day before a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





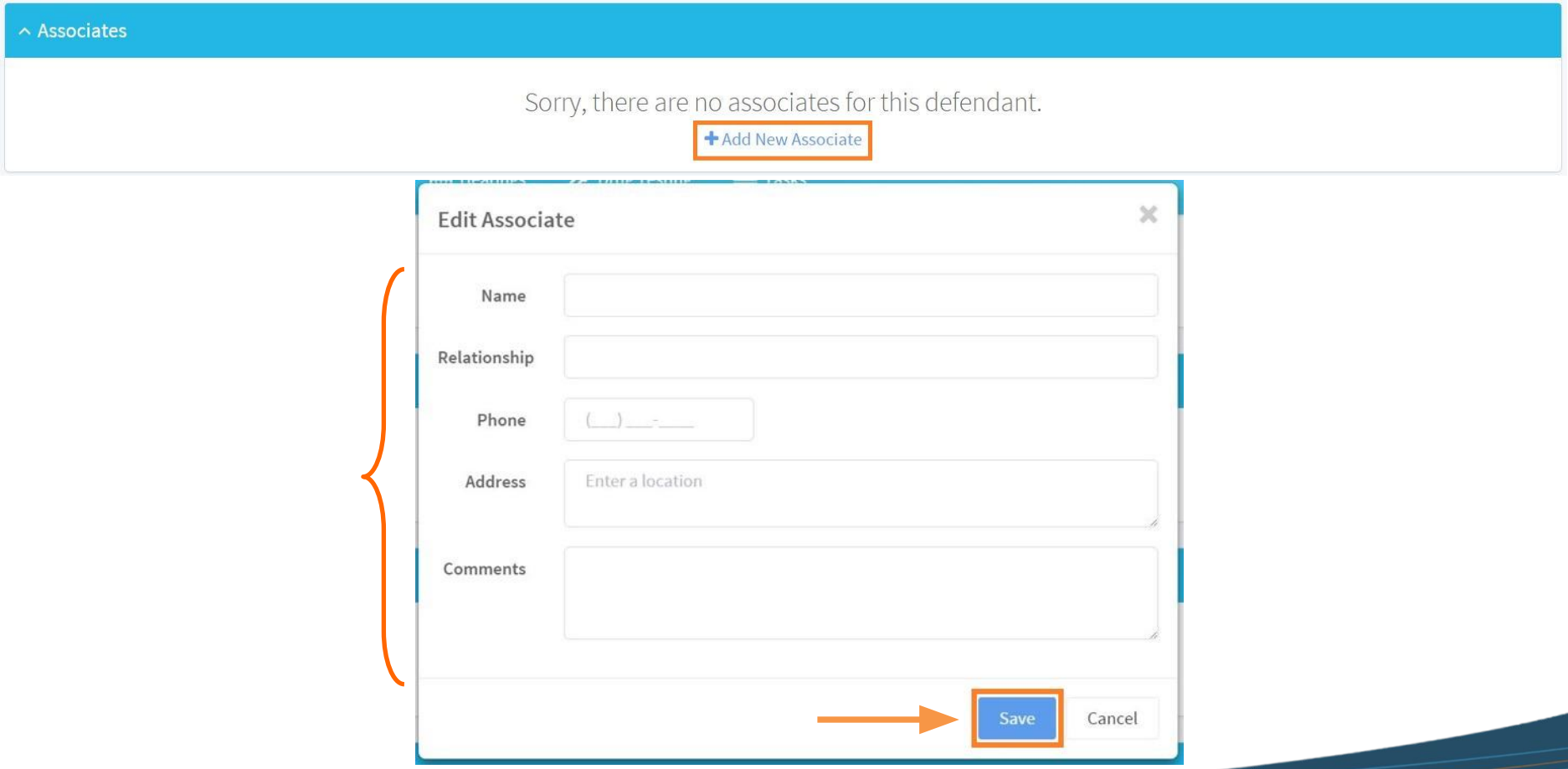
Add A Defendant's Employment

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.



Add A Defendant's Associates

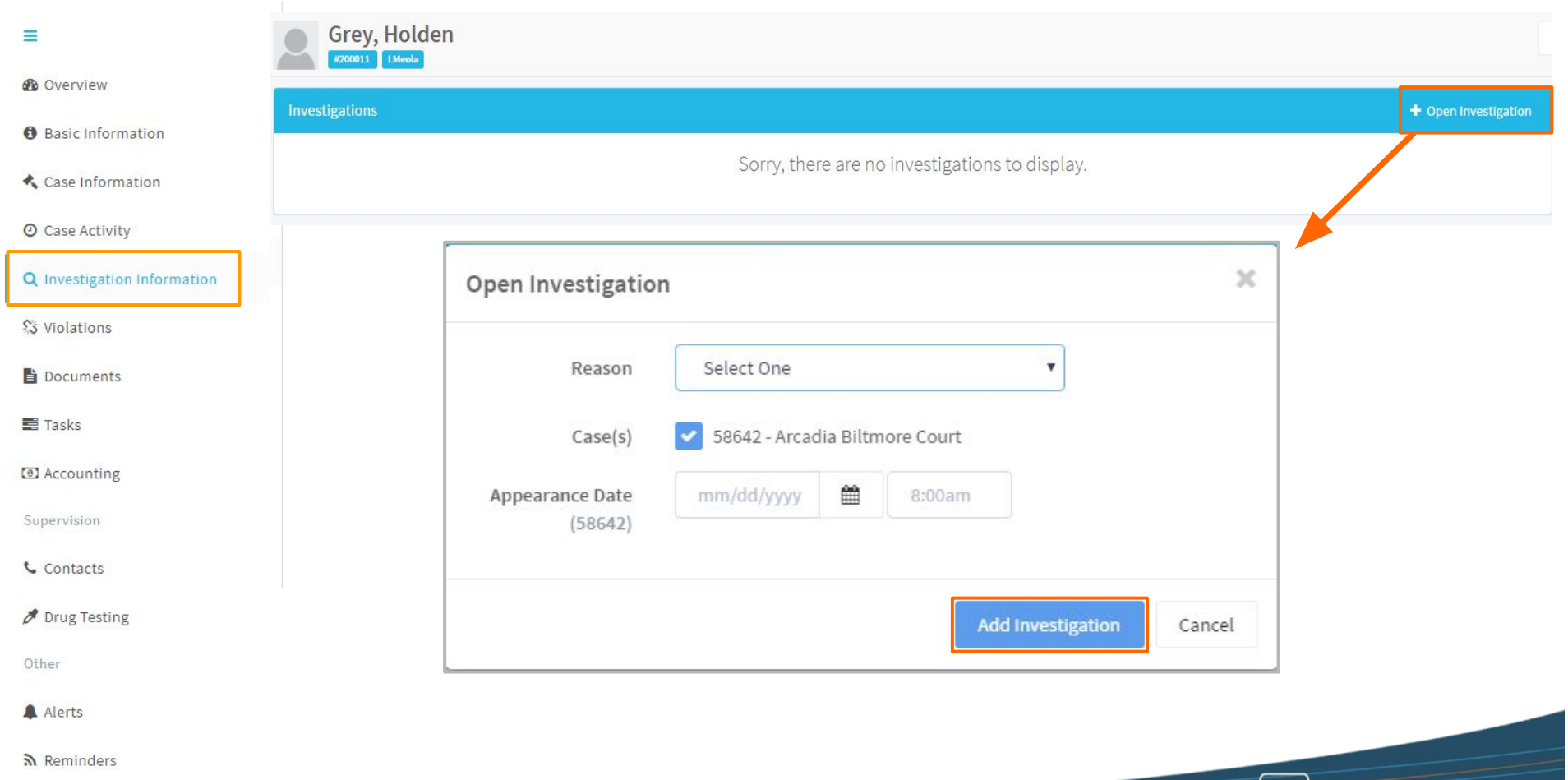
To Add A Defendant's known Associates, the user will need to click on "Add New Associate" to bring up the prompt that allows the user to add any known associates. The user will be able to add the Associate's name, relationship to the defendant, phone number, address, and any additional comments. The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



CePretrial

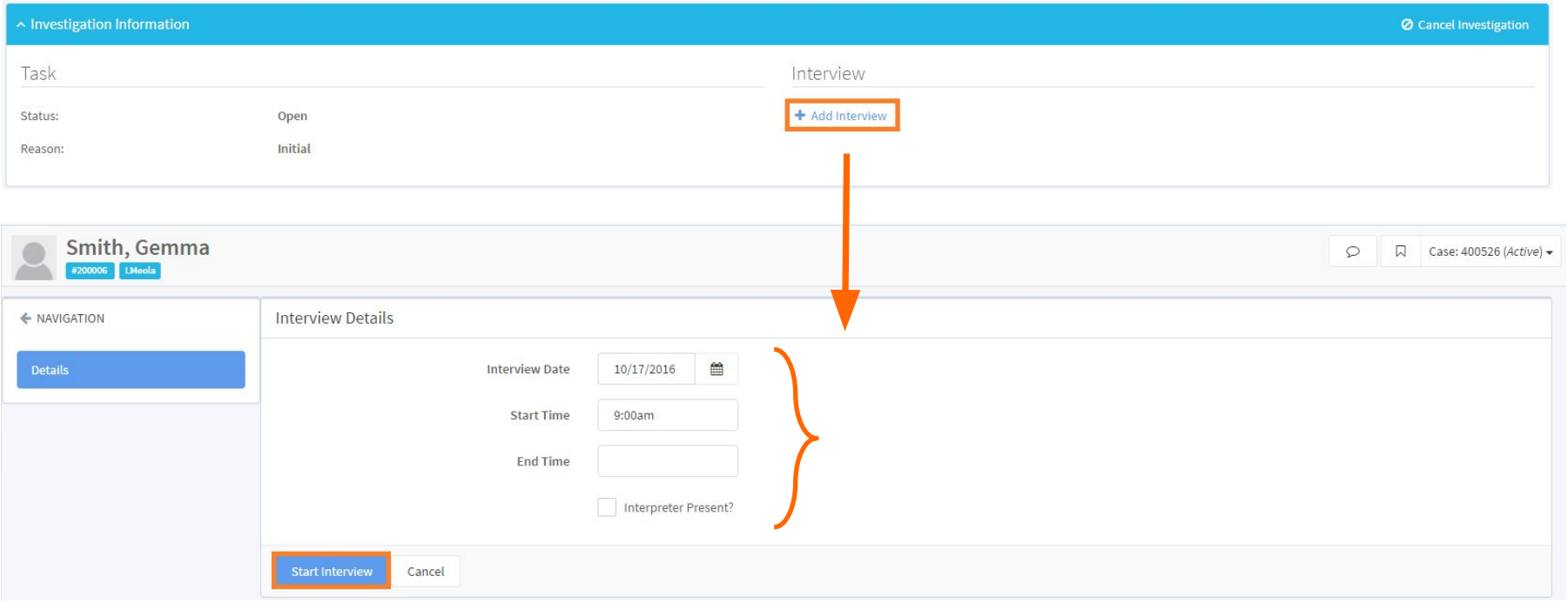
Investigation

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.”



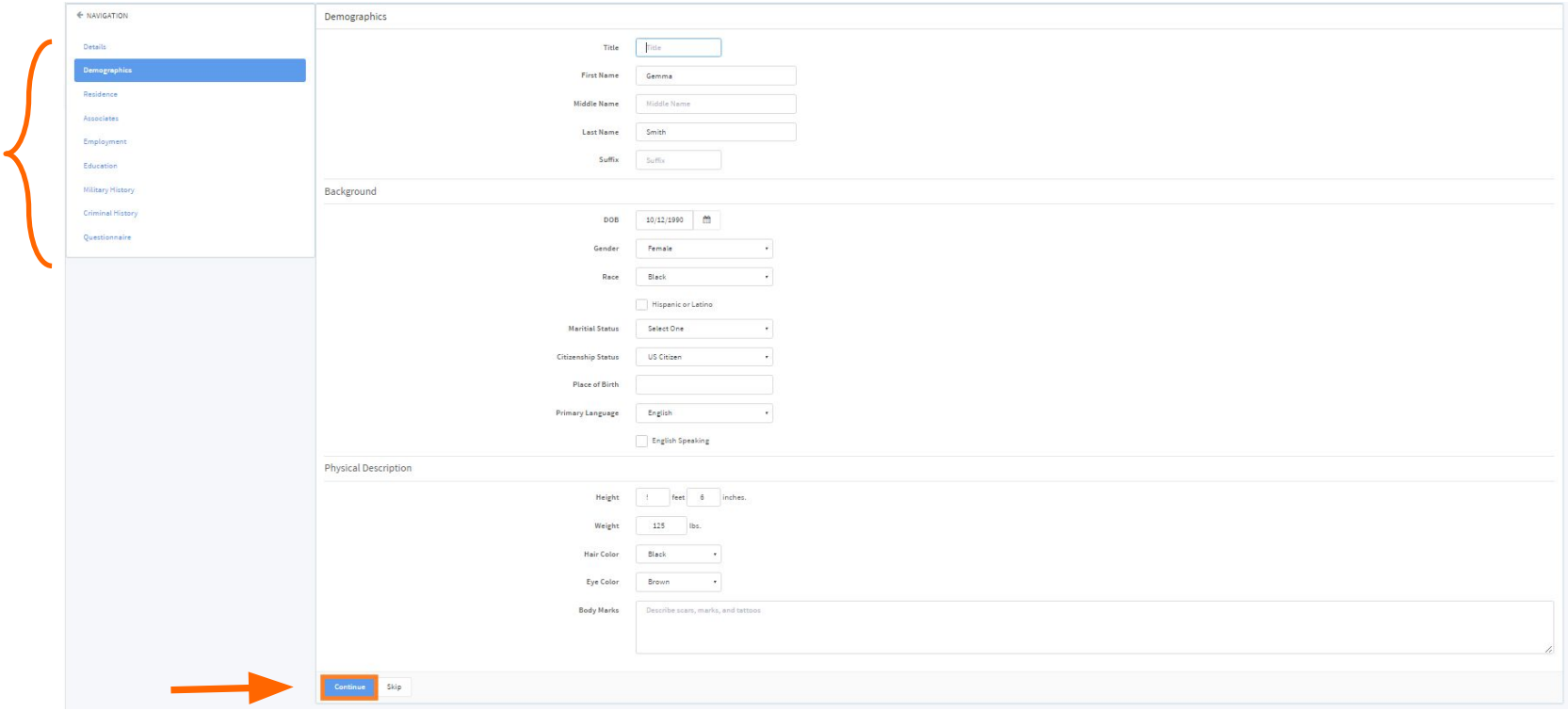
Investigation - Interview

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.”



Investigation - Interview Cont'd

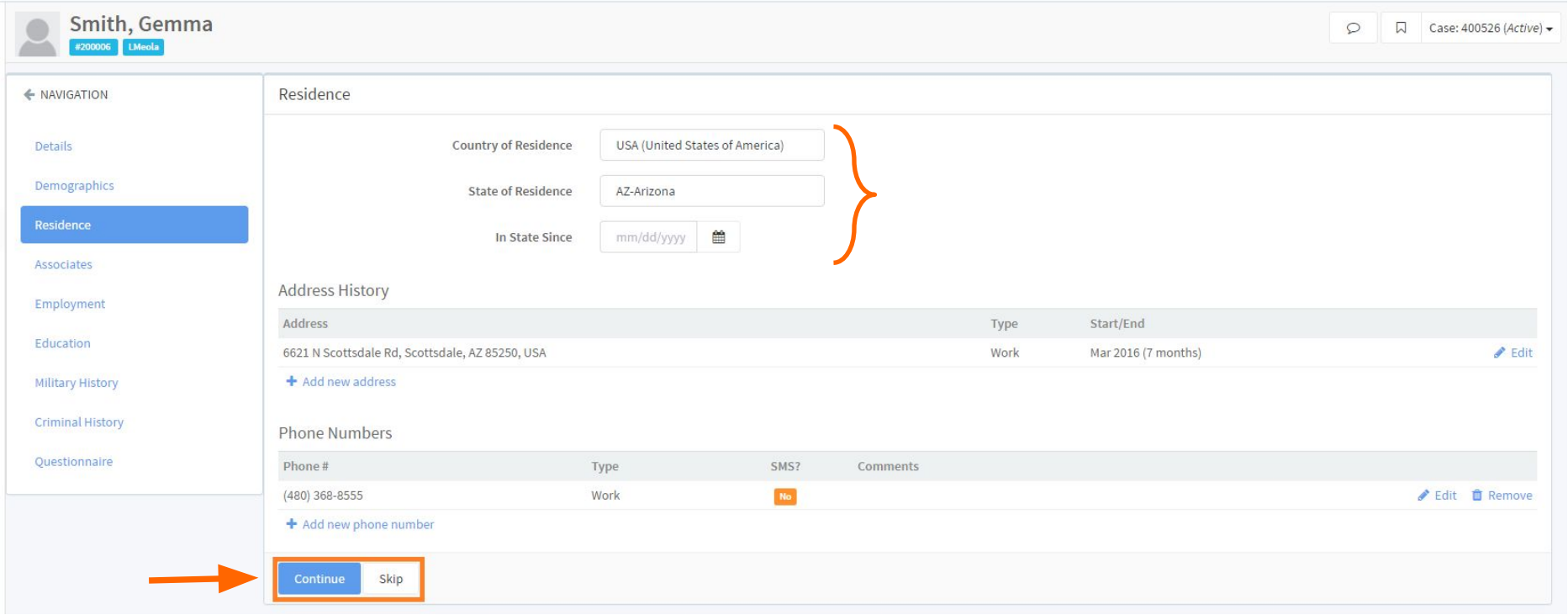
Once the User selects "Start Interview," they will be brought through the workflow of the standard Interview within *Ce Pretrial.*



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.

Investigation - Interview Cont'd

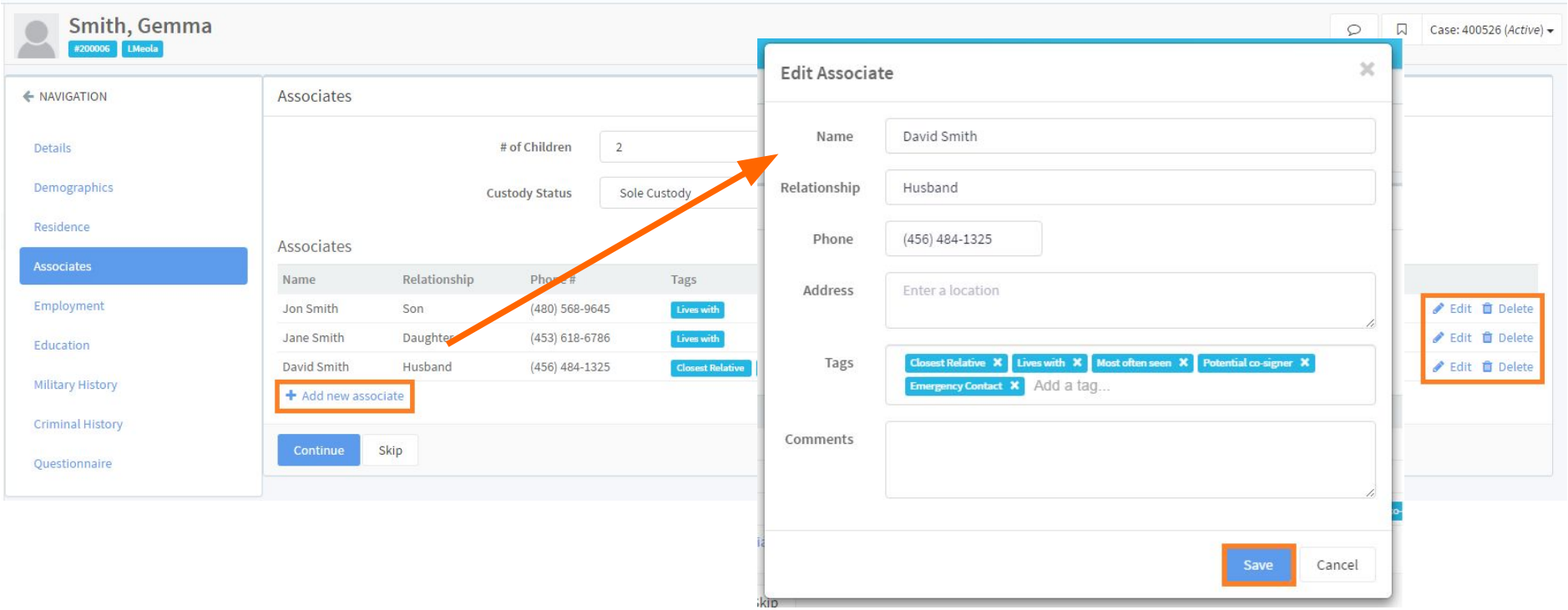
To enter Residential information, the User has the ability to enter the Country and State of Residence, the duration of time the Defendant has lived in the state, as well as an Address History and Telephone Numbers.



