Business Process & QRG Inventory

Process ID	Business Process	Process Result	Person Approved	QRGs Created	QRGs Tested
PRO-1	Initiating a Case	Ready for Testing	0		
PRO-2	Case Inquiry	Ready for Testing	0		
PRO-3	Party Inquiry	Ready for Testing	0		
PRO-4	Data Entry Events	Ready for Testing	0		
PRO-5	Group Add Events	Ready for Testing	0		
PRO-6	Scheduling Hearings Calendar	Ready for Testing	0		
PRO-7	Scheduling Hearings (Case)	Ready for Testing	0		
PRO-8	Canceling a Hearing Case	Ready for Testing	0		
PRO-9	Canceling a Hearing (Calendar)	Ready for Testing	0		
PRO-10	Reschedule Hearing (Case)	Ready for Testing	0		
PRO-11	Reschedule Hearing (Calendar)	Ready for Testing	0		
PRO-12	Flex Calendar	Not Applicable	0		
PRO-13	Rescshedule Cases (Batch) - N/A	Not Applicable	0		
PRO-14	Entering Minutes	Ready for Testing	0		
PRO-15	Scanning	Ready for Testing	0		
PRO-16	Batch Scan/Group Add Events - N/A	Ready for Testing	0		
PRO-17	Delete Hearing (Case)	Ready for Testing	0		
PRO-18	Delete Hearing (Calendar)	Ready for Testing	0		
PRO-19	Add Related Cases	Ready for Testing	0		
PRO-20	Case File Location - N/A	Ready for Testing	0		
PRO-21	Add Attorney	Ready for Testing	0		
PRO-22	Remove Attorney	Ready for Testing	0		
PRO-23	Make Attorney Lead - N/A	Ready for Testing	0		
PRO-24	Entering Motions and Other Documentation via Over the Counter or Mail	Ready for Testing	0		
PRO-25	Adding Scanned Documents - Indigent Petitions	Ready for Testing	0		
PRO-26	Case Forms	Ready for Testing	0		
PRO-27	Add Disposition/Judgment	Waiting for PDD	0		
PRO-28	Amend/Modify Dispositions or Judgments	Waiting for PDD	0		
PRO-29	Statistical Closure and Case Status	Ready for Testing	0		
PRO-30	Conduct Adjustment of Fee/Charge - N/A	NOT APPLICABLE	0		
PRO-31	Overpayments - N/A	NOT APPLICABLE	0		
PRO-32	Misc. Payments - N/A	NOT APPLICABLE	0		
PRO-33	Remove Future Hearing	Ready for Testing	0		
PRO-34	Add Cross Reference Number	Ready for Testing	0		
PRO-35	Accepting Documents on Restricted Cases - N/A	NOT APPLICABLE	0		
PRO-36	Alias Summons - N/A	NOT APPLICABLE	0		
PRO-37	Consolidation of Cases	Ready for Testing	0		
PRO-38	Impound/Restricted Files - N/A	NOT APPLICABLE	0		
PRO-39	Motions/Events and Event Relationships	Ready for Testing	0		
PRO-40	Appeal SPC to Civil Superior court	Ready for Testing	0		
PRO-41	0	0	Not Started		
PRO-42	Assigning a judicial official to a case	Ready for Testing	0		
PRO-43	Delete/Modify/View Judgment	Ready for Testing	0		
PRO-44	Add A Court Session	IN PROGRESS	0		
PRO-45	Transfer Case	Ready for Testing	0		
PRO-46	Assign Judicial Official to Case	Ready for Testing	Sharon Horace		
PRO-47	Change of Venue	Ready for Testing	0		
PRO-48	Response/Answer/Motion to Extend Time	Ready for Testing	0		
PRO-49	Findings and Custody Order	Ready for Testing	0		
PRO-50	Delete a Case	Ready for Testing	0		
PRO-51	Transfer Case to Another County	Ready for Testing	0		
PRO-52	Service	Ready for Testing	0		
PRO-53	Add Disposition/Judgment (Firearms Component)	Waiting for PDD	0		
PRO-54	Filing Confidential Documents	Ready for Testing	0		
PRO-55	0	Not Started	0		

Summary Information		
Process Name:	**Initiating a Case**	Click Here to go back to Process Inventory Tab
Process Description:	**How to Enter a Special Proceeding Confidential (Commitment or Other) Case**	
Status:	**Ready for Testing**	
Result:	**Ready for Testing**	
Person Approved Testing:		

Detail Information

Step	Description	Comments
1	Click "**Add**" on the menu bar	
2	Select "**Case**"	
3	Select "**Probate or Mental Health**"	
4	Select "**New**"	
5	Select "XX County" node	
6	Select "**Special Proceeding Confidential (Commitment)**" or "**Special Proceeding Confidential (Other)**"	
7	Select "**SubType**" dropdown. "**Hearing of Case Originating in Other County**" is a new option in the dropdown list. If unknown at case add,	
8	Select the "**Parties**" tab	
9	Select the **"Parties"** Tab and click "**Add Party**"	
10	Click the drop down arrow beside **Connection** and select "**Respondent"**.	
11	Click the looking glass to the right of the **Party** field.	
12	In the "**Find a Party box**" enter as much information as you have on the party and then select "**search**".	
13	If the correct party is in the search results select that party by clicking on the name. If the correct party is not a choice, click the "**Add Party**" button and add the respondents information, continue through prompts.	
14	Click **Continue**	
15	Click "**Add Party**" to add a new party	
16	Click the round button next to **All Types**	
17	Click the drop down arrow beside **Connection** and select the appropriate party or "**Petitioner"**.	
18	Click the looking glass to the right of the **Party** field.	
19	In the "**Find a Party box**" enter as much information as you have on the party and then select "**search**".	
20	If the correct party is in the search results select that party by clicking on the name. If the correct party is not a choice, click the "**Add Party**" button and add the respondents information, continue through prompts.	
21	click the plus sign "**(+)"** to add a **Relationship** to the Respondent	
22	Click "**Continue**"	
23	If there are more parties to be entered, continue with the above steps until all plaintiffs are entered.	
24	Once all parties are entered, click "**continue**"	
25	Click **Save** to Save your Case.	
26	The Case Filed screen displays with a Case number. Click **Done**.	

Summary Information		
Process Name:	**Case Inquiry**	Click Here to go back to Process Inventory Tab
Process Description:	**How to Search for a Case**	
Status:	**Ready for Testing**	
Result:	**Ready for Testing**	
Person Approved Testing:		

Detail Information		
Step	**Description**	**Comments**
1	Select "**Find**" from the Menu Bar	
2	Select **"Case"**	Will it only show up cases for their county or statewide? Use statewide for gun permits or county only? Also confidential who will see confidential cases?
3	Select **Case Manager** (if necessary)	
4	If you have the case number, enter it in the Case Number Field and press enter or **"Search"**	
5	If you have party's name, select the radio button that applies, "**type of party (Person, Nickname or Business)**" and Press **"Enter"** key (keyboard) or click "Search" (Alt+S)	
6	Open the case by clicking the case number	

Kim Whitfield

Summary Information		
Process Name:	**Party Inquiry**	Click Here to go back to Process Inventory Tab
Process Description:		
Status:	**Ready for Testing**	
Result:	**Ready for Testing**	
Person Approved Testing:		

Detail Information

Step	Description	Comments
1	Select "**Find**" from the Menu bar	
2	Select "**Party**"	
3	Select "**Case Manager**" (if necessary)	
4	To search by name, enter the "**first and last name**" in the first and last name fields. You can search by only using the last name of a party in the advanced search mode.	Will it only show up cases for their county or statewide? Use statewide for gun permits or county only? Also confidential who will see confidential cases?
5	Press **"Enter"** (keyboard) or Click **Search**.	
6	Click the name of the party you want to view.	

