JIMS 2

Common Supervision

Administer Suggested Order (ASO)

User Guide for CSOs and CLOs

Version 2.0

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JIMS2 – Community Supervision

Overview

Introduction

The JIMS2 Community Supervision system allows authorized users to create and maintain supervision records for defendants in Harris County.

This user guide explains the concepts, processes and user roles defined for the Community Supervision System and also provides authorized users with the step-by-step procedures used to:

- Create and update suggested order templates using standard and non-standard conditions of supervision

Table of Contents

This manual contains the following topics:

System Concepts, Processes and User Roles

Introduction   This training module contains is designed for all Community Supervision staff members. It explains the concepts, processes and user roles defined for the Community Supervision System.

Audience   Any Community Supervision staff member who needs to understand what the JIMS2 Community Supervision system will be used for and who will use it.

Objectives   After completing this module participants will understand the JIMS Community Supervision System including:
- Who will use the system
- What the system does now and what will be added
- The basic processes that the system automates

A suggested order is simply a template with standard and non standard conditions filled in that will be used by CLOs to create the supervision conditions ordered by the court for a defendant. Suggested order templates can be created for a specific court or for a specific offense or both.

Types of Conditions

Manage Supervision Options (MSO)
Project Analyst participants will create all standard and non-standard conditions used by Harris County CSCD. Court and department policies used to determine non-compliance related activities will also be created and associated to conditions as appropriate.

Administer Suggested Orders (ASO)
Court Services Supervisors and Court Liaison Officers will utilize the supervision conditions, court policies and department policies created by the Project Analyst to create sample suggested order templates.

NOTE: ASO provides court-facing officers with templates to use as a starting point to create supervision orders based on offense and/or court requirements. The function of creating the supervision order, referred to as Process Adult Supervision Order (PASO), will be tested in a later release of the Common Supervision application.

Administer Suggested Order

Introduction

This training module will cover the JIMS2 functionality that court liaison officers (CLOs) will use to create suggested orders.

As conditions and requirements change, the CLO must update their suggested order templates to reflect these changes. A color-coded indicator will notify the CLOs when a condition is no longer active or is no longer available for the assigned court.

What is a Suggested Order

A suggested order is simply a template with conditions filled in that will be used by CLOs to create the supervision conditions ordered by the court for a defendant. Suggested order templates can be created for a specific court or for a specific offense or both.

Audience for this Training Module

The audience for this training module is Court Liaison Officers (CLOs) in the Community Supervision and Corrections Department.

Module Objectives

After completing this module, participants will be able to:

- Log in to JIMS2
- Understand how supervision conditions are associated to department policies and court policies.
- Search for and view existing suggested order templates
- Create a suggested order template
- Copy an existing suggested order template to use to create a new suggested order template
- Modify a suggested order template
- Delete a suggested order template

URL for JIMS2 Production Region

The following web address is where the production version of the JIMS2 Community Supervision application is located:
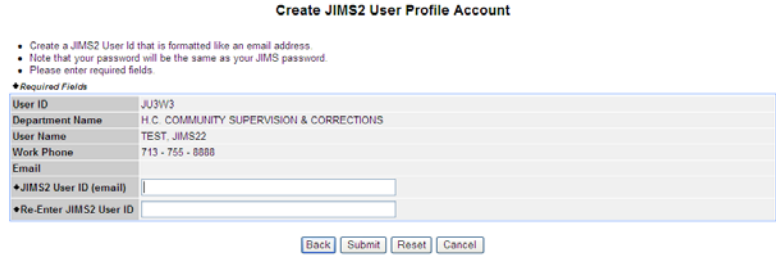http://www.jims2.hctx.net/appshell/jsp/login.jsp

NOTE: In the training session we will use the training version of the JIMS2 Community Supervision application located at the URL indicated in the procedures below.

Administer Suggested Order, Continued

Login to JIMS2 Follow the steps below to log in to JIMS2 for the first time.

Step	Action
1	Access http://tr.jims2.hctx.net/appshell/jsp/login.jsp

REMEMBER: The above URL is for the training region we will be using in this class. Use the URL in the previous section to log in to the Production region for the first time. |
| 2 | Enter your JIMS logon ID and password.

 |
| 3 | Click **Submit.** The **Create JIMS2 User Profile Account** page will display.

 |
| 4 | Type in a **JIMS2 User ID (email)** and type it again in the **Re-Enter JIMS2 User ID** field for verification.

