

Chapter 5: Utility Screens

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Accessing Utility Screens

This section explains how to access screens through the Circuit Utility Maintenance Menu.

Overviews, accessing instructions, and field definitions are included for each of the following options:

- **County**
- **Attorney**
- **Code**
- **Case Type Codes**
- **Caseload Dispositions**
- **PACC**
- **PACC List**
- **ADR Location**
- **ADR Clerk Control**
- **Security File**
- **Security Listing**
- **Financial Location File**
- **AFP Outq Maintenance**
- **Courtroom Maintenance**
- **Case Reassignments**
- **Reporter/Recorder**

ACCESSING UTILITY SCREENS

Overview

The utility screens are used to maintain tables of codes and general information about your particular circuit court. The use of codes in the circuit court system standardizes circuit court record-keeping among all courts in the state using the system. These code files are loaded at software implementation by the Judicial Information Systems (JIS) and are maintained by the individual circuit courts on an as-needed basis to reflect any updates or additions to the codes.

Each circuit court should designate a "Project Administrator" who is responsible for updating the utility files whenever JIS issues a notification of changes or amendments. Through this process the files on each circuit court's computer system will always contain up-to-date attorney, action, and Prosecuting Attorneys Association of Michigan (PACC) codes.

Only the Project Administrator can access Utility screens. All utility screens can be accessed from the Circuit Utility Maintenance Menu; most of them can also be accessed from the Next Transaction Line. Both methods are described on the following pages.

CIRCUIT UTILITY MAINTENANCE MENU			
COUNTY			
LOCATION/CLERK			
ATTY/REP/REC			
CODE		TABLE	
PACC			
USER ID		COPY ID	
COUNTY	F1	SECURITY FILE	F11
ATTORNEY	F2 (ATT)	SECURITY LISTING	F12
CODE	F3 (COD)	FINANCIAL LOCATION FILE	F13
CODE LIST	F4	AFP OUTQ MAINTENANCE	F14
CASE TYPE CODES	F5	COURTROOM MAINTENANCE	F15
CASELOAD DISPOSTIONS	F6	CASE REASSIGNMENTS	F16
PACC	F7 (PAC)	REPORTER/RECORDER	F17
PACC LIST	F8		
ADR LOCATION	F9	DISPLAY PRINT	F23 (D P)
ADR CLERK CONTROL	F10	EXIT	F24 (EXT)

Sample Utility Menu Screen

Circuit Maintenance Menu

The Circuit Utility Maintenance Menu appears whenever the UTILITY MENU is selected from the Circuit Court Master Menu screen or exit one of the utility screens.

To access any of the utility screens, type the required data in the fields at the top of the screen and press the proper function key as listed on the menu. The following table lists the required fields and function keys.

Required Fields for Accessing Utility Screens

SCREEN	ACTION	REQUIRED FIELDS	FUNCTION KEY	NEXT
County File Maintenance	add update delete	COUNTY	F1	none
Attorney Bar File Maintenance	add update delete	ATTORNEY	F2	ATT
Code File Maintenance	add update delete print	CODE, TABLE	F3 F4	COD
Case Type Codes	add change delete	none	F5	
Caseload Dispositions	add change delete		F6	
PACC File Maintenance	add update delete print	PACC	F7 F8	PAC
ADR Location File Maintenance	add update delete	LOCATION	F9	none
ADR Clerk Control File Maintenance	add update delete	COUNTY	F10	none
Security File Maintenance	add update delete	USER ID	F11	none
Financial Location File Maintenance	add update delete	COUNTY LOCATION	F13	none

SCREEN	ACTION	REQUIRED FIELDS	FUNCTION KEY	NEXT
AFP OUTQ Maintenance	add update delete	none	F14	none
COURTROOM FILE MAINTENANCE	add	none	F15	none
CASE REASSIGNMENTS		COUNTY	F16	none

Field Definitions

The fields on the Circuit Utility Maintenance Menu are defined below:

COUNTY	This field serves three (2) functions: County File, and Financial Location File maintenance.
LOCATION	This field serves two (3) functions: ADR Clerk Control, ADR Location and Financial Location File maintenance.
ATTORNEY	State of Michigan Bar number (P-number) for lawyers and information maintained by the county.
CODE	Specific code to be added or modified.
TABLE	Specify the table of the code to be added or modified: 1 = clerk events 2 = clerk/court next action 3 = court events 4 = court results 5 = case status codes 6 = alternate name codes 7 = ADR clerk event codes
PACC	Specific PACC charge code to be added or updated.
USER ID	User ID assigned for access to the system.
	More details about accessing particular screens are presented in the sections of this chapter which discuss each screen.
COPY ID	This field can be used to create a security record for a user who will need the same or similar authority to options as a user already in the security file. Enter the user id of the new user in the userid field on the maintenance menu, then enter the user id of the user already in the system in the COPY ID field, then press [F11] . A new security record will be created for the new user.

Printing a Security Listing

To print a listing of the security file, press **[F12]** on the utility maintenance menu. A security listing can also be printed for one user id by entering the desired user id on the utility maintenance menu, then press **[F12]**.

F2=ADD	F1=EXIT					
NEXT ____	ATTNY _____	CODE ____	TABLE ____	PACC ____	.	_____

Sample Next Transaction Line

Next Transaction Line

The Next Transaction Line can be used to access the attorney, code table, and PACC utility screens.

When a utility screen is displayed, all fields on the Next Transaction Line are blank. To access a screen from the Next Transaction Line, type the screen code in the NEXT field, type the other required fields, and press the appropriate function key.

The definitions for the fields on the Next Transaction Line are the same as for those on the Circuit Utility Maintenance Menu.