Summary Information		
Process Name:	**Data Entry Events**	Click Here to go back to Process Inventory Tab
Process Description:	**Adding an Event**	
Status:	**Ready for Testing**	
Result:	**Ready for Testing**	
Person Approved Testing:		

Detail Information

Step	Description	Comments
1	Select **"Find"** from the Menu bar	
2	Select "**Case"**	
3	Select "**Case Manager**"	
4	Enter the case number in the case number field	
5	Press "**Enter**" (keyboard) or click **"Search" (Alt+S)**	
6	Verify case number in Odyssey matches that of the document	
7	Click on the **"Events"** Tab	
8	Click on the plus **"(+)"** sign	
9	Enter code event code or use drop down to select the desired event type.	
10	If the you don't know the code or the name of the event type, Click on the **(F4) key** and enter your search word in the	
11	Once the event type is populated in the field, click Save.	
12	Right click on the Event and select **"Scan Document"**.	

Summary Information		
Process Name:	**Group Add Events**	Click Here to go back to Process Inventory Tab
Process Description:		
Status:	**Ready for Testing**	
Result:	**Ready for Testing**	
Person Approved Testing:		

Detail Information

Step	Description	Comments
1	Click on **"Tools"**	
2	Click on **"Case"**	
3	Click on **"Group Add Events"**	
4	Click on "Case Manager"	
4	Enter the Case Number or search for the case by clicking on the **'magnifying glass'** symbol	
5	Use the dropdown for **"Type"** and select your Event(s) to enter for each case(s)	
6	Verify that the Date is correct, if not enter the correct date	
7	If necessary enter any **"Due"** or **"Complete"** date(s)	
8	Click on **"Add"**	
9	Repeat the process for all your cases	
10	Once completed entering your Events, click on **"Save"**	

Summary Information		
Process Name:	**Scheduling Hearings Calendar**	Click Here to go back to Process Inventory Tab
Process Description:		
Status:	**Ready for Testing**	
Result:	**Ready for Testing**	
Person Approved Testing:		

Detail Information

Step	Description	Comments
1	Click on **"Tools"**	
2	Click on **"Scheduling"**	
3	Click on **"View Calendar"**	
4	Select "Case Manager"	
5	If the **'Select Calendar'** box appears do the following:	
	a) Using the dropdown for 'View' select either **'Monthly'** or '**Weekly'**	
	b) Select location	
	c) Using the dropdown for **'Calendar'** select your calendar of choice.	
	d) Click Continue	
6	Verify that the correct calendar has appeared. If the incorrect calendar appears click on the **'Calendar'** box and	
7	Click on the date and applicable session you wish to schedule your hearing	
8	Click on the **"+"** sign	
9	Type in the case number	
10	Use the dropdown for **"Hearing Type"** options and select your hearing type	
	*If adding more than one case click on the **'Add Next'** button to enter your next case	
11	Click **"Save"**	
	To Add a hearing from the Events Tab	
1	From the **"Events tab"** of the case, right-click the event and select Add Related Hearing to display the Find Court Sessions dialog box.	
2	From the Find **"Court Sessions**" dialog box:	
3	Select the Type of hearing you wish to add.	
4	Select the From date.	
5	Select the appropriate Calendars.	
6	Select the appropriate Resources.	
7	Click "**Find"** (ALT+F).	
	The **"Session Search Results"** display to the left.	
8	Select the appropriate Session you want by clicking on it.	
	The Selected Session will pull to the right.	
9	Click **"Save"** (ALT+S) to add the hearing to the case.	
	To Add hearing sessions	
1	Click on **"Tools"**	
2	Click on **"Scheduling"**	
3	Click on **"View Calendar"**	
4	Select "**Case Manage**r"	
5	Click on the **"+"** sign	
6	The "**Add Court Session**" box appears	
7	Type in the "**Session Name**" - Involuntary Commitment	
8	select the **Date**	
9	Select the **Case Category** by clicking the Find icon - select **Probate**	
10	Select the **Start time** and **End time**	
11	Select the "**Resources**" to add a Judge to the Calendar Session if applicable	
12	Go to "**Capacity Details**" section and select **"Hearing Start At**" - Same Time	
13	Select "**Limit Based On**" - Quantity and enter the maximum "**# of Hearings**" that can be scheduled for that day.	
14	Click **Save**	
	To copy session to multiple dates	
	Right click on session and select "**Copy Court Session**"	
	Change **Date**	
	Click **Save**	

Summary Information		
Process Name:	**Scheduling Hearings (Case)**	Click Here to go back to Process Inventory Tab
Process Description:		
Status:	**Ready for Testing**	
Result:	**Ready for Testing**	
Person Approved Testing:		

Detail Information

Step	Description	Comments
1	Click "Find" in the top menu bar	
2	Select "Case Manager"	
3	Enter the Case Number or search for the case by clicking on the **'magnifying glass'** symbol	
4	Click on the "Hearings" tab	
5	Click on the **"+"** sign	
6	From the **"TYPE"**, use the dropdown to select hearing type	
7	Next, beside "Calendars", click on the magnifying sign and select the calendar to schedule your hearing and click on	
NOTE	**OR** Simply can click on the "Find" button without selection a calendar then select a session. However, the results may show results from various calendars in the Division	
8	Click on the **'Find'** button	
	Click on the "+" sign next to "**Select Sessions**"	
9	From the 'Session Search Results' section, select the hearing date by clicking the appropriate hearing date. The	
10	**Note:** If you select the incorrect hearing, from the **"Selected Sessions"**, click on the **"X"** next to the incorrect hearing.	
11	Click **"Save"**	

Summary Information		
Process Name:	**Canceling a Hearing Case**	Click Here to go back to Process Inventory Tab
Process Description:		
Status:	**Ready for Testing**	
Result:	**Ready for Testing**	
Person Approved Testing:		

Detail Information		
Step	**Description**	**Comments**
1	Click "Find" in the top menu bar	
2	Select "Case Manager"	
3	Enter your case number or name to locate case.	
4	Click on the **"Hearings"** Tab	
5	Right Click on the hearing you wish to cancel	
6	Select **"Cancel"**	
7	From the dropdown select a cancel reason and add a comment if needed.	
8	Click **"Save"** button	

Summary Information		
Process Name:	**Canceling a Hearing (Calendar)**	Click Here to go back to Process Inventory Tab
Process Description:		
Status:	**Ready for Testing**	
Result:	**Ready for Testing**	
Person Approved Testing:		

Detail Information		
Step	**Description**	**Comments**
1	Click on **"Tools"**	
2	Click on **"Scheduling"**	
3	Click on **"View Calendar"**	
4	Select "Case Manager"	
4	Verify that the correct calendar has appeared. If the incorrect calendar appears click on the **'Calendar'** box and using the	
5	Click on the date and applicable session you wish to cancel	
6	Right click on the hearing and select "Cancel Hearing" and add a comment if needed	
7	From the dropdown select a cancel reason	
8	Click **"Save"**	

Summary Information		
Process Name:	**Reschedule Hearing (Case)**	Click Here to go back to Process Inventory Tab
Process Description:		
Status:	**Ready for Testing**	
Result:	**Ready for Testing**	
Person Approved Testing:		

Detail Information

Step	Description	Comments
1	Click "Find" in the top menu bar	
2	Select "Case Manager"	
3	Enter your case number or name to locate case.	
4	Select "Case Manager"	
5	Click on the **"Hearings"** Tab	
6	Left Click on the hearing you wish to reschedule	
7	Select **"Reschedule"**	
8	Select either the **"Reset"** or **"Continuance"** option	
9	From the dropdown select a reschedule reason	
10	Beside Requested by, click the looking glass and select the party that it is requested by and click continue.	If the continuance was requested by the court, the only options in the drop down are Petitioner and Respondent, Court official or a list of court officials should be selected.
11	Select "Continue"	Got error message and can not continue. I put it in BP Inventory sheet in sharepoint.

