

OFFICE OF THE DEFENDER GENERAL CASE MANAGEMENT SYSTEM

JustWare Defender How to Create a Criminal Case Record

This guide walks you through creating a Criminal 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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How to Create a JustWare Case Record (PRO-Litigation)

Search for the name of the person for whom you are creating a new case.

- **Quick Search**
- **Fill in name**
- **Press Enter or Click Search Button**

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



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

Once the name record exists:

- **Click Actions, New Case**
- **Choose 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 PRO-Litigation 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.

Criminal case screen:

The screenshot displays a software interface for a criminal case. At the top, there are several dropdown menus: 'Case Type*' set to 'Criminal', 'Status*' set to 'Open', 'Status Date*' set to '10/01/2015', 'Opened Date*' set to '10/01/2015', 'Agency Added By*' set to 'ODG Administration', and 'JW CaseID' set to '15-615'. Below this is a 'Client Info' section with fields for 'Address: None on File' and 'Phone: None on File'. A navigation bar includes links for 'VtCourtsOnline', 'DG Website', 'Offender Locator', and 'Westlaw Signin'. The main interface has tabs for 'Agency/People', 'Charges', 'Events', 'Communication', 'Notes', 'Tasks', 'Docs', 'Discovery', 'Specialty Ct', 'Immigration', 'Med/Health', 'Records Ctr', 'Flags', 'Related Cases', and 'Property'. The 'Agency/People' tab is active, showing a table with columns: 'Agency Type*', 'Agency*', 'Incident #', 'Active', 'Lead', and 'Notes'. Below this is a 'Court' section with a table for 'Docket Agency*', 'Docket #', 'Active', and 'Lead'. The 'People' section at the bottom shows a table with columns: 'Agency', 'Role*', 'Name*', 'Lead', 'Active', 'Active Date', 'Inactive Date', and 'Notes'. One entry is visible: 'Client', 'Prescott, Adam', with 'Active' checked and 'Active Date' as '10/1/2015'.

Note: If you open a case with the person's name record screen being active, the Status defaults to Open, and as soon as you save the case record, the client's name is automatically filled in the People tab.

This screenshot shows the same software interface as above, but with the 'People' tab highlighted in a red circle. An orange arrow points from the 'People' tab to the 'Name*' field in the table below. The table has columns: 'Agency', 'Role*', 'Name*', 'Lead', 'Active', 'Active Date', 'Inactive Date', and 'Notes'. One entry is visible: 'Client', 'Smith, Roger', with 'Active' checked and 'Active Date' as '7/17/2015'.

- Save the record
 - File, Save Case, or Actions, Save Case, or
 - Press Ctrl-S

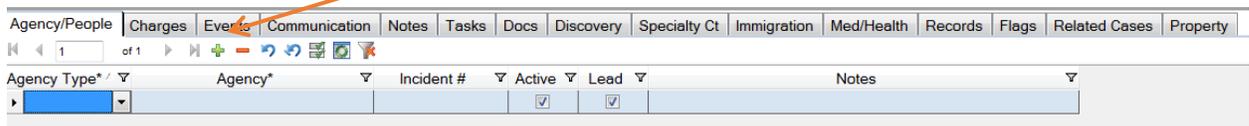
Continue entering case information:

Agency/People

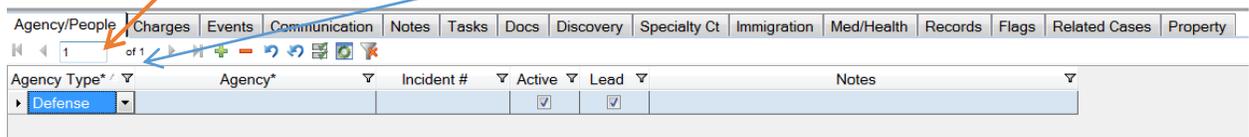
Note: You must involve the agency before involving a person who is a member of an agency, by adding the agency and saving the case.

