Virginia Department of Juvenile Justice

BADGE

Balanced Approach Data Gathering Environment

Caseload Management Module Manual

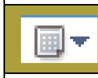
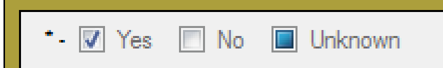
Table of Contents

Key/Legend

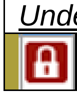
The BADGE application and the manuals use various styles and icons. Below are their explanations. The **BADGE Application** covers all BADGE modules while the **BADGE Module** covers this specific module.

Individual users may not have read or write privileges for every module; therefore, you may not be able to add, edit, or delete certain information in BADGE.

BADGE Application

Style/Symbol	Meaning
 Calendar Screen Icon	In order to select a date, click the Calendar Screen Icon and select the date.
 Printer Icon	In order to print a report or document, click the Printer Icon in the *<u>Report Viewer</u>* screen.
 Questions with an asterik (*) next to it follow the legend above.	If the question's response is "Yes", click the associated checkbox. If the question's response is "No", the associated checkbox needs to be empty. If the question's response is "Unknown", the associated check needs to be *blue*.
 Save Icon	In order to export and save a document, (i) click the Save Icon, and a drop-down menu will appear, (ii) select the format for the document, (iii) select the location of where you would like to save the document, and (iv) click the **Save** button.
 Scroll Bar	A scroll bar allows the user the move the window viewing area up, down, left, or right. The scroll bar can be vertical or horizontal and is commonly located on the far right or bottom of the window.
Show All Facilities (including expired ones) Checkbox	Click the **Show All Facilities (including expired ones)** checkbox in order to view and update records for the facilities the user was previously assigned to.

BADGE Module

Style/Symbol	Meaning
Bolded	Name of a function, key, button, or option.
<u>Hyperlink</u>	Press the Ctrl key and click the hyperlink in order to be transferred to another document or a specific topic within the same document for more information.
Italicized	Name of a tab.
 Notepad Bullet	Tips and notes provide additional information, exceptions, or special circumstances that apply to a particular topic or area in BADGE.
 Reference Bullet	Refer to another page or resource for additional information.
<u>Underlined and Italicized</u>	Name of a screen.
	Denotes a locked item or record that cannot be changed.

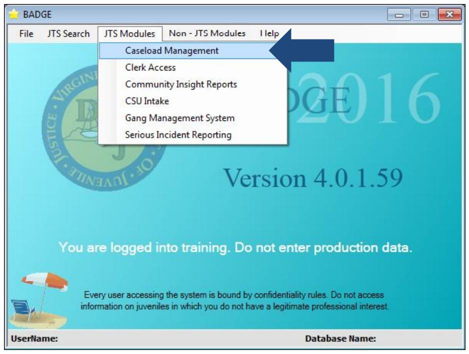
The BADGE manuals are instructional guides for users to understand how to use BADGE. The BADGE manuals will apply the same formatting but individual information. This manual addresses the BADGE Caseload Management module.

Updates to the manuals are made frequently and uploaded to DJJ's website without any notification. For this reason, it is recommended that you access the manuals solely through the website instead of downloading and printing them to ensure that you have the most up-to-date version.

Caseload Management Module

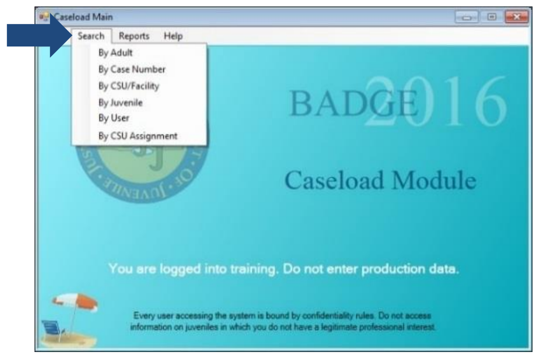
From the *BADGE* home screen:

1. (i) Click the **JTS Modules** menu, (ii) select the **Caseload Management** option from the drop-down menu, and the *Caseload Main* screen will appear.

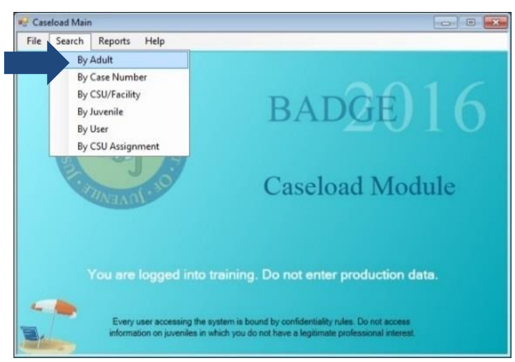


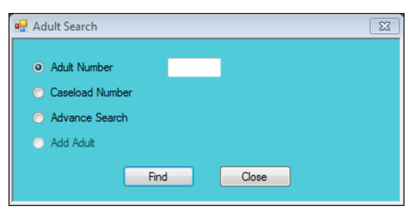
Search

There are various methods to search for an existing caseload. From the *Caseload Main* screen, click the **Search** menu.



1. **By Adult**
   a. (i) Select the **By Adult** option from the drop-down menu, and the *Adult Search* screen will appear, (ii) search for an adult, (iii) click **Find**, and the *Search Results* screen will appear, (iv) select the adult's name, and the row will be highlighted in *blue*, (v) click the **Select** button, and the *Caseload Details* screen will appear.

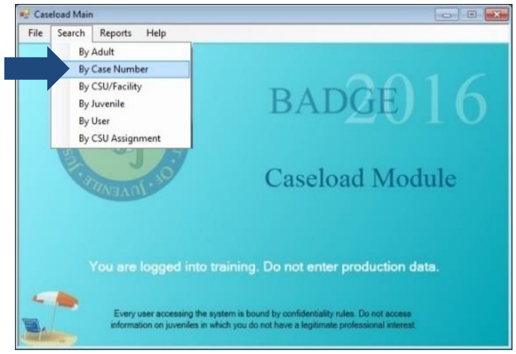


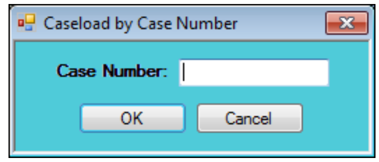


- Refer to the Login & Search User Manual on how to search for an adult.
- Refer to the Caseload Details section on how to navigate the *Caseload Details* screen.

2. **By Case Number**
   a. (i) Select the **By Case Number** option from the drop-down menu, and the *Caseload by Case Number* screen will appear, (ii) type the **Case Number**, and the *Caseload Details* screen will appear.

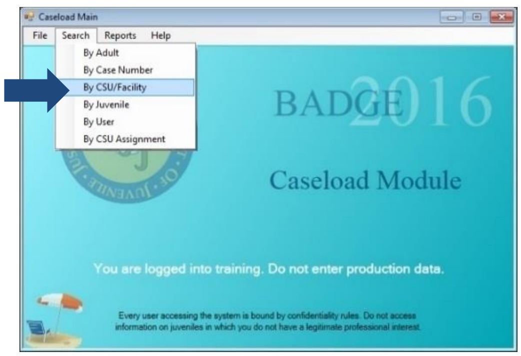
The **Case Number** is NOT the same as the **Juvenile Number**.

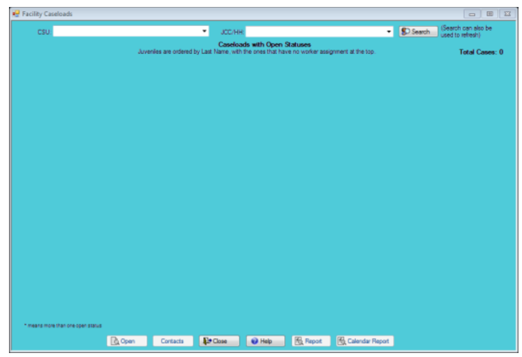




- Refer to the Caseload Details section on how to navigate the *Caseload Details* screen.

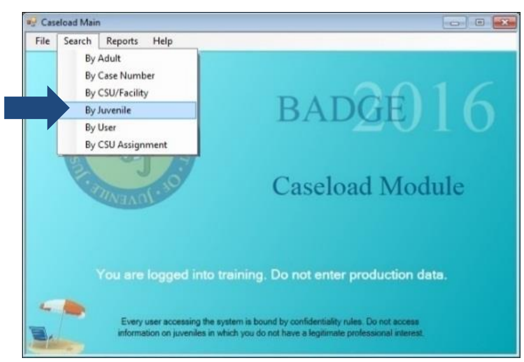
3. **By CSU/Facility**
   a. (i) Select the **By CSU/Facility** option from the drop-down menu, and the *Facility Caseloads* screen will appear, (ii) select the **CSU** or **JCC/HH** from the drop-down menu, (iii) click the **Search** menu, and the **Caseloads with Open Statuses** will be listed, (iv) select the juvenile's name, and the row will be highlighted in *blue*, (v) click the **Open** button, and the *Caseload Details* screen will appear.

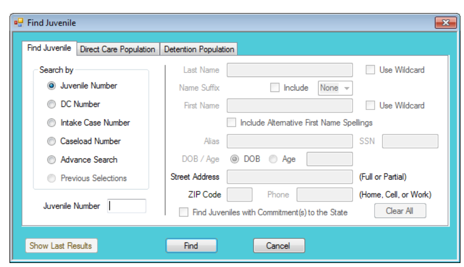




- Refer to the Caseload Details section on how to navigate the *Caseload Details* screen.

4. **By Juvenile**
   a. (i) Select the **By Juvenile** option from the drop-down menu, and the *Find Juvenile* screen will appear, (ii) search for a juvenile, (iii) click **Find**, and the *Search Results* screen will appear, (iv) select the juvenile's name, and the row with be highlighted in *blue*, (v) click the **Select** button, and the *Caseload Details* screen will appear.



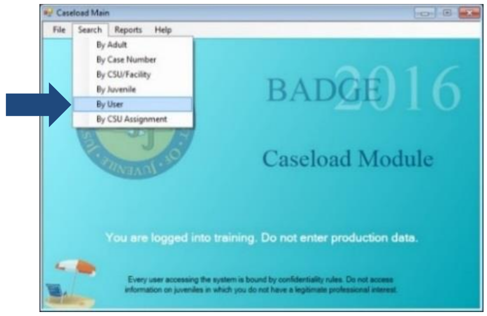


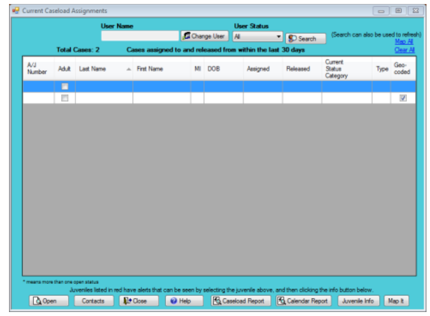
- Refer to the Login & Search User Manual on how to search for a juvenile.
- Refer to the Caseload Details section on how to navigate the *Caseload Details* screen.

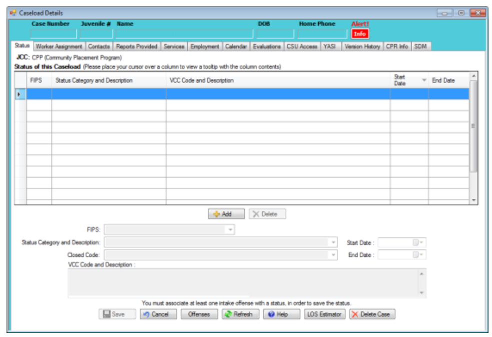
5. **By User**
   a. Select the **By User** option from the drop-down menu and the *Current Caseload Assignments* screen will appear.
      i. In order to filter the listed cases, (i) select an option from the **User Status** drop-down menu, (ii) click the **Search** button, and the filtered results will appear.

- The **User Name** will default to your name.
- The cases that are listed have been assigned to and released from your caseload within the last 30 days.

ii. (i) Select a caseload, and the row will be highlighted in *blue*, (ii) click the **Open** button, and the *Caseload Details* screen will appear.



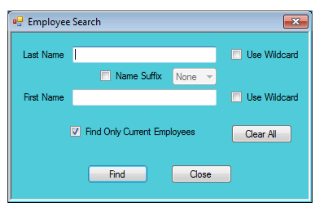




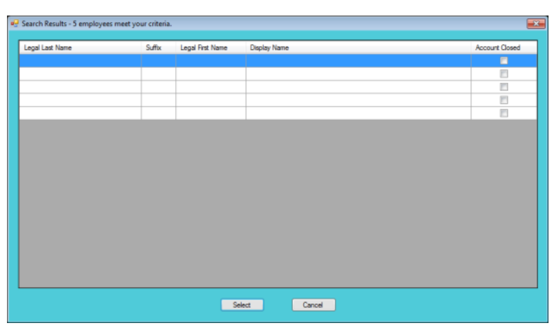
iii. **Change User Button**

1. (i) Click the **Change User** button to search for another worker's caseload and (ii) enter the appropriate search criteria in the *Employee Search* screen.

- In order to yield broader search results, type ONLY two or three characters of the last and first name, and select **Use Wildcard**.



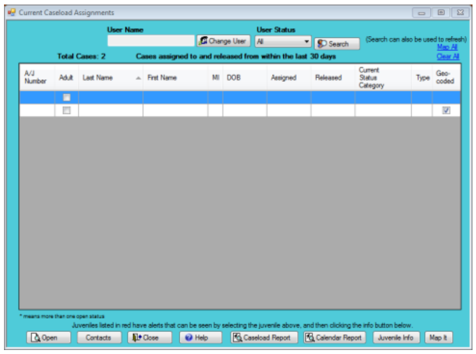
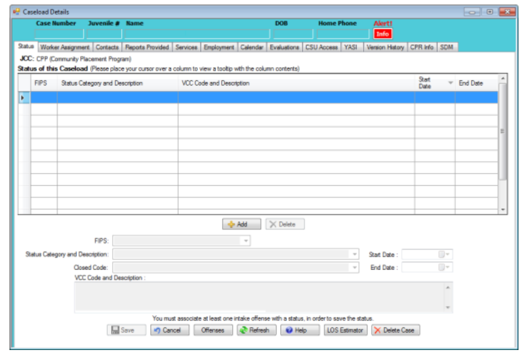
a. Type the **Last Name**.
b. Click the **Use Wildcard** checkbox and the employee search will match any character or sequence of characters that you put in the **Last Name** field.
c. Click the **Name Suffix** checkbox in order to select a suffix from the drop-down menu.
d. Type the **First Name**.
e. Click the **Use Wildcard** checkbox and the employee search will match any character or sequence of characters that you put in the **First Name** field.
f. The **Find Only Current Employees** checkbox will be selected automatically. If you would like to include former employees in your search results, uncheck this checkbox.
g. Click the **Find** button and the *Search Results* screen will appear.



h. (i) Select an employee's name, and the row will be highlighted in *blue*, (ii) click the **Select** button, and the *Current Caseload Assignments* screen will appear.

   i. In order to filter the listed cases, (i) select an option from the **User Status** drop-down menu, (ii) click the **Search** button, and the filtered results will appear.

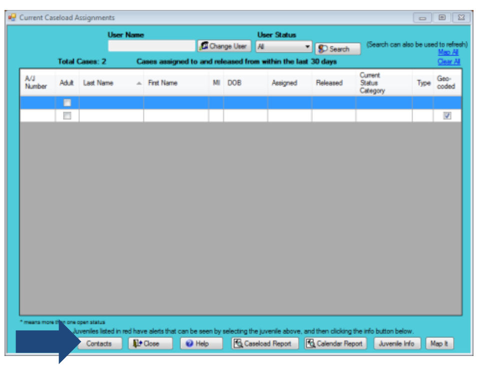
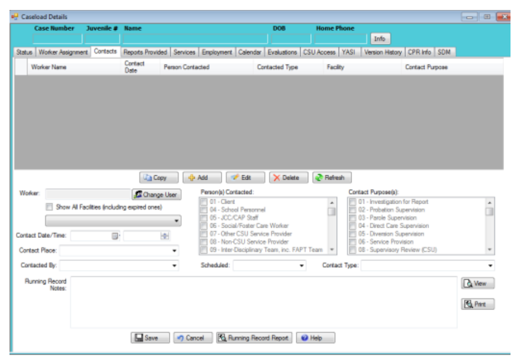
i. (i) Select a juvenile's name, and the row will be highlighted in *blue*, (ii) click the **Open** button, and the *Caseload Details* screen will appear.

Refer to the [Caseload Details](#) section on how to navigate the *Caseload Details* screen.

iv. **Contacts Button**

1. Click the **Contacts** button and *Caseload Details* screen will open to the *Contacts* tab.

Refer to the [Caseload Details](#) section on how to navigate the *Caseload Details* screen.

v. **Close Button**

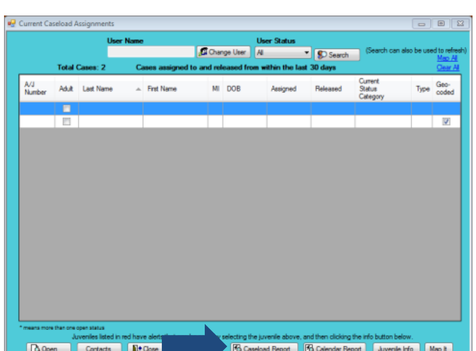
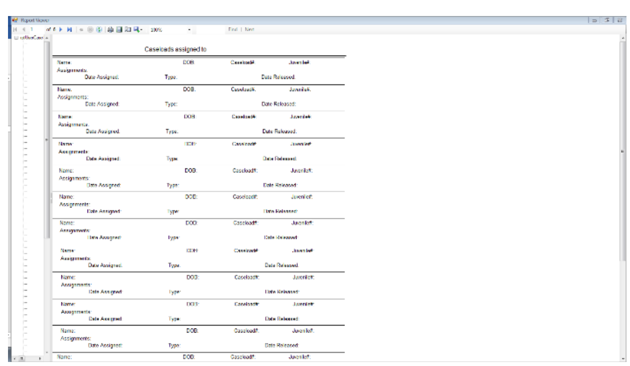
1. Click the **Close** button and you will return to the *Caseload Details* screen.

vi. **Help Button**

1. Click the **Help** button and the *Help* screen will appear. The *Help* screen describes the current caseload assignments.