Summary Information		
Process Name:	**Reschedule Hearing (Calendar)**	Click Here to go back to Process Inventory Tab
Process Description:		
Status:	**Ready for Testing**	
Result:	**Ready for Testing**	
Person Approved Testing:		

Detail Information

Step	Description	Comments
1	Click on **"Tools"**	
2	Click on **"Scheduling"**	
3	Click on **"View Calendar"**	
4	Click on "Case Manager"	
5	Verify that the correct calendar has appeared. If the incorrect calendar appears click on the **"Calendar"** box and	Cant go any further, no calendars set up except for juvenile.
6	Click on the date and applicable session	
7	Locate the case you wish to reschedule	
8	Right click on the and select **"Reschedule Now"**	
9	From the dropdown select a reschedule reason	
10	Click on **"Continue"**	
11	From the Find a Court Session, Click on magnifying glass sign to select the calendar to schedule your hearing and click	
12	Click on the **"Find"** button	
13	From the **'Session Search Results'** select the hearing date by clicking the appropriate hearing date	
14	Click "Continue"	Got same error message as Pro-11

Summary Information		
Process Name:	**Flex Calendar**	Click Here to go back to Process Inventory Tab
Process Description:		
Status:	**Not Started**	
Result:	**Not Applicable**	
Person Approved Testing:		

Detail Information

Step	Description	Comments
1	Click on **"Tools"**	**no flex calendar configured for spc cases**
2	Click on **"Scheduling"**	
3	Click on **"View Calendar"**	
4	Click on "Case Manager"	
4	Verify that the correct calendar has appeared. If the incorrect calendar appears click on the **"Calendar"** box and	
5	Click on the date and applicable session	
6	Click on the printer icon	
7	When the dialog box appears on screen, make sure the dropdown has **"Flexible Calendar"** in it. Click **"Continue"**	

Summary Information		
Process Name:	**Rescshedule Cases (Batch) - N/A**	Click Here to go back to Process Inventory Tab
Process Description:		
Status:	**Not Started**	
Result:	**Not Applicable**	
Person Approved Testing:		

Detail Information

Step	Description	Comments
1	Click on **"Tools"**	
2	Click on **"Scheduling"**	
3	Click on **"View Calendar"**	
4	Click on "Case Manager"	
4	Verify that the correct calendar has appeared. If the incorrect calendar appears click on the **"Calendar"** box and	
5	Click on the date and applicable session	
6	If rescheduling the entire session, double clicking the white **"Mark",** next to the plus sign (+).	
7	If rescheduling individual cases click on the **"X"** next to each case **Note:** A clipboard will appear	
8	After you have selected all your cases to reschudule, click on **"Exit"** (bottom right side of screen)	
9	Navigate to the desired session date and left click to enter the session	
10	Next, the Calendar will appear again. Click on the Session you wish to reschedule your hearings.	
11	Click the **'Clip Board'** icon.	
12	If rescheduling the entire session, click on **"Select All"**	
13	If rescheduling individual cases click on the box next to each case.	
14	Then select a **"Reason"** using the corresponding drop down box. If the reason for rescheduling is the same for all	
15	Select **"Reschedule"**	

Summary Information		
Process Name:	**Entering Minutes**	Click Here to go back to Process Inventory Tab
Process Description:		
Status:	**Ready for Testing**	
Result:	**Ready for Testing**	
Person Approved Testing:		

Detail Information

Step	Description	Comments
1	Click on **"Tools"**	
2	Click on **"Scheduling"**	
3	Click on **"View Calendar"**	
4	Click on "Case Manager"	
5	Verify that the correct calendar has appeared. If the incorrect calendar appears click on the **'Calendar'** box and using	
6	Click on the date and applicable session	
7	Hover over the desired hearing and right click	
8	Select **"Enter Minutes"**	"Enter minutes" wil be greyed out for hearings scheduled in the future.
9	Using the **"Result"** drop down select your desired result	
10	Perform all relevant data entry by clicking on the corresponding link(s)	Each area heading is a yellow hyperlink. Click the link to go to the menu/pop-up box to add the details. Sections that are not applicable or not yet applicable will have grey headings/no hyperlink
11	Select **"Save"**	

Summary Information		
Process Name:	**Scanning**	Click Here to go back to Process Inventory Tab
Process Description:		
Status:	**Ready for Testing**	
Result:	**Ready for Testing**	
Person Approved Testing:		

Detail Information		
Step	**Description**	**Comments**
1	Navigate to a case record.	
2	Go to the **"Events"** tab.	
3	Hover over the associated event and right click.	
4	Select "**Scan Document"**	
5	Use the drop down arrow to select the type of document.	

Summary Information		
Process Name:	**Batch Scan/Group Add Events - N/A**	Click Here to go back to Process Inventory Tab
Process Description:		
Status:	**Ready for Testing**	
Result:	**Ready for Testing**	
Person Approved Testing:		

Detail Information

Step	Description	Comments
1	Click on **Tools**	
2	Click on **Workflow**	
3	Click on **Batch Scan Documents**	
4	Click on Case Manager	

Summary Information		
Process Name:	**Delete Hearing (Case)**	Click Here to go back to Process Inventory Tab
Process Description:		
Status:	**Ready for Testing**	
Result:	**Ready for Testing**	
Person Approved Testing:		

Detail Information		
Step	**Description**	**Comments**
1	Select **Find**	
2	Click Case Manager	
3	Select Case: The Search screen will appear	
4	Enter case number or name	
5	Click on Enter button or Search (bottom right of screen)	
6	Select the **Hearing** tab	
7	Right click on the hearing that needs to be deleted	
8	Select **Delete**	
9	Select yes when promted to delete	
10	Click save on the bottom right	

Summary Information		
Process Name:	**Delete Hearing (Calendar)**	Click Here to go back to Process Inventory Tab
Process Description:		
Status:	**Ready for Testing**	
Result:	**Ready for Testing**	
Person Approved Testing:		

Detail Information

Step	Description	Comments
1	Click on "**Tools"**	
2	Click on **"Scheduling"**	
3	Click on **"View Calender"**	
4	Click on **"Case Manager"**	
5	**Note:** If this is your first time viewing a Calendar, then Select: View (Monthly, Weekly), Location and Calendar	
6	Next, click on the day and **"Session"** where the hearing appears.	
7	Right click on the hearing you wish to delete.	
8	Click on **"Delete Hearing"**	
9	Click on **"Yes"** button when the message **"Are you sure that you want to delete this hearing?"**	

Summary Information		
Process Name:	**Add Related Cases**	Click Here to go back to Process Inventory Tab
Process Description:		
Status:	**Ready for Testing**	
Result:	**Ready for Testing**	
Person Approved Testing:		

Detail Information

Step	**Description**	**Comments**
1	Select "**Find**"	
2	Select **Case:** Search screen will appear	
3	Select Case Manager	
3	Enter case number or name	
4	Click on "**Enter**" button or **Search** (botton right of screen)	
5	Click correct case number if case doesnt automatically come up.	
6	Click on "**Details**" tab	
7	Click on plus sign (+) in **Related Cases** section	
8	Enter the Case number you wish to	
10	Select **Reason** from the drop down.	This can also be a case from another county.
11	Click on Continue.	
12	The case will now appear in the	
	NOTE: If for some reason the	
13	Click on **Save**	

Summary Information		
Process Name:	**Case File Location - N/A**	Click Here to go back to Process Inventory Tab
Process Description:		
Status:	**Ready for Testing**	
Result:	**Ready for Testing**	
Person Approved Testing:		

Detail Information		
Step	**Description**	**Comments**
1	Click on **"Find"**	
2	Click on **"Case"** (Seach screen will appear)	
3	Click on Case Manager	
3	Enter a case number (or party name to locate a case)	
4	Click on Enter button or Search (bottom right of screen), then select a case.	
5	Click on "Detail" tab	
6	Click on plus sign (+) next to the "Case File" section.	
	Note: If there is a current location already selected, always click on the plus sign (+) to enter the new location. Odyssey keeps a history of the locations. If you wish to see the history of the file location, click on the current location or the (+) sign and click on the "View History" button.	
7	Next, the "Move Case File" box should appear. Using the drop down, select the "Location/Custody" of the file.	