COUNTY FILE MAINTENANCE

Overview

The County File Maintenance screen is used to add or modify information about the user's circuit court and each county in that circuit. This information includes addresses of the court facilities, telephone numbers, the circuit judges' bar numbers, and the district numbers of lower courts. When a prosecutor changes, his/her pending criminal cases need to be re-assigned to the new prosecutor. This is done when the prosecutor's P-number is changed to another P-number on this screen. The message "CAUTION: MAY TAKE LONG - ALL CIRCUIT USERS MUST BE SIGNED OFF. [F3] TO CONFIRM" will be displayed. [F1] will discontinue this request. The flashing message will remain until all appropriate files have been changed. **It is advised that this modification be used with caution. Execute only after a file backup has been done.**

COUNTY FILE MAINTENANCE									
CIRCUIT	48	COURT CODE/TYPE:	099C						
COUNTY	99	OTHERS IN CIRCUIT:	COUNTY 2	__	COUNTY 3	__	COUNTY 4	__	
ORI NUMBER	990012J								
CIRCUIT NAME	TEST CIRCUIT COURT								
COUNTY NAME	PLEASANT COUNTY								
COUNTY ADDRESS	123 SUNNY DRIVE								
COUNTY ADDRESS 2									
COUNTY CITY	ANYWHERE			ST	MI	ZIP	47777		
COUNTY PHONE	888 3391547								
CIRCUIT JUDGES	10571	B	CC01	2	19226	R	CC01	3	4
ALPHA IDS AND	5	__	__	6	__	__	7	__	8
COURTROOMS	9	__	__	10	__	__	11	__	12
	13	__	__	14	__	__	15	__	16
	17	__	__	18	__	__	19	__	20
PROSECUTOR	14510		ATTORNEY CONFLICT (Y/N) N						
LOWER COURT	1	D78	2	D79	3	__	4	__	
F3=MODIFY F4=DELETE F1=EXIT NEXT __ ATTNY __ CODE __ TABLE __ PACC __ .									

Sample County File Screen

Accessing the Screen

The Project Administrator can access the County File Maintenance screen only for his/her circuit and only from the Circuit Utility Maintenance Menu. To access the County File Maintenance screen, type the numerical code for a county in your circuit in the COUNTY field and press [F1]. The County File Maintenance screen appears with any previously entered data about the specified county. All fields except CIRCUIT and COUNTY1 are blank if a new county is being added. To update or

add information in the circuit file, simply type the relevant information in each field and press the appropriate command key.

Field Definitions

The following fields are found on the County File Maintenance screen:

CIRCUIT	Circuit court number designated by user's sign-on ID.
COUNTY	County number entered in the COUNTY field on the Circuit Maintenance Menu. Information maintained on this screen applies only to this county.
OTHERS IN CIRCUIT: COUNTY2-COUNTY4	Number for any other county in a multi county circuit.
COURT CODE/TYPE	Three position numeric city code showing the court location, the fourth position is a letter denoting the type of court (C= Circuit). This is used by the Secretary of State for all abstracts created on the circuit system.
ORI NUMBER	Circuit ORI number to print on criminal Circuit Court Forms.
CIRCUIT NAME	Official name of your circuit court (e.g., 18th Judicial Circuit).
COUNTY NAME	Name of the county.
COUNTY ADDRESS	First line of the county's mailing address.
COUNTY ADDRESS2	Second line of the county's mailing address.
COUNTY CITY	County's city.
ST/ZIP	County's state and ZIP code.
COUNTY TELEPHONE	County's area code and telephone number.
CIRCUIT JUDGE1-20	P-number (from the Attorney Bar File) for each judge in the circuit.
JUDGE ALPHA DESIGNATION	Alpha identifier assigned to each judge in the circuit.
COURTROOM	Default Courtroom of the Judge. This field will be displayed on the clerk and court/disposition screen in the next action area.
PROSECUTOR	P-number (from the Attorney Bar File) for the prosecuting attorney.

ATTORNEY CONFLICT	Enter a 'Y' here to get a warning message to be displayed when entering a next action on the clerk and court/disposition screens when an attorney conflict occurs. The conflict will be date and time specific, and will only occur if the calendar event already scheduled is a ADR hearing or a trial (category type 'TRL').
LOWER COURT 1-4	District number of each lower court which is part of your circuit.

ATTORNEY BAR FILE MAINTENANCE

Overview

The Attorney Bar File Maintenance window contains a list of Michigan bar numbers (P-numbers) and information about each attorney. The data includes name, address, telephone numbers, and attorney type. This file is also used by other JIS applications.

The list of attorneys maintained with this screen is the same list that can be viewed by all system users on the attorneys screen from the Circuit Case Management System menu.

```

      Professionals Selection by Name
Position to: _____
1=Select  2=Change  4=Delete  5=Display
Opt  Bar#  Name
  _  34306  AARDEMA,ROBERT B.,
  _  10003  AARON,JERALD N.,
  _  34677  AARON,JODY L.,
  _  47036  AARON,JONATHAN S.,
  _  35605  AARON,RICHARD J.,
  _  46755  AARON,SANFORD J.,
  _  10004  ABATE,MICHAEL D.,
                                     More..
F3=Exit  F6=Add  F7=Alt Seq  Roll/Page

```

Sample Attorney Bar File

The attorney file is a shared JIS application. It is maintained at the local level with periodic updates from JIS. When a change is made to an attorney's record, a date stamp is added to the record.

If there is an update on this file, a comparison is made between the date on the record at the court location and the date in the update file. The record with the most current date will be added to the file.

Accessing the Screen

The Attorney Bar File Maintenance window can be accessed from either the Circuit Utility Maintenance Menu or the Next Transaction Line on another utility screen. To access this screen, enter the P-number of the attorney intending to add or modify in the ATTORNEY field and press **[F2]**. The Professionals Selection by Name window appears with a list of attorneys and their bar

numbers. If adding a new attorney press the **F6** function key, the Professional Details window appears. Enter the desired data in each field and press the **[ENTER]** key. To modify, delete or display the details for an attorney, type the appropriate option number in the option field next to the desired record and press the **[ENTER]** key.

Field Definitions

The following fields are found on the Attorney Bar File Maintenance screen:

ADD	Professional Details	
Bar No.:	_____	Type: _
Last Name:	_____	
First & MI:	_____	Name Sfx: ____
Address:	_____	

Firm:	_____	
Telephone:	__ __ __	Ext. ____
FAX:	__ __ __	
E-Mail:	_____	
Mail Code:	_____	
Last Chgd:	_____	Chg by:
HELP	<u>F3</u> =Exit	Enter=Update

Sample Attorney Maintenance Add Screen

BAR NO.	State of Michigan bar number assigned to the attorney.
ATTORNEY TYPE	Code designating the type of attorney. J = Judge Blank= Attorney
LAST NAME ONLY	Attorney's last name.
FIRST & MI	Attorney's first name and initial.
ADDRESS	Two address lines for the attorney's mailing address.
CITY, STATE, ZIP	Unlabeled field for the city, state and zip code for the attorneys address.