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

Investigation - Interview Cont'd

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.



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

Investigation - Interview Cont'd

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."

Smith, Gemma
#200006 LMeola
Case: 400526 (Active)

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

Employment

Employment Status: Employed, Full-time

Monthly Income: $ 2500 .00

Employment History

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

+ Add new employment

Continue Skip

Edit Employment

Employer: Target

Postion: Client Services

Contact: Amelia Burns

Phone: (456) 874-6541

Hire Date: 05/10/2012

Termination Date: mm/dd/yyyy

Comments:

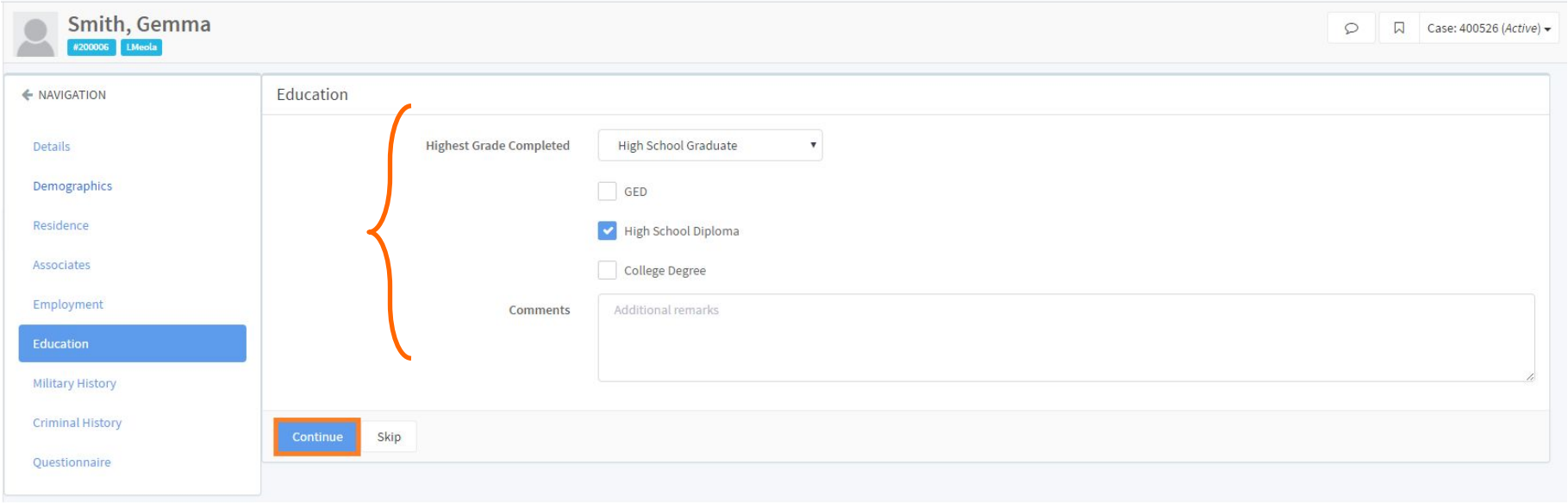
☑ Active ☑ Verified

Save 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."

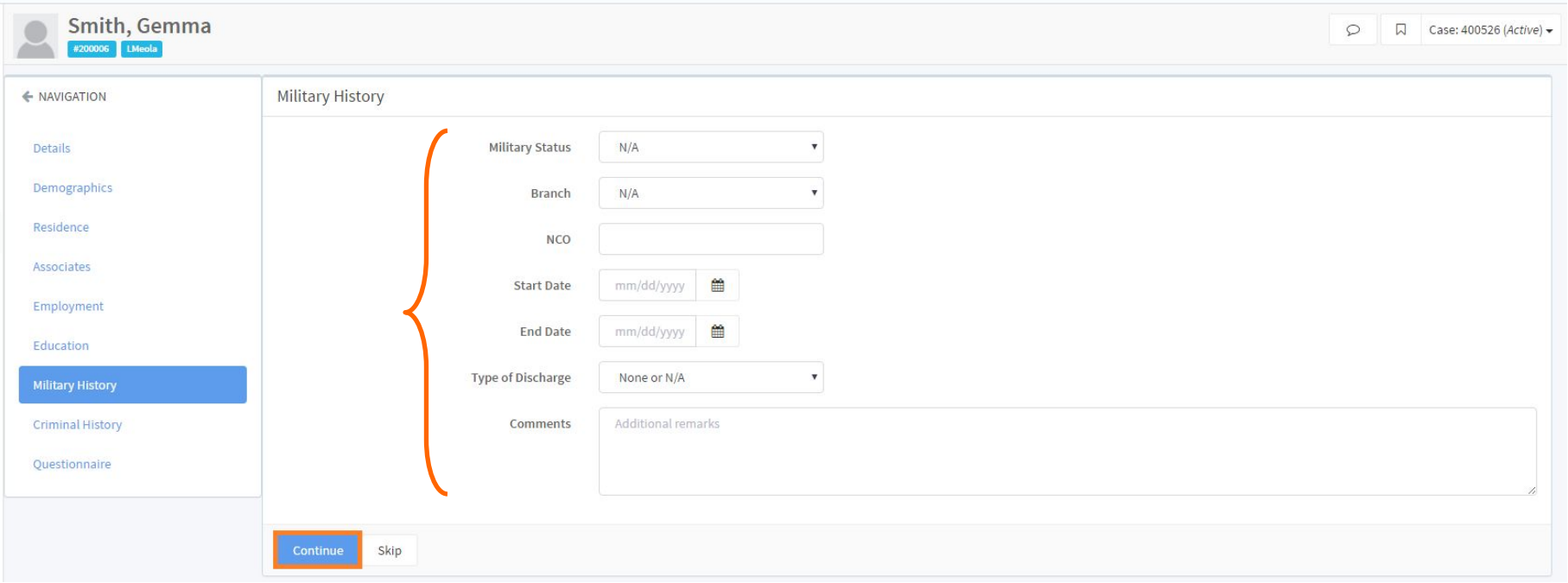
Investigation - Interview Cont'd

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.



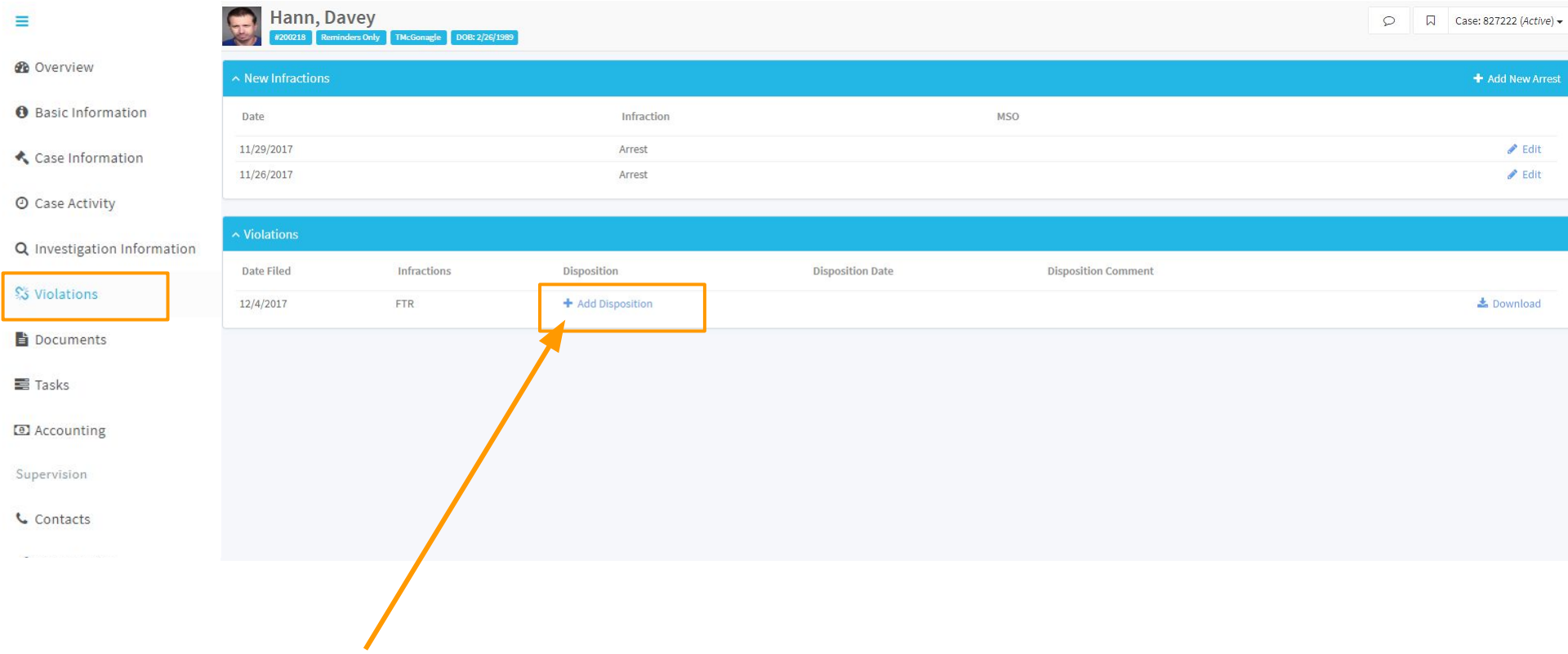
Investigation - Interview Cont'd

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.



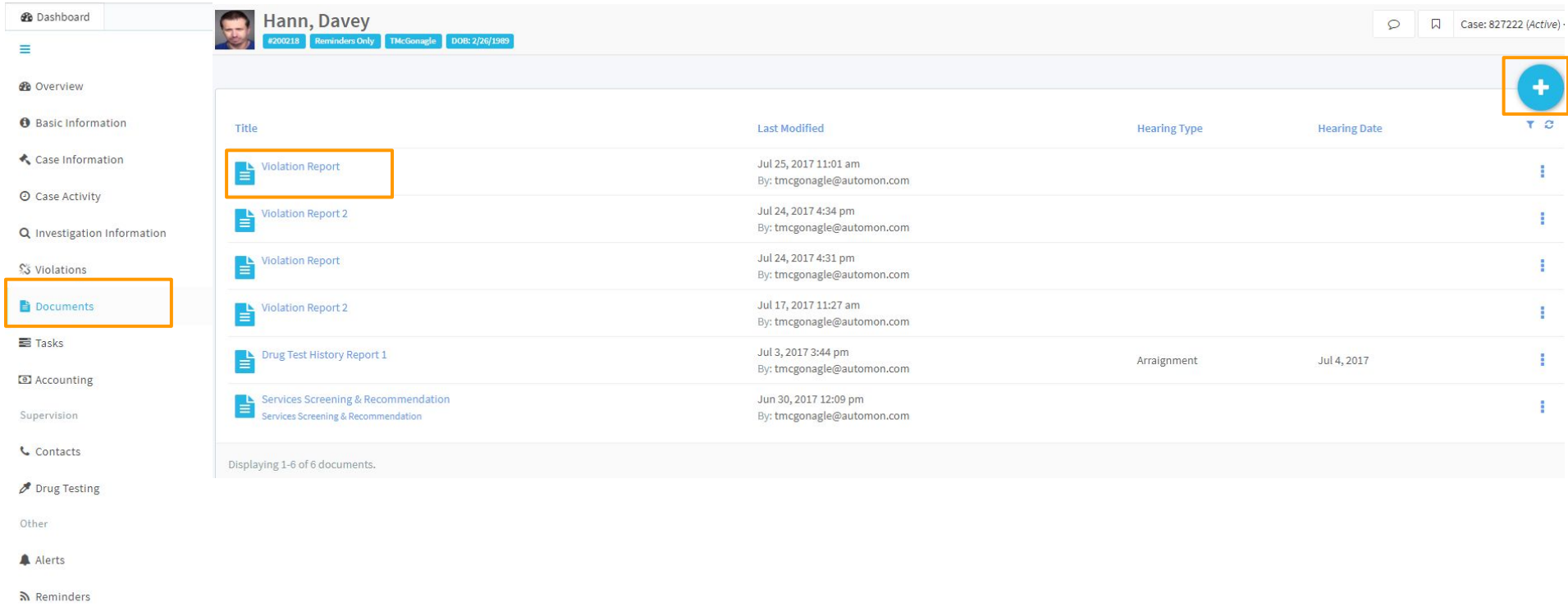
Violations

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.



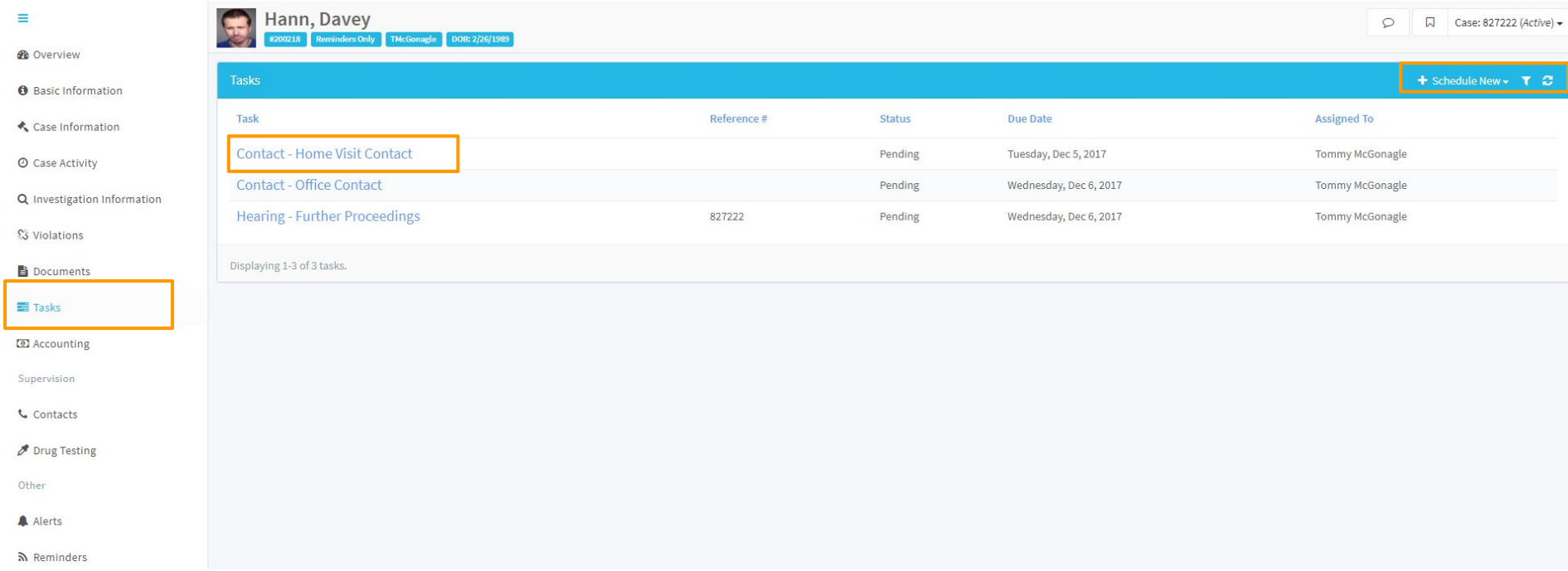
Documents

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.



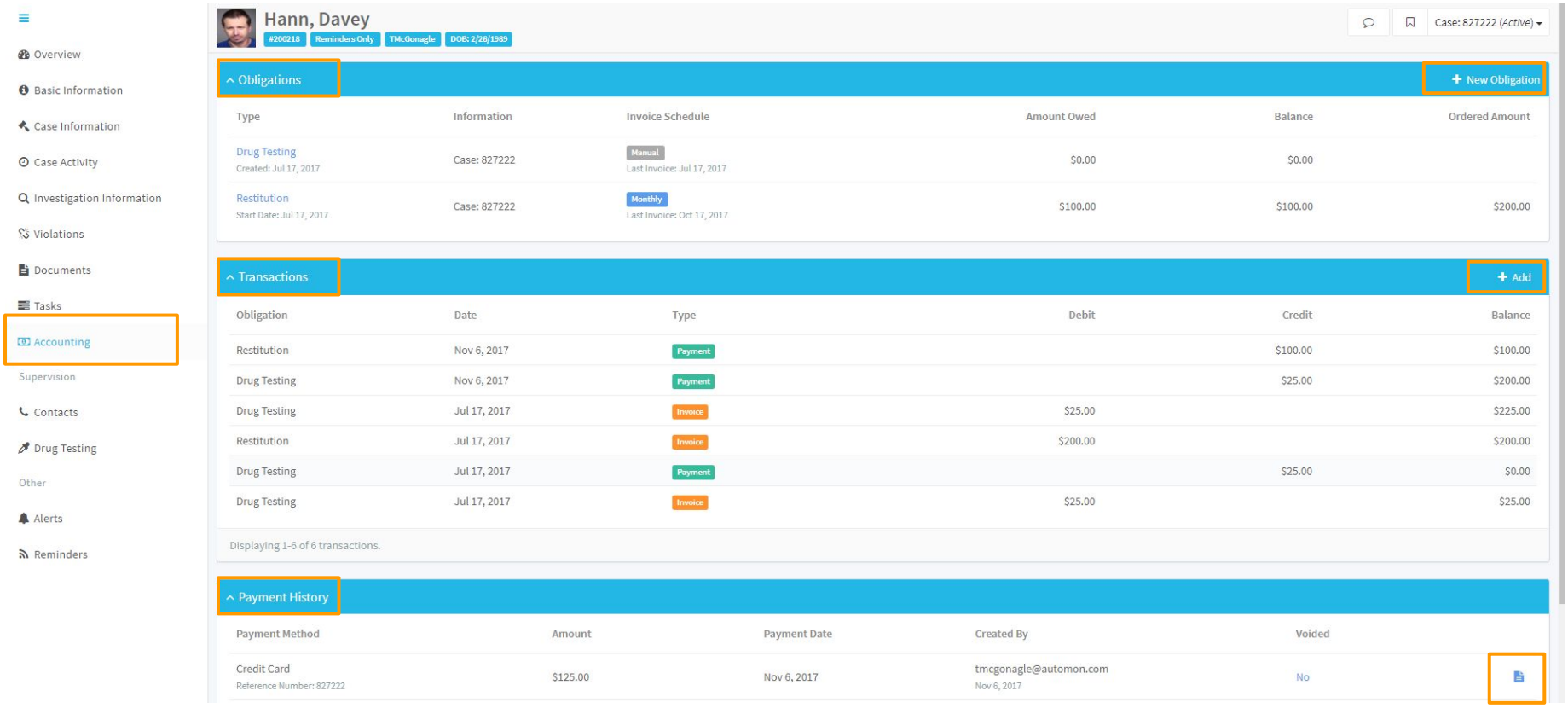
Tasks

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.