To Involve an Agency:

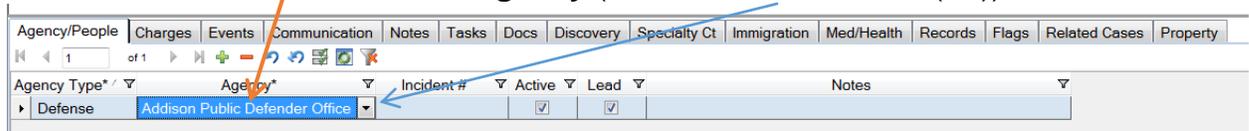
- Click on the **Agency/People Tab**
- Click the **green plus sign (+)** to add a line (the red minus sign deletes a line)



- 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(▼))



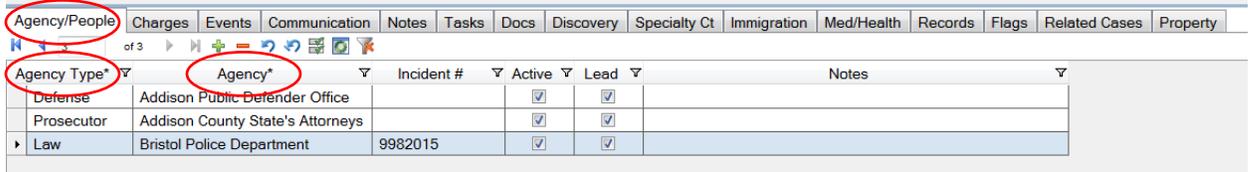
Note: The Agency Types are set to Defense, Law, Other and Prosecution.

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 police department added:



Agency Type*	Agency*	Incident #	Active	Lead	Notes
Defense	Addison Public Defender Office		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Prosecutor	Addison County State's Attorneys		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Law	Bristol Police Department	9982015	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

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
- Co-defendant
- Complainant
- Expert
- Father
- Mother
- Relative
- Victim (Alleged)
- Witness

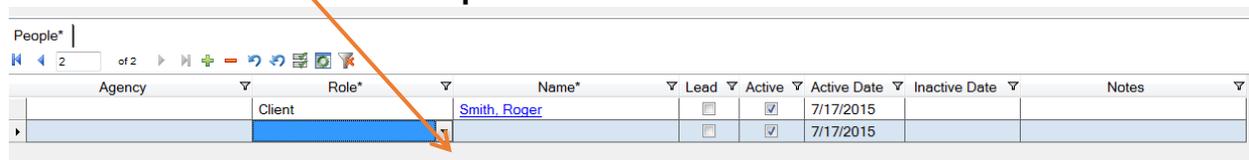
Note: the client (the primary involved person) must be added in this tab before the record can be saved. If you created a new client, and then clicked on **Actions, New Case**, the client is automatically entered in the **People** tab. We recommend that you add the client's name here first, save the 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)



The screenshot shows the 'People' tab interface. At the top, there is a toolbar with a green plus sign (+) and a red minus sign (-). Below the toolbar is a table with the following columns: Agency, Role*, Name*, Lead, Active, Active Date, Inactive Date, and Notes. The table contains one row with the following data: Agency (blank), Role* (Client), Name* (Smith, Roger), Lead (checkbox), Active (checkbox checked), Active Date (7/17/2015), Inactive Date (blank), and Notes (blank). An orange arrow points from the text above to the green plus sign in the toolbar.

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



The screenshot shows the 'People' tab interface with two records. The first record is the same as in the previous screenshot. The second record has Agency (blank), Role* (Client), Name* (Smith, Roger), Lead (checkbox), Active (checkbox checked), Active Date (7/17/2015), Inactive Date (blank), and Notes (blank). The Role* dropdown menu for the second record is open, showing a list of roles. An orange arrow points from the text above to the Role* dropdown menu.

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.

Agency	Role*	Name*	Lead	Active	Active Date	Inactive Date	Notes
	Client	Smith, Roger	<input type="checkbox"/>	<input checked="" type="checkbox"/>	7/17/2015		
			<input type="checkbox"/>	<input checked="" type="checkbox"/>	7/17/2015		

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.