Summary Information		
Process Name:	**Add Attorney**	Click Here to go back to Process Inventory Tab
Process Description:		
Status:	**Ready for Testing**	
Result:	**Ready for Testing**	
Person Approved Testing:		

Detail Information

Step	Description	Comments
1	Click on Find > Case > Case Manager > Enter Case Number or Party Info	
2	Click on the **Parties** tab, click on "**Add Attorney"**.	
3	Click on the box next to the party name who will receive the attorney and then click on "**Continue"**.	
7	Next, click on the **eyeglass** next to the **attorney box** and search by name/or bar number.	
8	Click the Attorney name to select the attorney.	
9	Click the drop down arrow to select the **type** of attorney.	
10	Click **"Continue"**.	
11	Click on **"Save"** (bottom right side of screen)	

Summary Information		
Process Name:	**Remove Attorney**	Click Here to go back to Process Inventory Tab
Process Description:		
Status:	**Ready for Testing**	
Result:	**Ready for Testing**	
Person Approved Testing:		

Detail Information

Step	Description	Comments
1	Click on Find > Case > Case Manager > Enter Case Number or Party Info	
2	Click on **Parties** Tab.	
3	Click the Attorney name	
4	Click the Attorney box under the Connection section	
5	Enter the date in the **"Removed"** date field.	
6	Select the Reason for removal form the dropdown options. Click on **"Continue"** button (twice)	
7	Click "Save"	
		There is also a way to do it from the Minutes Screen. Need minutes recorded to do this.

Summary Information		
Process Name:	**Make Attorney Lead - N/A**	Click Here to go back to Process Inventory Tab
Process Description:		
Status:	**Ready for Testing**	
Result:	**Ready for Testing**	
Person Approved Testing:		

Detail Information		
Step	**Description**	**Comments**
1	Click on Find > Case > Case Manager > Enter Case Number or Party Info	**Can not Proceed - LEAD is Greyed out and Not an option in SPC cases**
2	Navigate to the **Parties** Tab	
3	Right Click on the Attorney Name	
4	Select Make Lead	

Summary Information		
Process Name:	**Entering Motions and Other Documentation via Over the Counter or Mail**	Click Here to go back to Process Inventory Tab
Process Description:		
Status:	**Ready for Testing**	
Result:	**Ready for Testing**	
Person Approved Testing:		

Detail Information		
Step	**Description**	**Comments**
1	Click on Find > Case > Case Manager > Enter Case Number or Party Info	
2	Navigate to the **Events** Tab	
3	Click on (+) and add the applicable **Event**(s) and **Save**. **Note**: If you are unsure of the event code, you may use the drop down to select the dsired evey type. Also, Click on the (F$) key and enter your search word in the "**Description Box**". Next, click on "**Search**" (Alt +S) and select your event type.	
4	Right click on the Event and select "**Add Related Hearing**".	
5	Select "**Type**"	
6	Click on **Date** next to the From Box.	
7	Select "**Calendars**" and choose the appropriate calendar then click "**continue**"	
8	Click "**Find**" in middle of box and select the session.	
9	Click "**Save**"	
10	Right click the event and choose "**Scan Document**"	
11	Select the Type and enter a description if necessary.	
12	Click **Scan**	

Summary Information		
Process Name:	**Adding Scanned Documents - Indigent Petitions**	Click Here to go back to Process Inventory Tab
Process Description:		
Status:	**Ready for Testing**	
Result:	**Ready for Testing**	
Person Approved Testing:		

Detail Information

Step	Description	Comments
1	Click **"Find"** on the menu bar	
2	Click **"Case"**	
3	Click **"Case Manager"**	
4	If you have the case number, enter it in the Case Number Field and press enter or **"Search"** in the command legend.	
5	If you have party's name, select the radio button that applies, "**type of party (Person, Nickname or Business)**" and	
6	Click on **"Event"** Tab	
7	Click on the "(+) icon".	
8	The Add Event dialog box displays.	
10	Use the drop down arrow beside Type and select "Application for Fee Waiver".	
11	Click **"Save"**	
12	Right Click on event and select **"Scan Document"**.	
13	The Add New Image dialog displays.	
14	From the Type dropdown menu, select **"Application"**.	
15	From the Security Group dropdown menu, select "Public".	
16	If needed, in the Description text box, enter a description of the document.	
17	Click **"Scan"**.	
18	The application displays in document window.	
19	Once there is a decision on the **"Application for Fee Waiver"**, update the status of the Case Event.	
20	On the Application for Fee Wiaver event, right click and select **"Add Event Status"**.	
21	The Add Event Status dialog box displays.	
22	From the Event Status dropdown, select either **"Granted"** or **"Denied"**.	
23	If needed, in the Comment text box and information.	
24	If you select **"Granted"**, go to the **Detail** tab to add a Case Flag.	
25	On the Case Flags section, click the "(+) icon" and select the "Fee Waiver Filed" flag.	
26	Click **"Continue"**.	
27	If you want to add additional proof used to assess whether or not the the Party is indigent, go to the Parties tab.	
28	Click on the appropriate Party name.	
29	The Modify Case Party Details dialog box displays	
30	Click on the Party Name.	
31	Click on the Assessments tab.	
32	Click on the "(+) icon".	

Summary Information		
Process Name:	**Case Forms**	Click Here to go back to Process Inventory Tab
Process Description:		
Status:	**Ready for Testing**	
Result:	**Ready for Testing**	
Person Approved Testing:		

Detail Information

Step	Description	Comments
1	Click on Find > Case > Case Manager > Enter Case Number or Party Info	
2	On the bottom right corner of the **Summary** screen (Tab) and select **Forms**	
	Note: Before selecting form, make sure you check the **"Print Preview"** box by clicking on the box. Next, Click on the	
3	Select the desired form and complete the form prompts.	
4	Click **Attach** in the lower left corner to attach the form to the case	
5	Click **Save** in the lower left corner to save the case.	

Summary Information		
Process Name:	**Add Disposition/Judgment**	Click Here to go back to Process Inventory Tab
Process Description:	**PENDING CONFIGURATION OF JUDGMENT COMPONENT FOR SPC CASES**	
Status:	**Failed**	
Result:	**Waiting for PDD**	
Person Approved Testing:		

Detail Information		
Step	**Description**	**Comments**
1	From the **Disposition** Tab, click the **Judgment** Hyperlink.	
2	The **Add Judgment dialog** box appears.	
3	Select the **Type of judgment** by clicking the drop-down arrow.	
4	Enter the judgment Date.	
5	Select the **Judge** (judicial officer) imposing the judgment.	
	**Judge will default to judicial officer assigned to the case. If it is different, select the judge using the dropd*	
6	Select whether the judgment affects the **case aging clock**.	
	<u>**Judgment Components**</u>	
8	To select Judgement Components, click the **Judgment picker icon**.	
9	Select the appropriate judgement components that are applicable to the causes you selected	NICS Judgment Component not configured for SPC cases. will not be ready until after go live.
10	click the **Continue** (ALT+C) button.	
	**Select the components in the order you want them to display.*	
11	Click **Continue** then click **Add**.	
	The Judgment Components display.	
12	Enter the required data.	
13	Click **Save**.	
14	The disposition displays.	

Summary Information		
Process Name:	**Amend/Modify Dispositions or Judgments**	Click Here to go back to Process Inventory Tab
Process Description:		
Status:	**Failed**	
Result:	**Waiting for PDD**	
Person Approved Testing:		

Detail Information		
Step	**Description**	**Comments**
	Amend Judgment	CAN NOT PROCEED, see comments in PRO-27
	A judgment can be amended if a change is based on a formal court action.	
1	From the **dispositions** tab of the case, click the **Judgment** link to access the **View Judgment History** dialog box.	
2	Click the **Amend Judgment** link.	
3	From the Amend Judgment dialog box:	
4	Select the **Type of Amendment** by clicking the drop-down arrow	
5	The Date will default to todays date. Change as needed.	
6	Select the Reason for amending the judgment by clicking on the **Reason picker icon**. From the Select Codes dialog box, select the Reason and click continue.	
7	Update any existing component information, add any judgment components, or delete any existing components no longer needed.	
8	Click **Save** (ALT+S) to save the amended judgment.	
9	The case is updated with the amended disposition event information	
	*It will display with a red “A” next to the disposition. This indicates that the disposition has been amended.	
	Modify Judgment Events	
	A judgment can be modified if a mistake has been made.	
1	Click the **Judgment** link on the Disposition tab	
2	The **View Judgment History** dialog box appears.	
3	Click the judgment event to be modified.	
4	From the **Modify Judgment** (or Modify Amended Judgment) dialog box, modify existing information as needed.	
5	Add or delete any judgment components as needed.	
6	Click **Save** (ALT+S).	

