Virginia Specialty Docket Database

User's Manual

Specialty Dockets Services
Department of Judicial Services
Supreme Court of Virginia
Revised: 10/27/2021

Contents

Overview

The newly redesigned Specialty Docket Database was implemented on November 2, 2019. The Database aims to aid in the provision of services for specialty docket participants by increasing program accountability, service coordination, and data management. The Virginia Standards mandate that each approved specialty docket program enter referral and case management information in the Specialty Docket Database, as prescribed by the Office of the Executive Secretary.

The Database includes four modules. The Referral Module allows specialty docket teams to create new referrals for potential participants, enter socio-demographic information, and add referral assessments. Once a referral has been accepted as a new participant, the individual's record transitions to the Cases Module. Users enter and update participant progress, program compliance, and the administration of treatment services in the Cases Module. The Mass Update Module increases user efficiency by allowing users to record compliance reviews and drug screens for a multitude of participants at once. Finally, the Database contains the Reports Module, which allows Specialty Docket Coordinators to generate raw data, charts, and summary statistics about referrals and accepted participants.
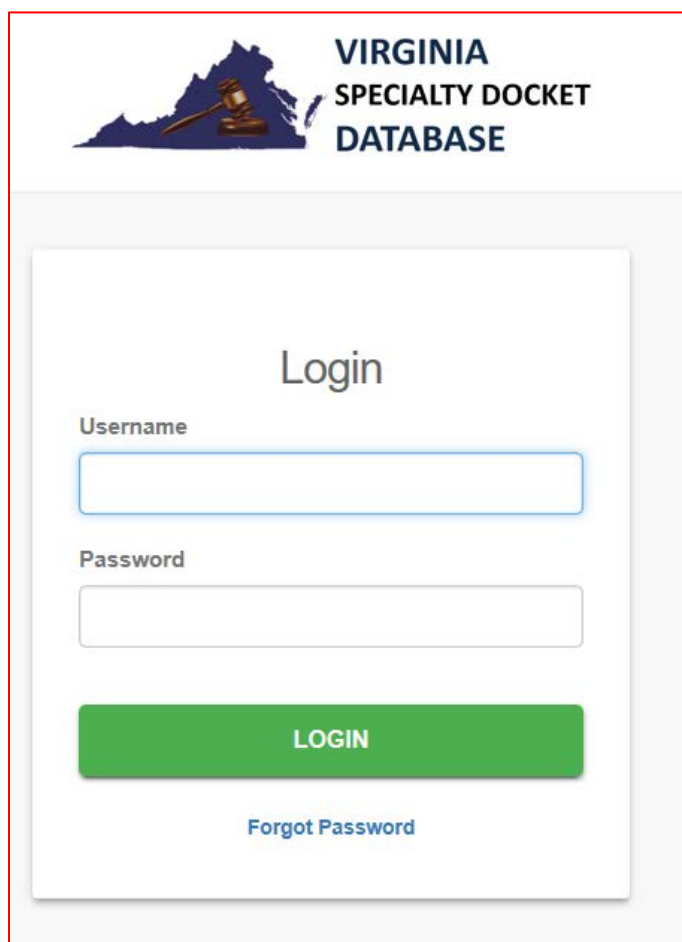
This manual contains a review of the following:

1. Login Process
2. Homepage
3. Referrals Module
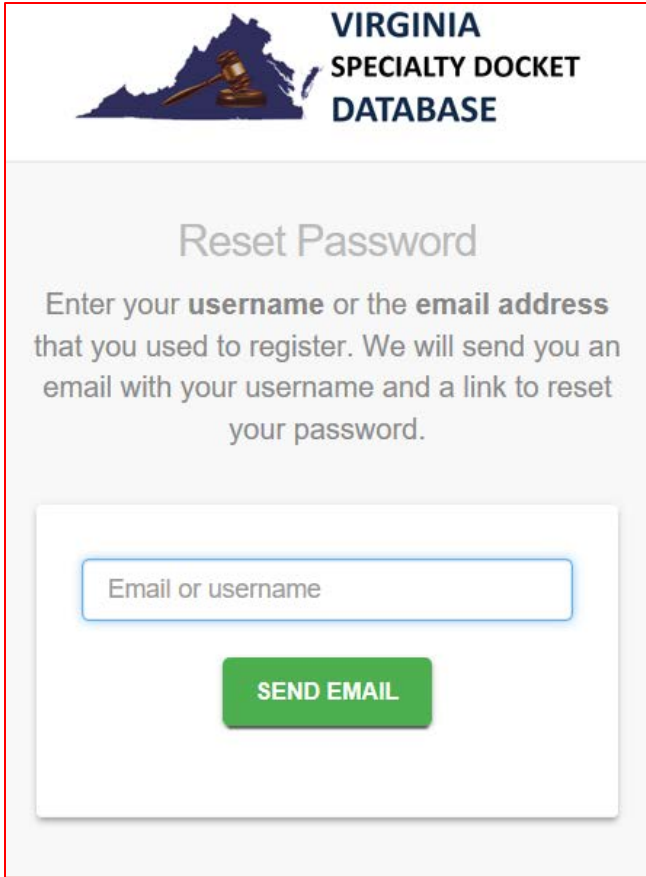4. Cases Module
5. Mass Update Module

Login Process

The Database is hosted on the Supreme Court's secure server. Non-court personnel can only access the Database when connected to the VPN. *If you have any questions regarding the VPN, contact specialtydockets@vacourts.gov.*

Court personnel may access the Database directly from the following web address: https://web-rxcourt-01.vacourts.gov/.

Enter the username and password associated with your Database account. If you forget your password, click the Forgot Password hyperlink located directly under the green Login button. The screenshot below will populate as a new webpage. Users must enter the username and password associated with their Database account, and instructions for resetting the password will be emailed to them. *Note: All autogenerated emails from the Database are sent by CommonThread.*

Password Requirements

Passwords must contain at least three of the four character types listed below.

1. Capital letter
2. Lowercase letter
3. Special character (!@#$)
4. Numerical character

Homepage

After entering the username and password associated with your Database account, you will be routed to the Database's homepage. The homepage contains hyperlinks to the four modules, as well as four interactive dashboards.
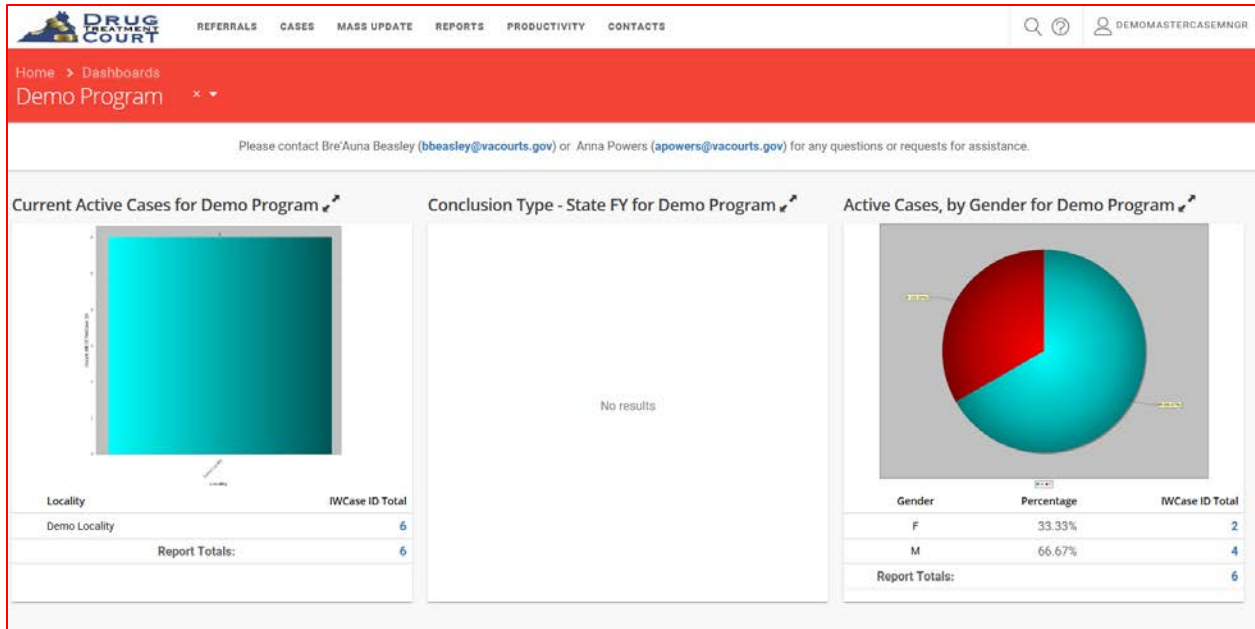
Header