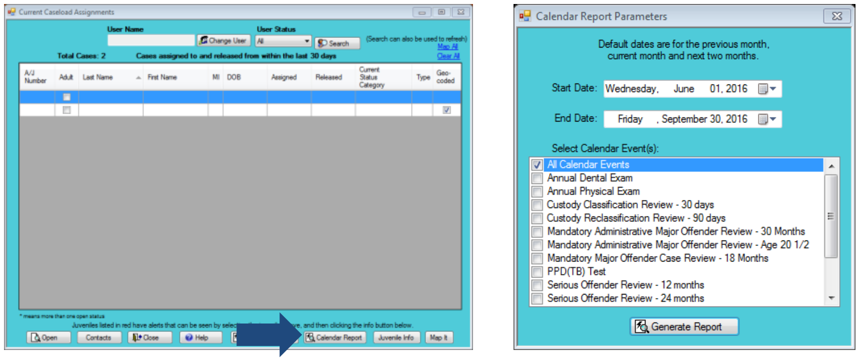
vii. **Caseload Report Button**

1. The Caseload report lists the juvenile name, date of birth, caseload number, juvenile number, date assigned, assignment type, and date released information for the cases assigned to the user. Click the **Caseload Report** button, and the *Report Viewer* screen will appear, and the report will appear.

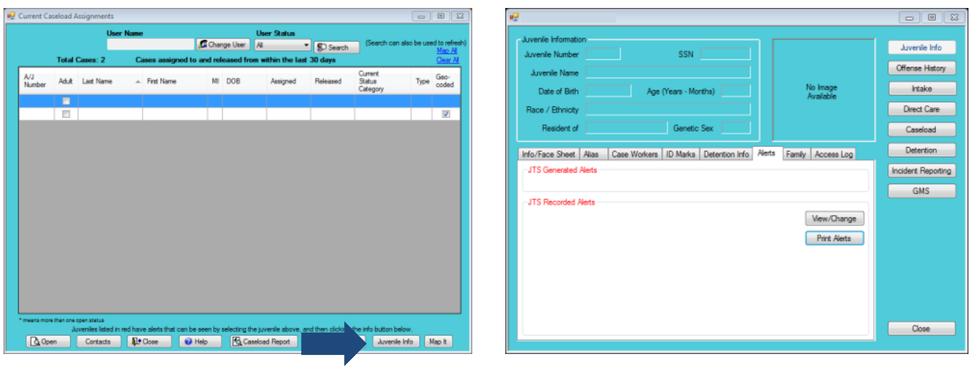
viii. **Calendar Report Button**

1. The **Calendar** report lists the calendar events and descriptions related to the user. (i) Click the **Calendar Report** button, and the *Calendar Report Parameters* screen will appear, select the (ii) **Start Date** and (iii) **End Date** from the calendar screens, (iv) select one or more **Calendar Event(s)** to display on the report, (v) click the **Generate Report** button, and the report will appear.



ix. **Juvenile Info Button**

1. Click the **Juvenile Info** button and the *Juvenile Information* screen will appear.



Refer to the [Juvenile and Adult Information Screens User Manual] on how to navigate the *Juvenile Information* screen.

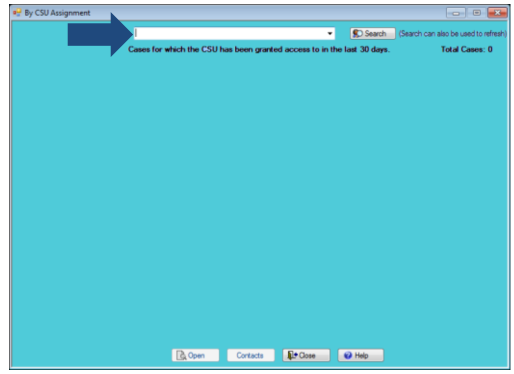
x. **Map It Button**

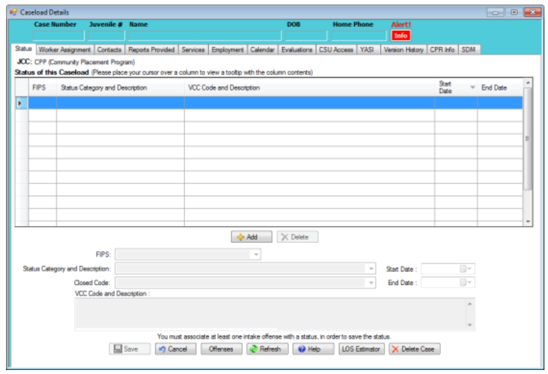
The **Map All** hyperlink will select all of the Geocoded options that are listed.

1. Juvenile records with a checkbox in the **Geocoded** field have an address that can be geocoded and mapped. Records without a checkbox cannot be mapped due to a missing address, or a recorded address that cannot be matched to the database of geocoded addresses.
   a. To create a map, (i) select the record(s) that you would like to display on the map. All the geocoded records will be selected by default. If you would like to clear all the selected records, (ii) click the **Clear All** hyperlink, and (iii) click the checkbox next to the desired record(s) to select individual record(s). (iv) Click the **Map It** button and the *Map Address* screen will appear.

Refer to the Juvenile & Adult Information Screens User Manual on how to edit and correct a youth's address and how to navigate the *Map Addresses* screen.

6. **By CSU Assignment**
   a. (i) Select the **By CSU Assignment** option from the drop-down menu, and the *By CSU Assignment* screen will appear, (ii) select a **CSU** from the drop-down menu, (iii) click the **Search** button, and the cases the selected CSU has been granted access to in the last 30 days will be listed, (iv) select a juvenile's name, and the row will be highlighted in *blue*, (v) click the **Open** button, and the *Caseload Details* screen will appear.



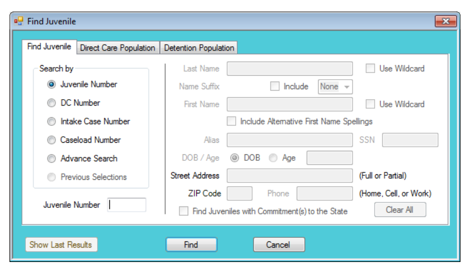


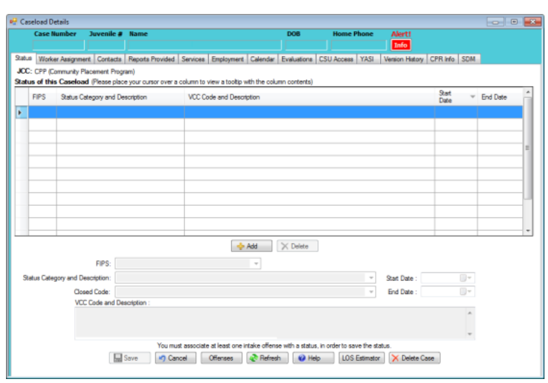
- Refer to the [Caseload Details](#) section on how to navigate the *Caseload Details* screen.

Adding a New Caseload

To add a new juvenile caseload from the *Caseload Main* screen:

1. (i) Click the **File** menu, (ii) select **New** from the drop-down menu, (iii) select the **Juvenile Caseload** from the drop-down menu, and the *Find Juvenile* screen will appear, (iv) select a juvenile, and the *Caseload Details* screen will appear.



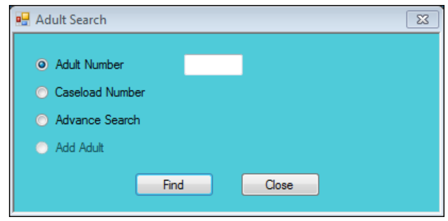


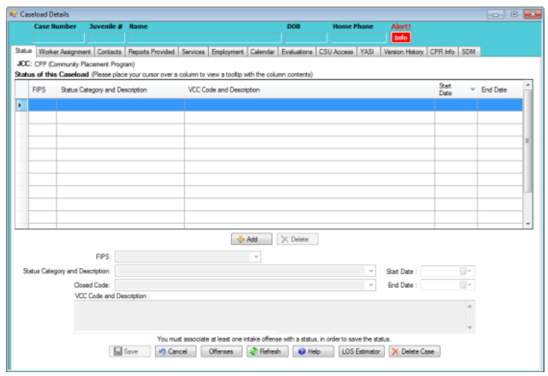
- Refer to the [Login & Search User Manual](#) for instructions on how to search for a juvenile.
- Refer to the [Caseload Details](#) section on how to navigate the *Caseload Details* screen.

Add a New Adult Caseload

To add a new adult caseload from the *Caseload Main* screen:

1. (i) Click the **File** menu, (ii) select **New** from the drop-down menu, (iii) select the **Adult Caseload** from the drop-down menu, and the *Adult Search* screen will appear, (iv) select an adult, and the *Caseload Details* screen will appear.





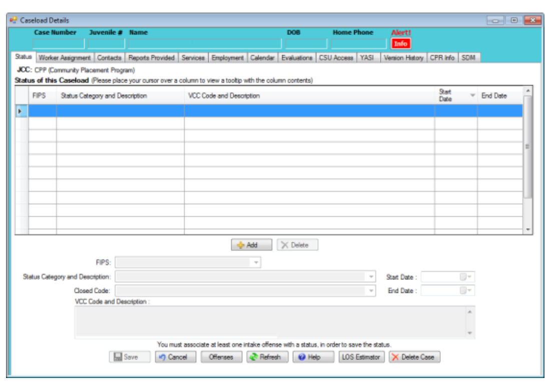
- Refer to the Login & Search User Manual on how to search for an adult.
- Refer to the Caseload Details section on how to navigate the *Caseload Details* screen.

Caseload Details Screen

From the *Caseload Details* screen, for a juvenile caseload, you can access the case number, juvenile number, juvenile's name, date of birth, and home phone number. For an adult caseload, you can access the adult number, name, date of birth, and home phone number.

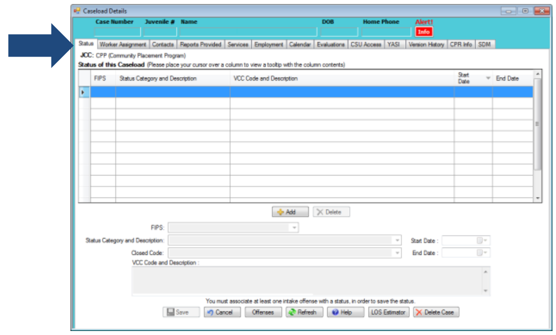
The *Caseload Details* screen consists of the *Status*, *Worker Assignment*, *Contacts*, *Reports Provided*, *Service*, *Employment*, *Calendar*, *Evaluations*, *CSU Access*, YASI, *Version History*, *CPR Info*, and *SDM* tabs.

The **Juvenile Information** at the top of the screen cannot be edited from the *Caseload Details* screen.



1. **Status Tab**
   The *Caseload Details* screen will automatically open to the *Status* tab. This tab lists all the current and past case statuses, and the statuses' relevant information.

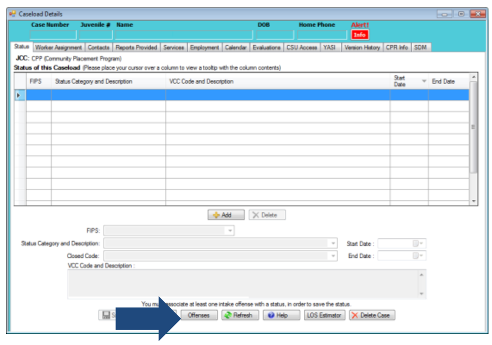
- You cannot add a second status while another status is open for the same FIPS, with the exception of **1 – Pre-Disposition (1 Contact/Month)**.
- When closing a case, the **End Date** should match the **Date Released** in the *Worker Assignment* tab for the most recent primary caseworker.
- If you select an incorrect **Status**, an error message will appear.

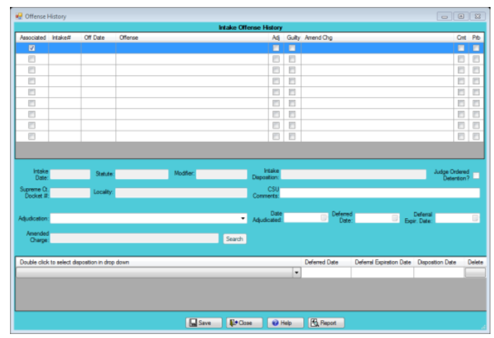


a. **Add Button**

i. (i) Click the **Add** button, and the fields at the bottom of the screen will become accessible, select the (ii) **FIPS** and (iii) **Status Category and Description** from the drop-down menus, and (iv) select the **Start Date** from the calendar screen.

ii. In order to input or associate a **VCC Code and Description**, (i) click the **Offenses** button, and the *Offense History* screen will appear.

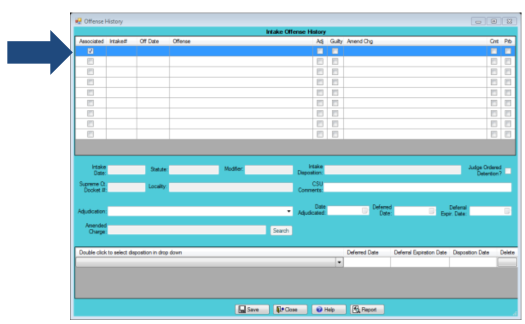


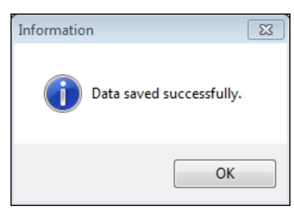


1. **Associate an Offense**

a. In order to link an offense to a **Status**, you must associate the listed offense(s). (i) Select an offense by clicking the corresponding **Associate** checkbox, and the row will be highlighted in *blue*, (ii) click the **Save** button, and an information screen confirming the data was saved successfully will appear, and (iii) click the **OK** button.

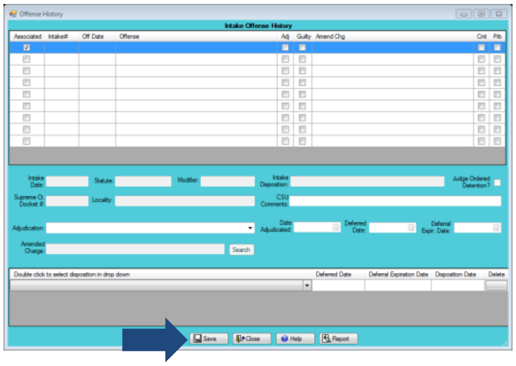
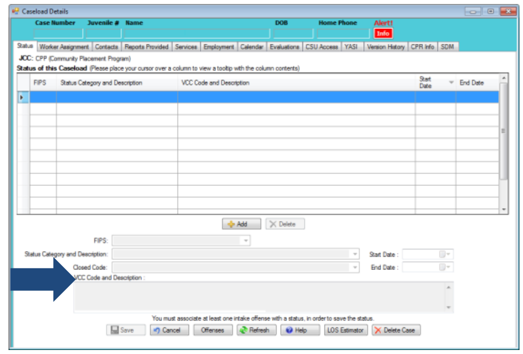
- The **Associated** column is available ONLY when accessing the *Offense History* screen from the *Caseload Details* screen.
- ONLY associate an offense if it is linked to the selected **Status** on the *Status* tab.
- In order to associate multiple offenses under the selected





b. In order to associate multiple offenses under the selected **Status**, repeat the steps above.

c. (i) Click the **Close** button, and you will return to the *Status* tab in the *Caseload Details* screen, (ii) click the **Save** button, and the associated offense(s) will appear in the **VCC and Description** section.

If an offense is being associated to a **Probation** or **Committed to DJJ** status, you MUST add the appropriate disposition(s).

Refer to the [Offense History User Manual] on how to navigate the *Offense History* screen.

b. **Delete Button**
   i. (i) Select a status, and the row will be highlighted in *blue*, and (ii) click the **Delete** button.

Every **Status** must be associated with at least one offense through the *Offense History* screen.

c. **Edit an Existing Status**
   i. (i) Select a status, and the row will be highlighted in *blue*, (ii) edit the information, and (iii) click the **Save** button when the edits are completed.
   ii. If you would like to edit the **VCC and Description**, (i) click the **Offenses** button, (ii) edit the information, click the (iii) **Save** button and (iv) **Close** button to return to the *Caseload Details* screen, and (v) click the **Save** button to save the edited information.

Refer to the [Offense History User Manual] on how to navigate the *Offense History* screen.

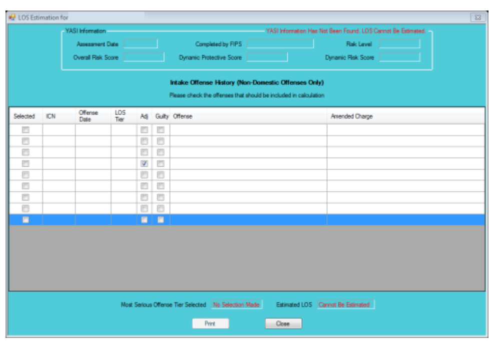
A juvenile's LOS cannot be estimated if a YASI assessment is not completed.

d. **Refresh Button**
   i. Click the **Refresh** button to ensure the most current information is being displayed.

e. **Help Button**
   i. Click the **Help** button and the *Help* screen will appear. The *Help* screen lists instructions on how to add, edit, and delete a case status and case.