Summary Information		
Process Name:	**Statistical Closure and Case Status**	Click Here to go back to Process Inventory Tab
Process Description:	**Case Status Passed (see line 31) Statistical Closure failed due to no configured selections**	
Status:	**Ready for Testing**	
Result:	**Ready for Testing**	
Person Approved Testing:		

Detail Information

Step	Description	Comments
	Add Statistical Closure	
	Statistical Closure is utilized for State Reporting on how a case is closed. If this aspect has not been auto-configured complete the following.	
1	Click **"+"** in the **Statistical Closure header** of the **Disposition** tab.	
2	The **Add Statistical Closure dialog box** appears. Complete the following fields: Select the appropriate Statistical Closure by clicking the drop-down arrow. (Closed) Enter the **Date** the Statistical Closure was added. Enter a **comment** if desired.	
3	Click **Continue** (ALT+C).	
	Modify Statistical Closure	
1	Click into the current **statistical closure**.	
2	From the **Modify Statistical Closure dialog box**, update any of the statistical closure information.	
3	Click **Continue** (ALT+C) to save the changes.	
	Delete Statistical Closure	
	Statistical closures can be deleted if they are entered in error or on the wrong case. However, only the most current statistical closure may be deleted.	
1	Right-click the current **statistical closure**.	
2	Select **Delete**.	
	Add Case Status	
	The case may change statuses throughout the lifecycle of the case record. You can update the case status from the Detail or Disposition tab of a case. This training module refers to the Disposition tab, but the steps outlined below work the same way on the Detail tab.	The case is auto configured to Pending until case is closed. There is a **Case Close** button on the top right side of the disposition tab without having to go into the Cae Status dialog box.
1	Access the **Disposition** tab of the case.	
2	Click the **"+"** to add a Case Status.	
3	The **Add Case Status** dialog box appears. Complete the **Status** field by selecting the status from the options listed (configured).	
4	Enter the **Date** the Case Status changed.	
5	Enter any desired **comments**.	
6	Click **Continue** (ALT+C).	
	Modify Case Status	
	If the Case Status is not auto-configured based on Disposition, complete the following:	
1	Click into the current **Case Status**. The **Modify Case Status** dialog box appears.	
2	Choose the desired status by clicking the drop-down arrow.	
3	Enter the **Date** the status was modified.	
4	Enter any desired **comments**.	
5	Click **Continue**.	
	Delete Case Status	
	Case statuses can be deleted if they are entered in error.	
1	Right-click the current **Case Status**.	
2	Click **Delete**. *When a **case status** is deleted, the *previously* entered status moves up to become the *new status* .	

Summary Information		
Process Name:	**Remove Future Hearing**	Click Here to go back to Process Inventory Tab
Process Description:		
Status:	**Ready for Testing**	
Result:	**Ready for Testing**	
Person Approved Testing:		

Detail Information

Step	Description	Comments
1	Click on Find > Case > Case Manager > Enter Case Number or Party Info	
2	Navigate to the **Hearings** Tab	
3	Right-click the **Hearing** and select **Cancel.** The **Cancel Hearing** box appears.	
4	Select the **Reason** code from the dropdown list.	
5	Enter a **Comment** (Optional)	
6	Click **Save.**	

Summary Information		
Process Name:	**Add Cross Reference Number**	Click Here to go back to Process Inventory Tab
Process Description:		
Status:	**Ready for Testing**	
Result:	**Ready for Testing**	
Person Approved Testing:		

Detail Information

Step	Description	Comments
1	Select "**Find"** in the menu bar	PRO-19 RELATED CASES look for cross ref when in odyssey
2	Select "**Case"**	
3	Select "**Case Manager"**	
4	If you have the case number, enter it in the Case Number Field and press enter or **"Search"** in the command legend.	
	If you have party's name, select the radio button that applies, "**type of party (Person, Nickname or Business)**" and	
5	Hit "**Enter" (keyboard)** or **"Search"** in command legend	
6	Click correct case number if case doesnt automatically come up.	
7	Click on "**Details"** tab	
8	Click on (+) icon in '**Case Cross Reference Numbers'** section	
	Enter the case number in the **Number** field	
	Select the **Type** from the drop down list	CAN NOT PROCEED - Not all Cross reference types are configured only APPELLATE, BANKRUPTCY AND MICROFILM NUMBER. Need "Judges order".
11	Click "**Continue**"	
12	The case will now appear in the **Case Cross Reference numbers** section.	
	NOTE: If for some reason the incorrect case was added, then right click in the area of the case (area will turn a grey color) and select Delete. Begin on Step 7, to enter the correct case number.	
13	Click "**Save"** in the command legend	

Summary Information		
Process Name:	**Consolidation of Cases**	Click Here to go back to Process Inventory Tab
Process Description:		
Status:	**Ready for Testing**	
Result:	**Ready for Testing**	
Person Approved Testing:		

Detail Information		
Step	**Description**	**Comments**
1	Select "**Find**"	Same as PRO-19 for Related Cases
2	Select **Case:** Search screen will appear	
3	Select Case Manager	
3	Enter case number or name	
4	Click on "**Enter**" button or **Search** (botton right of screen)	
5	Click correct case number if case doesnt automatically come up.	
6	Click on "**Details**" tab	
7	Click on plus sign (+) in **Related Cases** section	
8	Enter the Case number you wish to relate. **Note:** If you do not know the number, click on search symbol and enter your search criteria to look for the case. Once the case is located, select the case.	
10	Click the **Reason** from the drop down, select **Consolidated** as a reason.	
11	Click on **Continue**.	
12	The case will now appear in the Related Case section. **NOTE:** If for some reason the incorrect case was added, then right click in the area of the related case (area will turn a grey color) and select Delete. Begin on Step 7, to enter the correct case number.	
13	Click on **Save**	

Summary Information		
Process Name:	**Motions/Events and Event Relationships**	Click Here to go back to Process Inventory Tab
Process Description:		
Status:	**Ready for Testing**	
Result:	**Ready for Testing**	
Person Approved Testing:		

Detail Information		
Step	**Description**	**Comments**
	Click the **Events tab**	
1		
2	Click the **(+) Add** icon.	
3	Enter the **Event Type**, by using one of the following methods: Type the **code word** shortcut for the event, or Utilize the drop down and start typing; the drop down will scroll down based on the letters typed, or With your curser in the Type field, hit the **F4** button to pull up the **Select Codes dialog box**. Search for event by description. Once you see the event you wish to add, click on it.	
4	Verify the **Date** and modify if needed	
5	Enter the **Party** filing the document. (Optional)	
6	Enter the **party** who the document was filed against in the Party 2 field. (Optional)	
7	Enter the **Judicial Officer**. (Optional)	
8	Enter the **Due date**. (Optional)	
9	Enter the **Completed date**. (Optional)	
10	Enter any necessary **Comment**.	
11	**The Docketable and Include on Appeal checkboxes** should default (based on configuration for that Event).	
12	Click the **Save** (ALT+S).	
	Adding Multiple Events	
1	Click the **(+)** on the **Events tab** to add an Event.	
	Fill out the required information for the **Event Type.**	
2	Click the **Add Nex**t (ALT+N) button to add another event.	
	NOTE: Clicking the Add Next button does not automatically save the current event to the case. As you continue to ad	
3	Continue to add as many events as needed by clicking the Add Next (ALT+N) button.	
4	Click the **Save** (ALT+S) button to save all events.	
5	If you click the **Exit** (ALT+X) button, you will be given a warning advising that if you exit changes will not be saved. If	
	Modify an Event	
1	Click on the **event** you wish to modify.	
	The **Modify Event** dialog box appears.	
2	Make any needed modifications.	
3	Click **Save** (ALT+S) button	

Related Events

With all the events on a case it may become very difficult to remember what Order goes with what Action or Affidavit. Related Events can GROUP them together in a Parent-Child relationship

1 When adding a new event, after you finish entering your event information, select **Add Related** from **Quick links**.
A warning message appears advising changes must be saved and asking if you wish to continue. Click yes.
2 The **Add Event dialog box** appears for you to add your related event.
If from an existing event, right-click the Event and select **Add Related Event**
3 The **Add Event dialog box** appears.
4 Enter the event information
5 Click **SAVE**

