

# **JUDICIAL INFORMATION SYSTEMS**



## **Probate Court System Fall 2007 Release Training**

November 6 & 9, 2007 Michigan Hall of Justice, Lansing  
November 16, 2007, SCAO Region IV Office, Gaylord  
November 27, 2007, Iron Mountain



**Judicial Information Systems  
Probate Court System  
Fall 2007 Release Training**

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# Probate, Probate Civil, Adoptions

## Court Reporter/Recorder File

A court reporter/recorder field has been added to the schedule screen:

SCHEDULE ADD

CASE# 20070100 TYPE CA XREF # \_\_\_\_\_ TYPE \_\_\_\_ JUDGE 00123 DATE 1/01/2007  
 NAME WARD, ANN, SSNO 000000000 OPTIONAL DATE 2/26/1972  
 STATUS Q CLOSED \_\_\_\_\_ REOPEN \_\_\_\_\_ ATTNY 49539 WINTERS \_\_\_\_\_ PUBLIC P  
 MICRO \_\_\_\_\_ DISPO 2/15/2007 CODE GTD ORIG PR \_\_\_\_\_

=====

NUM	CODE	F/DATE	PTY	SEQ	H/DATE	TIME	ROOM	MICROFILM#	ATTNY	DISP	DATE	JUDGE
2					2007							

Form Number Requested \_\_\_\_\_ REP/REC \_\_\_\_\_

=====

NXT TRAN P SCH TYPE ADD CASE NBR 20070100 REC NBR \_\_\_\_\_  
 F2=Next Tran F3=Exit F4=Prompt F8=Juvenile F9=Name Lookup F11=View F12=Scan  
 F13=Notes F16=Inv/Date

The court reporter/recorder file is shared by probate, juvenile, district, and circuit courts on your AS400.

- Once a reporter/recorder is added to the file, they will be available to all JIS applications.
- The court reporter/recorder's name and certification number will appear on the ROA and case summaries.
- Each court reporter/recorder must be added to the file. The file will be blank when the Fall 2007 Release is loaded.

### Probate Civil Schedule Screen

SCHEDULE ADD  
 CIVIL# 20070111 TYPE CZ CASE# 20070103 TYPE DE JUDGE 123 DATE 1/01/2007  
 TITLE ESTATE OF DAVID WARD,, VS INSURANCE COMPANIES,,  
 MICROFILM # \_\_\_\_\_ STATUS 0 CLOSED \_\_\_\_\_ REOPEN \_\_\_\_\_ PUBLIC P  
 DISPO \_\_\_\_\_ CODE \_\_\_\_\_

---

NUM	CODE	DATE	PARTY	ATTNY	DISP	JUDGE	MICROFILM#
3	---	---	---	---	---	---	---

( REP/REC \_\_\_\_\_ )

---

NEXT ACTION:

DATE	TIME	SEQ	TYPE	COURTROOM	COMMENT
---	---	---	---	---	---

COURT ORDERED PAYMENTS \$ \_\_\_\_\_

NXT TRAN C SCH TYPE ADD CASE NBR 20070111 REC NBR \_\_\_\_\_  
 F2=Nxt Tran F3=Exit F4=Prompt F6=System F8=Juvenile F9=Name Lookup Help  
 F13=Notes F14=Docket Inq F16=Inv/Date

### Adoption Event Screen

Event ADD Case# 20070112 \_\_\_\_\_ Type AM Filed 0101 2007  
 Jurist 123 GOODRULING Attny \_\_\_\_\_ Worker \_\_\_\_\_  
 Name WARD, LUCY, DOB 1231 2006 Gen F Race WA

---

Num	Date	Typ	Comments	Jurist	Attny	Rep/Rec
<u>1</u>	<u>2007</u>	---	---	---	---	---

Results \_\_\_\_\_ Legal Status \_\_\_\_\_

Custodial Party \_\_\_\_\_ Date Changed \_\_\_\_\_

Placement \_\_\_\_\_

Next Hearing \_\_\_\_\_ Time \_\_\_\_\_ Type \_\_\_\_\_ Jurist \_\_\_\_\_ Courtroom \_\_\_\_\_

Party Type \_\_\_\_\_ Attny \_\_\_\_\_ Party Type \_\_\_\_\_ Attny \_\_\_\_\_

\_ MORE COMMENTS

Form nbr requested \_\_\_\_\_ Sign Jurist \_\_\_\_\_

Nxt Tran ADE Type ADD Case# 20070112 \_\_\_\_\_ Petn# 00000000 Event# \_\_\_\_\_ Pty \_\_\_\_\_  
 F1=Help F2=Nxt Tran F3=Exit F4=Prompt F6=System  
 F8=Probate F9=Name Inq F10=Attny Inq F13=Notes F14=Dkt.Inq

## Court Reporter/Recorder File

Adding a court reporter/recorder:

ADD Court Reporter Details

Cert No. : 9876 Certification: CER

Last Name : ANDERSON

First & MI: ANNIE Name Sfx:    

ROA Text : \_\_\_\_\_

Address: COURTHOUSE

100 MAIN STREET

LANSING MI 48809

Company: COUNTY PROBATE & JUVENILE COURT

Telephone: 888 339 1547 Ext.    

FAX: 517 373 7451

E-Mail: andersona@countycourt.org

Exp. Date: \_\_\_\_\_

Last Chgd: \_\_\_\_\_ Chg by: \_\_\_\_\_

HELP F3=Exit Enter=Update

- Cert No.                    The SCAO certification number for this court reporter
- Certification:            The type of certification (CEO, CER, CSR, etc.)
- Last Name:                The last name of the reporter
- First & MI:                The first name and middle initial of the reporter
- Name Sfx:                 The name suffix, such as Jr., Sr., III, etc.
- ROA Text:                 This field is not available when adding a reporter.  
It will be populated by the system based on the information entered on this screen. It can be modified using "change" after the reporter has been added.
- Address:                  The mailing address of the reporter
- Company:                 The company or court of the reporter
- Telephone:                The telephone number of the reporter

Fax: The fax number of the reporter

Email: The email address of the reporter

Exp. Date: The date the reporter's certification will expire

Last Chgd: *(Display only)* The date the information was last changed

Chg by: *(Display only)* The user that last changed the information

### Case Status on F9 Name Index

The Case Status has been added to the Probate F9 Name Index:

Court ID : P 19 BETTY		Probate/Civil Name Inquiry Lookup		NAME	
Case#	Typ Dsc Name	Sts	Num File Date	Microfilm	Sys Pub
- 20070100	CA CA WARD, ANN,	O	1/01/2007		P PUB
- 20070101	CY CY WARD, BOB,	O	1/01/2007		P PUB
- 20070102	DD DD WARD, CARL,	C	1/01/2007		P PUB
- 20070103	DE DE WARD, DAVID,	A	1/01/2007		P PUB
- 20070104	GA GA WARD, EDIE,	O	1/01/2007		P SUP
- 20070105	GM GM WARD, FRED,	O	1/01/2007		P PUB
- 20070106	GL GL WARD, GEORGE,	O	1/01/2007		P PUB
- 20070107	LG LG WARD, HARVEY,	O	1/01/2007		P PUB
More...					

