Ce Check-In

Offender Web & Kiosk Reporting

Web User Guide

Version 2.0.8

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About Ce Check-in

Ce Check-in is a flexible and powerful client reporting solution for community-based corrections agencies. Available as both a web and kiosk reporting solution, Ce Check-in serves as an ideal reporting tool for your low-risk clients or as an enhanced, supplemental supervision tool for your high-risk clients. Ce Check-in allows you to manage reporting frequencies and alerts you when clients are out of compliance.

Ce Check-in Web

Ce Check-in Web is comprised of a web-based client portal for clients on supervision and an administrative officer portal for community corrections staff to monitor client compliance.

Client portal for supervised clients

The client portal includes the following features:

- Secure user registration with PIN and password
- Ability for clients to check-in from any web-enabled device such as a desktop computer or mobile device
- Multi-language support for English and Spanish
- Ability for clients to capture an image for identification via web camera
- Ability for clients to complete a required questionnaire assigned by community corrections staff
- Automatic email and text message reminders to clients regarding upcoming report dates, missed reports, and reporting schedule changes

Officer portal for community corrections staff

The officer portal includes the following features:

- Secure user registration with email verification and password
- Ability for staff to sign in from any web-enabled device such as a desktop computer or mobile device
- A dashboard that provides key reporting metrics
- A news feed that displays important events, such as missed reports and client responses to flagged questions

Officer portal features *(continued)*

- Ability to review client check-in history, registration status, and eligibility for certain reporting methods
- Agency-specific questionnaires and client reporting schedules
- Ability to exchange text messages with clients from within the application

Caseload Explorer integration

If your agency also uses Caseload Explorer from AutoMon, Ce Check-in integrates with Caseload Explorer to sync client data between the two applications. Synced data includes:

- Client demographics
- Caseload assignment
- Risk classification
- Completed and missed check-ins

Ce Check-in Kiosk

Ce Check-in also provides kiosk functionality through a separate subscription. Contact sales@automon.com for details on Ce Check-in Kiosk.

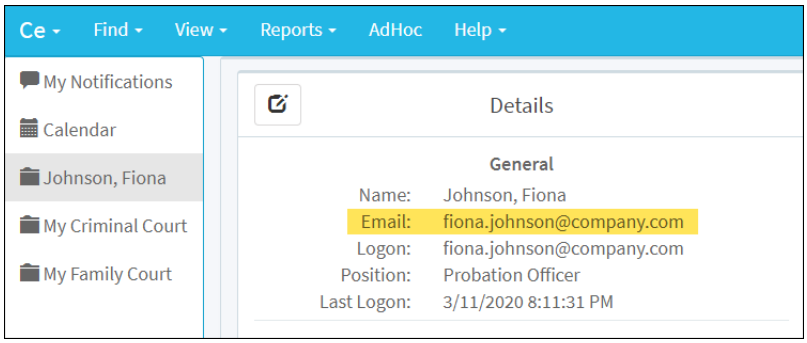
Supported browsers

Ce Check-in and the client portal are supported on multiple modern web browsers, including:

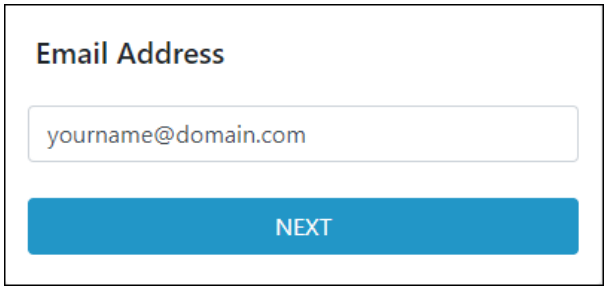
- Microsoft Edge
- Apple Safari
- Mozilla Firefox
- Google Chrome

Creating your Ce Check-in profile

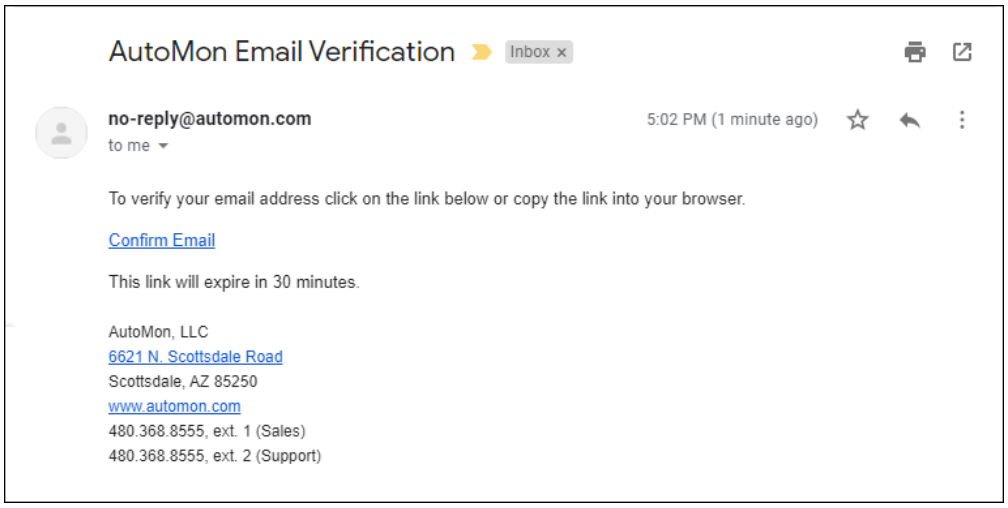
To get started using Ce Check-in, you'll first need to create a profile using your email address. First ensure that you have a valid email address listed in your Caseload Explorer account. You'll use this email address to create your profile in the following steps.



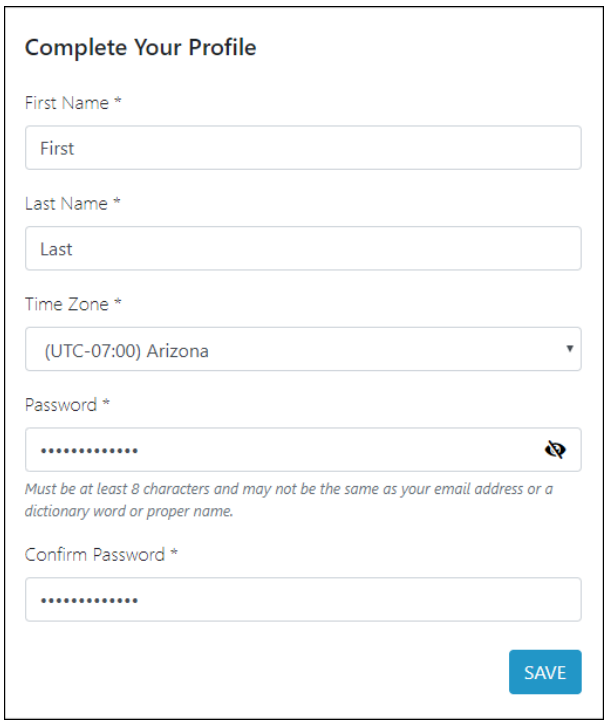
1. Open a web browser and go to https://www.automonapps.com.
2. Enter your email address and click **Next**.



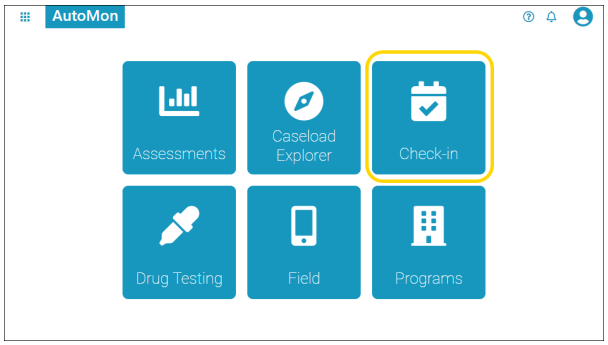
3. AutoMon will send a verification link to the email address you entered. Access your email and click on the link to verify your email address.



4. After you verify your email address, complete your Ce Check-in profile. Enter your name, select a time zone, and create a password. When you're ready, click **Save**.



5. The ***AutoMon Apps*** page appears and displays the applications your agency subscribes to. Click the **Check-in** tile to access Ce Check-in.

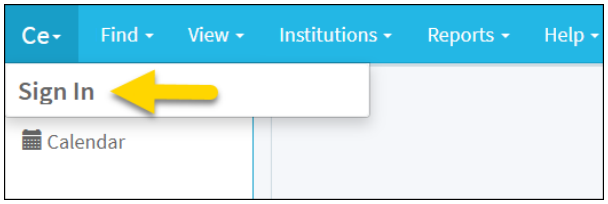


> **Note:** If you or your agency has access only to Ce Check-in, the ***AutoMon Apps*** page will not appear. Instead, you'll be taken directly to Ce Check-in.

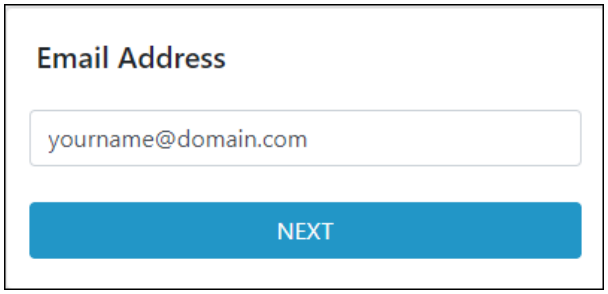
Signing in to Ce Check-in

After you've created your profile, you can access the Ce Check-in officer portal with your email address and password.

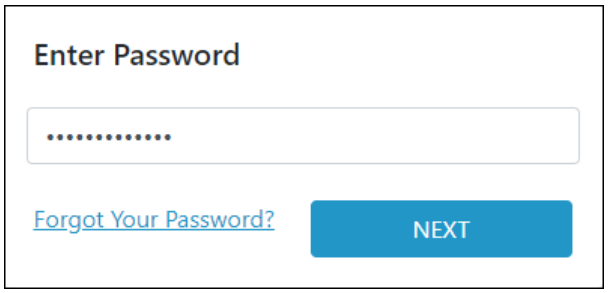
1. Sign in to Caseload Explorer.
2. On the top left, click **Ce** and select **Sign In**.



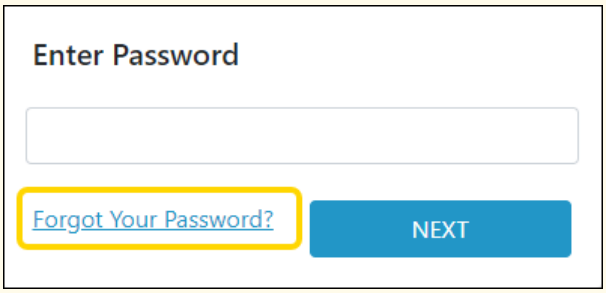
3. A new window appears. Enter your email address and click **Next**.



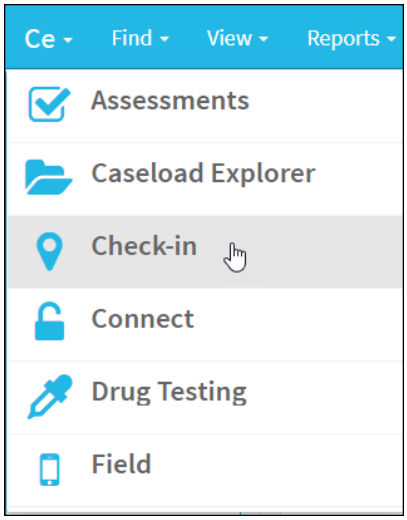
4. Enter your password for Ce Check-in and click **Next**.



Tip: If you forget your password, click **Forgot Your Password?** AutoMon will send you an email with instructions to create a new password.

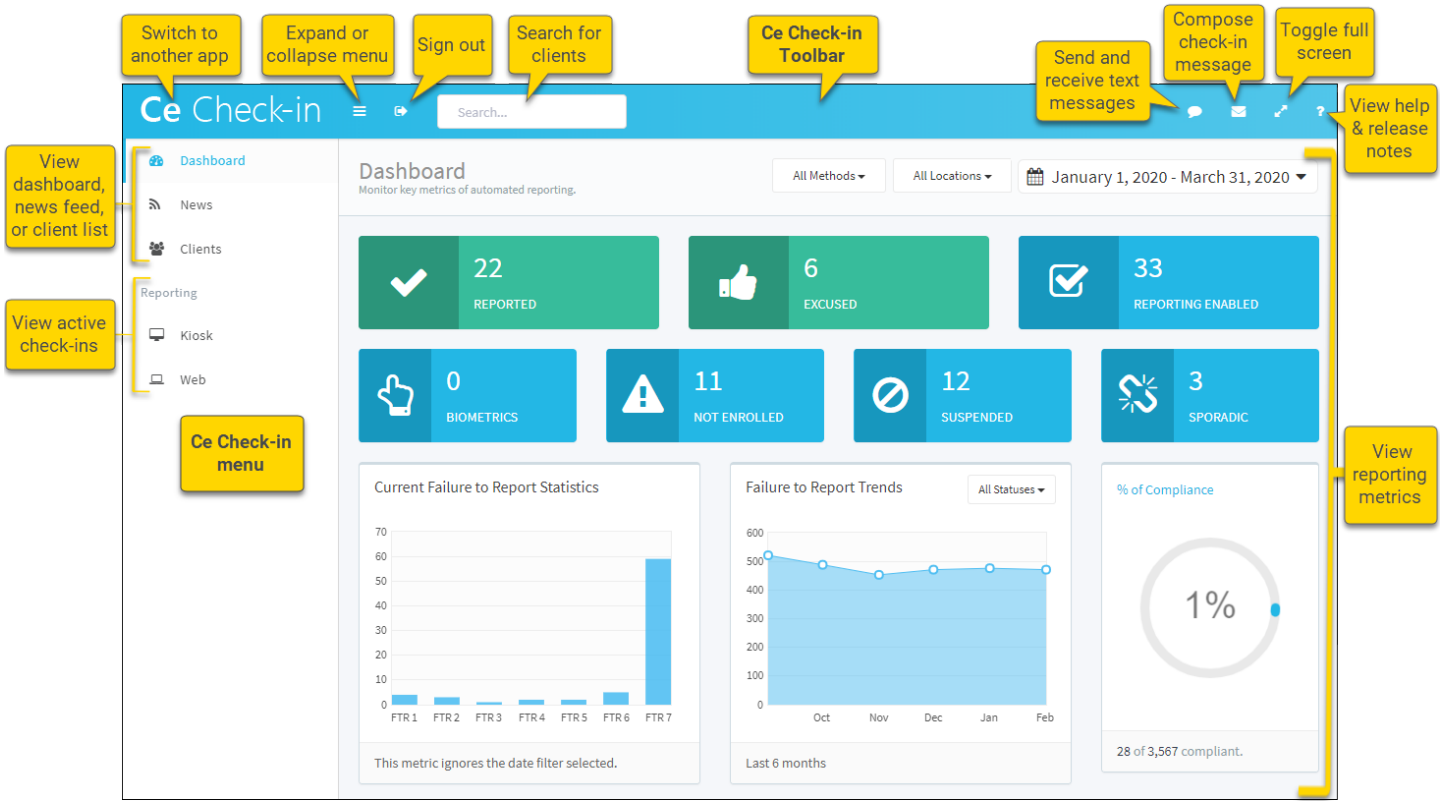


5. The window closes. Return to Caseload Explorer, click **Ce** and select **Check-In**.



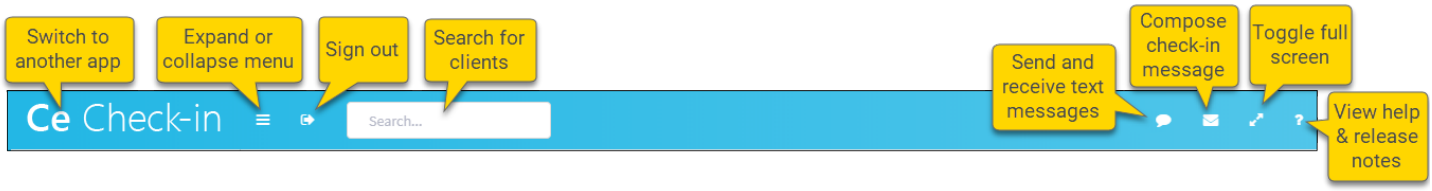
Getting around Ce Check-in

Each time you sign in to Ce Check-in, you'll see the ***Dashboard***. To help you get around, review the following user interface components, functions, and features.

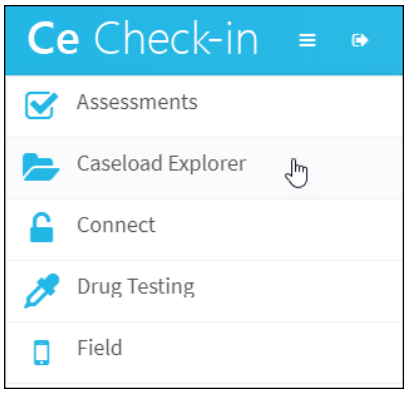


Ce Check-in Toolbar

You can access the following functionality from the toolbar at the top of Ce Check-in:



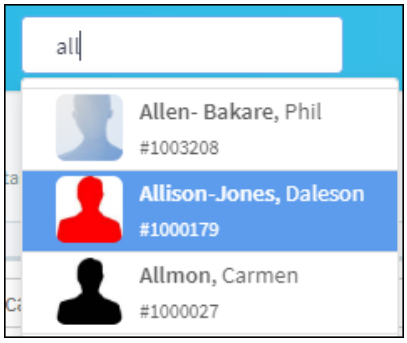
Task Switcher: If you have access to multiple AutoMon applications, you can quickly select another application to view. Click the **Ce Check-in** logo at the top left and select an application to switch to it.



Hamburger icon: Click to collapse or expand the Ce Check-in menu.

Sign out icon: Click to sign out of Ce Check-in.

Search bar: Search for clients by first name, last name, or PIN. You must enter at least three characters for the system to start displaying results.



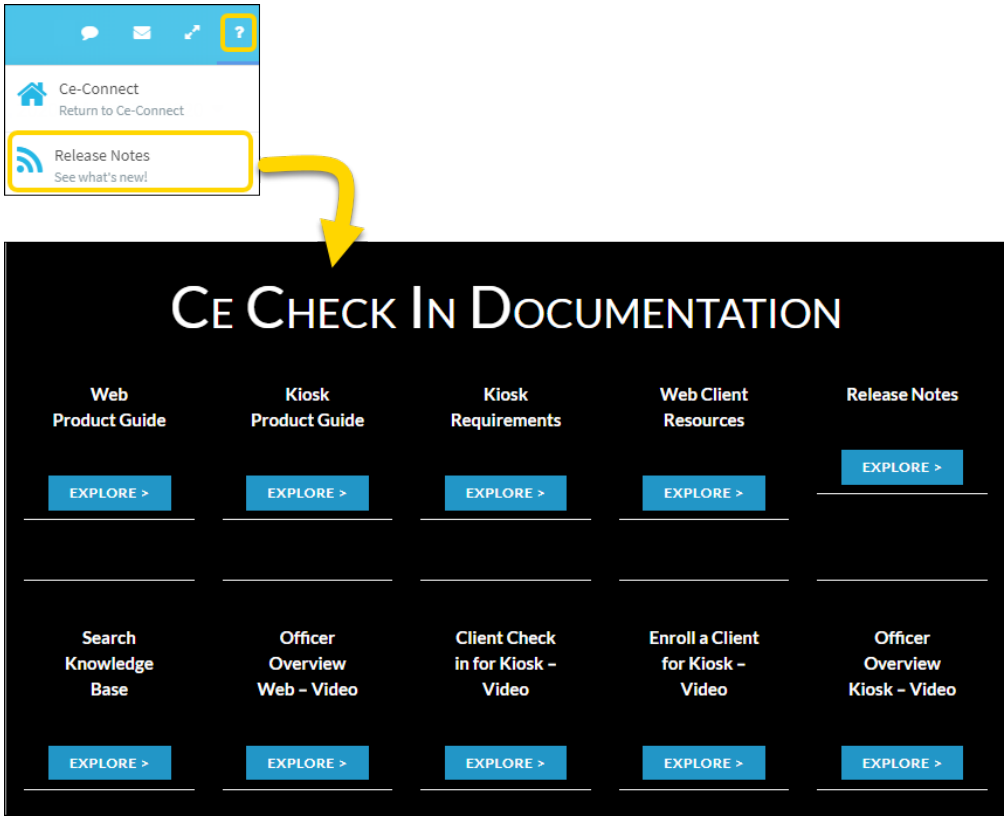
Click on the client's name from the results list to go to their ***Client Overview*** page. See "About the Client Overview page" on page 47 to learn more.

SMS chat icon: Click to open the ***SMS Chat*** panel, where you can exchange SMS text messages with clients. See "About text messaging" on page 1 to learn more.

Compose check-in message icon: Click to compose a message to a client that displays on their screen the next time they check in. See "Composing client check-in messages" on page 62 to learn more.

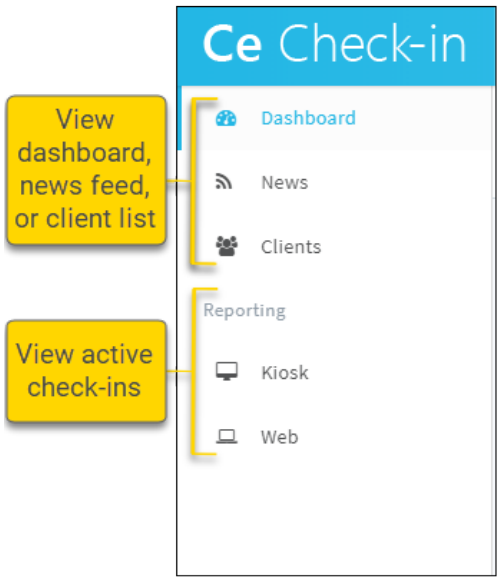
Full screen icon: Click to maximize Ce Check-in to full screen, giving you more visibility. Click again to restore to the original size.

Help icon: Click and select **Release Notes** to open the ***Ce Check-in Documentation*** page. From there you can view release notes, user guides and videos, and search the knowledge base. See "Using the knowledge base" on page 77 to learn more.



Ce Check-in menu

From the menu on the left of Ce Check-in, you can access the ***Dashboard***, ***News Feed***, ***Clients*** list view, and lists of active check-ins.



The ***Dashboard*** displays key reporting metrics that update in real time. Metrics include the number of completed and excused check-ins, the number of sporadically reporting clients, and statistics and trends for check-ins, failures to report (FTRs), and overall compliance. To learn more, see "About the Dashboard and metrics" on page 34.

The ***News Feed*** displays important events such as missed check-ins and answers to flagged questions. To learn more, see "About the News Feed" on page 41.

The ***Clients*** list view displays a list of all clients assigned to the caseloads you supervise and provides access to the ***Client Overview*** page for each client. To learn more, see "About the Clients list view" on page 44.

The ***Kiosk*** and ***Web*** reporting pages display any currently active check-ins. To learn more, see "Viewing active check-ins" on page 52.

Ce Check-in Workflow

Overview of Ce Check-in workflow

The Ce Check-in workflow is designed to follow the general workflow of most probation agencies and includes the following segments. This process assumes your agency uses Ce Check-in in conjunction with Caseload Explorer.

1. **Add a client** to Caseload Explorer and enter required data. The client then syncs to Ce Check-in automatically.
2. **Assign a reporting schedule** to the client based on their classification. Depending on your agency's Ce Check-in configuration, a reporting schedule may be assigned to the client automatically, but you can modify it.
3. **Facilitate the client's registration** for the client portal so they can start checking in.
4. **Monitor the client's compliance** with their reporting schedule. Excuse or substitute check-ins as appropriate.
5. **Disable the client's reporting schedule** in Ce Check-in when they are no longer eligible or required to report. Closing the client's active case(s) in Caseload Explorer automatically disables the client's reporting schedule in Ce Check-in.

Start workflow

To start the workflow, proceed to "Step 1: Add/sync client" on page 15.

Step 1: Add/sync client

Adding clients to your Ce Check-in implementation requires syncing them from Caseload Explorer; you won't add clients to Ce Check-in directly. Complete the following steps to ensure syncing works properly.

1. In Caseload Explorer, ensure the client is assigned to an *active* caseload and that the client's record has valid values for the following fields:
   - First and last names
   - Date of birth
   - Gender
   - PIN (the PIN becomes the client's ID number in Ce Check-in).
2. (Optional): Enter the client's email address and/or mobile phone number to the client's record in Caseload Explorer. While not required to sync the client, we recommend you enter this information so that Ce Check-in can use it to send email or text message notifications to the client informing them of their reporting requirements.
3. Assign a supervision level to the client in Caseload Explorer. Typically, you'll determine the supervision level based on the outcome of a risk assessment. Depending on how your agency's Caseload Explorer implementation is configured, do one of the following to assign the supervision level:
   - Go to the ***Events*** page and create a new event with **Type: Assessment**. At the bottom of the ***Create Event*** page, select the **Supervision Level** from the drop-down menu.
   - Edit the client's **Attributes** section and select a value for the **Supervision Level** field.