Modify Event Relationships

1 You may have events that need to be related but are not
2 Right-click the Event and select **Modify Event Relationships**
The **modify event relationships dialog** displays.
The event in which you selected in the previous step will be highlighted in the **SELECTED EVENTS section** as well as in the **events display** at the bottom of the dialog.
The highlighted color will allow you to recall which event you originally selected that you will be relating the other event to.
3 You may narrow the search results by utilizing the **EVENT SELECTION** criteria.
4 Click the **CHILD** or **PARENT checkbox** for the event you wish
5 Click **SAVE**

Deleting a Relationship

1 Right-click on the event to remove the relationship and select **Modify Event Relationships**.
2 **Uncheck** the **CHILD relationship**
3 Click **SAVE**

Summary Information		
Process Name:	**Appeal SPC to Civil Superior court**	Click Here to go back to Process Inventory Tab
Process Description:		
Status:	**Ready for Testing**	
Result:	**Ready for Testing**	
Person Approved Testing:		

Detail Information

Step	Description	Comments
1	Select Find from the Menu bar.	
2	Select Case.	
3	Select Case Manager.	
4	Enter the case number in the case number field.	
5	Press Enter (keyboard) or click Search in the command legend.	
6	Verify case number matches document.	
7	Click on the Appeals tab.	
8	Click on the appeal you want to edit and the Edit an Appeal dialog box will appear.	
9	Make any needed modifications.	
10	Click Save.	

Summary Information	
Process Name:	**Assigning a judicial official to a case**
Process Description:	**How to assign a judicial official to a specific case**
Status:	**Ready for Testing**
Result:	**Ready for Testing**
Person Approved Testing:	

Click Here to go back to Process Inventory Tab

Detail Information

Step	Description	Comments
1	After you have searched and found your case you will click on the '**Details**' Tab	
2	From the **Case Assignment blue bar** click on the plus sign **(+)** or **Potential Assignee List** link	
3	select "**By assignment**", "**By assignee**" or "**By pool**"	
4	Select the **Assignment** from the drop down box	
5	Select the **Assignee** from the drop down box, choose "**Assignee**" or "**Judicial Officer**"	
6	Add **Comment** if desired	
7	Click **Continue**	

Summary Information		
Process Name:	**Delete/Modify/View Judgment**	Click Here to go back to Process Inventory Tab
Process Description:		
Status:	**Ready for Testing**	
Result:	**Ready for Testing**	
Person Approved Testing:		

Detail Information		
Step	**Description**	**Comments**
	Delete a Judgment Event	
	With appropriate rights, a judgment event can be deleted to remove it from normal view	
1	Click the **Judgment** link on the **Disposition** tab to access the **View Judgment History** dialog box.	
2	Right-click the event you wish to remove and select **Delete**.	
3	Click **Save**.	
	Undelete a Judgment Event	
	Undeleting a judgment event restores the judgment to normal view.	
1	Click the **Judgment link** on the **Disposition tab** to access the **View Judgment History** dialog box.	
2	Check the **"Show Deleted Items"** box.	
3	Right-click the event you wish to restore and select **Undelete**.	
4	Click **Save**.	
	View Judgment Event Details	
1	Click the **Judgment link** on the **Disposition tab** to access the **View Judgment History** dialog box.	
2	Click the judgment event you want to view in detail, as though you were going to modify the event.	
3	The **Modify Judgment** dialog box appears.	
4	You can view the event details from here and make any changes.	
	Click **Save**	

Summary Information		
Process Name:	**Add A Court Session**	[Click Here to go back to Process Inventory Tab]
Process Description:		
Status:	**Failed**	
Result:	**IN PROGRESS**	
Person Approved Testing:		

Detail Information

Step	Description	Comments
	From the **Menu**, click **Tools** > **Scheduling**> **View Calendar** > **Case Manager**	
1	From the **Calendar view**, click the icon to add a new session.	
2	In the **Add Court Session Dialog Box**, **Session Details** section:	
3	Enter the **Session Name** - ex: Involuntary Commitment Hearing	
	Click the **Recur icon** if the hearing are recurring and enter desired information. See instructions on Recurring session after step 29 below.	
4	Enter **Start/End Date and Times**	
5	**Click picker icon to add the Case Category**	
6	Click the icon to choose the **Hearing Group(s)**	
7	Click the icon to select the **Hearing Type(s)**	
8	Click the icon to select **Resources**	Should Resourced include the court location? The hospital or courtroom?
9	Select the **Session Type** from the session type drop down box (Optional)	
10	Check the Display **Defendant Count** checkbox if you would like the system to keep track of and display the number of d	Not Applicable
11	Check the **Display Additional Offense** Info checkbox	Not Applicable
12	Allow **Online Scheduling** – If your court is using this feature, click this box to allow online scheduling into this session. I	Not Applicable
13	Check the **Ignore Conflict Checking** for this Session box if desired	
14	Check the **Display Requested Duration** box if desired	
15	**Maximum Hearings per Attorney** - Enter the maximum number of hearings a lead attorney can have for this session. (	
16	**Multiple Hearings for Same Case** - choose what to do if you were to have multiple hearings for the same case added to this session.	
17	**Session Comment**s – Enter any comments in the Comment field. (Optional)	
18	**Capacity Details section,** allows you to configure the number of hearings that can be scheduled, as well as, how they ca	
19	Select the **Hearing Start At** from the drop down arrow	
	Same Time - This is a session where all parties are requested to report at the same time and are called on a first-come first-serve basis, or according to the court's practices.	
	Regular Intervals - This option directs parties to report at the various intervals rather than at the beginning of the se	
	Different Times - This option gives staff complete control over when a hearing will be scheduled and the duration n	
20	**Limit Based On**	
	Quantity - Specify the total # of hearings to allow for the session.	
	Regular Interval - Enter the number of minutes per interval.	
	Duration - No further data entry is required in this section	
21	**Quantity and/or Duration** - specify the total # of hearings that you want to allow for the session. The # of hearings spe	
22	**Overbook Limit** - Allows you to schedule that amount over the set number.	
23	**Sort Order** - How do you want the hearings sorted	
24	**Online Limit** – If your court is using online scheduling, a limit for hearings scheduled online can be set.	
25	**Ignore Duplicate Cases**: - All hearings on a single case will be counted as one hearing for the purposes of the capacity limits.	
26	**Ignore Duplicate Defendants**: - selecting this option will count all hearings for a single defendant as one for the purposes of the capacity limits.	
27	**Allow Close Prior to Capacity** - If selected, users may close the Court Session at any time regardless of total capacity.	
28	**Hearing Limits** – Click the plus sign to add limits by hearing type that can be scheduled through the **online portal, in Odyssey, or both.**	
29	Click **Save** to save the new session to the calendar.	
	Recurring Sessions	
1	Click the **Recur icon** to access the Add Recurrence dialog box.	
2	Complete the **How often does this court session recur**? section.	
3	Complete the **When does this recurrence start and end**? Section. You can limit this recurrence by the number of times it should appear in the calendar, or by adding an end date.	
4	Click **Continue** (Alt+C).	
5	**Save** your session.	
	Modify Court Session	
1	Click the **Court Session** on the calendar. (Or right-click over the session name and choose Modify Court Session. Skip Step 2.)	
2	Click the **Court Session link** listed at the top of the Court Session page.	
3	The **Modify Court Session dialog box** is displayed.	
4a	If the session contains a hearing, you are only able to modify:	
	The **Session Name**	
	The type of **Case Categories** that can be scheduled in the session	
	The **time** of the session	
	The **type of hearings** scheduled in the session	
4b	If no hearings have been scheduled in the session, you can modify any of the information.	