Nxt Tran P Type     Case# 97004796 Rec nbr      
 F1=Help F2=Nxt Tran F3=Exit F4=Prompt F6=System  
 F9=Start over F14=Dkt. Inq F16=Inv. cal.

Case Status Options:

- O=Open
- C=Closed
- A=Administratively Closed

## New Probate Reports

New Probate Reports have been added to the Probate Reports Menu:

```
Court ID : P 19 BETTY   Probate Report Selection Menu

 1. Report Generator
 2. Docket Report Generator
 3. Case Clean up (Close Cases)
 5. Case History Summary
 6. Caseload Report
 7. Case Review List
 8. Civil Case Activity Summary
 9. Civil Case List
10. Civil Case Review List
11. Closing Cert/Final Receipts
12. Courtroom Worksheets and
    Daily Docket/Information Desk
13. Daily Transaction Journal
14. Delinquent Fiduciary Reports

15. Disposition Status Report
16. Guardian Review List
17. Lack of Progress Report
18. Mailers/Notice Generation
19. Master Case List
20. Minor Guardian Review List
21. Minors of Age Report
22. New Case Cards
23. New Fiduciary Report
24. Pre-Notices
25. Summary Counts of Cases Filed
26. Summary of Open Cases
27. Suspended Fiduciary List
28. Transaction Report - Civil
29. Transaction Report - Probate

Make your selection: __

Nxt Tran P RPT Type PRO Case# 000000000 Rec nbr ____
F1=Help F2=Nxt Tran F3=Exit F4=Prompt F6=System
F8=Civil F9=Name Inq. F14=Dkt.Inq F16=Inv.Cal
```

Select report #19, Master Case List, and press Enter:

## Probate Master Case List

```

Court ID : P 19 BETTY      MASTER CASE LIST

Enter end date:           1029 2007

Enter Y for fiduciary report:  _  OR leave blank for Master Case List

Enter Y to print all cases:  Y  OR select from the following

Guardianship Cases Only:    _
Conservatorship Cases Only: _
Decedent Estates Only:     _
Miscellaneous Cases Only:   _
Mentally Ill Cases Only:   _
Family Division Cases Only: _

Nxt Tran P RPT Type PRO Case# 00000000      Rec nbr ___
F1=Help F2=Nxt Tran F3=Exit F4=Prompt        F6=System
F8=Civil F9=Name Inq. F14=Dkt.Inq F16=Inv.Cal
    
```

You may enter an End Date or the system will use the current date as the default.

To run the Probate Master Case List, leave the first blank empty, and enter a “Y” to print all cases or select the cases you would like to appear on the report.

A sample of the Master Case List is on the following page:

CASE #	TYPE	CASE NAME	OPEN/REOPEN	STATUS	DISP DATE	DISP TYPE		
PTY #		PARTY NAME	QUAL DATE	PTY ACT	PTY ACT DTE	CRT ACT	CRT ACT DTE	
05025842	GM	MASTERS, MARIE,	1/28/2005		DISPOSED		3/01/2005	GTD
02		OLIVER, OLIVIA,	3/01/2005	AGM	3/20/2007	NOT	5/04/2006	
05025843	GM	POWERS, POLLY,	1/28/2005		DISPOSED		3/01/2005	GTD
02		QUINN, QUINCY,	3/01/2005	AGM	3/20/2007	NOT	5/04/2006	
05025847	GL	HANSON, HARRY,	2/01/2005		DISPOSED		3/08/2005	GTD
03		INGELS, IRVING,	6/09/2006	AGW	2/06/2007		0/00/0000	
05025848	MI	BALDWIN, BAILEY,	2/01/2005		OPEN		3/08/2005	

## Probate Fiduciary Report

```

Court ID : P 19 BETTY      MASTER CASE LIST

Enter end date:           1029 2007

Enter Y for fiduciary report:  Y OR leave blank for Master Case List

Enter Y to print all cases:   Y OR select from the following

Guardianship Cases Only:     -
Conservatorship Cases Only:  -
Decedent Estates Only:       -
Miscellaneous Cases Only:    -
Mentally Ill Cases Only:     -
Family Division Cases Only:  -

Nxt Tran P RPT Type PRO Case# 00000000      Rec nbr ___
F1=Help F2=Nxt Tran F3=Exit F4=Prompt          F6=System
F8=Civil   F9=Name Inq.                       F14=Dkt.Inq F16=Inv.Cal
    
```

You may enter an End Date or the system will use the current date as the default.

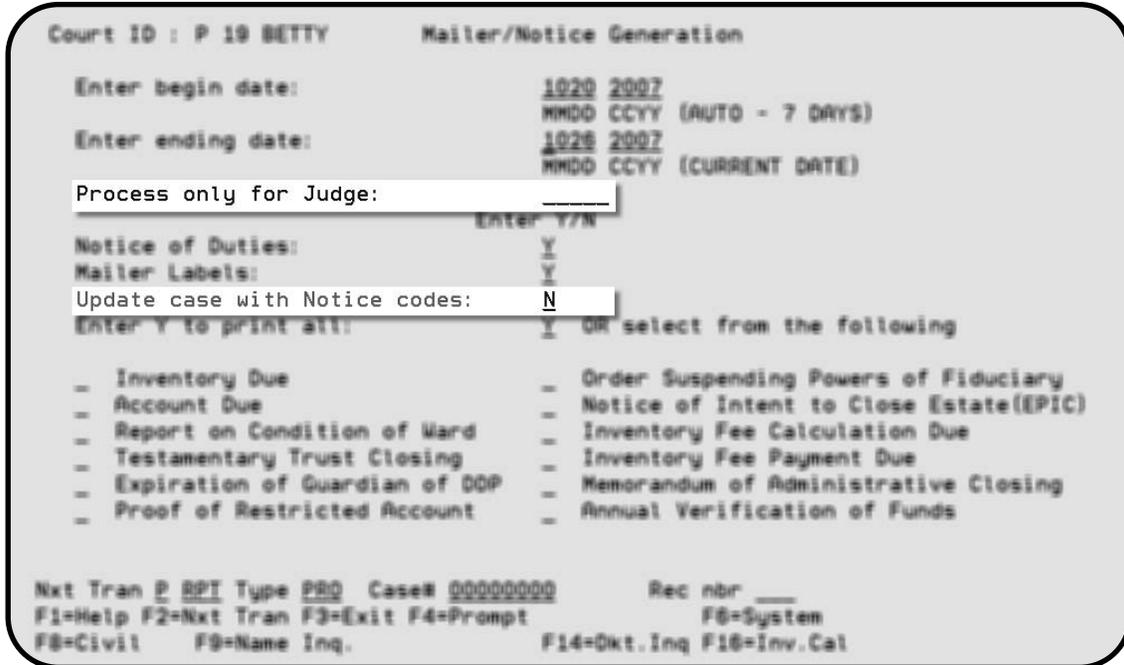
To run the Probate Fiduciary Report, enter “Y” in the first blank, and enter “Y” to print all cases or select the cases you would like to appear on the report.