> **Note:** Instead of assigning a supervision level to the client, your agency may choose to enable a flag called **Is Reporting** on your caseloads. This method allows the client to sync to Ce Check-in without having an assigned supervision level; instead, the client just has to be assigned to a caseload that has the **Is Reporting** flag enabled. Consult with your system administrator for details on the method your agency has elected to use.

Result

When the above requirements are met for a client, Ce Check-in will sync the client's record from Caseload Explorer automatically.

Next step

After the client is synced to Ce Check-in, you can assign the client's reporting schedule. Depending on your agency's Ce Check-in configuration, a reporting schedule may be assigned to the client automatically, but you can modify it. To learn more, proceed to "Step 2: Assign reporting schedule" on page 17.

Trouble syncing?

If you've completed the above process and the client record is not syncing to Ce Check-in, there may be data errors present in Caseload Explorer that you need to correct.

Syncing clients will not work properly if:

- The client record does not have a first name.
- The client record does not have a date of birth.
- Another client's record has the same email address.
- The client's address line 1 exceeds 50 characters.
- The client's address line 2 exceeds 50 characters.
- The client's state exceeds 2 characters.

If you sync errors persist, consult your system administrator.

Step 2: Assign reporting schedule

After the client is synced to Ce Check-in, you can assign the client's reporting schedule (e.g., determine how often the client should check in). Depending on your agency's Ce Check-in configuration, the system may assign a reporting schedule automatically based on the client's caseload, but you can still modify the reporting schedule manually.

Note: If you assigned a supervision level to the client in Caseload Explorer, it becomes the client's *classification* in Ce Check-in. Your agency may use client classifications to determine reporting schedules.

Warning: Once the client's reporting schedule is assigned (whether you assigned it manually or the system assigned it automatically) the client is then officially **active** in the system. This means:

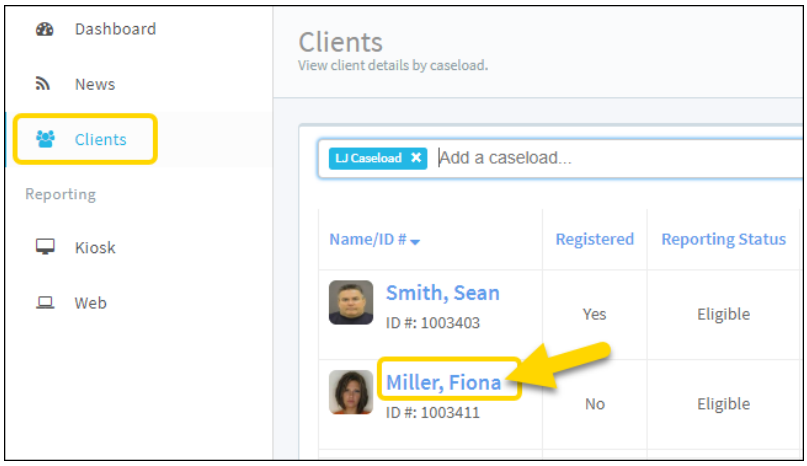
- The system will start monitoring the client's reporting compliance and recording any missed check-ins.
- The client will begin receiving notifications about their reporting requirement (if your agency enabled the notifications feature). See "Using automated client notifications" on page 71 to learn more.

We recommend that you notify clients ahead of time that you are enrolling them in Ce Check-in and that they'll start receiving notifications.

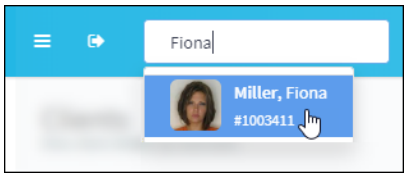
How to assign or modify a client's reporting schedule

You can assign or modify a client's reporting schedule from their ***Client Overview*** page in Ce Check-in.

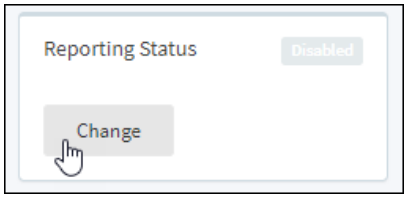
1. Open the ***Client Overview*** page by doing one of the following:
   - From the left menu, click **Clients** to open the ***Clients*** list view. Locate the client in the list and click on their name.



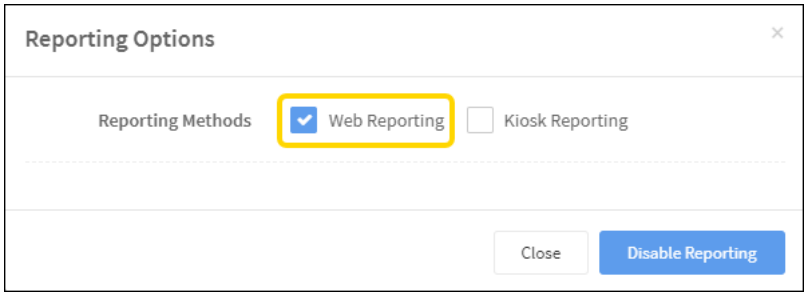
   - Search for the client from the toolbar and click on their name.



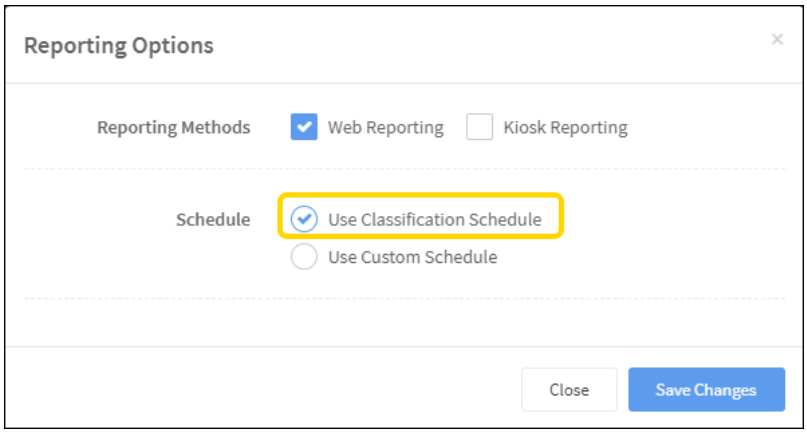
2. In the **Reporting Status** section, click the **Change** button.



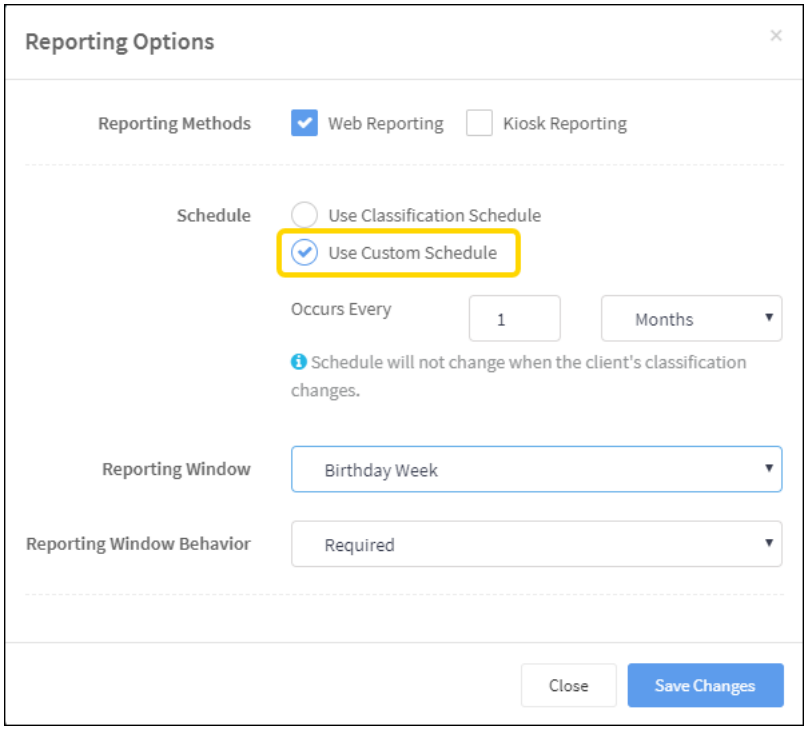
3. The **Reporting Options** dialog box opens. Next to **Reporting Methods**, select **Web Reporting** to grant the client access to complete web check-ins.



4. Next to **Schedule**, select whether to use a classification or custom schedule.
   - **Use Classification schedule:** You can select this option if your agency elected to use the client's classification (i.e., supervision level) to automatically determine how often the client should check in. For example, clients classified as low risk may be required to check in monthly, while clients classified as medium risk may be required to check in biweekly, etc. If your agency did not elect to implement classification schedules, this option is disabled (grayed out).



   - **Use Custom schedule:** Select this option to manually specify how often the client should check in. You can select this option whether or not your agency also uses classification schedules.



     a. Next to **Occurs Every**, select the check-in frequency. For example, select **1** and **Months** to specify the client should check in every month, or select **2** and **Weeks** to specify the client should check in every two weeks.

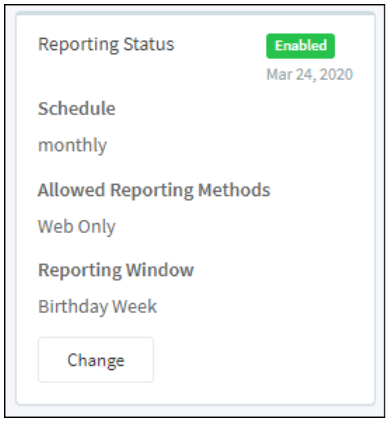
b. If you selected **Months** above, you can specify the **Reporting Window**, which dictates which day of the month the client should check in.
   - Select **Anytime** to specify the client can check in at any day of the month.
   - Select **Birthday Week** to specify the client should check in on a day that falls within their birthday week (for example, if a client's birthday is January 5th, this option dictates the client should check in during the week of the 5th of each month: the week of May 5th, the week of June 5th, etc).
   - Select **Days 1 through 10** to specify the client should check in within the first 10 days of the month. This option discourages the client from attempting to complete back-to-back check-ins on the last day of the month and the first day of the next month.

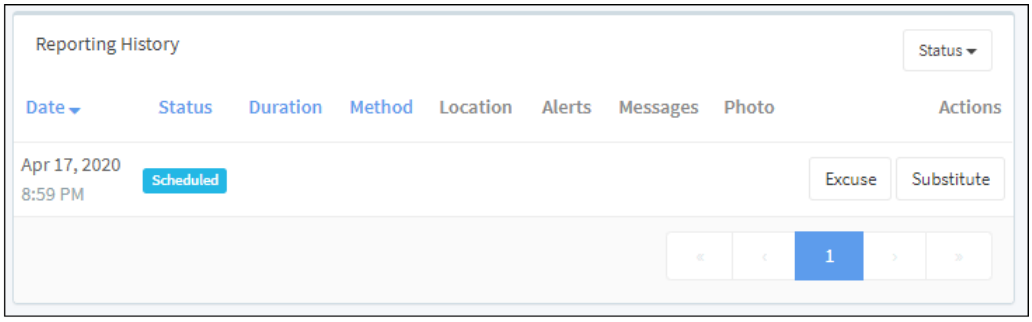
c. If you specified a **Reporting Window** for a monthly schedule, select an option for **Reporting Window Behavior**:
   a. Select **Required** to specify that the client is required to adhere to the specified reporting window.
   b. Select **Recommended Only** to specify that you are recommending the client adhere to the specified reporting window, but they are not required to.

5. When you're ready, click **Save Changes** at the bottom of the dialog box.

Result

The client's new (or modified) reporting schedule is now enabled and displays in the **Reporting Status** section. Their first check-in is scheduled in the **Reporting History** section. The client will receive a notification letting them know their reporting schedule is updated (if your agency enabled the notifications feature).





Next step

The client can now register for Ce Check-in and begin completing check-ins from the client portal. Proceed to "Step 3: Facilitate client's registration" on page 21.

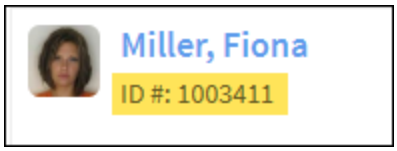
Step 3: Facilitate client's registration

Once the client has an assigned reporting schedule in Ce Check-in, they are officially **active** in the system and can register for the Ce Check-in client portal. Although clients can complete registration on their own, we recommend you complete both registration and the client's first check-in together to confirm the client understands the process.

> **Tip:** For Ce Check-in Web, AutoMon provides a handbook template that you can adapt for your agency and distribute to your clients. This handbook walks clients through the process of registering for Ce Check-in and completing web check-ins from the client portal. Access the ***Documentation*** page to download the handbook template.

Before registering

To register and complete check-ins, the client needs their PIN from Caseload Explorer (which became their ID number during sync to Ce Check-in). This number distinguishes clients who may have the same name and date of birth. **Provide the client their PIN/ID number before starting registration.**

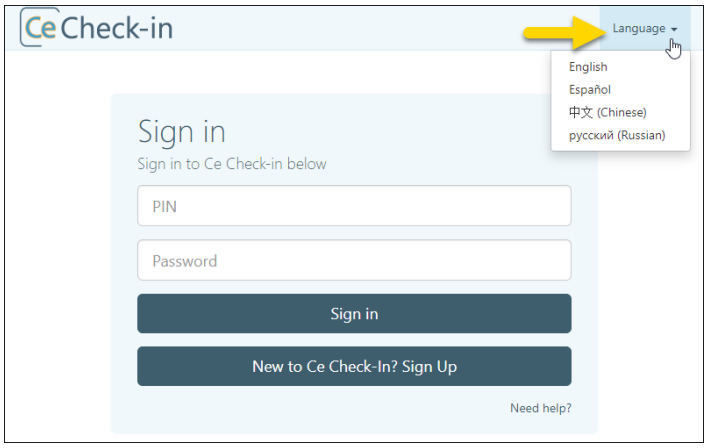


How to complete client registration

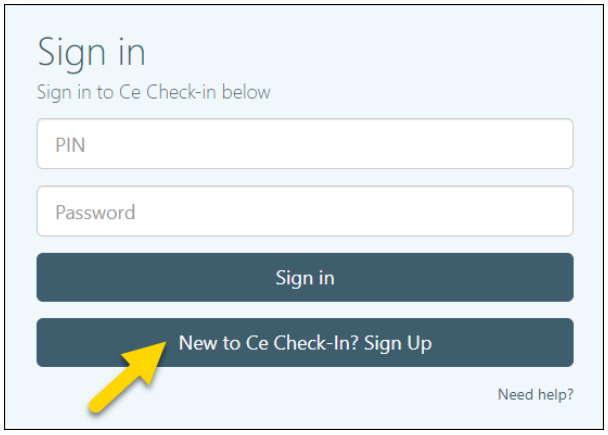
The client completes the following steps.

1. Open a web browser and go to www.cecheckin.com.

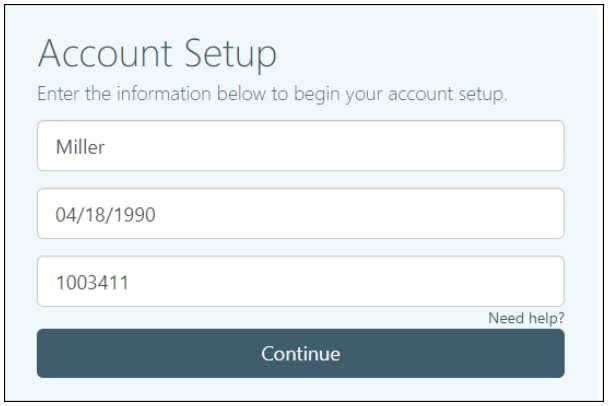
2. By default, the page displays in English. If the agency implemented other languages, the client can select the language from the drop-down menu at the top right.



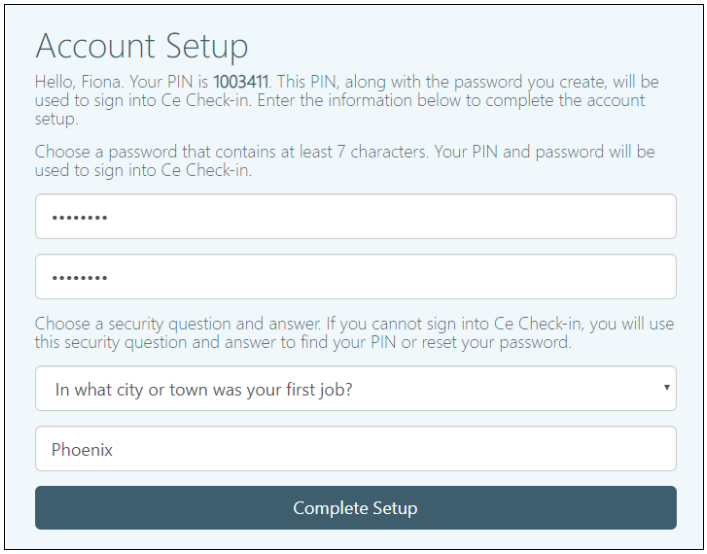
3. Click **New to Ce Check-in? Sign up**.



4. Enter client **Last Name**, **Date of Birth**, and **PIN**.Then click **Continue**.



5. Create a password and set up a security question and answer. Then click **Complete Setup**.



Result: Client registration is complete. The client can now use their PIN and password to complete check-ins from the client portal. We recommend you complete the client's first check-in together to confirm the client understands the process.

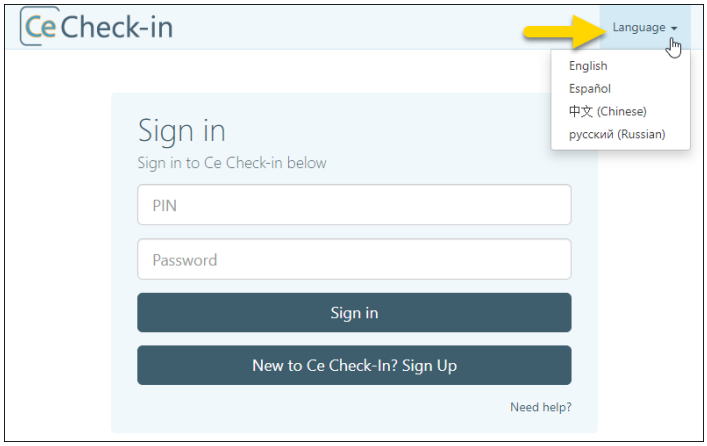
How to complete a web check-in

The check-in process typically involves three steps: Take a photo, read any officer messages, and complete a questionnaire. Your agency selects which questions appear on the questionnaire. See "Sample check-in questions" on page 76 for a list of common questions.

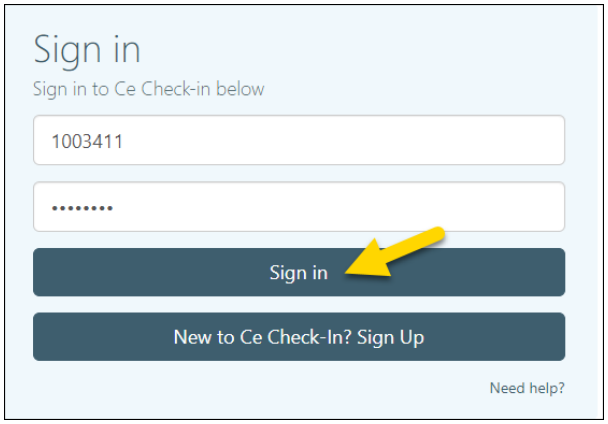
The client completes the following steps.

1. Open a web browser and go to www.cecheckin.com.

2. By default, the page displays in English. If the agency implemented other languages, the client can select a different language from the drop-down menu at the top right.

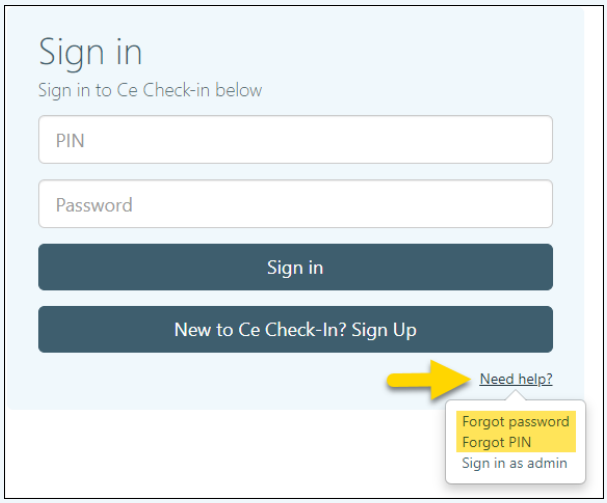


3. Enter client **PIN** and **Password**, then click **Sign in**.



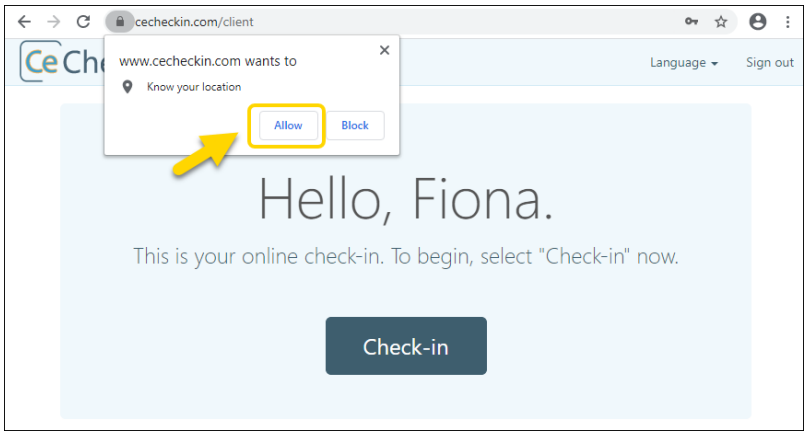
Note:

- If the client forgets their password or PIN, they can click **Need help?** and select either **Forgot password** or **Forgot PIN**. The client is prompted to select their jurisdiction (supervising agency), verify their identity, and answer their security question. The system then provides their PIN or resets their password.



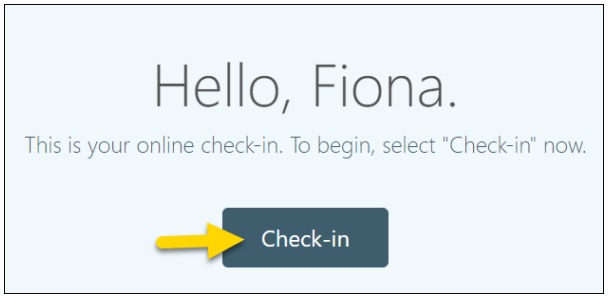
- If the client cannot remember the answer to their security question, you (the officer) can reset their registration. See "Resetting a client's registration" on page 75.

4. The browser may prompt to enable location and/or GPS tracking. Enable GPS on the device used to check in and allow location tracking in the browser when prompted. Following is an example of a browser prompt and may vary depending on the device and browser.

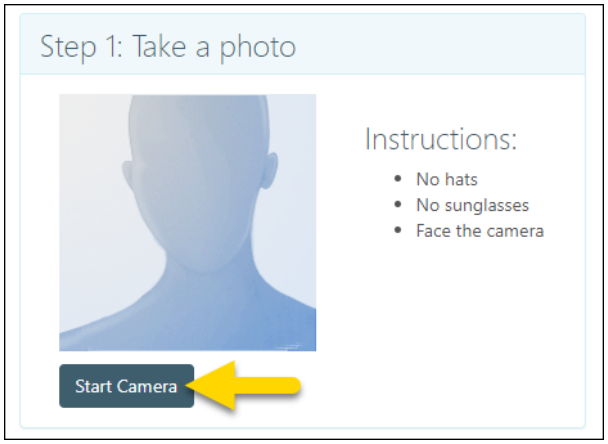


> **Note:** Officers: To learn more about how location tracking works in Ce Check-in, see "About GPS/location tracking" on page 61.

