OFFICE OF THE DEFENDER GENERAL

CASE MANAGEMENT SYSTEM

JustWare Defender

How to Create a Family Case Record

This guide walks you through creating a Family Case Record in JustWare Defender

All users should be familiar with the JustWare 101 guide and How to Create a Name Record.

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Table of Contents

Search	3
Create Name Record if necessary	3
Agency/People	5
Involve People	7
If the Involved Person Does Not Belong to an Agency	7
This is Where you Add Family Members	7
Searching Juvenile Initials	8
If the Involved Person Belongs to an Agency	9
Court Tab	11
Petition Tab	12
Disposition	13
Lesser Offense	14
Events Tab	15
Communications Tab	16
Notes Tab	16
Tasks Tab	17
Docs Tab	18
Discovery Tab	20
Specialty Court Tab	20
Immigration Tab	21
Med/Health Tab	22
Edu/YS Tab	23
Records Tab	23
Flags Tab	24
Related Cases Tab	25
Property Tab	25
Reports, Case Summary	25

How to Create a JustWare Case Record (Family)

A Juvenile case is entered under the juvenile's initials.

Search for the initials of the juvenile for whom you are creating a new case.

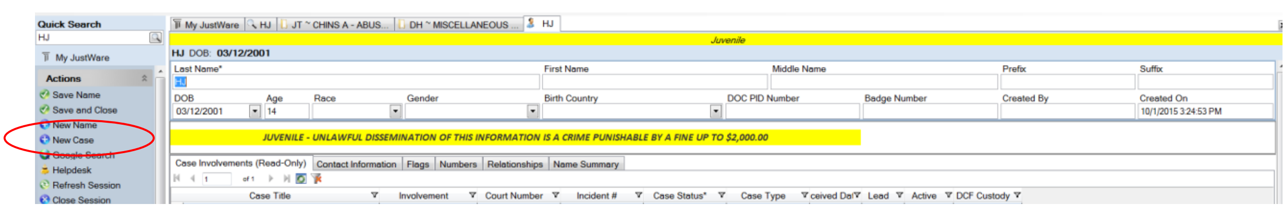
- **Use Name Search (under Search section)** (NOTE: you will see fields on this screen that we are not using)
- **Fill in juvenile's initials in Last Name**
- **Fill in Date of Birth (DOB)**
- **Press Enter or click on Actions, Search**

If the name is not found, you will receive the following screen:

You need to first create a juvenile name record (see How to Create a Name Record)

Once the name record exists:

- **Click Actions, New Case**
- **Choose Family Case Type from the dropdown**



Case types are:

- Criminal
- Family
- PRO – General
- PRO – Litigation
- Special

Note: once you have opened one case, you can add another case of the same type by choosing **Actions, Add New Case Same Type**.

The new Family Case screen will open, with Status highlighted:

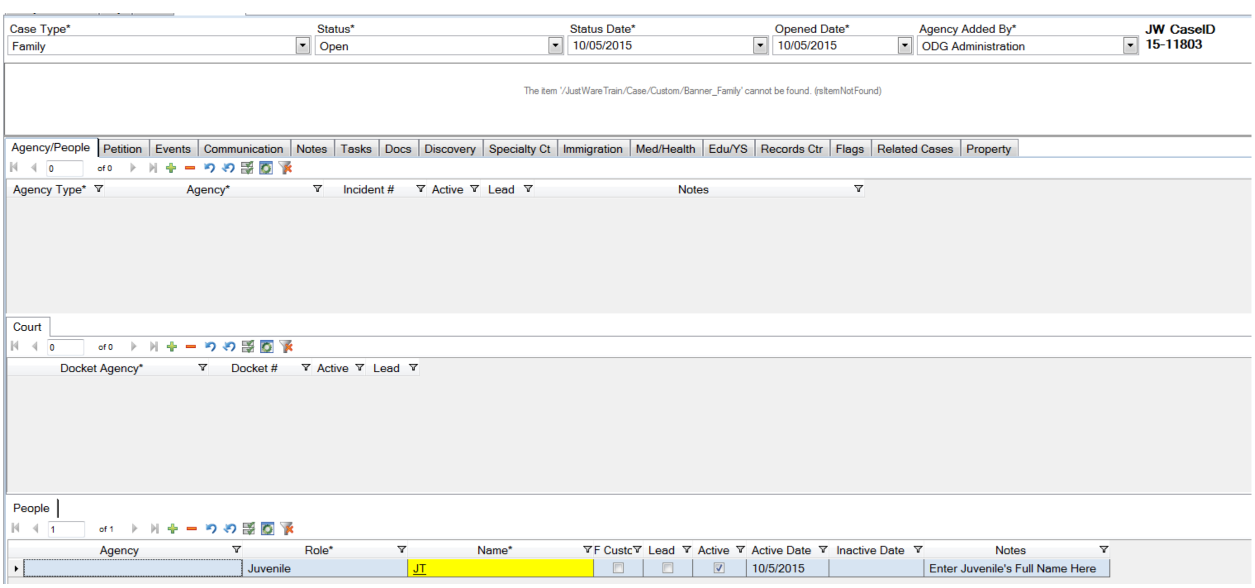
Required fields are starred.

Some fields are populated automatically when the case is saved:

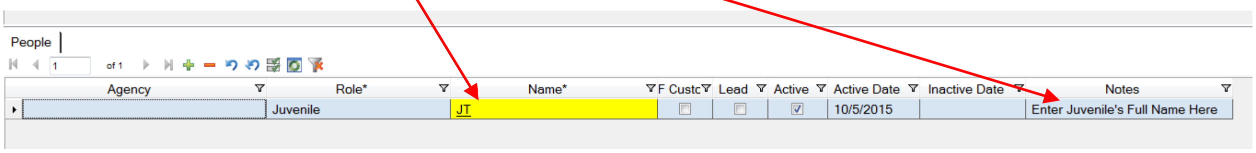
- Status date
- Received Date (will be changed to Opened Date)
- Agency Added By

Note: a primary involved person (client) must be added in the **Agency/People** tab before the record can be saved.

Family case screen:



Note: If you open a case with the juvenile's name record screen being active, the Status defaults to Open, and as soon as you save the case record, the juvenile's initials are automatically filled in the People tab. You should put the juvenile's full name in the Notes field as shown below.



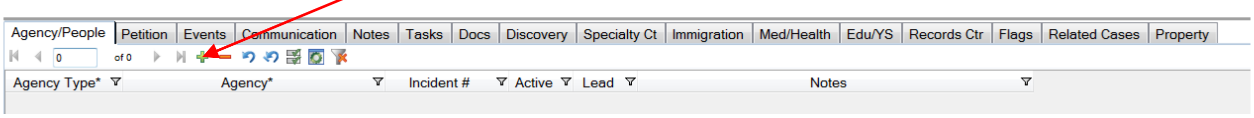
- **Save the record**
  - **File, Save Case, or Actions, Save Case, or**
  - **Press Ctrl-S**
- **Continue entering case information:**

Agency/People

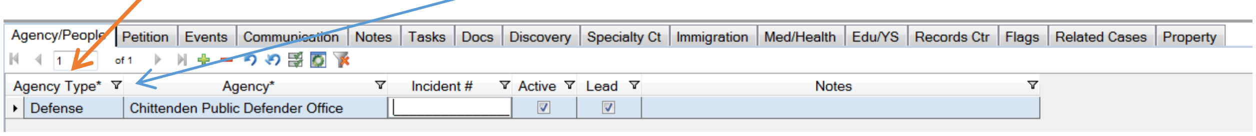
Note: You must involve the agency before involving a person who is a member of an agency, by adding the agency and saving the case.