A sample of the Probate Fiduciary Report is on the following page:

FIDUCIARY NAME	CASE #	TYPE	CASE NAME	QUAL	DTE	PTY	ACT	PTY	ACTDTE	CRT	ACT	CRT	ACTDTE
YUTS, YANCY,	06026138	GA	KELLOGG, TONY,		3/21/2006		AGW		6/22/2007				0/00/0000
YUTS, YANCY,	06026139	CA	KELLOGG, TONY,		3/21/2006		ACC		7/17/2007		SHH		8/16/2007
ZANDER, ZAVIER,	98024143	GA	ADAMS, ALICE,		10/21/1998		AGW		1/19/2007		NOT		12/19/2006
ZELLINGER, ADAM,	05025998	DE	BRECK, BERTHA,		8/24/2005		NCD		8/16/2007		NOT		11/28/2005
ZELLO, ZEB,	94023115	LG	ZELLO, ZACHARY,		9/02/1994		AGM		11/07/2006		NOT		11/01/2006
ZIGZAG, ANNABELLE,	05025922	DE	ZIGZAG, ZOEY,		6/21/2005		FAC		9/17/2007		NOT		8/03/2007
ZUMBURS, JEANNE, V,	20070690	DE	ZUMBURS, EDGARS, JANIS,		7/18/2007				0/00/0000				0/00/0000
TOTAL ACTIVE CASES: 0001221													

## Probate Mailer/Notice Generation

Two new options will appear on the mailer/notice generation screen:



**Process only for Judge:**

You may now process mailers/notices by Jurist. Enter the bar number of the Jurist and select the type of mailers/notices you would like to generate. Leave this field blank to run mailers/notices for all Jurists.

**Update case with Notice codes:**

The system can automatically update the PTY screen and the SCH screen with the appropriate Notice code (NOT, NOD, NCE, NOX). The default will be “N” - change to “Y” if you would like to utilize this feature. An exception report will generate and will state “All cases updated,” or will list cases that were not updated with notice codes because either (1) a case was in use when the notices were generated, or (2) the user does not have the security to update probate cases.

## **Other Changes to Probate Mailer/Notice Generation**

**Proof of**

**Restricted Account:** Pursuant to ADM File No. 2006-28, the PAR (PC669) will now be due within 28 days of qualification date.

**Mailer Processing:**

Historically, mailers have been generated based on the information in the party screen. Mailers have now been reprogrammed to search schedule events for party activities and court activities. This should improve accuracy of the generated mailers. There will be no change to the way you are currently entering the information.

## Deficiencies in Guardian/Conservator Administration

This report replaces the Delinquent Fiduciary/Non-Compliance Report:

```

Court ID : P 19 BETTY      Probate Report Selection Menu

 1. Report Generator
 2. Docket Report Generator
 3. Case Clean up (Close Cases)
 5. Case History Summary
 6. Caseload Report
 7. Case Review List
 8. Civil Case Activity Summary
 9. Civil Case List
10. Civil Case Review List
11. Closing Cert/Final Receipts
12. Courtroom Worksheets and
    Daily Docket/Information Desk
13. Daily Transaction Journal
14. Delinquent Fiduciary Reports
15. Disposition Status Report
16. Guardian Review List
17. Lack of Progress Report
18. Mailers/Notice Generation
19. Master Case List
20. Minor Guardian Review List
21. Minors of Age Report
22. New Case Cards
23. New Fiduciary Report
24. Pre-Notices
25. Summary Counts of Cases Filed
26. Summary of Open Cases
27. Suspended Fiduciary List
28. Transaction Report - Civil
29. Transaction Report - Probate

Make your selection: _

Nxt Tran P RPT Type PRO Case# 00000000      Rec nbr ____
F1=Help F2=Nxt Tran F3=Exit F4=Prompt      F6=System
F8=Civil F9=Name Inq. F14=Dkt.Inq F16=Inv.Cal
    
```

Select Probate Report #14, Delinquent Fiduciary Reports:

```

Court ID : P 19 BETTY      Delinquent Fiduciary Reports

Enter Report Date:          1031 2007
                             MMDD CCYY

Enter Judge's bar number or  _____ leave blank for all Judge's

Delinquent Fiduciary Report (Y/N): Y

Create Non-Compliance Reports Y

Nxt Tran P RPT Type PRO Case# 06026139      Rec nbr ____
F1=Help F2=Nxt Tran F3=Exit F4=Prompt      F6=System
F8=Civil F9=Name Inq. F14=Dkt.Inq F16=Inv.Cal
    
```

---

## **Deficiencies in Guardian/Conservator Administration**

The final submission for the Delinquent Fiduciary Report (Non-Compliance Report) will be in January 2008.

The first submission for the Deficiencies in Guardianship/ Conservatorship Administration will be in July 2008. Guardians and conservators that are more than 182 days deficient will appear on this report.

The following is a sample of the Deficiencies in Guardianship/Conservatorship Administration Report:

P19  
DELINQFD

DEFICIENCIES IN GDN/CON ADMINISTRATION  
COUNTY PROBATE COURT  
COURTHOUSE, 100 MAIN STREET  
LANSING MI 48809

RUN DATE: 11/05/2007 PAGE : 1  
RPT DATE: 10/31/2007  
CONTACT : BETTY WIGGINS  
PHONE # : (888) 339/1547

A: SUMMARY REPORT OF CASES

LINE	CASE TYPE	CA	CY	DD	GA	GL	GM	LG
1	ACTIVE CASES	102	83	188	109	5	91	25
2	DEFICIENT OVER 182 DAYS	100	105	168	54	1	42	14

P19  
DELINQFD

DEFICIENCIES IN GDN/CON ADMINISTRATION  
COUNTY PROBATE COURT  
COURTHOUSE, 100 MAIN STREET  
LANSING MI 48809

RUN DATE: 11/05/2007 PAGE : 1  
RPT DATE: 10/31/2007  
CONTACT : BETTY WIGGINS  
PHONE # : (888) 339/1547

B: DETAIL REPORT OF DEFICIENCIES

LINE	Case No.	Name of Fiduciary	Date of Deficiency	Deficiency	Crt Action	Crt Act Date	Days Deficient
1	2007000501-DD	TESTING DD GUARDIANSHIP,,	09/27/2006	INV			399
2	2007000101-CA	CONSERVATOR OF ADULT TEST,,	09/27/1999	ACC			2956

# Juvenile/Family Division

## Expunge/Purge/Destroy Screen Changes

Pursuant to the SCAO memorandum of August 30, 2007, regarding “Destruction of Paper Juvenile Files,” and the General Records Retention and Disposal Schedule #16 (Items 16.057A-C), several changes have been made to the Juvenile system.