The header contains the Database's primary redirect icon. Clicking the Virginia Specialty Docket icon (located at the top left of the webpage) will route you to the Homepage.

Referrals: Clicking the Referrals hyperlink will route you to the Referrals Module. All referral related information can be accessed in this module.

Cases: Clicking the Cases hyperlink will route you to the Cases Module. All case management related information can be accessed in this module.

Mass Update: Clicking the Mass Update Module will generate a dropdown list of options for mass updates of Compliance Reviews and Drug Test Results.

Reports: Clicking the Reports Module will route you to a list of pre-defined reports.

Search: The Search icon is the first icon on the right side of the homepage. When clicked, a rectangular bar appears. To search for a referral or participant's Person Profile, enter the first four to six characters of the individual's first and/or last name. *Note: The Search icon can be used to locate cases. Enter the first 4-6 characters of the individual's first and/or last name. Select the record with a case number attached (i.e. Minnie Mouse 00-CC-01234-123).*

Profile: The Profile icon is the last icon on the right side of the homepage. When clicked, a list of tasks will appear. To change your password, click Change Password.

Dashboards

The homepage contains several dashboards that report program data. If you have access to multiple specialty docket programs, located the colored bar. Click the downward facing arrow and enter the first four to six characters of the program for which you would like to view dashboards. Once the program populates, click it.

All dashboards are interactive. To view detailed information about any graphic, click the blue hyperlinks. To expand the size of a dashboard, click the dashboards title or the arrows to the very right of the title.
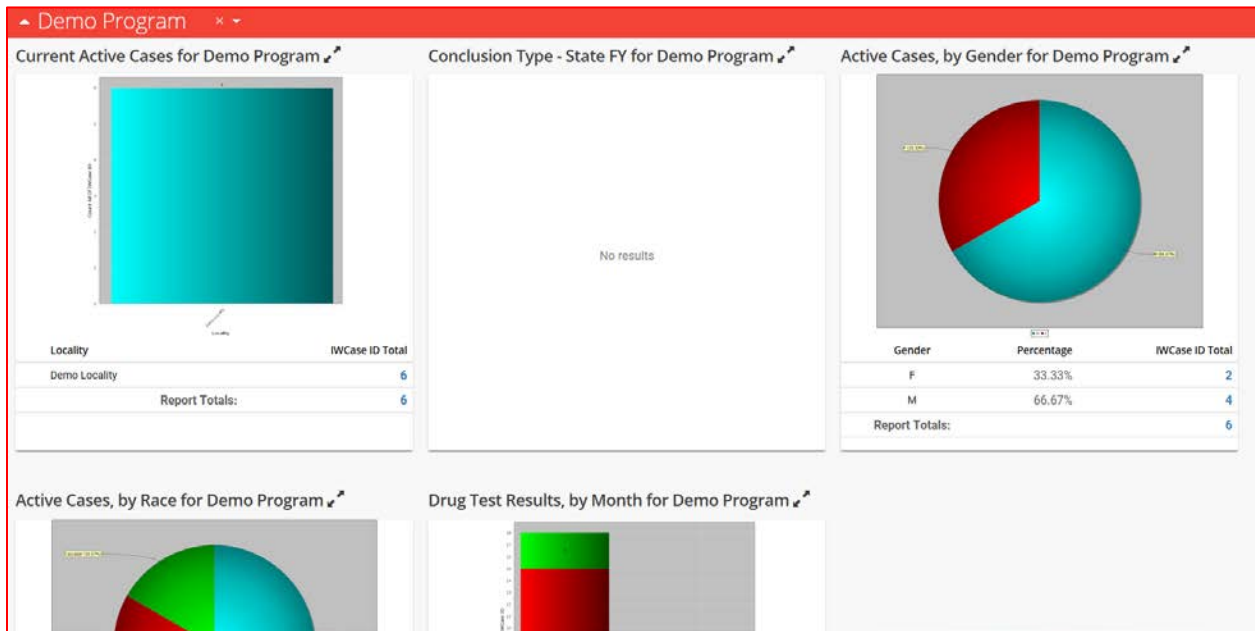
Note: Dashboards update overnight.

Referrals Module

All referral related information can be entered in the Referrals Module. To access the Referral Module, click Referrals located at the top left of the homepage.

The default list of referrals will load.

The populated referrals are <u>Active Referrals</u>. This means the referrals have not been accepted or rejected. To view any inactive referrals, users may access the Filter task at Actions.

Referrals are listed in alphabetical order by last name. If the list of referrals is not listed in alphabetical order, click the Participant column heading.

This webpage contains the following hyperlinks and page redirects.

Referral Number: This hyperlinked field contains the individual's Referral Number. Clicking the Referral Number will route to the Referral Details Page. *Note: To update RANT, Antisocial Personality Disorder (APD), Referral Offense, Person and Referral Info, and Key Dates and Key People data, click the hyperlinked Referral Number.*

Case Number: This hyperlinked field contains the individual's Case Number. Clicking the Case Number will route to the Case Details Page. *Note: To update Phase, Status, Sanctions, Incentives, Drug Test Results, Compliance Reviews, Medication Assisted Treatment, and other case management data, click the hyperlinked Case Number.*

Assessment: This hyperlinked field contains the referred individual's Assessment Number. Clicking the hyperlinked Assessment Number will route you to the Assessment Details page. *Note: To update any Referral Assessment, Add Drug History, Add Health Coverage, Add Diagnosis, Add Military, or Add Health Coverage information, click the hyperlinked Assessment Number.*

Locality: This hyperlinked field identifies the locality from where the referred individual resides.

Referring Locality: This hyperlinked field identifies the locality from where the referral originated.

Model: This static field identifies the specialty docket model in which the individual was referred. Options include: Adult Court, Juvenile Court, Family Court, DUI Court, Veterans Docket, and Behavioral Health Docket.

Program: This hyperlinked field contains the name of the specialty docket program in which the participant is enrolled. Clicking the hyperlinked program name will generate a list of localities serviced by the program.

Participant: This hyperlinked field contains the referred individual's first and last name. Clicking the hyperlinked name will route users to the individual's Person Profile. The Person Profile is where contact and demographic information are entered, updated, and stored.

Referred Date: This static field identifies the date the individual was referred to the specialty docket program.