NOTE: The JIMS2 user ID that you create must be in the *format* of an email address, but it does not have to be a valid email account. For example, you could use john@jims.net, JohnSmith@yahoo.com or JUXXX@jims.net. |

Administer Suggested Order, Continued

Login to JIMS2
(continued)

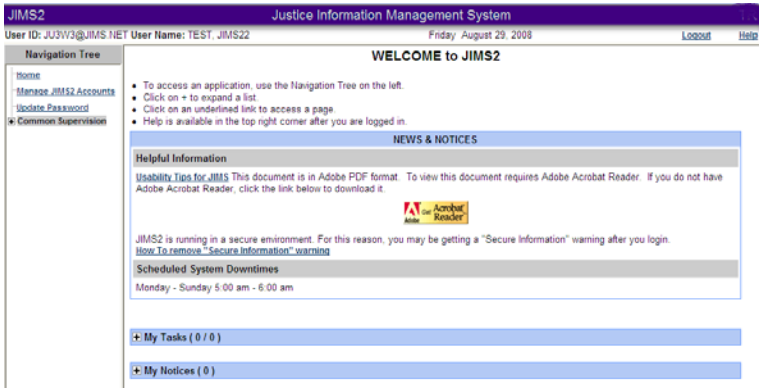| Step	Action
5	Click **Submit**. The **Create JIMS2 User Profile Account Summary** page will display. Create JIMS2 User Profile Account Summary • Verify that information is correct and select Finish button to create new JIMS2 account. Department: H.C. COMMUNITY SUPERVISION & CORRECTIONS User Name: TEST, JIMS22 Work Phone: 713-755-8888 Email: JIMS2 User ID: ju3w3@jims.net [Back] [Finish] [Cancel]
6	If all the displayed info looks correct click **Finish**. The **Create JIMS2 User Profile Account Confirmation** page will display with a confirmation message.. Create JIMS2 User Profile Account Confirmation The following JIMS Account has been successfully created Department: H.C. COMMUNITY SUPERVISION & CORRECTIONS User Name: TEST, JIMS22 Work Phone: 713-755-8888 Email: JIMS2 User ID: ju3w3@jims.net [Back to Login] **NOTE:** You have just created you new JIMS2 user ID. You will use this ID every time you log in to JIMS2. Remember, however, that we are currently login in to a Training region. When you log in to the JIMS2 Production region for the first time, you will have to perform these steps again.
7	Click **Back to Login.** The Welcome to JIMS login page will display. Your new JIMS2 User ID will be already be filled in. Friday August 29, 2008 JIMS2 WELCOME TO JIMS2 JIMS2 Account created successfully. Please login with your JIMS2 User ID • Required Fields About Help JIMS2 Log In •User ID: ju3w3@jims.net •Password: [Submit] [Reset]

Administer Suggested Order, Continued

Login to JIMS2
(continued)

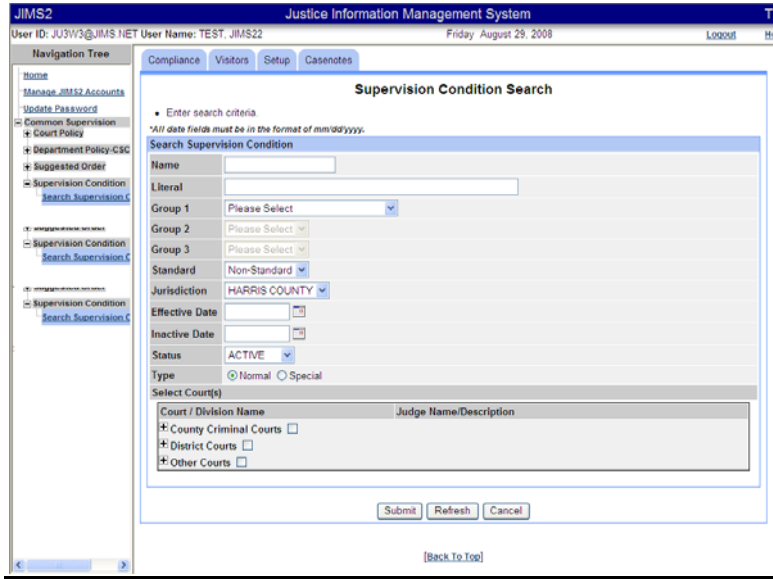| Step	Action
8	Type in your Password. **NOTE:** The password is the same as your old JIMS password. If you forget your password you must contact your project analyst or the ITC Help Desk to reset your password. When you change your password you must do this in the mainframe system. Once you change your password in the legacy system you can log into JIMS2 with your new password.
9	Click **Submit.** The **Welcome to JIMS2** page will display.