FIRM	Name of Law Firm.
TELEPHONE	Attorney's area code, telephone number.
EXTN	Attorney's extension number.
FAX	Attorney's area code and facsimile number.
E-MAIL	Attorney's electronic mail address.
MAIL CODE	Up to a 5 character code. This can be used to sort notices going to different attorneys at one law firm.

CODE FILE MAINTENANCE

Overview

The Code File Maintenance screen is used to add or update the system's code tables. This code file is loaded at software implementation and should be updated as advised by JIS. See Appendix A for current codes and related tables.

CIRCUIT	CODE FILE MAINTENANCE	
CODE TABLE NO.	1	
CODE ENTRY	SAC	
LONG DESC.	<u>SUMMONS AND COMPLAINT</u>	
SHORT DESC.	<u>SUM/COMPLAIN</u>	
CASE TYPE ASSOC.	___	
CLOSE/DISP PROCESS	___	
SCAO REPORT LINE	___	
	LINE #	DISPOSITIONS RESULTING FROM
	50	Jury Verdicts
	60	Non-Jury Verdicts
	70	Guilty Pleas, Defaults, Uncontested, Settled
	80	Removal/Transfers
	90	No Progress Dismissals (GCR501.3)
	100	Non Service Dismissals (GCR102.5)
	110	Dismissals
	120	Other Dispositions
F3 =MODIFY	F4 =DELETE	F1 =EXIT
NEXT ___	ATTNY _____	CODE ___ TABLE ___ PACC ___ . _____

Sample Code File Maintenance Screen

Accessing the Screen

The Code File Maintenance screen can be accessed from either the Circuit Utility Maintenance Menu or the Next Transaction Line on another utility screen. To access this screen, type the code you want to add or update in the CODE field and the number of the table which includes the code in the TABLE field. Then press the **F3** function key. The Code File Maintenance screen appears with information about the specified code. If adding a new code, all fields except CODE TABLE NO. and CODE ENTRY are blank.

To update or add information in a code table, simply type the desired data in each field and press the correct function key. Although the Code File Maintenance screen appears the same regardless of which table you are maintaining, some tables do not

use all fields. The following example indicates the fields in which you may enter data for each table.

USE THESE FIELDS

Code Table	Long Desc.	Short Desc.	Case Type Assoc.	*Category Type	*SCAO Report Line
1	X	X	X	X	X
2	X	X	X	X	
3	X	X	X	X	
4	X	X	X	X	X
5		X			
6	X	X			

*Caution: These fields should be used as prescribed by JIS only.

Code Table Required Fields

Field Definitions

The following fields are found on the Code File Maintenance screen:

CODE TABLE NO.	Number of the code table you have accessed.
CODE ENTRY	Code you are adding or updating (e.g., "DFT").
LONG DESC.	Official "long description" of the code you are entering or updating (e.g., "Defendant Found in Default"). NOTE: Each line will display/print up to 35 characters.
SHORT DESC.	Official "short description" of the code you are entering or amending (e.g., "Default").
CASE TYPE ASSOC.	Indicates with which type of cases the code may be used: -CRM = criminal only -CIV = civil only -blank = criminal or civil
CATEGORY	This variable field changes as the requested code table changes to define more clearly the use of this field. -Code Table 1 = Close/Disp Process (ie HDR, DFR, CLO) -Code Table 2 or 3 = Category

-Code Table 4 = (ie TRL, HRG, PTH)
Disposition
(ie DSP or blank)

CLOSE/DISP Indicates whether the action or event code is used to:

- HDR = update case header and reopen file data
- ROS = update party service data
- ANS = update party answer data
- DSP = update party or charge disposition data
- CLO = update case header's close file data
- HRG = used to designate an action hearing
- TRL = used to designate a trial.

NOTE: The header for this field changes dependant upon which code table is requested (see above).

SCAO REPORT LINE Indicates on which line of the Circuit Court Caseload (SCAO) Report (prior to 2002) the event or action will be tallied. Valid line numbers and descriptions are listed on the right side of the screen.

PRINT ON NOTICE Y/N This is on Code Table 6 only. If the alternate name is to print on the notice, enter Y in this field. If it is not to print on the notice, enter N in this field.

Printing a Code List To print a listing of the code tables, press **[F4]** on the Utility Maintenance Menu.

CASE TYPE CODES

Access to the Case Type Code Maintenance file is defaulted to 'N' (No) for all users. Please contact JIS for assistance when case types need to be added or modified.

CASELOAD DISPOSITIONS

Access to the Caseload Disposition Codes is defaulted to 'N' (No) for all users. Please contact JIS for assistance when case types need to be added or modified.

PACC FILE MAINTENANCE

Overview

The PACC File Maintenance Screens are used to update or add charge numbers from the Prosecuting Attorneys Coordinating Council (PACC) Manual. This file is loaded at software implementation and updated periodically as changes or amendments are initiated by the association. Other JIS applications use this file also.

MODIFY	
Pacc No: <u>750 110</u> _____	
Description	
Short: <u>B&E BUILDING W/INTENT</u> _____	
Long: <u>BREAKING & ENTERING A BUILDING WITH INTENT</u> _____	
Adult CHR flag: <u>X</u> Abstractable: <u> </u>	
Juv CHR flag: <u>X</u> Suspendable: <u> </u>	
Drunk Fund: SOS Code: <u> </u>	
Drug Fund: Civil Inf/Misd/Felony: <u>F</u>	
Crime Victims: <u>X</u> License Registration: <u> </u>	
Crime Group: Sex Offender Registration: <u> </u>	
DNA Testing: HIV Testing: <u> </u>	
Expired date: _____	
Last updated by: PACCFIX Last updated Date: 3/08/2005	
HELP <u>F3</u> =Exit Enter=Update	

Sample PACC File Maintenance Screen

Accessing the Screen

The PACC Code Window can be accessed from either the Circuit Utility Maintenance Menu or the Next Transaction Line of another utility screen. To access the screen, type the PACC Manual number you want to add or update in the PACC Number field and press **[F7]**. The PACC Code Window appears which will allow you to access a specific charge to change the current information or display a new PACC code update screen to add information for a new charge. If adding a new charge, all fields except PACC NUMBER are blank. To update or add information to the PACC File, simply type the desired data in each field and press the appropriate function key.

