Detailed Agenda: PC JIMS Training Seminar, Oct. 14-16, 2015 at Touch of Nature Conference Center, Southern Illinois University at Carbondale

Breakfast 8:00-9:00 (at Touch of Nature)
Training 9:00-5:00, 9:00-noon on Friday

Please use the PC JIMS Training Seminar online sign-up form to register for this event.

Day 1

PC Terminology
Mouse-less tips:

1. Use the ENTER key on active buttons (indicated by the dotted box around the edge).
2. Use the Windows key instead of right-clicking to see a menu. (You have to click on a row or a field first!)
3. In menus, use the underlined letter by itself to access that function. (Ex. Hub File/New has underlined N, and Name Search Tab has underlined N. Needed a way to know which N you needed, so when the underlined letter is on a menu, use the letter alone.)
4. Don't forget the shortcut function keys in the hub.
5. When filling out data fields, use F4 to activate a drop-down box (or just start typing and it will drop down automatically.
6. For tabs and buttons, Alt + the underlined letter will go to that tab or activate that button.
7. Use the ESC to back out of a menu that you didn't want.
8. In checkboxes, use the SPACEBAR to check or uncheck the box.
9. In programs that have two grids (such as the HEARINGS screen, the CIVIL DISPOSITION screen and the EDIT ACCOUNTS screen), Alt/F1 can take you from the upper grid to the lower grid.

Case Management Hub

Edit Preferences: Setting up your preferences for future use

Auto Refresh-will automatically update your hub each time you return
Log Notices--automatically makes record sheet entries for hub notices, hearing notices, and notice generation documents that are set up to be logged.
Launch Imaging on Export--Opens Imaging to show exported image and its hyperlink. Works in conjunction with the "Print e-signature on notices" option on the Other Tab in Technical/Edit Custom Information.
Event Settings--Controls the date of auto-logged entries, and optionally the judge and court reporter initials for those entries as well. Resets to current date upon hub exit.

View Options—The View menu allows you to customize the Hub with the amount of detail that you want to see. Options include:

Litigants—Controls whether ALL litigants are shown (when checkmarked) or just the first defendant or first plaintiff and defendant on a civil case (when not checkmarked)
Payment status—Controls whether the hub shows columns for Due Amount/Paid/Balance/Last Paid/Pending Bond. Note that Collections options in the Hub will not be accessible unless this option is checked.
Hearings—The View menu controls whether the hub displays hearings below the defendant. Options are to display current hearings, and hearings that are recently expired.
Charges—Displays all of the charges for a litigant.
Alias flag—Shows an icon of a pair of sunglasses if the name you are looking at is actually the alias on the case, rather than the defendant's name.
File Status--Adds a File Out column to the hub that will show a checkmark on cases whose files have been checked out.

Search options

Standard tabs for searching by name, case number, DLN, SSN and ticket number
Include alias search results by using the alias checkbox
Searching for names from the right side
Phonetic name searches
Pulling cases into the hub by hearing date and time
Advanced tip: Moving to the left and right without using the mouse

Hub: Q & A

Functions available in the CM Hub

Filing new cases: Add vs. Insert
Right-click a name or case number to view your hub options

Keyboard shortcuts
Inquiry menu

Hub: Q & A

<u>Filing criminal cases</u> **(Case Management Hub File/New Case/Add)**

Edit Preferences: (Circle your options for future reference)

Set all litigants—If this is check-marked, all of the litigants on civil cases will be scheduled for the same hearings. Note that while the default is for this to be un-checked on criminal cases, you might want to checkmark it manually when you are filing a juvenile case IF YOUR OFFICE ADDS THE BIOLOGICAL PARENTS TO THE JUVENILE CASES. As an alternative, you can file the juvenile case first, and then schedule the case using the Edit Hearings program. As long as you access Edit Hearings from the Case Number row in the Hub, all of the parties will be scheduled.

Auto-print folder label

Logging—When filing cases auto-logging makes entries regarding attorneys, hearings, warrants and bonds.

Litigant Tab: Entering litigant information

Litigant name--F4 prompts for prior cases

Case Tab: Entering case information

Cash Bond Set field: This is for the Bond SET amount. NOT the Bond Paid Amount. If an amount is in this field and the bond type is either 100% or 10%, you will be given the opportunity to receipt a cash bond when you click Save.

Hearing Tab: Entering hearing information

Use Last—Copies in settings from the last scheduled case.