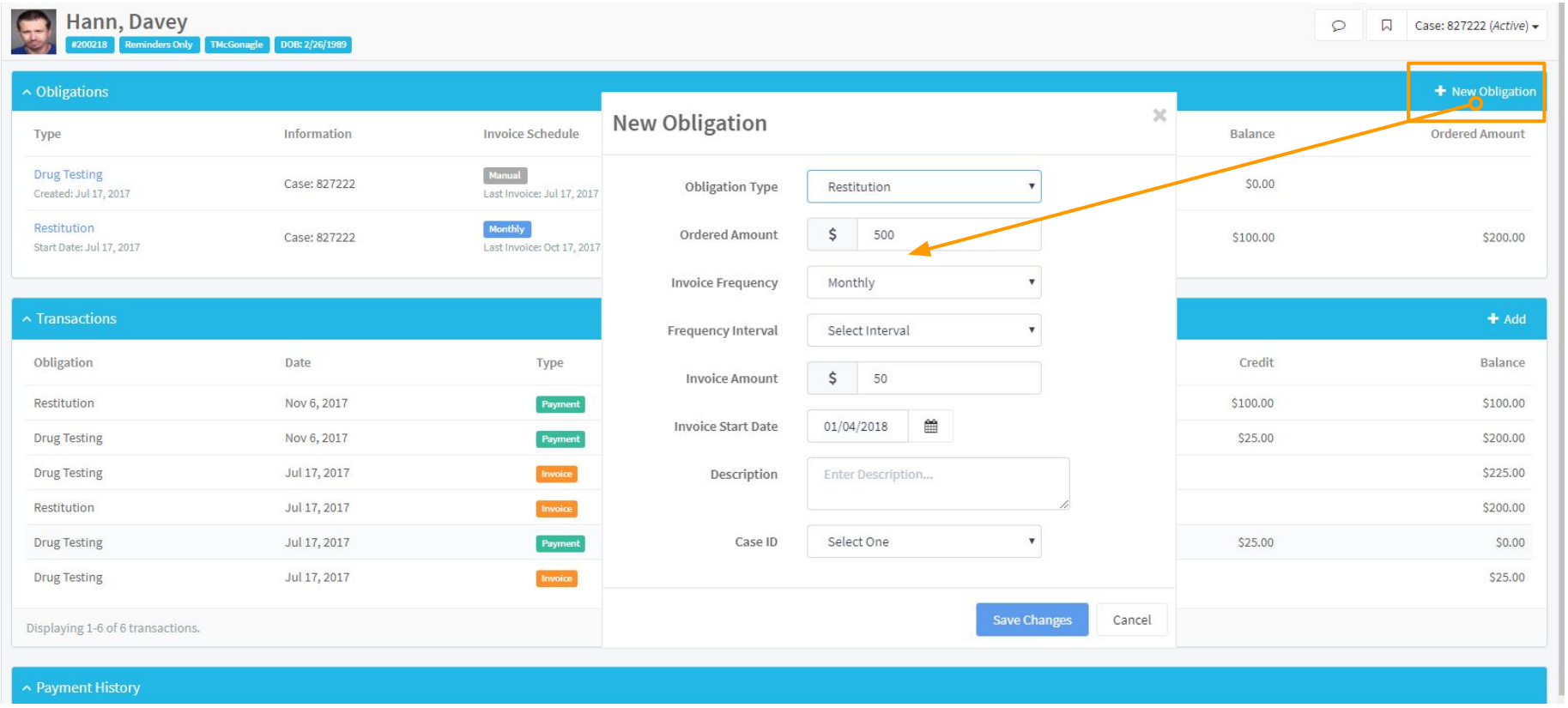
Accounting

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.



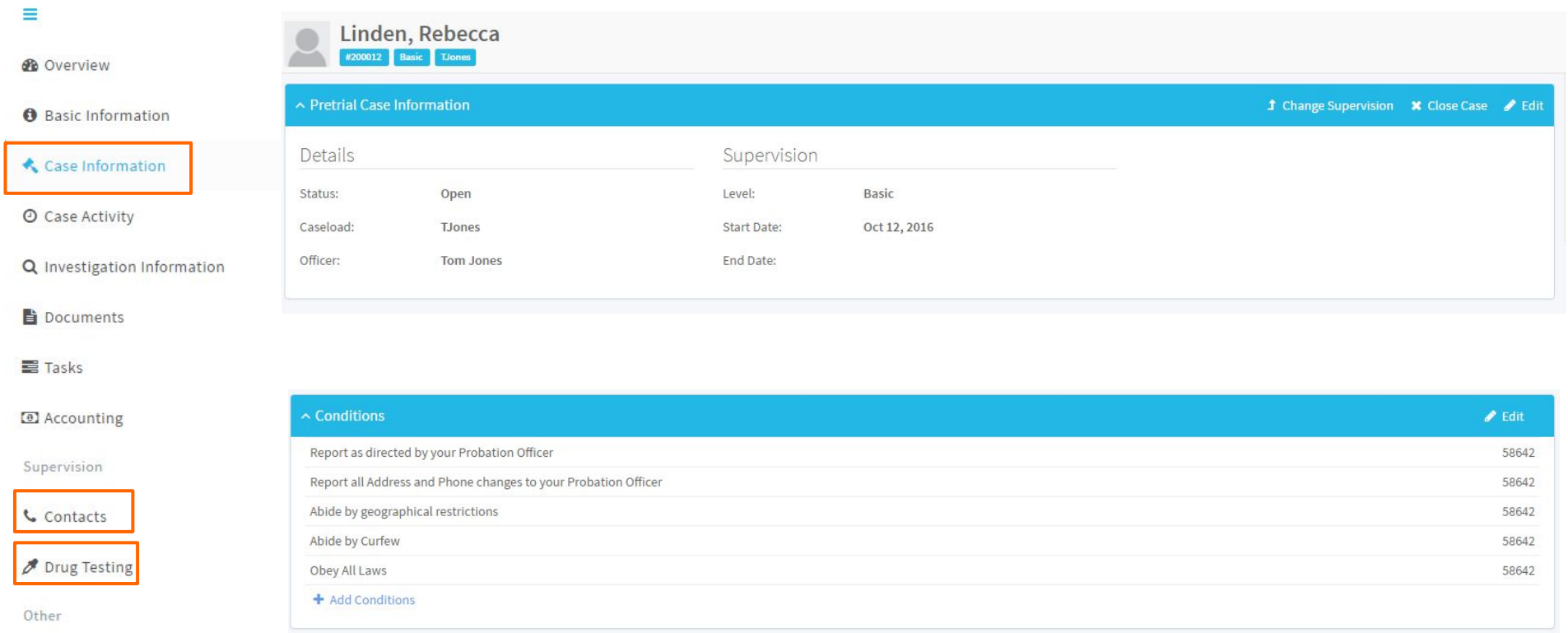
Accounting Cont'd - New Obligations

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.



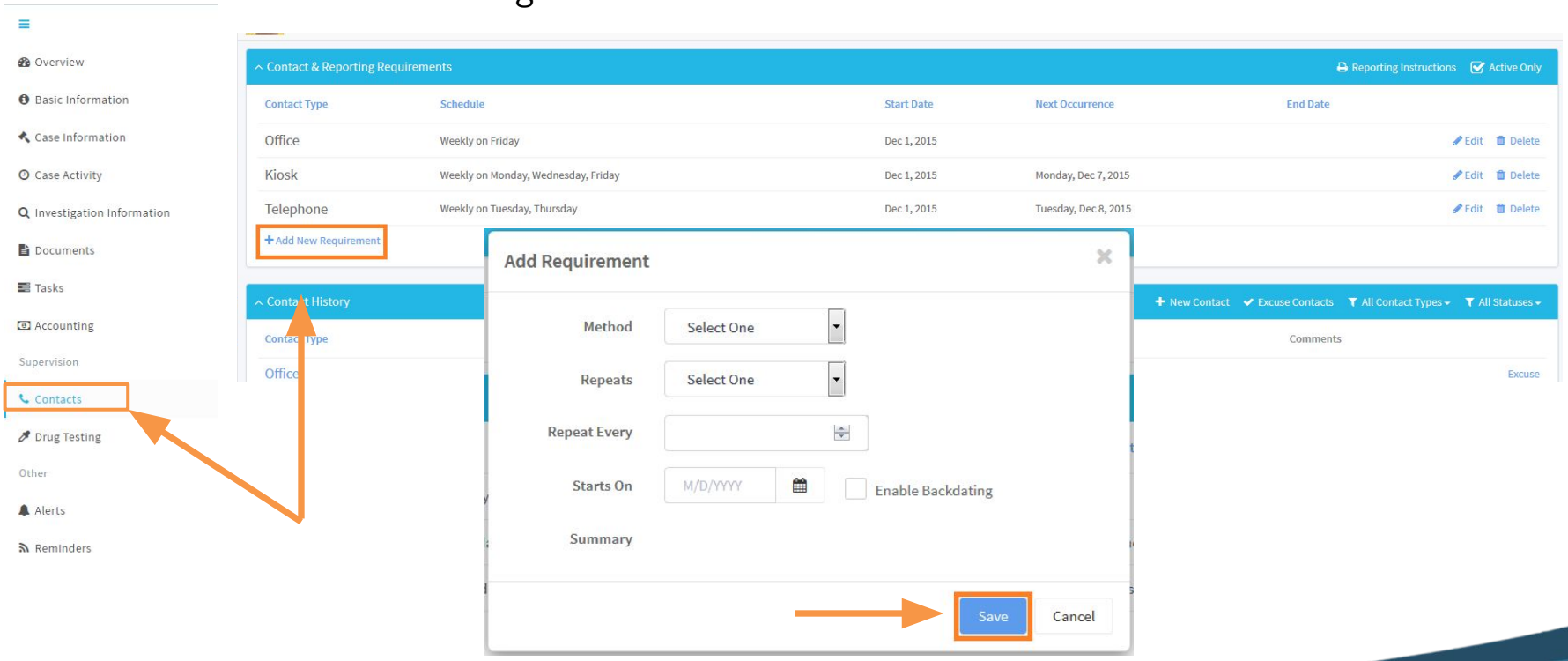
Supervision - Overview

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.



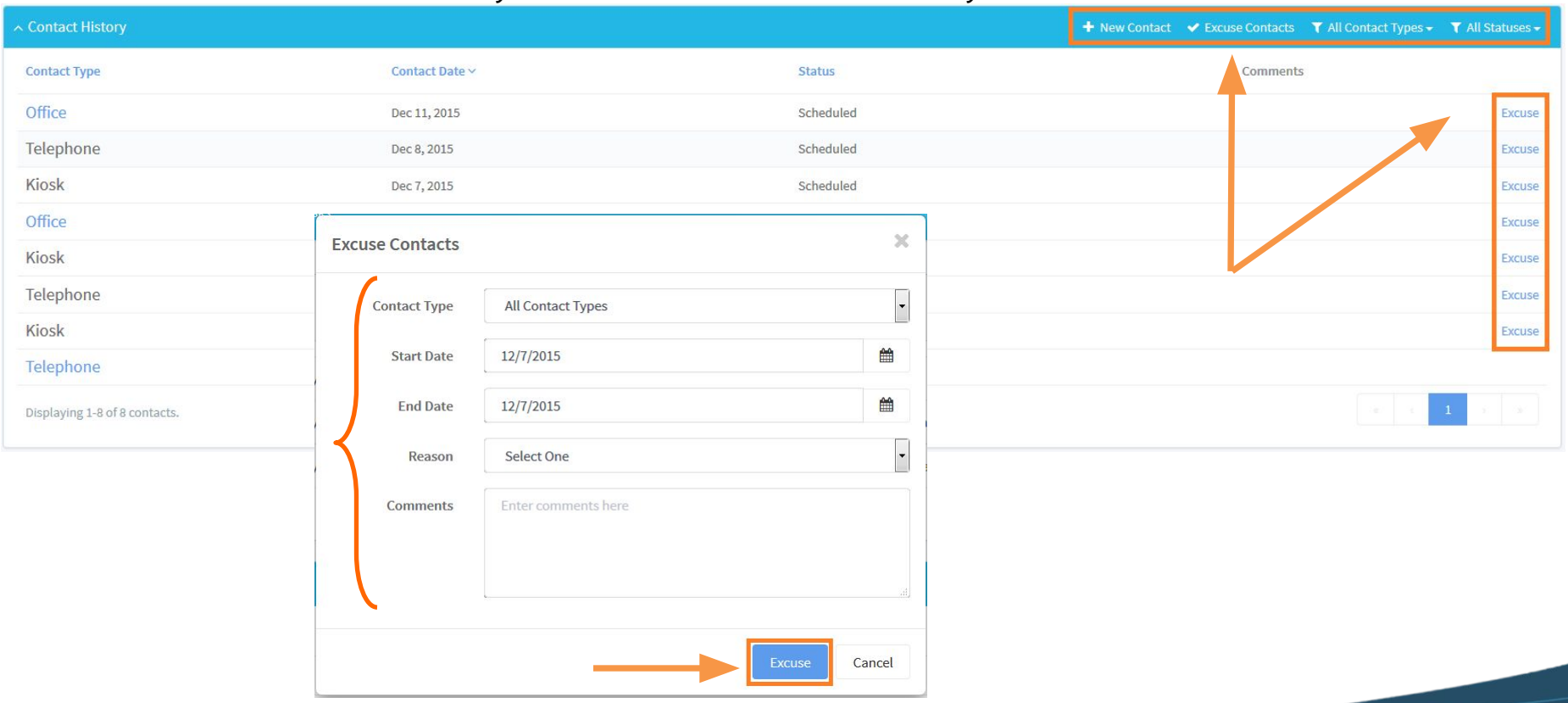
Supervision – Contacts and Reporting Requirements

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.



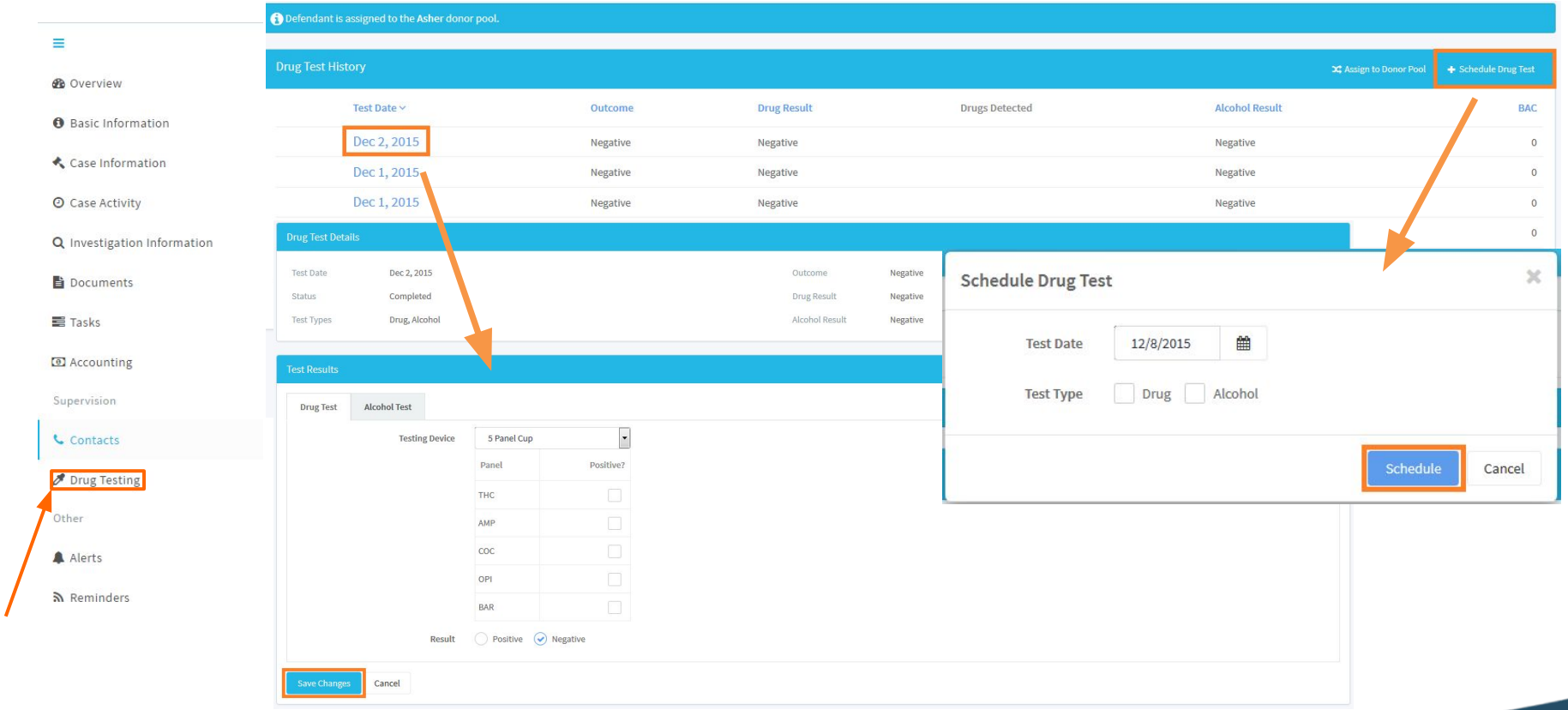
Supervision – Contacts - Continued

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.