Administer Suggested Order, Continued

Search/View Conditions and Policies

The creation of department policies and court policies and the association of policies to specific conditions are implemented by the administrative staff of the Community Supervision and Corrections Department. CLOs will not access the system to perform these functions.

It is important, however, for Court CLOs to have a good understanding of the supervision conditions, department policies, and court policies that exist as well as how those policies are associated to supervision conditions in order to more effectively create suggested orders.

Follow the steps below to search for and view a specific **standard condition** and the court policies and departmental policies associated to it.

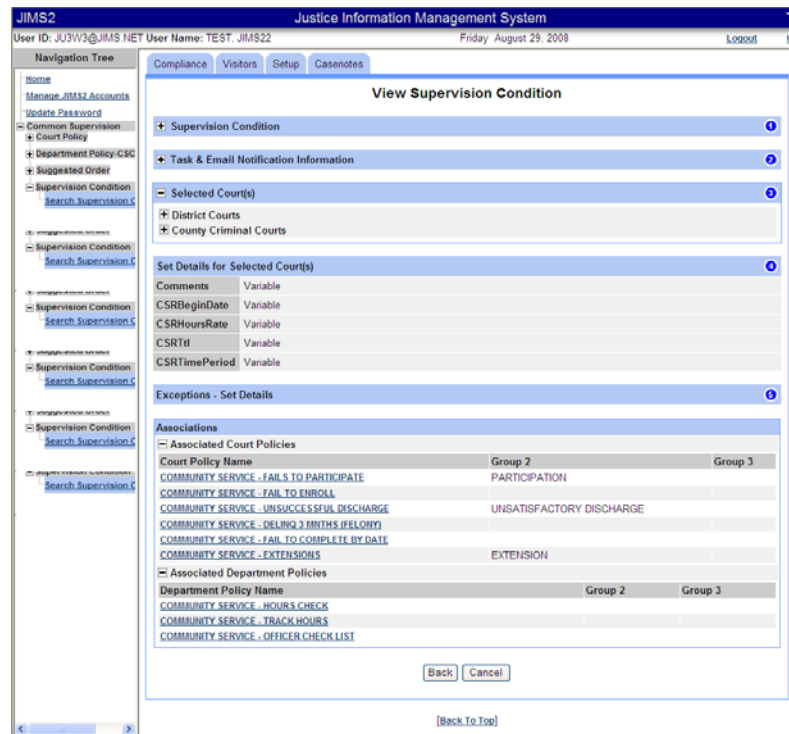| Step	Action
1	Expand the **Common Supervision** link in the left navigation tree.
2	Expand the **Supervision Condition** link
3	Click **Search Supervision Conditions.** The following screen will display.
4	In the **Name** field type **CSR Program.**
5	For the field labeled **Standard** select Standard from the drop-down list provided.

6	Click **Submit.** The **Supervision Condition Search Results** screen will display.
7	Click the condition name **CSR Program**. The **View Supervision Condition** screen will display.
8	Click the + next to the **Supervision Condition** section of the screen to display the details of the supervision condition.
9	In the **Associations** section of the screen, click on the **Court Policy Name**, **COMMUNITY SERVICE – UNSUCCESSFUL DISCHARGE** The **View Court Policy** screen will display. Click the + sign next to each section to display the details for that

	section. Notice that the associated condition for this court policy is the **CSR PROGRAM**
10	Click on the Condition Name **CSR PROGRAM** to return to the **View Supervision Condition** screen.
11	In the **Associations** section click on the **Department Policy Name,** **COMMUNITY SERVICE – HOURS CHECK** The **View Department Policy** screen will display. **NOTE:** In the **Associated Conditions** section of the screen, there are two conditions associated to this policy – one is the condition we originally searched, CSR Program, and the other is the same condition but is specific to the 182nd. Project Analyst in the Information Service Division of CSCD will create all standard and non-standard conditions used by Harris County CSCD. Court and department policies will be used to determine non-compliance related activities and will be created and associated to conditions as appropriate.

Administer Suggested Order, Continued

Search/View Existing Suggested Order Templates

You can search the existing suggested orders to see if any meet the criteria you want to include in a new order you are trying to create. You can then copy and modify any suggested order to create a new order with many or all of the same conditions.

Also, from time to time conditions and policies may change, so CLOs must search for and view their suggested order templates to see if any updates are necessary.