Agency	Role*	Name*	Lead	Active	Active Date	Inactive Date	Notes
	Client	TOM DAVID	<input type="checkbox"/>	<input checked="" type="checkbox"/>	10/7/2015		
	Relative	AS	<input type="checkbox"/>	<input checked="" type="checkbox"/>	10/7/2015		

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

Last Name	First Name	Middle Name	Prefix	Suffix
AS				

Last Name	First Name	Middle Name	Name Type	Race	Sex	Hair	Eyes	Weight	Height	DOB	Age	L Nur	DL State	DL Class	SSN
AS					Male					2/13/1995	20				
AS					Female					5/19/1985	30				
AS					Female					2/28/2004	11				
AS					Male					5/13/1992	23				

People tab with Co-Defendant added:

Agency	Role*	Name*	Lead	Active	Active Date	Inactive Date	Notes
	Client	Smith, Roger	<input type="checkbox"/>	<input checked="" type="checkbox"/>	7/17/2015		
	Co-Defendant	Benware, Ralph A.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	7/17/2015		

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)



Agency	Role*	Name*	Lead	Active	Active Date	Inactive Date	Notes
	Client	Smith, Roger	<input type="checkbox"/>	<input checked="" type="checkbox"/>	7/17/2015		

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



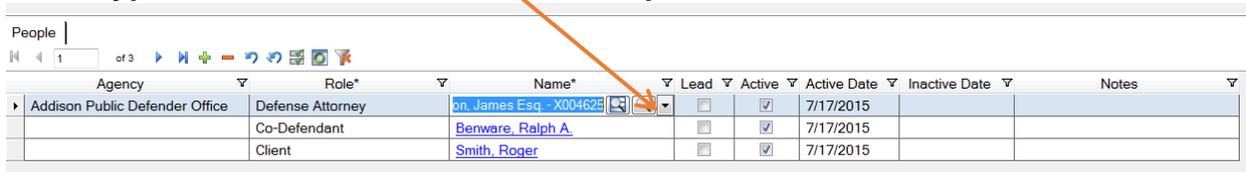
Agency	Role*	Name*	Lead	Active	Active Date	Inactive Date	Notes
Addison Public Defender Office	Defense Attorney	Gratton, James Esq. - X004625	<input type="checkbox"/>	<input checked="" type="checkbox"/>	7/17/2015		
	Co-Defendant	Benware, Ralph A.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	7/17/2015		
	Client	Smith, Roger	<input type="checkbox"/>	<input checked="" type="checkbox"/>	7/17/2015		

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



Agency	Role*	Name*	Lead	Active	Active Date	Inactive Date	Notes
Addison Public Defender Office	Defense Attorney	Gratton, James Esq. - X004625	<input type="checkbox"/>	<input checked="" type="checkbox"/>	7/17/2015		
	Co-Defendant	Benware, Ralph A.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	7/17/2015		
	Client	Smith, Roger	<input type="checkbox"/>	<input checked="" type="checkbox"/>	7/17/2015		

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



Agency	Role*	Name*	Lead	Active	Active Date	Inactive Date	Notes
Addison Public Defender Office	Defense Attorney	on. James Esq. - X004625	<input type="checkbox"/>	<input checked="" type="checkbox"/>	7/17/2015		
	Co-Defendant	Benware, Ralph A.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	7/17/2015		
	Client	Smith, Roger	<input type="checkbox"/>	<input checked="" type="checkbox"/>	7/17/2015		

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 client, defense attorney, state's attorney and co-defendant added:



Agency	Role*	Name*	Lead	Active	Active Date	Inactive Date	Notes
Addison Public Defender Office	Defense Attorney	Gratton, James Esq. - X004625	<input type="checkbox"/>	<input checked="" type="checkbox"/>	7/17/2015		
Addison County State's Attorneys	Prosecuting Attorney	Fenster, David State's Attorney - X	<input type="checkbox"/>	<input checked="" type="checkbox"/>	7/17/2015		
	Co-Defendant	Benware, Ralph A.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	7/17/2015		
	Client	Smith, Roger	<input type="checkbox"/>	<input checked="" type="checkbox"/>	7/17/2015		

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.