Field Definitions

The following fields appear on the PACC code update screen:

PACC NUMBER	Charge number from the PACC Manual as entered on the menu.
-------------	--

SHORT DESCRIPTION	PACC Manual's "short definition" or abbreviation for a charge.
LONG DESCRIPTION	PACC Manual's "long" or more complete definition and description of a charge.
ADULT CHR FLAG	X in this field means it is reportable to CHR as an adult offense. The Bench Guide indicates 'A' when Adult CHR is applicable.
JUVENILE CHR FLAG	X in this field means it is reportable to CHR as a juvenile offense. The Bench Guide indicates 'J' when Juvenile CHR is applicable.
DRUNK FUND	X in this field means it is reported on the Drunk Driving Report for reimbursement from the Drunk Driving Caseflow Assistance Fund. The Summary of Drunk Driving and Drug Cases, SCAO 24 indicates the applicable PACC codes.
DRUG FUND	X in this field means it is reported on the Drug Report for reimbursement from the Drug Case Information Management Fund. The Summary of Drunk Driving and Drug Cases, SCAO 24 indicates the applicable PACC codes.
CRIME VICTIMS	X or S in this field means it is assessable for Crime Victims Rights. The Bench Guide indicates 'V' when Crime Victims Rights are applicable. Enter an ' X ' for felonies or serious misdemeanors. Enter an ' S ' for a specified charge.
CRIME GROUP	The Crime Group from the Sentencing Guidelines.
DNA TESTING	Enter an ' X ' when DNA testing is ordered. MCL 28.176(4) indicates that "DNA sampling must be ordered on convictions for all felonies."
EXPIRED DATE	Expiration date of a PACC code that is no longer active. Expired PACC codes can still be entered as long as the Offense date is prior to the expiration date.
LAST UPDATED BY	The user id of the last person that updated the PACC code. The system will automatically fill this in when a modification has been made.
ABSTRACTABLE	X in this field indicates whether it is abstractable to SOS. Leave blank if not abstractable. The SOS Court Manual indicates when a charge is abstractable.

SUSPENDABLE	X in this field indicates that the license should be suspended. Leave blank if not suspendable. The SOS Court Manual indicates when a charge is suspendable.
SOS CODE	A 4 digit number in this field indicates the Secretary of State Code for that crime. The code can be found in the SOS Court Manual.
CIVIL INF/MISD/FELONY	The letter in this field specifies the type of charge: C = Civil Infraction M = Misdemeanor (District Court) H = High misdemeanor (Circuit Court) F = Felony (Circuit Court) O = Other V = Civil
LICENSE & REGISTRATION	X in this field indicates if it is a crime that a professional, such as a doctor, can lose his/her license. Leave blank if not.
SEX OFFENDER REGISTRATION	X in this field indicates if it is a crime that registers the defendant as a sex offender if convicted. Leave blank if not.
HIV TESTING	X in this field indicates if it is a crime where HIV testing should be ordered. Leave blank if not.
LAST UPDATED DATE	Indicates the last date the PACC code was modified. The system will automatically fill this in when a modification is made.
<u>Printing a PACC List</u>	To print a listing of the PACC file, press [F6] on the Circuit Utility Maintenance Menu.

ADR LOCATION FILE MAINTENANCE

Overview

The ADR Location File Maintenance screen is used to add or modify information pertaining to the locations for ADR hearings. Up to 99 locations with different address information may be entered. A ADR notice comment (12 lines of 70 characters) is available to enter instructions for the ADR parties. These comments will be printed on the notice.

CIRCUIT	48	ADR LOCATION FILE MAINTENANCE	LOCATION NO.	1
NAME	PLEASANT COUNTY COURTHOUSE			
ADDRESS	CONFERENCE ROOM 4	123 SUNNY DRIVE		
CITY	ANYWHERE	ST MI	ZIP 47777	
PHONE	800 1234567	EXT	101	
PURSUANT TO MCR 2.403, 1997, YOU ARE REQUIRED TO:				
1. FEES: WITHIN 14 DAYS AFTER THE MAILING OF THE NOTICE EACH PARTY				
MUST SEND \$75.00 MADE PAYABLE TO THE ADRERK.				
2. AT LEAST 14 DAYS PRIOR TO HEARING, EACH PARTY SHALL SUBMIT TO THE				
ADR CLERK. (3) COPIES OF ALL DOCUMENTS PERTAINING TO THE EVALUATION. ISSUES				
AND (3) COPIES OF THE CONCISE BRIEF SETTING FORTH THAT PARTIES				
FACTUAL OR LEGAL POSITION ON ISSUES PRESENTED BY THIS ACTION. IN				
ADDITION (1) COPY MUST BE SERVED ON EACH ATTORNEY OF RECORD.				
3. FAILURE TO FILE THE REQUIRED MATERIALS WITH THE ADR CLERK OR SERVE				
COPIES ON EACH ATTORNEY OF RECORD IN THE TIME REQUIRED BY LAW				
SUBJECTS THE OFFENDING ATTORNEY OR PARTY TO A \$150.00 PENALTY FEE.				
F3=MODIFY F4=DELETE F1=EXIT				
NEXT ___ ATTNY _____ CODE ___ TABLE ___ PACC ___ . _____				

Sample ADR Location File Screen

Accessing the Screen

The Project Administrator can access the ADR Location File Maintenance Screen only for his/her circuit and only from the Circuit Utility Maintenance Menu. To access the ADR Location File, enter the location number in the Location field and press **[F9]**. The Location File Maintenance screen appears with any previously entered data about the specified location. All fields except CIRCUIT and LOCATION are blank if you are adding a new location. To add or modify information in the location file, simply enter the relevant information in each field and press the appropriate function key.