Follow the steps below to search for and view the details of an existing suggested order:

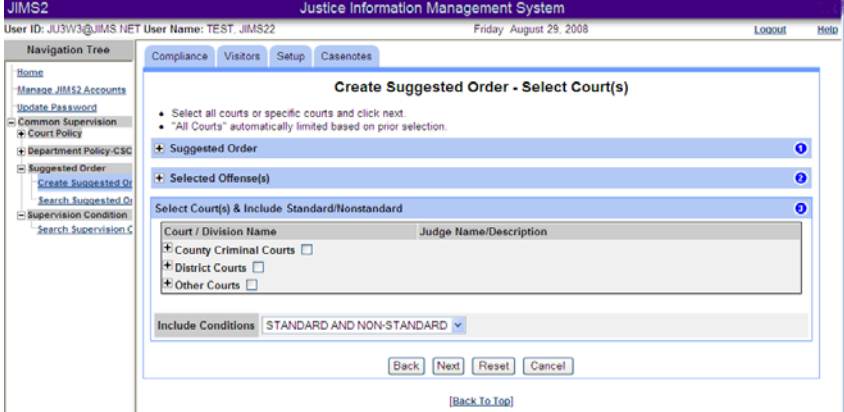| Step	Action
1	Under Community Supervision in the left navigation tree expand **Suggested Order**.
2	Click **Search Suggested Order**.
3	In the name field type 182 * **NOTE:** The * is a wild card that will expand your search by finding the letters you type in the exact order you type them followed by anything else.
4	Click **Submit.** The **Suggested Order Search Results** will display and you can select a Suggested Order Name and the **View Suggested Order** page will display. If there is only one search results the **View Suggested Order** page will display.
5	View the suggested order. **NOTE:** In the section of the screen titled **Set Supervision Condition Suggested Order** you can scroll to view all the conditions associated with the displayed suggested order. A condition is highlighted in red to notify the CLO when a condition is no longer active OR a condition may be highlighted in yellow to indicate that it is no longer in use for the assigned court. CLOs must routinely review and update their suggested order templates to ensure they are up-to-date.

Administer Suggested Order, Continued

Create a Suggested Order Template

The first suggested order template that you create should be very generic so that you can use it to copy from to create new suggested order templates when necessary.

Follow the steps below to create a generic suggested order template that you will be able to use time and again to create new templates.

Step	Action
1	Click the + sign next to **Common Supervision** in the left navigation tree. Then click the + sign next to **Suggested Order**. Finally, click **Create Suggested Order**.
2	Create a generic suggested order for your assigned court using the following criteria: For the **Suggested Order Name** use: *182 – Offense – Template* For the **Suggested Order Description** use: *Basic Suggested Order for CRT (insert your court #)* **VERY IMPORTANT NOTE:** When creating a Suggested Order, always use the same naming standard: *court – offense – description*.
3	Click **No Offenses**. The **Create Suggested Order – Select Court(s)** screen will display. **REMEMBER**: We are first going to create a very generic template with standard conditions that will apply to ALL offenses. In later exercises, we will copy this suggested order, and then

	modify the copy to include specific offenses.
4	Expand the appropriate court section by clicking the plus sign next to county criminal courts, district courts and/or other courts.
5	Select your court by checking the appropriate box.
6	The **Include Conditions** drop-down menu defaults to STANDARD AND NON_STANDARD. **Leave this default value.** **NOTE:** Right now you are just going to create a generic order with only standard conditions. However, because you may want to copy and then modify this order to also include non-standard conditions in the future, you must select the option that includes both Standard and Non-Standard. Once you set this parameter it cannot be changed.
7	Click **Next.** The **Create Suggested Order – Select Nonstandard Conditions** page will display. **NOTE:** You can click the + sign next to Suggested Order, Selected Offense(s) and the Selected Court(s) sections to view the details entered for these sections.

Create a
Suggested
Order
Template
(continued)

Step	Action
8	Click **Next** to skip the displayed **Create Suggested Order – Select Nonstandard Conditions** page. The **Create Suggested Order – Condition Sequence** page will display. **Remember:** You want to first create a very generic template with only standard conditions. We will add some non-standard conditions to a suggested order later. All standard conditions used by CSCD are automatically added to EVERY suggested order and cannot be removed. The CLO can only add/remove conditions that are designated as NONSTANDARD, or those conditions that do not appear on all supervision orders.
9	Use the blue arrows next to the listed standard conditions to reorder them correctly. Refer to Appendix B to view the correct order for the standard conditions. **NOTE**: You will only have to reorder the standard conditions one time. For subsequent suggested order templates that you create, you will copy this suggested order and add offenses and non-standard conditions to it to create additional specific suggested order templates. Any nonstandard condition that you add to copies of this order will appear at the end of the standard conditions.
10	Click **Preview Order** to view the order template as it will display on a supervision order. The Preview will open in a separate window that can be closed after viewing.
11	Click **Next.** A summary of the standard conditions will display in the order you designated. Review this for accuracy.
12	Click **Finish** to create the suggested order. A confirmation message will display.