Phase: This static field identifies whether a Referral Assessment has been completed for the referred individual. Options include: Not Assessed and Assessed. This field should remain Not Assessed if there is no Assessment Number associated with the referred individual.

Eligible for Drug Court: This static field details whether the referred individual is eligible to participate in the specialty docket program. This field is updated based on data entered at the Reject Referral or Accept Case tasks. *Note: This field should remain empty if the referral is active.*

Willing to Participate: This static field details whether the referred individual is willing to participate in the specialty docket. This field is updated based on data entered at the Reject Referral or Accept Case tasks. *Note: This field should remain empty if the referral is active.*

Days from Referral to Assessment: This static field identifies the number of days that have elapsed between the referral date to the assessment date. *Note: If the number in this field is negative, the Referral Date on file is a date after the Assessment. Update the Referral Date and Assessment Date fields.*

RANT Completed: This static field identifies whether a Risk and Needs Triage Assessment has been completed on the referred individual. *Note: All referrals to drug treatment court docket programs must have a completed RANT on file before being accepted.*

Filter Referrals

The Filter Referrals webpage allows Database users to generate a customized list of referrals based on various criteria. To access the Filter Referral webpage, while on the screen that contains the default list of Active Referrals, click Actions, then Filter.

The Filter Referrals page will load. Identify the filters needed. Show Advanced is typically collapsed. To expand the list of filters, click Show Advanced. To generate the customized list of referrals, click Filter. *Note: To generate a list of inactive referrals, locate the Is Active field (seventh field on the left side), select N from the dropdown menu. An inactive referral is one that has been accepted or rejected.*

Create a New Referral

To create a new referral, when on the webpage with the default list of referrals, click Actions, then Create New Referrals. A webpage similar the screenshot below will load.

The Create New Referral form contains four fields.

Locality: This field refers to the locality in which the referred individual resides. To select the most appropriate response, click the downward arrow or enter the first four to six characters of the locality's name. *Note: The list of localities available for selection is contingent upon user account permissions.*

Referring Locality: This field refers to the locality from where the referral originated. To select the most appropriate response, click the downward arrow or enter the first four to six characters of the locality's name. *Note: The list of localities available for selection is contingent upon user account permissions.*

Model: This field identifies the specialty docket model to which the individual was referred. Options include: Adult Court, Juvenile Court, Family Court, DUI Court, Veterans Docket, and Behavioral Health Docket.

Participant: This field contains the referred individual first and last name. To add a new participant, click the blue plus sign above Submit.

Add New Participant Form

Once the blue plus sign above Submit is clicked, the Add New form will load as shown below. Users will need to complete all fields prior to clicking Save. Once the Add New form has been completed, the referred individual's first and last name will appear under the Participant field.

Add New   ✕

Profile

Field	Value
Prefix	
First Name*	Christian
Middle Name*	Mickey
Last Name*	Rogers
Suffix	
Nick Name	Mickey
Type	Participant ✕
SSN	123-45-6789

Demographics

Field	Value
Gender	M ⌄
Race	Other ⌄
Ethnicity	Non-Hispanic/No... ✕ ▾
DOB	01/01/1980

Company Information

Field	Value
Locality	OES

Contact Information

Field	Value
Phone Number	0000000000
Email	stianmickey@dtc.com

First Name: This field denotes the Referral's first name. *Note: Be sure to double the check spelling.*

Middle Name: This field denotes the Referral's middle name. *Note: Be sure to double the check spelling.*

Last Name: This field denotes the Referral's last name. *Note: Be sure to double the check spelling.*

Nick Name: This field denotes any aliases.

Type: This field denotes the type of person profile. This field should always read: Participant.

Gender: This field contains the self-reported gender of the referred individual.

Race: This field contains the self-reported race of the referred individual.

Ethnicity: This field contains the self-reported ethnicity of the referred individual.

DOB: This field denotes the date of birth (dd/mm/yyyy) of the referred individual.

Contact Information: These fields denote the most recent physical address of the referred individual.

Company Information, Locality: The Locality field at Company Information must be updated to reflect the individual's actual locality of residence. If the Locality field is not updated: (1) the participant will not be included in any reports; and (2) you will be unable to access his/her Person Profile.

Once all fields have been updated, click Save. You will then be redirect to the Create New Referral page. The referral's first and last name can be found under Participant. See below.

Click Submit to save the Person Profile information.

Referral Details Page

Once a user submits the Person Profile, the Referral Details page will load. See below. The Referral Details page contains pages to enter and update socio-demographic information, criminal history, and referral assessments such as the RANT and APD. Data can be entered using the tasks at Action or the grids located at the bottom of the webpage.
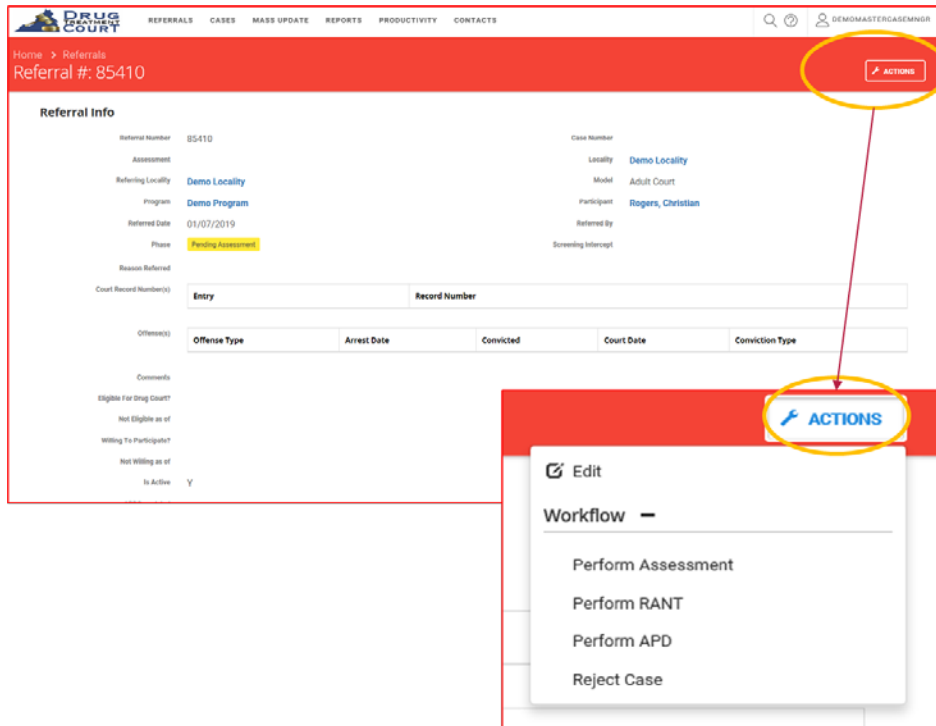
Note: The information entered in the Create New Referral stage has been added to the Referral Info section of the Referral Details Page.

Actions -> Edit

The Edit task may be used to update information regarding reason for referral, screening intercept, and socio-economic statuses at the time of referral. All Referrals should have completed Referral Info, Person Info, Key Dates, and Key People fields.

Referral Info

Complete all fields. Dates may be entered manually or by using the pop-up calendar.

Screening Intercept: The Sequential Intercept Model (SIM) details how individuals with mental health and substance use disorders encounter and move through the criminal justice system.[1] To select the most appropriate intercept, click the downward facing arrow. Options include: Intercept 0: Community Services; Intercept 1: Law Enforcement; Intercept 2: Initial Court Hearings/Initial Detention; Intercept 3: Jails/Courts; Intercept 4: Reentry; Intercept 5: Community Corrections.