Field Definitions

The following fields are found on the ADR Location File Maintenance screen:

CIRCUIT	Circuit court number designated by user's sign-on ID.
LOCATION	Location number (1-99) entered in the LOCATION field on the Circuit Utility Maintenance Menu. This is the location currently being maintained.
LOCATION NAME	Official name of the circuit court (e.g., 18th Judicial Circuit).
LOCATION ADDRESS	First line of the hearing location's mailing address.
LOCATION ADDRESS2	Second line of the hearing location's mailing address.
LOCATION CITY	The city of the hearing location.
ST/ZIP	State and ZIP code of the hearing location.
LOCATION PHONE	Area code and telephone number of the hearing location.
EXT.	Extension number of the telephone number of the hearing location.
ADR COMMENT FOR LOCATION	The comments and instructions that would appear on a case evaluation notice for a case number with a corresponding location. (12 lines of 70 characters).

ADR CLERK CONTROL FILE MAINTENANCE

Overview

The ADR Clerk Control File Maintenance screen is used to add or update the ADR Clerk's address and telephone number for a circuit. This information is printed on the top of the Notice of ADR Evaluation.

Accessing the Screen

The ADR Control File Maintenance screen can be accessed from the Circuit Utility Maintenance menu by entering the clerk's number and pressing **[F10]**. The circuit number will appear automatically at the top of the screen. If you are adding, all fields will be blank except the circuit number. Enter the information in each field and press the appropriate function key.

```

                                ADR CLERK CONTROL FILE MAINTENANCE
CIRCUIT NO.      48
CLERK NO.       1

NAME             ARLENA CRAVEN
ADDRESS          PLEASANT COUNTY ADR CLERK
ADDRESS-2       123 SUNNY DRIVE
CITY             ANYWHERE          ST MI  ZIP  47777
PHONE           800 1234567  EXT  101

F3=MODIFY      F4=DELETE      F1=EXIT
NEXT ___ ATTNY _____ CODE ___ TABLE ___ PACC ___ . _____

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Sample ADR Clerk Control Screen

Field Definitions

The following fields are found on the ADR Control File Maintenance screen:

CIRCUIT	Circuit court number designated by user's sign-on ID (display only).
CLERK NO	ADR Clerk number, usually "1" unless the circuit has more than one ADR clerk.
NAME	Official name or title of your circuit court (e.g., 18th Judicial Circuit).
ADDRESS	First line of the ADR clerk's mailing address.
ADDRESS-2	Second line of the ADR clerk's mailing address.
CITY	ADR clerk's city.
ST/ZIP	State and ZIP code for ADR clerk.
PHONE/EXT	ADR clerk's area code, telephone number, and extension number.

SECURITY FILE MAINTENANCE

Overview

The Security File Maintenance screens are used to secure access from individual screens and reports available on all the circuit menus. A security record must be added for each user. The device description for assigned printers and output queues also should be entered. A multi-county circuit residing on the same computer, using the same circuit files, may secure each user only to his/her county's data. However, a circuit court administrator may have the ability to inquire, update, and report for all counties in the circuit as determined by the user's security record. **NOTE:** Four screens will be displayed.

Accessing the Screens

The Project Administrator should be the only user given access to this screen. To access the Security File Maintenance screen, type the USER ID (CXX¹ XX² XXX³) and press **[F11]**. The Security File Maintenance screen appears with any previously entered data pertaining to the USER ID specified. All fields, except USER ID are blank if adding. To modify or add additional security access, type the relevant information in each field and press **[ENTER]** for the next screen to appear. Continue this procedure on each security screen until the fourth screen is displayed. Press the appropriate function key to add or modify the record.

USER ID is comprised of

- ¹Circuit Court Number
- ²County Number
- ³User's initials

CXX¹ XX² XXX³ = C9903ABC

Circuit Court Program Access		Page 1 of 4
Security File Maintenance		
User Id:	C9948ABC	
User Name:	ANABELLE CRUTHERS	
Description:	CIRCUIT COURT CLERK	
Assign printer and output queue for interactive, batch, and receipt output.		
Interactive Printer/Outq:	PRT000	/ PRT000
Batch Printer/Outq:	PRT000	/ PRT000
Receipt Printer/Outq:	RECEIPTPRT	/ RECEIPTPRT
Grant access - Y/Deny access - N		
<u>N</u> Central Name Indexes	<u>N</u> Central Calendar	
<u>N</u> Multi-County	<u>N</u> Non-public Case	
<u>N</u> Report Generator	<u>N</u> ADR Report Gen	<u>N</u> CHR Extract Menu
<u>N</u> Sentencing Guidelines	<u>N</u> Prosecutor Interface	<u>N</u> Abstracts
<u>N</u> Probation Menu		<u>N</u> Abstract Media
<u>N</u> Multi-Financial Location	Financial Location: <u>1</u>	Cashier Id:
		Verify Id:
F1=Exit	PRESS ENTER TO CONTINUE	

Sample Security File Maintenance Screen page 1

Field Definitions - Screen 1

USER ID	The user identification code which designates the user's origination for circuit number and county number. The last 3 characters shall be the user's initials.
USER NAME	Name of user. This information, up to 16 characters, is printed above the date and run time when the user generates any reports.