The screenshot shows the 'Court' tab interface. The 'Court' tab is highlighted with a red oval. The interface includes a top navigation bar with tabs like 'Agency/People', 'Charges', 'Events', 'Communication', 'Notes', 'Tasks', 'Docs', 'Discovery', 'Specialty Ct', 'Immigration', 'Med/Health', 'Records', 'Flags', 'Related Cases', and 'Property'. Below the navigation bar is a table for 'Agency Type' and 'Agency' with columns for 'Incident #', 'Active', and 'Lead'. A second table below is for 'People' with columns for 'Agency', 'Role*', 'Name*', 'Lead', 'Active', 'Active Date', 'Inactive Date', and 'Notes'.

Agency Type*	Agency*	Incident #	Active	Lead	Notes
Defense	Addison Public Defender Office		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Law	Bristol Police Department		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Prosecutor	Addison County State's Attorneys		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Agency	Role*	Name*	Lead	Active	Active Date	Inactive Date	Notes
Addison Public Defender Office	Defense Attorney	Gratton, James Esq. - X004625	<input type="checkbox"/>	<input checked="" type="checkbox"/>	7/17/2015		
Addison County State's Attorneys	Prosecuting Attorney	Fenster, David State's Attorney - X	<input type="checkbox"/>	<input checked="" type="checkbox"/>	7/17/2015		
	Co-Defendant	Benware, Ralph A.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	7/17/2015		
	Client	Smith, Roger	<input type="checkbox"/>	<input checked="" type="checkbox"/>	7/17/2015		

Docket number should be entered in the format 123-4-15 Ancr. 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:

The screenshot shows the 'Court' tab interface with the docket number '125-4-15 Ancr' entered in the 'Docket #' field. The 'Lead' checkbox is checked.

Docket Agency*	Docket #	Active	Lead
AN Superior Ct - Criminal Division	125-4-15 Ancr	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Save the case:

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

Charges Tab

- **Click Green Plus sign to add row**
- **Enter incident 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 (SA) and tab

Depending on the search you use, you may need to click **Use Statute** from the left menu. (See the section on **Search for Statute** for more detail.) Note: The **Severity** of the crime will be automatically entered. If the charge is a listed crime, the **Listed Crime** column will be automatically completed.

The charge tab with one charge added:

#	Incident Date	Docket #	Statute*	Severity	Listed Crime
1	7/1/2015	255-7-15 Ancr	13V1023(a)(1) ~ ASSAULT - SIMPLE	Misdemeanor	

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 and sentencing, or you will receive an error message.

The charge is automatically entered under the **Plea and Disposition** tab. The **Modify/Enhance** tab is automatically completed if the charge includes a modifier or enhancer.

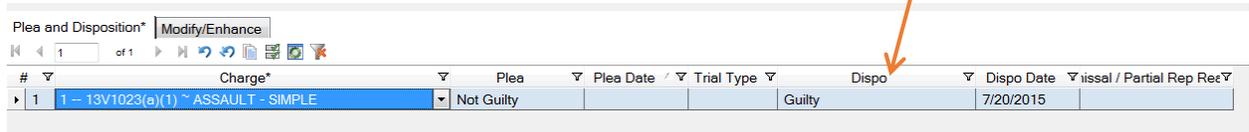
If you have several counts of the same charge to enter, i.e., several VOP's, you do not need to add a new line for each, but you can use the **Copy Record**

feature , on the Tab (Snap-in) Toolbar, select the charge to copy, enter the number of copies, and then click **Actions, Copy**.

Save the case

Disposition and Sentencing

Disposition is entered on the same line as the plea in the Dispo field (from the dropdown). You must enter the date.



#	Charge*	Plea	Plea Date	Trial Type	Dispo	Dispo Date	Dismissal / Partial Rep Rec
1	1 - 13V1023(a)(1) ~ ASSAULT - SIMPLE	Not Guilty			Guilty	7/20/2015	

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



#	Charge*	Plea	Plea Date	Trial Type	Dispo	Dispo Date	Dismissal/Partial Rep
1	1 - 13V1042 ~ ASSAULT - DOMESTIC				Partial Representation	10/7/2015	Conflict of interest