To Involve an Agency:

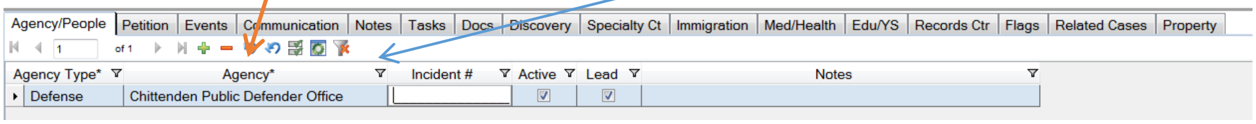
- **Click on the Agency/People Tab**
- **Click the green plus sign ( ) to add a line** (the red minus sign deletes a line)



- **Choose Agency Type from the dropdown on the new line, or type first letter of name of the Agency Type** (do not click on the filter button ( ); if you choose something from the filter button, you will only see that specific line; i.e., defense, and you would not see the Prosecutor and Law lines).



- **Choose Agency from the dropdown on the new line, or type first letter of the name of the Agency** (do not click on the filter( ))



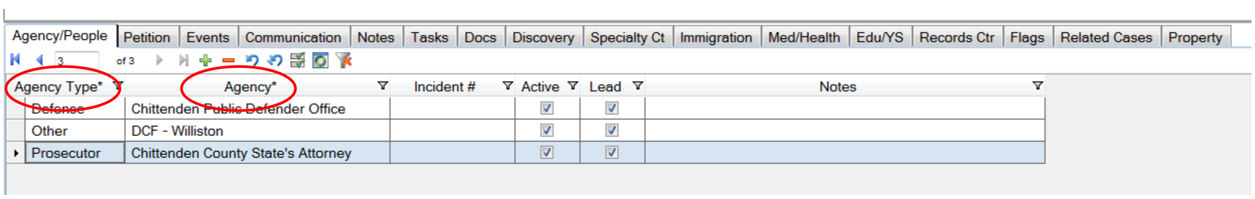
Note: The Agency Types are set to Defense, Law, Other and Prosecution. Enter DCF under Other.

Active and Lead are automatically checked (you can uncheck them)

You can add an incident number, i.e., police department number, if you have it.

Continue adding agencies.

The **Agency/People** tab with the public defense office, state's attorney's office and DCF added:



Save the record

- **Click File, Save Case, or Actions, Save Case or**
- **Press Ctrl-S**

Continue entering case information

Involve People on the People Tab

If the involved person does not belong to an agency and is one of the following **Roles**, **Agency** is left blank and **Role** is required. The following is NOT a comprehensive list of the roles that may be entered.

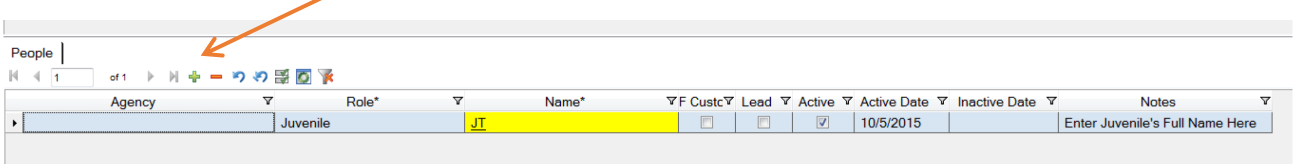
- Client (NOT JUVENILE)
- Co-defendant
- Complainant
- Expert
- Father
- Father's Attorney
- Foster Parent
- Grandparent
- Guardian Ad Litem
- Mother
- Relative
- Victim (Alleged)

Note: the client (the primary involved person) must be added in this tab before the record can be saved. If you created a new juvenile client, and then clicked on Actions, New Case, the juvenile is automatically entered in the People tab. If you represent someone other than the juvenile, you need to add a person under Client (NOT JUVENILE).

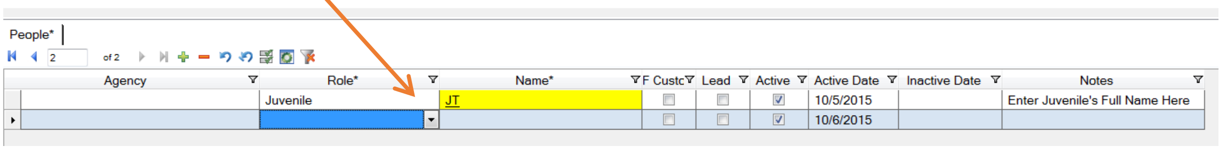
This is where you add family members and identifying juvenile information, NOT in the juvenile name record.

We recommend that you add the client's name here first, save the record (**File, Save Case**, or press **Ctrl-S)**, and then add **Agency** information, so that you do not lose any work.

- **Click the green plus sign ( ) to add a line** (the red minus sign deletes a line)



- **Click the Role dropdown and choose the role or type the first letter of the role in the field and press Tab or Enter**



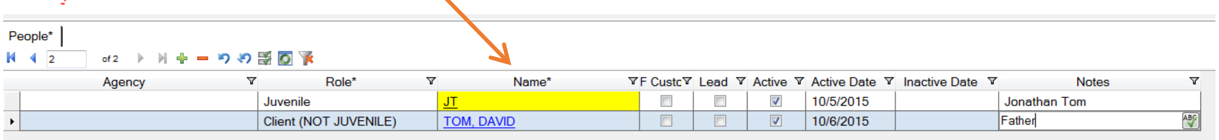
People*

of 2

	Agency	Role*	Name*	F Custc	Lead	Active	Active Date	Inactive Date	Notes
		Juvenile	JT	☐	☐	☑	10/5/2015		Enter Juvenile's Full Name Here
▸				☐	☐	☑	10/6/2015		

In the Name field either type the person's name and press Tab or Enter, or click on one of the search buttons to search for the name.

- If the name is found, click on the name and it is added to the current record.
- If the name is not found, create a new name record: under **Actions,** click **New Name**. Complete the name record (as indicated in Create a New Name). Then click on the name to add it to the current record.



People*

of 2

	Agency	Role*	Name*	F Custc	Lead	Active	Active Date	Inactive Date	Notes
		Juvenile	JT	☐	☐	☑	10/5/2015		Jonathan Tom
▸		Client (NOT JUVENILE)	TOM, DAVID	☐	☐	☑	10/6/2015		Father

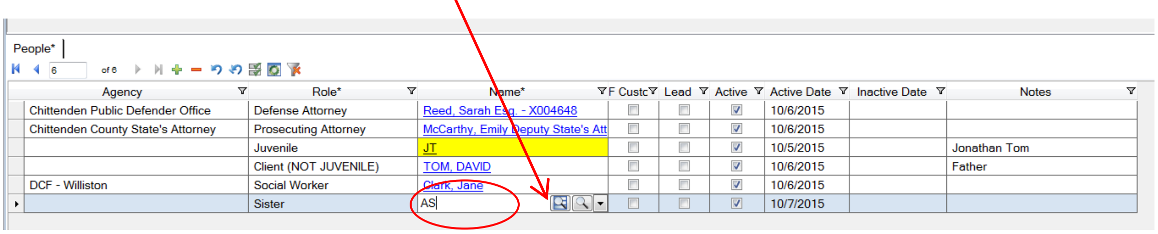
Searching Juvenile Initials

If the name is a juvenile, you need to search using the juvenile's initials. Initials that seem to comprise a word, or are used in code, are not being accepted (i.e., AS, OR, TO, IT, ON).