5. The ***Welcome*** page displays. Click **Check-in** to begin.



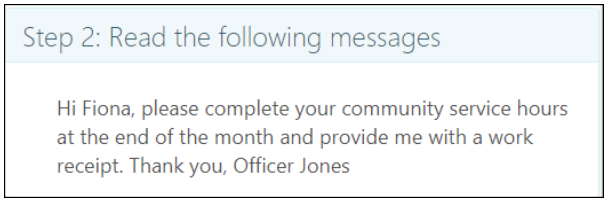
6. **Check-in step 1:** The client takes a photo of themselves to verify identity. Clients can use a web camera or mobile device camera to take the photo. Most operating systems and browsers are supported. Click **Start Camera**.



7. The camera initializes. When ready, click **Take Photo** to capture a photo.

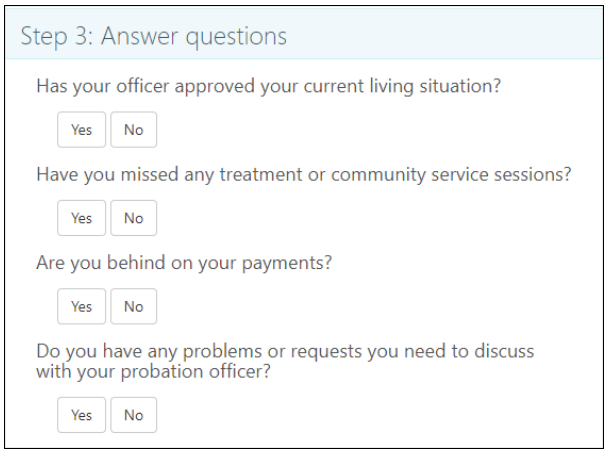
> **Tip:** To re-take the photo, click **Take Photo** again.

8. **Check-in step 2:** If the client has any messages to read from their officer, the messages are displayed on the screen. If the client has no messages to read, proceed to the next step.

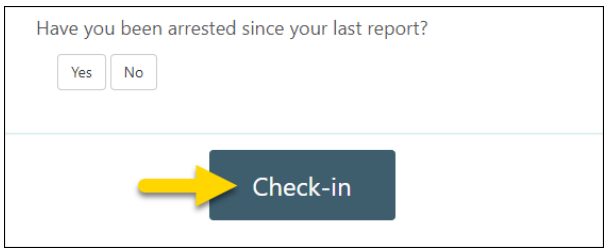


> **Note:** Officers: To learn more about composing client messages that display when clients check in, see "Composing client check-in messages" on page 62.

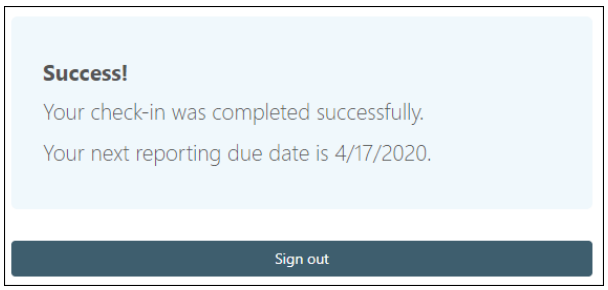
9. **Check-in step 3:** Complete the questionnaire. All responses require a "yes" or "no" answer.



10. After completing all the steps, click **Check-in** at the bottom.



Result: If the check-in was completed successfully, a message displays and indicates the due date of the next check-in. The due date is calculated based on the client's assigned reporting schedule.



Next step

After the client is registered and knows how to check in, they can proceed with regular check-ins according to their reporting schedule. Ce Check-in provides tools to help you monitor the client's compliance with their reporting requirement and track reporting history. Proceed to "Step 4: Monitor reporting compliance" on page 28.

Related topics

- If your agency enables notifications, Ce Check-in will notify clients when a check-in is coming due, when they've missed a check-in, and when their reporting schedule has changed or ended. See "Using automated client notifications" on page 71.
- To learn more about how the GPS/location tracking works in Ce Check-in, see "About GPS/-location tracking" on page 61.
- If a client ever forgets the answer to their security question and cannot retrieve their PIN or reset their password, you can reset their registration. See "Resetting a client's registration" on page 75.

Step 4: Monitor reporting compliance

Ce Check-in provides tools to help you manage your clients' check-ins and monitor their compliance. You can also use Ce Check-in to communicate with clients directly and view overall check-in metrics for your agency.

About missed check-ins

The following table lists the allowed check-in windows for each reporting schedule. If the client does not complete their scheduled check-in during the allowed window, Ce Check-in records the check-in as **Missed** and includes it in the client's failure to report (FTR) count.

Note: The allowed window is based on the client's time zone.

Reporting Schedule	Allowed Check-in Window
Daily	Starts at midnight and ends at 11:59PM daily.
Weekly	Starts at midnight on Sunday and ends at 11:59PM on Saturday of that week.
Monthly: Anytime	Starts at midnight on the 1st of the month and ends at 11:59PM on the last day of that month.
Monthly: Birthday Week	Starts at midnight on the Sunday of the birthday week and ends at 11:59PM on Saturday of that week.
Monthly: Days 1-10	Starts at midnight on the 1st of the month and ends at 11:59PM on the 10th day of that month.
Quarterly	Begins at midnight on the first day of the quarter and ends at 11:59PM on the last day of the quarter.

Review client check-in history and compliance

- "About the Clients list view" on page 44: The ***Clients*** list view displays all clients assigned to the caseloads that you or other staff members supervise. The list shows each client's registration and reporting status, number of failures to report (FTRs), date of their last report, and their reporting compliance percentage.
- "About the Client Overview page" on page 47: From the ***Client Overview*** page, you can review an individual client's check-in history and scheduled check-ins, view the data captured from completed check-ins, and manage the client's reporting method and schedule.
- "About the Dashboard and metrics" on page 34: The ***Dashboard*** displays key reporting metrics for your agency that update in real time.
- "Viewing check-in records in Caseload Explorer" on page 58: Records of check-ins in Ce Check-in are automatically populated in Caseload Explorer to reduce duplicate entry and save time.

Get notified of important check-in events

- "About the News Feed" on page 41: The ***News Feed*** displays important events regarding the clients you supervise so that you can take any necessary follow-up action. The ***News Feed*** categorizes events by type and includes missed check-ins, check-ins completed without a photo capture, and clients' answers to flagged check-in questions.

Excuse or substitute check-ins

- "Excusing check-ins" on page 54: You may wish to *excuse* one or more missed or scheduled check-ins if a client is hospitalized, entering treatment, incarcerated, or experiencing another circumstance that prevents them from checking in.
- "Completing substitute check-ins" on page 56: If you were recently in contact with a client due an office visit, appearance in court, or other circumstance, you may wish to *substitute* their scheduled check-in so that the client doesn't have to complete it.

Communicate with clients

- "Using SMS text message chat" on page 64: Ce Check-in supports sending and receiving text messages within the application so that you can communicate with clients without using your personal cell phone number or device.
- "Composing client check-in messages" on page 62: Ce Check-in allows you to compose a message to a client that displays on their screen the next time they check in.

Use automated notifications and reminders

- "Using automated client notifications" on page 71: If your agency enabled the notifications feature, Ce Check-in will automatically notify clients when a check-in is coming due, when they've missed a check-in, and when their reporting schedule has changed or ended.

Next step

You'll continue monitoring the client's check-ins and compliance in Ce Check-in until the client is no longer eligible or required to report. Proceed to "Step 5: Disable client's reporting schedule" on page 31.

Step 5: Disable client's reporting schedule

When the client is no longer eligible or required to report, you'll disable their reporting schedule in Ce Check-in. Closing the client's active case(s) in Caseload Explorer automatically disables the client's reporting schedule in Ce Check-in.

Note: You can still view a client's check-in history after their reporting schedule is disabled.

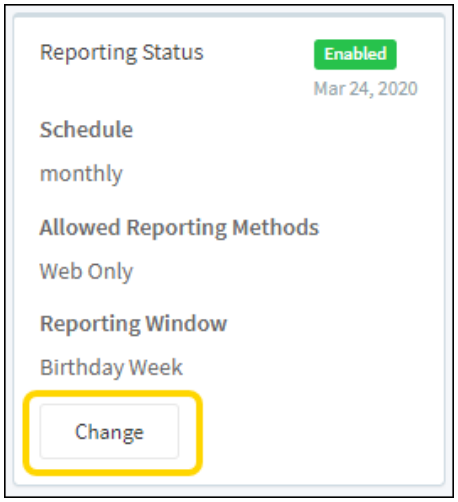
When clients are no longer eligible to report

You may determine a client is no longer eligible to use Ce Check-in to report if they regularly miss check-ins, demonstrate non-compliance with their reporting schedule, or other reason. When a client is no longer eligible, you'll disable their reporting schedule.

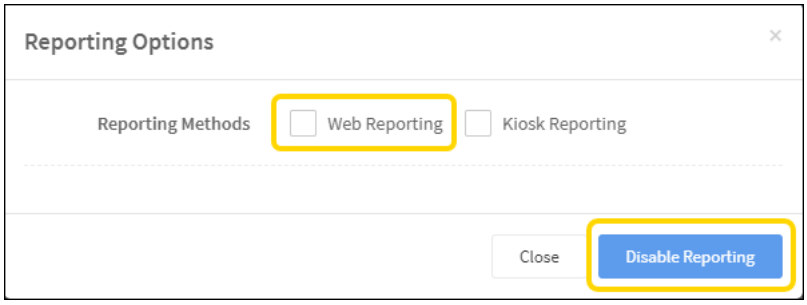
1. Open the ***Client Overview*** page for the client.

   Tip: Search for the client from the toolbar to find them quickly.

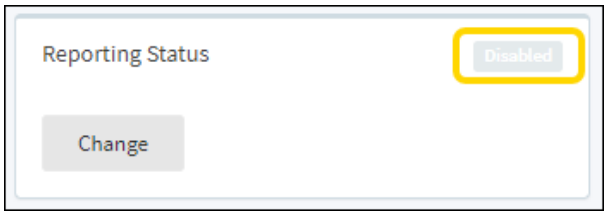
2. In the **Reporting Status** section, click **Change**.

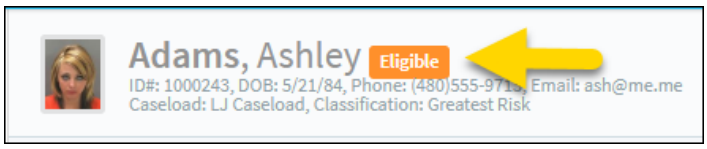


3. Clear the **Web Reporting** check box and click **Disable Reporting**.



Result: The **Reporting Status** section shows **Disabled** and the client's reporting eligibility status switches from **Active** to **Eligible**. The client will receive a notification letting them know they are no longer required to report (if your agency enabled the notifications feature).

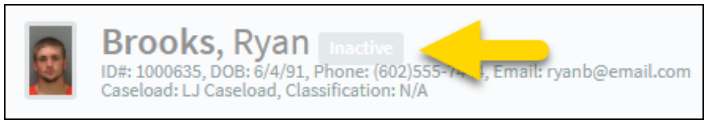




Note: If you later decide to reinstate a client's reporting schedule, ensure they still meet the eligibility requirements, then follow the steps in "Step 2: Assign reporting schedule" on page 17.

When clients are no longer required to report

When clients are no longer on probation or required to report, you'll close their case(s) in Caseload Explorer. When the client's last active supervision case and case folder are closed, Ce Check-in automatically disables the client's reporting schedule. The client's reporting eligibility status switches from **Active** to **Inactive**.



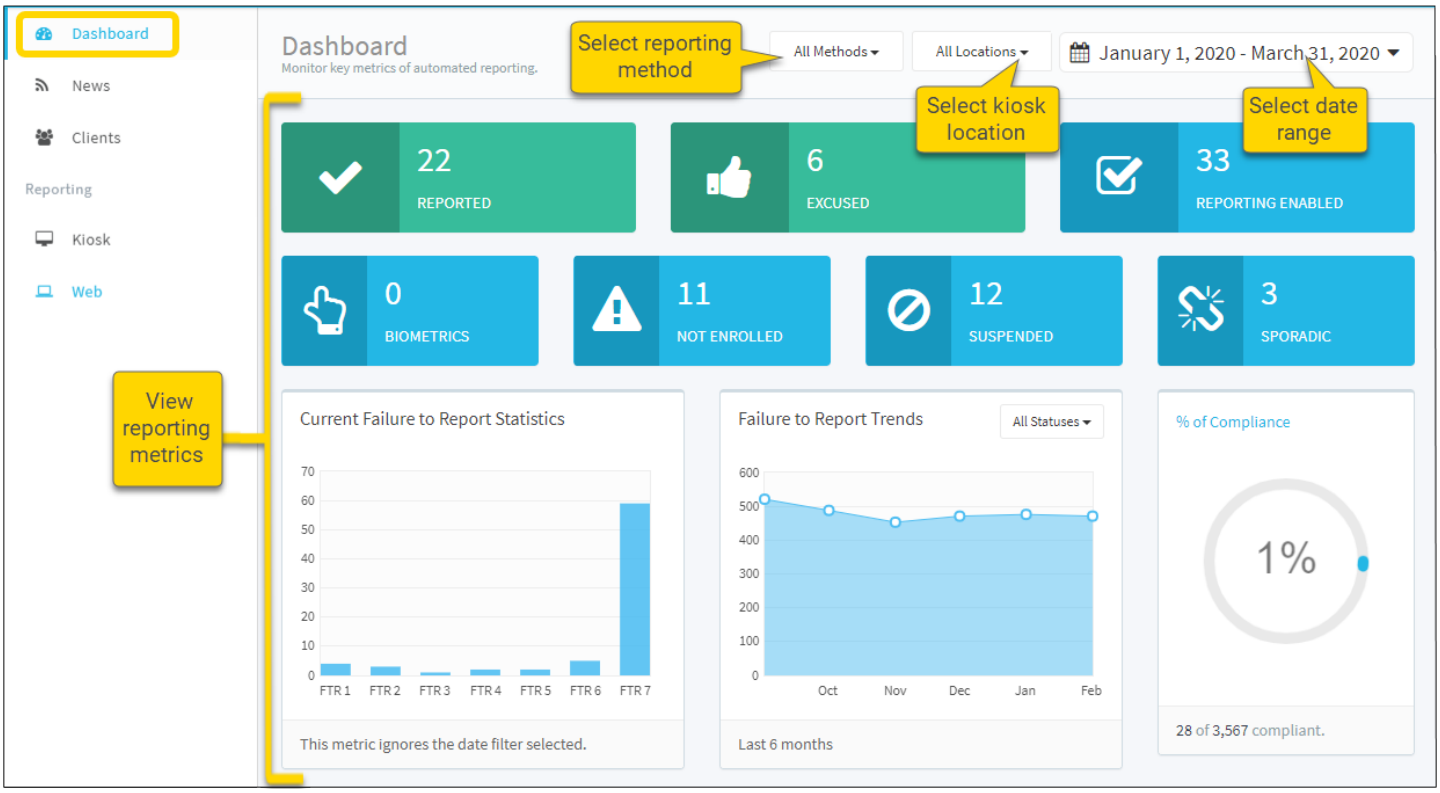
The client will receive a notification letting them know they are no longer required to report (if your agency enabled the notifications feature).

General help topics

The rest of this guide contains help topics that provide you with detailed steps and best practices for getting the most out of Ce Check-in.

About the *Dashboard* and metrics

The ***Dashboard*** displays key reporting metrics that update in real time. Access the ***Dashboard*** each time you sign in to Ce Check-in or click on **Dashboard** from the left menu.



Metrics charts and tabular data

The ***Dashboard*** displays the following metrics charts:

Dashboard **Metrics Charts**

Chart Title	Description	Notes
Reported	Displays the number of completed check-ins.	
Excused	Displays the number of excused check-ins.	See "Excusing check-ins" on page 54.
Reporting Enabled	Displays the number of times reporting was enabled for clients.	Clients may appear in the tabular data list more than once if their reporting was enabled, then disabled, then enabled again, or if their reporting was enabled for more than one reporting method.
Biometrics	Displays the number of clients whose biometric reading was captured during enrollment at a kiosk.	This metric populates data for Ce Check-in Kiosk only.
Not Enrolled	Displays the number of clients who are assigned to kiosk reporting, but have not completed biometric enrollment.	• This metric populates data for Ce Check-in Kiosk only. • This metric ignores the date filter.

Chart Title	Description	Notes
Suspended	Displays the number of clients whose kiosk access was suspended.	This metric populates data for Ce Check-in Kiosk only.
Sporadic	Displays the number of clients who report sporadically (i.e., have a pattern of not checking-in regularly).	
Current Failure to Report (FTR) Statistics	Displays a bar chart depicting the number of clients in each FTR status[1].	• This metric ignores the date filter. • You can filter the tabular data by FTR status[1].
Failure to Report Trends	Displays a line graph depicting the trend in the number of FTRs over the last 6 months of the selected date range.	You can filter the tabular data by FTR status[1].
% of Compliance	Displays a graph depicting the percentage of compliant check-ins, i.e., the number of check-ins completed out of the number required.	This metric does not provide a tabular data.
Reporting Trends	Displays a line graph depicting the trend in the number of completed check-ins over time.	• You can view daily, weekly, or monthly trends. • You can filter the tabular data by reporting method, kiosk location, check-in status[2], day of the week, and time of day.
Reports by Time of Day	Displays a bar chart depicting the number of completed check-ins by time of day, e.g., before 9am, between 9am-10am, etc.	You can filter the tabular data by reporting method, kiosk location, check-in status[2], day of the week, and time of day.
Reports by Day of Week	Displays a bar chart depicting the number of completed check-ins by day of the week, e.g., Monday, Tuesday, etc.	You can filter the tabular data by reporting method, kiosk location, check-in status[2], day of the week, and time of day.
Alerts by Type	Displays a bar chart depicting the number of alerts[3] that occurred during client check-ins at a kiosk. Resolved alerts are shown in blue and unresolved alerts are shown in red.	This metric populates data for Ce Check-in Kiosk only.

[1]*FTR status* refers to the number of consecutive check-ins a client has missed. If a client has a status of **FTR1**, it means the client missed one check-in, if they have a status of **FTR2**, they've missed two consecutive check-ins, and so on. The highest status is **FTR7**, which means the client missed seven *or more* consecutive check-ins.

[2]*Check-in status* refers to whether the check-in was started, abandoned, or completed. **Started** means the check-in is currently ongoing (active), **Abandoned** means the check-in was started but not completed within the allowed time, and **Completed** means the check-in was completed successfully within the allowed time.

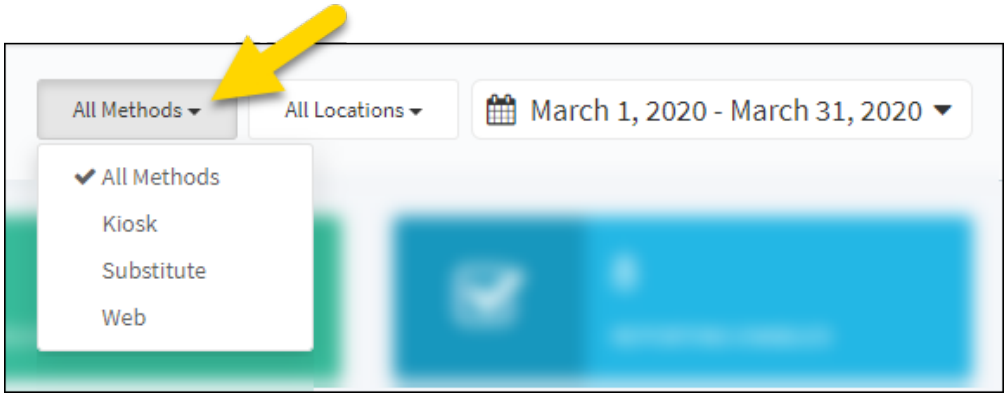
[3]An *alert* is a notification that immediate staff member action is required in response to a particular piece of information obtained from the client during a kiosk check-in.

Filtering metrics charts on the *Dashboard*

You can apply filters to display the metrics for a particular reporting method, kiosk location, and/or date range.

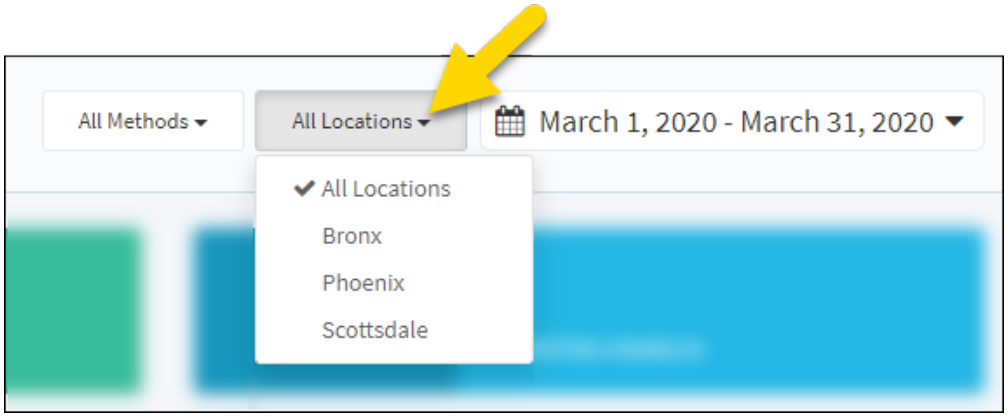
Filter by reporting method

If your agency uses both Ce Check-in Web and Kiosk, you can apply a reporting method filter to show only Web data or only Kiosk data. You can also apply a filter to show only data for substitute check-ins (see "Completing substitute check-ins" on page 56 to learn more). Click the down arrow in the **Methods** menu and select the reporting method data to view.



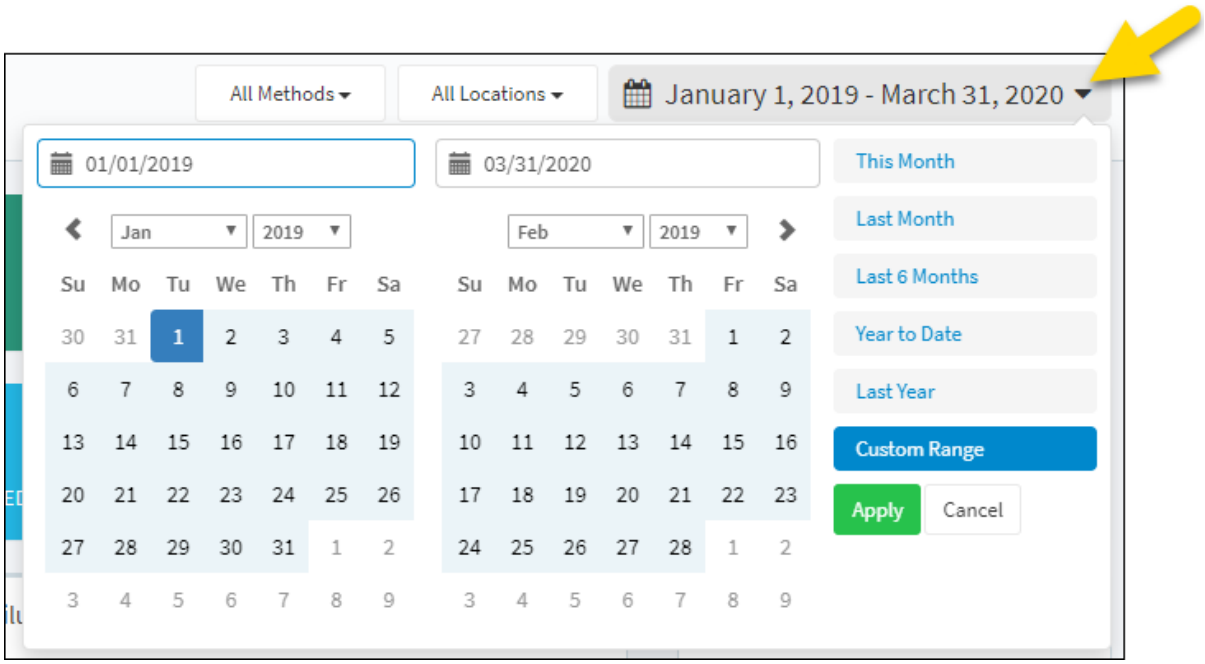
Filter by kiosk location

If your agency uses Ce Check-in Kiosk, you can apply a location filter to show only the data for a particular kiosk. Click the down arrow in the **Locations** menu and select the kiosk's location to view the reporting data for that kiosk.



Filter by date range

You can apply a date range filter to show only the data generated between specific dates. Click the down arrow next to the currently selected date range. Select a different range from the list, or click **Custom Range** and select specific start and end dates. Click **Apply** to apply a custom range.