The **Most Serious Offense Tier Selected** and the **Estimated LOS** fields at the bottom of the screen will change based on the most serious **Selected** offense(s).

f. **LOS Estimator Button**
   i. Click the **LOS Estimator** button and the *LOS Estimation* screen will appear. At the top of this screen, you will find the summary of the **YASI Information** for the juvenile.



The **LOS Estimation Report** is to be included with (i) pre-dispositional reports where an indeterminate commitment is being recommended and (ii) commitment packets.

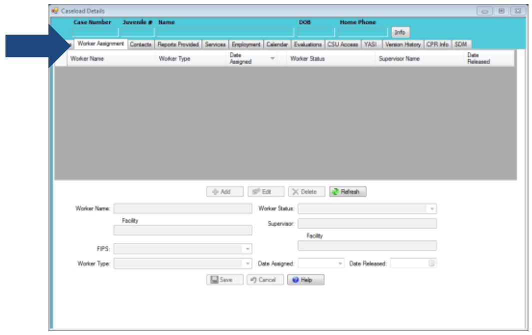
   i. Click the **Selected** checkbox accompanying the offense(s). Select ONLY the offense(s) that the juvenile is being committed for in order for it to be included in the LOS estimation.

g. **Print Button**
   i. The **LOS Estimation Report** lists the estimated LOS, risk level, most serious offense tier, and other related information. Click the **Print** button and the completed report will appear.

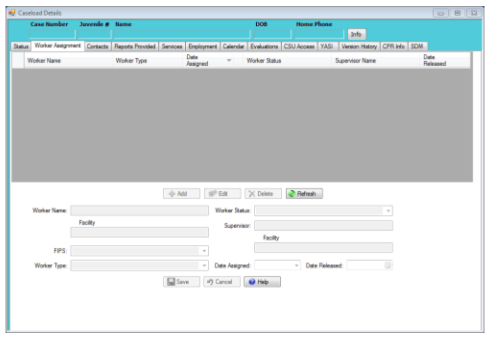
h. **Close Button**
   i. Click the **Close** button and you will return to the *Caseload Details* screen.

2. **Worker Assignment Tab**
   This tab shows the workers assigned to the selected juvenile's case. You can find the worker's name, worker type, the date the worker was assigned to the juvenile, worker status, supervisor's name, and the date released information.

- You can add multiple secondary workers to a single case.
- The **Supervisor** should NOT be edited unless it was added in error.
- In order to change the assigned worker or supervisor, the existing entry MUST be closed out and a new assignment MUST be created.
- When a juvenile is released from direct care, the assigned workers and supervisors will receive an email notification.



a. **Add Button**
   i. (i) Click the **Add** button, and the fields at the bottom of the screen will become accessible, select the (ii) **FIPS**, (iii) **Worker Type**, and (iv) **Worker Status** from the drop-down menus, (v) select the **Date Assigned** from the calendar screen, and (vi) click the **Save** button.
   ii. The **Worker Name** and **Supervisor** fields will auto-populate with your name.



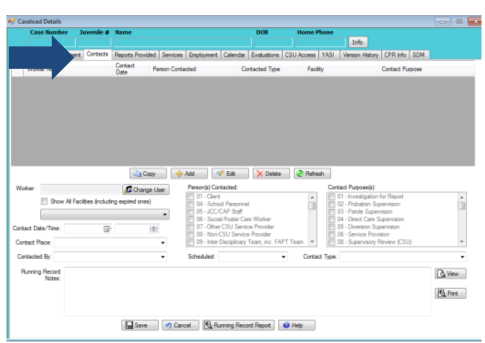
Refer to the Change User section on how to navigate the **Change User** button.

b. **Edit Button**
   i. (i) Select a worker's name, and the row will be highlighted in *blue*, (ii) click the **Edit** button, (iii) edit the information, and (iv) click the **Save** button when the edits are completed.

Refer to Appendix A on how to change the assigned supervisor.
Refer to Appendix B on how to change the assigned worker.

c. **Delete Button**
   i. (i) Select a worker's name, and the row will be highlighted in *blue*, and (ii) click the **Delete** button.
d. **Refresh Button**
   i. Click the **Refresh** button to ensure the most current information is being displayed.
e. **Help Button**
   i. Click the **Help** button and the *Help* screen will appear. The *Help* screen lists instructions on how to add, edit, and delete a worker.

3. **Contacts Tab**
This tab lists all the contacts, the worker's name, contact date, person contacted, contact type, contacted place, purpose of contact, and the worker's facility information.



- The *Contacts* tab can be directly accessed from the *Current Caseload Assignment* screen by clicking the **Contacts** button.
- If one contact serves multiple purposes, you can save time by copying the entry.
- Information in the **Running Record Notes** textbox must be as detailed as possible.
- Click the **View** button to view all the text in the **Running Record Notes** textbox.
- Click the **Print** button to print a specific contact entry.

a. **Copy Button**

i. (i) Select a contact entry you wish to copy, and the row will be highlighted in *blue*, (ii) click the **Copy** button, a duplicate entry of the selected contact entry will be created, (iii) edit the information, and (iv) click the **Save** button.

b. **Add Button**

i. (i) Click the **Add** button, and the fields at the bottom of the screen will become accessible, select the (ii) **Contact Date/Time** from the calendar screen and timetable, select the (iii) **Contact Place** and (iv) **Contacted By** fields from the drop-down menus, (v) click one of more **Person(s) Contacted** and (vi) **Purpose of Contact** using the checkboxes, select the (vii) **Scheduled** and (viii) **Contact Type** fields from the drop-down menus, (ix) type a detailed narrative of the contact in the **Running Record Notes** textbox, and (x) click the **Save** button.

ii. The **Worker Name** field will auto-populate with your name.

Refer to the Change User section on how to navigate the **Change User** button.

c. **Edit Button**

i. (i) Select a contact, and the row will be highlighted in *blue*, (ii) click the **Edit** button, (iii) edit the information, and (iv) click the **Save** button when the edits are completed.

d. **Delete Button**

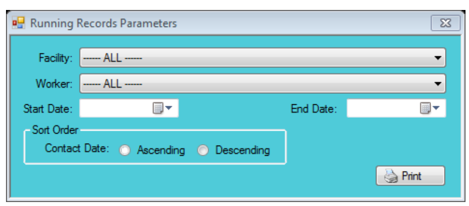
i. (i) Select a contact, and the row will be highlighted in *blue*, and (ii) click the **Delete** button.

e. **Refresh Button**

i. Click the **Refresh** button to ensure the most current information is being displayed.

f. **Running Record Report Button**

i. (i) Click the **Running Record Report** button, and the *Running Records Parameters* screen will appear, select the (ii) **Facility** and (iii) **Worker** from the drop-down menus, select the (iv) **Start Date** and (v) **End Date** from the calendar screens, you can sort the contact date by ascending or descending order from the **Sort Order** options, (vi) click the **Print** button to view the report, and the running record notes will appear.

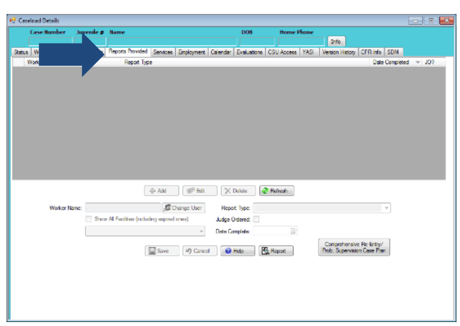


g. **Help Button**

i. Click the **Help** button and the *Help* screen will appear. The *Help* screen lists instructions on how to add, edit, copy, and delete a contact.

4. **Reports Provided Tab**

This tab lists the names of the worker completing the report, date of the report, and indicates if the report is ordered by the judge information.



a. **Add Button**

i. (i) Click the **Add** button, and the fields at the bottom of the screen will become accessible, and (ii) select the **Report** type from the drop-down menu. If the report type is judge ordered, click the **Judge Ordered** checkbox. (iii) Select the **Date Completed** from the calendar screen and (iv) click the **Save** button.

ii. The **Worker Name** field will auto-populate with your name.

Refer to the Change User section on how to navigate the **Change User** button.

b. **Edit Button**

i. (i) Select a worker's name, and the row will be highlighted in *blue*, (ii) click the **Edit** button, (iii) edit the information, and (iv) click the **Save** button when the edits are completed.

c. **Delete Button**

i. (i) Select a worker's name, and the row will be highlighted in *blue*, and (ii) click the **Delete** button.

d. **Refresh Button**

i. Click the **Refresh** button to ensure the most current information is being displayed.

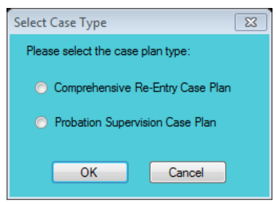
e. **Help Button**

i. Click the **Help** button and the *Help* screen will appear. The *Help* screen lists instructions on how to add, edit, and delete a report.

f. **Report Button**

i. The **Reports Provided** report lists the report types completed by employees related to a specific juvenile. Click the **Report** button and the report will appear.

g. **Comprehensive Re-Entry/Prob. Supervision Case Plan Button**

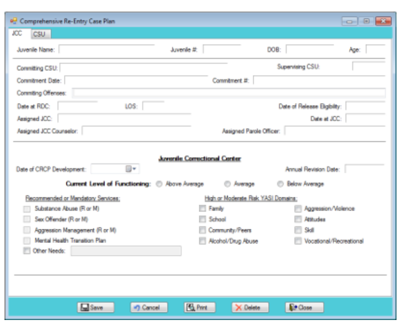


In order to add a **Comprehensive Re-Entry Case Plan**, the juvenile must have a Direct Care admission.

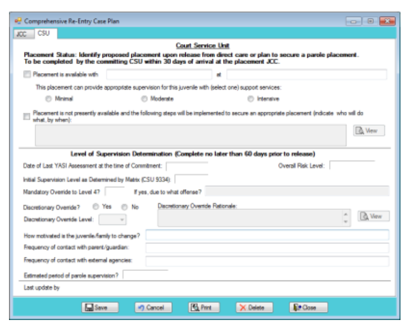
In order to add a **Probation Supervision Case Plan**, the juvenile must have a probation status.

i. (i) Click the **Comprehensive Re-Entry/Prob. Supervision Case Plan** button, and the *Select Case Type* screen will appear, (ii) select a case plan, (iii) click the **OK** button, and the screen of the selected case plan type will appear, and (iv) complete the selected case plan.

1. **Comprehensive Re-Entry Case Plan**



OR



a. (i) Select the appropriate tab, (ii) type the information into the respective fields, (iii) select the options that apply, and (iv) click the **Save** button.

b. **Cancel Button**

i. Click the **Cancel** button and unsaved information will be cleared.

c. **Print Button**

i. Click the **Print** button and the completed **Comprehensive Re-Entry Case Plan** will appear.

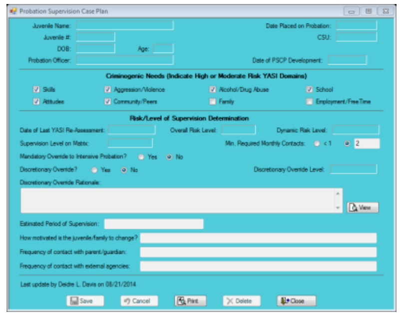
d. **Delete Button**

i. Click the **Delete** button and you will return to the *Reports Provided* tab in the *Caseload Details* screen.

e. **Close Button**

i. Click the **Close** button you will return to the *Reports Provided* tab in the *Caseload Details* screen.

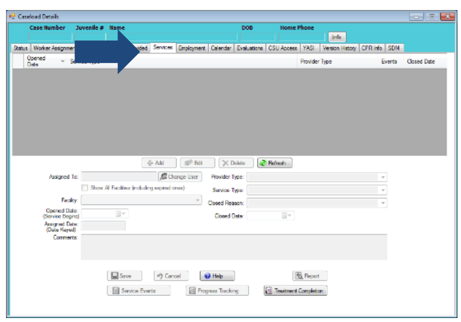
2. **Probation Supervision Case Plan**



   a. (i) Select the options that apply, (ii) type the information into the respective fields, and (iii) click the **Save** button.

3. **Cancel Button**
   a. Click the **Cancel** button and unsaved information will be cleared.
4. **Print Button**
   a. Click the **Print** button and the completed **Probation Supervision Case Plan** will appear.
5. **Delete Button**
   a. Click the **Delete** button and you will return to the *Reports Provided* tab in the *Caseload Details* screen.
6. **Close Button**
   a. Click the **Close** button you will return to the *Reports Provided* tab in the *Caseload Details* screen.

5. **Services Tab**
This tab lists all the current and past services received, the opened date, service type, provider type, an indication of whether a service event was recorded, and the closed date information.



The **Assigned Date (Date Keyed)** field will auto-populate when you click the **Save** button.

A service cannot be deleted if it has associated service events.

a. **Add Button**
   i. (i) Click the **Add** button, and the fields at the bottom of the screen will become accessible, (ii) select the **Opened Date (Services Begins)** from the calendar screen, select the (iii) **Provider Type**, (iv) **Service Type**, and (v) **Closed Reason** (if applicable) from the drop-down menus, (vi) select the **Closed Date** (if applicable) from the calendar screen, (vii) type a detailed narrative of the service in the **Comments** textbox, and (viii) click the **Save** button.
   ii. The **Assigned To** field will auto-populate with your name.

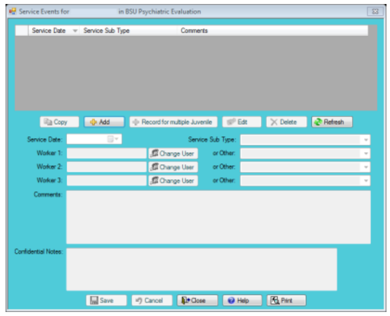
Refer to the Change User section on how to navigate the **Change User** button.

b. **Edit Button**
   i. (i) Select a service, and the row will be highlighted in *blue*, (ii) click the **Edit** button, (iii) edit the information, and (iv) click the **Save** button when the edits are completed.
c. **Delete Button**
   i. (i) Select a service, and the row will be highlighted in *blue*, and (ii) click the **Delete** button.
d. **Refresh Button**
   i. Click the **Refresh** button to ensure the most current information is being displayed.

e. **Help Button**
   i. Click the **Help** button and the _Help_ screen will appear. The _Help_ screen lists instructions on how to add, edit, and delete a service, and add a service event.

f. **Report Button**
   i. The **Services Provided** report lists the service information related to a specific juvenile. Click the **Report** button and the report will appear.

g. **Service Events Button**
   i. Click the **Service Events** button and the _Services Events_ screen will appear. The _Service Events_ screen will list the **Service Date**, **Service Sub Type**, and **Comments** (if any) information.



   ii. **Copy Button**
      1. (i) Select a service event entry you wish to copy, and the row will be highlighted in _blue_, (ii) click the **Copy** button, and a duplicate entry of the selected service event will be created, (iii) edit the information, and (iv) click the **Save** button.

   iii. **Add Button**
      1. (i) Click the **Add** button, and the fields at the bottom of the screen will become accessible, (ii) select the **Service Date** from the calendar screen, select the (iii) **Service Sub Type** and/or the (iv) **or Other** from the drop-down menus, (v) type important information about the service event in the **Comments** textbox, and (vi) click the **Save** button.
         a. The **Worker 1** field will auto-populate with your name. If you would like to change the **Worker 1**, click the **Change User** button.
         b. Repeat the steps above to add **Worker 2** and **Worker 3** information (if applicable).

Refer to the Change User section on how to navigate the **Change User** button.

   iv. **Record for multiple Juvenile Button**
      1. If you would like to record the same service event for multiple juveniles, (i) click the **Add** button, and the fields at the bottom of the screen will become accessible, (ii) select the **Service Date** from the calendar screen, (iii) select the **Service Sub Type** and/or the **or Other** from the drop-down menus, (iv) type important information about the service event in the **Comments** textbox, (v) click the **Record for multiple Juvenile** button, and the _Select Juveniles_ screen will appear, (vi) select one or more juveniles, (vii) click the **Select** button, and you will return to the _Service Events_ screen, (viii) click the **Save** button, and the information will copy to the selected juveniles' caseload.

   v. **Edit Button**
      1. (i) Select a service event, and the row will be highlighted in _blue_, (ii) click the **Edit** button, (iii) edit the information, and (iv) click the **Save** button when the edits are completed.

   vi. **Delete Button**
      1. (i) Select a service event, and the row will be highlighted in _blue_, and (ii) click the **Delete** button.

   vii. **Refresh Button**
      1. Click the **Refresh** button to ensure the most current information is being displayed.

viii. **Close Button**

1. Click the **Close** button to exit the <u>*Service Events*</u> screen and you will return to the *Services* tab in the <u>*Caseload Details*</u> screen.

ix. **Help Button**

1. Click the **Help** button and the <u>*Help*</u> screen will appear. The <u>*Help*</u> screen lists instructions on how to add, edit, and delete a service event.