What you need to do to enter the initials:

- **Choose the Role**
- **Click in the Name field**
- **Type the initials (AS)**
- **Click on the Name Search icon (first icon)**

This will show you to a list of all juveniles with those initials.

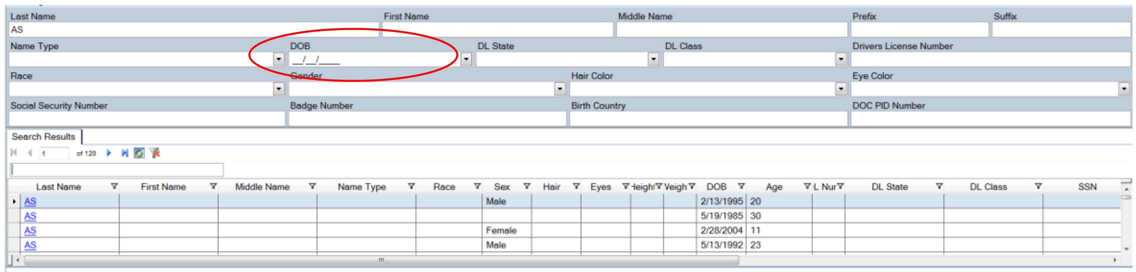


People*

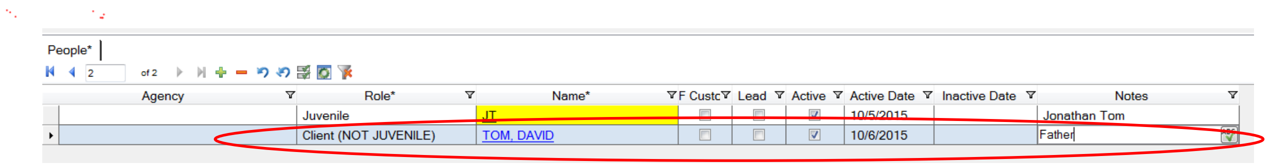
6 of 6

	Agency	Role*	Name*	F Custc	Lead	Active	Active Date	Inactive Date	Notes
	Chittenden Public Defender Office	Defense Attorney	Reed, Sarah Esq. - X004648	☐	☐	☑	10/6/2015		
	Chittenden County State's Attorney	Prosecuting Attorney	McCarthy, Emily Deputy State's Att	☐	☐	☑	10/6/2015		
		Juvenile	JT	☐	☐	☑	10/5/2015		Jonathan Tom
		Client (NOT JUVENILE)	TOM, DAVID	☐	☐	☑	10/6/2015		Father
	DCF - Williston	Social Worker	Clark, Jane	☐	☐	☑	10/6/2015		
▸		Sister	AS	☐	☐	☑	10/7/2015		

Narrow your search by entering the juvenile's date of birth (DOB) in the **Name Search** Screen:



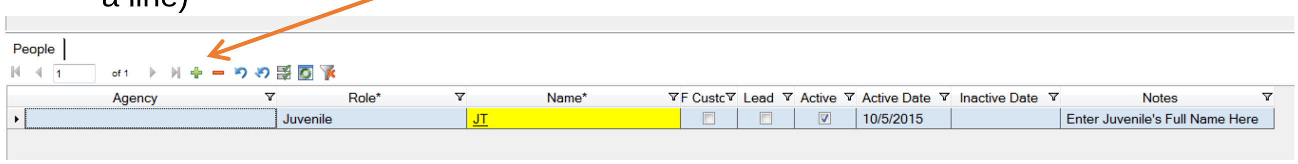
People tab with Client (NOT JUVENILE) added:



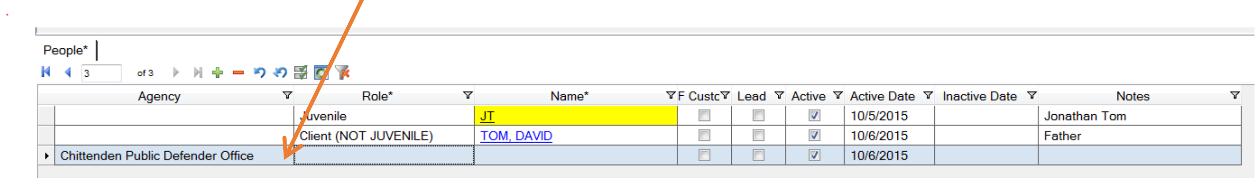
Involve People on the People Tab

If the involved person belongs to an agency, you must enter the agency first, under **Agency** (see above), save the case, and then in the **People** tab:

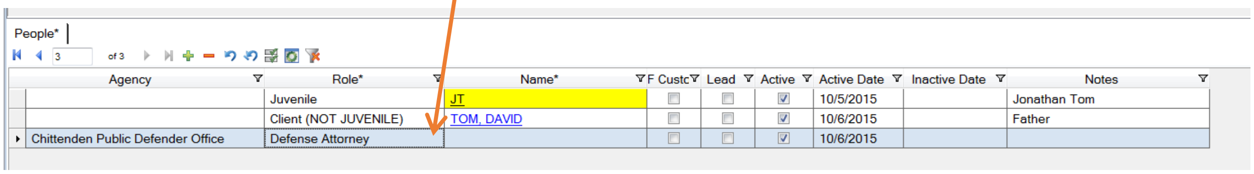
- **Click the green plus sign (✚) to add a line** (the red minus sign deletes a line)



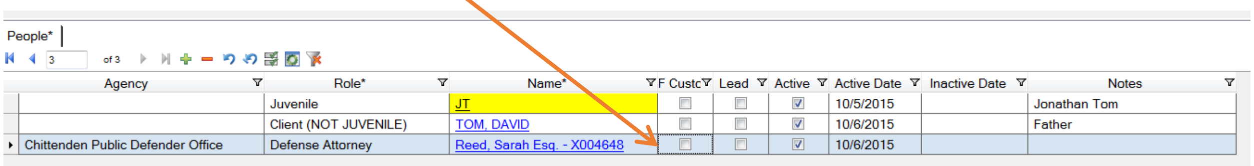
- **Click the dropdown in Agency and choose the appropriate agency, or start typing the name of the agency and press Tab**



- **Click the dropdown in Role and choose the appropriate role, or type the first letter of the Role and press Tab**



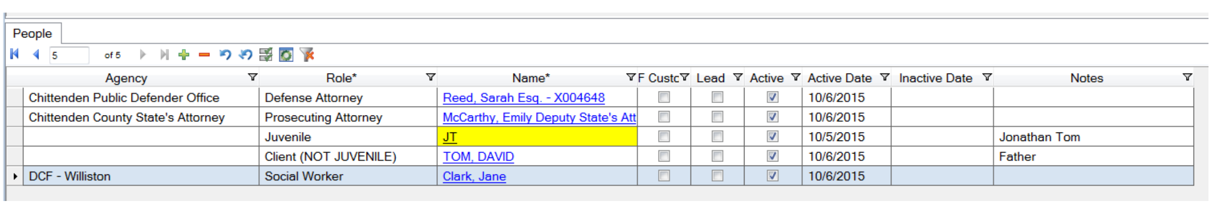
- **Click the dropdown in Name and choose the appropriate name, or type the first letter of the Name and press Tab**



You can check and uncheck Lead and Active

Be careful not to click on Filter ( ) by mistake when you are filling in information in these areas.