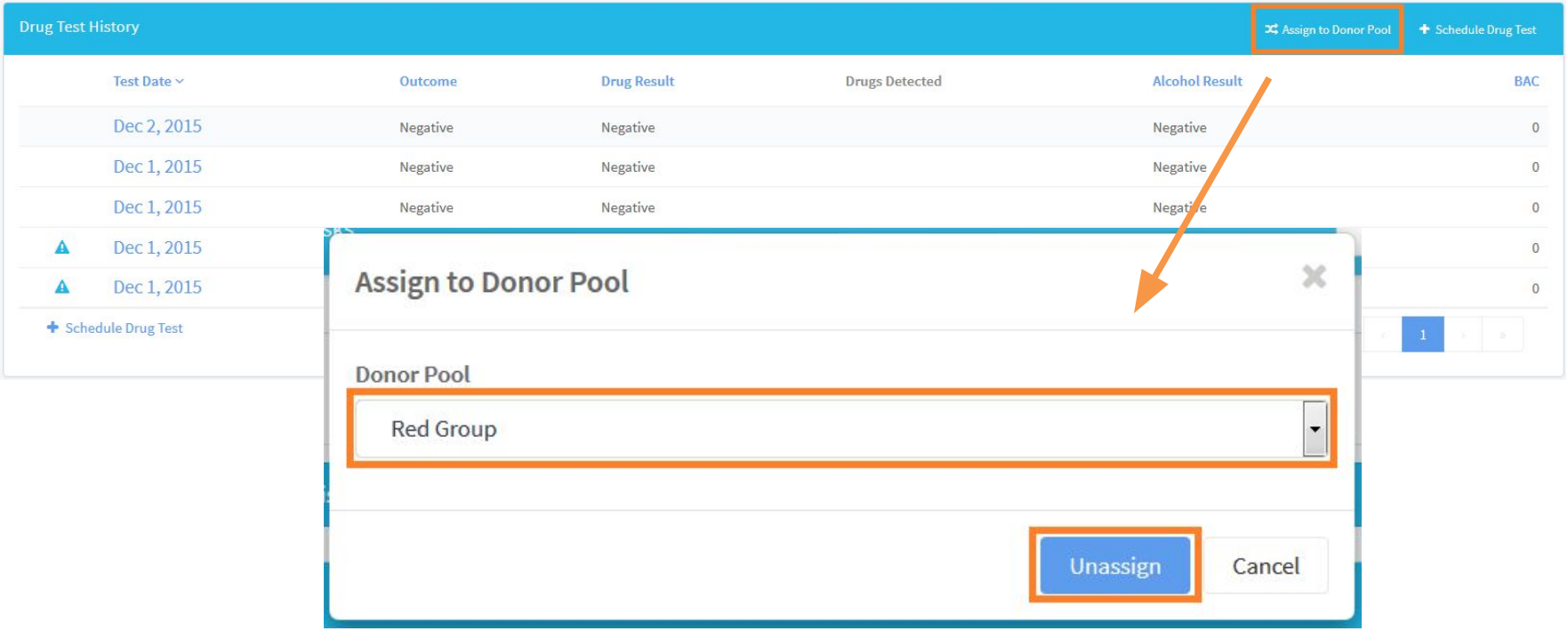
Supervision – Drug Testing – Scheduling and Managing Drug Tests

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.



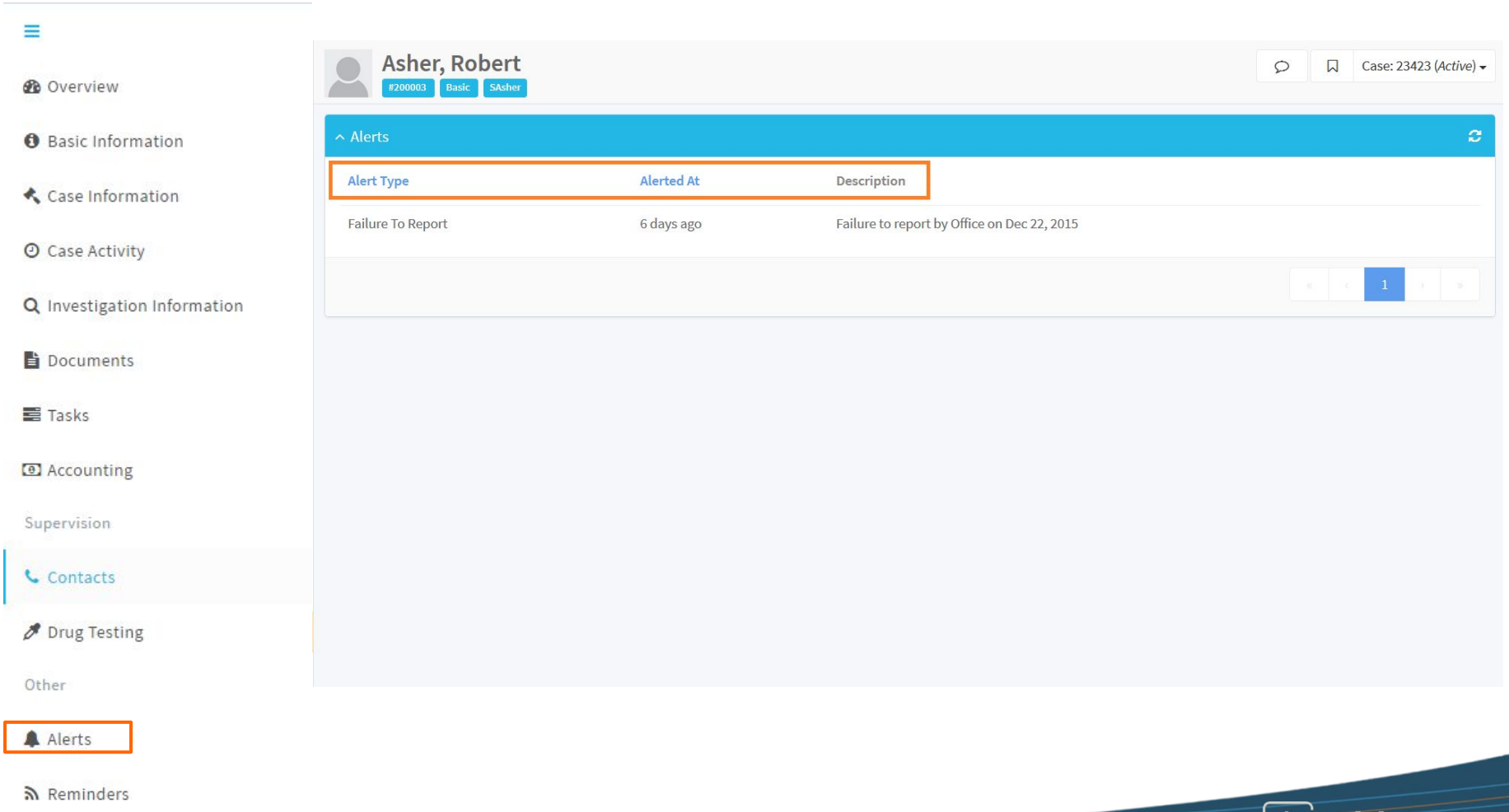
Supervision – Drug Testing – Assigning A Defendant to a Donor Pool

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.



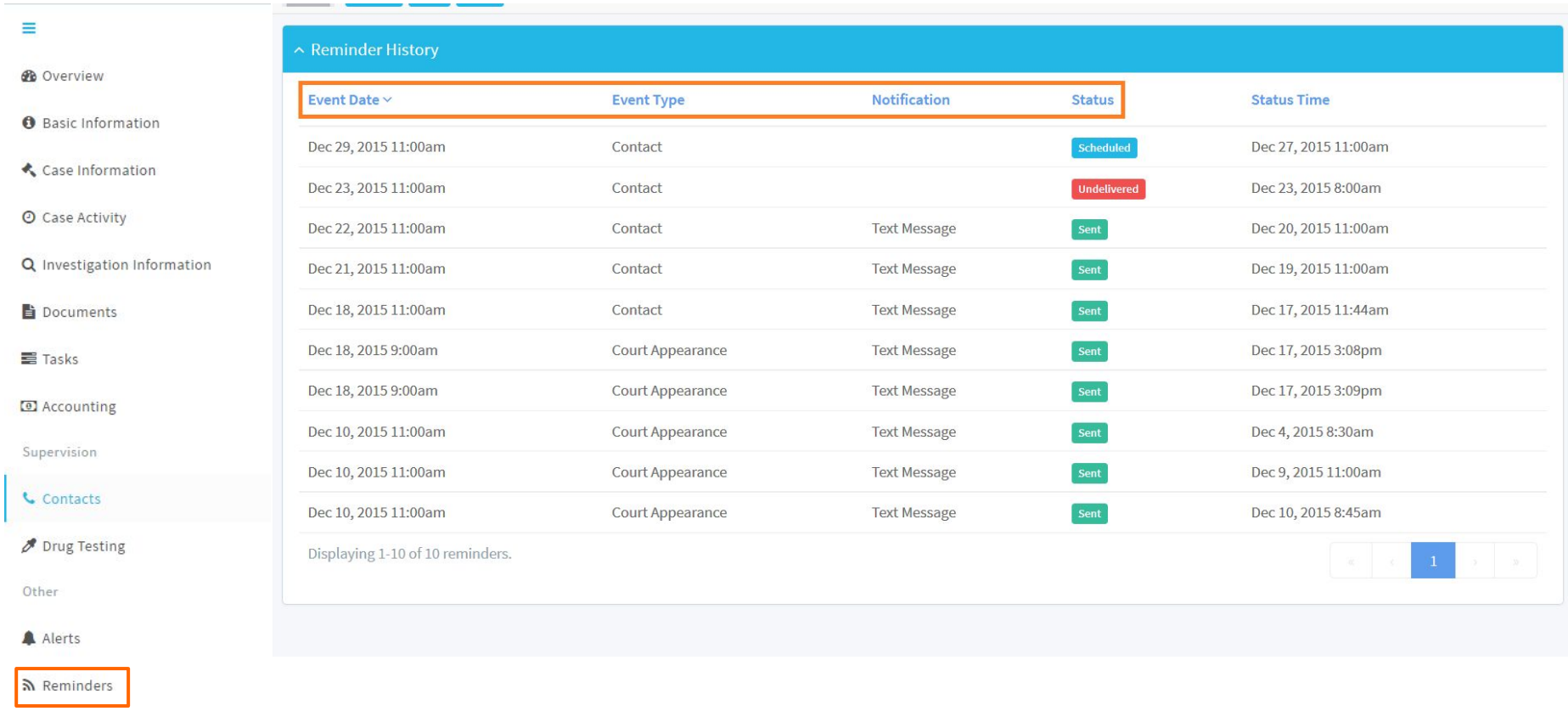
Defendant Alerts

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.



Reminders

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.



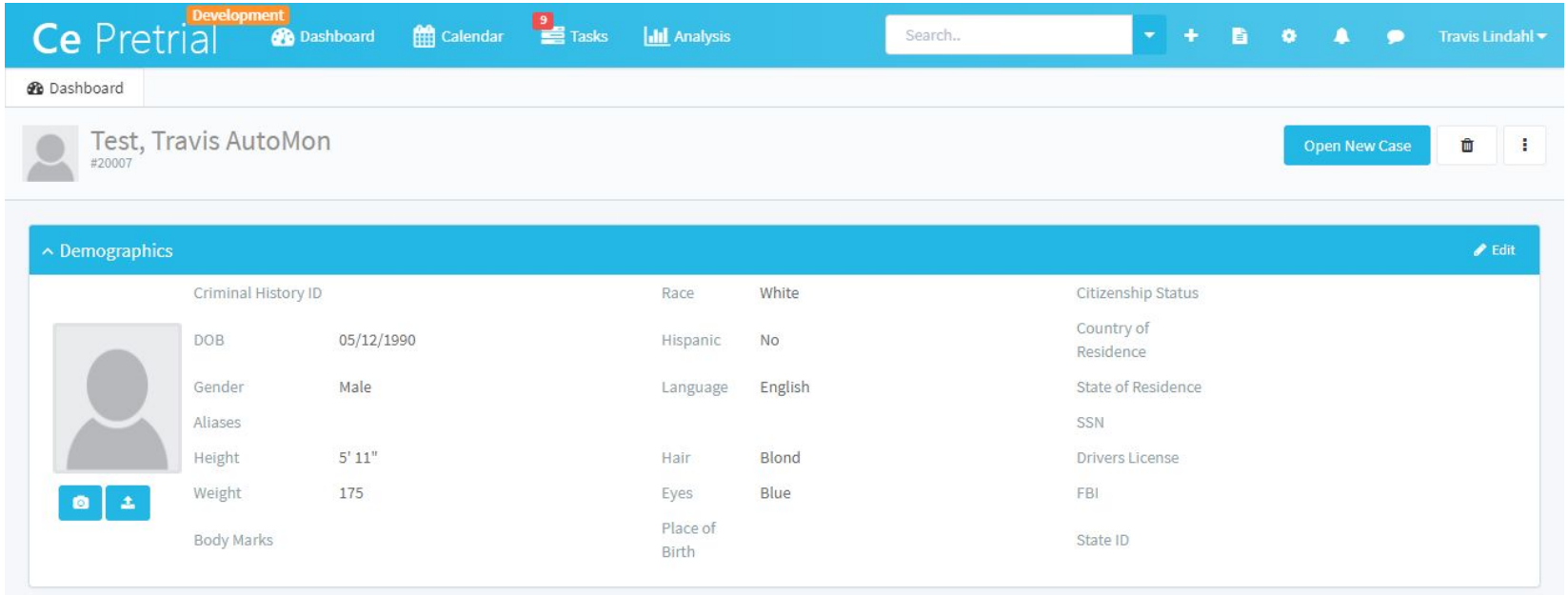
Topic 11: Merging Defendants

Subtopics:

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

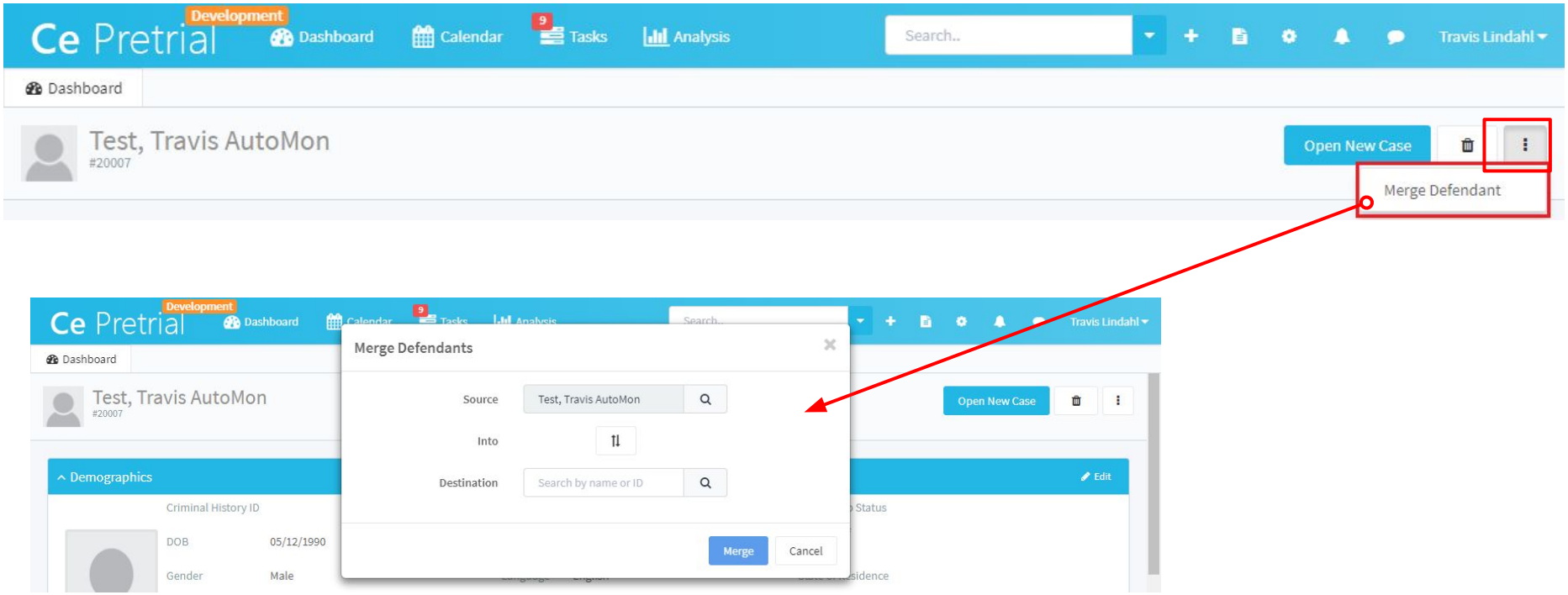
Merging Defendants Overview

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.



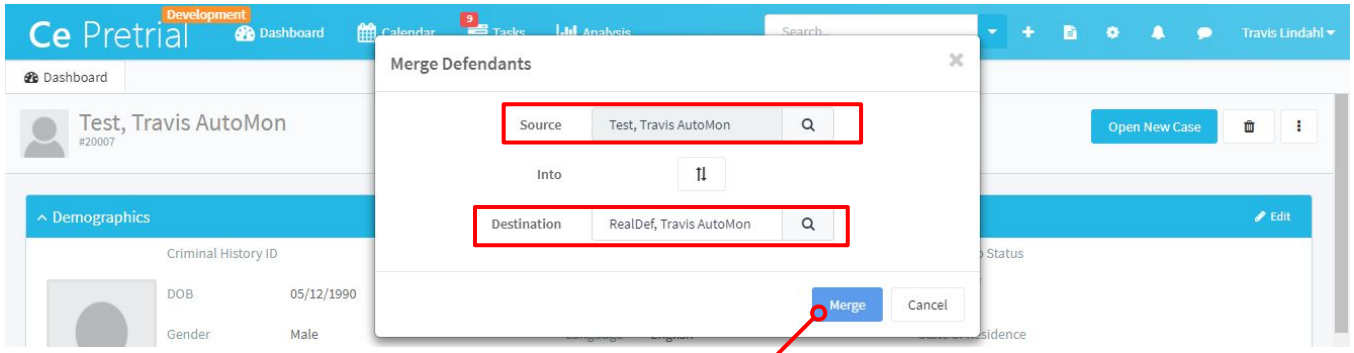
Merging Defendants

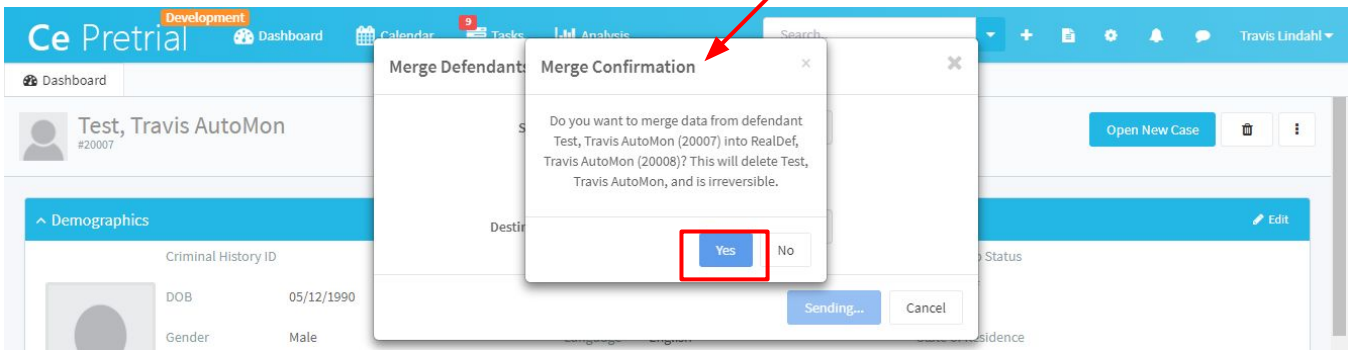
Without a Pretrial Case, we are taken directly to the defendant overview rather than a Pretrial Case overview. As an administrator, click the ellipsis icon in the top right corner of the overview. Then Users should select “Merge Defendant” from the drop-down opening the Merge Defendants dialog.