**Case screen:**

```

Case      INQ Case# 07000005 __ Status 0                Type DL Filed 1001 2007
Jurist   __123      Attorney 49539 Type A Worker 98765 Public S Sprvsn Level I
Name GOODRULING      Name WINTERS      Name BROWN      SSN 000000000
Name ROBERTS,RICHARD, DOB 501 1993 Gender M Race WA
Address 123 MAIN STREET
City LANSING      ST MI ZIP 48809      Phone. 888 339-1547 SID
School-home LAN Attending LAN Grade 09      DLN MI
Insurance Policy Effective
Group# Service Code Microfilm Number
Medicaid I.D. Effective FIA Case#
STATUS INFORMATION:
Case Opened.      1001 2007
Case Closed.      ____ ____
Case Reopen.      ____ ____
Custody.....
Legal..... CTS      1015 2007 COURT SUPERVISION
Placement...
Placmnt Type
Program.....

Nxt Tran CSE Type INQ Case# 07000005 __ Petn# 00000000 Event# __ Pty __
F1=Help F2=Nxt Tran F3=Exit F4=Prompt F5=File Sum F6=System
F9=Name Inq F10=Attny Inq F13=Notes F14=Dkt.Inq F16=Inv.Cal
    
```

The “Service Type” has been changed to “Supervision Level” on this screen.

The “Purge Date” has been eliminated from this screen.

**Petition Screen:**

```

Petition INQ Case# 07000005 Petition# 00000001 Type DL Filed 1001 2007
Jurist 123 Attorney 49539 Type A Worker 98765 Public S
Name GOODRULING Name WINTERS Name BROWN SSN 000000000
Name ROBERTS/RICHARD/ DOB 501 1993 Gen M Race WA
Petition Opened 1001 2007 Jurist 123 Adjud 1015 2007 Jurist 123 Code CCP
Petn Authorized _____ Jurist 123 Paper Plate _____
Offense Date 915 2007 Loc EAS Petitrn MSP CTN 987654321098 Cmp _____
Reopen Date _____ Service Type I Destroy Date 529 2010
    
```

Num	ORIG/PACC Comment	ALCSI	AMND/PACC Comment	ALCSI	Dis	Evt Attributes
<u>1</u>	<u>750 3821B1</u>					<u>CCP PRH</u>
	<u>MALIC DEST TREE 200-1000</u>					<b>ABS CHR</b>

More...

```

Nxt Tran PET Type INQ Case# 07000005 Petn# 00000001 Event# _____ Pty _____
F1=Help F2=Nxt Tran F3=Exit F4=Prompt F5=File Sum F6=System F7=View History
F8=Probate F9=Name Inq F14=Dkt.Inq F16=Inv.Cal
    
```

The "Service Type" field has been moved, and is no longer a display only field. It is now a data entry field.

A new field of "Destroy Date" has been added to this screen.

## **Expunge/Purge/Destroy** Adding or Modifying Cases/Petitions

### **Public Status:**

The only valid entries for the “Public” field on both the Case screen and the Petition screen are “Public” and “Suppressed.” “Expunged” has been eliminated as a valid selection.

The “Public” field may be left blank on the Case screen, but a valid entry is required on the Petition screen.

### **Supervision Level:**

This field exists on the Case screen for information only. The field name has been changed to better reflect the field’s purpose.

### **Service Type:**

This field only exists on the Petition screen now. It is controlled by the user. Valid entries include “Formal,” “Informal,” “Court Designated,” and “Prosecutor Designated.” “Permanent” is no longer valid.

### **Destroy Date:**

This field resides on the Petition screen now. Each petition will have its own Destroy Date. The Destroy Date will be calculated using a combination of the petition authorization date, the petition adjudication code, and the juvenile’s date of birth. The following table describes how the petition Destroy Date will be calculated:

**Expunge/Purge/Destroy**  
**Adding or Modifying Cases/Petitions**

**Destroy Date (Continued):**

<b>Petition Authorized</b>	<b>Petition Adjudication Code</b>	<b>Calculation of Destruction Date</b>
Authorized (not blank)	DVT	DOB + 17 years + 28 days
Authorized (not blank)	CCP	DOB + 17 years + 28 days
Authorized (not blank)	JUR	Calculation will be based on charge dispositions.
Authorized (not blank)	BT	Calculation will be based on charge dispositions.
Authorized (not blank)	All other Codes (including "blank")	DOB + 30 years
Not Authorized (blank)	None (blank)	None (blank)
Not Authorized (blank)	Any petition adjudication code (not blank)	DOB + 17 years + 28 days

## Destruction of Paper File Adding the DOR Event

Event	INQ	Case#	00013831	Petition#	00138311	Type	DL	Filed	0531 2000
Jurist	25876	ROBERTSON	Attny		Worker				
Name	MATTHEWS/MARK/		DOB	207 1984	Gen	M	Race		
Petition Opened	531 2000	Jurist	25876	Adjud	609 2000	Jurist	25876	Code	CHV
Offense: Date	414 2000	Loc	DEW	Petitnr	DEW	SSN	000000000	CTN	190080005801
			ABS CHR						
Num Date	Cg	Typ	Comments	Jurist	Attny	Rep/Rec			
10 1001 2007		DOR	DESTRUCTION OF PAPER FILE	25876					
Results				Pgm		Status			
Placement		Special Rate		Placement Type		Custody			
Next Hearing		Time		Type		Jurist		Chg	
Party Type		Attny		Party Type		Attny		PPI	
Bond: Type		Amt		Act Typ		Date			
		Posted By		Receipt					
Curfew of		Sun. thru Thurs.		and		Fri. and Sat.			
		Form nbr requested		Sign Jurist					
Nxt Tran	EVT	Type	INQ	Case#	00013831	Petn#	00138311	Event#	10
F1=Help F2=Nxt Tran F3=Exit F4=Prompt F5=File Sum F6=System F8=Probate F9=Name Inq F10=Atty Inq F11=View F12=Scan F13=Notes F14=Dkt.Inq F16=Inv.Cal									

When the paper file is destroyed, enter the event of DOR. This will cause the event of "DESTRUCTION OF PAPER FILE" to be added to the case summary. This will also cause the notation of "File Dest Evt" and the event date to be added to the file summary.