Save as Default—Saves settings as default for that hearing type.

Use Default—You supply the hearing type and click Use Default and we will pull up the last saved default date, time, judge etc for that hearing type.

Vehicle Tab: Entering vehicle information on TR cases

Charges screen

Edit Preferences: (Circle your options for future reference)

Suggested settings

Checkmark: Filter Charges by Case Type, MFU Charges and Default Action Date

Leave unchecked: Show repealed

Optional: Auto-Shift (not really needed for larger monitors), Show no insurance priors.

Three ways to pick a charge:

Typing the offense in the dropdown box

Choosing a charge from the Most Frequently Used Charges list

Searching the Offense Table

Leave the Include Repealed box UNCHECKED unless you are working on an old case.

Note the links to access the statutes online.

Copying one count down to other counts

Dragging one count down to another

Filing new criminal cases: Q & A

<u>Editing a case (F2)</u>

Adding litigants

Adding biological parents to Juvie cases

Close them from the get-go

Cancel on the Charge screen

Adding attorneys

Adding aliases

Editing criminal cases: Q & A

<u>Edit Custody (F11)</u>

For warrant and arrest information after the initial filing

Edit Custody: Q & A

<u>Edit Hearings (F6)</u>

Edit Preferences: Setting up your preferences for future use (Circle your options for future reference)

Preview notice/Print Courtroom/Print Judge/Print Barcodes/Position to Last Row

Auto FTA notice/Email Atty notices/Print File Copy/Logging—Auto/Manual

View: Suggested settings
- Checkmark: Day of the week
- Uncheck: Litigant Hearings, Court reporter
- Optional: Email address (only needed in offices that email notices

Tools
- Overview -- (will be covered later)
- Recurring hearings
- Recusing judges
- Auto-check all litigants or pending litigants for notices

Other functionality in Edit Hearings screen
- Double-click a name to edit the address for that person
- Adding a notificant
- Adding or changing a comment

Edit Hearings: Q & A

<u>Making record sheet entries (F5)</u>

Auto logging is optional from the following screens:
- File a New Case
- Edit Litigant
    - Warrant issued
    - Change of counsel
- Hearings Editor
    - New hearings and rescheduled hearings
- Account Editor
    - New Accounts
    - Payments & balances
    - Bonds posted & applied
- Notice Generation

Notify parties of record sheet entries

Spell check

Edit Record Sheet: Q & A

<u>Checking case folders in or out (F9)</u>

By case

By docket--Scheduling/Utilities/Update folder status for docketed cases

<u>Closing cases-Edit Charges (F7)</u>

Edit Preferences: (Circle your options for future reference)
Checkmark Filter Charges by Case Type, MFU Charges and Default Action Date
Leave unchecked: Show repealed
Optional: Auto-Shift (not really needed for larger monitors), Show no insurance priors.

Auto dispositions

Adding dispositions and sentences manually

Keyboard shortcuts
- **Cntl + N** – From an existing count—adds another count
- **Cntl + G** – From an existing count or charge—adds another charge
- **Cntl + D** – From a charge—adds a disposition line
- **Cntl + T** – From a charge or disposition—adds a sentence

Copying dispositions and sentences to other

Dragging charges, dispositions and sentences (click row, lift up and click again, then drag)

Amended and lesser and included charges

Closing criminal and traffic cases: Q & A

<u>Edit Account (F3)</u>

Edit Preferences: (Circle your options for future reference)
Print old receipt/Deferred Printing/Give Audit Msg/Sort options/Logging Auto or Manual

Receipting vouchers and bonds (File/New Payment/Voucher or Bond or Add Receipt/Bond/Payment from the Hub)

Advanced tip: Setting up a new account and taking a payment? If your new account has Drug Court, or any other fee that is subject to a clerk operations deduction, hit Save BEFORE you add the new payment or reclassify a bond. The screen will lead you through the Confirm Percentage screen and return you to the Edit Accounts screen so that you can still take the payment.

Lower grid Activities: ALL right-click actions need to be below the column header!