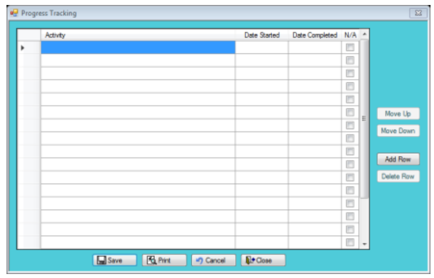
x. **Print Button**

1. The **Service Event** report lists the selected service event related to the specific juvenile. Click the **Print** button and the report will appear.

h. **Progress Tracking Button**

i. Click the **Progress Tracking** button and the <u>*Progress Tracking*</u> screen will appear. This screen consists of **Activity**, **Date Started**, and **Date Completed** information.

- Juveniles participating in some treatment programs will have auto-populated information in the <u>*Progress Tracking*</u> screen.



ii. In order to add activity information, (i) double click the row under the **Activity** heading, (ii) type in important information about the service progress, select the (iii) **Date Started** and (iv) **Date Completed** from the calendar screens by double clicking each field, and (v) click the **Save** button.

iii. **Move Up/Move Down Buttons**

1. In order to move the activity's order, (i) click the row under the **Activity** heading, and the row will be highlighted in *blue*, (ii) click the arrow to the left of the highlighted row, (iii) click the **Move Up** or **Move Down** buttons until the activity is where you want it to be, and (iv) click the **Save** button.

iv. **Add Row Button**

1. Click the **Add Row** button to add a row for another activity entry.

v. **Delete Row Button**

1. (i) Select an activity entry by clicking the arrow on the left hand side of the screen, and the row will be highlighted in *blue*, and (ii) click the **Delete Row** button.

vi. **Print Button**

1. The **Service Progress Tracking** report lists the progress for the activities related to the specific juvenile. Click the **Print** button and the report will appear.

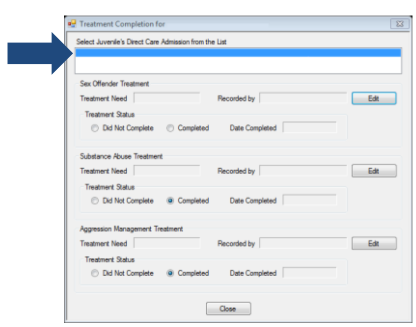
vii. **Close Button**

1. Click the **Close** button and you will return to the *Services* tab in the <u>*Caseload Details*</u> screen.

i. **Treatment Completion Button**

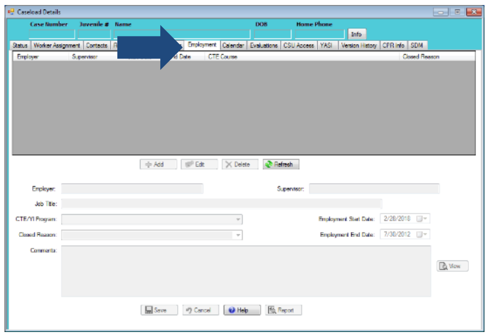
i. Click the **Treatment Completion** button and the <u>*Treatment Completion*</u> screen will appear. This screen lists the different types of treatments (i.e., sex offender, substance abuse, and aggression management) the selected juvenile is participating in, treatment need status, recorded by name, and the treatment status information.

- If the juvenile has completed the treatment, a date will be documented in the **Date Completed** field.



a. **Edit Button**
   1. (i) Select a direct care admission, and the row will be highlighted in *blue*, (ii) click the **Edit** button, (ii) edit the information, and (iii) click the **Save** button when the edits are completed.
   2. **Cancel Button**
      i. Click the **Cancel** button and the accessible fields will close.
   3. **Clear Button**
      i. Click the **Clear** button and the **Treatment Status** information will be cleared.

6. **Employment Tab**
   This tab lists the selected juvenile's employment information, such as employer and supervisor information, employment start and end dates, CTE Course, and closed reason information.



- Enter the **Closed Reason** and **Employment End Date** when applicable.
- Information in the **Comments** textbox can be edited by clicking the **View** button.

a. **Add Button**
   i. (i) Click the **Add** button, and the fields at the bottom of the screen will become accessible, type the (ii) **Employer** and (iii) **Supervisor** names, and (iv) **Job Title**, (v) select the **CTE/YI Program** from the drop-down menu, (vi) select the **Employment Start Date** from the calendar screen, (vii) select the **Closed Reason** (if applicable) from the drop-down menu, (viii) select the **Employment End Date** (if applicable) from the calendar screen, (ix) type important information about the employment in the **Comments** textbox, and (x) click the **Save** button.

b. **Edit Button**
   i. (i) Select an entry, and the row will be highlighted in *blue*, (ii) click the **Edit** button, (iii) edit the information, and (iv) click the **Save** button when the edits are completed.

c. **Delete Button**
   i. (i) Select an entry, and the row will be highlighted in *blue*, and (ii) click the **Delete** button.

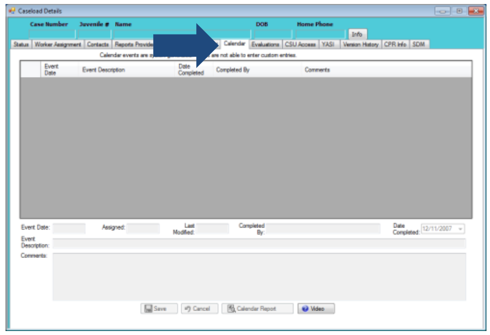
d. **View Button**
   i. Click the **View** button and the <u>*Employment Comments*</u> screen will appear. This screen allows you to view and/or edit the information in the **Comments** textbox.

e. **Refresh Button**
   i. Click the **Refresh** button to ensure the most current information is being displayed.

f. **Help Button**
   i. Click the **Help** button and the <u>*Help*</u> screen will appear. The <u>*Help*</u> screen lists instructions on how to add, edit, and delete an employment entry.

g. **Report Button**
   i. The **Employment Records** report lists the employment information related to the specific juvenile. Click the **Report** button and the report will appear.

7. **Calendar Tab**
   This tab lists all the system generated calendar events for the selected juvenile, event date, description, date completed, completed by, and related comments information. Users cannot add custom entries.



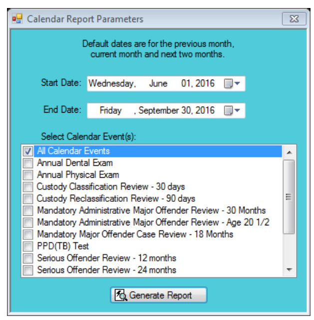
- The **Event Date**, **Assigned**, **Completed by**, and the **Event Description** fields will auto-populate.
- Only the **Date Completed** and the information in the **Comments** textbox can be edited.

a. **Edit an Existing Calendar Event**

   i. (i) Select a calendar event, and the row will be highlighted in *blue*, (ii) edit the information at the bottom of the screen, and (iii) click the **Save** button when the edits are complete.

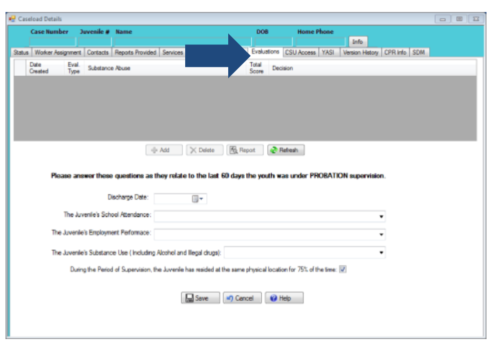
b. **Calendar Report Button**

   i. The **Calendar Report** lists the calendar events and descriptions related to the specific juvenile. (i) Click the **Calendar Report** button, and the *Calendar Report Parameters* screen will appear, select the (ii) **Start Date** and (iii) **End Date** from the calendar screens, (iv) select one or more **Calendar Event(s)** to display on the report, (v) click the **Generate Report** button, and the report will appear.

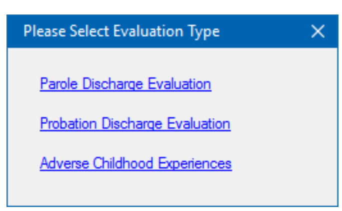


8. **Evaluations Tab**

This tab lists the date the evaluation was created, evaluation type, level of substance use, the total risk score, and decision regarding supervision level (if applicable) information for parole and probation discharge evaluations, parole supervision risk re-assessment, and adverse childhood experiences of the selected juvenile.



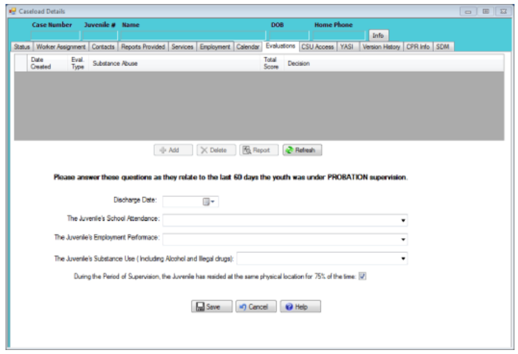
a. **Add Button**



   i. (i) Click the **Add** button, and the *Please Select Evaluation Type* screen will appear, and (ii) select the evaluation type.

1. **Parole Discharge Evaluation Hyperlink**

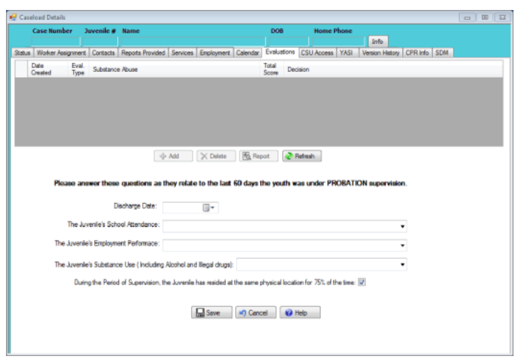
Answer the questions on the **Parole Discharge Evaluation** as they relate to the last 60 days the youth was under PAROLE supervision.



   a. (i) Click the **Parole Discharge Evaluation** hyperlink, and the fields at the bottom of the screen will become accessible, (ii) select the **Discharge Date** from the calendar screen, select the (iii) **The Juvenile's School attendance**, (iv) **The Juvenile's Employment Performance**, and (v) **The Juvenile's Substance Use (Including Alcohol and Illegal drugs)** from the drop-down menus. If the juvenile resides at the same physical location for 75% of the period of supervision, click the **During the Period of Supervision, the Juvenile has resided at the same physical location for 75% of the time** checkbox. (vi) Click the **Save** button.
   b. **Cancel Button**
      i. Click the **Cancel** button and you will return to the *Evaluations* tab in the *Caseload Details* screen.
   c. **Help Button**
      i. Click the **Help** button and the *Help* screen will appear. The *Help* screen lists instructions on how to add, edit, and delete an evaluation.

2. **Probation Discharge Evaluation Hyperlink**

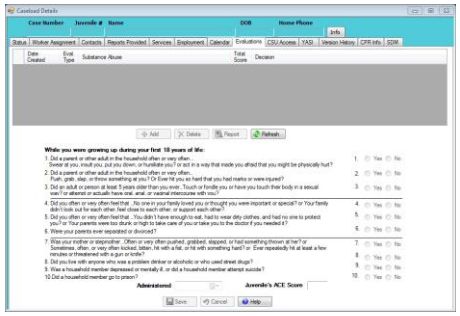
Answer the questions on the **Probation Discharge Evaluation** as they relate to the last 60 days the youth was under PROBATION supervision.



   a. (i) Click the **Probation Discharge Evaluation** hyperlink, and the fields at the bottom of the screen will become accessible, (ii) select the **Discharge Date** from the calendar screen, select the (iii) **The Juvenile's School attendance**, (iv) **The Juvenile's Employment Performance**, and (v) **The Juvenile's Substance Use (Including Alcohol and Illegal drugs)** from the drop-down menu. If the juvenile resides at the same physical location for 75% of the period of supervision, click the **During the Period of Supervision, the Juvenile has resided at the same physical location for 75% of the time** checkbox. (vi) Click the **Save** button.
   b. **Cancel Button**
      i. Click the **Cancel** button and you will return to the *Evaluations* tab in the *Caseload Details* screen.
   c. **Help Button**
      i. Click the **Help** button and the *Help* screen will appear. The *Help* screen lists instructions on how to add, edit, and delete an evaluation.

3. **Adverse Childhood Experiences Hyperlink**

Select the options on the **Adverse Childhood Experiences** based on the juvenile's first 18 years of life.



a. (i) Click the **Adverse** hyperlink, and the fields at the bottom of the screen will become accessible, (ii) select **Yes** or **No** for each question, (iii) select the **Administered** date from the calendar screen, and the **Juvenile's ACE Score** field will auto-populated based on the selected responses, and (iii) click the **Save** button.

b. **Cancel Button**
   i. Click the **Cancel** button and you will return to the *Evaluations* tab in the *Caseload Details* screen.

c. **Help Button**
   i. Click the **Help** button and the *Help* screen will appear. The *Help* screen lists instructions on how to add, edit, and delete an evaluation.

b. **Delete Button**
   i. (i) Select an evaluation, and the row will be highlighted in *blue,* (ii) click the **Delete** button, and the evaluation will be deleted.

c. **Report Button**
   i. The **Evaluation** report lists the evaluation information related to the specific juvenile. (i) Select an evaluation, and the row will be highlighted in *blue*, (ii) click the **Report** button, and the report will appear.

d. **Refresh Button**
   i. Click the **Refresh** button to ensure the most current information is being displayed.

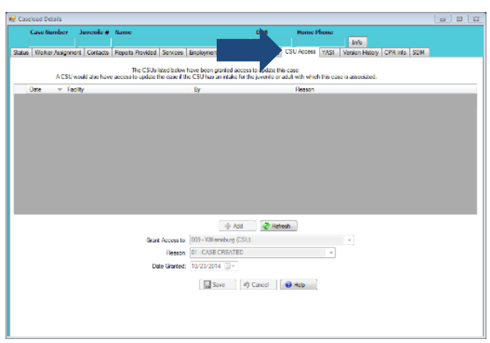
e. **Help Button**
   i. Click the **Help** button and the *Help* screen will appear. The *Help* screen lists instructions on how to add, edit, and delete an evaluation.

f. **Edit an Existing Evaluation**
   i. (i) Select an evaluation, and the row will be highlighted in *blue*, (ii) edit the information at the bottom of the screen, and (iii) click the **Save** button when the edits are completed.

9. **CSU Access Tab**

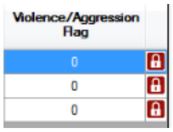
This tab lists the CSUs that have access to update the juvenile's case, the date the access was granted, facility name, who the access is granted by, and the reason information.

Users cannot edit an entry if the **Reason** is **01 – Case Created**.



a. **Add Button**
   i. (i) Click the **Add** button, and the fields at the bottom of the screen will become accessible, select the (ii) **Grant Access to** and the (iii) **Reason** from the drop-down menus, (iv) select the **Date Granted** from the calendar screen, and (v) click the **Save** button.

> If there is a YASI item response issue that requires a reassessment, item responses for the current assessment will be locked.



b. **Refresh Button**

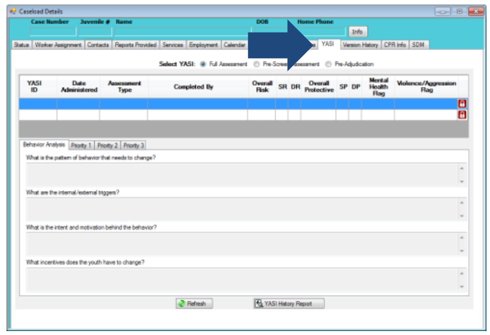
i. Click the **Refresh** button to ensure the most current information is being displayed.

c. **Help Button**

i. Click the **Help** button and the *Help* screen will appear. The *Help* screen lists instructions on how to add a new CSU access and edit existing access.

10. **YASI Tab**

This tab lists the YASI ID, date administered, assessment type, who completed it, risk and protective levels, mental health flags, and violence aggression flags information for YASI full assessments, pre-screen assessments, and pre-adjudications.



a. **Full Assessment Radio Button**

i. The **Full Assessment** shows the YASI ID, date administered, assessment type, who completed it, risk and protective levels, mental health flags, and violence aggression flags information, and consists of the *Behavior Analysis*, *Priority 1*, *Priority 2*, and *Priority 3* tabs.

1. Select a YASI report, and the row will be highlighted in *blue*, and the information will auto-populate into the tabs.

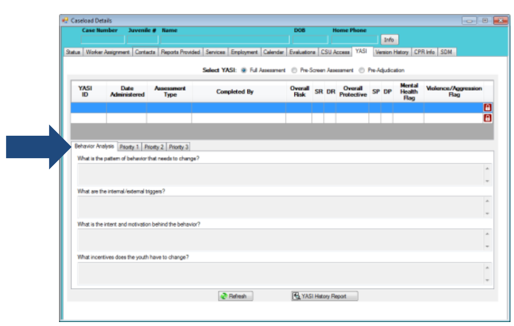
a. **Behavioral Analysis Tab**

i. The **What is the pattern of behavior that needs to change** textbox will list all the offenses, or other problem behavior, that resulted in the juvenile's involvement in the justice system.

ii. The **What are the internal/external triggers** textbox will list all the internal and/or external triggers that the juvenile has that increases their likelihood of becoming involved in criminal activity.

iii. The **What is the intent and motivation behind the behavior** textbox will list the juvenile's purpose for the behavior and motivation for them to become involved in the pattern of behavior that needs to change.