Summary Information		
Process Name:	**Transfer Case**	Click Here to go back to Process Inventory Tab
Process Description:		
Status:	**Ready for Testing**	
Result:	**Ready for Testing**	
Person Approved Testing:		

Detail Information

Step	Description	Comments
	ensure all events, judgments and case disposition information is entered prior to transferring the case.	
1	Select **Find** from the Menu bar.	
2	Select **Case**.	
3	Select **Case Manager**.	
4	Enter the case number in the case number field	
5	Press "**Enter**" (keyboard) or click "**Search**" in the command legend.	
6	Verify case number matches document.	
7	Click on the "**Events**" Case Tab.	
8	Click on the plus **"(+)"** sign to open the Add Event dialog box.	
9	In the Type dropdown box select **Transfer**.	
10	Enter the **Date**	
11	Uncheck the **Docketable** checkbox	
12	Click **Save**	
13	Click **Create Task** from the bottom right command legend	
14	Click **Task**	
15	Uncheck **Filter Queues by case node**. This will return all counties.	
15.1	for inter county transfer, select the division you wish to transfer the case, i.e. SPC to CR.	
15.2	for out of county transfer, Select SPC "County Name" Transfer. This is the name of the county that the case is being transferred to.	
16	Click **Attach Documents.**	
17	Select and Attach all documents in the file.	
18	Click **Save**	
19	Click **Send**	
20	Click Save in the bottom right command legend to save the case.	

Summary Information		
Process Name:	**Assign Judicial Official to Case**	Click Here to go back to Process Inventory Tab
Process Description:		
Status:	**Ready for Testing**	
Result:	**Ready for Testing**	
Person Approved Testing:	**Sharon Horace**	

Detail Information

Step	Description	Comments
1	Select Find from the Menu bar.	
2	Select Case.	
3	Select Case Manager.	
4	Enter the case number in the case number field.	
5	Press Enter (keyboard) or click Search on the command legend.	
6	Verify case number matches document.	
7	Click on the Details tab.	
8	From the Case Assignment blue bar click on the plus (+) sign.	
9	In the Reassign Case dialog box, from the New Judge dropdown box slect the judicial officer you want to assign.	
10	From the Reason dropdown box, select 'Initial Assignment'.	
11	Click Continue.	

Summary Information		
Process Name:	**Change of Venue**	[Click Here to go back to Process Inventory Tab]
Process Description:		
Status:	**Ready for Testing**	
Result:	**Ready for Testing**	
Person Approved Testing:		

Detail Information		
	Description	**Comments**
1	Click "Find" in the menu bar	
2	Select "Case"	
3	Select "Case Manager"	
4	To search by case number, enter the case number in the Case Number Field and press enter or "Search" in the	
4.1	To search by party name, select the type of party (Person, Nickname or Business), and enter the information in the	
4.2	If multiple cases are retrieved, click on the desired case number to display the case summary.	
NOTE:	**All events, documents, etc. should be attached to the case <u>before</u> the transfer is initiated.**	
4.3	If a Motion to Change Venue or other motion needs to be added as an event, see Pro-2 for steps to add an event.	
4.4	If a Motion to Change Venue or other motion needs to be attached/scanned to the case, see Pro-13 and Pro-23 for	
5	Once the case is ready to be reassigned, click on the "Detail" tab	
6	Click "Reassign" (right of "Case Assignment")	
7	The "Reassign Case" menu will open	
8	Confirm the case number is correct in the "Case Number" field	
8.1	If assigning to a new county, the case number field will say "System Assigned" after the new county is selected (Step	
8.2	If assigning to a court/location in the same county, the existing case number will display in the "Case Number" field.	
9	Click the icon to the right of the "New Court" field to select the new county/court	
10	Locate the court/county where the case will be transferred and double click on the desired county/court	
11	The selected county/court will display in the "New Court" field	
12	Click the drop down button to select a judge in the "New Judge" field if applicable	
13	Check the "Create Notice for Judicial Official" checkbox if a notice should be sent to the judge	
14	Add a transfer date in the "Date Transferred" field	
15	Select a transfer reason in the "Reason" field	
16	Add a comment as applicable in the "Comment" field	
17	Select "Continue"	
18	The "Case Assignment" details will update with the new court/county assignment listed on the "Detail" tab	
18.1	The case number (upper left) will upate to display "No Number Set" until the new case number is generated	
18.2	Cases assigned to another county will receive a new file number for that county	
18.3	Click on "Case Assignment" on the "Detail" tab to view the history of assignments/transfers	
19.2	*Provide the new file number to the receiving county*	
19.3	Can also create a task and assign the new file to the new county - see Pro-27 for steps to creating/assinging a task.	
20	Click "Save" in the Command Legend.	
21	Once "Save" is selected, case screen will close	
21.1	A search on the old case number (when the case is transferred to another county) will retrive the new case	
21.2	Provide the new file number to the receiving county or assign the new case to the receiving county via Tasks. See Pro-	

Summary Information		
Process Name:	**Response/Answer/Motion to Extend Time**	Click Here to go back to Process Inventory Tab
Process Description:		
Status:	**Ready for Testing**	
Result:	**Ready for Testing**	
Person Approved Testing:		

Detail Information

Step	Description	Comments
1	Select **"Find"** from the Menu bar	
2	Select**"Case"**	
3	Select**"Case Manager"**	
4	Enter the case number in the case number field.	
5	Press **"Enter"** (keyboard) or click **"Search"** on the command legend.	
6	Verify case number matches document.	
7	Click on the**"Events"** tab.	
8	Click on the plus **(+)** sign to open the Add Event dialog box.	
9	Enter event code or use the drop down to select the desired event type. Verify the event date in the Date field and modify if needed.	
10	If event code is not known, click on the (F4) key and enter your search word in the**"Description Box".** Next, click on Search and select the event	
11	When the event type is populated in the field, click **"Save"**	
12	Click **"Save"** at the bottom right hand corner	

Summary Information		
Process Name:	**Findings and Custody Order**	Click Here to go back to Process Inventory Tab
Process Description:		
Status:	**Ready for Testing**	
Result:	**Ready for Testing**	
Person Approved Testing:		

Detail Information

Step	Description	Comments
1	Select **"Find"** from the Menu bar	
2	Select "**Case"**	
3	Select "**Case Manager**"	
4	Enter the case number in the case number field	
5	Press "**Enter**" (keyboard) or click **"Search" (Alt+S)**	
6	Verify case number in Odyssey matches that of the document	
7	Click on the **"Events"** Tab	
8	Click on the plus **"(+)"** sign	
9	Enter code event code or use drop down to select the desired event type.	
10	If the you don't know the code or the name of the event type, Click on the **(F4) key** and enter your search word in the	
11	Once the event type is populated in the field, click Save.	
12	Right click on the Event and select **"Scan Document"**.	

Summary Information		
Process Name:	**Transfer Case to Another County**	Click Here to go back to Process Inventory Tab
Process Description:	**see PRO 47 change of venue**	
Status:	**Ready for Testing**	
Result:	**Ready for Testing**	
Person Approved Testing:		

Detail Information		
Step	**Description**	**Comments**
	see PRO 47 change of venue	

Summary Information		
Process Name:	**Service**	Click Here to go back to Process Inventory Tab
Process Description:		
Status:	**Ready for Testing**	
Result:	**Ready for Testing**	
Person Approved Testing:		