DESCRIPTION	Job title or location of user.
	ASSIGNED SPOOLED OUTPUT QUEUE AND PRINTER FOR BATCH AND INTERACTIVE REPORTS
INTERACTIVE PRINTER:	The printer device name for interactive reports. This is generally an 8X11 letter quality printer. Interactive reports are requested from the Case Management Menu and any print key request.

INTERACTIVE OUTQ:	The output queue to be attached to the interactive printer. When the F23 (display print) option is taken on the Case Management Menu this outq will display.
BATCH PRINTER:	The printer device name for batch reports. This is generally a high speed printer, or possibly the same printer specified for the interactive printer. Batch reports are requested from the Batch Report, Utility, and Financial Menus.
BATCH OUTQ:	The output queue to be attached to the batch printer. When F23 is pressed on the Report, Utility, or Financial Menus this outq will be displayed.
RECEIPT PRINTER:	The printer device name for printing cash receipts.
RECEIPT OUTQ:	The output queue to be attached to the receipt printer. When F22 is pressed on the Case Management Screen this outq will be displayed.
	Grant access = Y Deny access = N
CENTRAL NAME INDEX	Grant or deny access into the Central Name Index which will allow users inquiry into all other JIS court applications. Grant or deny access into the Central Probate Index which will allow users inquiry into JIS Circuit and Probate applications.
CENTRAL CALENDAR	Grant or deny access to display or print Central Calendar.
MULTI-COUNTY ACCESS	Enter N to secure specified user to his/her own county's information. Y permits access to other county information residing in his/her circuit files. This is only available to multi county circuits.
NON-PUBLIC CASE	Enter N to secure specified user from a register of actions of a non-public case. See Appendix D for displayed message. Y permits user access to a register of actions of a non-public case.
REPORT GENERATOR	Enter N to secure specified user from using the Report Generator Menu. Y permits user access to the Report Generator Menu.
ADR REPORT GENERATOR	Enter N to secure specified user from using the ADR Report Generator Menu. Y permits user access to the ADR Report Generator Menu.

PROBATION MENU	Enter N to secure specified user from using the Probation Menu. Y permits user access to the Probation Menu.
CHR EXTRACT MENU	Enter N to secure specified user from using the CHR Extract Menu. Y permits user access to the CHR Extract menu.
SENTENCING GUIDELINES	Enter N to secure specified user from using the Sentencing Guidelines. This option is no longer used.
PROSECUTOR INTERFACE	Enter N to secure specified user from using the Prosecutor Interface. Y permits user access to the Prosecutor Interface.
ABSTRACTS	Enter N to secure specified user from using the abstract menu. Y permits user access to the Abstract menu.
ABSTRACT MEDIA	Enter N to secure specified user from using the Create Abstract Media, Re-create Abstract Media and Purge Abstracts options from the Abstract Reporting Menu. Y permits user access to the Abstract Media.
MULTI-FINANCIAL LOCATION	Enter N to secure specified user to his/her own financial location. Y permits access to other financial locations within the Circuit.
FINANCIAL LOCATION	Enter the default financial location for this user. This location will be used for financial activity in the circuit court system. The financial location may be overridden within the circuit court system only if the user has Multi-Financial Location Access.
CASHIER ID	A unique three character cashier ID will be used by users with access to court and non-court cash receipting functions. This is a non-display field so the user must remember their cashier ID (similar to a user password). When initiating this function the VERIFY ID field must also be used. DO NOT enter user's initials.
VERIFY ID	The VERIFY ID field is also a non-display field that will be used to ensure the cashier id entered is what the user intends it to be.

User Id: C9948ABC	Circuit Court Program Access Security File Maintenance	Page 2 of 4
Grant access by Menu or Program - Y or blank, Deny access - N		
<input checked="" type="checkbox"/> Case Management Menu - Page 1		
- OR -		
_ Name	_ Case Header	<u>N</u> Case Deletes
_ Case Transfers	_ Charge	_ Party
_ Clerk _ Cash Only	_ Action/Court	_ Case ROA
_ Calendar Inquiry	_ Calendar Update	_ Calendar Block
_ Name Inquiry	<u>N</u> Alt Dispute Res	_ Attorney Inquiry
_ Cash	_ Labels	<u>N</u> Rest/Bond Init (RS)
<u>N</u> View Images	<u>N</u> Scan Images	
_ Case Management Menu - Page 2 (Forms)		
- OR -		
_ Criminal Forms	_ Civil Forms	
_ Bond Forms	_ Warrant / Show Cause Forms	
_ Court Notices	<u>N</u> ADR Notices	
_ Miscellaneous Forms		
PRESS ENTER TO CONTINUE		ROLL UP=PREVIOUS PAGE

Sample Security File Maintenance Screen page 2

**CASE MANAGEMENT
MENU 1 and 2**

Enter **N** to secure access from all options on the Case Management Menu. **Y** allows access to all options on this menu for the specified user.

-OR-

Enter **N** on any options that appear under the Case Management Menu to secure access from the specified user. **Y** or blank allows the specified user access to the corresponding program.

NOTE: ADR screens and ADR Notices default is **N** when adding a security record.