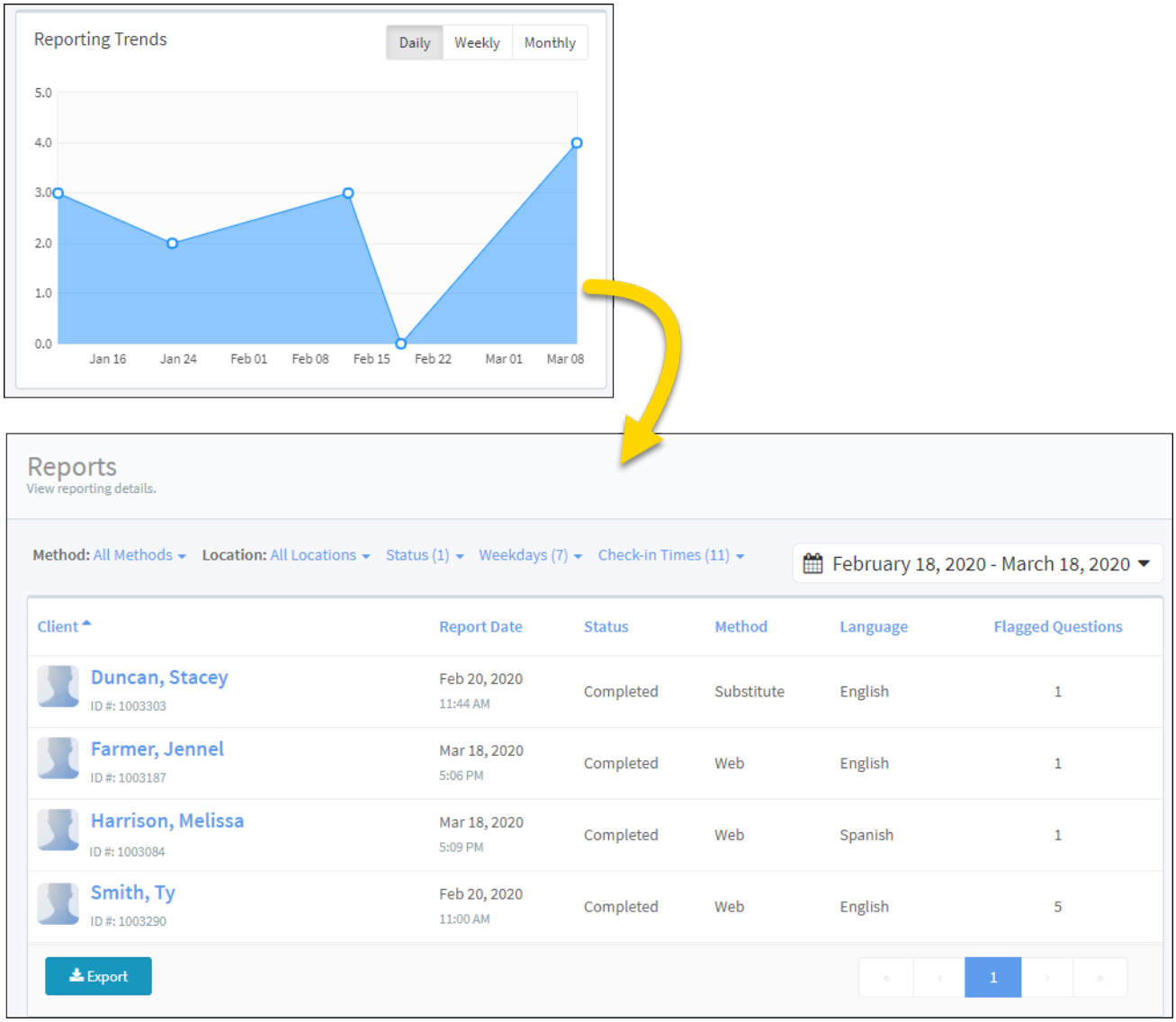


> **Tip:** To apply the date filter to all metrics charts, select the desired date range when you're on the ***Dashboard***. If you click on a chart first and then apply the date filter, it will apply to that selected chart only.

> **Note:** Some metrics charts ignore the date filter and will not change the data displayed when you change the date range. See the **Notes** column in the Dashboard Metrics Charts table above.

Viewing tabular data

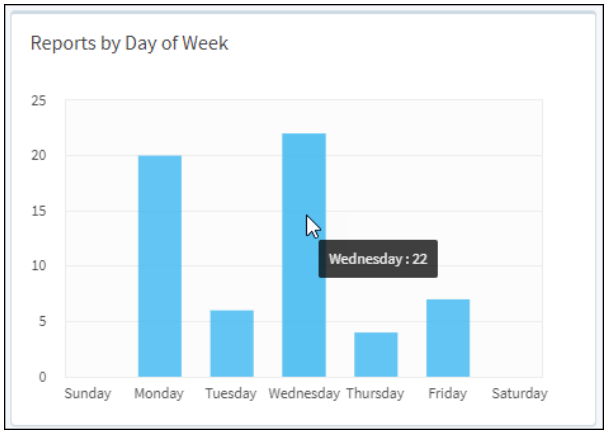
Most of the metric charts represent tabular data sets, which display a list view of the clients that are populating a specific metric.



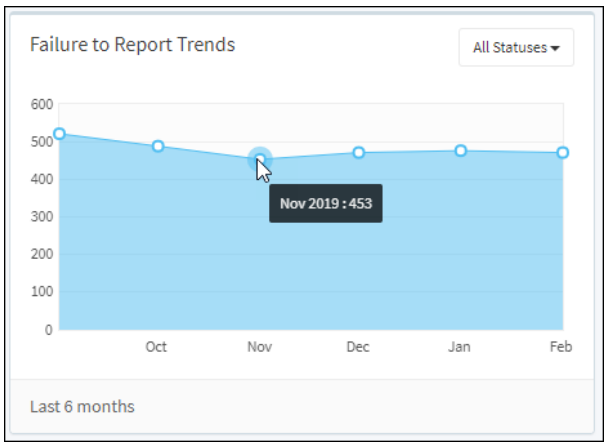
To access the tabular data for a metric chart, do one of the following, depending on the chart type:

- Click directly on the number in a chart

- Click on an individual bar in a bar chart

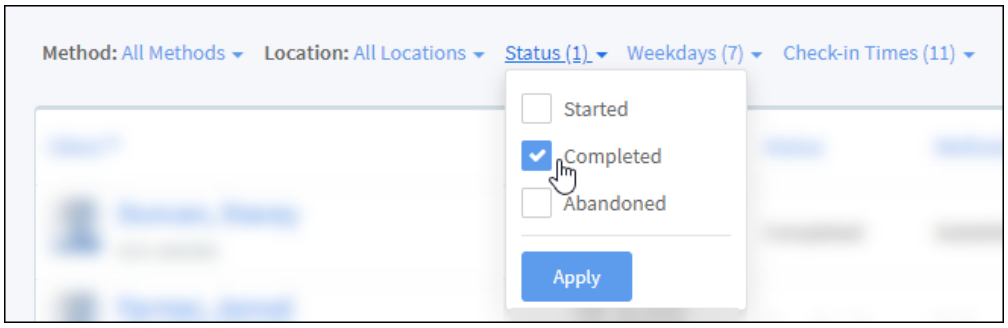


- Click on a marker in a line graph

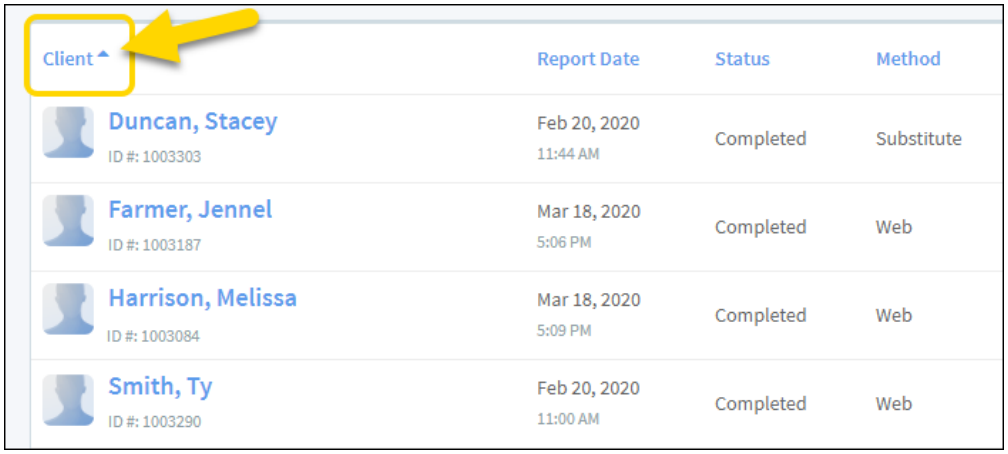


Sorting and filtering tabular data

In addition to providing ***Dashboard*** filters, Ce Check-in allows you to further filter the tabular data for certain metrics (see the **Notes** column in the Dashboard Metrics Charts table above). To apply a filter to tabular data, click the down arrow next to the filter name and select from the options, then click **Apply**.



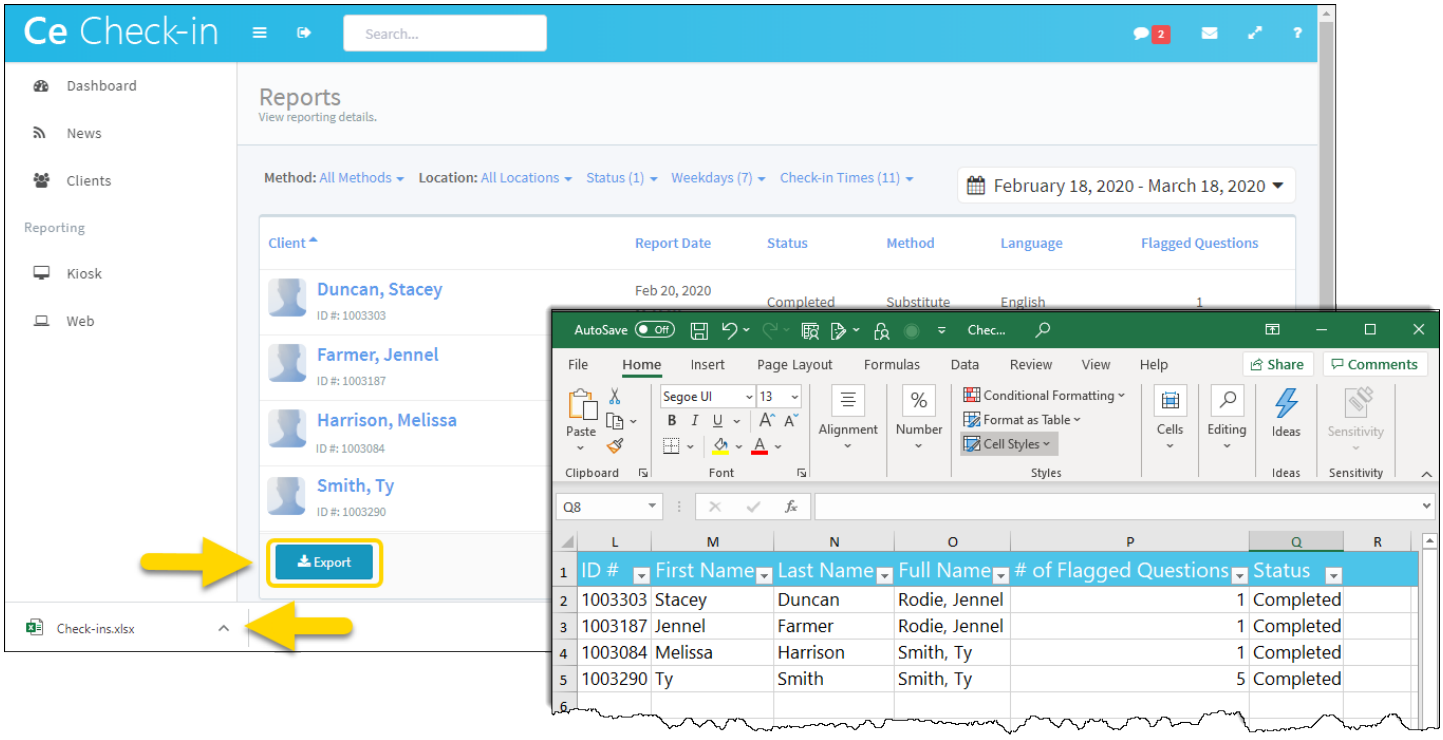
You can also sort the tabular data by column. Click on a column header to sort the tabular data by that column.



Exporting tabular data

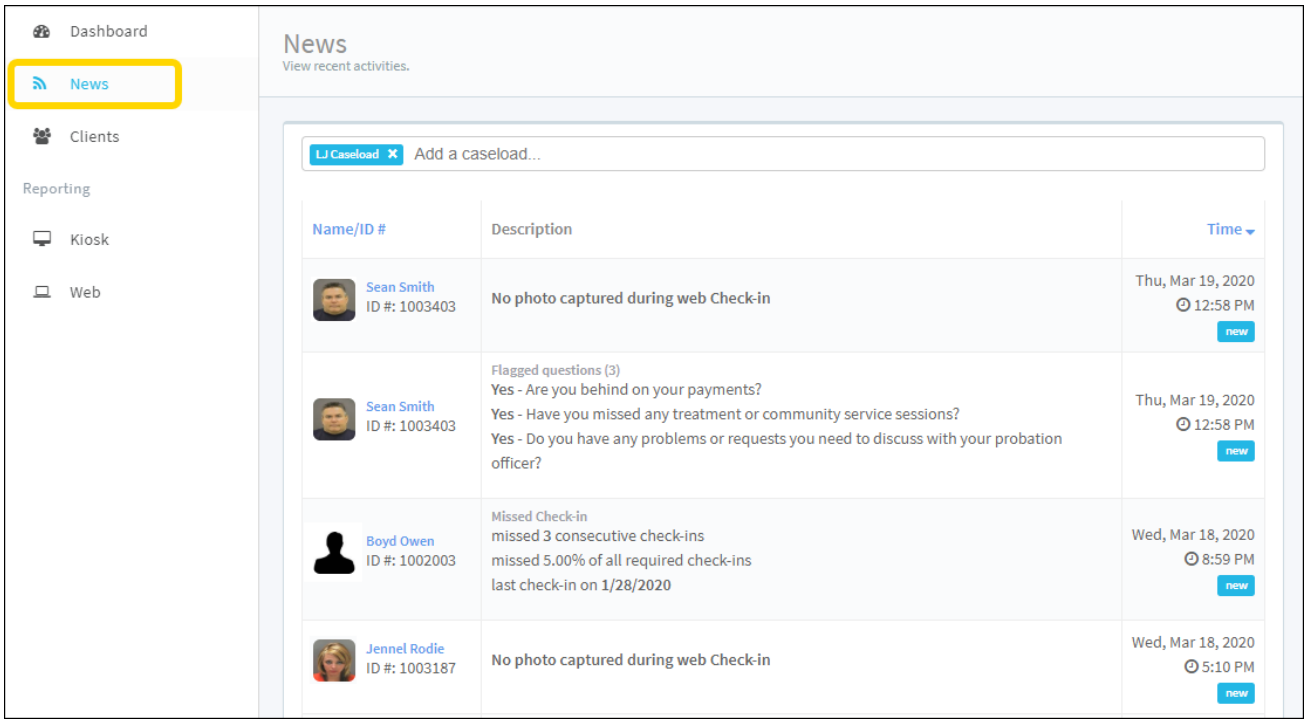
You can export the tabular data to a Microsoft Excel (.xlsx) file for your records. The data shown in the Excel file will reflect any filters or sorting you applied to the tabular data in Ce Check-in.

To export tabular data, click the **Export** button at the bottom of the data table. The system downloads the Excel file to your computer. Open the downloaded file from your browser window or wherever downloaded files are saved.



About the *News Feed*

The ***News Feed*** displays important events regarding the clients you supervise so that you can take any necessary follow-up action. To access the ***News Feed***, click **News** from the left menu.

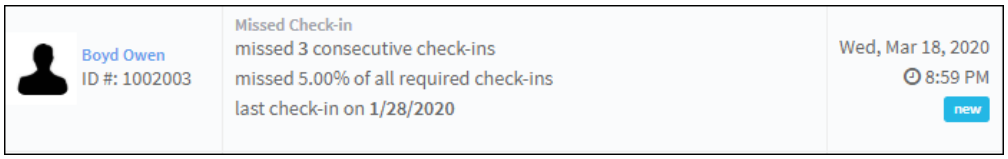


Types of events in the *News Feed*

The ***News Feed*** categorizes events by type and includes missed check-ins, check-ins completed without a photo capture, and clients' answers to flagged check-in questions.

Missed check-in events

Whenever a client misses a required check-in, a **Missed Check-in** event displays in the ***News Feed***. The event includes the number of consecutive missed check-ins and the percentage of all check-ins missed since the client's enrollment in Ce Check-in. If the client completed a check-in prior to the recent missed check-in, the date of the last check-in is displayed. See "About missed check-ins" on page 28 for details on when the system considers a check-in **Missed**.

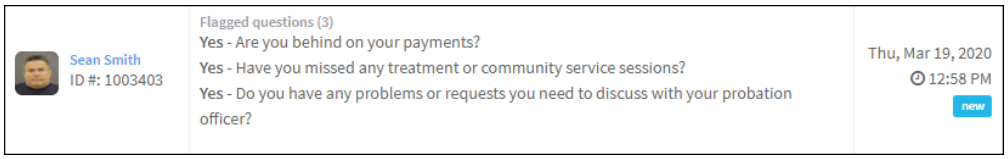


No photo captured events

Whenever a client completes a Web check-in but did not capture a photo of themselves during the check-in, a **No photo captured during web Check-in** event displays in the ***News Feed***. This event notifies you to take any necessary follow-up action with the client, since their identity and presence during the check-in could not be confirmed with a photo.

Flagged questions events

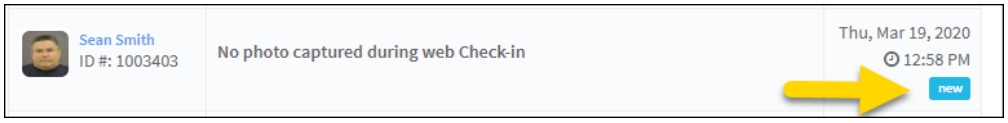
Whenever a client answers a check-in question that is flagged for a *Yes* or *No* answer, a **Flagged questions event** displays in the ***News Feed***. The event lists the flagged questions and the client's answers. This event notifies you to take any necessary follow-up action with the client based on their answers. Your agency determines which questions are flagged.



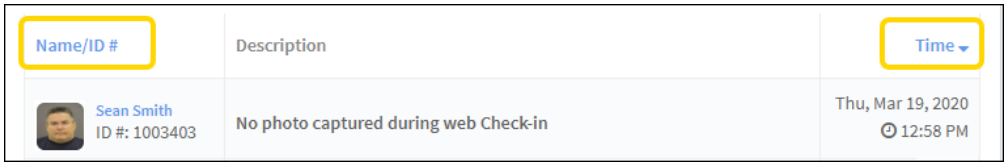
Viewing *News Feed* events for your caseloads

By default, the ***News Feed*** displays events for clients assigned to the caseloads you supervise. Caseload assignments are either carried over from Caseload Explorer automatically or configured manually if your agency does not use Caseload Explorer.

Events that occurred since the last time you checked the ***News Feed*** display  under the event date and time.



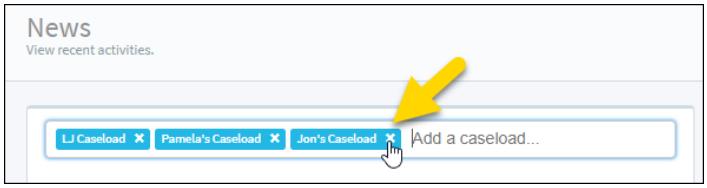
To sort events by client name or event time, click on the **Name/ID #** or **Time** column header.



Viewing *News Feed* events for other caseloads

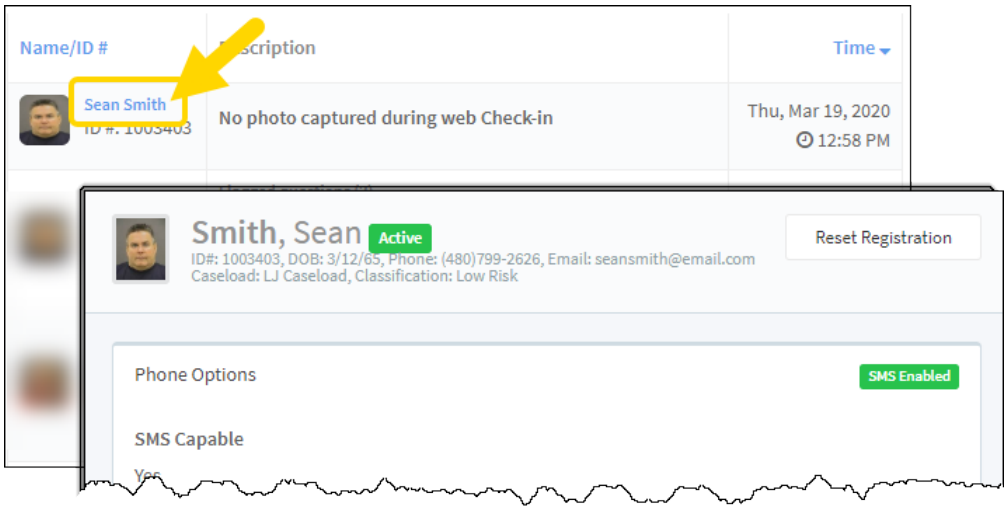
To see events generated for clients in other caseloads, enter a caseload name in the **Add a caseload...** search box at the top of the event list. Select the caseload from the results.

If desired, continue searching for and adding additional caseloads. To remove a caseload from the list, click the ✖ next to the caseload name. To view events for *all* clients in Ce Check-in, regardless of caseload, remove all the caseloads from the list.



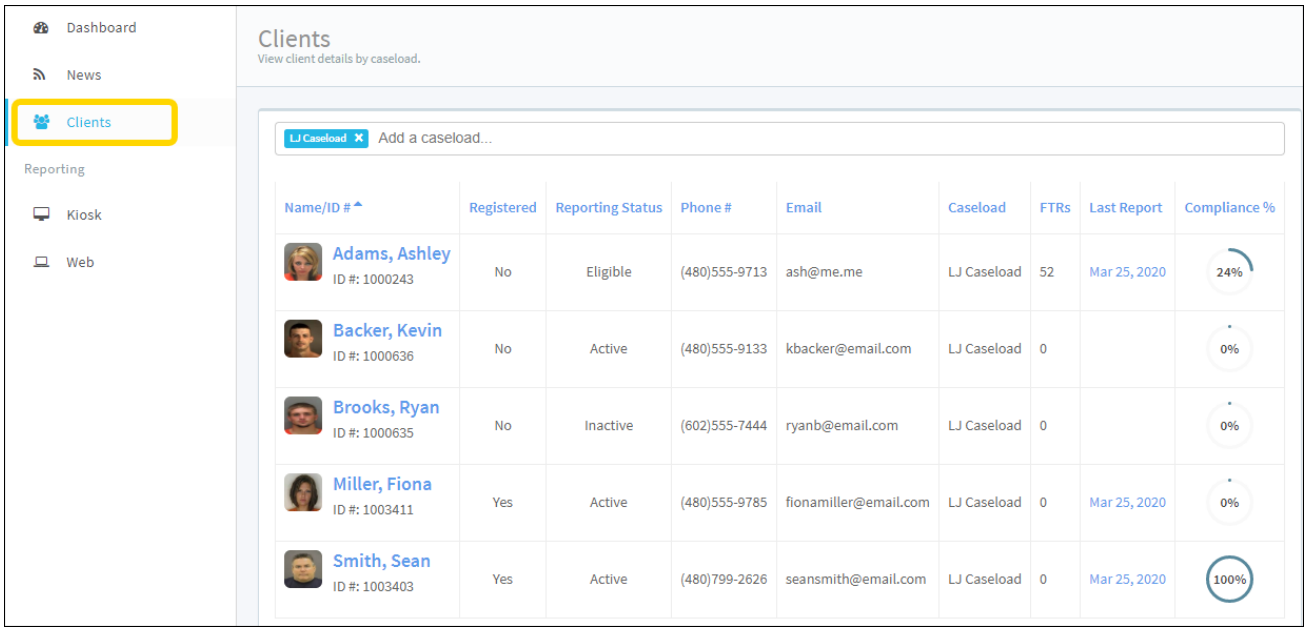
Viewing client details from the *News Feed*

From the ***News Feed***, you can access a client's ***Overview*** page to view their check-ins or manage their reporting eligibility. On an event record, click the client's name to open their ***Client Overview*** page. To learn more, see "About the Client Overview page" on page 47.