## **Expunge/Purge/Destroy** Conversion of Existing Files

When the Fall 2007 Release is applied, the following conversion will be made to existing juvenile files:

### **Public Status**

**Case screen:** The case level Public status will remain unchanged. All cases with a Public status of Expunged will retain their value once the release is applied. However, if a case contained a purge date later than May 1, 2003, the Public status must be changed to Public or Suppressed before any other modifications may be made to the Case screen. Cases with a purge date earlier than May 1, 2003, may continue to retain the Expunged status.

**Petition screen:** The petition level Public status will remain unchanged. All petitions with a Public status of Expunged will retain their value once the release is applied. However, if a petition contains a destroy date later than May 1, 2003, the Public status must be changed to Public or Suppressed before any other modifications may be made to the Petition screen. Petitions with a destroy date earlier than May 1, 2003, may continue to retain the Expunged status.

Once the release is applied, the Public field must contain a valid value (either P or S) for each petition. This field may no longer be left blank.

### **Supervision Level**

**Case screen:** The case level Supervision Level will be loaded with the current case level Service Type once the release is applied, with one exception. The service type of Permanent is no longer valid. All cases with the Service Type of Permanent will be loaded with a Supervision Level of Formal.

### **Service Type**

**Petition screen:** The petition level Service Type will be loaded with the current case level Service Type once the release is applied, with one exception. The service type of Permanent is no longer

---

valid. All petitions on cases with the Service Type of Permanent will be loaded with a Service Type of Formal.

### **Destroy Date**

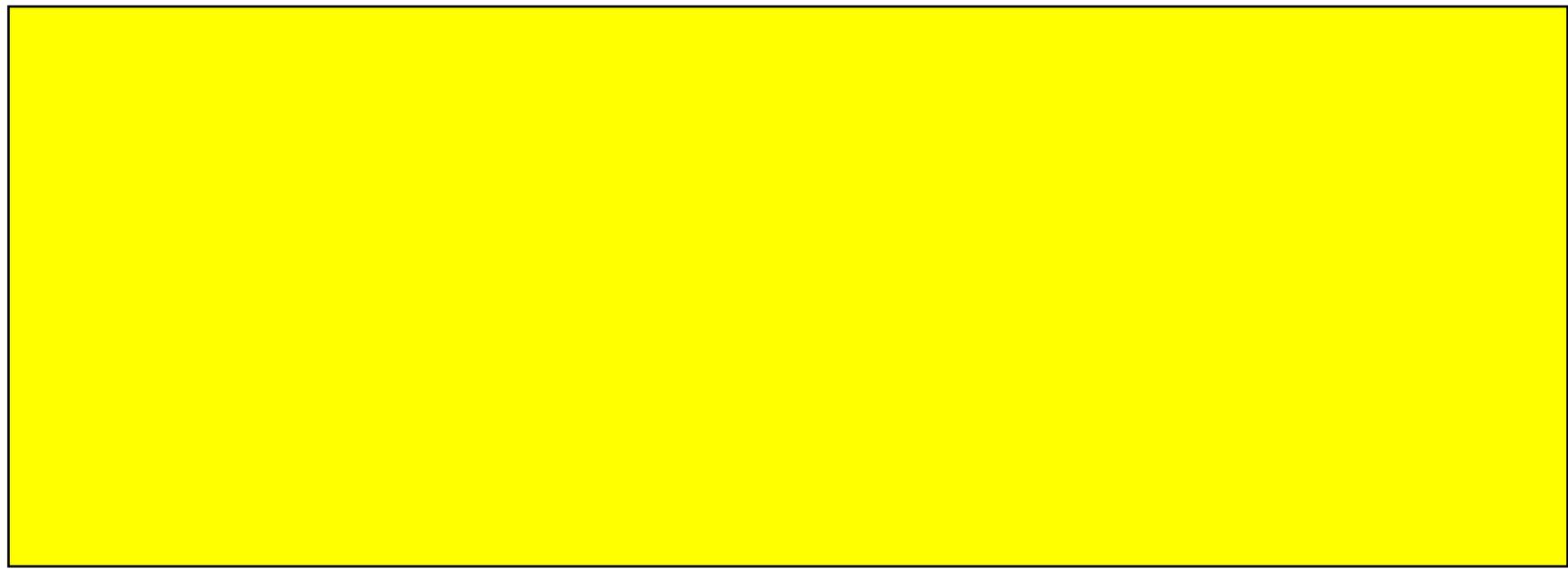
Case screen: The field Purge Date will be removed from the case screen once the release is applied.

Petition screen: The new field, Destroy Date, will be added to the petition screen and will be loaded with the appropriate date, as calculated (see chart on prior page). If necessary, the system will recalculate the Destroy Date if the petition Authorization Date field, petition Adjudication Code field, or the juvenile's date of birth field is modified.



REPORTING PERIOD 1/01/2005 - 12/31/2005

CASE	SFX	NAME	PETITION	BIRTH DATE	DESTROY DATE	SVC	PUB
5006598		ANTHONY ANDREWS	5065981	10/03/1988	10/31/2005		S
5006606		RODNEY ROGERS	5066061	3/31/1988	4/28/2005	I	S
5006606		RODNEY ROGERS	5066062	3/31/1988	4/28/2005	I	S
5006626		PAUL PETERS	5066261	11/07/1988	12/05/2005	I	S
5006629		HANNAH HENDERSON	5066291	4/18/1988	5/16/2005	I	S
5006637		WILLIAM WALTERS	5066371	10/31/1988	11/28/2005	I	S
5006637		WILLIAM WALTERS	5066372	10/31/1988	11/28/2005	I	S
5006639		KRISTIN KEHR	5066391	10/07/1988	11/04/2005	I	S
5006639		KRISTIN KEHR	5066392	10/07/1988	11/04/2005	I	S
5006647		CATHY CARPENTER	5066471	2/26/1988	3/25/2005	I	S
5006651		QUINCY QUINN	5066511	7/07/1988	8/04/2005	I	S



### F5 File Summary

The F5 File Summary option has been added to the Case, Petition, and SUM/CSE screens. The file summary has been enhanced to include additional information about each petition:

```

Case Sum ___ Case# 07000006 ___ Status 0 PUBLIC Type DL Filed 0901 2007
Jurist 123 GOODRULING Attny 49539 WINTERS Worker 98765 BROWN
Name FULLER,FRED, DOB 729 1992 Gender M Race WA
SID _____ Sprvsn Level F
Case Opened 901 2007 Case Closed _____ Case Reopened _____

Petition # 00000001 Public Date Opened 0901 2007 CTN 87654321098
Adjud Date 1001 2007 Jurist JOHN GOODRULING Code ADMT ALLEG
Service Type Destroy Date 0729 2022 File Dest Evt
01 750.3802A . AAL PRH
Comment MALIC DEST BUILD 20000 +
02 750.479-B . AAL PRH
Comment RESIST & OBSTRUC OFFICER
03 750.5353A . AAL PRH
Comment RECEIVING AND CONCEALING
04 750.3564A . AAL PRH
Comment LARCENY FROM $200 - $1,00

NBR Date CG TYPE COMMENT JURIST ATTORNEY
001 0901 2007 PET PETITION GOODRULING,JOH

F3 = EXIT F5 = Print & EXIT More...
    
```

Press F5 once again to print the file summary and exit this screen, or press F3 to exit the screen without printing.