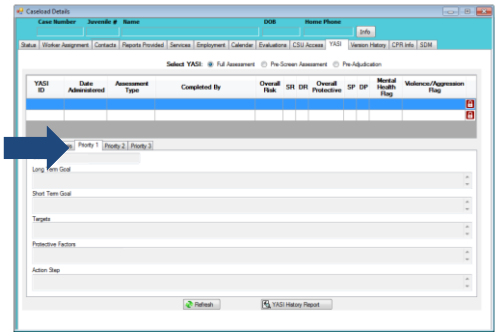
iv. The **What incentives does the youth have to change** textbox will list the desires, abilities, reasons, needs, or anticipated outcomes that could serve as important incentives or motivating factors for the juvenile to change or adapt new behaviors.

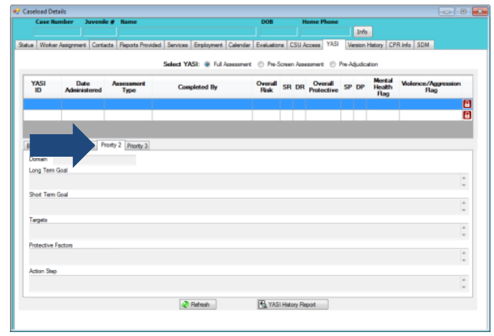


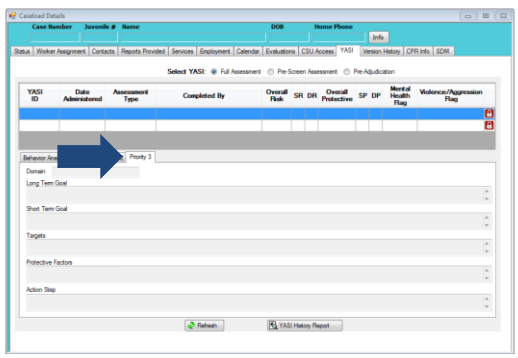
b. **Priority 1**, **Priority 2**, **and Priority 3 Tabs**

i. The **Domain** textbox will list the domain that was selected on the domain wheel as the number one priority.

ii. The **Long Term Goal** textbox will list the long-term goal that the juvenile will be working on towards the domain.
iii. The **Short Term Goal** textbox will list the short-term goal that the juvenile will be working on towards the domain.
iv. The **Targets** textbox will list the target items that are planned to be addressed.
v. The **Protective Factors** textbox will list the protective factors the juvenile has in the listed domain.
vi. The **Action Step** textbox will list the planned action the parole officer will take with the juvenile.

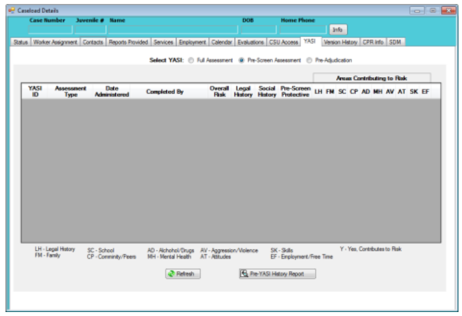






2. **Refresh Button**
   a. Click the **Refresh** button to ensure the most current information is being displayed.
3. **YASI History Report Button**
   a. The YASI History report lists the juvenile name, juvenile number, date of birth, assessment ID, administered date, completed by, risk and protective levels, behavioral analysis, priority one, priority two, and priority three information. Click the **YASI History Report** button, and the *Report Viewer* screen will appear, and the report will appear.

b. **Pre-Screen Assessment Radio Button**
   i. The **Pre-Screen Assessment** shows the YASI ID, assessment type, date administered, who completed it, overall risk, legal history, social history, pre-screen protective factor, and areas contributing to risk information.
   1. Select a YASI report, and the row will be highlighted in *blue*, and the information will auto-populate into the tabs.

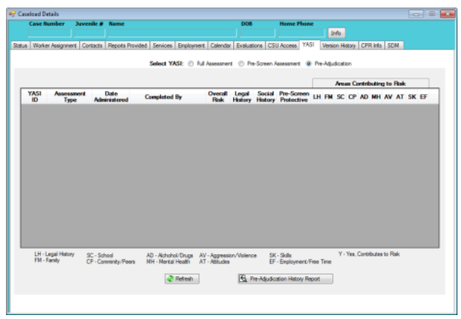


2. **Refresh Button**
    a. Click the **Refresh** button to ensure the most current information is being displayed.
3. **Pre-YASI History Report Button**
    a. The Pre-YASI History report lists the juvenile's pre-YASI history information. Click the **Pre-YASI History Button**, and the *Report Viewer* screen will appear, and the report will appear

c. **Pre-Adjudication Radio Button**

i. The **Pre-Adjudication** shows the YASI ID, assessment type, date administered, who completed it, overall risk, legal history, social history, pre-screen protective factor, and areas contributing to the risk.

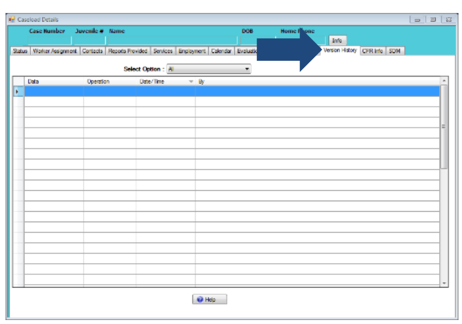
1. Select a YASI report, and the row will be highlighted in *blue*, and the information will auto-populate into the tabs.



2. **Refresh Button**
    a. Click the **Refresh** button to ensure the most current information is being displayed.
3. **Pre-Adjudication History Report Button**
    a. The Pre-Adjudication History report lists the juvenile's pre-adjudication history information. Click the **Pre-Adjudication History Button**, and the *Report Viewer* screen will appear, and the report will appear.

11. **Version History Tab**

This tab lists of the history of the tables edited or viewed in the Caseload Module and displays the data impacted, operation, date/time, and staff completing the action information.



a. **Select Option Drop-Down Menu**

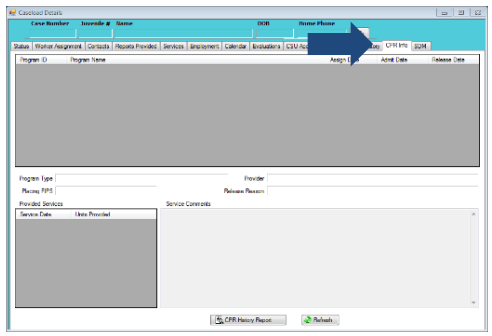
i. **All** will be displayed from the **Select Option** drop-down menu. Select an option from the drop-down menu and the information for the corresponding data element, or tab, will be displayed.

b. **Help Button**

i. Click the **Help** button and the ***Help*** screen will appear. The ***Help*** screen provides a description of the *Version History* tab.

12. **CPR Info Tab**

This tab provides a summary of information found in the Community Programs Reporting (CPR) system for services in which the juvenile was enrolled to including the program ID, program name, assigned date, admit date, release date, program type, provider, placing FIPS, release reason, service date, units provided, and service comments.



a. **CPR History Report Button**

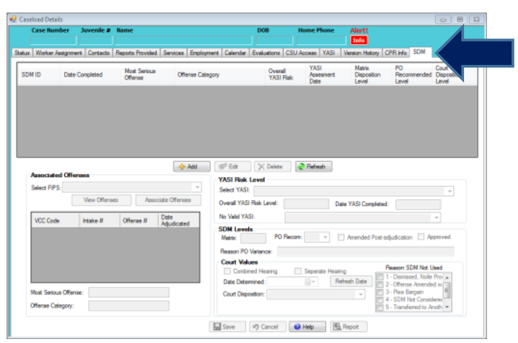
i. The **CPR History Report** lists the juvenile name, juvenile number, date of birth, program ID, program name, type, provider, placing FIPs, release reason, assign date, admission date, release date, service month, and units provided information for a specific juvenile. Click the **CPR History Report** button and the report will appear.

13. **SDM Tab**

This tab lists the SDM ID, date completed, most serious offense, offense category, overall YASI risk, YASI assessment date, matrix disposition level, PO recommended level, and court disposition level information.

The following charges are excluded from the SDM process: an offense less than a Class 1 misdemeanor (e.g., Class 2 misdemeanors), sex offenses (includes obscenity offenses), CHINS petitions, CHINSup petitions, violations of a court order (including contempt offenses), show cause petitions, failures to appear, violations of probation or parole, violations of protective orders, and charges filed through a summons. Juveniles being treated as an adult in circuit court are excluded from the SDM process.

After an SDM has been created in the system, supervisors have the ability to review and approve all SDM information.

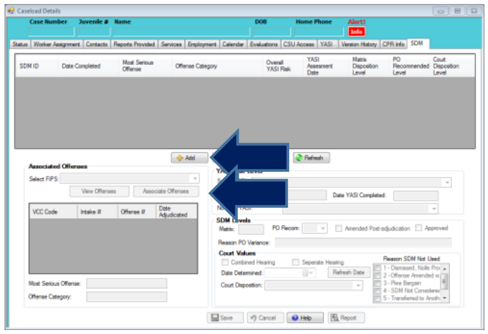


a. **Add Button**

i. To create a new SDM, click the **Add** button and the **Associated Offenses**, **YASI Risk Level**, **Disposition Levels**, and **Court Values** fields will become accessible.

1. **Associated Offenses**

a. To associate an offense, (i) select the appropriate FIPS from the **Select FIPS** drop-down menu, (ii) click the **Associate Offenses** button, and the ***Offense History*** screen will appear, (iii) place a checkmark in the **Associated** checkbox for the offense that is associated, click the (iv) **Save** button and (v) **Close** button, and you will return to the *Caseload Details* screen and the offense will be associated.

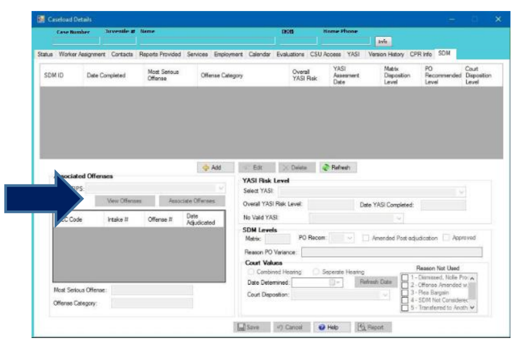


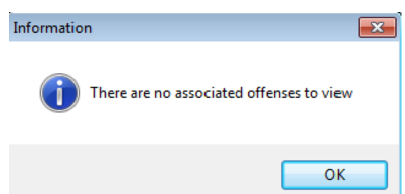
Refer to the [Offense History User Manual] on how to navigate the *Offense History* screen.

The **Most Serious Offense** field will be system-generated based on the offenses that are selected and associated with the SDM.

b. (i) Repeat the preceding steps for each offense that needs to be associated with the SDM, (ii) click the **Close** button when done, and the **Associated Offenses** table on the *SDM* tab will auto-populate associated offense information by VCC, intake and offense number, and date adjudicated (if entered), and the **Most Serious Offense** and **Offense Category** fields will auto-populate.
   i. Offenses where the adjudication is “Not Guilty”, “Dismissed”, “Nolle Prossed”, and “Withdrawn” will not show in the **Associated Offenses** box, and will not factor into the calculation for the SDM recommendation.
   ii. If an offense has already been associated with another SDM, a *Warning* screen will appear stating, “Offense Number XXX is already associated with SDM # XXX. You cannot associate an offense that is already associated with another SDM.”
   iii. If no qualifying offense has been associated, the **Offense Category** field will display “No qualified offenses.”

c. **View Offenses Button**
   i. To view associated offenses, (i) click the **View Offenses** button and the *Offense History* screen will appear.
      1. If there are no associated offenses for the juvenile record, the *Information* screen will appear stating, “There are no associated offenses to view.” Click the **OK** button.

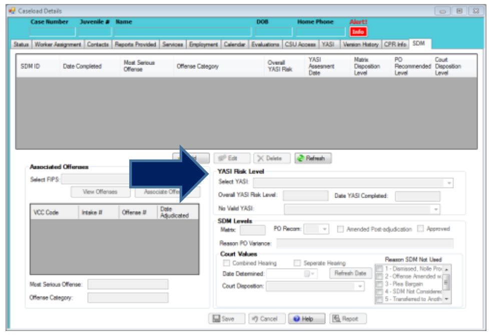




Refer to the [Offense History User Manual] on how to navigate the *Offense History* screen.

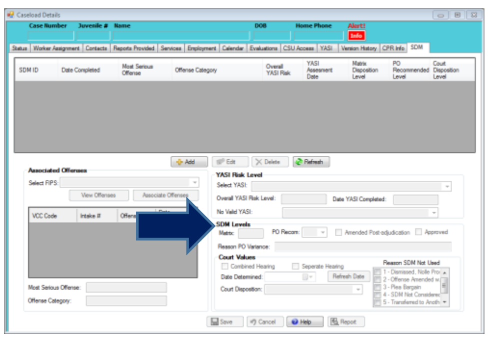
2. **YASI Risk Level**
   a. To add YASI risk level information, (i) click the **Select YASI** menu, (ii) select a **YASI** assessment from the drop-down menu, and the **Overall YASI Risk Level** and **Date YASI Completed** fields will auto-populate.
   b. If a valid YASI has not been saved in the system, (i) click the **No Valid YASI** drop-down menu, and (ii) select the appropriate option.

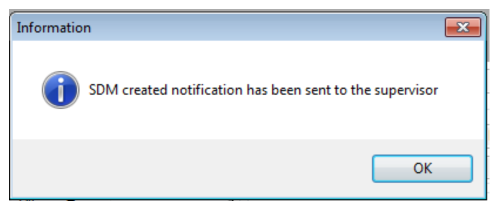
The **Overall YASI Risk Level** and **Date YASI Completed** fields will not be available for edits.



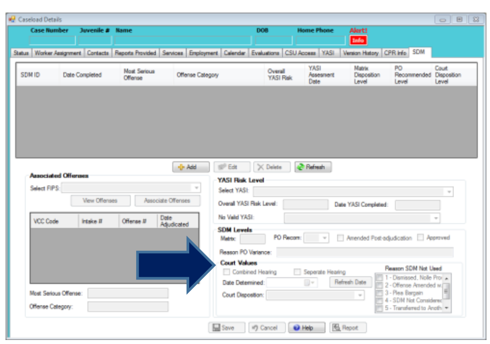
> The system will not allow the SDM to be saved until all mandatory fields are completed on the *SDM* tab. The following field will flash next to incomplete mandatory fields when attempting to save the record:

3. **SDM Levels**
   a. To add SDM Levels information after valid offenses and a YASI are associated with the SDM, (i) select the recommended disposition level from the **PO Recom** drop-down menu. The **Matrix** recommended disposition level will auto-populate. If the disposition level selected does not match the **Matrix** recommended, (ii) enter the reason in the **Reason PO Variance** field. A reason must be entered before the SDM can be saved. (iii) Click the **OK** button to continue.
      i. After saving the SDM, the *Information* screen will appear stating "SDM created notification has been sent to the supervisor." The email will only be sent when an SDM is created. An email notification will not be sent when an SDM is edited or deleted. Click the **OK** button to continue.





4. **Court Values**
   a. To add **Court Values** information on the *SDM* tab after completing the **Associated Offenses**, **YASI Risk Level**, and **SDM Levels** sections, click the **Add** button. If the hearing was combined or separate, place a checkmark in the **Combined Hearing** or **Separate Hearing** checkboxes.



> After a final disposition has been rendered, the PO should record the **Court Disposition**, **Date Determined**, and any other **Court Actions** (if applicable) in the SDM.

   b. Select a date from the **Date Determined** calendar field.
      i. When an SDM is initially created, the **Date Determined** calendar field will auto-populate with the earliest Disposition Date or Deferred Date recorded for the offenses associated with the SDM.
      ii. If a **Disposition Date** or **Deferred Date** are entered on the *Offense History* screen after the dispositional hearing, (i) click the **Refresh Date** button and the **Date Determined** calendar field will auto-populate with the earliest

Disposition Date or Deferred Date recorded for the offenses associated with the SDM.

iii. If subsequent changes are made to the **Disposition Date** or **Deferred Date** on the *Offense History* screen, click the **Refresh Date** button to update the **Date Determined** field.

c. (i) Click the **Court Disposition** drop-down menu, (ii) select the appropriate option, and (iii) click the **Save** button.

i. If "**7 – Other Disposition**" is selected for the **Court Disposition**, the **Other** textbox will appear. Enter the other disposition into the textbox before saving the SDM.

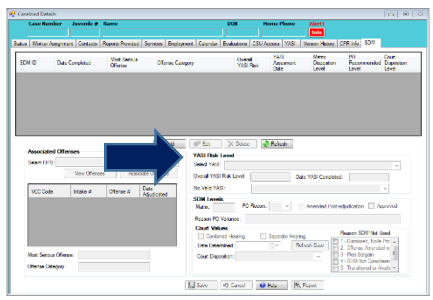
ii. If "**8 – SDM Not Used**" is selected for the **Court Disposition**, at least one checkbox in the **Reason Not Used** field must be checked. Multiple reasons can be checked.

d. **Edit Button**

2. **Edit SDM**

i. (i) Select an SDM, and the row will be highlighted in *blue*, and the information will auto-populate into the tabs, and (ii) click the **Edit** button. If a supervisor has yet to approve the SDM, the **Associated Offenses**, **YASI Risk Level**, **Disposition Levels**, and **Court Values** fields will become accessible. If a supervisor has approved the SDM, the **Associated Offenses**, **YASI Risk Level**, and **Disposition Levels** fields will not be accessible to the staff that created the SDM. (iii) Edit the information and (iv) click the **Save** button.