Court Record Number: This field contains relevant court record numbers. To add a court record number, see below.

1. Locate the Court Record Number field.
2. Click inside the rectangular box to the right of the Court Record Number field label.
3. A list of court record number labels will populate. Select the most appropriate label. Start with 01st Court Record Number.

---

[1] https://www.samhsa.gov/criminal-juvenile-justice/sim-overview

4. The label will then appear in a gray box. Click inside the box. Enter the Court Record number.
5. Click Save.
6. Repeat as necessary.

Users may enter additional information in the Comments box, as necessary.

Person Info

Once the Referral Info fields have been updated, scroll down. Update the Person Info fields. See below.

All responses are self-reported by the referred individual and should reference their statuses at the time of referral.

Employment Status: This field denotes the employment status of the individual at the time of referral.

Education Level: This field denotes the education level of the individual at the time of referral.

Marital Status: This field denotes the marital status of the individual at the time of referral.

Housing Status: This field denotes the housing status of the individual at the time of referral.

Current School Status: This field denotes whether the individual is receiving educational services at the time of referral.

License Status: This field denotes the license status of the individual at the time of referral.

All responses can be selected by clicking the downward facing arrow to the right of the corresponding field.

Key Dates and Key People

The field options available at Key Dates and Key People vary based on program model. All dates can be entered manually or by using the pop-up calendar.

Actions -> Perform Assessment

All referrals must have a completed Referral Assessment on file. To access the Referral Assessment, while on the Referral Details Page, click Actions. Then, click Perform Assessment. The confirmation message below will appear as a pop-up.
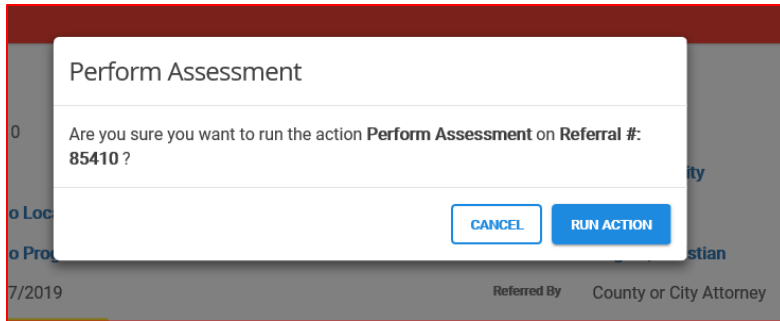
Click Run Action.

The Assessment Entry Form will load. See below.

Client: This static field details the first and last name of the referred individual.

Program Name: This static field details the name of the specialty docket program to which the individual was referred.

Drug Court/Specialty Docket Model: The Model entered in the Create New Referral stage should automatically populate.

Date Assessed: The date contained in this field automatically populates to the date the Run Action was completed. The date can be manually changed or by using the pop-up calendar.

The Assessment Entry Form captures self-reported criminal history, health status, drug history, mental health, and military information for the referred individual. The section labeled, Criminal History, only accepts numerical characters. The sections labeled, "Health Status", "Drug History", "Mental Health", and "Military" only accepted Y and N responses. See below for examples.

Criminal History

Total Felony Arrests from VCIN/Criminal History:

	2

Total Felony Convictions from VCIN/Criminal History:

	2

Total Misdemeanor Arrests from VCIN/Criminal History:

	2

Total Misdemeanor Convictions from VCIN/Criminal History:

	2

Please select 'Y' for all that apply to the participant history for the questions that follow.

Health Status Questions

Allergies

Y	⌄

Diabetes

Y	⌄

Vision Problems

Y	⌄

Head Injury

Y	⌄

Hearing Problems

Y	⌄

Hepatitis C

Y	⌄

Drug History Questions

Blackouts

Y	⌄

Delirium Tremors

Y	⌄

Intravenous Drug Use

Y	⌄

Overdosed

Y	⌄

Prior In-patient substance abuse treatment

Y	⌄

Prior Out-patient substance abuse treatment

Y	⌄

After entering responses for each section, scroll down to the bottom of the webpage. Click Save.

After the form is saved, the Assessment Details Page will load.

Assessment Details Page

The Assessment Details page allows users to edit the Assessment Entry Form and add health coverage, drug history, diagnosis, military, and termination of parental rights records to the referral. All data is added to the Assessment Details page using the tasks found at Actions. See below. *Note: These records do not need to be updated at once. You can always access the Assessment Details Page by clicking the hyperlinked Assessment Number.*

If you need to return to the Referrals Details Page, click the hyperlinked Referral Number.

Assessment Details Page -> Add Health Coverage

To add a health coverage record, click Add Health Coverage from the list of options at Actions. See below.

Complete all fields. All dates can be entered manually or by using the pop-up calendar. If the referred individual is unaware of the exact start and end dates of health coverage, an approximation will suffice. If the referred individual currently has health coverage, the End Date field should be left blank.

Assessment Details Page -> Add Drug History

All individuals referred to a drug treatment court program must have at least one Drug History record. To add a drug history record, select Add Drug History from the list of options at Actions. See below for the Add Drug History webpage.

Complete all applicable fields. Additional comments may be added to each record using the Comment box. *Note: If the referral has more than one drug history record, the Preferred Order field must be completed on each.*

Once each field has been updated and reviewed, the record may be saved. To add additional Drug History records, after clicking Save, click the hyperlinked Assessment Number. Repeat the steps above.

Assessment Details Page -> Add Diagnosis

To add a diagnosis record, select Add Diagnosis from the list of options at Actions. See below for the Add Diagnosis webpage.

 Complete all applicable fields. The DSM Code populates automatically based on the DSM Name. Identify Primary and Secondary diagnoses at Rant. Dates can be entered manually or by using the pop-up calendar.

Once each field has been updated and reviewed, the record may be saved. To add additional records, after clicking Save, click the hyperlinked Assessment Number, and repeat the steps above.

Assessment Details Page -> Add Military History

Military history records must be added to all individuals referred to a veterans treatment docket. Other program models are strongly encouraged to add these records, as applicable. To add a military history record, select Add Military History from the list of options at Actions. See below for the Add Military History webpage.

Complete all fields. Once each field has been updated and reviewed, the record may be saved. To add additional records, after clicking Save, click the hyperlinked Assessment Number, and repeat the steps above.

Assessment Details Page -> Add Military Deployment

Military deployment records must be added to all individuals referred to a veterans treatment docket. Other program models are strongly encouraged to add these records, as applicable. To add a military history record, select Add Military Deployment from the list of options at Actions. See below for the Add Military Deployment webpage.

Complete each field. Once the field has been updated and reviewed, the record may be saved. To add additional records, after clicking Save, click the hyperlinked Assessment Number. Repeat the steps above.

Assessment Details Page -> Add Termination of Parental Rights

Termination of parental rights records must be updated for all individuals referred to a family drug treatment court program. Other program models are strongly encouraged to add these records, as appropriate. To add a termination of parental rights record, select Add Termination of Parental Rights from the list of options at Actions. See below for the Add Termination of Parental Rights webpage.

Complete all fields. Once each field has been updated and reviewed, the record may be saved. To add additional records, after clicking Save, click the hyperlinked Assessment Number, and repeat the steps above.

Once all applicable Add records have been updated, additional assessments can be completed on the Referral Details Page. To access the Referral Details Page, when on the Assessment Details Page, click the hyperlinked Referral Number. See below.