About the *Clients* list view

The ***Clients*** list view displays all clients assigned to the caseloads that you or other staff members supervise. To access the ***Clients*** list view, click **Clients** from the left menu.

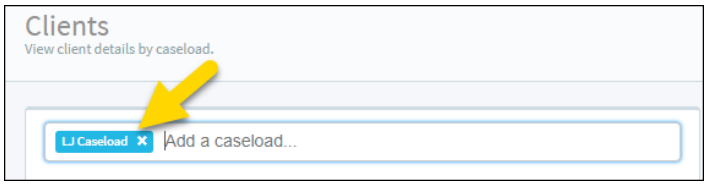


The table includes columns that display the following information for each client:

- **Name/ID#**: Displays the client's name and ID number (PIN from Caseload Explorer).
- **Registered**: Indicates whether the client completed registration for the Ce Check-in client portal.
- **Reporting Status**: Indicates the client's reporting eligibility:
  - **Inactive:** The client is not eligible for reporting because they do not meet the requirements in Caseload Explorer. In this state, you cannot assign them a reporting schedule.
  - **Eligible:** The client is eligible for reporting but does not have an assigned reporting schedule.
  - **Active:** The client is eligible for reporting and has an assigned reporting schedule.
- **Phone #** and **Email**: Displays the phone number and email address on record in Caseload Explorer. To update this information, go to Caseload Explorer.
- **Caseload:** Displays the client's caseload assignment in Caseload Explorer.
- **FTRs:** Displays the client's total number of failures to report.
- **Last Report:** Displays the date of the client's last check-in.
- **Compliance %:** Displays the percentage of the client's completed check-ins out of the total required.

Viewing clients in your caseloads

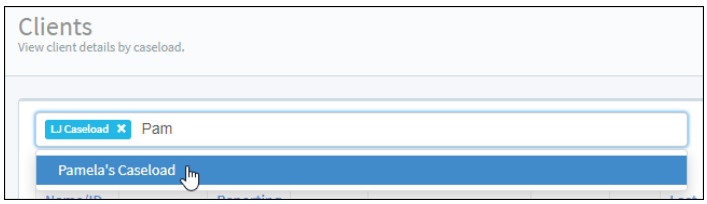
By default, the ***Clients*** list view displays the clients assigned to the caseloads you supervise. Caseload assignments are either carried over from Caseload Explorer automatically or configured manually if your agency does not use Caseload Explorer.



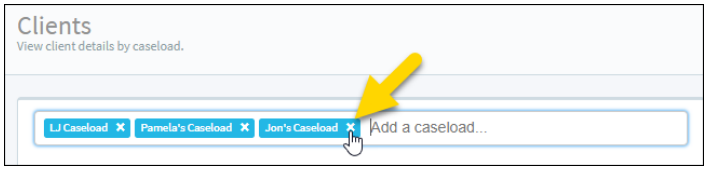
To sort the client list by column, click on any of the column headers.

Viewing clients in other caseloads

To display clients assigned to other caseloads, enter a caseload name in the **Add a caseload...** search box at the top of the client list. Select the caseload from the results.



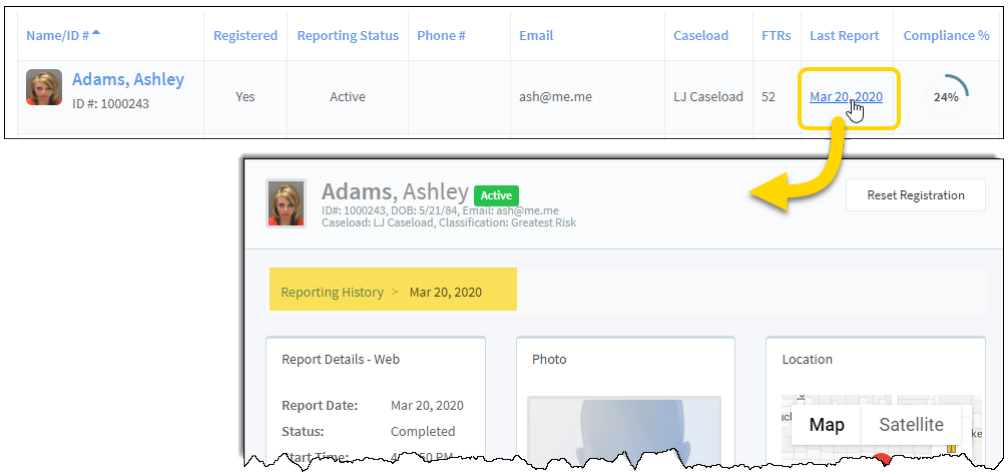
If desired, continue searching for and adding additional caseloads. To remove a caseload from the list, click the ✖ next to the caseload name. To view *all* clients in Ce Check-in, regardless of caseload, remove all the caseloads from the list.



Viewing client details from the *Clients* list view

From the ***Clients*** list view, you can access a client's ***Client Overview*** page to view all of their check-ins or manage their reporting eligibility. Click on a client's name in the list to open their ***Client Overview*** page.

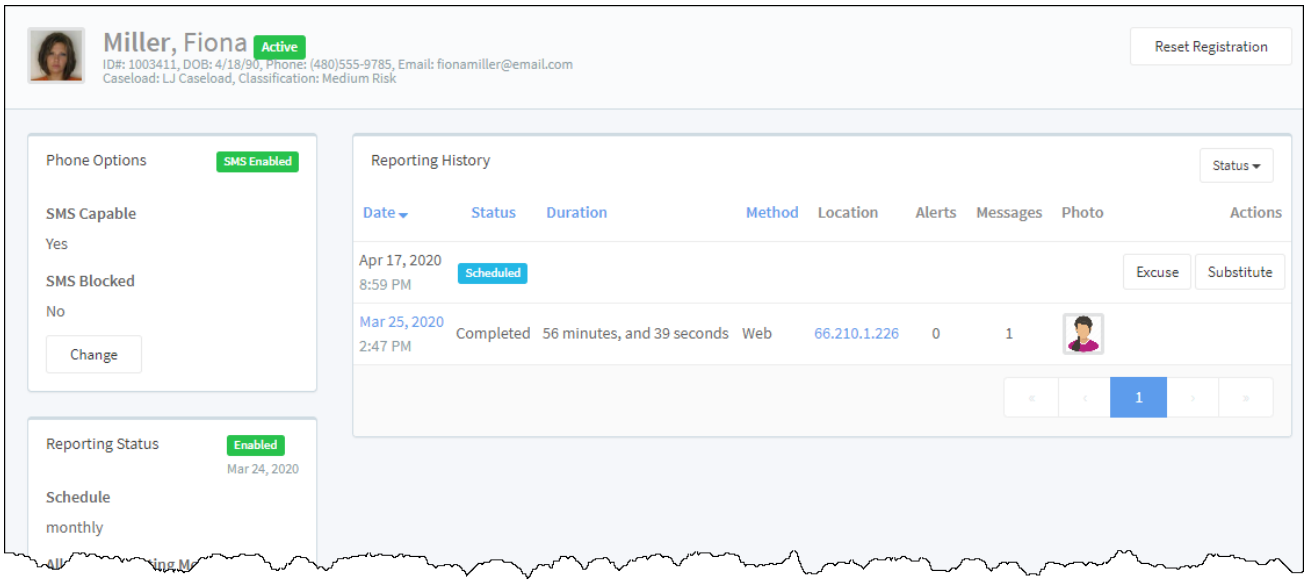
You can also access the details of the client's latest check-in from the ***Clients*** list view. Click the date in the **Last Report** column to view the details for that check-in.



To learn more about the ***Client Overview*** page and reporting history, see "About the Client Overview page" on page 47.

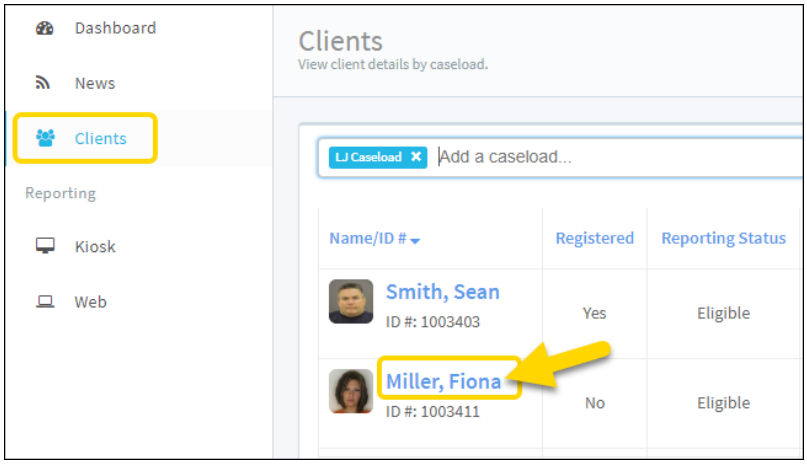
About the *Client Overview* page

From the ***Client Overview*** page, you can review a client's past and scheduled check-ins, view the data captured from completed check-ins, and manage the client's reporting method and schedule.

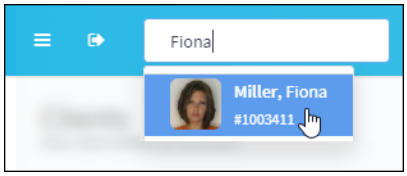


To open the ***Client Overview*** page, do one of the following:

- From the left menu, click **Clients** to open the ***Clients*** list view. Locate the client in the list and click on their name.



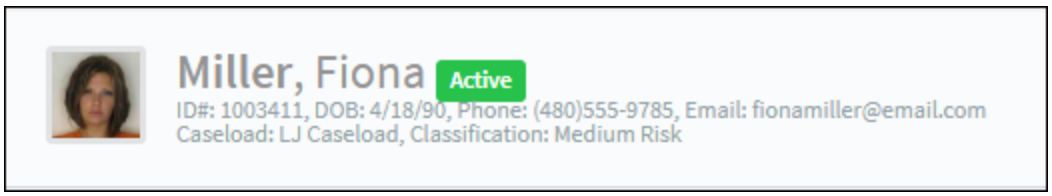
- Search for the client from the toolbar and click on their name.



What's on the *Client Overview* page

The ***Client Overview*** page displays the following sections.

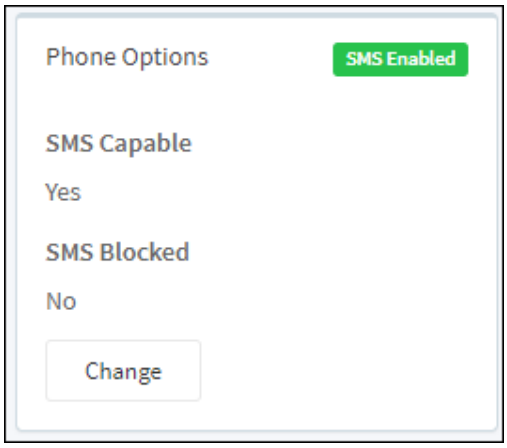
Client summary



The top of the ***Client Overview*** page displays a client summary that includes their ID#, date of birth, contact info, caseload assignmnment, and classification (or supervision level in Caseload Explorer). It also displays one of the following statuses that reflects the client's reporting eligibility:

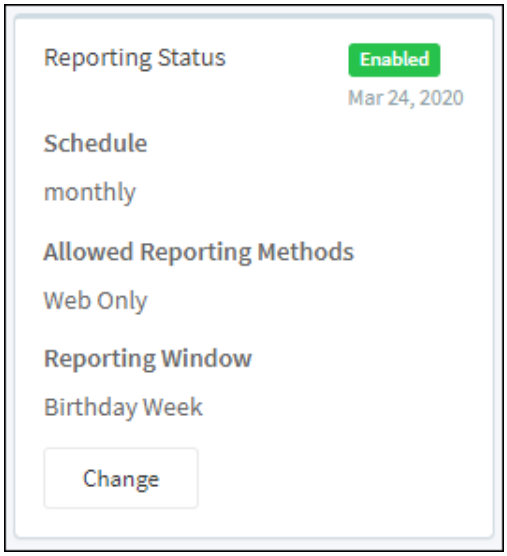
- **Inactive:** The client is not eligible for reporting because they do not meet the requirements in Caseload Explorer. In this state, you cannot assign them a reporting schedule.
- **Eligible:** The client is eligible for reporting but does not have an assigned reporting schedule.
- **Active:** The client is eligible for reporting and has an assigned reporting schedule.

Phone options section



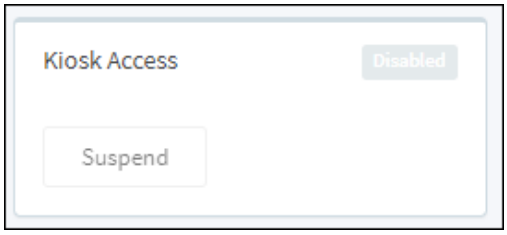
The **Phone Options** section only displays if the client has an active mobile phone number listed in Caseload Explorer. This section indicates whether the mobile phone number is SMS capable (i.e., can receive text messages) and whether the number is blocked from receiving text messages. For more information on text message capabilities, see "Using SMS text message chat" on page 64 and "Using automated client notifications" on page 71.

Reporting Status section



The **Reporting Status** section displays and allows you to configure the client's reporting schedule. It also shows the date of when the reporting schedule was enabled. See "How to assign or modify a client's reporting schedule" on page 18 for more information.

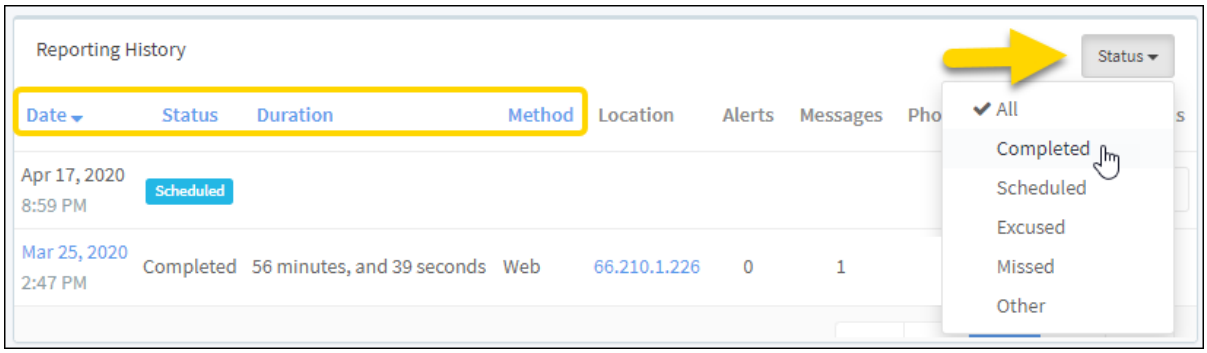
Kiosk Access section



If your agency subscribes to Ce Check-inKiosk, the **Kiosk Access** section indicates whether the client has access to kiosk reporting and allows you to suspend their access if needed.

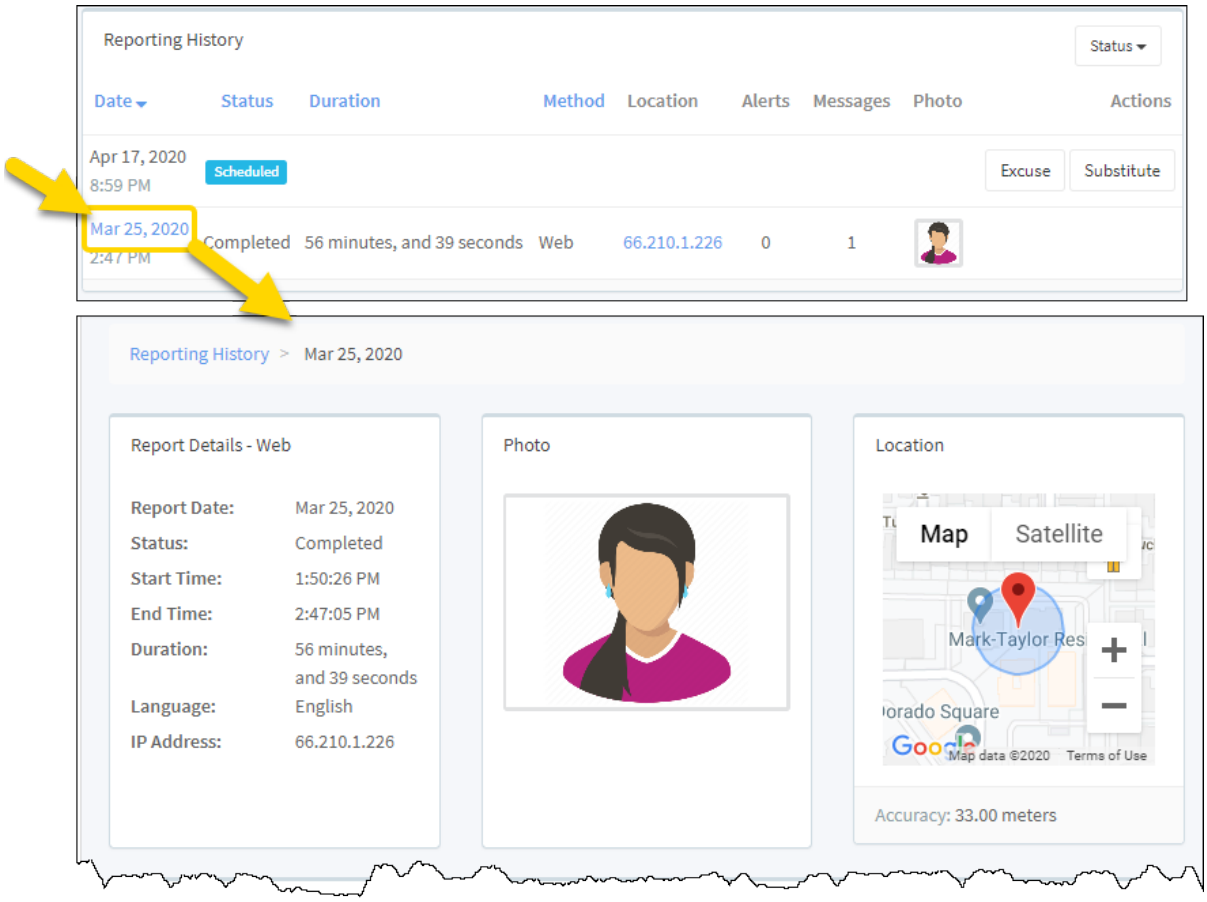
Reporting History section

The **Reporting History** section displays the client's completed, scheduled, excused, missed, and abandoned (started but not completed) check-ins. Click the **Status** drop-down menu at the top right and select an option to display only check-ins with that status. To sort the client list by column, click on any of the blue column headers.



From this section, you can:

- Excuse check-ins or complete substitute check-ins. For more information, see "Excusing check-ins" on page 54 and "Completing substitute check-ins" on page 56.
- View the details of individual completed check-ins. Click on the date of a completed check-in to open its detail page.



Check-in detail page

The check-in detail page displays the following:

- Date, time, and duration of the check-in.
- The client's photo, if they took one during the check-in.
- The client's location during their check-in and location detection accuracy, if the client had enabled GPS/location tracking. See "About GPS/location tracking" on page 61 for more information.
- Any alerts generated during the check-in (applies to kiosk check-ins only).
- The list of check-in questions and the client's answers, including any questions that were flagged for a *Yes* or *No* answer and may need officer follow-up. Your agency determines which questions are flagged.
- Any messages the client read during their check-in. See "Composing client check-in messages" on page 62 for more information.

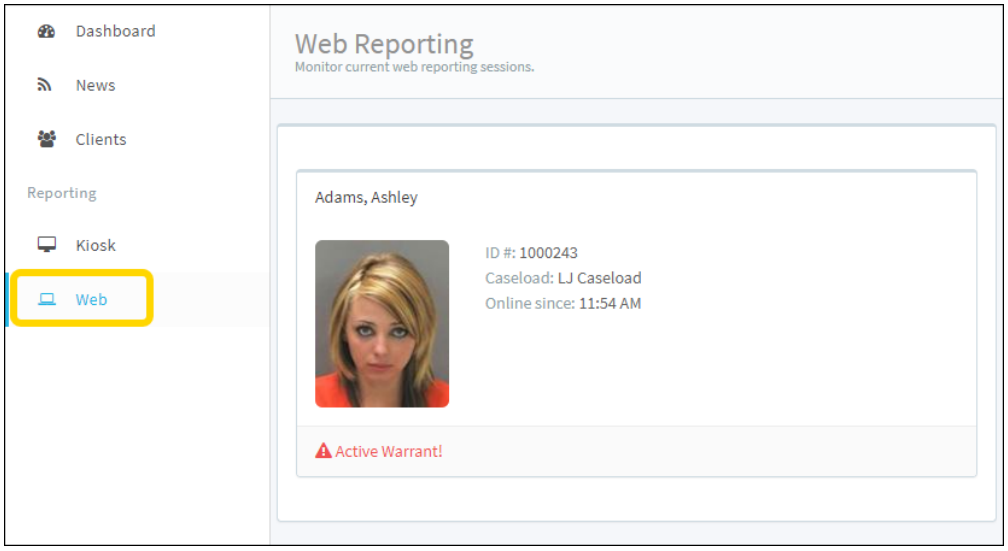
Viewing active check-ins

Ce Check-in allows you to view the active check-ins currently taking place on a web session or at a kiosk.

- For web check-ins, this feature is helpful in the event a client notifies you that they are experiencing technical issues completing their check-in. You can view the list of active check-ins to confirm the client is actually online and actively using the system.
- For kiosk check-ins, you can see which clients are actively using which kiosks. You can also view details of when a kiosk was last accessed for a check-in.

How to view active web check-ins

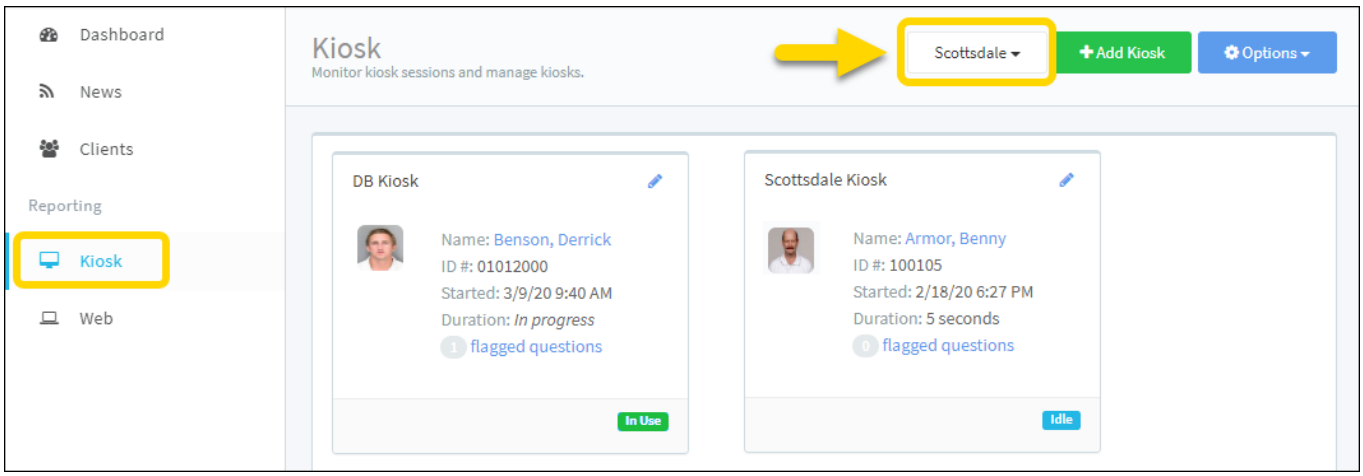
1. From the left menu, click **Web** to open the ***Web Reporting*** page.
2. If a client in your caseload has an active check-in session, their name displays on the ***Web Reporting*** page, along with a timestamp of when they started their session.



How to view active kiosk check-ins and kiosk status

1. From the left menu, click **Kiosk** to open the ***Kiosk*** page.

2. By default, the ***Kiosk*** page displays the kiosks in all of your agency's locations. To select a specific location to view, select it from the menu at the top right.



3. If a kiosk is:
   - Currently in use for an active check-in, the kiosk shows an **In Use** status. The kiosk also displays the name of the client checking in, the date and time they started their check-in, and a **Duration** value of **In progress**.
   - Online but not currently in use for an active check-in, the kiosk shows an **Idle** status. The kiosk also displays the name of the last client who used the kiosk to check in, the date and time they started their check-in, and a **Duration** value that reflects the amount of time they spent checking in.