## Changes to Existing Juvenile Reports Docket List & Master Case List

R E P O R T   S E L E C T I O N  
| J U V E N I L E |

<ul style="list-style-type: none"> <li>1. Report Generator</li> <li>2. Intake Report Generator</li> <li>3. Docket Report Generator</li>   <li>4. Abstractable Offenses</li> <li>5. Abstracts To SOS</li> <li>6. Alphabetic Intake Case List</li> <li>7. Audit Report</li> <li>8. Case Summary Report</li> <li>9. Caseload Report</li> <li>10. Charge Disposition Report</li> <li>11. Child Care Fund Summary</li> <li>12. Children Reaching 19 in ACT150</li> <li>13. Crime Victim Rights Report</li> <li>14. Docket List</li> <li>15. Docket Work Sheets</li> <li>16. Drug Audit List</li> <li>17. Hearing Count By Jurist</li> </ul>	<ul style="list-style-type: none"> <li>18. Intake Age Report</li> <li>19. Intake Problem Summary Report</li> <li>20. Master Case List</li> <li>21. Offense Case Summary</li> <li>22. Offense Summary</li> <li>23. Over Age Report</li> <li>24. Permanency Indicators Report</li> <li>25. Petition Age Report</li> <li>26. Petition Count</li> <li>27. Petition Destroy Date Report</li> <li>28. Petition List</li> <li>29. Placement Report</li> <li>30. Record of Petition Report</li> <li>31. Traffic Case List</li> <li>32. Traffic Violation List</li> <li>33. Victim List</li> </ul>
--	---

Make your Selection: \_\_

F1=HELP
F3=EXIT
F6=SYSTEM COMMANDS

The juvenile Docket List (#14) will now list the parents' attorneys.

The Master Case List (#20) will include closed cases on the individual worker reports if the report is run with that selection.

### Court Reporter/Recorder File

The court reporter/recorder field has been added to the juvenile event screen:

Event ADD Case# 07000005 Petition# 00000002 Type DL Filed 1001 2007  
 Jurist 123 GOODRULING Attny 49539 WINTERS Worker 98765 BROWN  
 Name ROBERTS/RICHARD/ DOB 501 1993 Gen M Race WA  
 Petition Opened 1015 2007 Jurist \_\_\_\_\_ Adjud \_\_\_\_\_ Jurist \_\_\_\_\_ Code \_\_\_\_\_  
 Offense: Date \_\_\_\_\_ Loc \_\_\_\_\_ Petitrn MSP SSN 000000000 CTN \_\_\_\_\_

Num	Date	Cg	Typ	Comments	Jurist	Attny	Rep/Rec
<u>5</u>	<u>2007</u>	_____	_____	_____	_____	_____	_____
Results _____				Pgm _____	Status _____		

Placement \_\_\_\_\_ Special Rate \_\_\_\_\_ Placement Type \_\_\_\_\_ Custody \_\_\_\_\_  
 Next Hearing \_\_\_\_\_ Time \_\_\_\_\_ Type \_\_\_\_\_ Jurist \_\_\_\_\_ Chg \_\_\_\_\_ Courtroom \_\_\_\_\_  
 Party Type \_\_\_\_\_ Attny \_\_\_\_\_ Party Type \_\_\_\_\_ Attny \_\_\_\_\_ PPI \_\_\_\_\_  
 Bond: Type \_\_\_\_\_ Amt \_\_\_\_\_ Act Typ \_\_\_\_\_ Date \_\_\_\_\_  
 Posted By \_\_\_\_\_ Receipt \_\_\_\_\_  
 Curfew of \_\_\_\_\_ Sun. thru Thurs. and \_\_\_\_\_ Fri. and Sat.

Form nbr requested \_\_\_\_\_ Sign Jurist \_\_\_\_\_

Nxt Tran EVT Type ADD Case# 07000005 Petn# 00000002 Event# \_\_\_\_\_ Pty \_\_\_\_\_  
 F1=Help F2=Nxt Tran F3=Exit F4=Prompt F5=File Sum F6=System F8=Probate  
 F9=Name Inq F10=Atty Inq F11=View F12=Scan F13=Notes F14=Dkt.Inq F16=Inv.Cal

The court reporter/recorder file is shared by probate, juvenile, district, and circuit courts on your AS400.

- Once a reporter/recorder is added to the file, they will be available to all JIS applications.
- The court reporter/recorder's name and certification number will appear on the ROA and summaries.
- Each court reporter/recorder must be added to the file. The file will be blank when the Fall 2007 Release is loaded.

## Court Reporter/Recorder File

Adding a court reporter/recorder:

ADD Court Reporter Details

Cert No. : 9876 Certification: CER

Last Name : ANDERSON

First & MI: ANNIE Name Sfx:    

ROA Text : \_\_\_\_\_

Address: COURTHOUSE

100 MAIN STREET

LANSING MI 48809

Company: COUNTY PROBATE & JUVENILE COURT

Telephone: 888 339 1547 Ext.    