Merging Defendants Continued

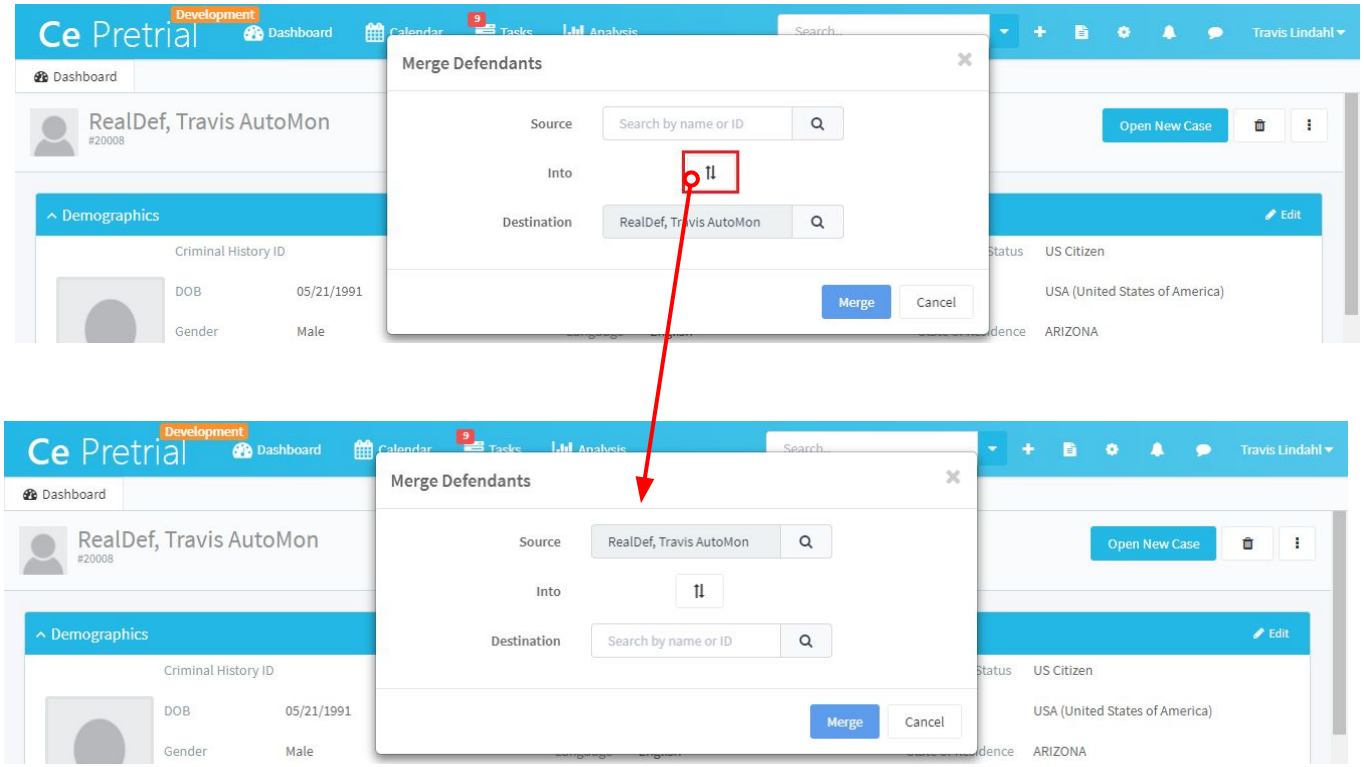
Users should fill out the source and destination sections and then click “Merge”. Users will be prompted to confirm their Merge. Once Users select “Yes” the Merge will be completed and the Users will be directed to the destination defendants overview and the source defendant’s profile will have been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



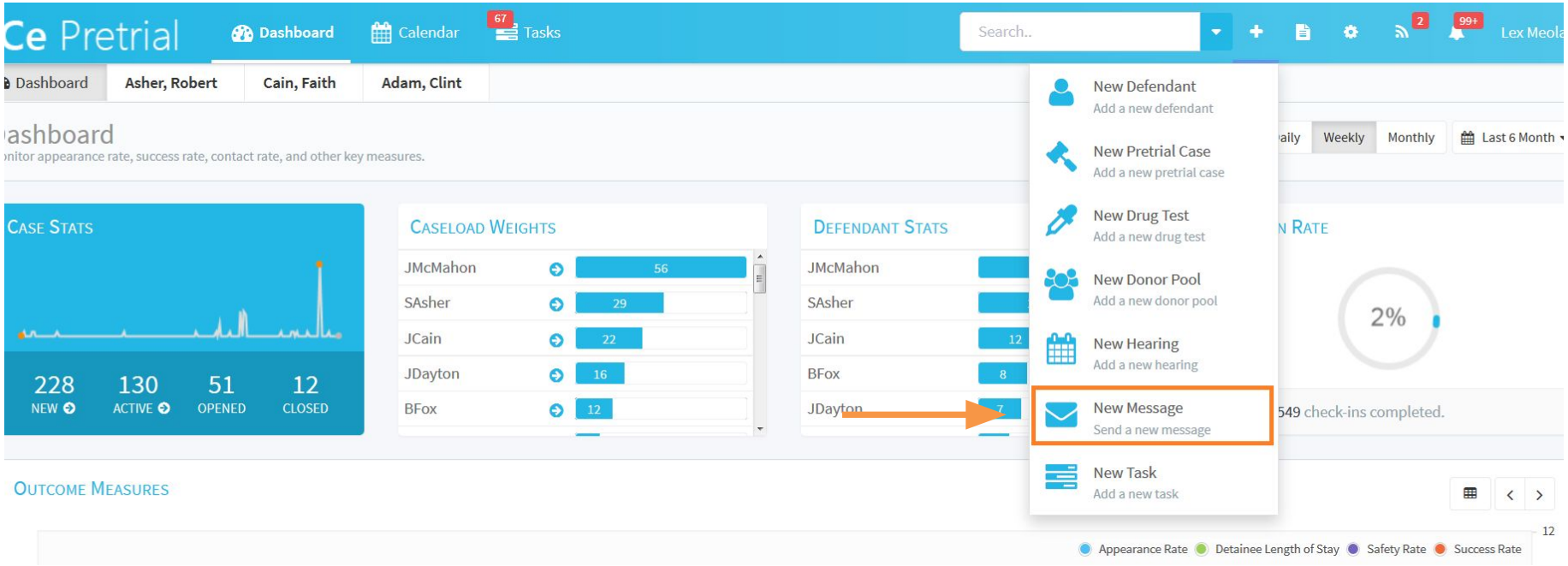
Topic 12: Send a New Message

Subtopics:

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

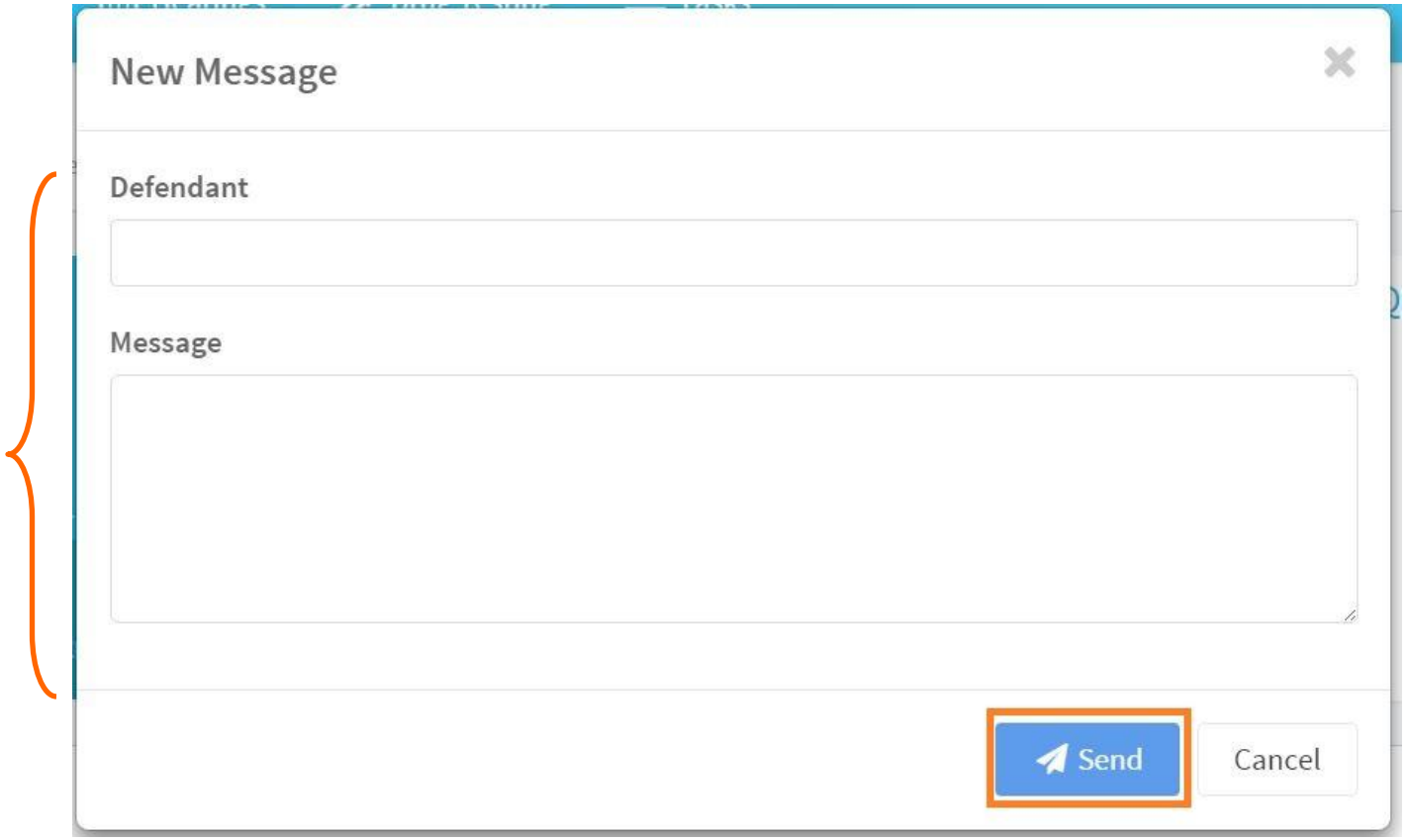
Navigate to New Message

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.*



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.*



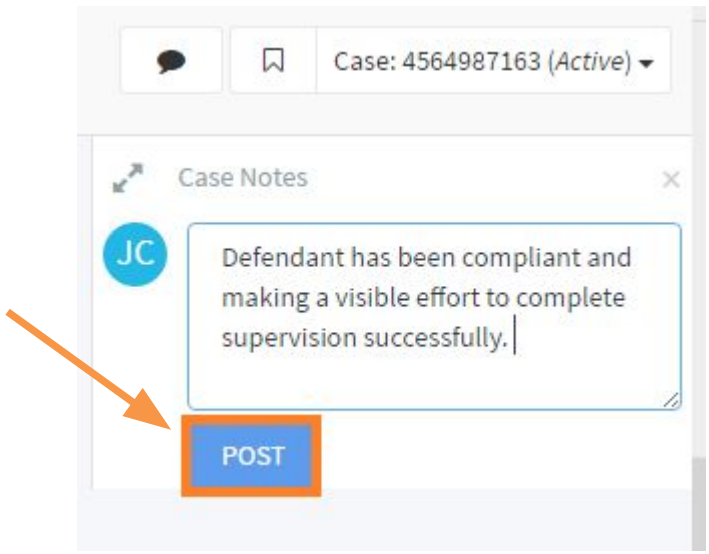
Topic 13: Case Notes and Bookmarking Defendants

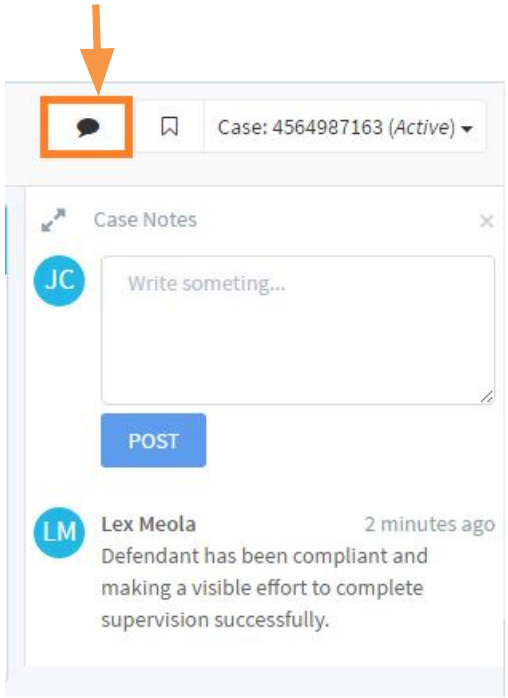
Subtopics:

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.

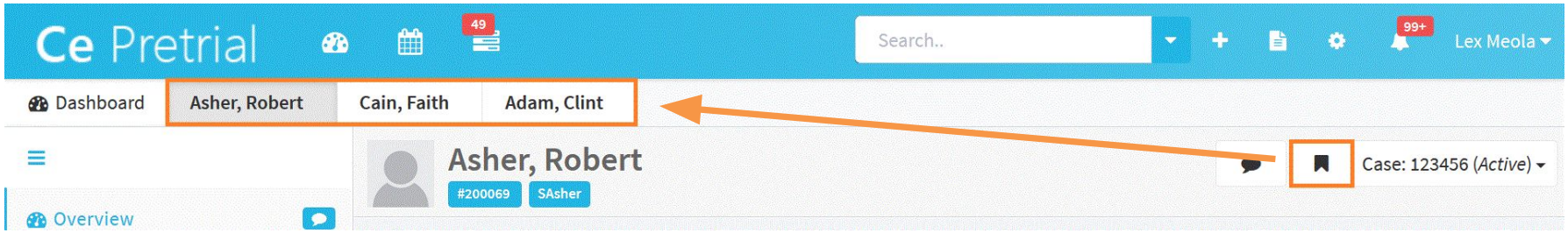




Note: The purpose of this feature is NOT to note office/telephone contacts, or to report on scheduled contacts– metrics will not reflect on this feature.

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.



Topic 14: Search

Subtopics:

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

Navigating to The Search Bar

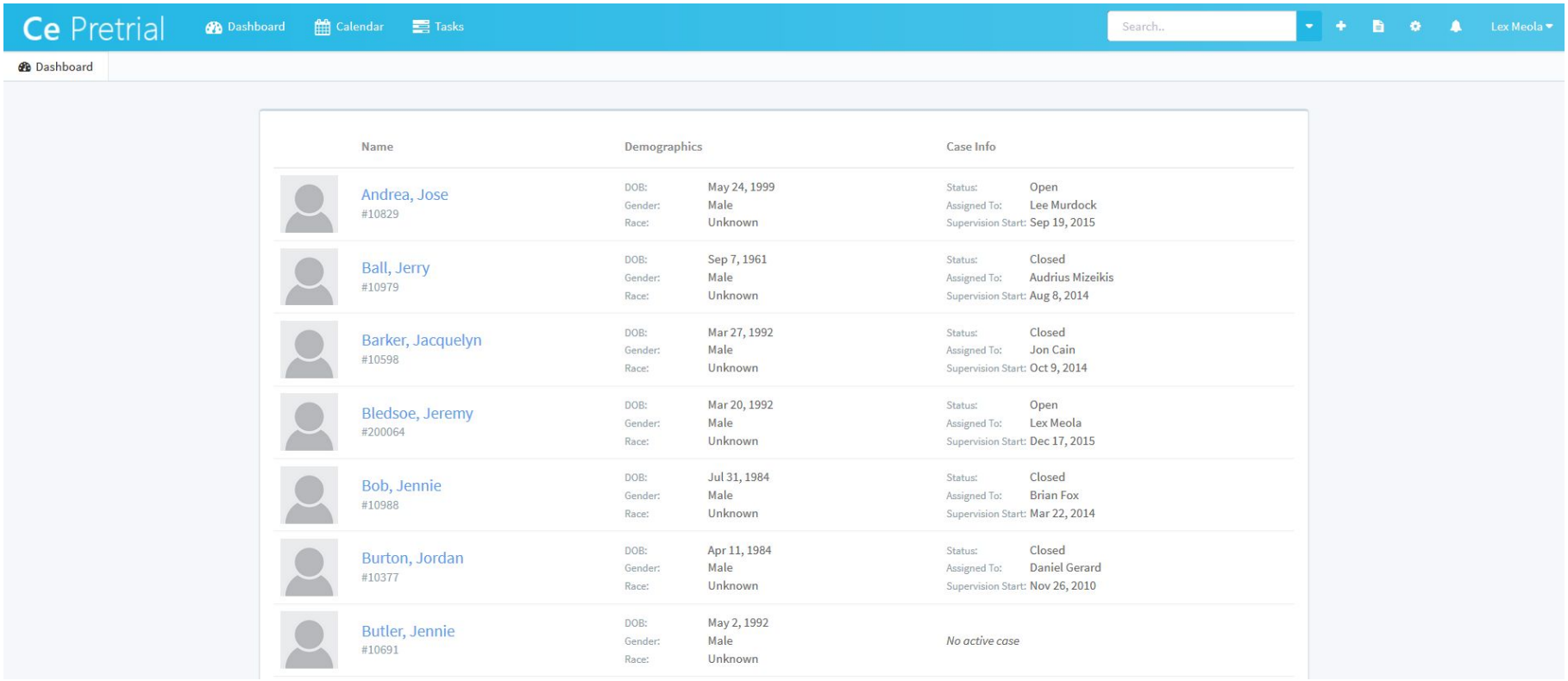
To search the application, the user should click on the search at the top right of the dashboard. Enter a defendant's name or pin # to perform a search. The search bar is a static component of the application – meaning it will always be available for the user to perform a search regardless of the tab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

View Search Results

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



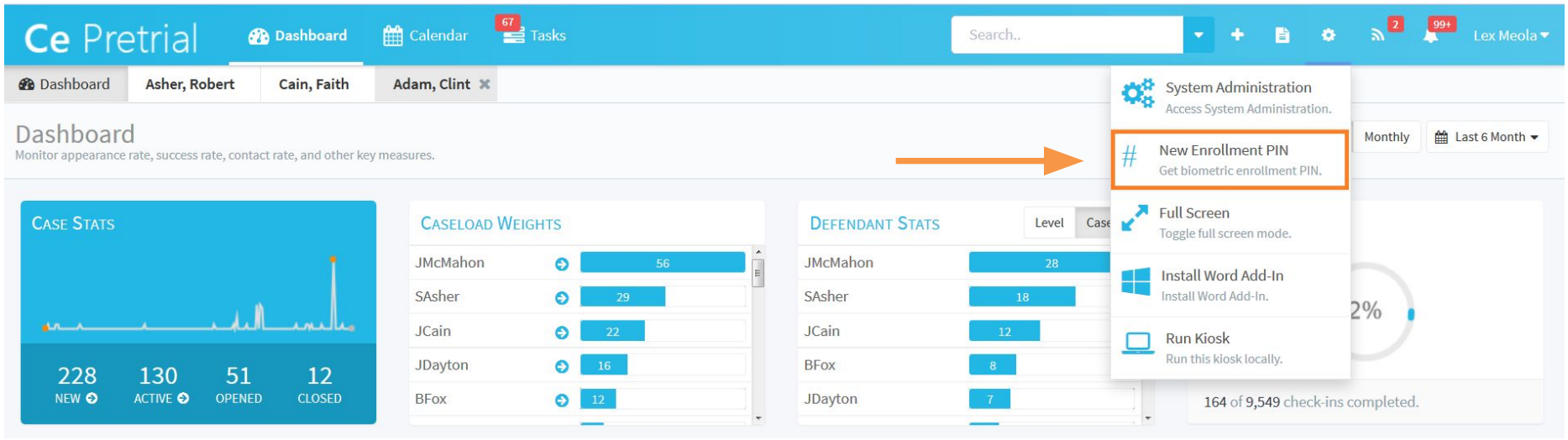
Topic 15: New Enrollment PIN

Subtopics:

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

Navigate to New Enrollment PIN

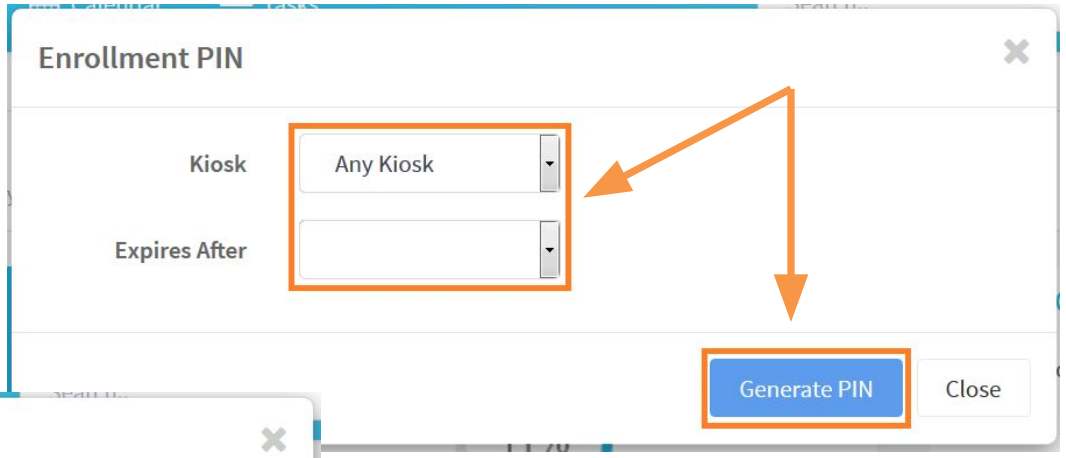
To generate a New Enrollment PIN for kiosk check-ins, the user will need to navigate to New Enrollment Pin. To do this, click on the Gear Menu Icon and select New Enrollment PIN.