Calc--For new payments or bond reclassifications on traffic no appearance cases.
Distributing new vouchers--Right-click on the voucher in the lower grid and choose Auto-Distribute
Reclassifying bonds --Right-click on a bond and choose Auto-Reclassify
Unreclassifying a bond--Right-click on a bond and choose Un-Reclass
When is this function appropriate and when is it not? The importance of disbursement flags!
Transferring bonds--Right-click on a bond and choose Transfer
Following a transferred bond--Window menu/Bond Transfers
Advanced tip: Bookkeepers should run audit reports regularly to look for possible errors in transfers with different names. (Courts/Case Man/Reports/General/Audited Transactions for record type *PAYMNT and action of *TRANSFER.
Refunding bonds
Assigning bond refunds
Vacate Transaction—Right click anywhere in a transaction anywhere below the header to vacate it.**)**
Vacate a Fee--Right click on the Due column or on a particular fee in a payment
Bad Check Function--Right-click in the column of the voucher that was paid with a bad check and choose Bad CHECK.
Advanced tip: What if the payment you need to vacate has restitution on it? Vacate other paid fees in place of debits to restitution, or change the fee distribution of a bad check transaction.
Reprinting a receipt--Right-click in the voucher column reprint a receipt
Deleting a voucher or bond--Right-click in the lower grid and choose Delete
Clearing a monetary field--Right-click on the field and choose Clear
Viewing Case Comments from Edit Accounts--Use Window menu or F13
View Checks: Available from Restitution field or from Refund/Overpay field

Setting up a new A/R (File/New Account adds the "Due" column)

Apportioning fees (Splits) (For fees such as Drug Enforcement, DUI Equipment or FTA Warrant fee... Put the amount into the Due Column, then right-click on the amount and go to **Edit/Recipients**.)
Setting up restitution victims (Right-click on restitution amount in due column and choose Edit/Recipients.) (J & S)
Copying recipient addresses to other cases such as business addresses (Copy to All checkbox in Recipient Address screen.)
View Eligible Fees & View ALL Fees--to see remaining fee fields once an account has been set up
Add Amount--type an amount to add TO an existing fee amount

Edit Account: Q & A

<u>Recipient Search screen</u>

Search for a restitution victim by going to: Courts/Finance/Recipient Search

<u>Payor Search</u>

Search Tabs
Name, Case Number, Date (user and branch), Receipt number & Check number
Sorting by column headers

Double-click any transaction to edit

View menu
Fines and fees from the hub
Fee totals from the hub

Receipting of NS Bonds/Receipts
Transferring NS Bonds (or other bonds) to cases

Right-click options
Copy—Copies text from the grid to paste into other programs such as Excel
Edit—to edit a transaction
Transfer—to transfer a bond
Reprint—to reprint a receipt

<u>Day 2</u>

<u>SOS and ISP Notices</u>

Notice of Failure to Appear—(Can be set to print automatically from the Edit Hearings screen when the FTC/FTA hearing is scheduled, or can be printed individually from the Hub. IF you print it from the hub, make sure that the continued court date is scheduled first! Cases must have DL or Promise to Comply as Release Type.)
Notice of FTP/FTP Receipt (Changes depending upon the disposition on the case—705--Failure to Pay or 706--Paid in Full.)
SOS Compliance Notice (Won't print unless there is a 307--Compliance Notice or 653--Vacate FTA Order disposition on the case.)
SOS Notice of Court Supervision (Won't generate a notice unless the charge is reportable to the SOS and the case has a 403--Withhold Judgment/Supervision disposition.)
Report of Court Disposition (Right-click on the charge line to print.)
ISP Supplemental Disposition Form (Right-click on the charge line to print.)

<u>Filing civil cases</u>

Edit Preferences
- **Set all litigants**—Turn this off if you are on a case where litigants should be scheduled separately.
- **Auto-print case folder label**
- **Logging—auto or manual**

Initial plaintiff and defendant
- Probate cases: What is the proper way to file a Probate Case?
  - Correct litigant type and case subtype codes
- How to fix litigant type codes and case subtypes

Adding other litigants and their attorneys
Filing civil cases: Q & A

<u>Closing civil cases</u>

Edit Preferences
- **Sort dispositions** – numerically or alphabetically

Adding complaints, counts and dispositions
- Judgment dispositions
- Best way to enter non-judgment dispositions (Put everyone in FOR column unless it is really for and against someone.)
- Close affected -- Don't forget to close the litigants!
- Jury flag—Should reflect whether case was actually closed by jury or not

Post-terminating and reinstating litigants from within the civil disposition screen
- **Works on Post-Termination Dispositions 940-944**
- **Reinstate Affected works on REINSTATE disposition**
- **Once a case is post-terminated or reinstated, when you add the NEXT disposition, right-click on the disposition date and choose END POST-TERM AFFECTED.**