The **People** tab with juvenile, client (NOT JUVENILE),defense attorney, state's attorney and DCF added:



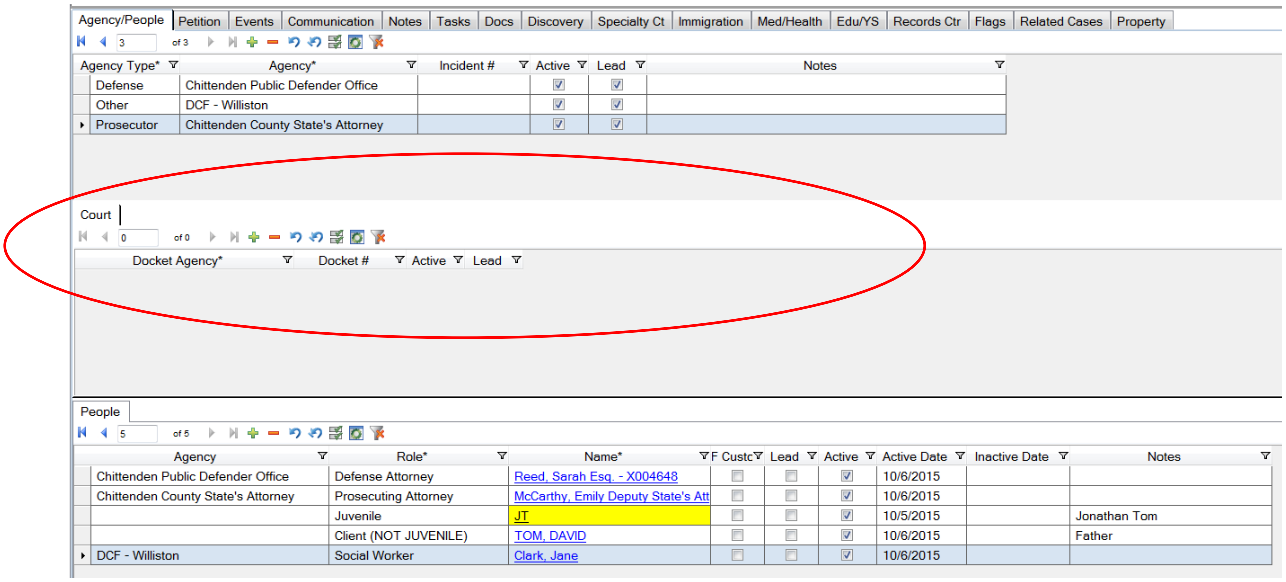
Save the case:

- **Click File, Save Case, or Actions, Save Case or**
- **Press Ctrl-S**

Continue entering case information

Court Tab

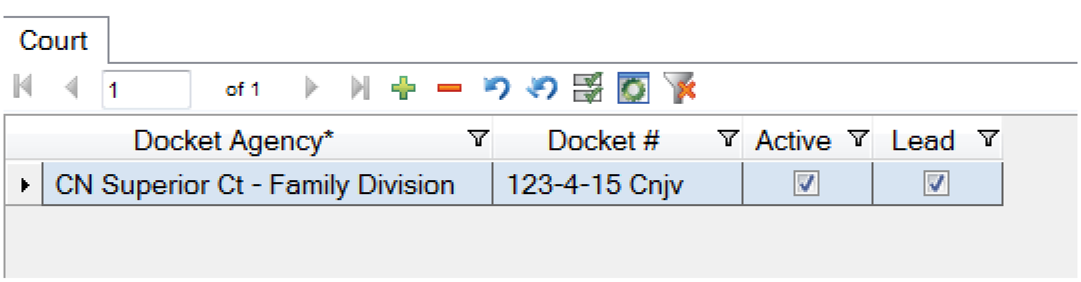
The **Court** tab is where you enter the docket number of the case.



Docket number should be entered in the format 123-4-15 Cnjv. Note: you must make sure to put a check mark in the **Lead** docket number line. Also, you must enter the docket number in this format for it to be found in a **Case Quick Search**.

- **Click the Green Plus sign**
- **Docket Agency dropdown – choose court**
- **Type Docket #**

Court tab with docket number added:



Save the case:

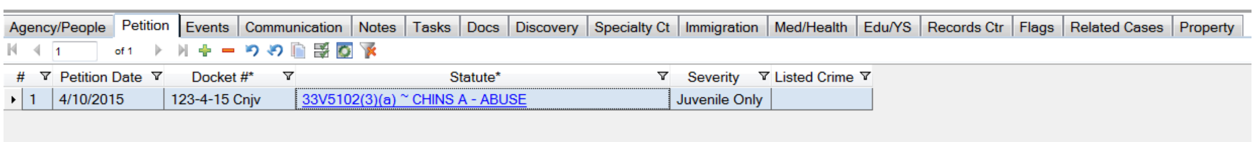
- **Click File, Save Case, or Actions, Save Case or**
- **Press Ctrl-S**

Petition Tab

- **Click Green Plus sign to add row**
- **Enter petition date (if known)**
- **Choose Docket # from dropdown** (comes from the Court section, after case has been saved)
- **Enter the statute** (you can start typing the name of the charge and press enter or tab; use the Statute Search, or Quick Search buttons) or use the short code (CHINSA) and tab

Depending on the search you use, you may need to click **Use Statute** from the left menu. (See **JustWare 101, Search for Statute** for more detail.) Note: The **Severity** will be automatically entered

The petition tab with one charge added:



Save the case:

- **Click File, Save Case, or Actions, Save Case or**
- **Press Ctrl-S**

Note: You must save the case after entering the charge, before you can enter disposition, or you will receive an error message.

The charge is automatically entered under the **Admit/Deny and Trial** tab.

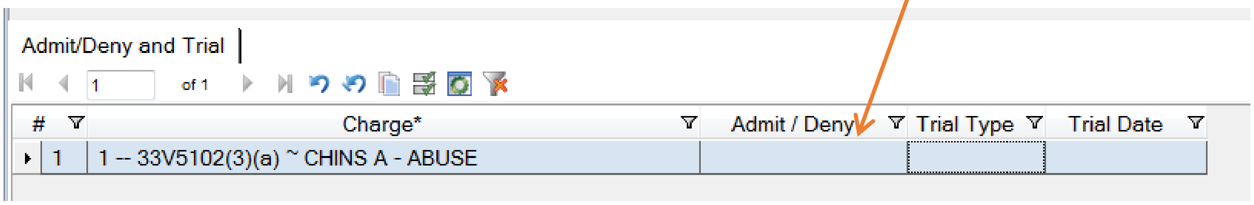
If you have several counts of the same thing to enter, you do not need to add a new line for each, but you can use the **Copy Record** feature, on the Tab (Snap-in) Toolbar, select the line to copy, enter the number of copies, and then click **Actions, Copy**.

Save the case

- **Click File, Save Case, or Actions, Save Case or**
- **Press Ctrl-S**

<u>Disposition</u>

Admin/Deny is entered on the same line as the charge in the Admit/Deny field (from the dropdown).



If a **Conflict of Interest** results in **Partial Representation**, complete the **Disposition** tab, and enter **Conflict of Interest** under **Flags**.