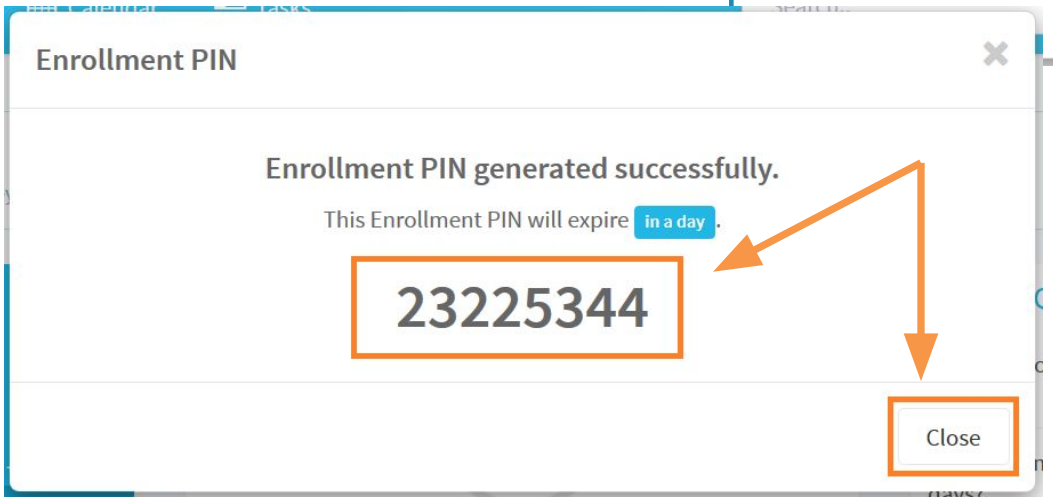


TIP An enrollment PIN is the number that the defendant will enter into the kiosk at the time of their check-in. This number puts the kiosk in the mode to check when the enrollment PIN expires.

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.





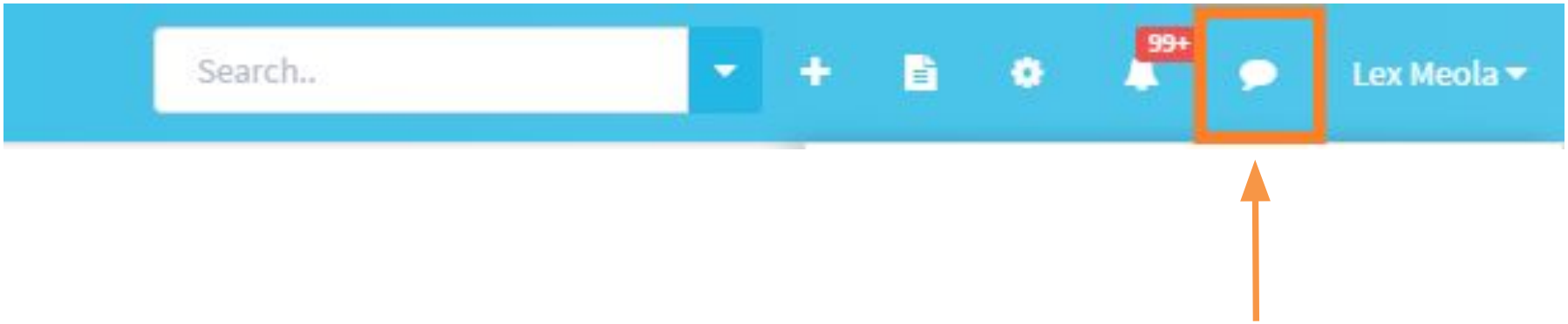
Topic 16: SMS Chat Feature

Subtopics:

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

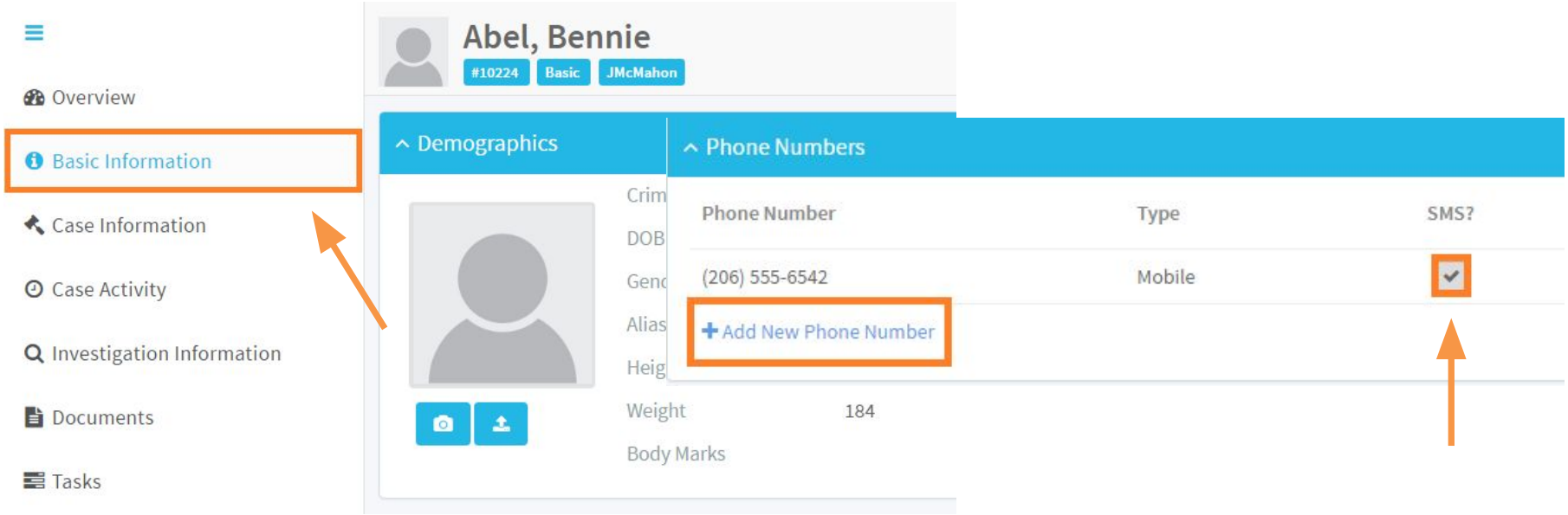
Navigation to SMS Chat Feature

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



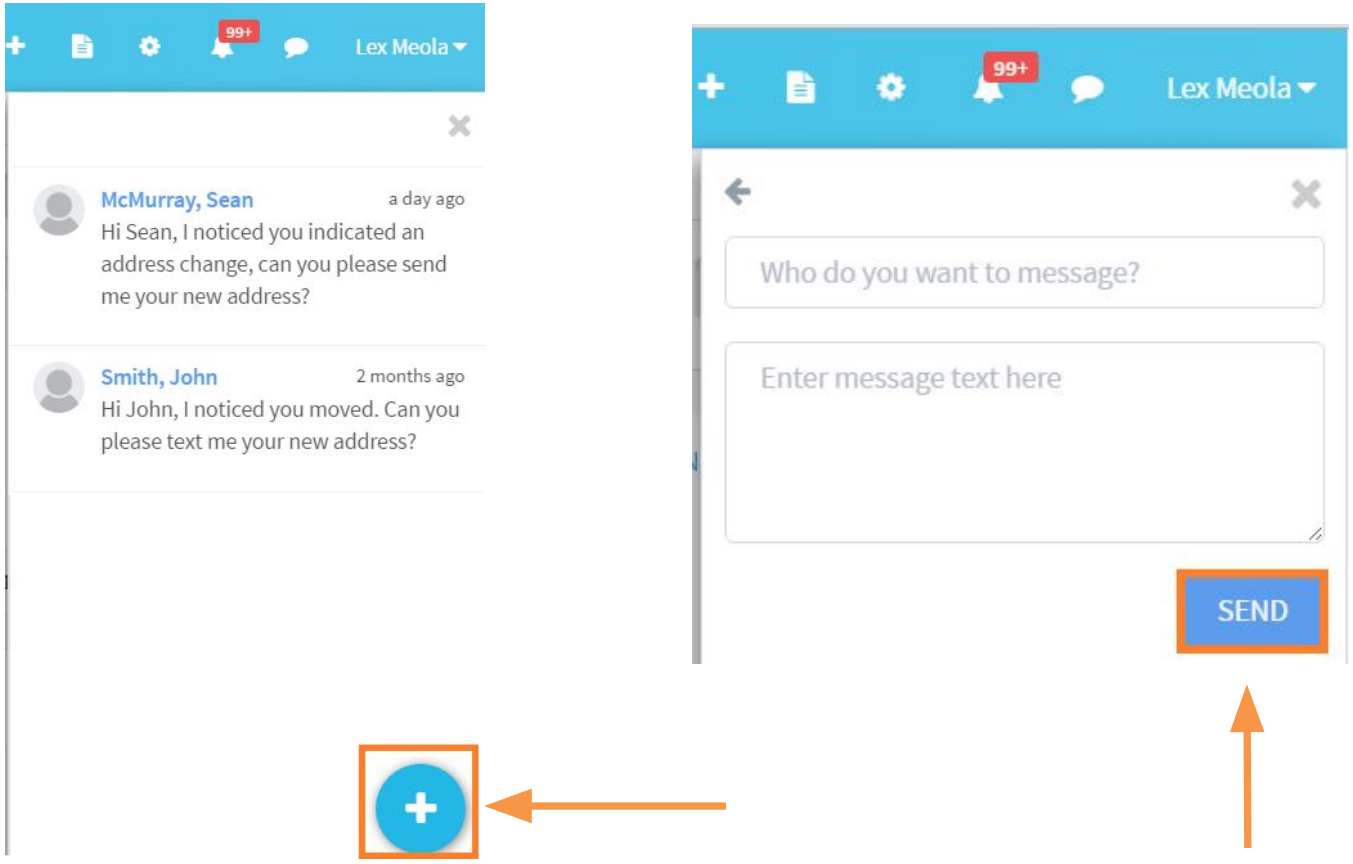
Setting up defendant for SMS reminders

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.



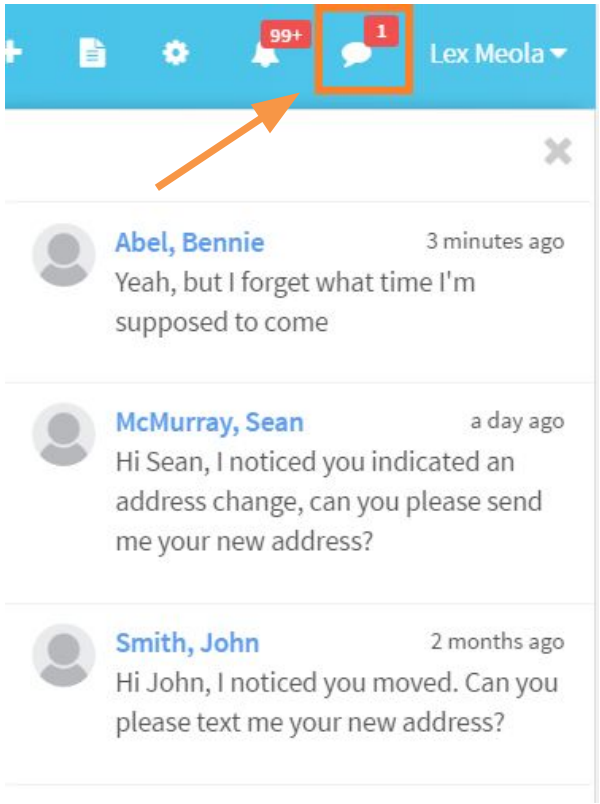
Sending a message and exposing responses

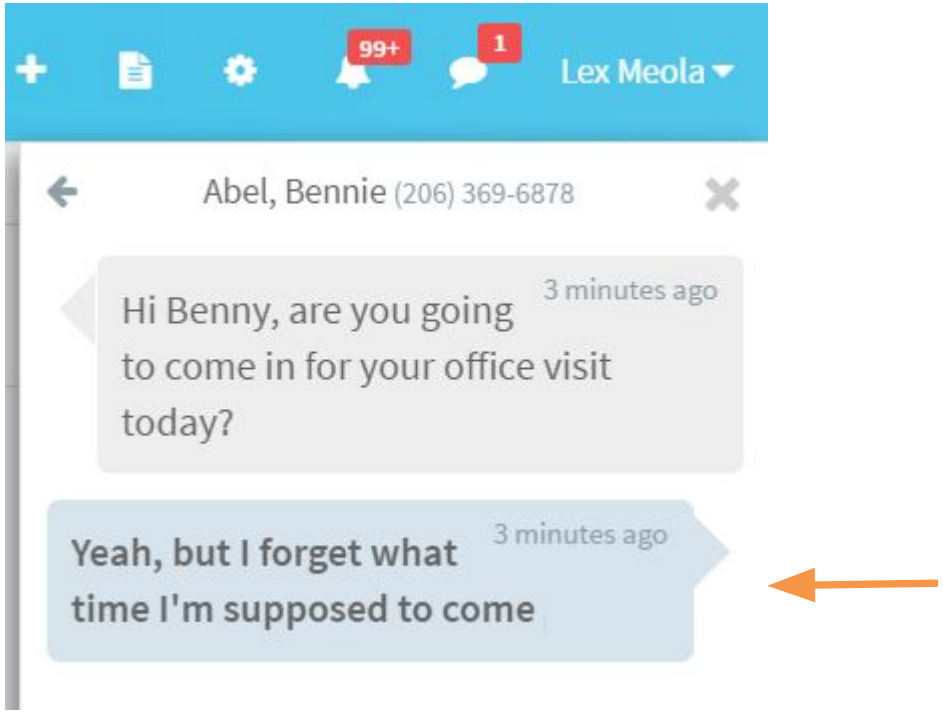
To access the SMS Chat Feature, click on the SMS Chat icon located on the top right of navigation taskbar. To send a SMS Message, click on the plus icon on the bottom of the chat screen. Search for a Defendant by name, and type the desired message. Once finished, click Send.



Sending a message and exposing responses cont.

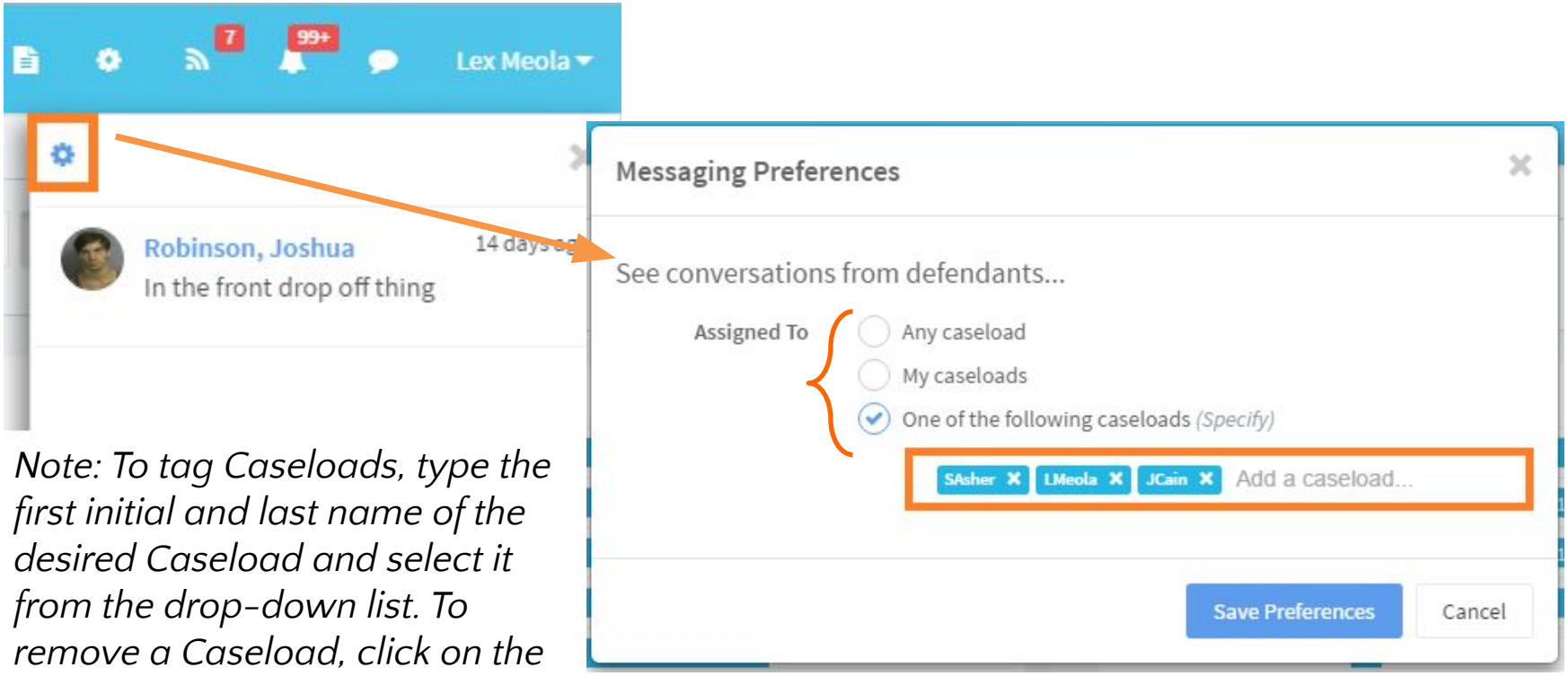
When a Defendant responds to an SMS message, the system will generate an alert on the SMS Chat icon. To expose the response, click on chat icon located in top right taskbar of screen. Click the name of the particular Defendant to expose their response to the SMS message.





SMS Messaging Preferences

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.