FAX: 517 373 7451

E-Mail: andersona@countycourt.org

Exp. Date: \_\_\_\_\_

Last Chgd: \_\_\_\_\_ Chg by: \_\_\_\_\_

HELP F3=Exit Enter=Update

- Cert No.                    The SCAO certification number for this court reporter
- Certification:            The type of certification (CEO, CER, CSR, etc.)
- Last Name:                The last name of the reporter
- First & MI:                The first name and middle initial of the reporter
- Name Sfx:                 The name suffix, such as Jr., Sr., III, etc.
- ROA Text:                 This field is not available when adding a reporter.  
It will be populated by the system based on the information entered on this screen. It can be modified using “change” after the reporter has been added.
- Address:                  The mailing address of the reporter
- Company:                  The company or court of the reporter
- Telephone:                The telephone number of the reporter

Fax: The fax number of the reporter

Email: The email address of the reporter

Exp. Date: The date the reporter's certification will expire

Last Chgd: *(Display only)* The date the information was last changed

Chg by: *(Display only)* The user that last changed the information

## Event Enhancement

### ATT - Appearance of Attorney/GAL/L-GAL

Sfx		Petition	Case#	07000007	Attorney #	54929
<input checked="" type="checkbox"/>	1	00000001	NELSON/NELLIE/			
<input checked="" type="checkbox"/>	2	00000001	NELSON/NED/			
<input checked="" type="checkbox"/>	3	00000001	NELSON/NORA/			
<input checked="" type="checkbox"/>	4	00000001	NELSON/NEAL/			

Num	Date	Cg	Typ	Comments	Jurist	Attny	Rep/Rec
	1101	2007	ATT				

Results \_\_\_\_\_ Pgm \_\_\_\_\_ Status \_\_\_\_\_

Placement \_\_\_\_\_ Special Rate \_\_\_\_\_ Placement Type \_\_\_\_\_ Custody \_\_\_\_\_

Next Hearing \_\_\_\_\_ Time \_\_\_\_\_ Type \_\_\_\_\_ Jurist \_\_\_\_\_ Chg \_\_\_\_\_ Courtroom \_\_\_\_\_

Party Type F01 Attny 55295 Party Type M01 Attny 55295 PPI \_\_\_\_\_

Bond: Type \_\_\_\_\_ Amt \_\_\_\_\_ Act Typ \_\_\_\_\_ Date \_\_\_\_\_  
 Posted By \_\_\_\_\_ Receipt \_\_\_\_\_  
 Curfew of \_\_\_\_\_ Sun. thru Thurs. and \_\_\_\_\_ Fri. and Sat.  
 Do you want to include financial orders? \_\_\_\_\_  
 Form nbr requested \_\_\_\_\_ Sign Jurist \_\_\_\_\_

Nxt Tran EVT Type ADD Case# 07000007 Petn# 00000000 Event# \_\_\_\_\_ Pty \_\_\_\_\_

F1=Help F2=Nxt Tran F3=Exit F4=Prompt F6=System F8=Probate  
 F9=Name Inq F10=Atty Inq F11=View F12=Scan F13=Notes F14=Dkt.Inq F16=Inv.Cal

The ATT event has been enhanced to give it the same functionality as the ATP (Appointment of Attorney) event. When entering the ATT event, you may enter the bar number in the appropriate field and the party the attorney is appearing for, and that information will be passed to the party screen (parents) or case screen (juvenile/child).

---

## **New/Revised Forms**

The following forms are being added or revised in this release:

JC 08	(11/05)	BOND FOR APPEARANCE
JC 32	(9/06)	PUBLICATION OF HEARING
JC 34	(6/03)	FINANCIAL STATEMENT
JC 47	(9/06)	ORDER FOR ALTERNATE SERVICE
JC 89	(9/06)	ORDER TRANSFERRING PETITION FROM FORMAL CALENDAR TO CONSENT CALENDAR (DELINQUENCY)
MC 220	(3/02)	RECALL OF WARRANT/ORDER TO APPREHEND
MC 233	(5/07)	ORDER FOR FINGERPRINTS
MC 286	(6/05)	ORDER REQUESTING PRISONER BE ALLOWED TO PARTICIPATE IN COURT PROCEEDINGS

### Criminal History Reporting Enhancement - Multiple Charges

You may now submit more than three charges when submitting CHR:

Criminal History Records - EJUD

Type of Entry: EJUD

JUDORI: MI990013J    CIRORI: \_\_\_\_\_    CTD: 20071001    CFN: 07000006-00  
 NAA: FULLER/FRED/    \_\_\_\_\_    SID: \_\_\_\_\_  
 CTN: 876543210987    TCN: \_\_\_\_\_    OCA: \_\_\_\_\_

CCN: 01    ORF: \_    GOC: \_    CIT: 750/3802A    CDC: ADJ  
 CSR: \_\_\_\_\_

---

CCN: 02    ORF: \_    GOC: \_    CIT: 750/479-B    CDC: ADJ  
 CSR: \_\_\_\_\_

---

CCN: 03    ORF: \_    GOC: \_    CIT: 750/5353A    CDC: ADJ  
 CSR: \_\_\_\_\_

Add'l Information:  
 \_\_\_\_\_  
 \_\_\_\_\_

F5-Retrieve   F6-Messages   F7-Outq   F9-MJUD   F10-CJUD   **F24-Previous Menu**

Press F24 and the next three charges will process:

Criminal History Records - EJUD

Type of Entry: EJUD

JUDORI: MI990013J    CIRORI: \_\_\_\_\_    CTD: 20071001    CFN: 07000006-00  
 NAA: FULLER/FRED/    \_\_\_\_\_    SID: \_\_\_\_\_  
 CTN: 876543210987    TCN: \_\_\_\_\_    OCA: \_\_\_\_\_

**CCN: 04**    ORF: \_    GOC: \_    CIT: 750/3564A    CDC: ADJ  
 CSR: \_\_\_\_\_

---

CCN: \_\_\_    ORF: \_    GOC: \_    CIT: \_\_\_\_\_    CDC: \_\_\_  
 CSR: \_\_\_\_\_

---

CCN: \_\_\_    ORF: \_    GOC: \_    CIT: \_\_\_\_\_    CDC: \_\_\_  
 CSR: \_\_\_\_\_

Add'l Information:  
 \_\_\_\_\_  
 \_\_\_\_\_

F5-Retrieve   F6-Messages   F7-Outq   F9-MJUD   F10-CJUD   F24-Previous Menu

## Criminal History Reporting Enhancement - Single Charge

You may now submit a single charge from a petition containing multiple charges:

Petition INQ Case# 07000006 Petition# 00000001 Type DL Filed 0901 2007  
 Jurist 123 Attorney 49539 Type A Worker 98765 Public S  
 Name GOODRULING Name WINTERS Name BROWN SSN 000000000  
 Name FULLER/FRED/ DOB 729 1992 Gen M Race WA  
 Petition Opened 901 2007 Jurist 123 Adjud 1001 2007 Jurist 123 Code AAL  
 Petn Authorized 915 2007 Jurist 123 Paper Plate           
 Offense Date 801 2007 Loc LAN Petitrn MSP CTN 876543210987 Cmp           
 Reopen Date          Service Type F Destroy Date 729 2022

Num	ORIG/PACC Comment	ALCSI	AMND/PACC Comment	ALCSI Dis	Evt Attributes
<u>1</u>	<u>750 3802A</u> <u>MALIC DEST BUILD 20000 +</u>	<u>        </u>	<u>        </u>	<u>        </u>	<u>AAL PRH</u> <u>CVA CHR</u>
<u>2</u>	<u>750 479-B</u> <u>RESIST &amp; OBSTRUC OFFICER</u>	<u>        </u>	<u>        </u>	<u>        </u>	<u>AAL PRH</u> <u>CVA CHR</u>
<u>3</u>	<u>750 5353A</u> <u>RECEIVING AND CONCEALING</u>	<u>        </u>	<u>        </u>	<u>        </u>	<u>AAL PRH</u> <u>CVA CHR</u>
<u>4</u>	<u>750 3564A</u> <u>LARCENY FROM \$200 - \$1,00</u>	<u>        </u>	<u>        </u>	<u>        </u>	<u>AAL PRH</u> <u>CVA CHR</u>

More...