ACTIONS

Status

Case	
Referral	**Referral #: 85410**
Date Assessed	01/08/2019
Model	Adult Court
IsActive	Y

Eligibility

Eligible For Drug Court?	
Willing To Participate?	

Actions -> Perform RANT (Risk and Needs Triage)

All adult drug treatment court referrals must have a completed RANT on file prior to the referral being accepted as a new case. The Risk and Needs Triage (RANT®) tool yields an immediate and easily understandable report that classifies offenders into one of four risk/needs quadrants, each with different implications. It is a 19-question instrument that can be administered in less than 15 minutes by non-clinicians and requires no additional training. The RANT provides immediate scoring and recommendations that can be read easily and understood.

According to the RANT classification system, individuals who score:
- high risk/high need may be best suited for intensive supervision and clinical services.
- low risk/high need may be best suited for a lower level of criminal justice supervision, but more intensive clinical services.
- high risk/low need may require more intensive supervision and less intensive clinical services, and.
- low risk/low need may be best suited to a less intensive supervision, less intensive clinical prevention-based intervention.

To access the RANT, while on the Referral Details Page, select Perform RANT from the list of options at Actions. See below for the Perform RANT webpage.

Complete all 19 questions. Review all responses for accuracy prior to submitting the form. *Note: Once a RANT has been saved, no additional edits can be made.*

Once the RANT has been saved, the RANT Audit Details Page will load. See below for the RANT Audit Details Page.

The RANT Audit Details information is stored in the Database, but users may print a copy from this screen.

Click the hyperlinked Referral Number to be routed back to the Referral Details Page to enter additional referral information.

Actions -> Referral Offense

The referral offense is the offense that led the individual to being referred to the specialty docket programs. All referrals must contain at least one referral offense record prior to being accepted as a new case.

The Referral Offense grid is located at the bottom of the Referral Details Page. To expand the Referral Offense grid, click the plus sign to the right of Referral Offense. To add a new record, click Add New.

Complete all applicable fields. To add an offense, enter the first 8-10 characters of the offense, and select the appropriate option from the drop-down menu.

If there are multiple counts of the same offense, click the Add New button. Repeat the steps above. Save when completed.

See below for a completed record.

Actions -> Reject Referral

A referral may be rejected at any point during the referral process. To reject a referral, at Actions click Reject Referral. See below for the Reject Referral webpage.

« Back

Referral - Referral #: 85410

Please complete the following questions related to the rejection of this case

Date Rejected *

01/08/2019

Eligible for Drug Court: *

Select One ⌄

Reason Not Eligible

Select one ▾

Not Eligible as of:

Not Eligible Comment

Willing to Participate: *

Select One ⌄

The Date Rejected field automatically populates to the current date. Changes can be made manually or by using the pop-up calendar. The Willingness to Participate and Eligibility to Participate fields must be updated.

Users are strongly recommended to complete the entire Reject Referral form.

Actions -> Accept Case

To accept a referral as a new case, at Actions click Accept Case. See below for the Accept Case webpage.

« Back

Referral - Referral #: 85692

Please confirm below that the participant is both willing and eligible to be accepted into the Drug Court Program.

Accepted Date *

Eligible for Drug Court: *

Select One ⌄

Willing to Participate: *

Select One ⌄

Asterisk (*) fields are required.

CLEAR   SUBMIT

By clicking submit, you will generate a new case for the selected participant within the Drug Court Program.

The Date Accepted field automatically populates to the current date. Changes can be made manually or by using the pop-up calendar. The Willingness to Participate and Eligibility to Participate fields must be set to Yes prior to accepting the referral as a new case. Submit once the responses for each field have been reviewed.

Referral Details Page -> Accept Case Checklist
The following must be completed prior to accepting a referral as a new case.

- ✓ Person Profile
    - o Race, Ethnicity, Gender, DOB fields must be completed.
- ✓ Referral Info, Person Info, Key Dates, and Key People
- ✓ RANT – required for only adult drug treatment court referrals
- ✓ Diagnosis Record
- ✓ Drug History Record
- ✓ Referral Offense Record

Next
Once a referral has been accepted as a new case, the referral transitions to the Cases Module, and the Case Details Page will appear. See below for an example.

Note: You can review the participant's assessment and referral information at any time by clicking the blue hyperlinks at Referral Number and Assessment Number.

Cases

All case management related information may be entered in the Cases Module. To access the Cases Module, click Cases located at the top left of the homepage.

The default list of active cases will load.

These cases are <u>Active</u>. These cases have not been exited. Also, the cases have not been placed in an inactive status. To view any inactive cases, users can access the Filter task at Actions.

Cases are listed by last name and in alphabetical order. If the list of referrals is not listed in alphabetical order, click the Participant column heading.

This webpage contains the following hyperlinks and page redirects.

Case Number: This hyperlinked field contains the individual's Case Number. Clicking the Case Number will route to the Case Details Page. *Note: To update Phase, Status, Sanctions, Incentives, Drug Test Results, Compliance Reviews, Medication Assisted Treatment, and other case management data, click the hyperlinked Case Number.*

Color Code: This static field identifies the color assigned to the participant. *Note: Programs may use color codes to denote drug testing schedules, phases, or other case management related groupings.*

Participant: This hyperlinked field contains the participant's first and last name. Clicking the hyperlinked name will route users to the individual's Person Profile. The Person Profile is where contact and demographic information is entered, updated, and stored.

Program: This hyperlinked field contains the name of the specialty docket program in which the participant is enrolled. Clicking the hyperlinked program name will generate a list of localities serviced by the program.

Locality: This hyperlinked field identifies the locality where the participant resides.

Model: This static field identifies the specialty docket model to which the participant was referred. Options include: Adult Court, Juvenile Court, Family Court, DUI Court, Veterans Docket, and Behavioral Health Docket.

Date Accepted: This static field identifies the date the participant was accepted into the specialty docket program.

Case Phase: This static field identifies whether the case is in the Case Management or Follow-up case phase. All active cases should have a corresponding Case Phase of Case Management.

MAT End Date: This static field denotes the last day of the Medication Assisted Treatment prescription. *Note: This field should remain empty if there is no MAT record on file.*

Filter Cases

The Filter Cases webpage allows Database users to generate a customized list of cases based on various filter criteria. To access the Filter Cases webpage, while on the webpage that contains the default list of active cases, click Actions, then Filter. See below.

The Filter Cases page will load. Identify the filters needed.

Show Advanced is typically collapsed. To expand the list of filters, click Show Advanced. To generate the customized list of cases, click Filter. *Note: To generate a list of inactive cases, locate the Current Status field (sixth field on the left side). De-select Active. Click anywhere in the rectangular box and select the appropriate status from the list of options that populate. Click Filter.*

Inactive cases include those with the following statuses: Inactive, Absconder, Incarcerated, Residential Treatment, Administrative Probation, Aftercare, Did/Did Not Complete Drug Court, and Follow-up.

Case Details Page

Case management information is entered, stored, and edited in the Case Details Page. Also, the Case Details Page contains autogenerated participant statistics such as the number of days clean, longest days clean, and number of days in the program. To access the Case Details Page for a participant, click the hyperlinked Case Number.

Case management information may be added to the Case Details Page by using the tasks at Actions and the grids located at the bottom of the Case Detail Page.

See below for an example.

Case Details Page Reference Table

The reference table below may be used to identify the location of various tasks in the Cases Module.

The tasks in the first two columns can be accessed by clicking Actions.

The tasks in the last column can be accessed by scrolling to the bottom of the Case Details Page.