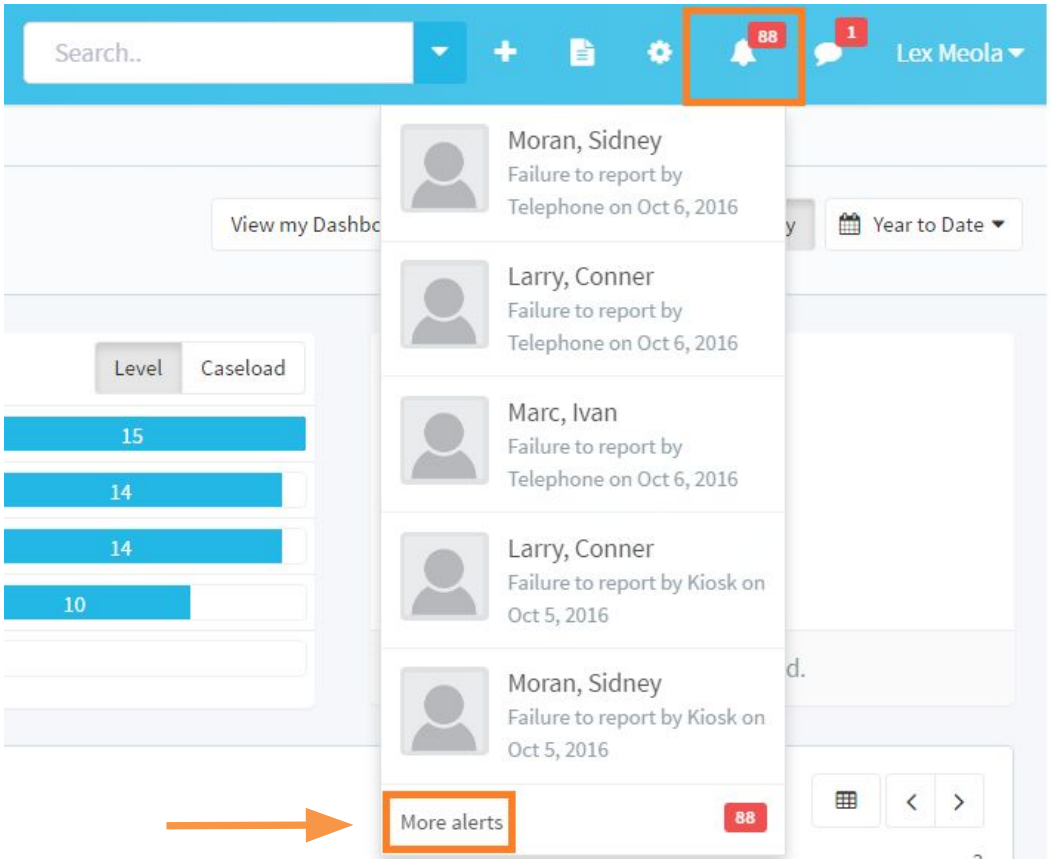
Topic 17: Filtering Alerts and Notification Preferences

Subtopics:

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

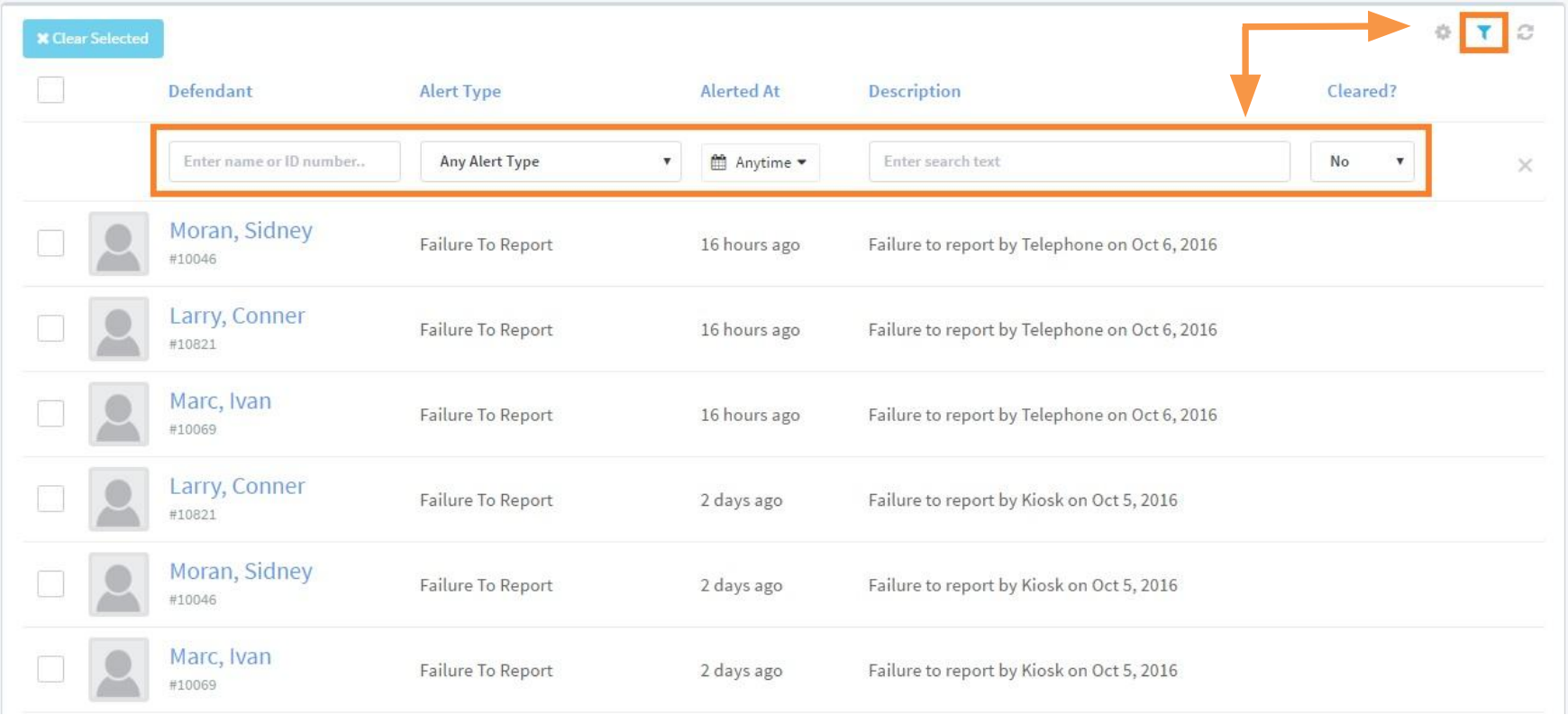
Accessing Filtering Alerts

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



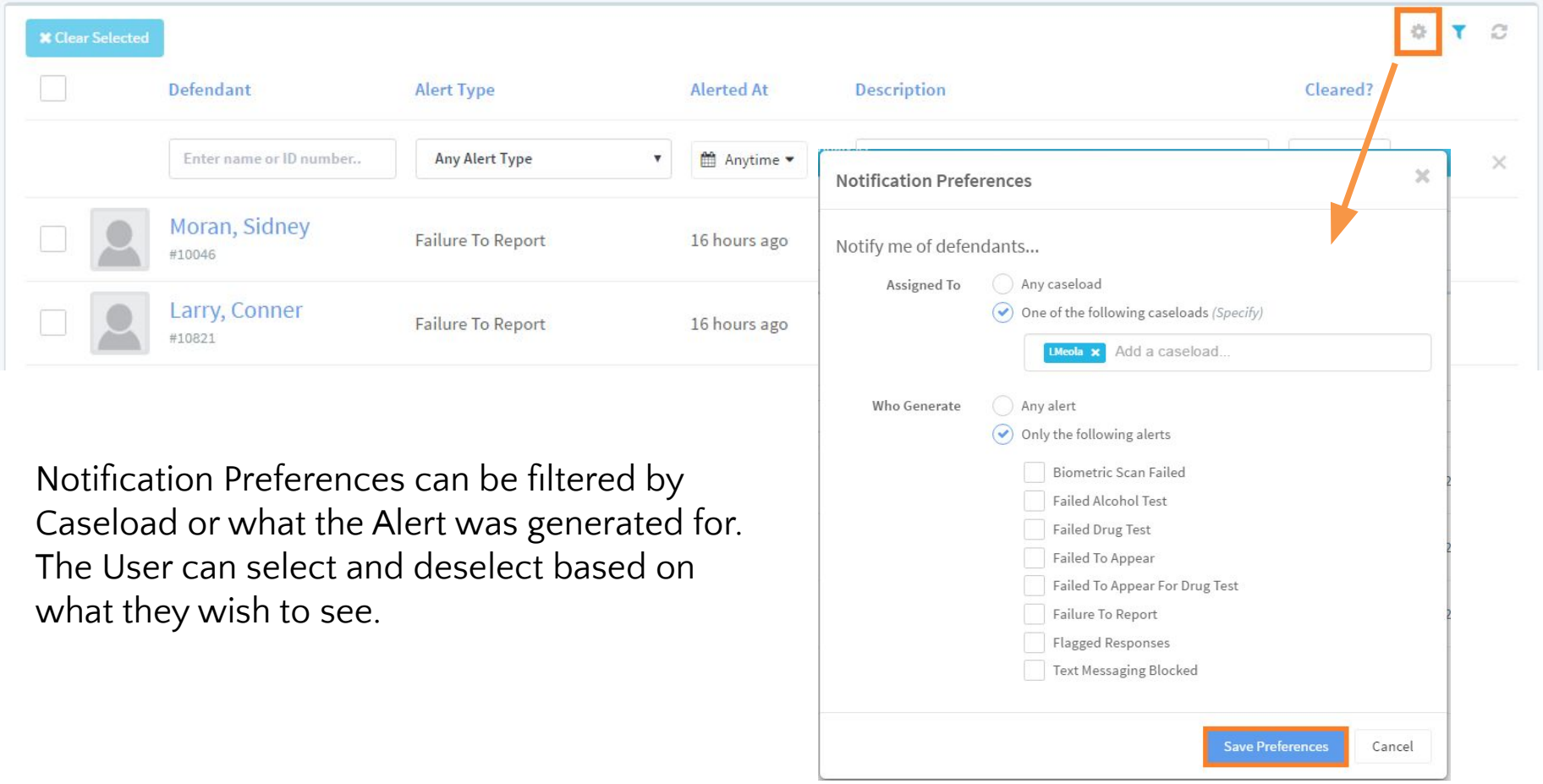
Filtering Alerts

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.



Notification Preferences

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



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.

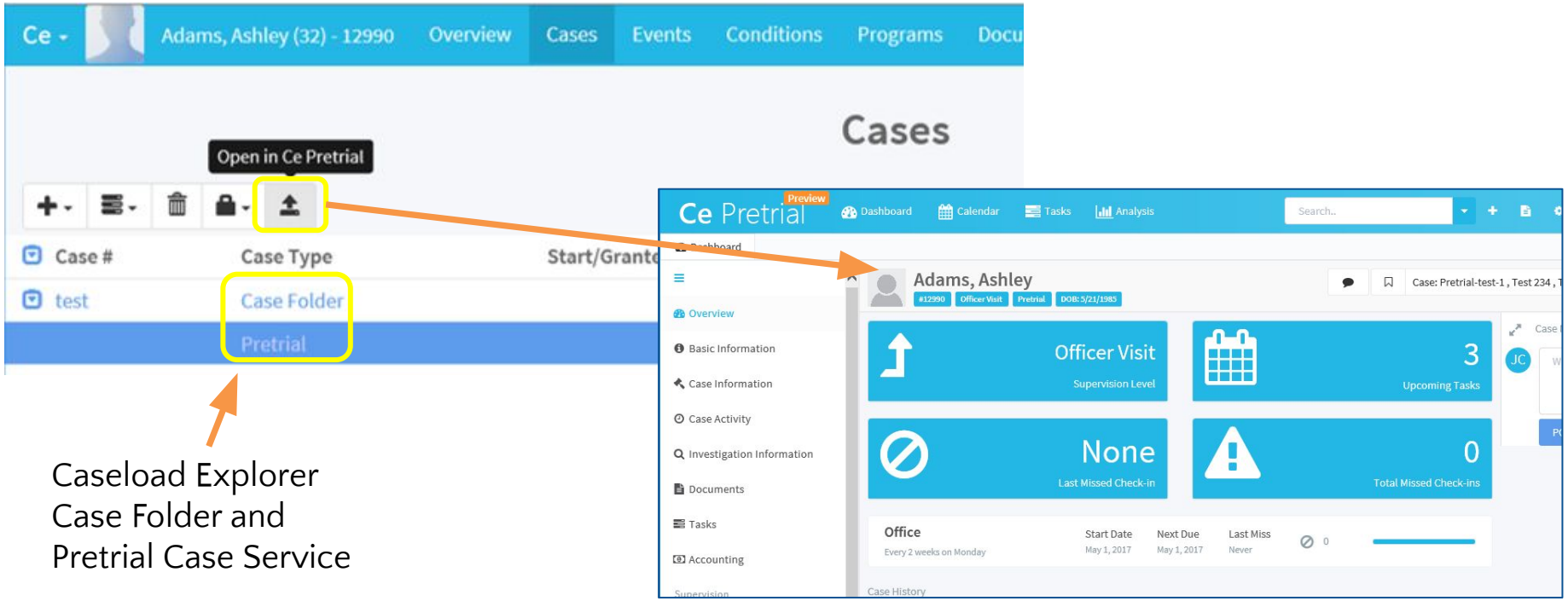
Topic 18: Caseload Explorer Integration

Subtopics:

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

Overview

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.

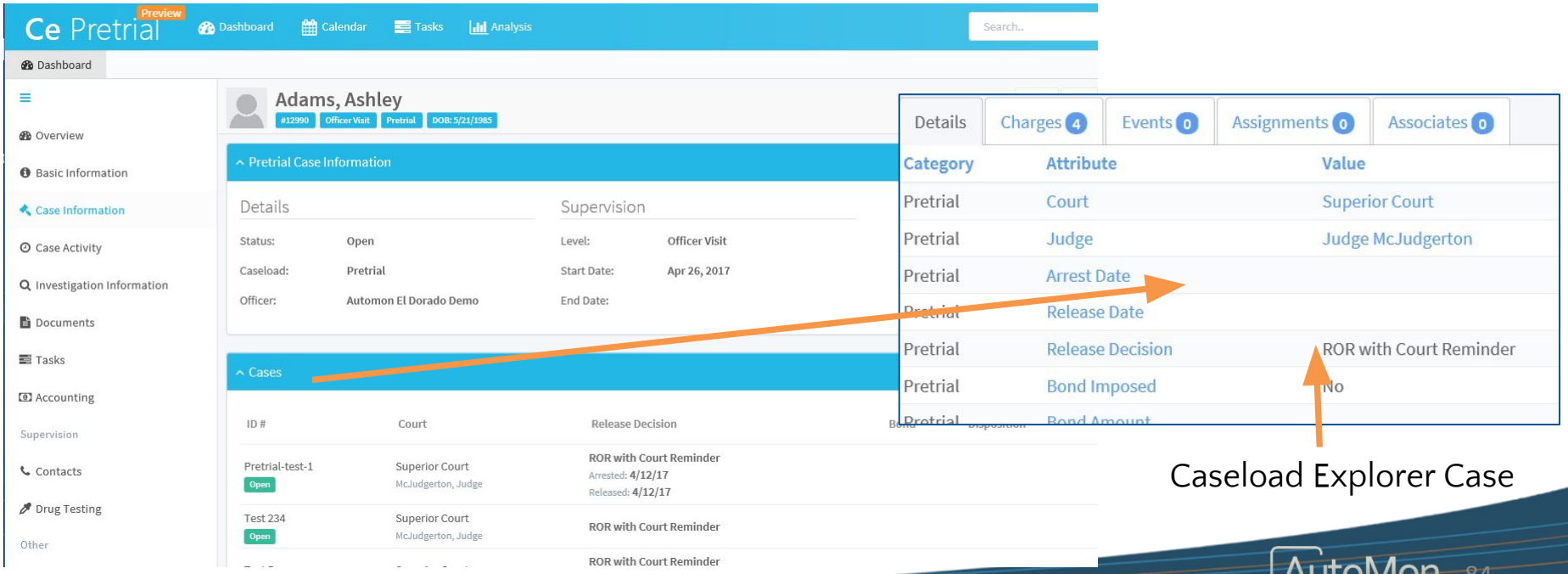


Caseload Explorer Case Folder and Pretrial Case Service

Data Sync

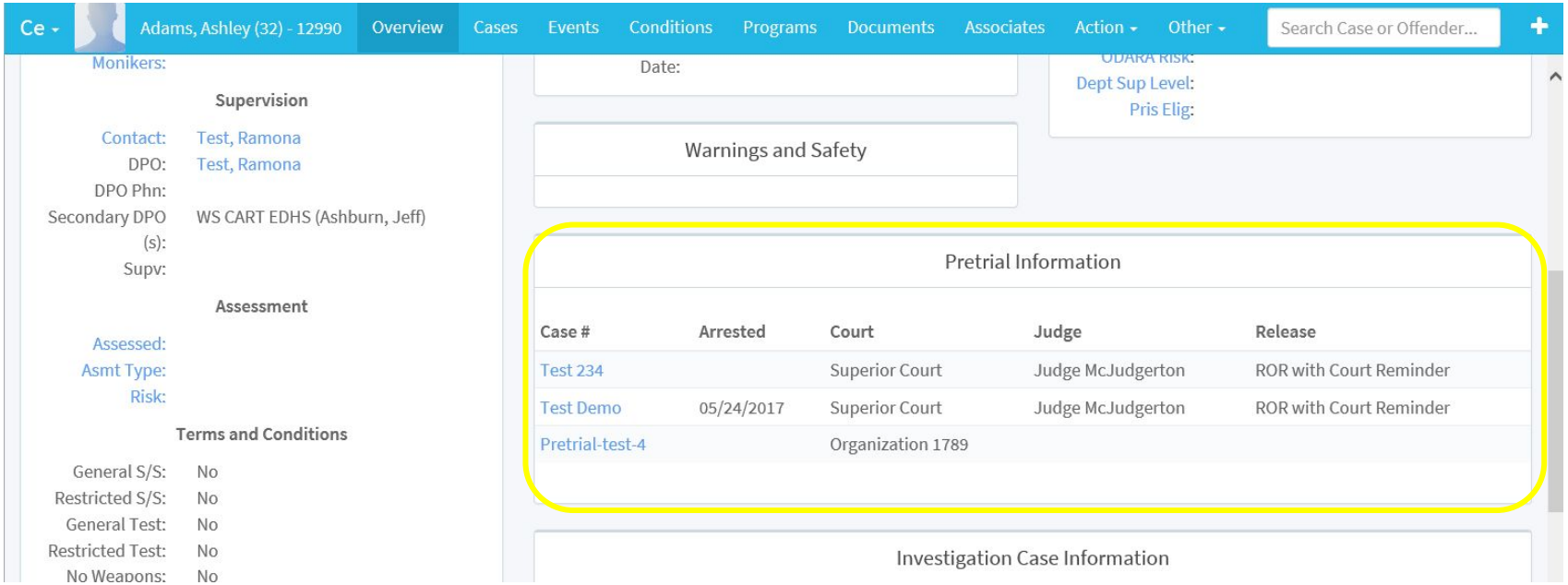
Defendant and case information will synchronize in real time when changes are made in Caseload Explorer or Ce Pretrial. This will allow for case information to be displayed on the Caseload Explorer Cases tab and an overview panel. Defendant basic information and demographics will be updated in each system 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.



Panel

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.