Nxt Tran EJD Type ADD Case# 07000006 Petn# 00000001 Event# 1 Pty           
 F1=Help F2=Nxt Tran F3=Exit F4=Prompt F5=File Sum F6=System F7=View History  
 F8=Probate F9=Name Inq F14=Dkt.Inq F16=Inv.Cal

Enter the number of the charge you wish to submit in the Event field, and press Enter:

Criminal History Records - EJUD

Type of Entry: EJUD

JUDORI: MI990013J CIRORI:          CTD: 00000000 CFN: 07000006-00  
 NAA:          SID:           
 CTN: 876543210987 TCN:          OCA:         

CCN: 01 ORF: \_ GOC: \_ CIT: 750/3802A CDC: ADJ  
 CSR:         

---

CCN:          ORF: \_ GOC: \_ CIT:          CDC:           
 CSR:         

---

CCN:          ORF: \_ GOC: \_ CIT:          CDC:           
 CSR:         

Add'l Information:  
          
        

F5-Retrieve F6-Messages F7-Outq F9-MJUD F10-CJUD F24-Previous Menu

# Financial

## New A/R Balances Report

A new A/R Balances Report has been added to the Juvenile Financial Accounts Receivable Reports menu:

```
Court ID : J 19 BETTY   Financial A/R Report Selection

 1. Cash Audit List           17. Outstanding Receivables Report
 2. Transmittal Advice       18. Financial Order Audit Report
 3. List Accounting Codes    19. A/R Billing
 4. Accounts Paid Report     20. Showcause Report
 5. Cost of Care Inquiry Print 21. Delinquent Letter Print
 6. List of Orders           22. ADCF/Ward Report
 7. Budget List              23. Case Status Report
 8. Budget Year              24. Account Group Report
 9. Price List               25. YTD Dollars for AR Orders
                             26. YTD Dollars by Acct & Price
11. DSS207 Reports           27. Combined Cir & Juv Transmittal
12. Income Status Report    28. Restitution Order Report
13. Price Group Report       29. Cash Adjustments Report
14. A/R & A/P by Case        30. Voided Receipts Report
15. Transactions by Account  31. A/R Transaction by Price Code
16. Transactions by Case     32. A/R Balances Report

Make your selection: ___

Nxt Tran  RPT Type  FIN  Case# 20070100  _1  Petn# 00000000  Event# ___  Party ___
F1=Help  F2=Nxt Tran  F3=Exit  F4=Prompt          F6=System
F8=Probate  F9=Name Inq.      F14=Dkt. Inq  F16=Inv. Cal
```

Select #32 from the reports menu:



**Case name  
sequence:**

wish to set your outq to “hold” before running this report with detail.

Enter “X” to generate the report in case name sequence or leave the field blank to generate the report in case number sequence.

The following is a sample of the A/R Balances Report:

CASE NUMBER	PRY	NAME	DOB	ORDERED	AMOUNT PAID	AMOUNT DUE	LST PMT DT	DAYS F.L.PMT
06019195-00	M01	MANDY MARSH		300.00		300.00		
06019196-00	J01	RANDY RUDOLPH	11/ 1/1991	2,703.00	250.00	2,453.00	9/12/2007	49
06019246-01	M01	GRACE GREEN		110.00		110.00		
06019282-00	J01	LARRY LOCKWOOD	3/ 7/1990	165.00		165.00		
06019285-00	J01	STEVEN SULLIVAN	3/28/1991	500.00	120.00	380.00		
06019317-00	PTS	DAVID & DIANE DONNOVAN		3,300.00		3,300.00		
07006861-00	J01	THOMAS THOMPSON	2/13/1991	150.00	5.00	145.00	8/23/2007	69
07006895-00	J01	ZOEY ZEPHER	4/ 6/1994	1,077.36		1,077.36		
07019580-00	J01	VICTOR VINCENT	3/16/1990	700.00	350.00	350.00	8/24/2007	68
07019581-00	J01	JOHN JOHNSON	2/ 8/1993	45.00		45.00		
07019620-00	J01	TERRY THOMPSON		65.00		65.00		
87004326-01	F01	PAUL POWERS		1,287.50	984.72	302.78	5/19/2000	2721
98005164-05	F01	NED NORTH		268.00	5.00	263.00	10/29/2007	2
99012865-00	M01	GRACIE GALLOWAY		2,144.28	400.00	1,744.28	8/ 6/2007	86
99013319-01	M01	KERRY KING		1,392.00	1,159.00	233.00	9/22/2004	1134

CASE NUMBER	PRY	NAME	DOB	ORDERED	AMOUNT PAID	AMOUNT DUE	LST PMT DT	DAYS F.L.PMT
		GRAND TOTAL FOR ACTIVE ACCOUNTS .....		93,699.12	54,701.94	38,997.18		
		GRAND TOTAL FOR INACTIVE ACCOUNTS .....						
		GRAND TOTAL .....		93,699.12	54,701.94	38,997.18		

### DSS Setup Third Screen Added for In Home Care Expenditures

Court ID : J 19                      DSS 207 Report Maintenance  
From 2007 10 1 To 2008 9 30      Screen no. 13C III  
III. Total IN-Home care  
    (Total from IHC Addendum DSS-2396)

Acct	Code	R	8	9	Y or N	entry	Acct	Code	R	8	9	Y or N	entry
E102	Y	Y	Y				---	N	N	N			
IN HOME CARE EXPENSES						00149.001	---	N	N	N			
---	N	N	N				---	N	N	N			
---	N	N	N				---	N	N	N			
---	N	N	N				---	N	N	N			
---	N	N	N				---	N	N	N			
---	N	N	N				---	N	N	N			
---	N	N	N				---	N	N	N			
---	N	N	N				---	N	N	N			

F3=Exit                      Page Up/Down

We have added a third screen to the In Home Care expenditures section of the 207 setup screens. For those courts that have more than 32 In Home Care expenditure accounts, you will now have Screen 13C, which will allow for additional 16 expenditure accounts.