Excusing check-ins

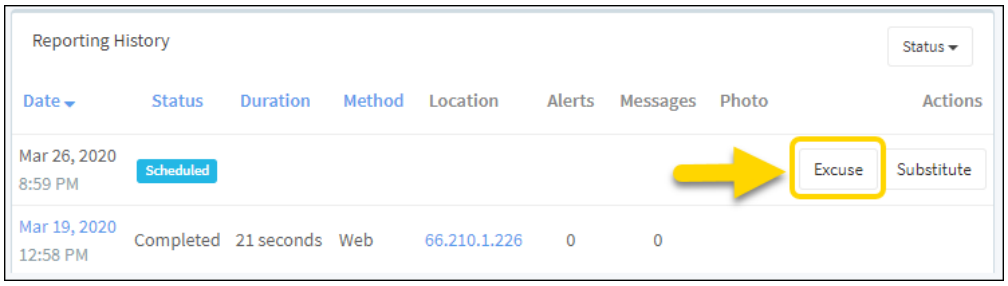
You may wish to *excuse* one or more missed or scheduled check-ins if a client is hospitalized, entering treatment, incarcerated, or experiencing another circumstance that prevents them from checking in. When you excuse a check-in, it is not included in the client's compliance or failure to appear (FTR) calculations. However, it is included in the **Excused** metric on the ***Dashboard***.

> **Note:** In Caseload Explorer, on the ***Events*** page, an excused check-in appears as a missed check-in, but it displays a comment stating "Check-in was excused" and does not trigger a FTR flag.

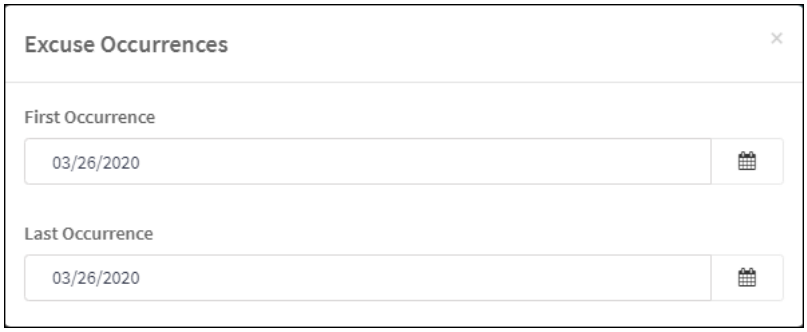
1. Open the ***Client Overview*** page for the client you want to excuse.

   > **Tip:** Search for the client from the toolbar to find them quickly.

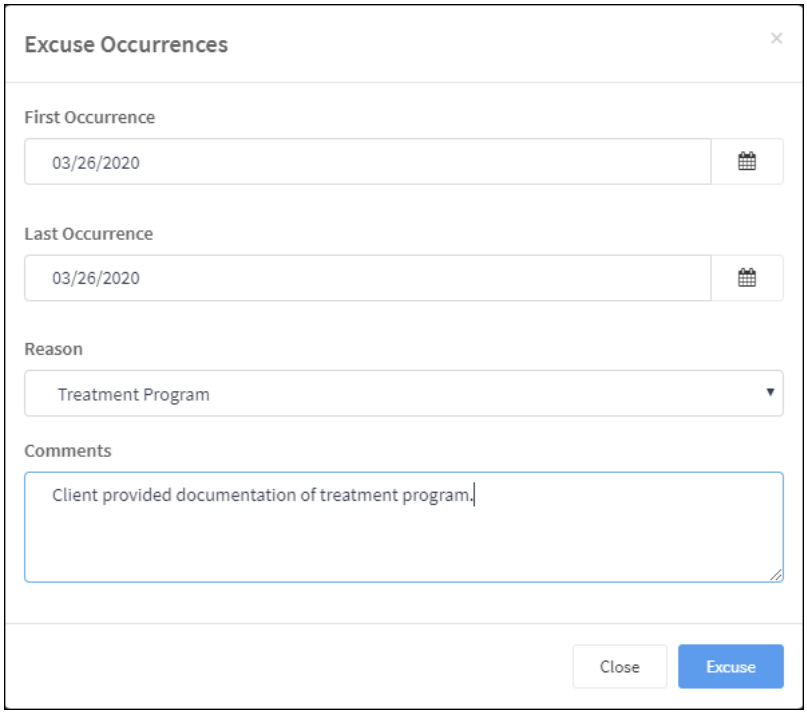
2. In the **Reporting History** section, locate the date of the check-in you want to excuse and click the **Excuse** button to the right.



3. The **Excuse Occurrences** dialog box appears. If you want to excuse just this one check-in, leave the dates shown in the **First Occurrence** and **Last Occurrence** fields as-is. If you want to excuse multiple check-ins, select the applicable dates.

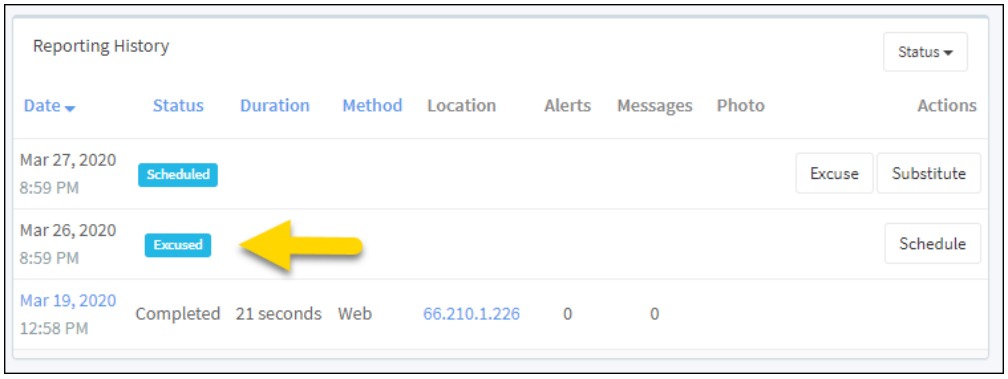


4. From the drop-down menu, select a **Reason** for excusing the check-in.
5. If desired, enter any **Comments** further explaining the excused check-in.
6. Click **Excuse**.



Results:

- In the **Reporting History** section, the check-in displays a status of **Excused**.



- The **Excused** metric on the ***Dashboard*** updates to reflect the excused check-in. See "About the Dashboard and metrics" on page 34 for more information.

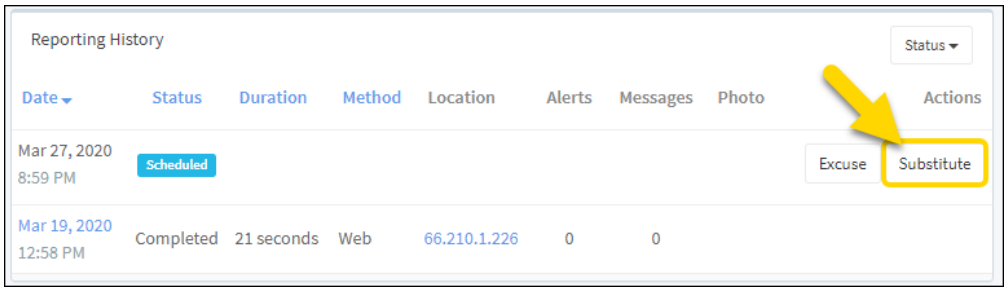
Completing substitute check-ins

If you were recently in contact with a client due an office visit, appearance in court, or other circumstance, you may wish to *substitute* their scheduled check-in so that the client doesn't have to complete it. This means you'll complete a check-in on behalf of the client based on the information you gathered from your recent contact.

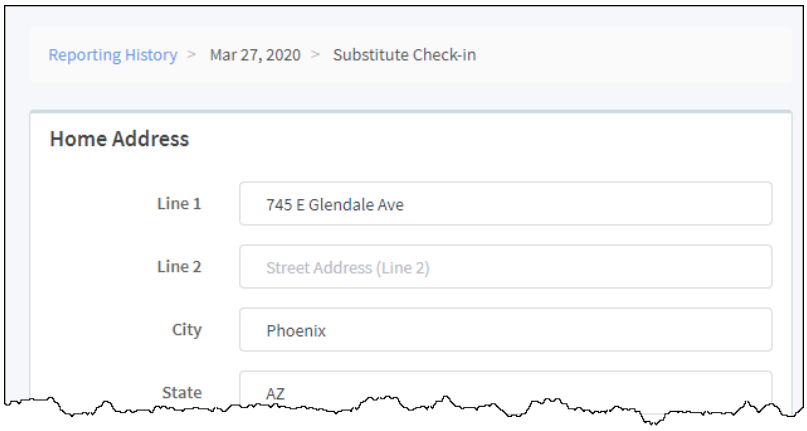
1. Open the ***Client Overview*** page for the desired client.

   > **Tip:** Search for the client from the toolbar to find them quickly.

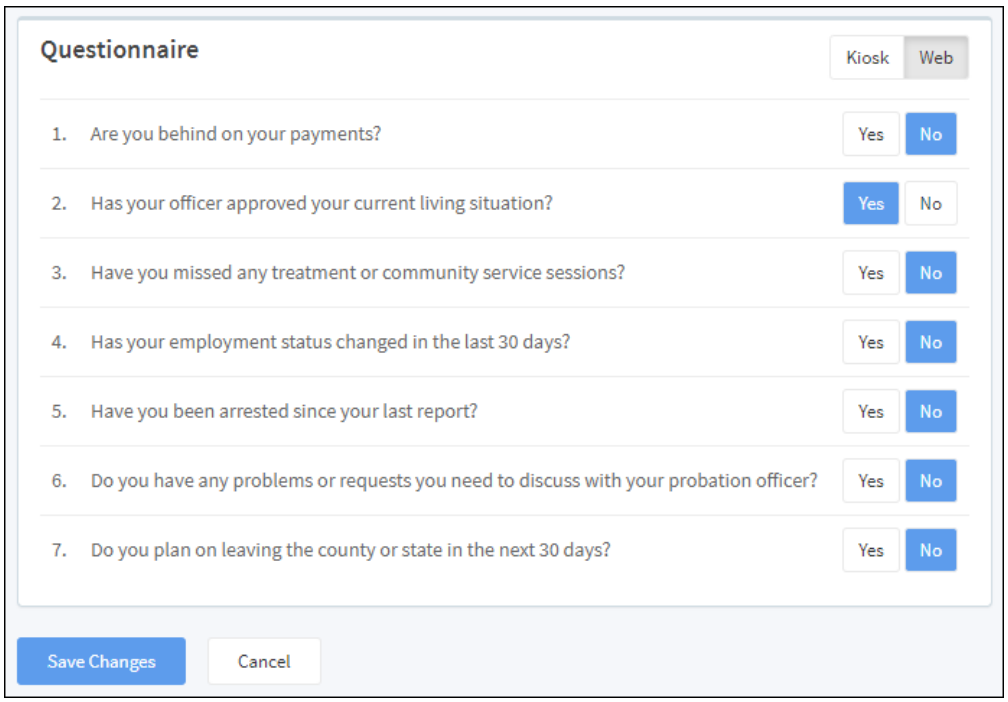
2. In the **Reporting History** table, locate the date of the check-in you want to substitute and click the **Substitute** button to the right.



3. The ***Substitute Check-in*** window appears. The **Home Address**, **Mailing Address**, and **Contact Info** fields are populated with the client's information on record. Update the fields if necessary. Updates you make will sync back to the client's record in Caseload Explorer.

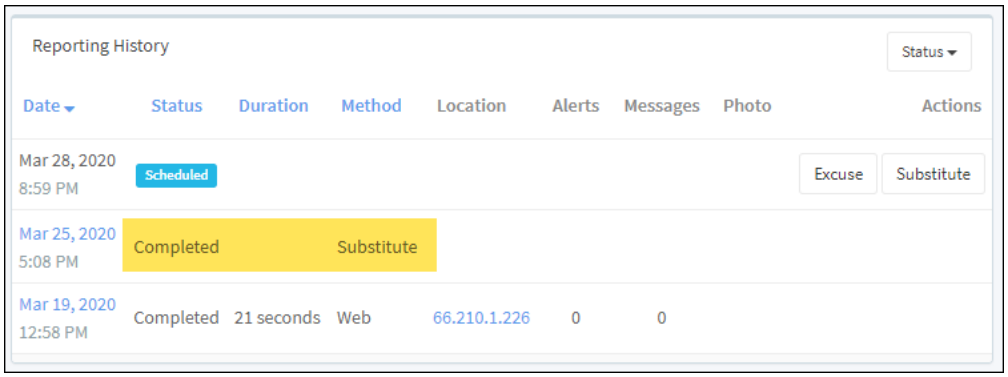


4. In the **Questionnaire** section, select whether you are completing a substitute **Kiosk** check-in or substitute **Web** check-in. Then answer the questions on behalf of the client.



5. When you're done, click **Save Changes** to complete the substitute check-in.

Result: In the **Reporting History** section, the check-in displays a status of **Completed** with a **Substitute** method. Click on the date to view the check-in details.



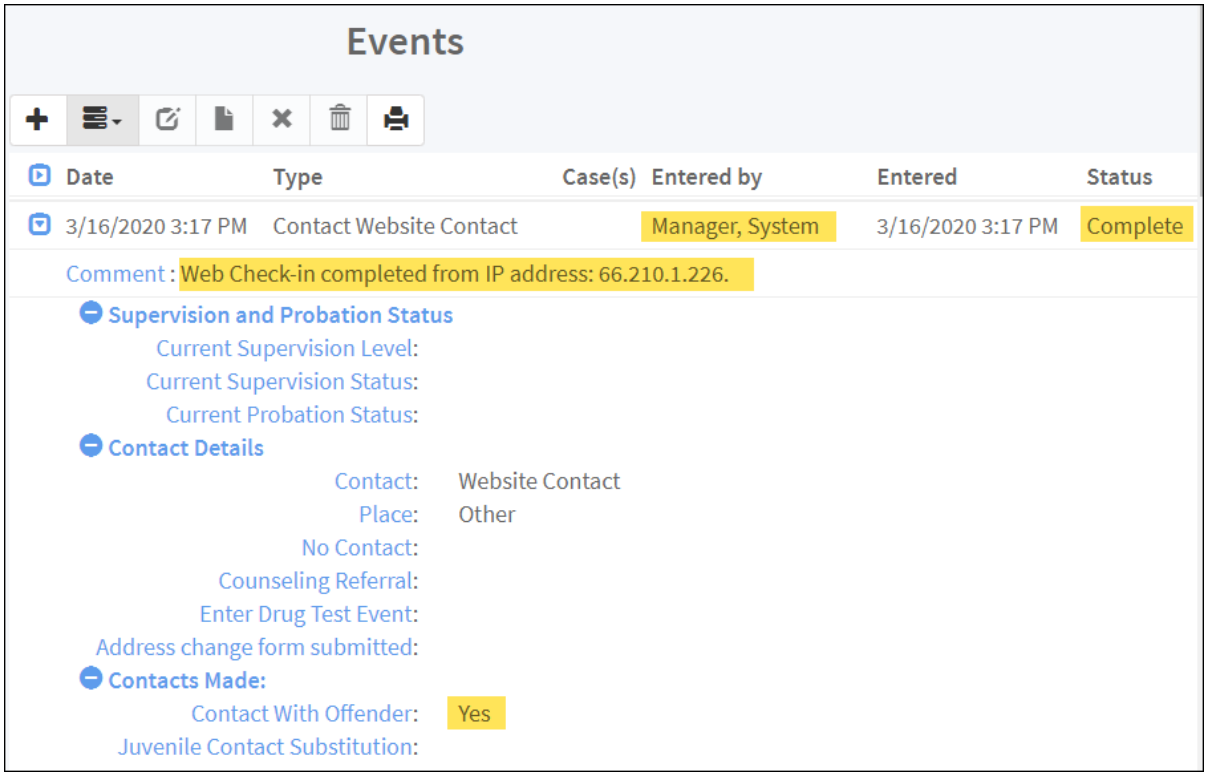
Note: On the ***Dashboard***, you can filter the reporting method by **Substitute** to see data for this and any other substitute check-ins. See "About the Dashboard and metrics" on page 34 for more information.

Viewing check-in records in Caseload Explorer

Records of check-ins in Ce Check-in are automatically populated in Caseload Explorer to reduce duplicate entry and save time. Check-ins are recorded on the ***Events*** page and include all completed, missed, substitute, and excused check-ins.

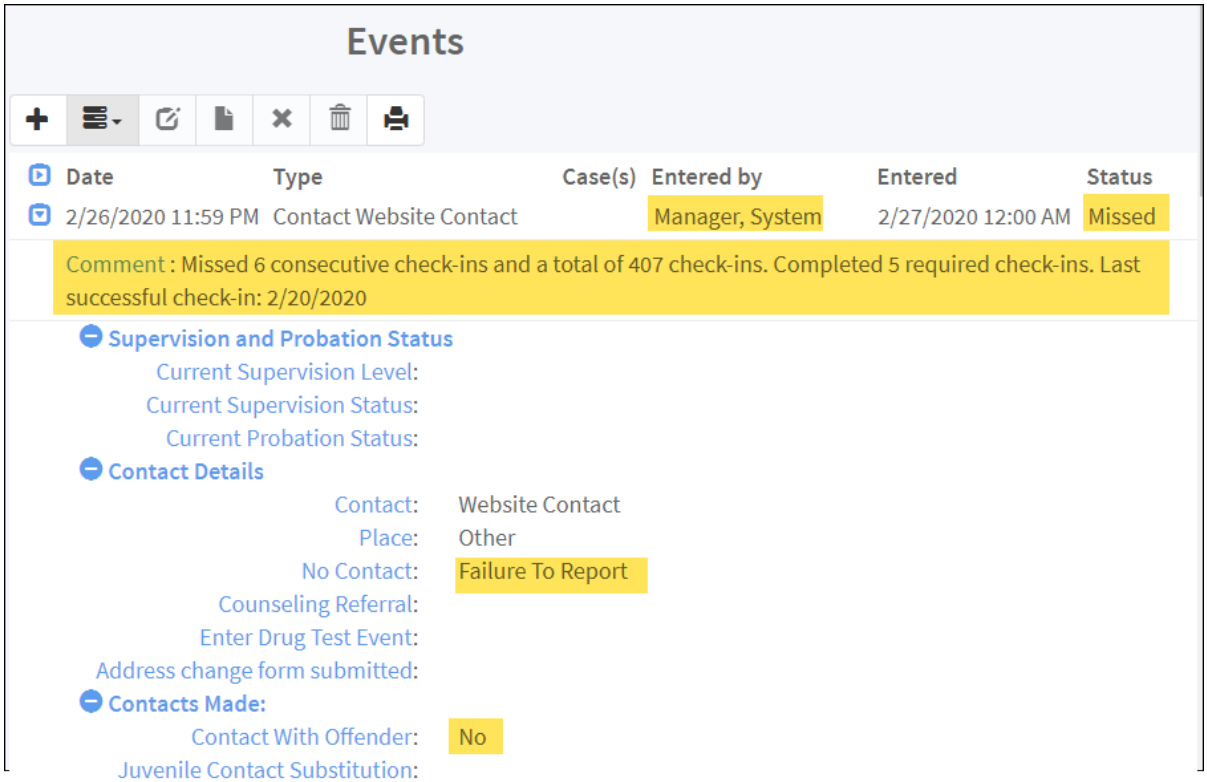
Completed check-ins

Completed check-ins show as entered by **System Manager** with a status of **Complete**. The event comment displays the method of reporting (web or kiosk check-in) and the approximate location of where the check-in occurred (the IP address of the client's check-in device). The event details shows a **Contact With Offender** status of **Yes**.



Missed check-ins

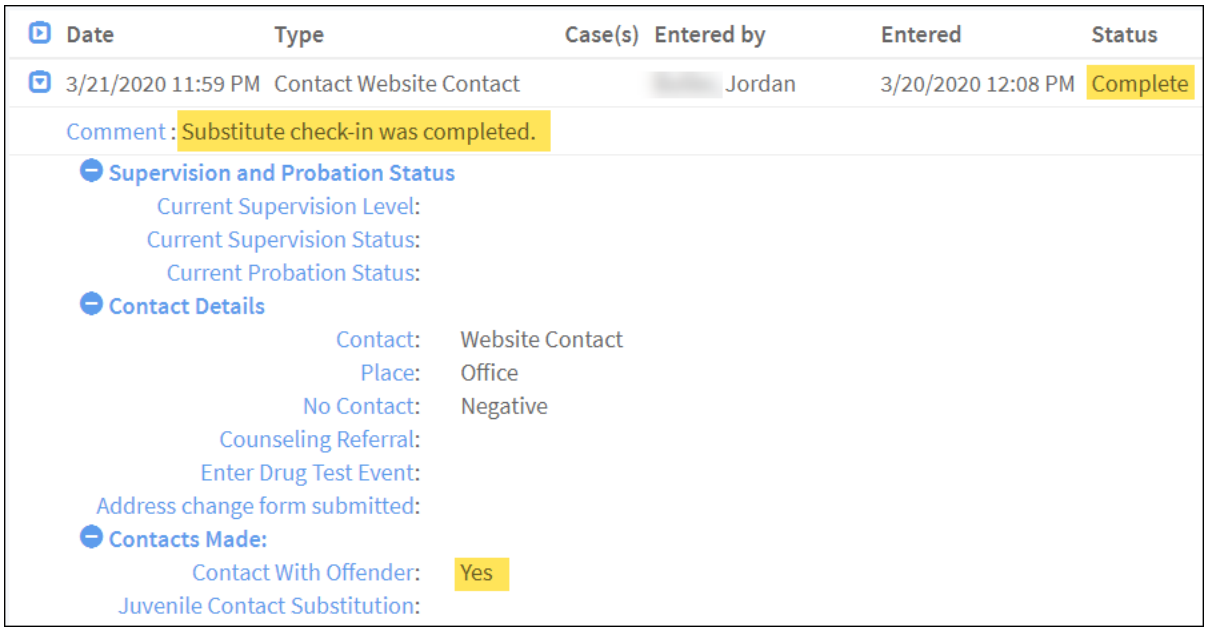
Missed check-ins show as entered by **System Manager** with a status of **Missed**. The event comment details the number of consecutive missed check-ins and the date of the last successful check-in. The event details show a **No Contact** status of **Failure to Report** and a **Contact With Offender** status of **No**.



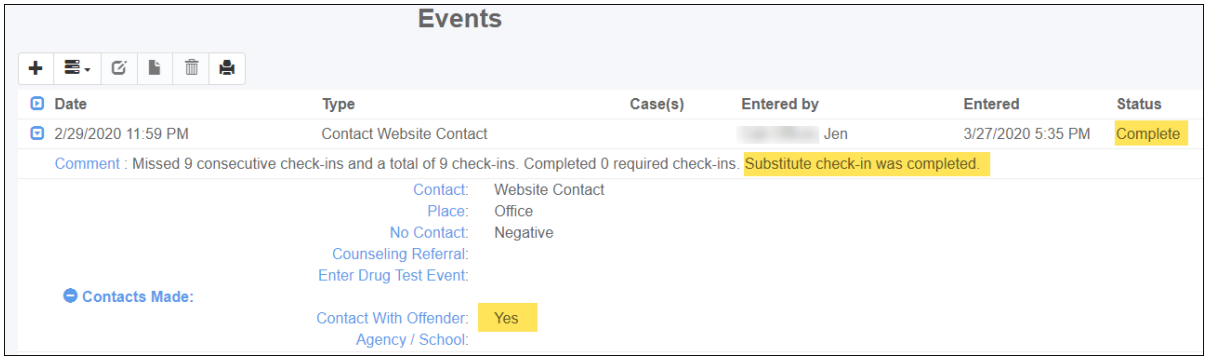
Substitute check-ins

Substitute check-ins show as entered by the user with a status of **Complete**. The event comment indicates whether the substitute check-in was performed on a scheduled check-in or previously missed check-in. The event details shows a **Contact With Offender** status of **Yes**.