Closing civil cases: Q & A

<u>Miscellaneous Programs</u>

Print criminal and civil case histories-Inquiry menu
- **Printing a history for someone who doesn't have any cases in your system. (Just go in from ANY case, and change the name and DOB to the name and DOB you are looking for.)**

Scheduling:
- **View Schedule Information (Courts/Scheduling/Utilities/View Schedule Info)**
  - Sorting options--(Can sort by any Column Header)
  - Edit scheduled cases as they are displayed
- **View Caseload (Scheduling Menu/Utilities/View Caseload)** --Accessible also from the Tools/Overview option in the Edit Hearings screen. Drill down to the Courtroom level and double-click a time column to pull the date, time and courtroom into the Edit Hearings screen.)
- **Advanced tips:**
  Setting up hearing type durations and how they affect the View Caseload and View Schedule Information screen

Setting up case type conflicts and event type conflicts for further control over the court calendar

Copy litigant data to other cases

Selecting cases to copy data to…

Batch Tab--Use First and Last Name, but keep your eye on the middle initials. Also, you might want to pull up Pending Only first--and then UNcheck that box and pull up cases with BALANCES next.

View Balance on Account with Disbursement Data (Right-click name/Inquiry/View Balance on Account. Make sure View Menu is set up to display Ordered Fees, and Disbursement Data.)

Advanced: If time allows

Add Exparte & 30-Day Notice Dispostions
Add FTA & FTP Dispositions
PC JIMS Probation: Pulling addresses from PC JIMS Probation
Changing colors in PC JIMS
Adjusting payment schedules

__Of Interest to Bookkeepers__

Edit Deposits
Print a Check
Edit a Check and the Check Search screen
Reissuing checks--Why this option is SOOOO important
Locating missing receipt numbers
Reconciling your disbursements
Setting up the address for a new fee--How the Recipient Number affects how the checks are printed
Posting checks
Balancing PC JIMS to your bank statement
Closing the accounting period
Bookkeeping: Q & A

__ADR__

Proofing ADR
Edit Errors program—Easy fast access to fix ADR errors
Maintain Files
Searching for a case in a prior file
Downloading an ADR file for a second time
Advanced tip: ADR information in the Edit Charges screen--What it means
Advanced tip: ADR Audit Data--What it shows
BOI Report--Being pro-active about missing DCN's
ADR: Q & A

__Child Support__

Hub: Searching the support hub by case number, name or SSN
Adding new accounts
Adding parties
Pulling in party addresses from the Divorce case
Editing orders
Add Recipient
Add Extension Type
Add Extension
Receipting payments
Transferring payments and orders
Inquiry menu
View balances for all accounts from the Supporter line
View balances for a single account from that account line
Viewing a payment history
Double-click a payment to edit it
Reprint a receipt from the payment history screen
SDU Download program
Child Support: Q & A

Day 3

Imaging basics

Adding and removing hyperlinks
Editing your auto-hyperlink list
Understanding Imaging user groups and how they work
Exporting documents for email or other purposes
Exporting case files for microfilm
Transferring documents to other case and/or user groups
Using Imaging to streamline your daily court call

Auto-logging/hyperlinking and exporting documents

E-mailing notices to attorneys and putting them into Imaging
Exporting hub notices to Imaging
Exporting notices of a hearing to Imaging
Exporting notice generation documents to Imaging

Where two worlds collide: Imaging + e-routing = internal e-filing

Routing incoming e-filings to a judge for electronic signature and e-filing back to the Clerk--How to get ready for it
Connecting your judge table to their user ID
Identifying judges in Imaging
Setting up your NG docs for placement of the judge signature

E-appeal basics

Getting a case set up for export
Importing documents from court reporters or other sources
Labeling documents for indexing
Exporting and proofing your e-appeal

A brief look at the future of e-filing

"Internal" e-filing by any Imaging user (upload, e-sig and e-file)
E-Filing of documents produced in PCJ Pros criminal e-Filing

Sign-up for this event using the PC JIMS Training Seminar online sign-up form.

Do you have questions about how to perform certain tasks using PC JIMS that aren't covered in the agenda? Please enter your questions in the COMMENTS field at the bottom of the sign-up form when registering. Be as clear as you can, and we'll do what we can to include answers to your questions at the training.