Disposition

- **Add a line. The charge will auto-populate.**
- **Enter the date, unless it's the current date.**
- **Choose the type from the dropdown:**
  - Charge Amended
  - Community Service
  - Conditional Custody
  - Conditional Custody Vacated
  - Continued DCF Custody
  - Custody NOT DCF--ID who in the note
  - DCF Custody
  - DCF Custody Vacated
  - Dismissed by Court
  - Dismissed by Prosecutor
  - Diversion
  - Juvenile Reparative Board
  - Other
  - Partial Representation
  - Permanent Guardianship
  - Petition Withdrawn
  - Probation Continued
  - Probation Discharged Satisfactory
  - Probation Discharged Unsatisfactory

- Probation Juvenile
- Protective Supervision
- Record Sealed
- Restitution
- Restorative Justice
- TPR
- Youthful Offender

- **If there is more than one type of disposition (such as DCF Custody and Record Sealed), enter each type separately.** Use **Copy Record** from the Tab (Snap-in) Toolbar to copy the line for one or more new lines.
- **Enter money amounts (Fine, Restitution) in the $ Amount $ column.**
- **For Partial Representation, enter the reason in Notes**

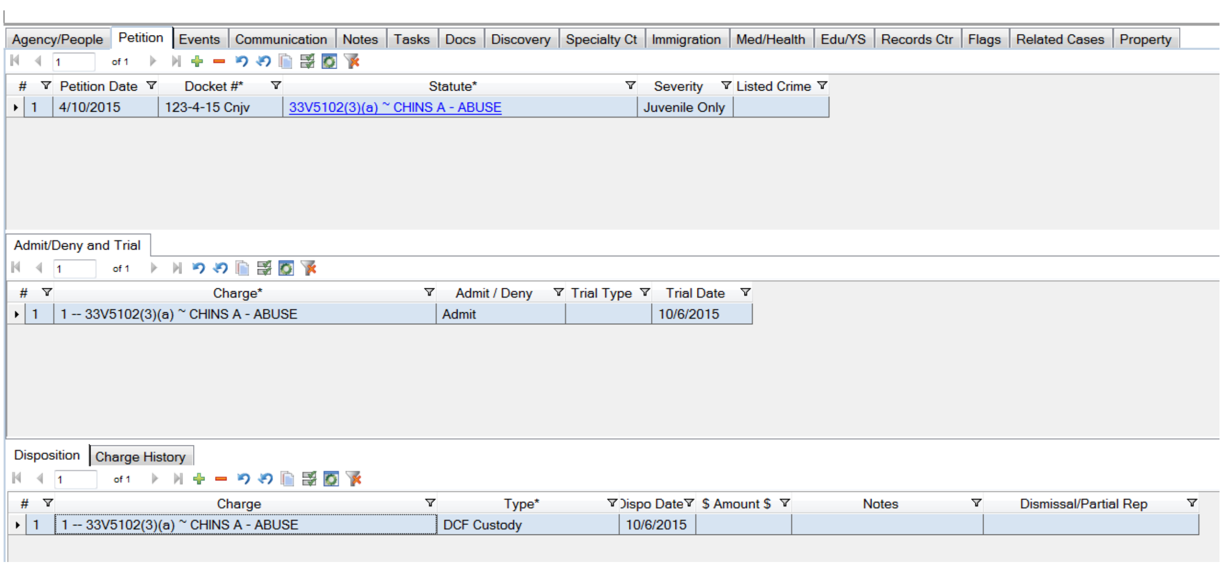
Lesser Offense

If the disposition is on a lesser offense:

- Change the charge in the **Petition** section.

The original charge will be automatically added to **Charge History**.

The **Petition** tab with **Admin/Deny and Trial and Disposition** entered:



Events Tab

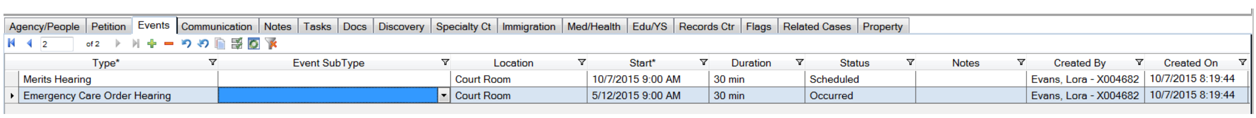
Court hearings, depositions, and any other events can be entered. You may enter people in **Event Involved People**, at the bottom of the **Events** screen, and you may set up a reminder. If a person is added as an **Event Involved Person**, the event will be added to the person's **My JustWare Calendar**.

Note: You must add the initial hearing as an event under this tab.

To add an event:

- **Click Green Plus sign to add row**
- **Enter Type (from dropdown)**
- **Enter Location (from dropdown)**
- **Enter Start date (arrow over to each section)**
- **Enter Status (from dropdown)**
- **If the Type is Arraignment, enter the Bail Amt**

Event tab with Emergency Hearing and Merits Hearing added:



Permanency reviews and other hearings that are scheduled post-disposition must be entered as **Events.**

Communications Tab

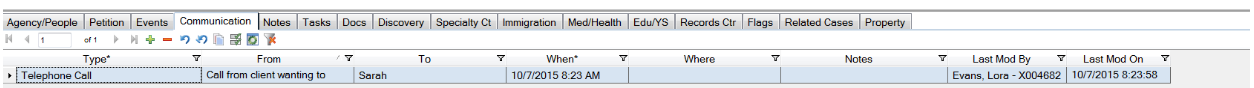
You can track various communications (email, in person, letter, telephone call, text message).

To add a communication:

- **Click Green Plus sign to add row**
- **Enter Type (from dropdown)**
- **Enter From, To, and Note (all text fields)**
- **The date and author auto fills**

Note: You will not be able to enter anything in the **Where** field unless the communication is a meeting.

Example:



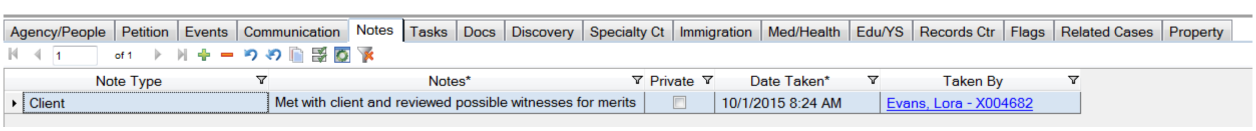
Notes Tab

This section allows you to enter various types of notes, and notes can be marked private to be seen only by you.

To add a note:

- **Click Green Plus sign to add row**
- **Enter Type (from dropdown)**
- **Enter the Note (text field)**
- **The date and author auto fills**

Example:



Tasks Tab

You can schedule tasks, and assign them to involved persons on a case with a reminder pop up. **Note: Tasks are not shown on a person's My JustWare Calendar, but they are shown under Views, VT Tasks in the My JustWare session.**

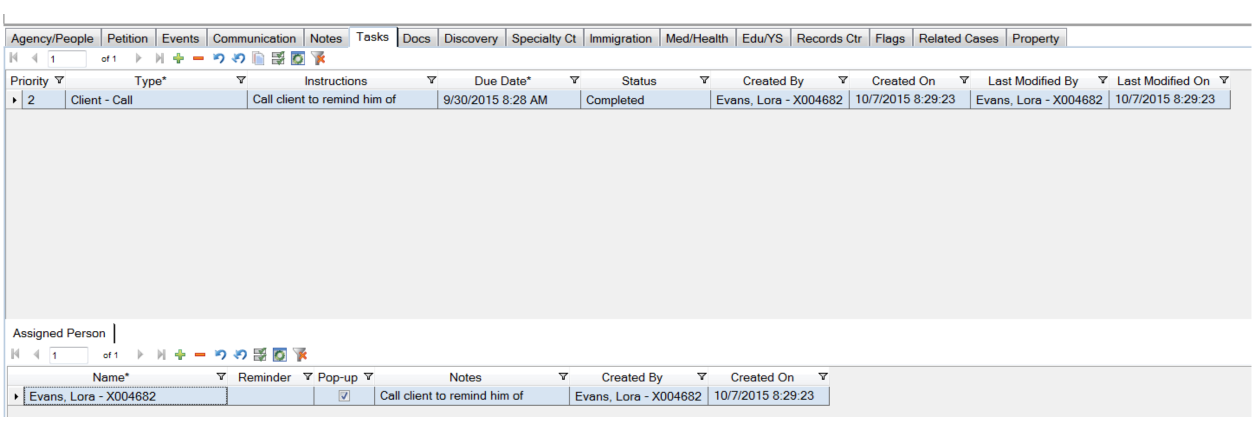
To add a task:

- **Click Green Plus sign to add row**
- **Type the Priority (High to Low or a number)**
- **Enter Type (from dropdown)**
- **Enter Instructions (text field)**
- **Fill in the Due Date**
- **Enter Status (from dropdown)**
- **The date and author auto fills**

Assign the task under Assigned Person:

- **Click Green Plus sign to add row**
- **Choose the person (from dropdown)** (the person needs to be a case involved person)
- **Set up reminders**
- **Enter a note (text field)**
- **The date and author auto fills**

Example:

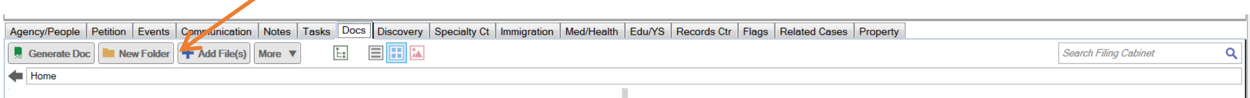


Docs Tab

JustWare can store electronic files related to names and cases in the **Docs** tab, which JustWare refers to as the Filing Cabinet. **Note: We do not have the capacity to store audio or video files in JustWare.** These types of files would increase the size of our database tremendously, and increase the need for storage space and slow down the file transfer rate to and from the server when you are working on individual files. You should only save documents or PDF files in JustWare. This is where you can generate documents from templates (covered separately).

To add a document to a case:

- **On the Docs tab click Add File(s)** (You will see a window, similar to when you open any file on your computer.)



- **Navigate to the folder and file that you would like to add to the case**
- **Highlight the file**
- **Click Open**

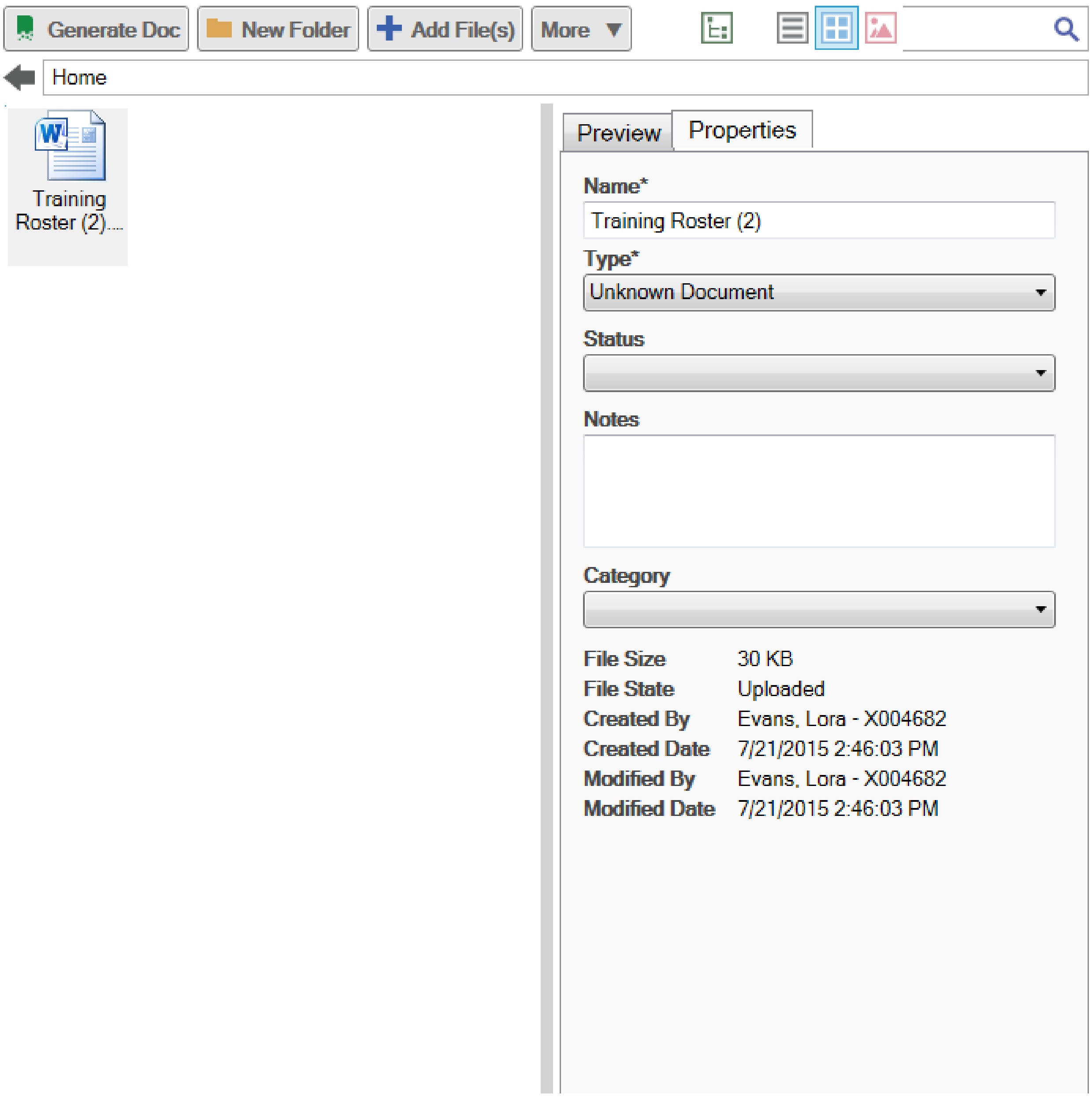
The file is added to the case

Note: As soon as you add documents to the case, a new set of tabs and dropdowns opens on the right:

You can preview the document, and note properties about the document.

Note: the file is not uploaded to the JustWare server, until you save the record.

The **Documents** tab showing one document uploaded to the JustWare server.



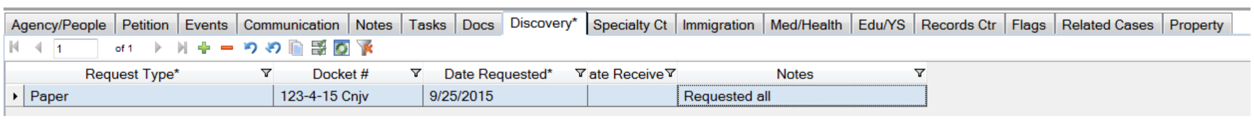
Discovery Tab

You can track request and receipt of discovery materials.