Sentencing

- **Add a line. The charge will auto-populate.**
- **Enter the date, unless it's the current date.**
- **Choose the type of sentence from the dropdown:**
 - Community Service
 - Deferred
 - Fine
 - Incarceration
 - PAF
 - PAF with Home Confinement
 - PAF with Work Crew
 - Reimbursement
 - Rep Board – NO Probation
 - Restitution
 - Supervised Community Sentence
 - Suspended w/Admin Probation
 - Suspended w/Regular Probation
- **If there is more than one type of sentence (such as incarceration and fine), enter each type separately. Use Copy Record from the Tab (Snap-in) Toolbar to copy the line for one or more new lines.**
- **Enter time in the Minimum and Maximum columns.**
- **Enter period of time (Day, Hour, Month, Life, Week, Year) in the Min Period and Max Period.**
- **Click the Credit checkbox if credit for time served is given.**
- **Choose concurrent or consecutive (if appropriate) in the Conc/Cons dropdown.**
- **Enter money amounts (Fine, Restitution) in the \$ Amount \$ column.**

Attempted Charges

If the charge is Attempted, enter the actual crime in **Charges**, and enter Attempted in the **Modify/Enhance** Tab. You will need to search for the appropriate Attempted statute.

Violation of Probation Charges

Enter a VOP by adding the charge to the original case, if the original case IS in JustWare. If the original case IS NOT in Justware, add a new case, only for the VOP.

Search for the original case by docket number.

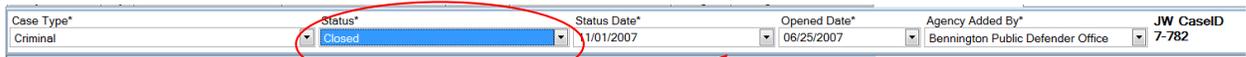
If the docket number is not found, search for the name of the person for whom you are adding a VOP, and look for the original case under the name.

Quick Search

- Fill in docket number or name
- Press Enter or Click Search Button

Open the criminal case record.

Change the Status from Closed to Open



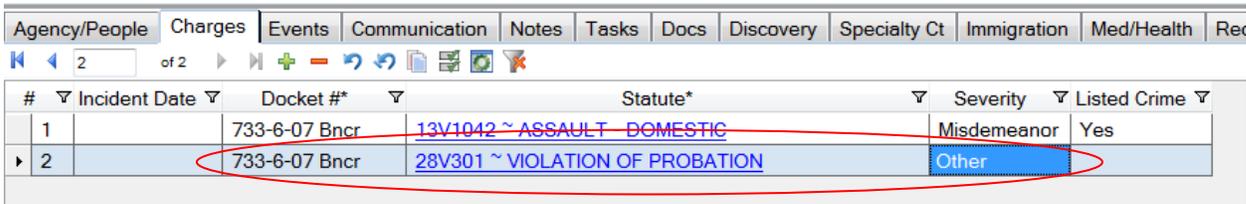
A screenshot of a software interface showing a case record header. The 'Status' dropdown menu is open and set to 'Closed'. A red circle highlights the 'Closed' option, and a red arrow points from the text 'Change Status Date to the Current Date' below to the 'Status Date' field.

Case Type*	Criminal	Status*	Closed	Status Date*	1/01/2007	Opened Date*	06/25/2007	Agency Added By*	Bennington Public Defender Office	JW CaseID	7-782
------------	----------	---------	--------	--------------	-----------	--------------	------------	------------------	-----------------------------------	-----------	-------

Change Status Date to the Current Date

Under the Charges tab:

- Add a new line for the VOP
 - Enter the docket number (from the original charge)
 - Enter VOP under Statute (you may use the short code VOP)



A screenshot of the 'Charges' tab in a software interface. The table below shows two rows of charge information. The second row is highlighted with a red circle, and a red arrow points from the text 'Change Status Date to the Current Date' above to the 'Status Date' field in the screenshot above.