- **Actions - Edit**
  - Date Accepted
  - Status: Health Insurance and Mental Health Treatment
  - Court:
    - Docket Number
    - Color Code
    - Next Court Date
  - Restitution
  - Exit Information
    - Graduation Ceremony Date
    - Housing and Health Statuses at Discharge
- All fields can be edited.

- **Actions – Workflow & Add**
  - Case Summary
  - Update Phases
  - Update Status
  - Batch Enter Drug Tests
  - Enter Drug Test
  - Enter Intake/Follow-up Progress Assessments
  - Terminate
  - Add Compliance Reviews
  - *Add Attendance*
  - *Add Note*
  - *Add Attachment*

- **Cases Detail Page Grids/Tabs**
  - Cases Summary
  - * Drug Tests
  - * **Incentives**
  - * **Sanctions**
  - *Phases
  - *Statuses
  - * **Offenses**
  - * **Fees**
  - * **Supervision**
  - * **Community Service**
  - * **Medication Assisted Treatment (MAT)**
  - Compliance Reviews
  - *Compliance Statistics Report
  - * **Moral Reconation Treatment (MRT)**
  - * **Children**
  - * **Termination of Parental Rights (TPR)**
  - *TRP Court Date
  - Referrals

  * Edit existing records.
  Can Add New Records using the Tabs.

Actions -> Edit

The Edit screen contains miscellaneous case management information. See below.

Complete and update the fields as necessary. Save all updates.

Some programs receive HIDTA (High Intensity Drug Trafficking Area) funding. Denote the participants receiving services funded by HIDTA at Grants.

Note: Restitution Order should be set Yes only if the participant has been ordered by the court to pay restitution. If the field is set to Yes, a Payment and Fee Record must be added.

Actions -> Cases Summary

Cases Summary contains referral and case management information for the selected participant.

To view Case Management entries, click Show More. Case Management headings include:

- Case Phases
- Sanctions
- Incentives
- Community Service
- Drug Tests
- Fees and Payments
- Restitution

To filter results by days, select the appropriate option from the Days field, and then click Filter Report.

All cases must have updated phase records on file. To access the Update Phases task, while on the Case Details Page, click Actions. Then, click Update Phases.

The Update Case Phases webpage contains the fields listed below.

End Date of Previous Phase: This field denotes the end date of the previous phase. *Note: If the participant is entering phase one, this field should be blank.*

Start Date of New Phase: This field denotes the first date of the new phase.

New Phase Name: This field denotes the name of the phase. Select the most appropriate option. Options include: 0, 1, 2, 3, 4, 5.

Description: This field may be used to provide any additional information.

Review the responses for each field before saving.

All Update Phase records are stored in the grids located at the bottom of the Case Details Page.

Actions -> Update Status

To access the Update Status task, while on the Case Details Page, click Actions. Then, click Update Status.

The Update Case Status webpage contains the fields listed below.

End Date of Previous Status: This field denotes the end date of the previous status.

Start Date of New Status: This field denotes the first date of the new Status.

New Status Name: This field denotes the name of the status. Select the most appropriate option. Options include: Active, Absconder, Incarcerated, Residential Treatment, Administrative Probation, Aftercare. *Note: The initial Active status is autogenerated by the Database when a referral is accepted as a new case.*

Review the responses for each field before saving.

All Update Status records are stored in the grids located at the bottom of the Case Details Page.

See below for the definitions of each case status option.

CASE STATUS	DEFINITION
Active	The participant is currently active in the program.
Absconder	The participant has not attended any program related service for at least 14 days.
Incarcerated	The participant is currently incarcerated and will be incarcerated for more than 7 days. This **does not** include Incarceration Sanctions.
Residential Treatment	The participant is currently in a community or jail based residential treatment program.
Administrative Probation	The participant has graduated from the drug treatment court program but remains on the drug court roll and is under supervision by probation and/or treatment providers.
Aftercare	The participant is currently in the aftercare treatment component of the program.

If a participant has been assigned Incarceration as a Sanction, Do Not update his/her Case Status. Add a new Sanction Record. Do Not use the following statuses: Completed Drug Court; Did Not Complete Drug Court; Follow-up.

Actions -> Batch Enter Drug Test

The Batch Enter Drug Test task allows users to enter a multitude of drug test result records at once. To access the Batch Enter Drug Test task, while on the Case Details Page, click Actions. Then, click Batch Enter Drug Test. See below for an example of the Batch Enter Drug Test webpage.

Home > Home > Case Manager > 0CC-19-00110787

Batch Enter Drug Tests   SAVE & CONTINUE   SAVE

Test Date	Test Name	Drug Test Result	Number Of Tested Drugs	B.A.C.	Drugs Present	Comment	Actions

ADD NEW

To add each new drug test result records, click Add New. Enter all required information.

The Batch Enter Drug Tests webpage contains the fields listed below.

Test Date: This field contains the date the drug screen was administered. Dates be entered using the calendar or manually

Test Name: This field denotes the type of drug screen administered to the participant. Select the appropriate test type from the list of options (i.e. oral swab, urine screen, blood test, etc.)

Drug Test Result: This field denotes whether the drug screen was negative, positive, or administrative positive (i.e. the participant diluted a sample, failed show, etc.). *Note: If a participant is in the MAT program and receives a positive test for a prescribed MAT drug, select Positive, but make sure the participant's MAT record is updated with the prescribed drug. The system will code the "Positive" drug test result as a MAT Exception/Negative.*

Drugs Present: This field denotes the drugs found in the drug screen. This field is required if the drug test result is negative.

Only click Save when all new drug test result records have been entered.

All Batch Enter Drug Test records are stored in the grids located at the bottom of the Case Details Page.

Actions -> Enter Drug Test
The Enter Drug Test task allows users to enter a single drug test result record at a time. To access the Enter Drug Test task, while on the Case Details Page, click Actions. Then, click Enter Drug Test. See below for an example of the Enter Drug Test webpage.

Enter all the required information. The Drug Present field will only populate if the Drug Test Result field is Positive. Review all responses and save.

All Enter Drug Test records are stored in the grids located at the bottom of the Case Details Page.

Actions -> Add Compliance Reviews

Compliance Reviews should be completed each week. The Add Compliance Reviews task allows users to record the phase requirements, as well as whether the participant complies with the requirements. Requirements are based on the phase requirements listed in the specialty docket's Participant Handbook. Requirements include drug screens, docket participation, education, employment, curfew, community service, supervision, and therapy.

To access the Add Compliance Reviews task, while on the Case Details Page, click Actions. Then, click Add Compliance Reviews. Save once all fields have been completed.

See below for an example of the Add Compliance Reviews webpage.

Actions -> Add Attendance

The Add Attendance task allows users to record each participant's attendance at program and social events. To access the Add Attendance task, while on the Case Details Page, click Actions. Then, click Add Attendance. See below for an example of the Add Attendance webpage.

All Add Attendance records are stored in the grids located at the bottom of the Case Details Page.

Action -> Add Note

The Add Note task allows users to add case management notes. To access the Add Note task, while on the Case Details Page, click Actions. Then, click Add Note. See below for an example of the Add Note webpage.

All Add Note records are stored in the grids located at the bottom of the Case Details Page.