Substitute for scheduled check-in:

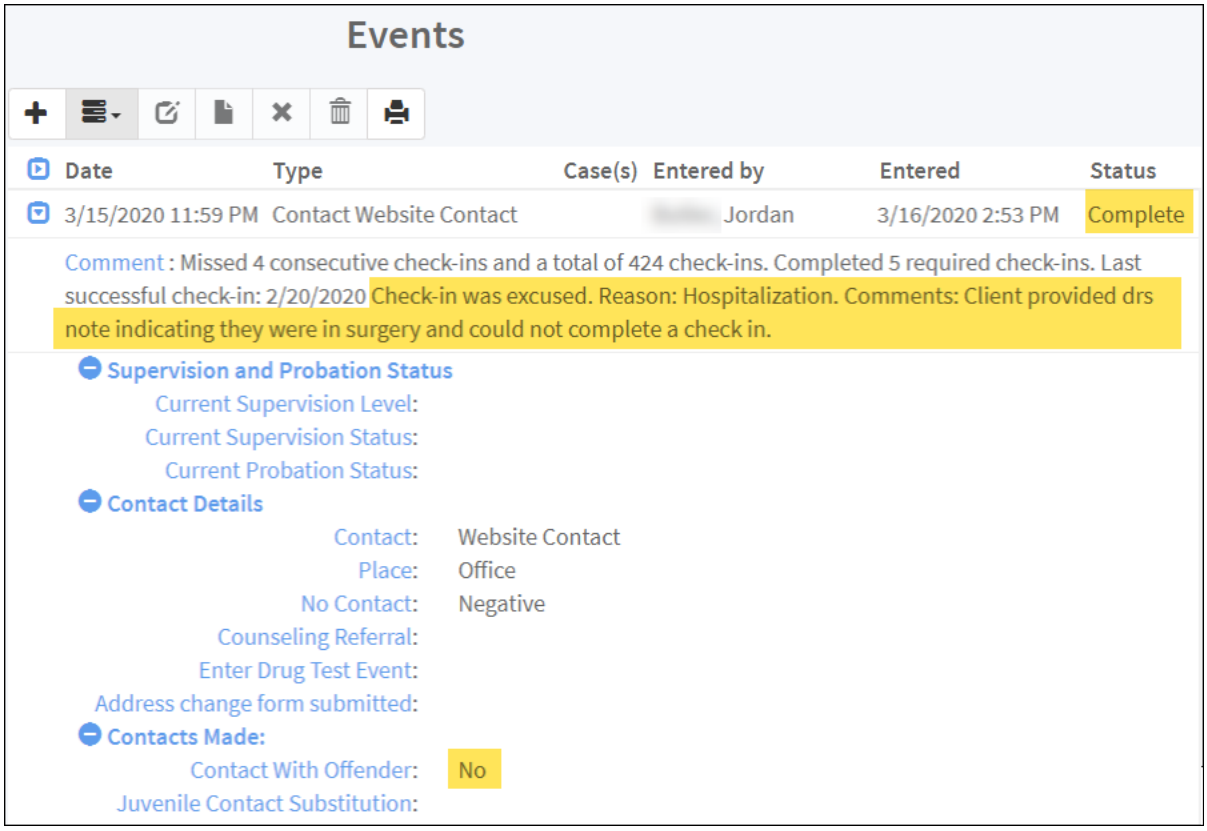


Substitute for previously missed check-in:



Excused check-ins

Excused check-ins show as entered by the user with a status of **Complete**. The event comment indicates the check-in was excused. The event details shows a **Contact With Offender** status of **No**.



About GPS/location tracking

Ce Check-in offers the ability to capture a client's IP address and geographic location during a web check-in. To use this feature, the client must elect to allow their location to be tracked when prompted during each check-in. If the client does not elect to allow tracking, Ce Check-in cannot capture the client's location. For this reason, we recommend your agency requires clients to enable GPS on their devices and allow location tracking when prompted. One way to enforce this requirement is to have clients sign a contract agreeing to allow location tracking.

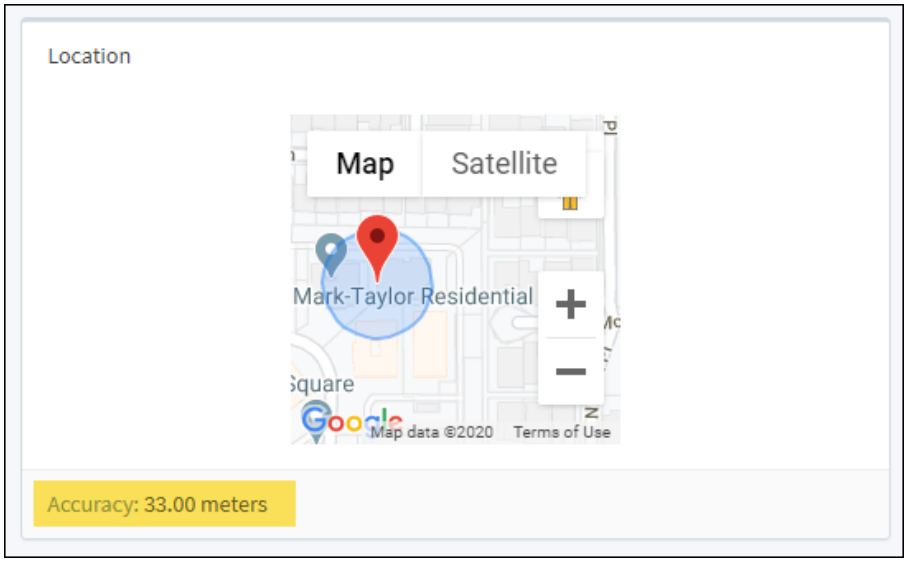
How does location tracking work?

Ce Check-in uses the W3C Geolocation API to retrieve a client's geographical location from their check-in device. The device detects its own location using one of the following technologies, ordered by detection accuracy.

- GPS (most accurate, within a few meters)
- WiFi triangulation
- Cell tower triangulation
- IP-based geolocation (least accurate, within several miles)

Viewing captured location data

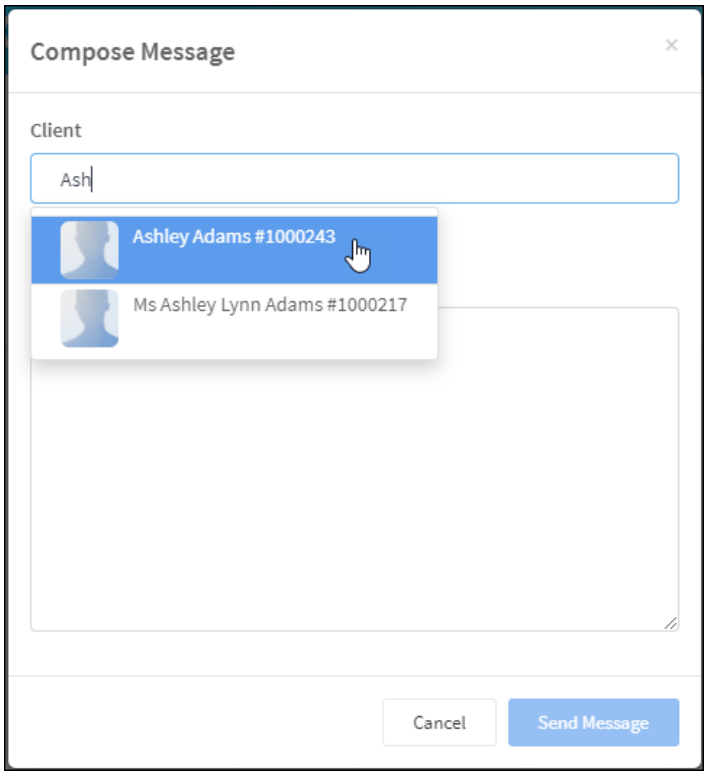
In the client's **Reporting History** for an individual check-in, the **Location** section displays an accuracy rating and a map with a pinpoint representing the latitude and longitude coordinates.



Composing client check-in messages

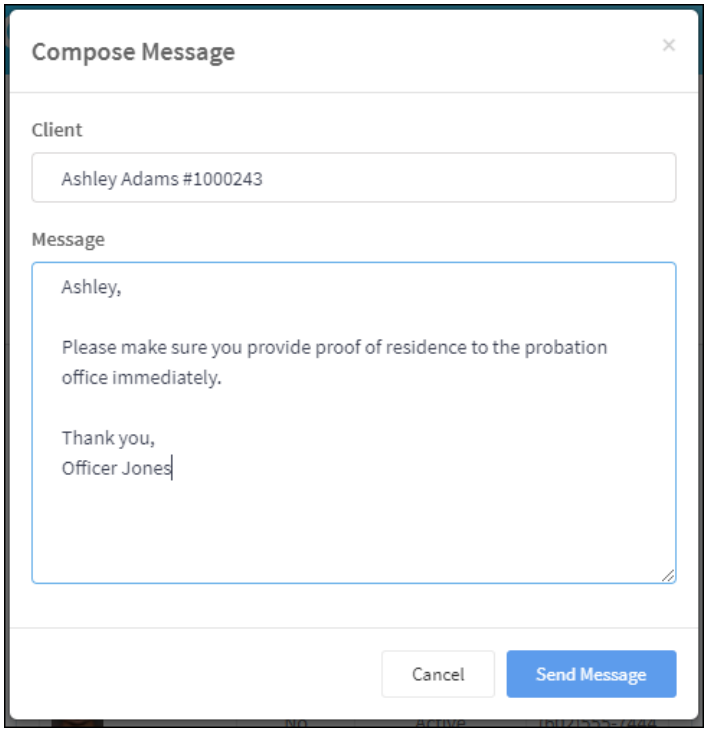
Ce Check-in allows you to compose a message to a client that displays on their screen the next time they check in. You can compose a check-in message for a client in any caseload, but only for one client at a time.

1. From any page in Ce Check-in, click the compose check-in message icon on the toolbar. The **Compose Message** dialog box opens.
2. In **Client** field, enter the name or ID number of the client you want to compose a message for. Select the client from the results list.



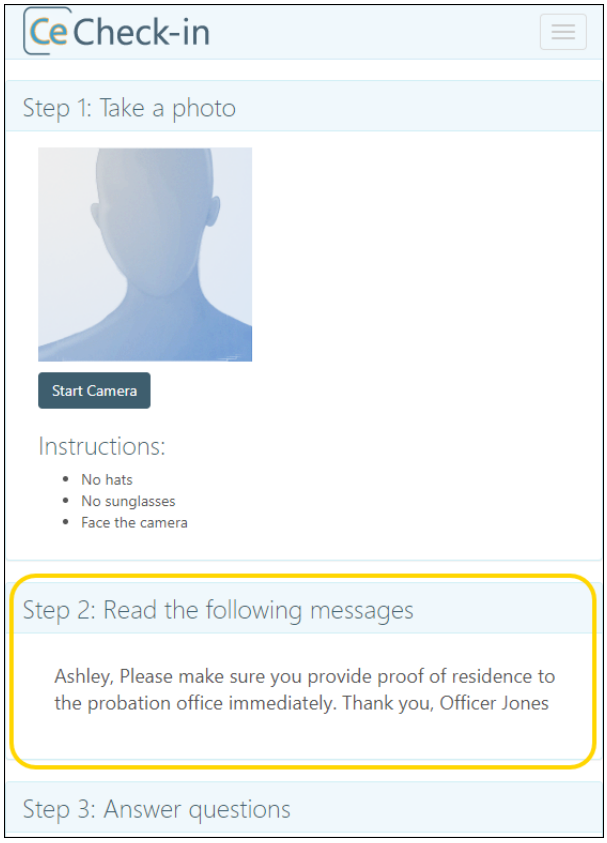
> **Tip:** If you go to a client's ***Client Overview*** page first, and then click the compose check-in message icon on the toolbar, the system will populate the client's name and ID number in the **Client** field automatically.

3. In the **Message** field, compose your message to the client.



4. Click **Send Message**. A confirmation message displays.

The message you composed will be displayed to the client during their next check-in.



Using SMS text message chat

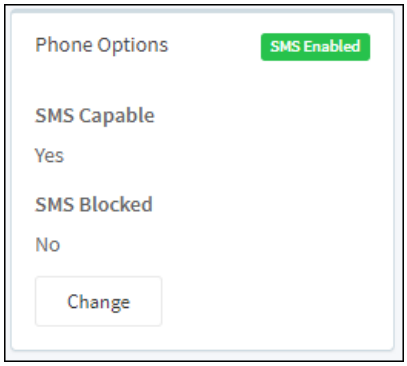
Ce Check-in supports sending and receiving SMS text messages within the application so that you can communicate with clients without using your personal cell phone number or device. You can use text messages to get in touch with clients quickly, and clients can use them to keep you informed of their status or whereabouts.

> **Note:** The SMS chat feature discussed in this topic is different from the automated SMS notifications feature. See "Using automated client notifications" on page 71 for more information.

Requirements to use SMS chat

This feature requires an integration with Caseload Explorer. To receive messages, a client must have a phone number marked **Mobile** in their Caseload Explorer record. This number syncs to Ce Check-in. In Ce Check-in, the number must show as **SMS Capable** and the client must not have unsubscribed from (i.e., blocked) the SMS feature (see "Unsubscribing from SMS text messages" on page 70 for more information).

From the ***Client Overview*** page in Ce Check-in, you can verify the number is SMS capable and that the client has not blocked the SMS feature.



> **Note:** You can use the SMS chat feature with *all* clients synced to Ce Check-in, including those without a reporting schedule.

How does SMS chat work?

Ce Check-in uses a third party communications vendor called Twilio that manages the exchange of text messages between you and your clients. Your agency is assigned a single phone number with an area code local to your agency. When you send a text message to a client from within Ce

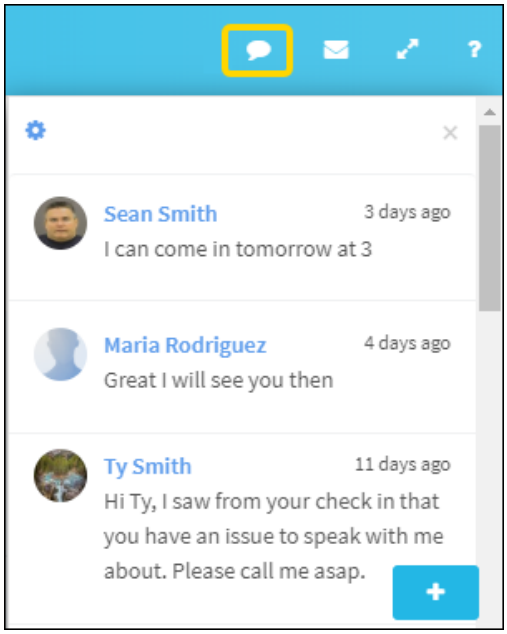
Check-in, the system sends the message from this phone number. Sending all messages from a consistent local phone number means clients are more likely to recognize your agency as the sender, and they'll also know what number to use to text you.

> **Note:** Text messages do not link to any personal or work phone of any agency officers or staff.

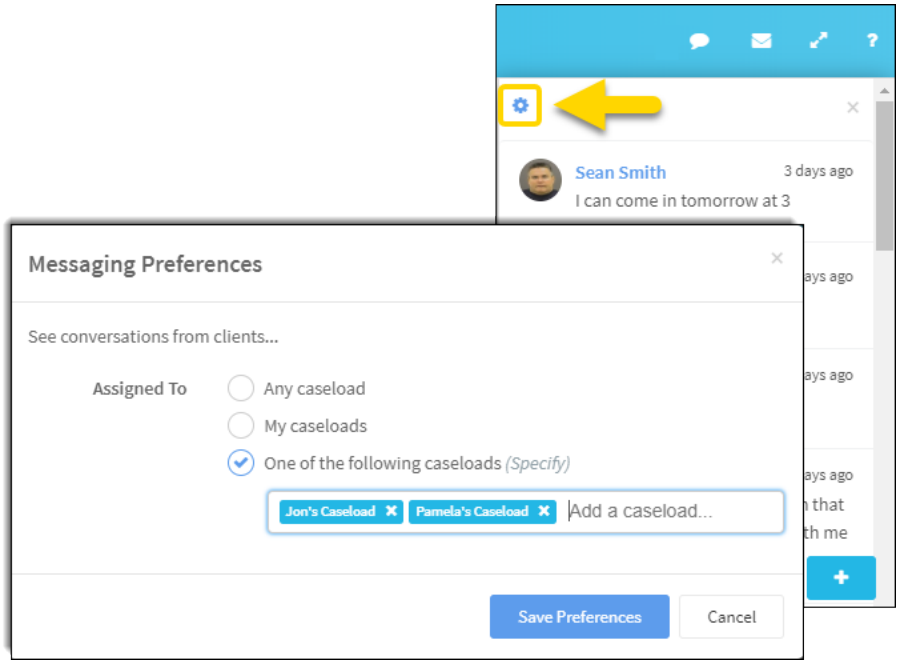
How to use SMS chat

You'll send and receive SMS text messages from the ***Chat Panel***.

1. To open the **Chat Panel**, click the SMS chat icon on the toolbar.

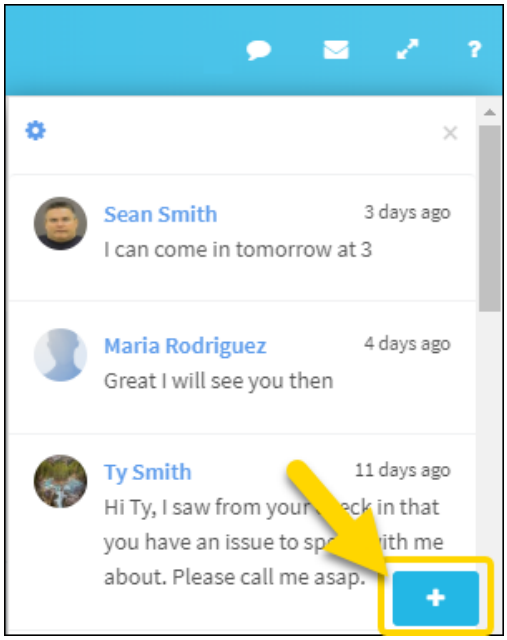


2. The panel only displays the chat conversations with clients in the caseload(s) you specify. To choose which caseloads to display, click the settings icon at the top left of the ***Chat Panel***. The **Messaging Preferences** dialog box opens. Select to view messages from any caseload, your caseload(s), or specific caseloads. Then click **Save Preferences**.



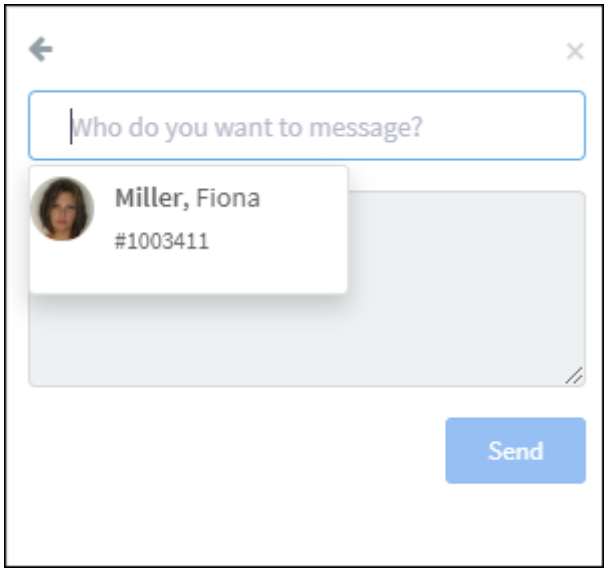
> **Note:** This setting also determines which clients you can send text messages to from the ***Chat Panel***. Before you attempt to send a text message to a client, make sure you've selected that client's caseload in the **Messaging Preferences** dialog box.

3. To send a message, click the plus sign at the bottom right of the **Chat Panel**.

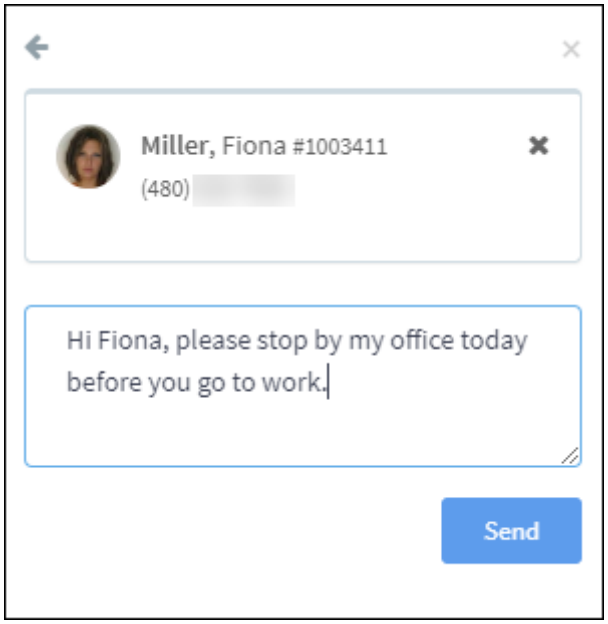


4. Search for the client you want to send a text message to. You can only message one client at a time (no group messaging). Remember that you must have selected the client's caseload in

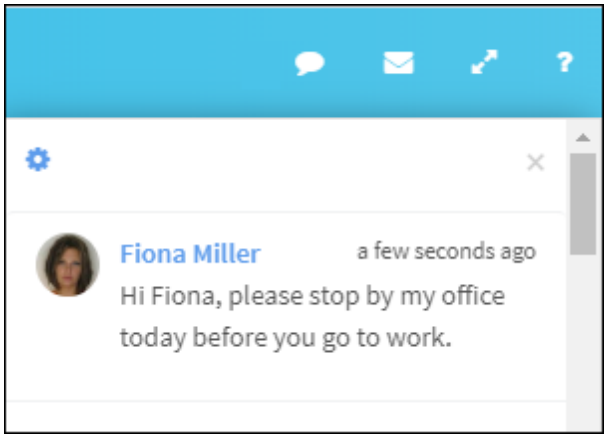
the **Messaging Preferences** dialog box for the system to find the client.



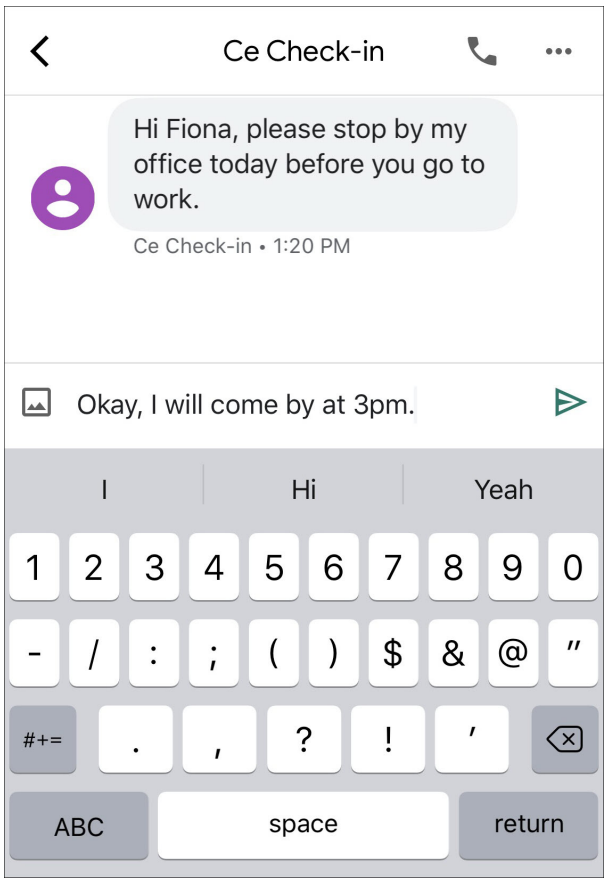
5. Enter your message, then click **Send**.



6. Your message displays in a chat thread on the ***Chat Panel***.

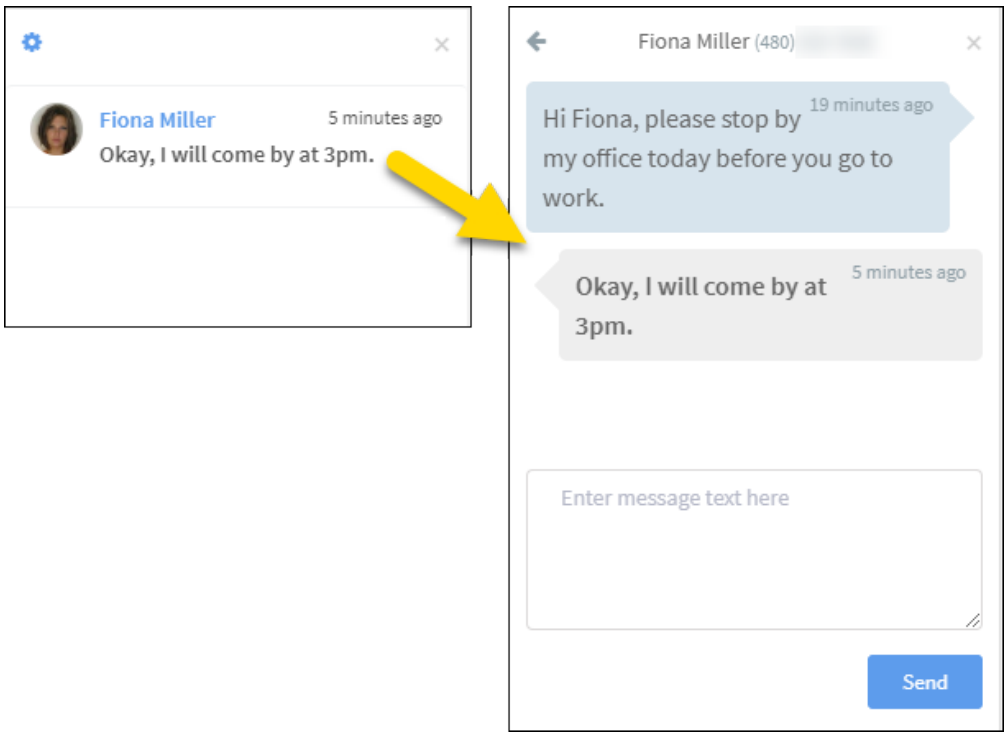


7. When the client receives your text message on their mobile device, they can respond to it like they normally would respond to any other text message.