```

User Id:  C9948ABC          Circuit Court Program Access          Page 3 of 4
                Security File Maintenance

Grant access by Menu or Program - Y or blank, Deny access - N

█ Batch Report Menu - Page 1
- OR -
_ Numeric Case List          _ Alpha Case List          _ Courtroom Calendar
_ Caseload                   _ 2002 Caseload           _ Case Review
_ Audit List                  _ ADR Reports              _ Trial Activity
_ Speedy Trial                 _ Case Age

_ Batch Report Menu - Page 2
- OR -
_ Case Distribution           _ Pending Criminal         _ Pending Civil
_ Lack of Progress           _ Entry Fees Not Paid     _ Post Judgment Report

PRESS ENTER TO CONTINUE          ROLL UP=PREVIOUS PAGE

```

Sample Security File Maintenance page 3

BATCH REPORT MENU 1: Enter **N** to secure access from all options on the Batch Report Menu. **Y** allows access to all options on this menu for the specified user.

AND 2: Enter **N** on any options that appear under the Batch Report Menu that needs to be secured from the specified user. See Appendix D for the message displayed. **Y** or blank allows the specified user access to the corresponding program/report.

NOTE: ADR Reports default is **N** when adding a security record.

Caseload was replaced with 2002 Caseload and should no longer be used. Therefore, each user should have an N for caseload.

User Id: C9948ABC	Circuit Court Program Access Security File Maintenance	Page 4 of 4
Grant access by Menu or Program - Y or blank, Deny access - N		
Utility Menu - OR - <input type="checkbox"/> County File <input type="checkbox"/> Attorney File Update <input type="checkbox"/> Code File <input type="checkbox"/> Code Listing <input type="checkbox"/> Case Type/Caseload Cds <input type="checkbox"/> PACC File <input type="checkbox"/> PACC Listing <input type="checkbox"/> ADR Location/Control <input type="checkbox"/> Financial Location File <input type="checkbox"/> Security <input type="checkbox"/> AFP Outq Maintenance <input type="checkbox"/> Court Room Maintenance <input type="checkbox"/> Case Reassignments		
Financial Menu - OR - <input type="checkbox"/> Open for Day <input type="checkbox"/> Receipts Journal <input type="checkbox"/> Transmittal <input type="checkbox"/> Adjustments <input type="checkbox"/> Close <input type="checkbox"/> Bond List <input type="checkbox"/> Court Order Pay List <input type="checkbox"/> Restitution List <input type="checkbox"/> Defendant Balances <input type="checkbox"/> History <input type="checkbox"/> Cash Code Update <input type="checkbox"/> Cash Code List <input type="checkbox"/> Victims Rights <input type="checkbox"/> Purge History		
F2=ADD F1=EXIT ROLL UP=PREVIOUS PAGE NEXT ___ ATTNY ___ CODE ___ TABLE ___ PACC ___ . _____		

Sample Security File Maintenance Screen page 4

UTILITY MENU: Enter **N** to secure specified user from all options on the utility menu. **Y** allows access to all options on this menu for the specified user.

-OR-

Enter **N** on each option appearing under utility menu that needs to be secured from the specified user. See Appendix D for the message displayed. **Y** or blank allows access to the corresponding program.

ATTORNEY FILE UPDATE When a value is entered in the attorney file update field, the same authority will be given to a user for the courtroom maintenance option.

FINANCIAL MENU: Enter **N** to secure specified user from all options on the financial menu. **Y** allows access to all options on this menu for the specified user.

-OR-

Enter **N** on each option appearing under the financial menu that needs to be secured from the specified user. See Appendix D for the message displayed. **Y** or blank allows access to the corresponding program.

NOTE: County File, Code File, Case Type/Caseload Location File, Security, Case Reassignments, Adjustments, and Purge History default to **N** when adding a security record.

Note: No users should ever be set to Y for Purge History.

FINANCIAL LOCATION FILE MAINTENANCE

Overview

The Financial Location File Maintenance screen is used to tailor the cash module of the CCS.

FINANCIAL LOCATION FILE MAINTENANCE			
CIRCUIT: 48	COUNTY: 99	LOCATION: 1	
LOCATION: <u>5</u> IS TESTING	_____		
ADDRESS: <u>123 SUNNY DRIVE</u>	_____		
CITY: <u>ANYWHERE</u>	ST: <u>MI</u>	ZIP: <u>47777</u>	_____
TELEPHONE: <u>888 3391547</u>	EXT: <u>3</u>		
LAST RECEIPT #: _____	<u>51</u>		
PRINT RECEIPTS: <u>Y</u>			
PRINT HEADINGS: <u>Y</u>			
RECEIPT COPIES: <u>1</u>			
COP DISTRIBUTION: <u>Y</u>			
SAVE TRANSACTION HISTORY: <u>Y</u>			
F3=MODIFY F4=DELETE F1=EXIT NEXT ____ ATTNVY _____ CODE ____ TABLE ____ PACC ____ . _____			

Sample Financial Location File Maintenance Screen

Accessing the Screen

The Project Administrator can access the Financial Location File Maintenance screen only for his/her circuit and only from the Circuit Utility Maintenance Menu. To access the Financial Location File Maintenance screen, type the numerical code for a county in your circuit in the COUNTY field, and the desired financial location number in the LOCATION field. Press **[F13]** and the Financial Location File Maintenance screen displays. To add or modify information, enter the relevant information in each field and press the appropriate function key.

Field Definitions

CIRCUIT	Circuit Court number displays as designated by user's sign-on ID.
COUNTY	County number entered in the COUNTY field on the Circuit Utility Maintenance Menu.

LOCATION	Location number entered in the Location field on the Circuit Utility Maintenance Menu.
LOCATION NAME	Name or title of the financial location. Example: County Clerk.
ADDRESS	Two fields are provided for the address of the financial location.
CITY/ST/ZIP	City, state and zip code + 4 of the financial location.
TELEPHONE	Area code, telephone number, and extension of the financial location.
LAST RECEIPT #	The last receipt number printed for cash receipts. When first implementing the cash module, set the receipt number by entering the last manual receipt number. For the first printed receipt to be 2534, enter 2533 in this field.
PRINT RECEIPTS	<p>Receipt transactions are generated and numbered using the LAST RECEIPT NUMBER for every cash receipt transaction. You have the option of printing receipts:</p> <p style="padding-left: 40px;">Y = Receipts will be printed on a designated printer immediately after each cash receipt, open for day, or cash code adjustment.</p> <p style="padding-left: 40px;">N = Receipts will not print.</p>
PRINT HEADINGS	<p>You have the option of printing the receipt headings on the receipt:</p> <p style="padding-left: 40px;">Y = plain computer paper is being used and the computer will print receipt headings.</p> <p style="padding-left: 40px;">N = court logo and headings have been pre-printed on specially ordered forms and the computer will not print receipt headings.</p>
RECEIPT COPIES	The number of times to print a receipt. Enter "1" if multi-part receipt paper is being used. If single-part paper is being used and you desire more than one copy of the receipt, enter the number of copies to be printed.
COP DISTRIBUTION	When making a payment on the Clerk Screen, the system can automatically distribute the payment towards court ordered accounts with a balance due. <u>To properly set up COP distribution, refer to REFERENCE NUMBER and ACCOUNT</u>

TYPE fields in the Cash Code Maintenance section of Chapter 6: Financial Management Menu.

- Y = System will automatically distribute the payment
The COP distribution method applies 50% of the payment towards crime victim rights assessment and restitution, and 50% towards the other categories in the priority designated by the number.
- N = User must manually distribute payment

SAVE TRANSACTION
HISTORY

During the Close for Day, detailed cash distribution transactions will be removed from the system unless flagged to save. If history is saved, you will be able to print transaction history by fund account number.

- Y = Save transaction history
N = Do not save history

AFP OUTQ MAINTENANCE

Overview

The AFP Outq Maintenance enables the user to print forms using the Advanced Functioning Print through a desired printer.

AFP Outq Selection		OSMXCSTDB		
Position to: _____				
2=Change		4>Delete 5=Display		
Opt	Outq	Description	Down	Across
█	ARLENA	ARLENA	0.200	0.200
-	CHRIS	FOR ASCII PRINTER	0.200	0.200
-	CIROUTQ	CIRCUIT OUTQ		
-	DAN	DAN'S AFP OUTQ	0.200	0.180
-	GLEN	GLEN'S OUTQ	0.200	0.180
-	J8X11	JURY 8X11 OUTQ	0.200	0.180
-	LARRYB	LARRYB OUTQ	0.200	0.200
F3=Exit		F6=Add		More..
				Roll/Page

Sample AFP Outq Maintenance Screen

Accessing the Screen

Access the AFP Outq Maintenance from the Circuit Utility Maintenance Menu. To enable AFP printing, a record for the desired printer must be entered into this file.

NOTE: There are other requirements to print using AFP. Call JIS with any questions.

To Add an AFP

To access the screen to add an AFP function key from the AFP Outq selection window, press **[F6]**.

AFP Outq Detail

Outq: _____

Description:

Offset Down:

Offset Across:

F3=Exit

Sample AFP Outq Detail Screen

Field Definitions

OUTQ	The name of the output queue.
DESCRIPTION	The description of the output queue. Example: Arlena's Printer, Printer in Clerk's Office.
OFFSET DOWN OFFSET ACROSS	The offset fields are used to adjust the position of the AFP form on the page. If a value is used in this field a value must also be used in the OFFSET ACROSS field. These fields are numeric and must be in the format 0.000. Call JIS for assistance.

COURTROOM MAINTENANCE

Overview

The Courtroom Maintenance screen is used to create, modify or delete information about the courtroom locations within a county. This information includes a courtroom code, name, address and telephone number for each location within the county. This file is used by other JIS applications.