Detail Information

Step	Description	Comments
	Add Service Events	
	Service events (used to track service) are added as related events from the **Events tab** of the case record and maintained from the **Service tab**	
1	Add an **Event,** click the add icon **"+"** in the **Event Tab**.	
2	Click the **Type** drop down box and choose the correct **service type** ie. Notice of Hearing.	
3	Click the **Add Service hyperlink** in the **Quick Links**	
4	The **Add Service Detail** dialog box appears	
5	Click the **Type** drop down box	
6	Select the **Service form** by clicking the **Search icon**.	
7	Enter the **Issue Date** and **Time**	
8	Enter the **Volume**, **page**, and **# pages**	
9	Add **Comments** if desired	
10	Add the parties to be served.	
11	To add parties click the add icon **"+"** under **ISSUED TO** (bottom of dialog box).	
12	Select the case parties to issue the service event for in the **Select the Issued to Party** dialog box.	
13	Click **Continue**.	
14	Select the A**nticipated Method** and the **Anticipated Server** from the drop-down boxes.	
	You can also Search for the Anticipated Servers by clicking the **Search icon**.	
	You can choose from Local Servers and Non-Local Servers by selecting the appropriate value in the view drop down b	
15	The **envelope icon** located to the left of the party's name will act as a visual indicator about the party's address.	
	Pink - no current address for this party in the system.	
	White - is a current address for this party in the system.	
16	Click **Save**.	
	The **Service Icon** displays on the **Event** (If in related view, it will show in red under the event. If in chronological view, it will show as a red S to the right of the event.).	
	Modify a Service Event	
1	To Modify a Service, click on the **Service Tab** of the Case.	
2	Click on the **Type** of service to be served. It should be underlined (ex: summons, subpoena, etc.).	
3	The **Modify Service Detail** dialog box appears.	
4	Make any necessary changes.	
5	Click **Save**.	
	Service Forms and Fees	
1	Print the Service Form	
2	Click the **Forms** button	
	A Warning dialog box may appear advising you that changes must be saved before printing a form. Click Yes.	
3	Ensure the **print preview checkbox** is checked	
4	Choose your form	
5	Answer any prompts that appear	
6	Make any corrections to the form	
7	To print the form, click on the **Print** option (bottom right).	
8	**Release holds** on service fees placed at time of assessment of fees.	
9	Click the **Financial tab**.	
10	Click on the **Court Costs** link for the party that is assessed service fees.	
11	Click on the **Edit Detail** link and find the "service" fees that have a hold checkbox checked.	
12	Uncheck the **hold checkbox**.	
13	Click the **Save** button (ALT+S)	
	Enter Service/Return Information on a Service	
1	Click the **"Service"** tab of the case	
2	Click the name hyperlink of the person whose service you want to update.	
3	The **Modify Service Tracking** dialog box appears	
4	Click the calendar next to the **Service Date** and select the appropriate service date. (This is the date that the party received the document.)	
5	Click the calendar next to the **Return Date** and select the appropriate file stamp date. (The date the service was returned and file stamped at the Clerk's Office.)	
6	Enter any additional information that you have, or that your office tracks.	
7	Click **"Save".**	
8	The Service will now show as **SERVED** with the date next to it.	
9	Click the **Events tab**, you will notice there is now a **green "S"** to the far right of event (if in chronological view). The **green "S"** means the citation/notice/writ has been served.	
	Note: If you are in the **"Related Events View"** you will not be able to see the **green "S"** instead the service will display in **green font**.	

Summary Information		
Process Name:	**Delete a Case**	Click Here to go back to Process Inventory Tab
Process Description:		
Status:	**Ready for Testing**	
Result:	**Ready for Testing**	
Person Approved Testing:		

Detail Information

Step	**Description**	**Comments**
1	Select "Tools" from the Menu bar	
2	Click "Case" > "Administration" > "Delete a Case" > "Case Manager"	
3	The case search screen will display	
4	To search by case number, enter the case number in the Case Number Field and press enter or "Search" in the	
4.1	To search by party name, select the type of party (Person, Nickname or Business), and enter the information in the	
4.2	If multiple cases are retrieved, click on the desired case number to display the "Delete" dialog menu	
5	The "Confirm Delete Case" menu displays	
6	Add comments as appropriate in the "Comment" field	
6.1	Any message/warnings related to the status of the case will display at the bottom of the box. Based on the message	
7	Click "Delete"	
8	The case search screen will display. A search on the deleted case will not retrieve any results.	

Summary Information		
Process Name:	**Add Disposition/Judgment (Firearms Component)**	Click Here to go back to Process Inventory Tab
Process Description:	**FIREARMS JUDGMENT COMPONENT**	
Status:	**Waiting for PDD**	
Result:	**Waiting for PDD**	
Person Approved Testing:		

Detail Information

Step	Description	Comments
1	From the **Disposition** Tab, click the **Judgment** Hyperlink.	
2	The **Add Judgment dialog** box appears.	
3	Select the **Type of judgment** by clicking the drop-down arrow.	
4	Enter the judgment Date.	
5	Select the **Judge** (judicial officer) who ordered the judgment.	
	**Judge will default to judicial officer assigned to the case. If it is different, select the judge using the dropdown arrow.*	
6	Select **Does not affect aging clock**.	
7	Click the **Add** button or click the **Judgment picker icon** to add a Judgment	
8	Check the **NICS Firearms Restriction** checkbox	
	**Select the components in the order you want them to display.*	
9	Click the **Continue** (ALT+C) button.	
10	Click **Continue** then click **Add**.	
	The NICS Judgment Component displays.	
	Details of NICS Firearms Restriction	
11	User will not take any action for the Originating Agency Identification Number Field -- (Per 4720 -- The ORI field will	
12	Enter correct **Originating county Location** by selecting from dropdown selection of all counties	User is unable to type county name -- must use dropdown
13	Enter **Adjudicating or Hearing Location** by selecting from dropdown selection of all counties	User is unable to type county name -- must use dropdown
14	Original Agency Case Number will be prepopulated field with the Case number	
15	**Subject Information Fields** -- Subject Information will be prepopulated with Party Name, DOB and SSN of	
16	User should confirm party data or use picker icon to select party	
17	**Restriction Information Fields:**	
18	(Per 4720 -- Denying Agency field will not be displayed and will be hidden.)	
19	User will not take any action for the Category of Prohibited Person field -- (Per 4720 this field will default to	
20	The following fields are not applicable and disabled: State Prohibited Category, State Statute and Subsection,	
21	(Per 4720 -- the box for "The delection of this NICS Index is record due to the operation of the NIAA" will not be	
22	User can add comments if applicable	
23	Click **Save**.	
24	The disposition displays.	
25	**Save** the Case	

Summary Information		
Process Name:	**Filing Confidential Documents**	Click Here to go back to Process Inventory Tab
Process Description:		
Status:	**Ready for Testing**	
Result:	**Ready for Testing**	
Person Approved Testing:		

Detail Information

Step	Description	Comments
	Filing Confidential Documents	
Step #	**Instructions**	
	*Mandatory Fields	
1	Select "Find" from the Menu Bar	
2	Select "Case"	
3	Select “Case Manager” (if necessary)	
4	If you have the case number, enter it in the Case Number Field and press enter or "Search"	
5	If you have party's name, select the radio button that applies, "type of party (Person, Nickname or Business)" and en	
6	Press "Enter" key (keyboard) or click "Search" (Alt+S)	
7	Open the case by clicking the case number.	
8	Click the “Events Tab”.	
9	Click the “Plus + sign” to add an Event	
10	Select “Sealed Document” from the “Type” drop down.	
11	Enter the Date the document was filed.	
12	Select “Filed By” using the “Picker Icon”.	
13	Select “Against” using the “Picker Icon”.	
14	Enter Comments if necessary.	
15	Complete any other fields if necessary.	
16	Click “Save”.	
17	Right Click on the Event.	
18	Select “Attach” or “Scan” Document.	
19	Select “Type” as “Other”.	
20	Select “Security Group” as “Confidential”.	
21	Type a Description if necessary.	
22	Enter the “Effective Date” (filing date).	
23	Click “Attach” or “Scan” and add the document.	
24	Click “Save” to save the case.	
	Filing Appellate Record Confidential Documents	
Step #		
1	Click the "Appeals" tab	
2	Click the (+) icon in the blue section bar	
3	From the "Add an Appeal" dialog box, select "Appellate Record" from the "Type" drop down box	
4	Click the (+) icon in the blue section bar	
5	Select the checkbox for the documents to be included in the appeal	
6	Click the "Continue" button	
7	The selected documents will now appear in the dialog box	
8	To reorder the documents, enter the order number in the order field and select the "Reorder” hyperlink	
9	Click the "Build Index" button	
10	The appellate record will display as "Preliminary Record Built-Pending Review/Final Build"	
11	To review and build the final record or edit the record, left click on the appellate record.	
12	From the "Edit and Appeal" dialog box, select the "New Index" button to make changes to the record, or select the "Build Record" button to build the final record.	
13	The appellate record will now appear under the "Appeals" tab and the "Documents" tab	
	To Certify the Appellate Record:	
1	Navigate to the "Appeals" tab	
2	Right click on the appellate record	
3	Select "Add Certification Date"	
4	From the "Add Certification" dialog box, enter the certification date in the "Certification Date" field	
5	Click the "Save" button	
	To Print the Appellate Record:	
	Option 1: Navigate to the "Documents" tab	
1	Right click on the "Appellate Record"	
2	Select "Print"	
	Option 2: Navigate to the "Appeals" tab	
1	Click on the PDF icon of the Appellate Record	
2	The document viewer will appear	
3	Select the Print Icon	