Administer Suggested Order, Continued

Copy a   Once you create a basic suggested order template for your court, you can then

Suggested Order Template

copy that template time and time again to create additional suggested order templates.

Most courts will use basic templates. In fact, for many courts the templates may be the same for certain offenses, but to keep things simple each court will create the basic templates for their court so that floaters who come in the court can search for the template by the court number to be certain they are using the template specified by that court.

Follow the steps below to create a new suggested order template by copying and then updating the basic template you already created.

Step	Action
1	Click **Back To Search** to search for the suggested order you just created.
2	Type in the Name of the order you created
3	Click **Submit.**
4	Click **Copy.**
5	Change the Name and Description to the name you want to create.

6	Click **Update Offenses.**
	
	In the **Search for Offenses section** Use any combination of fields to search for offense to be included on the suggested order.
	For example,
	  1. In the **Offense Literal** field, type the search criteria **DWI.**
	  2. Click **Submit** to display all DWI offenses. **NOTE:** You can also use the **Level** field to restrict the search results to just **Felony** or **Misdemeanor** (based on your assigned court) using the drop-down list.

7	Select the checkbox for all offenses you wish to include on the suggested order. Click the **Add Selected** button. **Remember:** The offense on the order must match the offense that the defendant is sentenced to when you go to Process Adult Supervision Order. So you will want to select more than one DWI offense if this suggested order will apply to more than one type of DWI.
8	Click the **Add Selected** button. **Remember:** If the offense on the order must match the offense

	that the defendant is sentenced to when you go to Process the Adult Supervision order. So you will want to select more than one DWI offense if this suggested order will apply to more than one type of DWI.
9	Click **Next.**
10	From the **Select Court(s)** page, you can change the selected courts or leave them the same.

**Copy a
Suggested
Order
Template**
(continued)

Step	Action
11	Click **Next.**
12	To add non standard conditions to this order, search for non-standard conditions using any combination of fields in the section titled **Search Nonstandard Supervision Conditions**. For example, you can search for the specific **Condition Name** *Liability Insurance* or you can search for nonstandard condition by selecting a **Group 1** choice like ALCOHOL/DRUGS from the drop-down menu provided.
13	Click **Submit** once you enter your search criteria.
14	Select this nonstandard condition to be added to this suggested order by clicking in the checkbox next to each condition to be added.
15	Click **Add Selected.** Repeat steps 10-13 until you have searched for, found and added all desired non-standard conditions to this order. **NOTE:** Once a condition has been added it appears in the Selected List and can be removed if necessary by clicking the Remove link to the left of the condition. **Remember:** In addition to standard and non-standard conditions, some defendants will be given supervision orders from the courts that include special conditions. Specials conditions will be added later when you use the suggested order template to Process the Adult Supervision order.
16	Click **Next.**
17	Use the blue arrows next to the listed conditions to reorder the conditions. **NOTE:** All of the standard conditions appear first in the order you placed them in on the template you copied from and they are denoted by the letter S. The non-standard conditions appear after the standard conditions and are denoted by the letters NS. You may have to reorder the NS conditions.
18	Click **Next** to view the summary page before saving the suggested

	order.
19	Click **Finish** to save the Suggested Order.

Administer Suggested Order, Continued

Modify a Suggested Order Template

Follow the steps below to modify a suggested order template

Step	Action
1	Click **Back To Search** to search for the suggested order you just created.
2	Type the name you created in the previous section in the Name fields.
3	Click **Submit.**
4	Have students proceed through the screens to modify the offenses included on the suggested order to THEFT.

Continued on next page

Administer Suggested Order, Continued

Delete a Suggested Order Template

A suggested order template that is no longer needed can be deleted.

Follow the steps below to delete a suggested order template

Step	Action
1	Click the **Search Suggested Order** link under **Common Supervision** in the left navigation menu**.**
2	Type in the Name of the suggested order you created in the previous section.
3	Click **Submit.**
4	Click **Delete.**
5	Click **Finish** to verify the deletion. The **Delete Confirmation Order – Confirmation** page will display.