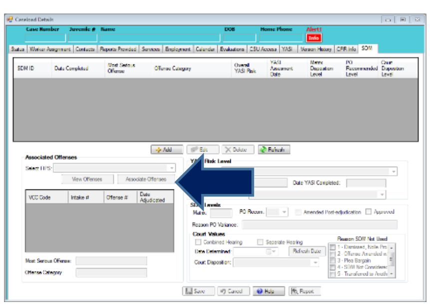
Clicking on the **Associate Offenses** button after saving an SDM record will prompt a warning to appear stating that the existing associated offense information related to the selected SDM will be deleted if the user proceeds.

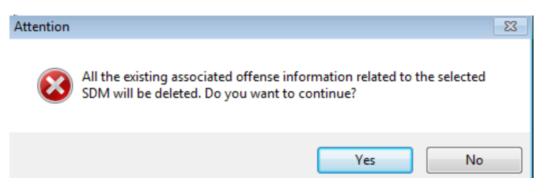


1. **Edit Associated Offenses**

i. (i) Click on the **Associated Offenses** button the *Attention* screen will appear stating that if you proceed, "All the existing associated offense information related to the selected SDM will be deleted. Do you want to continue?" (ii) Click the **Yes** button if you wish to continue or click the **No** button to cancel.

ii. If you proceed, the *Offense History* screen will appear, (i) edit the information and (ii) click the **Save** button.

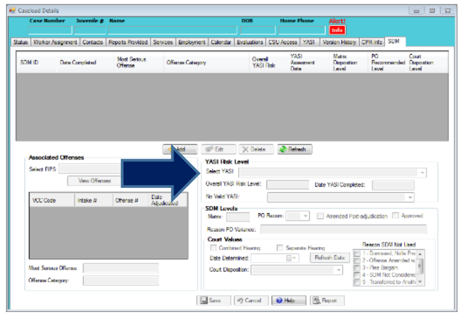




Refer to the Offense History User Manual on how to navigate the *Offense History* screen.

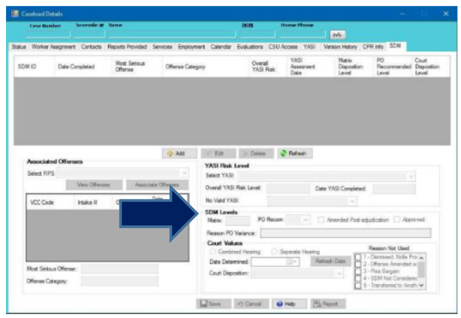
3. **Edit YASI Risk Level**

i. (i) Select a YASI from the **Select YASI** drop-down menu, (ii) edit the information, and (iii) click the **Save** button.

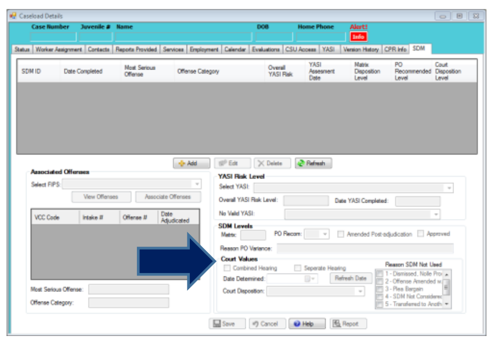


If the SDM is being edited following a combined hearing, and the SDM has changed, make sure to check the **Amended Post-adjudication** checkbox in the **SDM Levels** section.

4. **Edit SDM Levels**
   i. (i) Select the recommended disposition level from the **PO Recom** drop-down menu, (ii) edit the information, and (iii) click the **Save** button.
   ii. If the SDM was amended post-adjudication, (i) check the **Amended Post-adjudication** checkbox, and (ii) click the **Save** button.
   iii. If the SDM is approved, (i) check the **Approved** checkbox, and (ii) click the **Save** button.



5. **Edit Court Values**
   1. Place a checkmark in the **Combined Hearing** or **Separate Hearing** checkboxes.

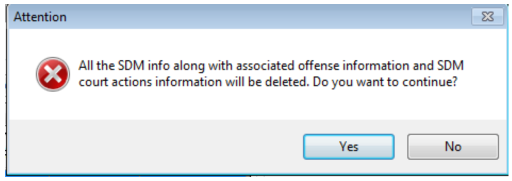


   2. Select a date from the **Date Determined** calendar field.
      a. When an SDM is initially created, the **Date Determined** calendar field will auto-populate with the earliest Disposition Date or Deferred Date recorded for the offenses associated with the SDM.
      b. If a **Disposition Date** or **Deferred Date** are entered on the *Offense History* screen after the dispositional hearing, (i) click the **Refresh Date** button and the **Date Determined** calendar field will auto-populate with the earliest Disposition Date or Deferred Date recorded for the offenses associated with the SDM.
      c. If subsequent changes are made to the **Disposition Date** or **Deferred Date** on the *Offense History* screen, click the **Refresh Date** button to update the **Date Determined** field.
   3. (i) Select a disposition from the **Court Disposition** drop-down menu and (ii) click the **Save** button.
      a. If "**7 – Other Disposition**" is selected for the **Court Disposition**, the **Other** textbox will appear. Enter the other disposition into the textbox before saving the SDM.

b. If "**8 – SDM Not Used**" is selected for the **Court Disposition**, at least one checkbox in the **Reason Not Used** field must be checked. Multiple reasons can be checked.

e. **Delete Button**

i. To delete an SDM, (i) select an SDM, and the row will be highlighted in *blue*, (ii) click the **Delete** button, and the *Attention* screen will appear stating "All the SDM info along with associated offense information and SDM court actions information will be deleted. Do you want to continue?" (iii) Click the **Yes** button to continue and delete the SDM data, or click the **No** button to continue without deleting the SDM record data.



f. **Refresh Button**

i. Click the **Refresh** button to ensure the most current information is being displayed.

g. **Cancel Button**

i. Click the **Cancel** button to continue without saving changes on the *SDM* tab.

h. **Help Button**

i. Click the **Help** button and the *Help* screen will appear with *SDM* tab business rules.

i. **Report Button**

i. The **SDM** report displays the juvenile name, date of birth, juvenile number, Matrix and PO recommended level information, and offenses. Click the **Report** button to open the *Report Viewer* screen and the report will appear.

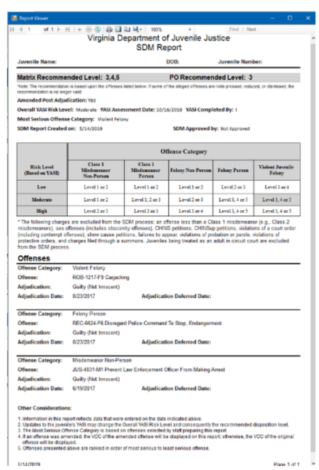
Staff reviewing SDM data will click on the **View Offenses** button to ensure that the correct offenses are associated.

Reviewing and Approving an SDM

When an SDM is created, the supervisor will be sent an email notification. At this point, the supervisor will access the record to review and approve the SDM.

1. (i) Select the desired SDM that you would like to review and approve, and the row will be highlighted in *blue*, (ii) click the **Edit** button on the SDM tab, and (iii) edit the information. If the SDM is approved, place a checkmark in the **Approved** checkbox. (iv) Click the **Save** button.

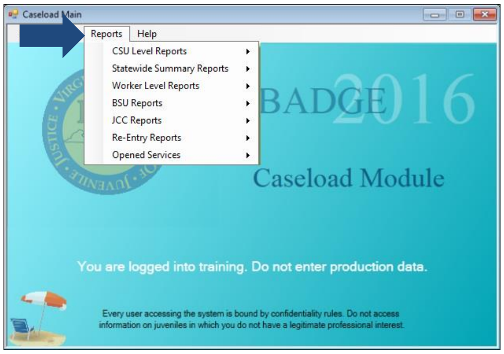
The **Reason PO Recommended Variance** and **Reason Matrix Not Used** fields will only be visible on the SDM report if data have been entered in those fields.



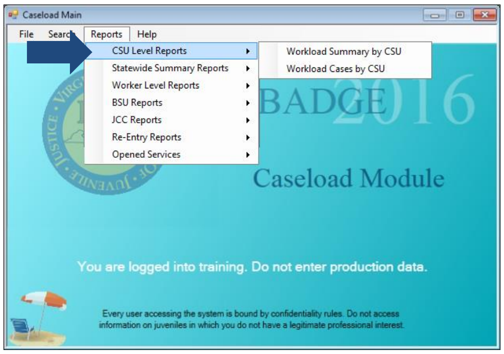
Refer to the Edit Button section on how to edit an SDM.

Reports

This menu provides users with various reports on different levels. From the *Caseload Main* screen, (i) click the **Reports** menu, and (ii) select a report.

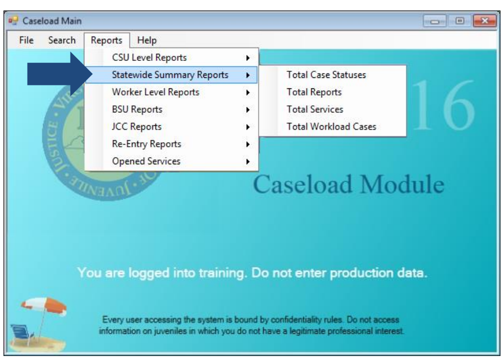


CSU Level Reports



1. **Workload Summary by CSU**
    a. The **Workload Summary by CSU** report lists the count of cases by status and services. (i) Click the **CSU Level Reports** menu, (ii) select the **Workload Summary by CSU** option from the drop-down menu, and the *Workload Summary By CSU* screen will appear, select the (iii) **Begin Date** and (iv) **End Date** from the calendar screens. The **Worker** field will not be accessible. (v) Select the **Facility** from the drop-down menu. The **Sort By** field will not be accessible. (vi) Click the **Generate** button, and the report will appear.
2. **Workload Cases by CSU**
    a. The **Workload Cases** report lists the juvenile number, name, date of birth, race, case status, worker name, and worker phone number information for open cases. (i) Click the **CSU Level Reports** menu, (ii) select the **Workload Cases by CSU** option from the drop-down menu, and the *Workload Summary By CSU* screen will appear, and the **Begin Date**, **End Date**, and the **Worker** fields will not be accessible, (iii) select the **Facility** from the drop-down menu, and the **Sort By** field will not be accessible, (iv) click the **Generate** button, and the report screen will appear.

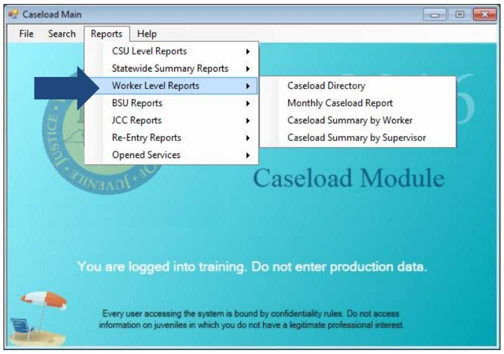
Statewide Summary Reports



1. **Total Case Statuses**
   a. The **Total Case Statuses** report lists open statuses, closed statuses, and active statuses information by region and district. (i) Click the **Statewide Summary Reports** menu, (ii) select the **Total Case Statuses** option from the drop-down menu, and the *Total Case Statuses* screen will appear, and select the (iii) **Begin Date** and (iv) **End Date** from the calendar screens. The **Worker**, **Facility**, and **Sort By** fields will not be accessible. (v) Click the **Generate** button and the report will appear.
2. **Total Reports**
   a. The **Total Workload Reports Completed by Region and CSU** report lists the number of various report types by region and district. (i) Click the **Statewide Summary Reports** menu, (ii) select the **Total Reports** option from the drop-down menu, and the *Total Reports* screen will appear, and select the (iii) **Begin Date** and (iv) **End Date** from the calendar screens. The **Worker**, **Facility**, and **Sort By** fields will not be accessible. (v) Click the **Generate** button and the report will appear.
3. **Total Services**
   a. The **Total Workload Cases Opened, Closed, and Active By Service** report lists the number of open, closed, and active cases by various service types and by region and district. (i) Click the **Statewide Summary Reports** menu, (ii) select the **Total Services** option from the drop-down menu, and the *Total Services* screen will appear, and select the (iii) **Begin Date** and (iv) **End Date** from the calendar screens. The **Worker**, **Facility**, and **Sort By** fields will not be accessible. (v) Click the **Generate** button and the report will appear.
4. **Total Workload Cases**
   b. The **Total Workload Cases Opened, Closed, and Active** report lists the number of opened, closed, and active cases by region, district, and locality. (i) Click the **Statewide Summary Reports** menu, (ii) select the **Total Workload Cases** option from the drop-down menu, and the *Total Workload Cases* screen will appear, and select the (iii) **Begin Date** and (iv) **End Date** from the calendar screens. The **Worker**, **Facility**, and **Sort By** fields will not be accessible. (v) Click the **Generate** button and the report will appear.

Worker Level Reports

For Worker Level reports, the **Facility** field will auto-populate, but the drop-down menu will list the facilities the user was previously assigned to.



1. **Caseload Directory**
   a. The **Caseload Directory for Cases Assigned To** report lists the juvenile's name, date of birth, address, phone numbers, caseload numbers, and contact information. (i) Click the **Worker Level Reports** menu, (ii) select the **Caseload Directory** option from the drop-down menu, and the *Caseload Directory* screen will appear. The **Begin Date** and **End Date** fields will not be accessible. The **Worker** field will auto-populate. If you would like to change the **Worker**, click the **Change User** button. The **Facility** field will auto-populate. If you would like to change the **Facility**, select an option from the drop-down menu, if applicable. The **Sort by** field will not be accessible. (iv) Click the **Generate** button and the report will appear.

Refer to the Change User section on how to navigate the **Change User** button.

2. **Monthly Caseload Report**
   a. The **Workload Report** lists the names of the juveniles/adult case assigned to the worker, active case statuses, open services, and completed reports, the start date, end date, and closed date information. (i) Click the **Worker Level Reports**, (ii) select the **Monthly Caseload Report** option from the drop-down menu, and the _Monthly Workload Report_ screen will appear, select the (iii) **Begin Date** and (iv) **End Date** from the calendar screens, and the **Worker** field will auto-populate. If you would like to change the **Worker**, click the **Change User** button. If you would like to search for all the workers at the facility, click the **All** checkbox. The **Facility** field will auto-populate. If you would like to change the **Facility**, select an option from the drop-down menu, if applicable. The **Sort By** field will not be accessible. (v) Click the **Generate** button and the report will appear.

   Refer to the Change User section on how to navigate the **Change User** button.

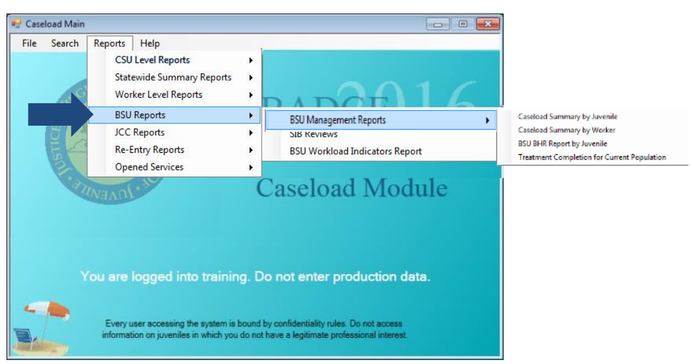
3. **Caseload Summary by Worker**
   a. The **Workload Summary** report lists the number of statutes, reports, services, contact types, contacted by, person contacted, contacted place, contact purpose, and other information recorded by a worker during the specified timeframe. (i) Click the **Worker Level Reports** menu, (ii) select the **Caseload Summary by Worker** option from the drop-down menu, and the _Workload Summary by Worker_ screen will appear, select the (iii) **Begin Date** and (iv) **End Date** from the calendar screens, and the **Worker** field will auto-populate. If you would like to change the **Worker**, click the **Change User** button. The **Facility** field will auto-populate. If you would like to change the **Facility**, select an option from the drop-down menu, if applicable. The **Sort By** field will not be accessible. (v) Click the **Generate** button and the report will appear.

   Refer to the Change User section on how to navigate the **Change User** button.

4. **Caseload Summary by Supervisor**
   a. The **Workload Summary** report lists the number of statutes, reports, services, contact types, contacted by, person contacted, contacted place, contact purpose, and other information recorded by the supervision staff during the specified timeframe. (i) Click the **Worker Level Reports** menu, (ii) select the **Caseload Summary by Supervisor** option from the drop-down menu, and the _Workload Summary by Supervisor_ screen will appear, select the (iii) **Begin Date** and (iv) **End Date** from the calendar screens, and the **Worker** field will auto-populate. If you would like to change the **Worker**, click the **Change User** button. The **Facility** field will auto-populate. If you would like to change the **Facility**, select an option from the drop-down menu, if applicable. The **Sort By** field will not be accessible. (v) Click the **Generate** button and the report will appear.

   Refer to the Change User section on how to navigate the **Change User** button.