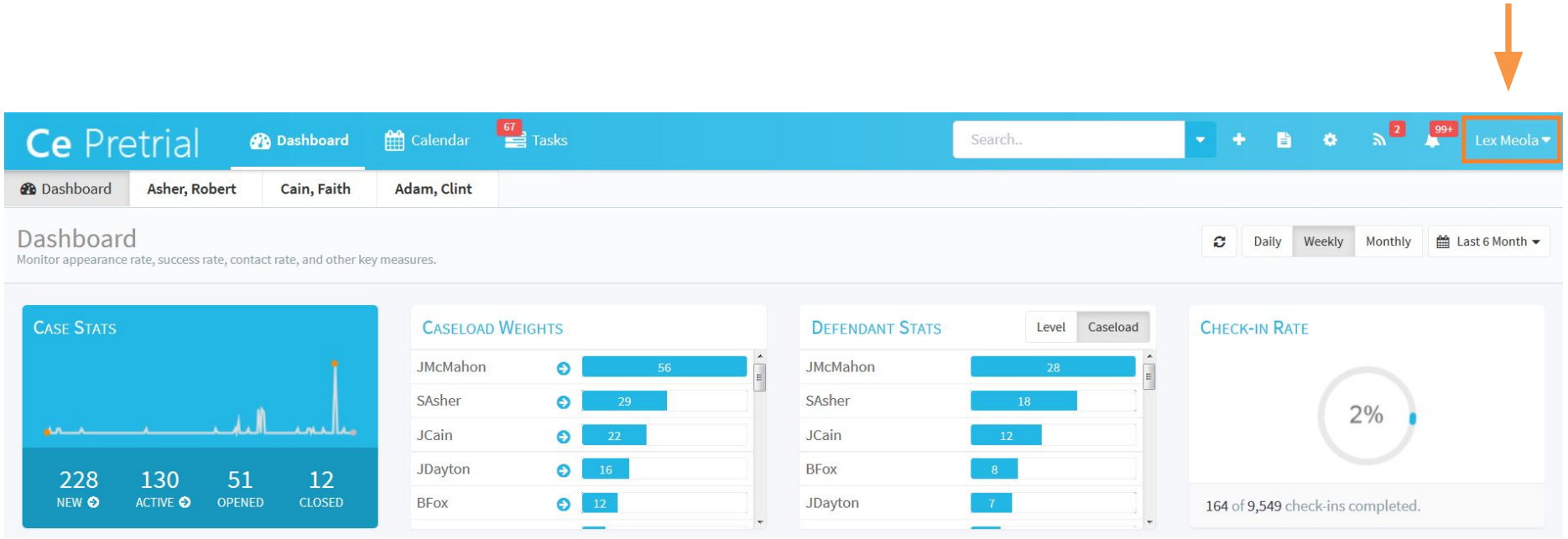
Topic 19: User Drop-Down or Sign Out

Subtopics:

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

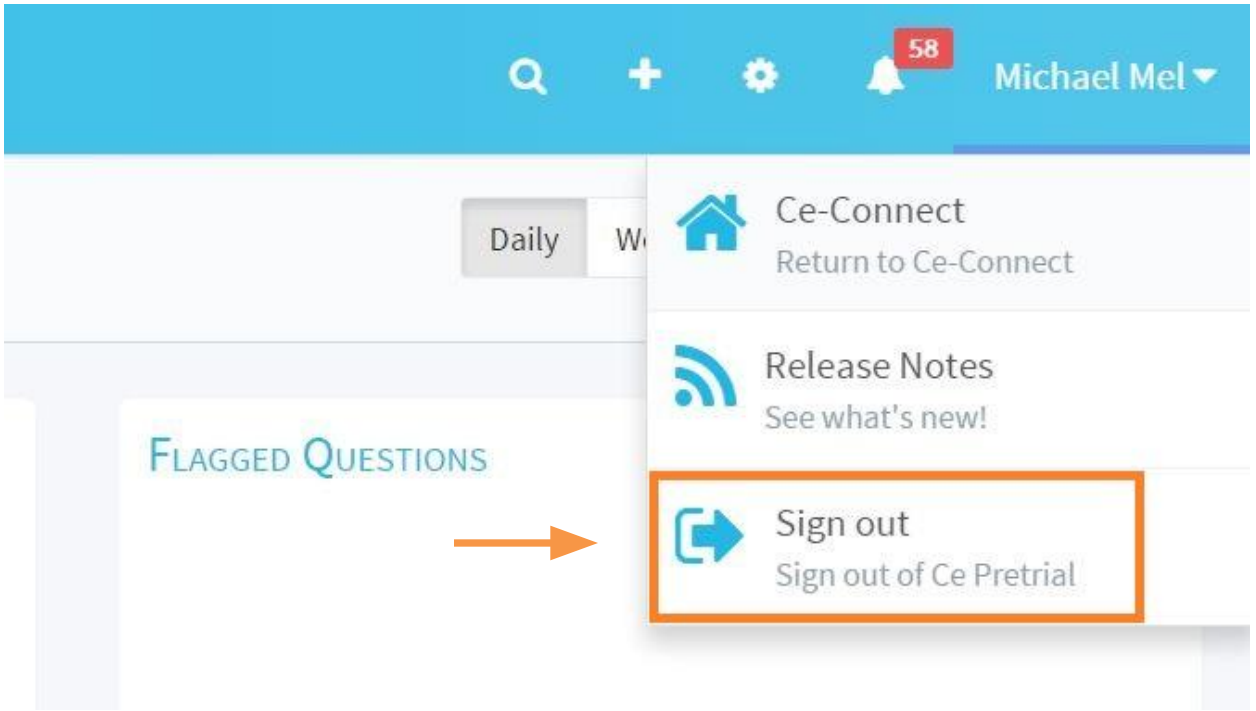
Navigate to The user Drop-Down Menu

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.



Sign out of Ce Pretrial

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.



CePretrial

Topic 20: Accessing TeamSupport

Subtopics:

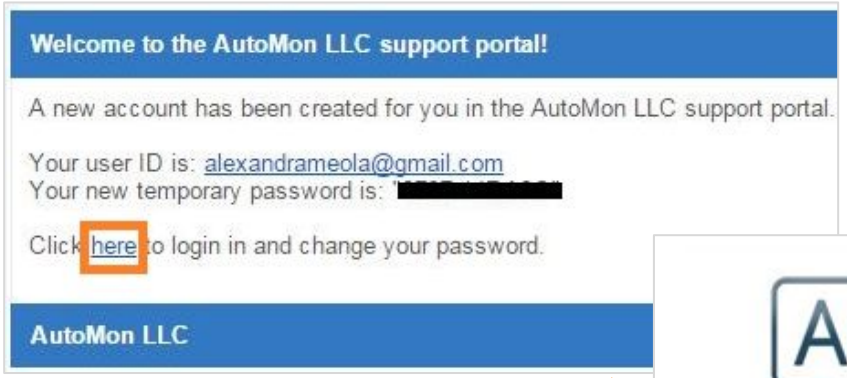
1. Knowledge Base
2. Requesting Access to Knowledge Base
3. Changing Temporary Password
4. Search Knowledge Base by Keyword
5. Reporting Issues
6. Video Tutorials
7. Ongoing Support

Knowledge Base

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.

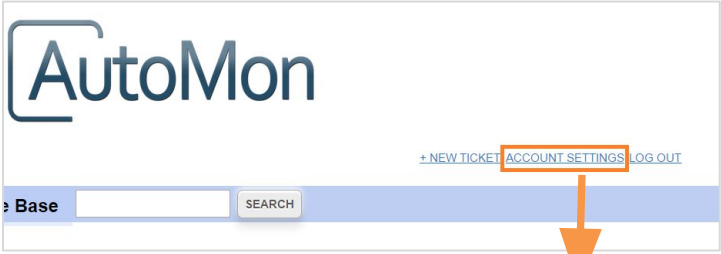
Requesting Access to Knowledge Base

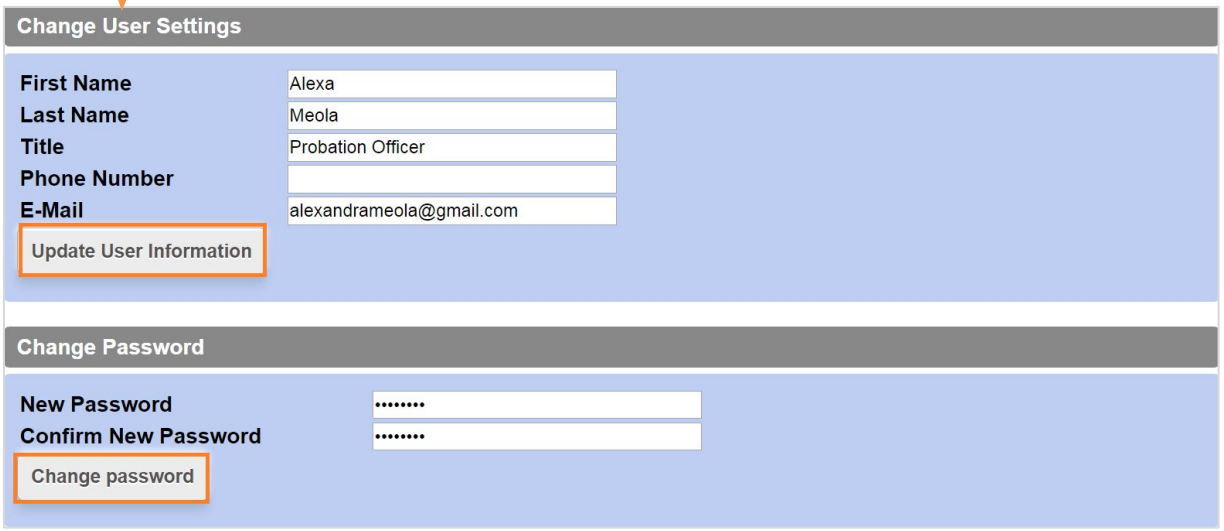
If the user has not used Knowledge Base before, they must first request access. To request access, the user must enter their email address and click "**Request Access**". The user will receive an email with a user ID and temporary password. The email will include a link to login and change their temporary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



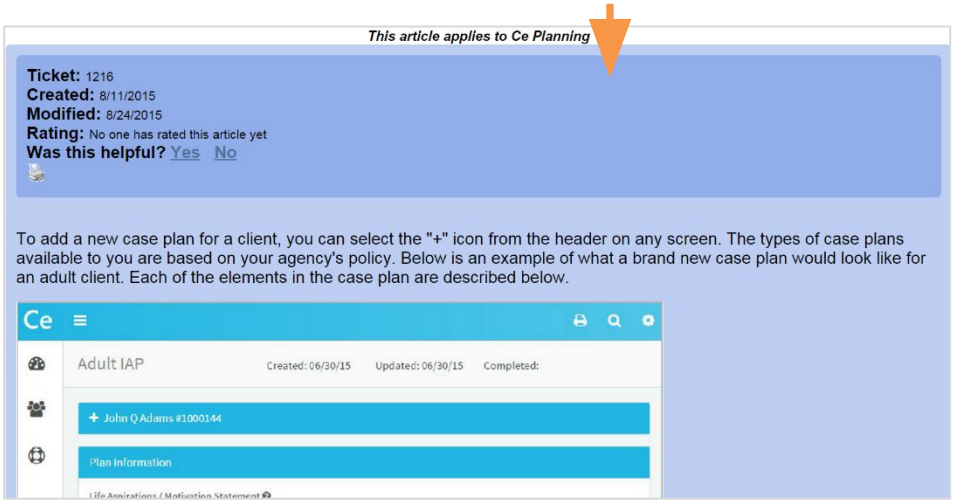


Searching Knowledge Base By Keyword

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.

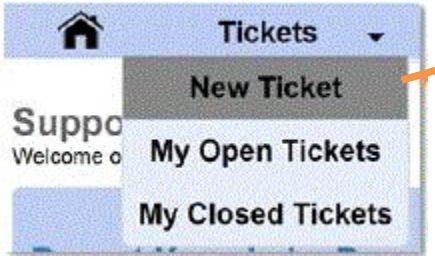
Tickets

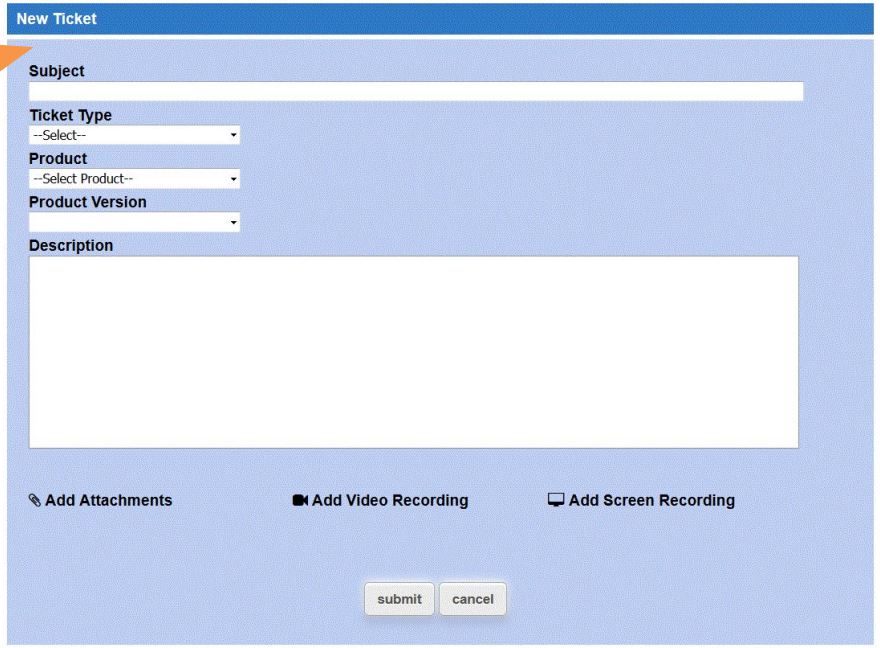
Ticket #	Ticket Name	Date Created	Ticket Type
1216	Ce Planning: New Case Plan Screen	8/11/2015 2:14:19 PM	Knowledge Base
1061	Managing Assessees: Creating a New Assessee Record	7/31/2015 11:37:19 ...	Knowledge Base



Reporting Issues

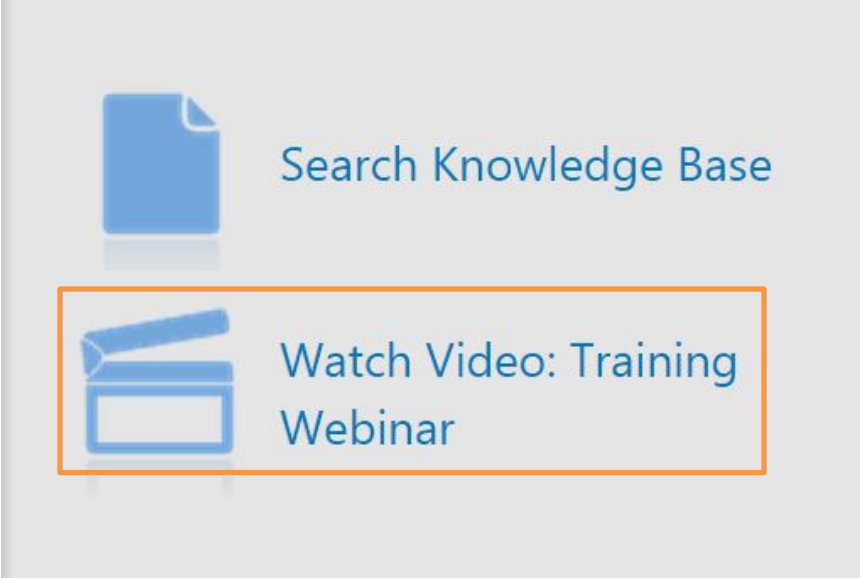
Any questions/issues/problems found should first be reported to your Supervisor. If your Supervisor is unable to answer the question and/or resolve the issue, then the Supervisor will report the issue to IT or your agency's designated contact. All relevant information will be necessary to relay to AutoMon (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.





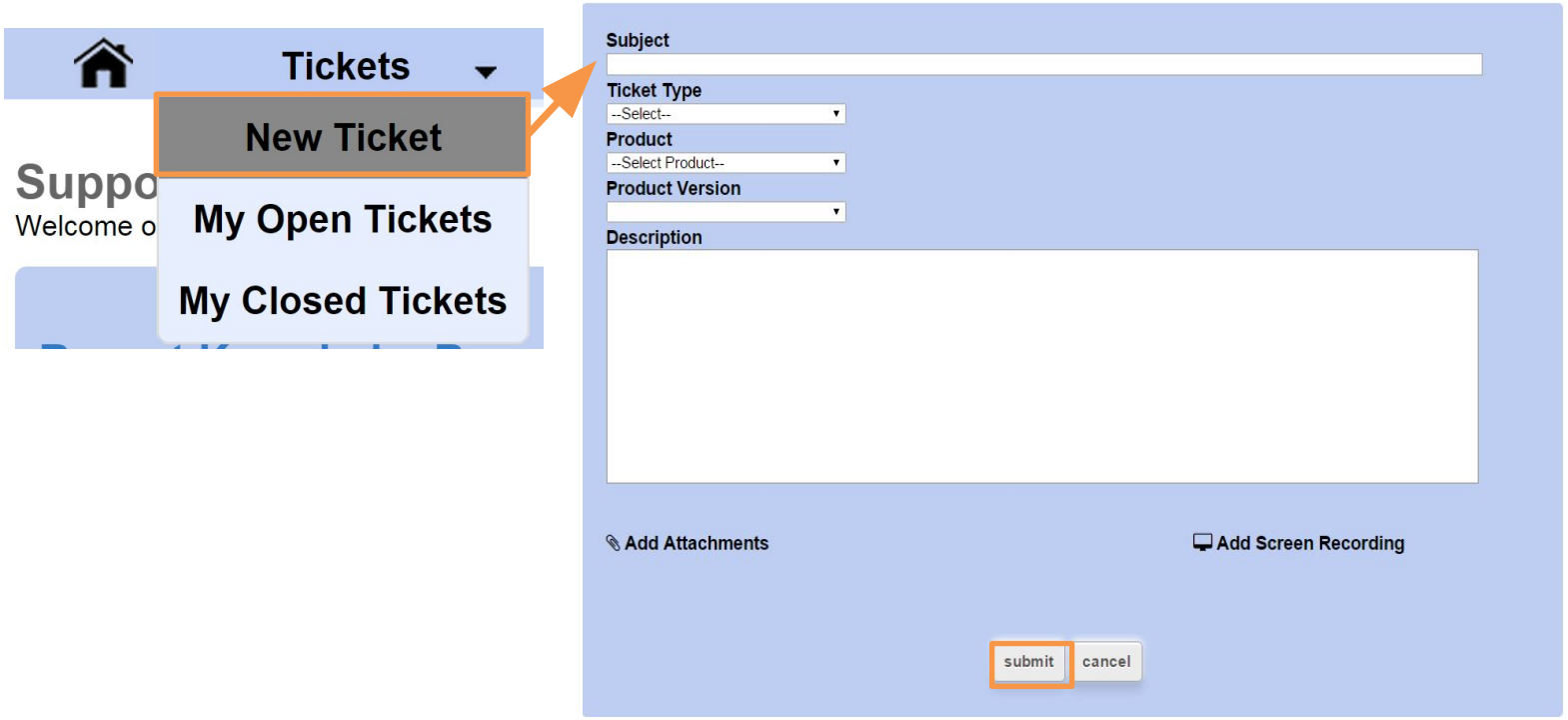
Video Tutorials

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.



Ongoing Support

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.



CePretrial

Training Review & Wrap-up

Training Topics - Revisited

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

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.

CHANGES
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