#	Incident Date	Docket #*	Statute*	Severity	Listed Crime
1		733-6-07 Bncr	13V1042 ~ ASSAULT DOMESTIC	Misdemeanor	Yes
2		733-6-07 Bncr	28V301 ~ VIOLATION OF PROBATION	Other	

Lesser Offenses

If the disposition is on a lesser offense:

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

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

The **Charges** tab with **Disposition** and **Sentence** entered:

The screenshot displays three tabs in a legal case management system:

- Charges**: Shows a table with columns for #, Incident Date, Docket #, Statute*, Severity, and Listed Crime. A single row is visible: 1, 4/5/2015, 125-4-15 Ancr, 13V1023(a)(1) ~ ASSAULT - SIMPLE, Misdemeanor.
- Plea and Disposition**: Shows a table with columns for #, Charge*, Plea, Plea Date, Trial Type, Dispo, Dispo Date, and Missal / Partial Rep Rec. A single row is visible: 1, 1 -- 13V1023(a)(1) ~ ASSAULT - SIMPLE, Not Guilty, (blank), Guilty, 7/20/2015.
- Sentence**: Shows a table with columns for #, Charge*, Sentencing Date*, Type*, Minimum, Min Period, Maximum, Max Period, \$ Amount \$, and Credit. Two rows are visible:

#	Charge*	Sentencing Date*	Type*	Minimum	Min Period	Maximum	Max Period	\$ Amount \$	Credit
1	1 -- 13V1023(a)(1) ~ ASSAULT - SIMPLE	7/20/2015	Incarceration	30	Day	60	Day		<input type="checkbox"/>
1	1 -- 13V1023(a)(1) ~ ASSAULT - SIMPLE	7/20/2015	Fine					\$500.00	<input type="checkbox"/>

You can view a case summary by clicking on

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

When the case is closed, change **Status** to **Closed**.

Save the case:

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

Events Tab

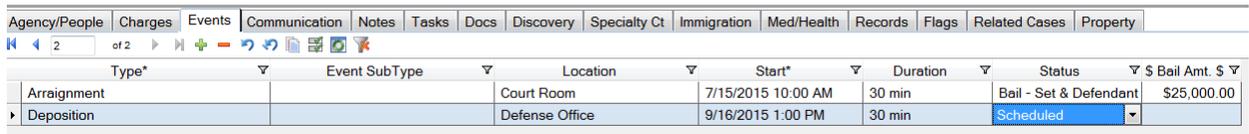
Court hearings, depositions, discovery deadlines, and any other events can be entered. You may enter people in **Event Involved People**, at the bottom of the **Events** screen, and you may set up a reminder. If a person is added as an **Event Involved Person**, the event will be added to the person's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

Note: You must add the Arraignment 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 arraignment and deposition added:



Type*	Event SubType	Location	Start*	Duration	Status	\$ Bail Amt. \$
Arraignment		Court Room	7/15/2015 10:00 AM	30 min	Bail - Set & Defendant	\$25,000.00
Deposition		Defense Office	9/16/2015 1:00 PM	30 min	Scheduled	

Note: If you have served a subpoena, you should use **Subpoena Service** as an **Event** and show **Status** as **Served**. You can also include the **Event Involved People** to show the people who were served. After each involved person there are also **Date** and **Served** fields so you can enter the service date and check "Served".

Communications Tab

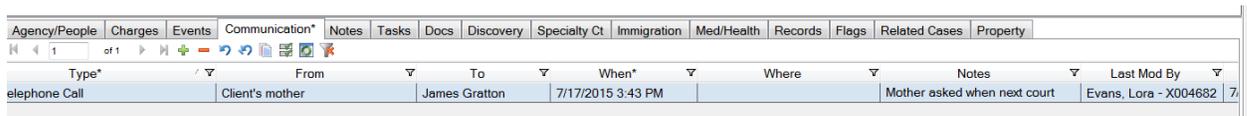
You can track various communications (email, in person, letter, telephone call, text message).

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:



The screenshot shows a software interface with a top navigation bar containing tabs: Agency/People, Charges, Events, Communication*, Notes, Tasks, Docs, Discovery, Specialty Ct, Immigration, Med/Health, Records, Flags, Related Cases, and Property. Below the navigation bar is a table with the following data:

Type*	From	To	When*	Where	Notes	Last Mod By
telephone Call	Client's mother	James Gratton	7/17/2015 3:43 PM		Mother asked when next court	Evans, Lora - X004682