BSU Reports

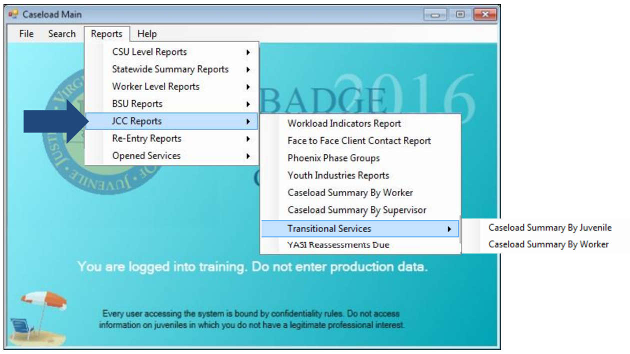


1. **BSU Management Reports**
   a. **Caseload Summary by Juvenile**
      i. The **BSU Caseload by Juvenile and Facility** report lists the juveniles receiving contacts or services during the specified timeframe by facility and count of the sessions. (i) Click the **BSU Reports** menu, (ii) click the **BSU Management Reports** menu, (iii) select the **Caseload Summary by Juvenile** option from the drop-down menu, and the *BSU Caseload Summary by Juvenile Report* screen will appear, and select the (iv) **Begin Date** and (v) **End Date** from the calendar screens. The **Worker**, **Facility**, and **Sort By** fields will not be accessible. (vi) Click the **Generate** button and the report will appear.
   b. **Caseload Summary by Worker**
      i. The **BSU Caseload by Juvenile and Facility** report lists the number of the juvenile's contacts and BSU related sessions. (i) Click the **BSU Reports** menu, (ii) click the **BSU Management Reports** menu, (iii) select the **Caseload Summary by Worker** option from the drop-down menu, and the *BSU Caseload Summary by Worker Report* screen will appear, and select the (iv) **Begin Date** and (v) **End Date** from the calendar screens. The **Worker**, **Facility**, and **Sort By** fields will not be accessible. (vi) Click the **Generate** button and the report will appear.
   c. **BSU BHR Report by Juvenile**
      i. The **BSU BHR Report by Juvenile** report lists the service type, service event, worker information, service event comments, confidential notes, and the date for the selected juvenile. (i) Click the **BSU Reports** menu, (ii) click the **BSU Management Reports** menu, (iii) select the **BSU BHR Report by Juvenile** option from the drop-down menu, and the *BSU BHR Report By Juvenile* screen will appear, select the (iv) **Begin Date** and (v) **End Date** from the calendar screens, (vi) click the **Search** button, and the *Find Juvenile* screen will appear. (vii) Search for a juvenile, (viii) click the **Find** button, and the *Search Results* screen will appear, (ix) select a juvenile, and the row will be highlighted in *blue*, (x) click the **Select** button, and the **Juvenile Number** and **Name** will appear, (xi) click the **Generate** button, and the report will appear.

Refer to the Login & Search User Manual on how to search for a juvenile.

   d. **Treatment Completion for Current Population**
      i. The **Treatment Completion Data for Current Population** report lists the juvenile's name, juvenile number, arrived date, and treatment completion information by facility. (i) Click the **BSU Reports** menu, (ii) click the **BSU Management Reports** menu, (iii) select the **Treatment Completion for Current Population** option from the drop-down menu, and the report will appear.
2. **SIB Reviews**
   a. The **Self Injurious Behavior Review** report lists the juvenile's name, date the SIB alert was initiated, if the juvenile is on medication, prior SIB information, end date, and the review date by the level of SIB and facility. (i) Click the **BSU Reports** menu, (ii) select the **SIB Reviews** option from the drop-down menu, and the report will appear.
3. **BSU Workload Indicators Report**
   a. The **Workload Indicators Report** lists the number of different types of services, visitors, vocational and education activities, staff activities, transportation and video conferences. (i) Click the **BSU Reports** menu, (ii) select the **BSU Workload Indicators Report** option from the drop-down menu, and the *Workload Indicators Report for BSU* screen will appear, (iii) select the **Year** by clicking the up and down arrows, (iv) select the **JCC** from the drop-down menu, (v) click the **Generate** button, and the report will appear.

JCC Reports



1. **Workload Indicators Report**
   a. The **Workload Indicators Report** lists population-related information, the number of resident grievances/offenses, and combined treatment services information. (i) Click the **JCC Reports** menu, (ii) select the **Workload Indicators Report** option from the drop-down menu, and the *Workload Indicators Report* screen will appear, (iii) select the **Year** by clicking the up and down arrows, (iv) select the **JCC** from the drop-down menu, (v) click the **Generate** button, and the report will appear.
2. **Face to Face Client Contact Report**
   a. The **Resident Face to Face Contacts Report** lists the juvenile's name and the last date the worker had a face-to-face contact with the juvenile. (i) Click the **JCC Reports** menu, (ii) select the **Face to Face Client Contact Report** option from the drop-down menu, and the *JCC Face to Face Client Contact Report* screen will appear, select the (iii) **Begin Date** and (iv) **End Date** from the calendar screens, and the **Worker** field will auto-populate. If you would like to change the **Worker**, click the **Change User** button. The **Sort By** field will not be accessible. (v) Click the **Generate** button and the report will appear.

   Refer to the Change User section on how to navigate the **Change User** button.

3. **Phoenix Phase Groups**
   a. The **Phoenix Phase Groups** report lists the facility, service date, service, service event, and the name of Worker 1, Work 2, and/or Worker 3 (if applicable). (i) Click the **JCC Reports** menu, (ii) select the **Phoenix Phase Groups** option from the drop-down menu, and the *Phoenix Phase Groups* screen will appear, select the (iii) **Begin Date** and (iv) **End Date** from the calendar screens, (v) click the **Search** button, and the *Find Juvenile* screen will appear. (vi) Search for a juvenile, (vii) click the **Find** button, and the *Search Results* will appear, (viii) select a juvenile, and the row will be highlighted in *blue*, (ix) click the **Select** button, and the **Juvenile Number** and **Name** will appear, (x) click the **Generate** button, and the report will appear.

   Refer to the Login & Search User Manual on how to search for a juvenile.

4. **Youth Industries Reports**
   a. The **Youth Industries Reports** consist of the juvenile's timesheets, workload information, COMSTAT report, or the juvenile's recidivism information. (i) Click the **JCC Reports** menu, (ii) select the **Youth Industries Report** option from the drop-down menu, and the *Youth Industries Reports* screen will appear, (iii) select the **Report Type** from the drop-down menu, select the (iv) **Begin Date** and (v) **End Date** from the calendar screens, (vii) click the **Run** button, and the selected report will appear.

5. **Caseload Summary By Worker**
    a. The **Workload Summary** report lists the number of contact by, place, purpose, type, reports, service events and other information. (i) Click the **JCC Reports** menu, (ii) select the **Caseload Summary By Worker** option from the drop-down menu, and the _Workload Summary By Worker_ screen will appear, select the (iii) **Begin Date** and (iv) **End Date** from the calendar screens, and the **Worker** field will auto-populate. If you would like to change the **Worker**, click the **Change User** button. The **Facility** and **Sort By** fields will not be accessible. (v) Click the **Generate** button and the report will appear.

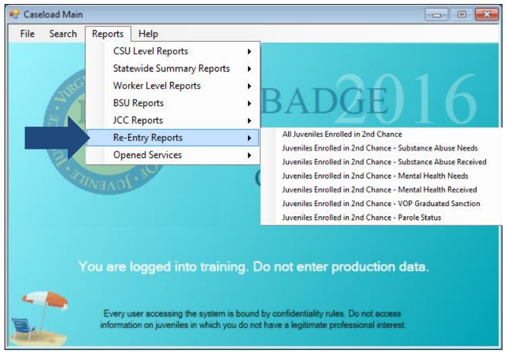
    Refer to the Change User section on how to navigate the **Change User** button.

6. **Caseload Summary By Supervisor**
    a. The **Supervisor Summary** report lists the number of contact by, place, purpose, type, reports, service events and other information. (i) Click the **JCC Reports** menu, (ii) select the **Caseload Summary By Supervisor** option from the drop-down menu, and the _Workload Summary By Supervisor_ screen will appear, select the (iii) **Begin Date** and (iv) **End Date** from the calendar screens, and the **Worker** field will auto-populate. If you would like to change the **Worker**, click the **Change User** button. The **Facility** and **Sort By** fields will not be accessible. (v) Click the **Generate** button and the report will appear.

    Refer to the Change User section on how to navigate the **Change User** button.

7. **Transitional Services**
    a. **Caseload Summary By Juvenile**
        i. The **Transitional Services Caseload by Juvenile and Facility** report lists the various sessions and contacts for juveniles by facilities. (i) Click the **JCC Reports** menu, (ii) click the **Transitional Services** menu, (iii) select the **Caseload Summary By Juvenile** from the drop-down menu, and the _Transitional Services Caseload Summary by Juvenile Report_ screen will appear, and select the (iv) **Begin Date** and (v) **End Date** from the calendar screens. The **Worker**, **Facility,** and **Sort By** fields will not be accessible. (vi) Click the **Generate** button and the report will appear.
    b. **Caseload Summary By Worker**
        i. The **Transitional Services Events Summary** report lists the juvenile's name, session type, and total count of sessions for each juvenile. (i) Click the **JCC Reports** menu, (ii) click the **Transitional Services** menu, (iii) select the **Caseload Summary By Worker** option from the drop-down menu, and the _Transitional Services Caseload Summary by Worker Report_ screen will appear, and select the (iv) **Begin Date** and (v) **End Date** from the calendar screens, and the **Worker** field will auto-populate. If you would like to change the **Worker**, click the **Change User** button. The **Facility** and **Sort By** fields will not be accessible. (vi) Click the **Generate** button and the report will appear.
8. **YASI Reassessments Due**
    a. The **YASI Reassessments Due for Committed Juveniles** report lists the juvenile number, juvenile name, early release date, last assessment date, the next assessment due date, and the number of days until the next assessment is due. (i) Click the **JCC Reports** menu, (ii) select the **YASI Reassessments Due** option from the drop-down menu, and the _YASI Reassessments Due_ screen will appear. The **Begin Date** and **End Date** fields will not be accessible. (iii) Select the **JCC** from the drop-down menu. The **Sort By** field will not be accessible. (iv) Click the **Generate** button and the report will appear.

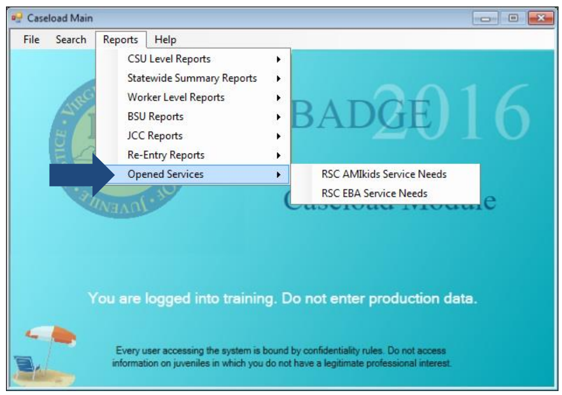
Re-Entry Reports



1. **All Juveniles Enrolled in 2nd Chance**
    a. The report lists the juvenile number, name, begin date, end date, and closed code (if applicable). (i) Click the **Re-Entry Reports** menu, (ii) select the **All Juvenile Enrolled in 2nd Chance** option from the drop-down menu, and the *All Juveniles Enrolled in 2nd Chance* screen will appear, and select the (iii) **Begin Date** and (iv) **End Date** from the calendar screens. The **Worker** and **Facility** fields will not be accessible. (v) Select the **Sort By** option from the drop-down menu, (vi) click the **Generate** button, and the report will appear.
2. **Juveniles Enrolled in 2nd Chance – Substance Abuse Needs**
    a. The report lists the juvenile number, name, begin date, and end date (if applicable) by status (mandatory, recommended, and not applicable/not indicated). (i) Click the **Re-Entry Reports** menu, (ii) select the **Juveniles Enrolled in 2nd Chance – Substance Abuse Needs** option from the drop-down menu, and the *Juveniles Enrolled in 2nd Chance – Substance Abuse Needs* screen will appear, and select the (iii) **Begin Date** and (iv) **End Date** from the calendar screens. The **Worker**, **Facility**, and **Sort By** fields will not be accessible. (v) Click the **Generate** button and the report will appear.
3. **Juveniles Enrolled in 2nd Chance – Substance Abuse Received**
    a. The report lists the juvenile number, name, grants begin and end date, service type, and service begin and end date. (i) Click the **Re-Entry Reports** menu, (ii) select the **Juveniles Enrolled in 2nd Chance – Substance Abuse Received** option from the drop-down menu, and the *Juveniles Enrolled in 2nd Chance – Substance Abuse Received* screen will appear, and select the (iii) **Begin Date** and (iv) **End Date** from the calendar screens. The **Worker**, **Facility**, and **Sort By** fields will not be accessible. (v) Click the **Generate** button and the report will appear.
4. **Juveniles Enrolled in 2nd Chance – Mental Health Needs**
    a. The report lists the juvenile number, name, grants begin and end date, and screenings begin and end date. (i) Click the **Re-Entry Reports** menu, (ii) select the **Juveniles Enrolled in 2nd Chance – Mental Health Needs** option from the drop-down menu, and the *Juveniles Enrolled in 2nd Chance – Mental Health Needs* screen will appear, and select the (iii) **Begin Date** and (iv) **End Date** from the calendar screens. The **Worker**, **Facility**, and **Sort By** fields will not be accessible. (v) Click the **Generate** button and the report will appear.
5. **Juveniles Enrolled in 2nd Chance – Mental Health Received**
    a. The report lists the juvenile number, name, grant begin and end date, service type, service being and end date. (i) Click the **Re-Entry Reports** menu, (ii) select the **Juveniles Enrolled in 2nd Chance – Mental Health Received** option from the drop-down menu, and the *Juveniles Enrolled in 2nd Chance – Mental Health Received* screen will appear, and select the (iii) **Begin Date** and (iv) **End Date** from the calendar screens. The **Worker**, **Facility**, and **Sort By** fields will not be accessible. (v) Click the **Generate** button and the report will appear.

6. **Juveniles Enrolled in 2nd Chance – VOP Graduated Sanction**
    a. The report lists the juvenile number, name, grants begin and end date, and graduated sanction begin and end date. (i) Click the **Re-Entry Reports** menu, (ii) select the **Juvenile Enrolled in 2nd Chance – VOP Graduated Sanction** option from the drop-down menu, and the *Juveniles Enrolled in 2nd Chance – VOP Graduated Sanction* screen will appear, and select the (iii) **Begin Date** and (iv) **End Date** from the calendar screens. The **Worker**, **Facility**, and **Sort By** fields will not be accessible. (v) Click the **Generate** button and the report will appear.
7. **Juveniles Enrolled in 2nd Chance – Parole Status**
    a. The report lists the juvenile number, name, grants begin and end date, parole status, parole statuses begin and end date, and closed code. (i) Click the **Re-Entry Reports** menu, (ii) select the **Juvenile Enrolled in 2nd Chance – Parole Status** option from the drop-down menu, and the *Juveniles Enrolled in 2nd Chance – Parole Status* screen will appear, and select the (iii) **Begin Date** and (iv) **End Date** from the calendar screens. The **Worker**, **Facility**, and **Sort By** fields will not be accessible. (v) Click the **Generate** button and the report will appear.

Opened Services



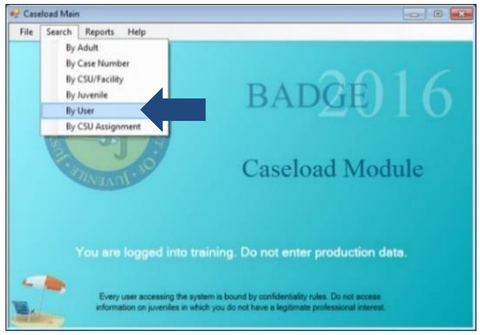
1. **RSC AMIkids Services Needs**
    a. The report lists the juvenile number, juvenile's name, date service keyed, and date serviced opened. (i) Click the **Opened Services** menu, (ii) select the **RSC AMIkids Service Needs** option from the drop-down menu, and the report will appear.
2. **RSC EBA Service Needs**
    a. The report lists the juvenile number, juvenile's name, date service keyed, and date serviced opened. (i) Click the **Opened Services** menu, (ii) select the **RSC EBA Service Needs** option from the drop-down menu, and the report will appear.

Appendix A

In order to change the supervisor assigned to a case from the *Caseload Main* screen:

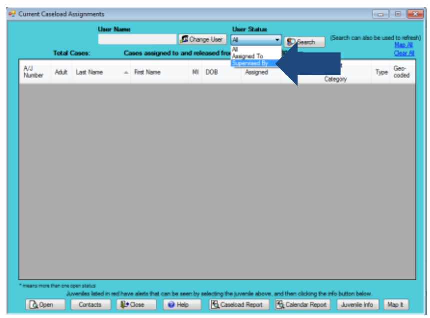
- Any user can change the assigned supervisor in BADGE. Refer to your local procedure for additional guidance.

1. (i) Click the **Search** menu, (ii) select **By User** from the drop-down menu, and the *Current Caseload Assignments* screen will appear.

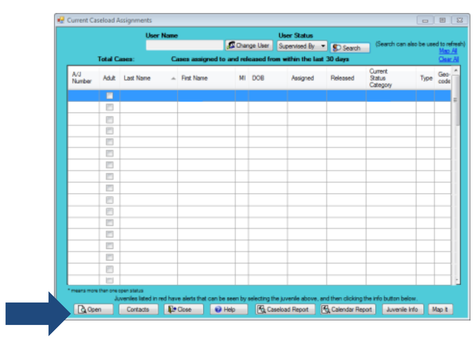


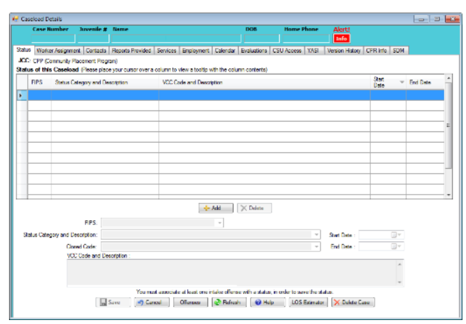
- The **User Name** will default to your name.
- The cases that are listed have been assigned to and released from your caseload within the last 30 days.