Action -> Add Attachment

The Add Attachment task allows users to enter attachments records. To access the Add Attachment task, while on the Case Details Page, click Actions. Then, click Add Attachment. See below for an example of the Add Attachment webpage.
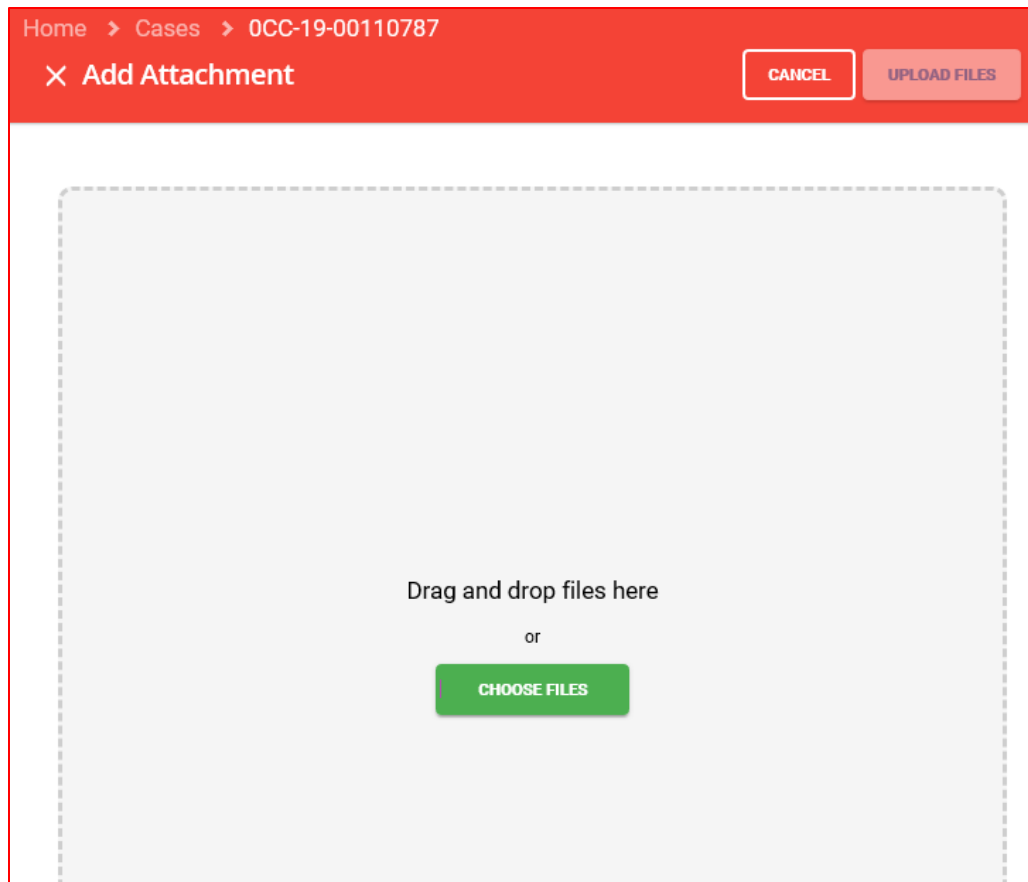
To add an attachment, drag the file to the grey box, or use the Choose Files option to upload. Once a file has been added, the Upload Files button will highlight. Click Upload Files.

All Add Attachment records are stored in the grids located at the bottom of the Case Details Page.

Action – Termination

The Termination task allows users to record program exits. To access the Termination task, while on the Case Details Page, click Actions. Then, click Termination. See below for an example of the Termination webpage.

« Back

Case - 161CC-18-00027333

Reason for Termination *

Select one   ▼

Exit Date

Asterisk (*) fields are required.

CLEAR   SUBMIT

Reason for Termination: This field identifies the reason for the participants departure from the specialty docket. Options include those listed below.

- Death
- Graduation/Successful Completion
- Withdrawal
- Program Closed
- Terminated – Absconding
- Terminated – Excessive Relapses
- Terminated – New Criminal Offense
- Terminated- Other
- Terminated – Permanency Goal Not Achieved
- Terminated – Repeated Minor Violations
- Terminated – Unsatisfactory Performance

Review all responses before saving.

Note: Once a participate is terminated, DO NOT update any case management information. If the participant re-enters your program, you must create a new referral. DO NOT re-open a terminated case.

Grids -> Offense

The Case Offense grid is located at the bottom of the Case Details Page. To expand the Offense grid, click the plus sign to the right of Case Offense. To add a new record, click Add New.

Complete all applicable fields. To add an offense, enter the first 8-10 characters of the offense, and select the appropriate option from the drop-down menu.

If there are multiple counts of the same offense, use the Add New button. Repeat the steps above. Save when completed.

To delete duplicate or incorrect Offense Records, click the X or trashcan under the Actions column.

See below for a completed record.

Grids -> Fees

All fees assessed by the specialty dockets and payments provided by the participant may be stored in the Fees grid. The Case Fees grid is located at the bottom of the Case Details Page. To expand the Case Fee grid, click the plus sign to the right of Case Fee. To add a new record, click Add New. Update each field.

A Fee must be added before Payments can be applied. To add a new Fee, click Add New. Begin at Fee Type and complete all fields. Be sure to Save each Fee. Once a Fee has been saved, the WF Actions (Add Payments) and Actions columns will populate. You may need to use the scroll bar to view these. See below for an example.

To add a Payment, locate the row of the appropriate fee and click Add Payment.

The window below will appear.

Fee - I-0553283   ✕

Payment Date *

01/01/2019

Payment Amount *

20.00

Payment Method *

Money Order ✕   ▾

Description

Asterisk (*) fields are required.

CLEAR   SUBMIT

After completing and reviewing the responses for the fields, save the record.

After the Payment has been saved, the Fee record will update. See below. Notice the Total Fee Amount field contains $50.00 for the Supervision Fee. The Paid Amount field contains a $20 payment, and the Remaining Balance field contains $30.

Case Fees [-]										SAVE
Number	Current Status	Phase	Fee Type	Fee Date	Total Fee Amount	Paid Amount	Balance Remaining	Description	WF Actions	Actions
I-0553283	Active	Some Payments Made ✕ ▾	Supe ✔	01/01/2019	$50.00	$20.00	$30.00	Monthly Drug Court Fee	ADD PAYMENT	✕ ▦
I-0553285	Active	Created ✕ ▾	Cour ✔	12/03/2018	$800.00	$0.00	$800.00	Court Fee	ADD PAYMENT	✕ ▦
		Created ✕ ▾	Sele ✔	01/10/2019						✕

ADD NEW

To delete Fees, click the X or Trashcan under the actions column.

To view Fee Invoices or to edit Payments, click the Case Detail icon under the Actions column. The page below will appear.

To delete any payment when on the Invoice webpage, click the trashcan under the Actions column.

To return to the Cases Detail page, click the hyperlinked Case Number.

Grids -> Case Supervision

All supervision records may be stored in the Case Supervision grid. The Case Supervision grid is located at the bottom of the Case Details Page. To expand the Case Supervision grid, click the plus sign to the right of Case Supervision. To add a new record, click Add New. Save when completed.

See below for an example.

Supervision Date: This field denotes the date the supervision activity was conducted.

Supervision Type: This field denotes the type of supervision administered. Select the most appropriate option. *Note: If additional information is needed, use the Comments box.*

Units of Service: This field denotes the number of hours of contact.

Provider: This field denotes the name of the specialty docket team member meeting with the participant.

To delete any duplicate or incorrect records, click the X or Trashcan under the Actions column. To edit records, click the edit icon under the Actions column.

Grids -> Case Community Service

All supervision records may be stored in the Case Community Service grid. The Case Community Service grid is located at the bottom of the Case Details Page. To expand the Case Community Service grid, click the plus sign to the right of Case Community Service. To add a new record, click Add New. Save when completed.