```

          Court Room List by Room Number

1=Select  2=Change  4=Delete  5=Display
Opt Room# Room Name
-  CC01  CIRCUIT COURTROOM NUMBER 1
-  CC02  CIRCUIT COURTROOM NUMBER 2
-  CC03  CIRCUIT COURT RM #3
-  FC01  FAMILY COURTROOM NUMBER 1
-  TEST  CALHOUN COUNTY CIRCUIT COURT JUDGE MI
-  1     COURTROOM 1

                                          Bottom

F3=Exit          F6=Add          Roll/Page
  
```

Sample Court Room List Screen

ROOM# The four character code assigned to the courtroom.

ROOM NAME The name assigned to the courtroom.

To Add a Courtroom

To access the screen to add a courtroom press the **F6** function key from the Court Room List by Room Number screen. The Courtroom Details screen appears. Type the information as it pertains to the courtroom and press the **[ENTER]** key.

NOTE: User's Security Record must have attorney file update authority to have ADD COURTROOM Details.

```

CIRCUIT UTILITY MAINTENANCE MENU

COUNTY          99
LOCATION/CLERK    1

  Court Room List by Room Number

1=Select
Opt Room#
-  CC01
-  CC02
-  CC03
-  FC01
-  TEST
-  1

COU
ATT
COD
COD
CAS
CAS      F3=Ex
PAC
PAC
ADR LOCATION
ADR CLERK CONTR

ADD          Court Room Details

Room No.:  █
Room Name: _____
Address:   _____
          _____
          _____
          _____

Telephone:  _ _ _ _

          F3=Exit      Enter=Update

P)
XT)

```

Sample Court Room Add Screen

Field Definitions

- ROOM NO. The four character code assigned to the courtroom.
- ROOM NAME The name assigned to the courtroom.
- ADDRESS The address of the courtroom.
Note: There are two address lines. Do NOT enter city and state on second address line.
- TELEPHONE The telephone number of the contact person for the courtroom location. This number will print on the notice of hearing if a value is entered.

To Update a Courtroom

To access the screen to update courtroom information, enter the number **2** in the option field next to the appropriate courtroom code from the Court Room List by Room Number screen and press the **[ENTER]** key. The Court Room Details screen will be displayed, make the necessary changes and press the **[ENTER]** key.

To Delete a Courtroom

To access the screen to delete courtroom information, enter the number **4** in the option field next to the appropriate courtroom code from the Court Room List by Room Number screen and press the **[ENTER]** key. The Court Room Details screen will be displayed, press the **F23** function key and the record will be deleted.

To Display a Courtroom

To access the screen to display courtroom information, enter the number **5** in the option field next to the appropriate courtroom code from the Court Room List by Room Number screen and press the **[ENTER]** key. The Court Room Details screen will be displayed.

CASE REASSIGNMENT

Overview

The Case Reassignment screen is used to reassign part or all of one judge's caseload to another judge. This option should be used with caution and all users MUST be signed off from the JIS systems.

CIRCUIT	CASE REASSIGNMENT	4/01/2010
COUNTY 99 PLEASANT COUNTY		
JUDGE	FROM: <u>00000</u>	
	TO: <u>00000</u>	
- - - C A S E S E L E C T I O N - - - -		
***** PENDING: _ *****		***** CLOSED: _ *****
FILE DATE FROM: _____		ACTIVITY DATE FROM: _____
TO: _____		TO: _____
CASE TYPES: Criminal: _ Civil: _ Domestic: _ Appeals: _		
OR TYPES: _ _ _ _ _		
COMMENT: _____		
ALL CIRCUIT USERS MUST BE SIGNED OFF		
F1-Exit	Enter-Validate Selection	

Sample Case Reassignment Screen

Field Definitions

- | | |
|------------|---|
| JUDGE FROM | Enter the P number of the current judge's cases to be changed. |
| JUDGE TO | Enter the P number of the new judge the cases are being reassigned to. |
| FILE DATE | Enter the inclusive file dates of the cases to be reassigned. |
| CASE TYPES | Enter X next to the case types (Criminal, Civil, Domestic, or Appeals) to be reassigned. |
| *OR* TYPES | Enter specific case types to be reassigned. |

Press **[ENTER]** to validate selection. Press **F2** to Reassign Cases and generate a report listing cases that have been reassigned and calendar events that have been reassigned. Press **F9** to generate a report only. The Report Only option will give you a list of which cases will be reassigned when option **F2** is used.

Once the Reassignment has completed, a message will display, "INF: CASE REASSIGNMENT HAS COMPLETED PROCESSING". A docket entry is also written to the case register of actions with "FROM JUDGE - TO JUDGE, including any comments."