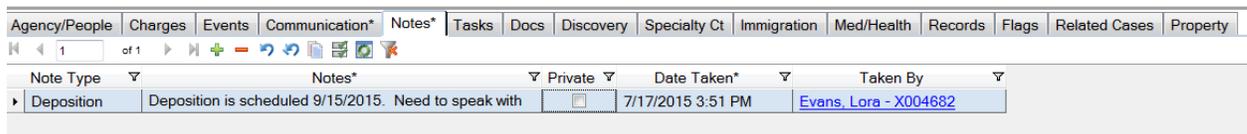
Notes Tab

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:



The screenshot shows a software interface with a top navigation bar containing tabs: Agency/People, Charges, Events, Communication*, Notes*, Tasks, Docs, Discovery, Specialty Ct, Immigration, Med/Health, Records, Flags, Related Cases, and Property. Below the navigation bar is a table with the following data:

Note Type	Notes*	Private	Date Taken*	Taken By
Deposition	Deposition is scheduled 9/15/2015. Need to speak with	<input type="checkbox"/>	7/17/2015 3:51 PM	Evans, Lora - X004682

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

You can enter **Serve Subpoena** as a **Task** and involve yourself with a reminder. When you actually serve the subpoena, enter it as an **Event** (See Event Tab).

The screenshot displays the 'Tasks' tab in the JustWare interface. The top navigation bar includes tabs for Agency/People, Charges, Events, Communication, Notes, Tasks, Docs, Discovery, Specialty Ct, Immigration, Med/Health, Records, Flags, Related Cases, and Property. Below the navigation bar is a toolbar with various icons. The main content area shows a table with the following data:

Priority	Type*	Instructions	Due Date*	Status	Created By	Created On
High	Client - Interview	Client needs initial interview	7/20/2015 4:01 PM	Assigned	Evans, Lora - X004682	7/17/2015 4:05:13

Below the task table is a section titled 'Assigned Person' with a toolbar and a table showing the assigned person's details:

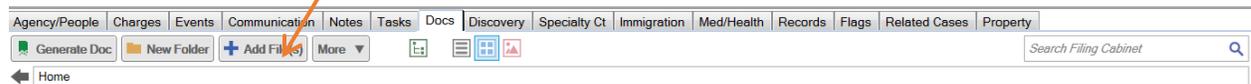
Name*	Reminder	Email	Pop-up	Notes	Created By	Created On
Evans, Lora - X004682	<input type="checkbox"/>	<input type="checkbox"/>	Find interview form before		Evans, Lora - X004682	7/17/2015 4:05:13

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.

The screenshot displays a web interface for document management. At the top, there is a toolbar with buttons for 'Generate Doc', 'New Folder', 'Add File(s)', and 'More'. Below the toolbar is a breadcrumb navigation bar showing 'Home'. The main content area features a document icon labeled 'Training Roster (2)...'. To the right, a 'Properties' panel is open, showing the following details:

Name*	Training Roster (2)
Type*	Unknown Document
Status	
Notes	
Category	
File Size	30 KB
File State	Uploaded
Created By	Evans, Lora - X004682
Created Date	7/21/2015 2:46:03 PM
Modified By	Evans, Lora - X004682
Modified Date	7/21/2015 2:46:03 PM

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:

Request Type*	Docket #	Date Requested*	Date Received	Notes
Paper	125-4-15 Ancr	7/17/2015		Requested discovery, including 

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:

Court Type*	Event*	Date*	Status	Notes
Drug Court	Phase 1	7/17/2015	Commenced	

Rule*	Sanction*	Date*	Notes	Parent Event
Missed Appointment	Curfew Modification	7/17/2015		

Type*	Date*	Notes	Parent Event
Additional Community Support Meeting	7/17/2015		

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:

Type*	Status	Date	Notes
Immigration Status	Student Visa	7/20/2015	

Type*	family Member (Lookup)	Citizenship Status	Notes
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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:

Agency/People	Charges	Events	Communication	Notes	Tasks	Docs	Discovery	Specialty Ct	Immigration	Med/Health	Records Ctr	Flags	Related Cases	Property										
Quick Med Info																								
<div style="display: flex; justify-content: space-between;"> 0 of 0 + ↶ ↷ 📄 🔍 ✖ </div> <table border="1" style="width: 100%;"> <thead> <tr> <th>Type*</th> <th>Notes</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> </tr> </tbody> </table>															Type*	Notes								
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Type*	Provider	Start*	End*	Notes																				
Medical Records																								
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Type*	Effective Date*	Expiration Date*	Notes																					