See below for an example.

Service Date: This field denotes the date the participant completed the community service activity.

Service Type: This field denotes the type of community service active completed by the participant. Select the most appropriate options from the list. *Note: If additional information is needed, use the Comments box.*

Non-Profit: This field identifies whether the community service was completed at a non-profit organization.

Hours: This field denotes the number of hours of community service the participant completed.

To delete any duplicate or incorrect records, click the X or Trashcan under the Actions column. To edit records, click the edit icon under the Actions column.

Grid -> Case Medication Assisted Treatment (MAT)

All Case MAT records may be stored in the Case MAT grid. The Case MAT grid is located at the bottom of the Case Details Page. To expand the Case MAT grid, click the plus sign to the right of Case MAT. To add a new record, click Add New. Save when completed.

See below for an example.

Prescription: This field denotes the name of the MAT prescription.

Start Date: This field denotes the first day of the MAT prescription.

End Date: The field denotes the expiration date of the MAT prescription.

Clinic: This field denotes the prescribing clinic or physician.

Comment: This field denotes any additional information.

Note: To ensure Drug Test Results and the Number of Days Clean fields populate, be sure MAT records are accurate and up to date.

To delete any duplicate or incorrect records, click the X or Trashcan under the Actions column. To edit records, click the edit icon under the Actions column.

Grids -> Case Moral Reconation Therapy (MRT)

All Case MRT records may be stored in the Case MRT grid. The Case MRT grid is located at the bottom of the Case Details Page. To expand the Case MRT grid, click the plus sign to the right of Case MRT. To add a new record, click Add New. Update each field. Save when completed.

See below for an example.

Step: This field denotes the MRT step.

Start Date: This field denotes the day the participant began the step.

End Date: The field denotes the date the participant completed the step.

Sessions: This field denotes the number of MRT sessions the participant spent on the Step.

Comments: This field denotes any additional information.

Note: If a participant spends more than one day on an MRT step, do not create multiple entries for the same step. Adjust the End Date and Sessions fields.

To delete any duplicate or incorrect records, click the X or Trashcan under the Actions column. To edit records, click the edit icon under the Actions column.

Grids -> Case Child

All child records may be stored in the Case Child grid. The Case Child grid is located at the bottom of the Case Details Page. To expand the Case Child grid, click the plus sign to the right of Case Child. To add a new record, click Add New. Update each field. Save when completed.

See below for an example.

Note: CASA refers to the Court Appointed Special Advocate.

Grids -> Case Termination of Parental Rights (TPR)

All TPR records may be stored in the Case TPR grid. The Case TPR grid is located at the bottom of the Case Details Page. To expand the Case TPR grid, click the plus sign to the right of Case TPR. To add a new record, click Add New. Update each field. Save when completed.

See below for an example.

To delete any duplicate or incorrect records, click the X or Trashcan under the Actions column. To edit records, click the edit icon under the Actions column.

Grids -> Case TPR Court Date

All TPR court date records may be stored in the Case TPR Court Date grid. The Case TPR Court Date grid is located at the bottom of the Case Details Page. To expand the Case TPR Court Date

grid, click the plus sign to the right of Case TPR Court Date. To add a new record, click Add New. Update each field. Save when completed.

To delete any duplicate or incorrect records, click the X or Trashcan under the Actions column. To edit records, click the edit icon under the Actions column.

Grids -> Referrals

Each participant's referral information is also stored at the bottom of the Case Details Page. To view the hyperlinks for the referral information, click the plus sign to the right of the Referrals label. The Referral Details Page and Assessment Details Page may be accessed by clicking the hyperlinked Referral and Assessment Numbers.

Note: Use the scroll bar to view the participant's RANT score.

Mass Update

The Mass Update Module increases efficiency by allowing users to enter compliance reviews and drug test results for multiple participants at once.

Mass Update -> Drug Test

The Mass Update Drug Test action allows users to enter drug test result records for multiple participants at once.

Complete the Test Date, Test Name, and # Drugs Tested fields. These will auto populate for the participants with a checkbox under the Tested column.

See below for an example.

Test Date: This field contains the date the drug screen was administered. Dates be entered using the calendar or manually

Test Name: This field denotes the type of drug screen administered to the participant. Select the appropriate test type from the list of options (i.e. oral swab, urine screen, blood test, etc.)

# of Drugs Tested: This field denotes the number of drugs for which the screen tests.

Drug Test Result: This field denotes whether the drug screen was negative, positive, or administrative positive (i.e. the participant diluted a sample, failed show, etc.). The field automatically populates to Negative. If Administrative Positive or Positive are needed, use the downward arrow. *Note: If a participant is in the MAT program and receives a positive test for a prescribed MAT drug, select Positive, but make sure the participant's MAT record is updated with the prescribed drug. The system will count the "Positive" as a MAT Exception/Negative.*

Drugs Present: This field denotes the drugs found in the drug screen. This field is required if the drug test result is negative.

Review all fields before saving.

Note: If your specialty docket program uses color codes to denote drug testing schedules, Click Filter to generate a list by code.

Mass Update -> Compliance Review

The Mass Update Compliance Reviews actions allow users to enter compliance reviews for multiple participants at once. There are two available tasks: Copy to New Week and Copy to Next Week.

Mass Update -> Compliance Review Copy to New Week

The Mass Update Compliance Review Copy to New Week action allows users to copy an existing compliance review to a new date. Set the new date at the New Review Date field. Identify the participants whose compliance reviews need to be copied to the new review date by checking the box located in the first column. Review the dates at New Week before saving.

See below for an example of the Copy to New Week screen.

Note: If the New Week field contains N/A, no compliance review record exists for the participant. The initial compliance review will need to be added manually.

Mass Update -> Compliance Review Copy to Next Week

The Mass Update Compliance Review Copy to Next Week action allows users to copy an existing compliance review to a date that is seven days from the last review date. Identify the participants whose compliance reviews need to be copied to the next week by checking the box located in the first column. Review the dates at New Week before saving.

See below for an example of the Copy to Next Week screen.

CANCEL   SAVE

Compliance Reviews will be created for each selected cases. Only selected cases on the current page, if more than one page is available, will be updated.

Copy To next Week
- This tool will copy the Compliance's Last Week and advance the date by 7 days, not to the current date today.
- Compliance entries will copied for all selected Cases using the checkboxes below.
- All fields except Description will be copied to Next Week.
- Please review the Last Week and Next Week dates before you Copy To Next Week.

☑	Last Review	New Week	Case No	Client	Locality	Court Model	Current Phase	Current Status
☑	11/06/2018	11/13/2018	0CC-18-00110777	Carter, Ross	Demo Locality	Adult Court	1	Active
☑	11/06/2018	11/13/2018	0CC-18-00110775	Harris, Roger	Demo Locality	Adult Court	1	Active
☑	N/A	N/A	0CC-18-00110780	Rogers, Elizabeth	Demo Locality	Adult Court	1	Active
☑	01/10/2019	1/17/2019	0CC-19-00110787	Rogers, Christian	Demo Locality	Adult Court	1	Active
☑	10/08/2018	10/15/2018	0CC-18-00110774	Smith, John	Demo Locality	Adult Court	2	Active
☑	N/A	N/A	0CC-18-00110784	Smith, John	Demo Locality	Adult Court		Active

Note: If the New Week field contains N/A, no compliance review record exists for the participant. The initial compliance review will need to be added manually.