To add a discovery item:

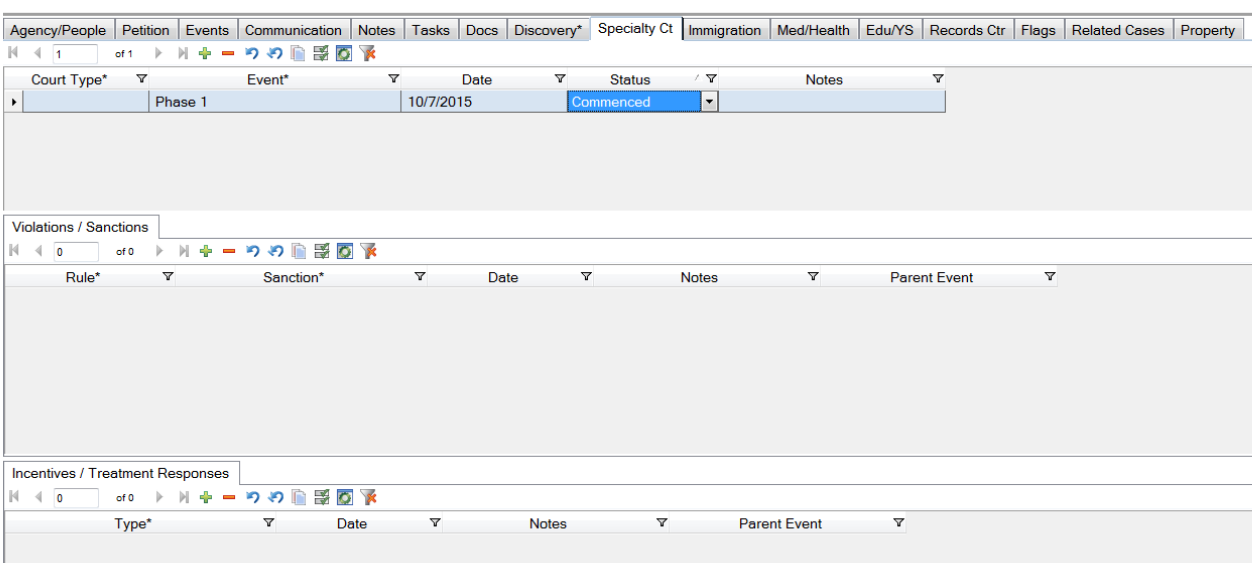
- **Click Green Plus sign to add row**
- **Enter Request Type (from dropdown)**
- **Enter docket number (from dropdown)**
- **Date Requested auto fills**
- **Enter Date Received**
- **Enter Notes (text field)**

Example:



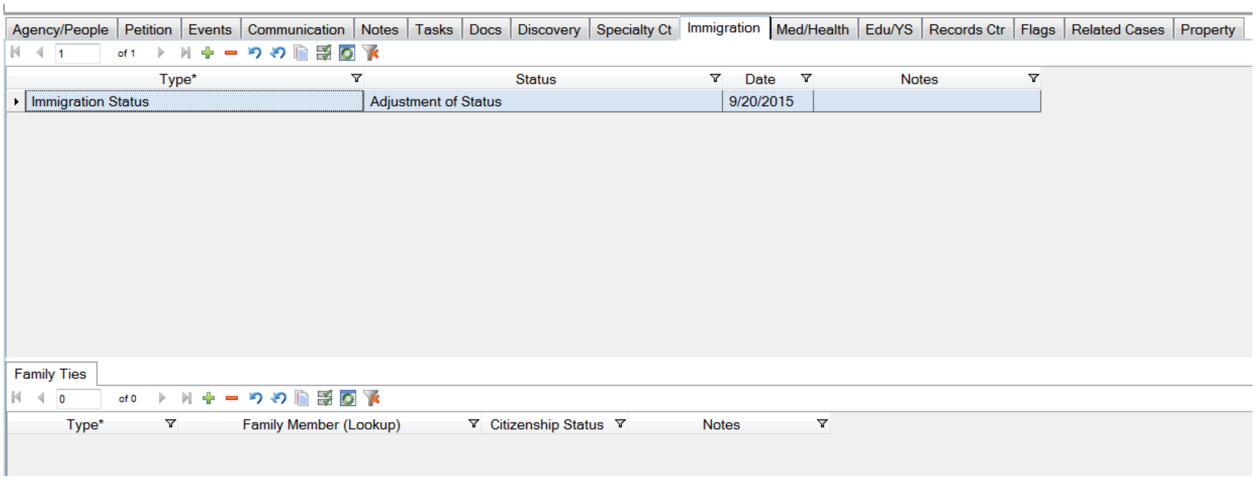
Specialty Court Tab

The Specialty Court Tab is set up to track events in specialty courts. Data in most fields is entered from dropdowns, and text can be entered in the Notes field. Example:



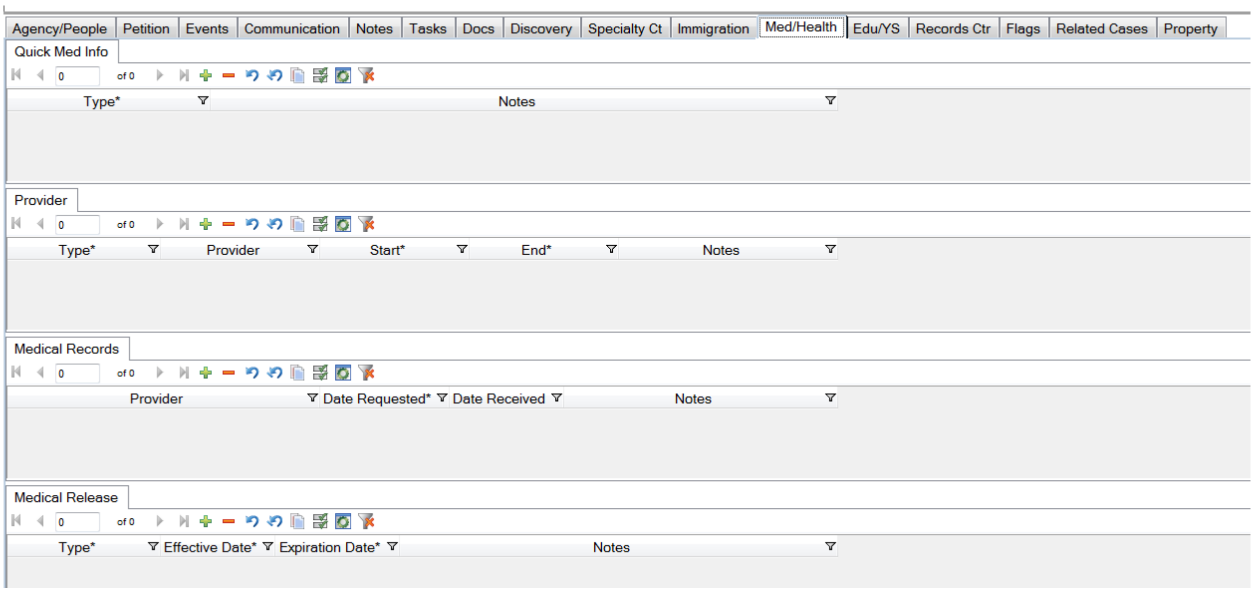
Immigration Tab

The immigration tab enables you to track any information related to the person's immigration status. Data in most fields is entered from dropdowns, and text can be entered in the Notes field. Example:



Med/Health Tab

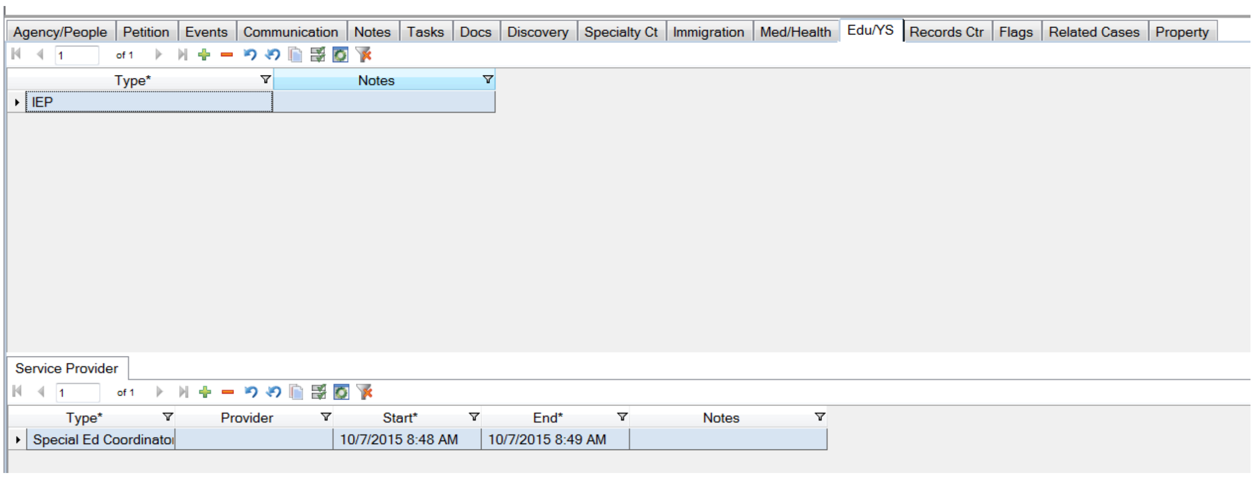
The **Med/Health** tab enables you to track any medical, mental health, and medical release information. There are sub-tabs for **Quick Med Info, Provider** and **Medical Release.** Data in most fields is entered from dropdowns, and text can be entered in the Notes field. If you want to include the name of a medical or mental health provider, you must first involve the provider in the case. Example:



Edu/YS Tab

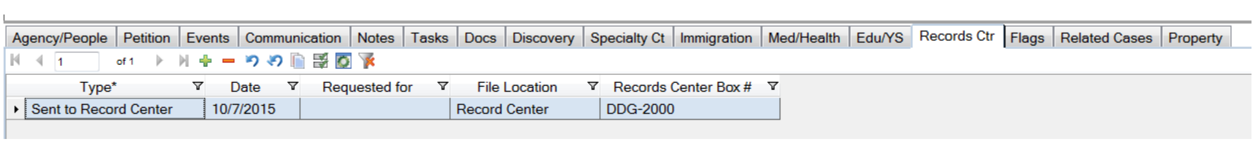
The **Edu/YS** tab enables you to track education/youth services. Items in the dropdown include:

- 504
- IEP
- Extra-curricular activities
- Transition Services
- Youth Development Plan



Records Tab

The **Records** Tab is used to track storage of the case file at the Records Center. Data in most fields is entered from dropdowns, and the Requested for and Records Center Box # can be entered. Example:

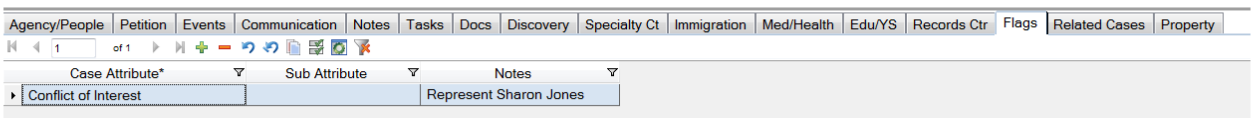


Flags Tab

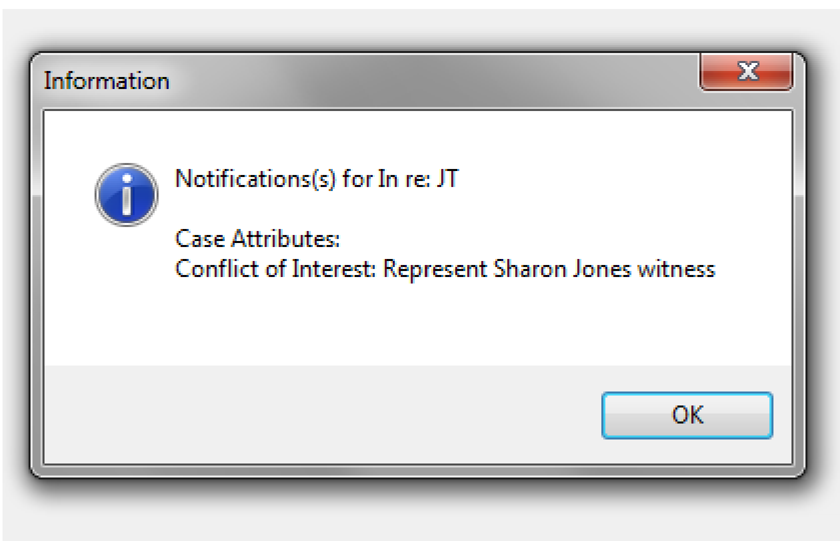
The **Flags** tab is currently used to track the following case attributes:

- CASE EXPUNGED
- CASE SEALED
- Competency Result or Finding
- Conflict of Interest (Note who the conflict is with in the Notes field)
- Gang Member

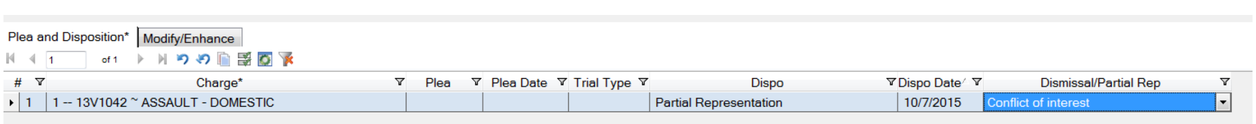
Enter the attribute from the dropdown, and then use additional dropdowns or the Notes field to provide additional information.



Note: Any attributes identified in the **Flags** tab will be displayed in a Notification window when the case is opened:

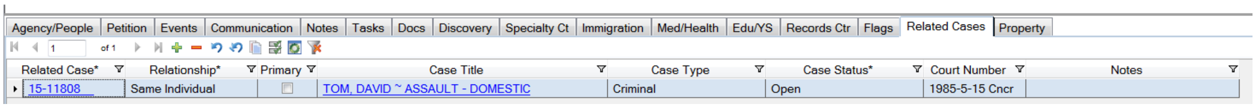


If the **Conflict of Interest** resulted in **Partial Representation**, complete the **PetitionDisposition** tab.



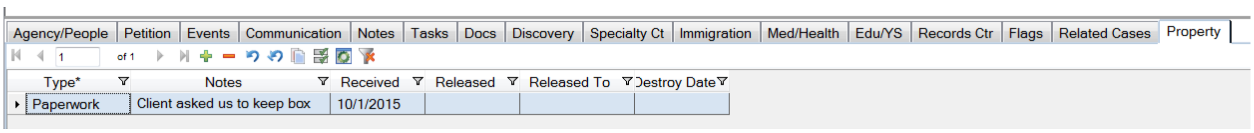
Related Cases Tab

The **Related Cases** tab allows you to track any related cases (Companion Case, Family Division or Same Individual). Example:



Property Tab

The **Property** tab allows you to track any property, such as client clothing. Enter the Type from the dropdown, and fill in additional information in the Notes and other fields. Example:



Reports, Case Summary

You can view a case summary by clicking on

- **Reports**
- **Case Summary**

Note: Do not change the status to Closed until the court case closes.