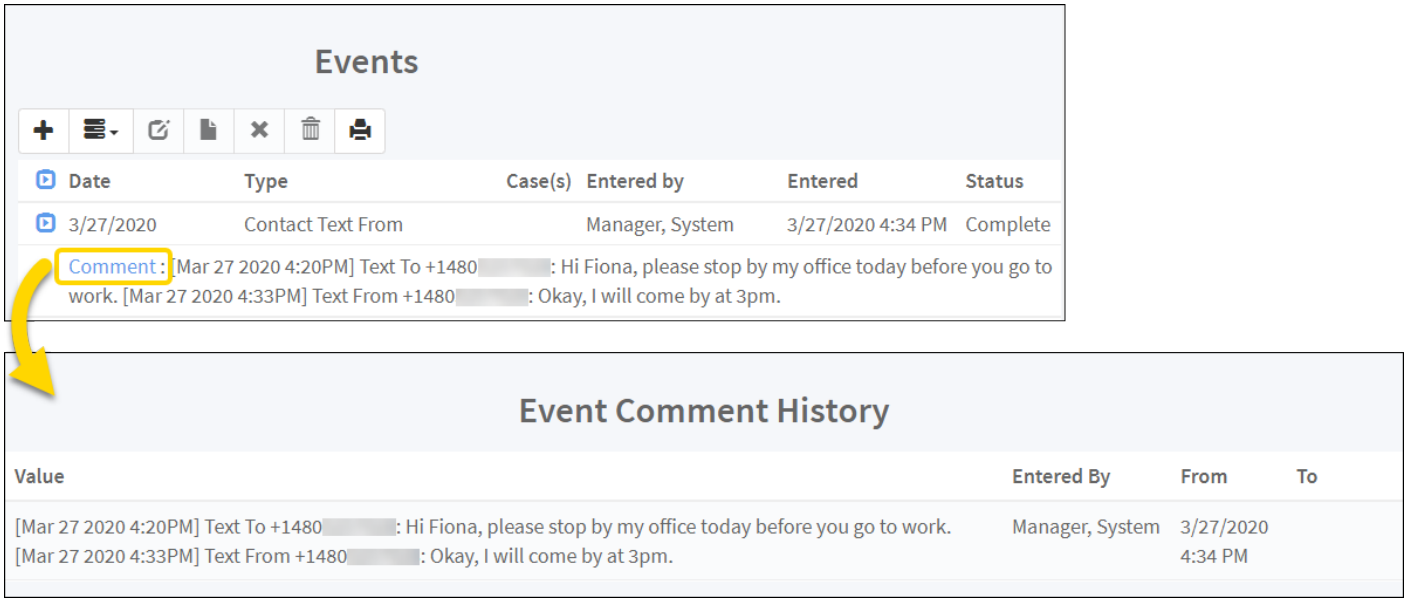
8. When Ce Check-in receives the client's response, a red badge appears on the SMS messages icon in the toolbar letting you know how many incoming messages you've received.

9. Open the ***Chat Panel*** to view the client's response. Click on the message thread to view the full conversation and send another message.



Chat records in Caseload Explorer

Records of all SMS chats are synced back to Caseload Explorer on the ***Events*** page. Chats are consolidated to one event per 24 hours. Click the **Comment** link to view the conversation.



Unsubscribing from SMS text messages

To be compliant with federal text messaging regulations, Ce Check-in allows clients to unsubscribe from Ce Check-in SMS text messages if they no longer wish to receive them. Clients can unsubscribe from Ce Check-in messages using the following steps:

1. From their mobile device, the client texts the word "STOP" to your agency's Ce Check-in phone number.
2. The following occurs:
    - The client receives a confirmation text message indicating they have been unsubscribed.
    - Ce Check-in automatically updates the ***Client Overview*** page > **Phone Options** section to show **Yes** under **SMS Blocked**.

> **Note:** If the client later wishes to resubscribe to Ce Check-in SMS text messages, they can text the word "START" to your agency's Ce Check-in phone number.

Frequently asked questions about SMS chat

To start using the SMS chat feature, must I (the user) be the first to initiate any communication?

When you're using the SMS chat feature for the first time with any given client, we recommend you be the one to initiate contact to identify your agency's name. However, this is not required. If the client has your agency's designated SMS chat phone number, they can send a text message to you first. Ce Check-in will notify you that you've received a message by displaying a red badge on the toolbar and the message will display in the ***Chat Panel***. All messages from the client's phone number are linked to that specific client.

Are there any instructions we (officers) should provide to clients?

Let your clients know that they will be receiving text messages from your agency's assigned phone number. Instruct the client to save the number as a contact in their phone, so that they know that future messages are from their probation officer. Clients can respond to text messages the same way they would normally respond to any other text messages; no special instructions needed.

Using automated client notifications

Ce Check-in supports generating automated notifications that tell clients when a check-in is due, when they've missed a check-in, and when their reporting schedule has been changed or suspended. Your agency enables automated notifications. For clients to receive automated notifications, the client must have an assigned reporting schedule in Ce Check-in and valid contact information in Caseload Explorer. If the client has:

- A listed email address, they'll get an email notification.
- A listed mobile phone number that is SMS capable, they'll get an SMS text message notification.
- A listed mobile phone number that is not SMS capable or has blocked SMS, they'll get a voice notification via robocall.

Exception: Notifications of changes to reporting schedule are sent via email only.

Note: SMS text message notifications are only sent to clients who have an assigned reporting schedule in Ce Check-in; however, you can use the SMS chat feature with *all* clients in Ce Check-in, including those without a reporting schedule. See "Using SMS text message chat" on page 64.

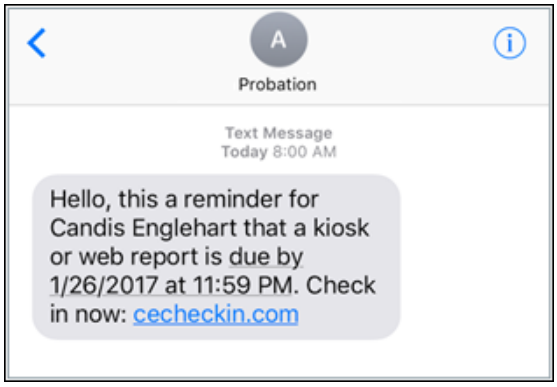
Reminders for scheduled check-ins

Ce Check-in sends reminders to the client when they have an upcoming check-in due that they've not yet completed. Reminder frequency is based on the client's reporting schedule and follows this timetable:

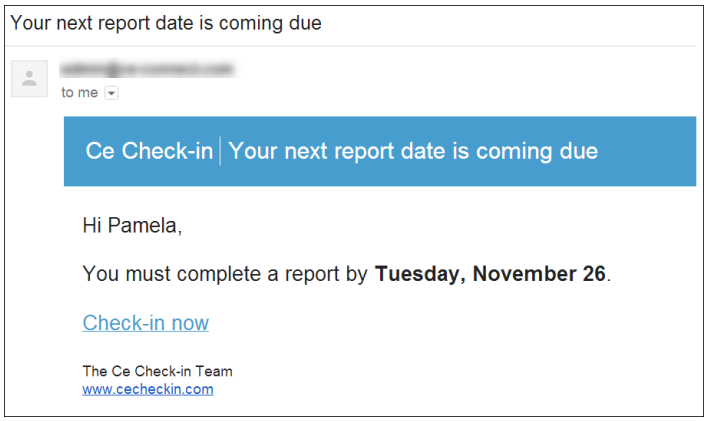
Reporting Schedule	1st Reminder Sent	2nd Reminder Sent
Daily	On the check-in due date	N/A
Weekly	4 days prior to check-in due date	On the check-in due date
Monthly: Anytime	7 days prior to check-in due date	
Monthly: Birthday Week	7 days prior to check-in due date	
Monthly: Days 1-10	1 day prior to check-in due date	
Quarterly	7 days prior to check-in due date	

Sample reminders

- **SMS text message:**



- **Email:**



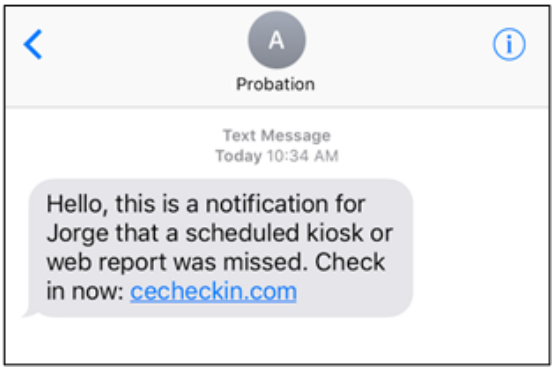
- **Voice:** "Hello, this a reminder for Pamela that a web report is due by Tuesday, November 26 at 11:59 PM. Thank you. Goodbye."

Notifications of missed check-ins

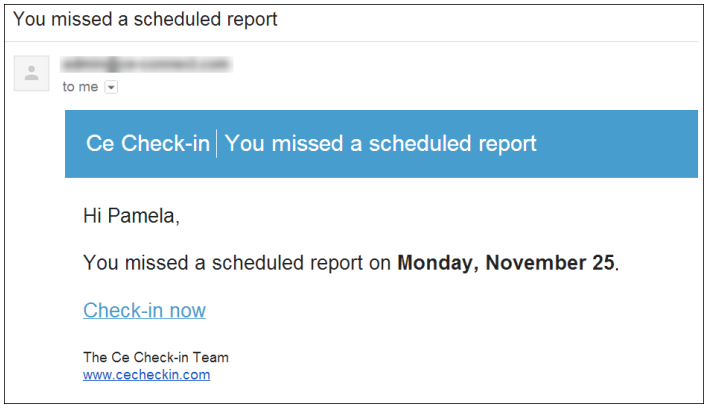
If a client has not checked in by the due date, the system triggers a missed check-in notification.

Sample missed check-in notifications

- **SMS text message:**



- **Email:**



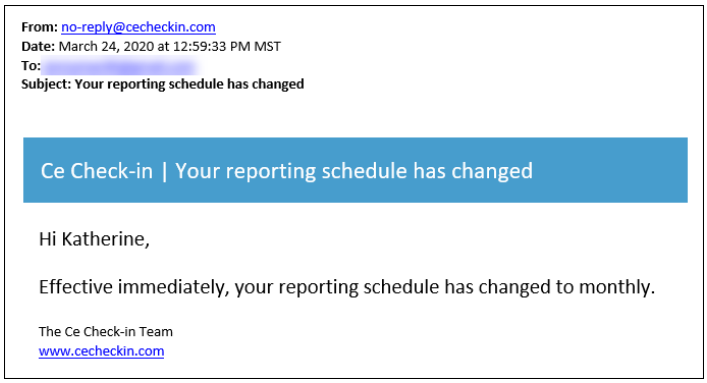
- **Voice:** "Hello, this is a notification for Pamela that a scheduled web report was missed. Thank you. Goodbye."

Notifications of changes to reporting schedule

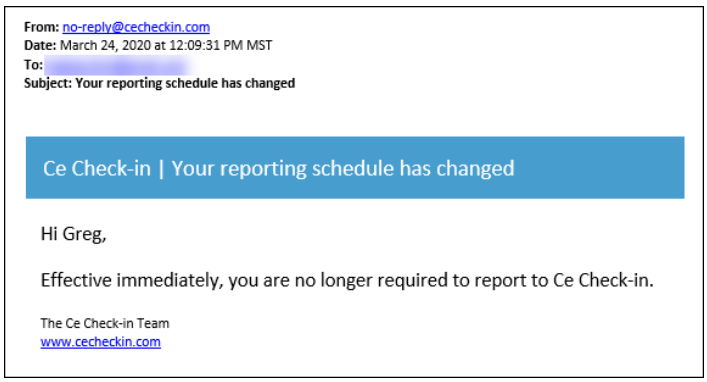
When a client's reporting schedule is changed or disabled, the system triggers an email notification for the client.

Sample email notifications

- **Schedule changed:**



- **Schedule disabled:**

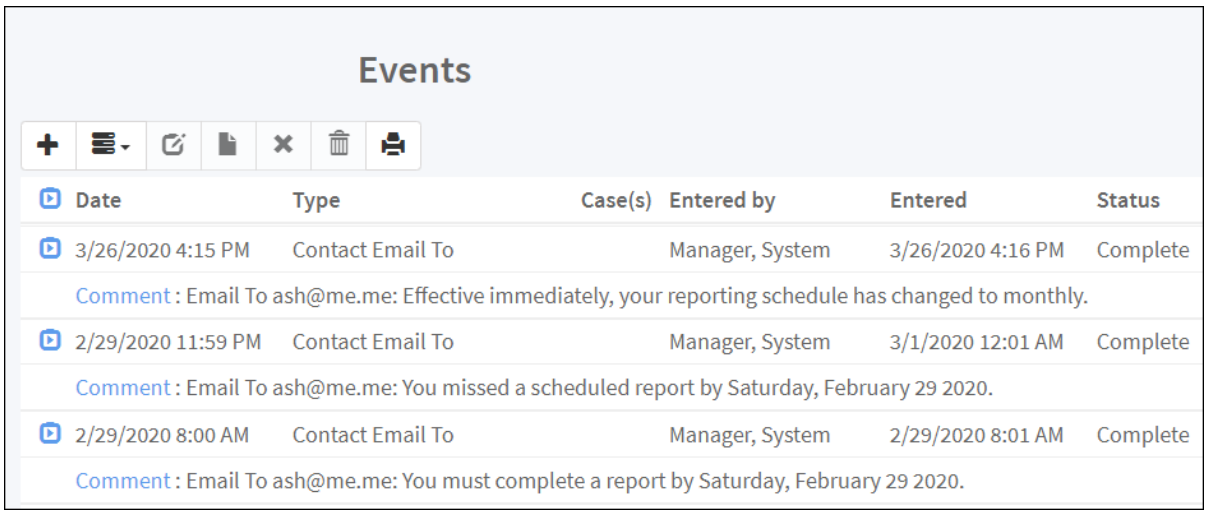


What time of day are email and SMS notifications sent?

- When an email notification is triggered, the system sends the email immediately, regardless of time of day.
- When an SMS text message is triggered, one of two scenarios occurs:
  - If the SMS text message is triggered during the client's local daytime hours of 8:00 AM to 7:00 PM, the system sends the text message during the same window.
  - If the SMS text message is triggered after 7:00 PM local time (which typically occurs due to a missed check-in), the system sends the text message the next day at 8:00 AM.

How to I know the notification was sent successfully?

Notifications sent to a client are recorded as contact events on the ***Events*** page in Caseload Explorer.



Resetting a client's registration

You can reset a client's registration if they forget the answer to their security question and cannot retrieve their PIN or reset their password. Resetting a client's registration allows them to re-register in Ce Check-in and set a new password. Complete the following steps.

Note: All of the client's reporting history is saved when you reset their registration.

1. Open the ***Client Overview*** page for the desired client.

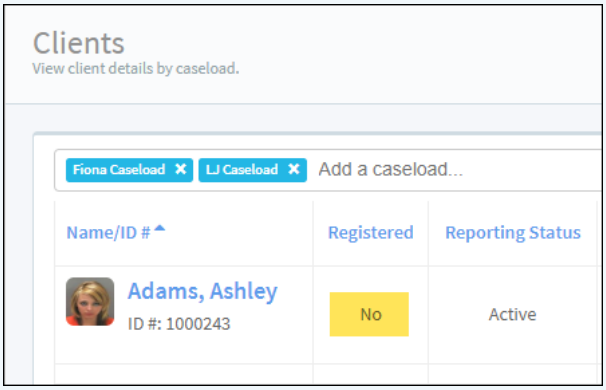
   Tip: Search for the client from the toolbar to find them quickly.

2. At the top right, click **Reset Registration**.

3. Click **Yes** at the prompt.

A confirmation message displays. The client can now re-register for Ce Check-in. See "Step 3: Facilitate client's registration" on page 21.

Note: The **Registered** column on the ***Clients*** list view changes from **Yes** to **No** until the client re-registers.



Sample check-in questions

Following are sample questions your agency may include in the check-in questionnaire.

Questions about court, law enforcement, and treatment

- Have you missed any court dates since your last report?
- Have you had your final court date?
- Have you had any contact with law enforcement?
- Have you been arrested, cited, or jailed anywhere?
- Are you currently attending mandated/court classes?
- Have you missed any treatment sessions since your last report?

Questions about living situation and contact information

- Is your address the same since you last reported?
- Do you still live in the county?
- Are you living with the same people since you last reported?
- Has your phone number changed?
- Has your email address changed?
- Are you planning to leave the county or state in the next 30 days?
- Have you purchased or registered a car since your last probation check in?

Questions about employment and student status

- Has your employment changed since your last report?
- Are you working more than 30 hours per week?
- Are you looking for work?
- Are you enrolled and attending any job training classes anywhere?
- Has your employment or school status changed?

Questions about financial account status

- Have you paid any money on your restitution and fees/fines?
- Are you regularly paying any money on your collections account?
- Are you behind in payment of any probation fees?
- Are you behind in your restitution payments?

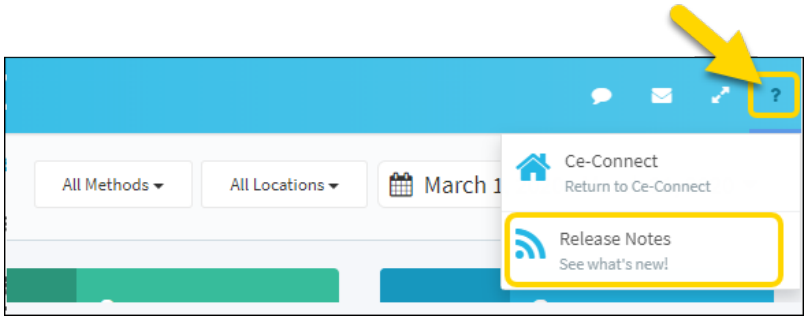
General questions

- Do you have any problems or requests you need to discuss with your probation officer?
- Are there any other changes of which we need to be aware?

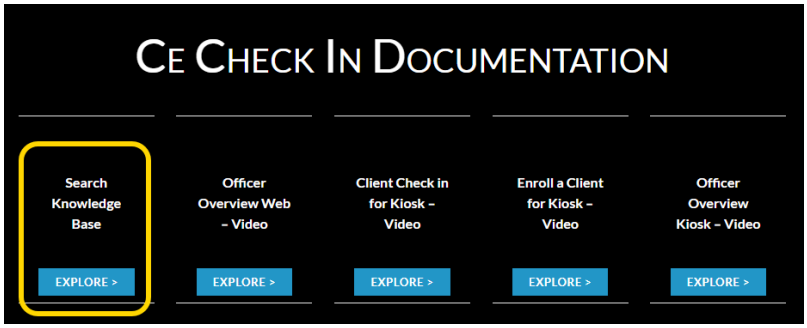
Using the knowledge base

Follow these steps to access the knowledge base to get answers to common support questions.

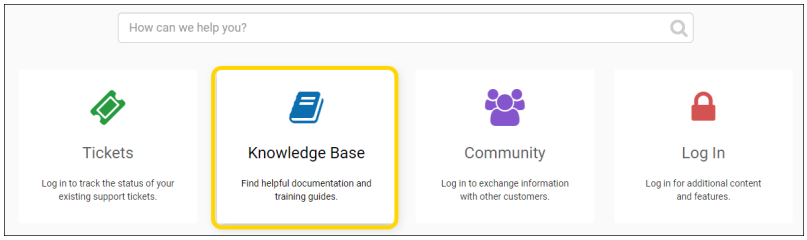
1. Sign in to Ce Check-in.
2. Click the help icon ? at the top right and select **Release Notes**.



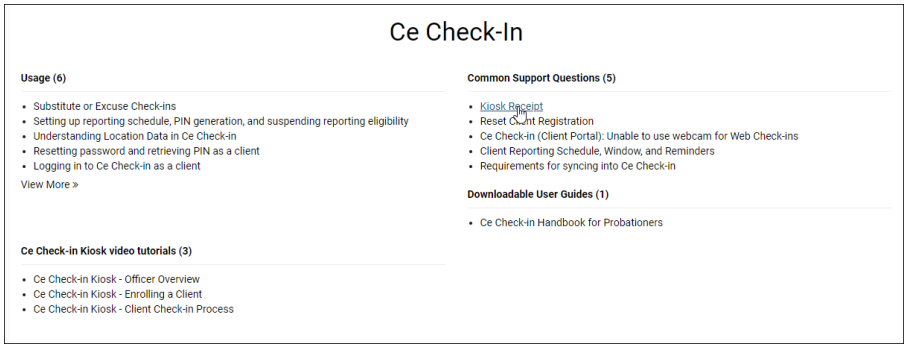
3. On the ***Ce Check-in Documentation*** page, click **Explore** under **Search Knowledge Base**.



4. You're directed to the Support Portal. Click **Knowledge Base**.



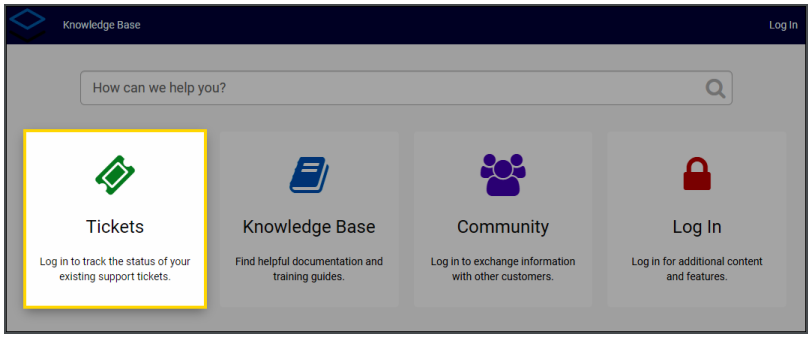
5. Under **Ce Check-in**, available knowledge base articles and resources are displayed. Click on a link to view an item.



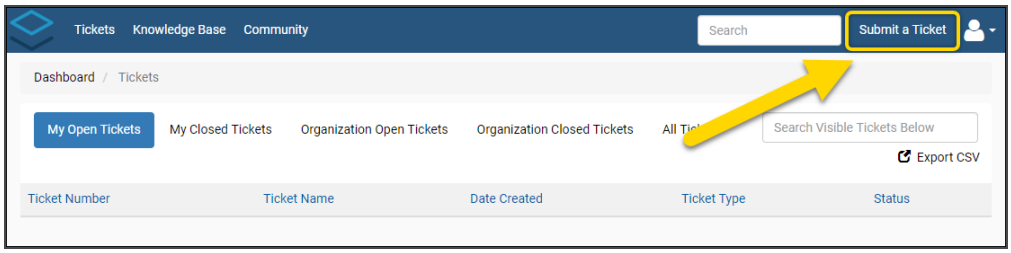
Getting support

For questions or issues with Ce Check-in that aren't addressed here, contact your supervisor for help. After that, the following workflow applies:

1. If your supervisor is unable to answer the question or resolve the issue, they contact the court or agency's IT department or designated contact person.
2. If the IT department or the designated contact person is unable to resolve the issue, they report the issue to AutoMon by submitting a Support ticket. To submit a Support ticket:
   a. Open a browser and go to the Customer Support Portal.
   b. Click **Tickets** on the left and sign in.



   c. Click **Submit a Ticket** on the top right.



   d. Complete the ticket, including:
      - Product name and version
      - Environment
      - Customer name
      - Name of the staff member with the question or issue
      - Description of error messages received, if any
      - Description of attempts made to troubleshoot the problem, including screenshots if available.
   e. Click **Submit Ticket**.
      An AutoMon Support representative will be in touch to troubleshoot the issue.