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:

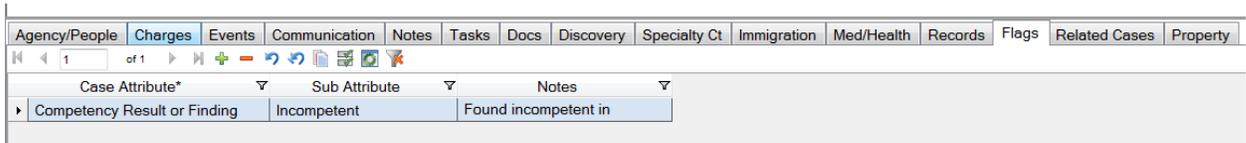
Agency/People	Charges	Events	Communication	Notes	Tasks	Docs	Discovery	Specialty Ct	Immigration	Med/Health	Records*	Flags	Related Cases	Property										
<div style="display: flex; justify-content: space-between;"> 1 of 1 + ↶ ↷ 📄 🔍 ✖ </div> <table border="1" style="width: 100%;"> <thead> <tr> <th>Type*</th> <th>Date*</th> <th>Requested for</th> <th>File Location</th> <th>Public Records Box #</th> </tr> </thead> <tbody> <tr> <td>Sent to Record Center</td> <td>7/20/2015</td> <td></td> <td>Record Center</td> <td>A-DG-201</td> </tr> </tbody> </table>															Type*	Date*	Requested for	File Location	Public Records Box #	Sent to Record Center	7/20/2015		Record Center	A-DG-201
Type*	Date*	Requested for	File Location	Public Records Box #																				
Sent to Record Center	7/20/2015		Record Center	A-DG-201																				

Flags Tab

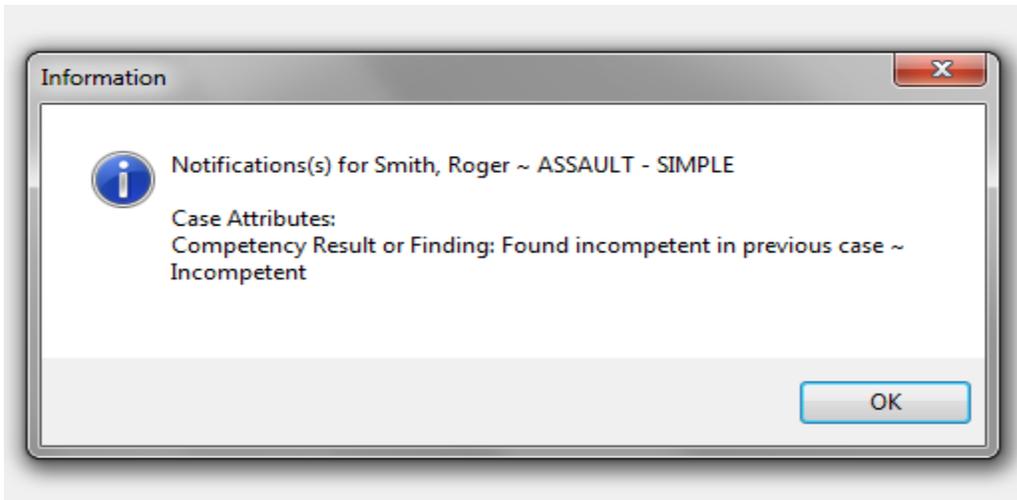
The **Flags** tab is currently used to track the following case attributes:

- CASE EXPUNGED
- CASE SEALED
- Competency Result or Finding
- Conflict of Interest (Note who the conflict is with in the **Notes** tab),
- Gang Member
- Serious Felony Case (seen only by some offices)

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 **Charges, Disposition** tab.



Related Cases Tab

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

Related Case*	Relationship*	Primary	Case Title	Case Type	Case Status*	Court Number	Notes
15-163	Companion Case	<input type="checkbox"/>	Benware, Ralph A. ~ Criminal	Criminal	Open		

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:

Type*	Notes	Received	Released	Released To	Destroy Date
Clothing	Client's dufflebag of clothes	7/20/2015			/ /