2. The **User Name** field will default to your name. (i) Select **Supervised By** from the **User Status** drop-down menu and (ii) click the **Search** button.

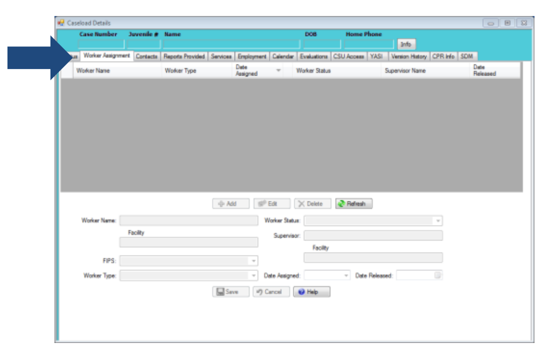


3. (i) Select a case, and the row will be highlighted in *blue*, (ii) click the **Open** button, and the *Caseload Details* screen will appear.

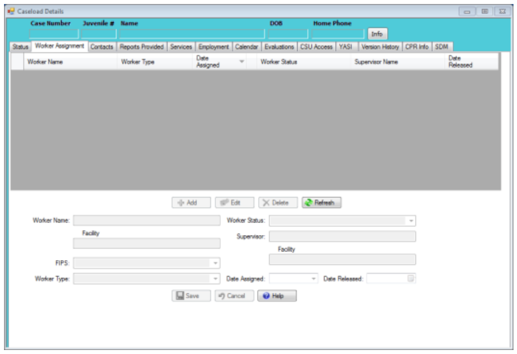
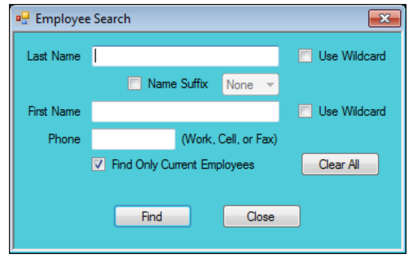




4. (i) Click the *Worker Assignment* tab, (ii) select a worker's name, and the row will be highlighted in *blue*, (ii) click the **Edit** button, (iii) select the **Date Released** from the calendar screen, and (iv) click the **Save** button.

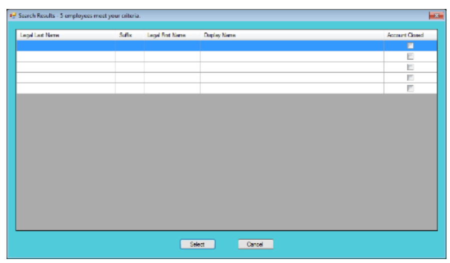


5. (i) Click the **Add** button, and the fields at the bottom of the screen will become accessible, (ii) click the **Change User** button next to the **Worker Name** field, and the *Employee Search* screen will appear.

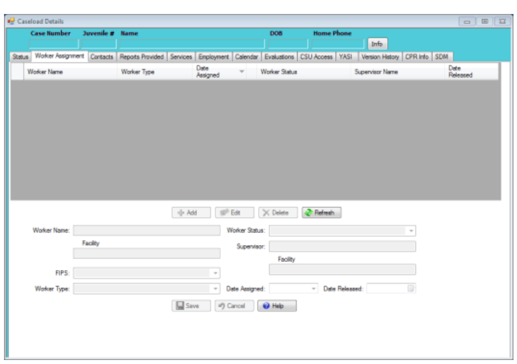
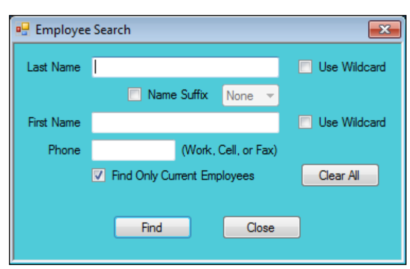
   a. Type the **Last Name**.
   b. Click the **Use Wildcard** checkbox and the employee search will match any character or sequence of characters that you put in the **Last Name** field.
   c. Click the **Name Suffix** checkbox in order to select a suffix from the drop-down menu.
   d. Type the **First Name**.
   e. Click the **Use Wildcard** checkbox and the employee search will match any character or sequence of characters that you put in the **First Name** field.
   f. Search using the employee's work, cell, or fax number by typing it into the **Phone** textbox.
   g. The **Find Only Current Employees** checkbox will be selected automatically. If you would like to include former employees in your search results, uncheck this checkbox.
   h. Click the **Find** button and the *Search Results* screen will appear.

In order to yield broader search results, type ONLY two or three characters of the last and first name and, select **Use Wildcard**.



   i. (i) Select an employee's name, and the row will be highlighted in *blue*, (ii) click the **Select** button, and the selected name will auto-populate into the **Worker** field on the *Caseload Details* screen.

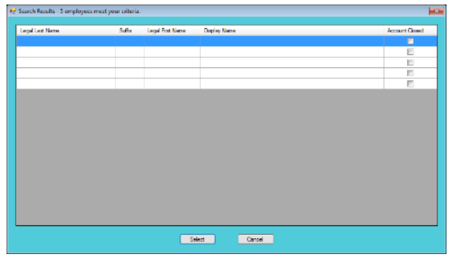
6. Select the (ii) **FIPS**, (iii) **Worker Type**, and (iv) **Worker Status** from the drop-down menus, (v) click the **Change User** button next to the **Supervisor** field, and the *Employee Search* screen will appear.

   a. Type the **Last Name**.
   b. Click the **Use Wildcard** checkbox and the employee search will match any character or sequence of characters that you put in the **Last Name** field.

> In order to yield broader search results, type ONLY two or three characters of the last and first name and, select **Use Wildcard**.

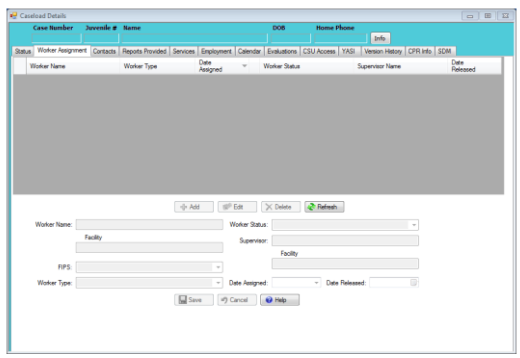
c. Click the **Name Suffix** checkbox in order to select a suffix from the drop-down menu.
d. Type the **First Name**.
e. Click the **Use Wildcard** checkbox and the employee search will match any character or sequence of characters that you put in the **First Name** field.
f. Search using the employee's work, cell, or fax number by typing it into the **Phone** textbox.
g. The **Find Only Current Employees** checkbox will be selected automatically. If you would like to include former employees in your search results, uncheck this checkbox.
h. Click the **Find** button and the _Search Results_ screen will appear.



> When a juvenile is released from direct care, the assigned workers and supervisors will receive an email notification.

i. (i) Select an employee's name, and the row will be highlighted in *blue*, (ii) click the **Select** button, and the selected name will auto-populate into the **Supervisor** field on the _Caseload Details_ screen.

7. (i) Select the **Date Assigned** from the calendar screen and (ii) click the **Save** button.

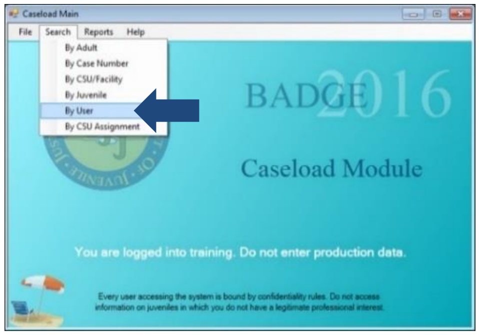


Appendix B

In order to change the worker assigned to a case from the *Caseload Main* screen:

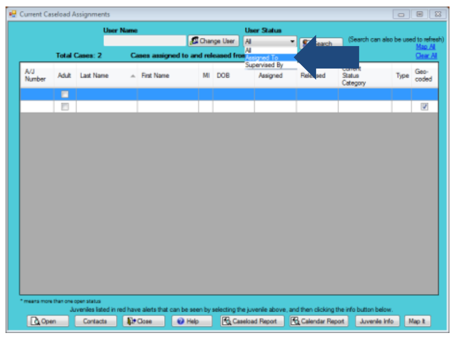
- Any user can change the assigned worker in BADGE. Refer to your local procedure for additional guidance.

1. (i) Click the **Search** menu, (ii) select **By User** from the drop-down menu, and the *Current Caseload Assignments* screen will appear.

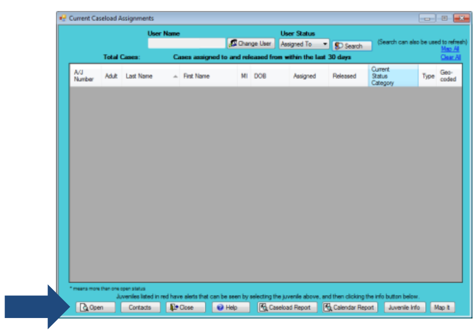


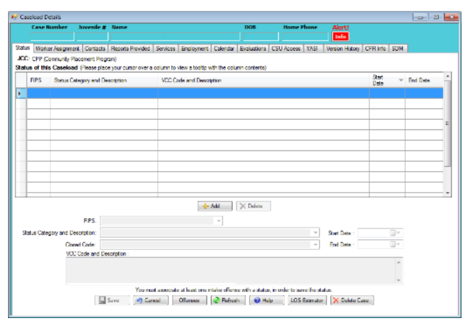
- The **User Name** will default to your name.
- The cases that are listed have been assigned to and released from your caseload within the last 30 days.

2. The **User Name** field will default to your name. (i) Select **Assigned To** from the **User Status** drop-down menu and (ii) click the **Search** button.

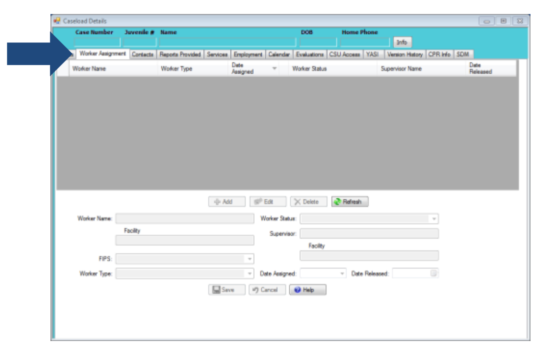


3. (i) Select a case, and the row will be highlighted in *blue*, (ii) click the **Open** button, and the *Caseload Details* screen will appear.

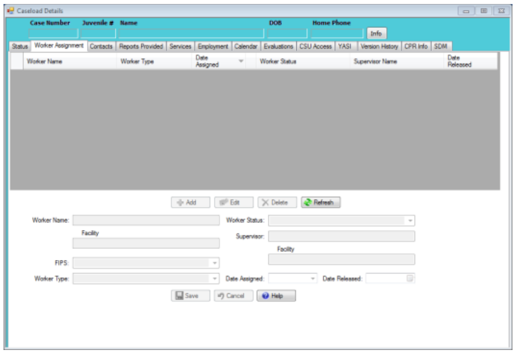


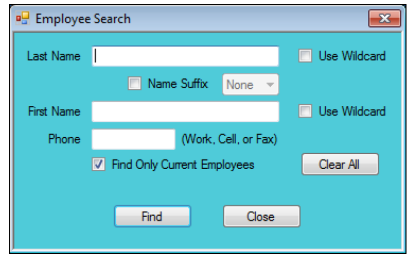


4. (i) Click the *Worker Assignment* tab, (ii) select a worker's name, and the row will be highlighted in *blue*, (ii) click the **Edit** button, (iii) select the **Date Released** from the calendar screen, and (iv) click the **Save** button.



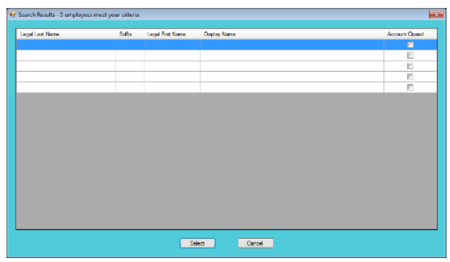
5. (i) Click the **Add** button, and the fields at the bottom of the screen will become accessible, (ii) click the **Change User** button, and the *Employee Search* screen will appear.





In order to yield broader search results, type ONLY two or three characters of the last and first name and, select **Use Wildcard**.

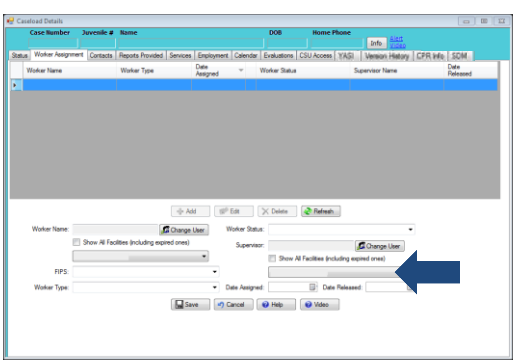
a. Type the **Last Name**.
b. Click the **Use Wildcard** checkbox and the employee search will match any character or sequence of characters that you put in the **Last Name** field.
c. Click the **Name Suffix** checkbox in order to select a suffix from the drop-down menu.
d. Type the **First Name**.
e. Click the **Use Wildcard** checkbox and the employee search will match any character or sequence of characters that you put in the **First Name** field.
f. Search using the employee's work, cell, or fax number by typing it into the **Phone** textbox.
g. The **Find Only Current Employees** checkbox will be selected automatically. If you would like to include former employees in your search results, uncheck this checkbox.
h. Click the **Find** button and the *Search Results* screen will appear.

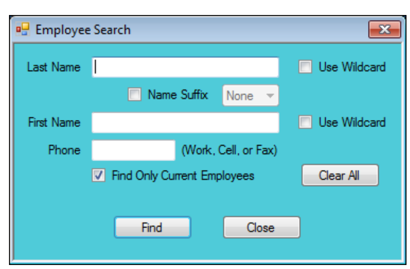


i. (i) Select an employee's name, and the row will be highlighted in *blue*, (ii) click the **Select** button, and the selected name will auto-populate into the **Worker Name** field on the *Caseload Details* screen.

6. Select the (ii) **FIPS**, (iii) **Worker Type**, and (iv) **Worker Status** from the drop-down menus, (v) click the **Change User** button next to the **Supervisor** field, and the *Employee Search* screen will appear.

When a juvenile is released from direct care, the assigned workers and supervisors will receive an email notification.

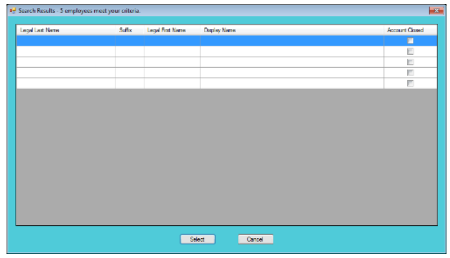




a. Type the **Last Name**.
b. Click the **Use Wildcard** checkbox and the employee search will match any character or sequence of characters that you put in the **Last Name** field.
c. Click the **Name Suffix** checkbox in order to select a suffix from the drop-down menu.

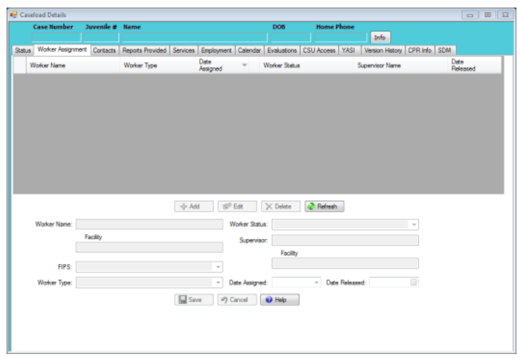
In order to yield broader search results, type ONLY two or three characters of the last and first name and, select **Use Wildcard**.

d. Type the **First Name**.
e. Click the **Use Wildcard** checkbox and the employee search will match any character or sequence of characters that you put in the **First Name** field.
f. Search using the employee's work, cell, or fax number by typing it into the **Phone** textbox.
g. The **Find Only Current Employees** checkbox will be selected automatically. If you would like to include former employees in your search results, uncheck this checkbox.
h. Click the **Find** button and the *Search Results* screen will appear.



i. (i) Select an employee's name, and the row will be highlighted in *blue*, (ii) click the **Select** button, and the selected name will auto-populate into the **Supervisor** field on the *Caseload Details* screen.

7. (i) Select the **Date Assigned** from the calendar screen and (ii) click the **Save** button.



Document Revisions

Revision Date	Revised Item	Revision Details
June 29, 2017	Family Tab – Contacts Screen	The field names for Juvenile Contacts were changed from Father, Mother, Guardian, Other 1, and Other 2 to Parent 1, Parent 2, Guardian, Other 1 and Other 2 to coincide with a change to the Supreme Court of Virginia's DC-511 petition. A drop-down menu for "Relationship" has been added.
July 11, 2017	Evaluations Tab	The Adverse Childhood Experiences (ACE) trauma screen was added to the list of available evaluations.
October 10, 2017	Current Caseload Assignments Screen	A new column called Current Status has been added to the Current Caseload Assignments and Facility Caseloads screens. This column will display the codes of all open case statuses for each juvenile. If the juvenile has multiple open case statuses, an asterisk (*) will be included before the codes. These screens can be accessed by selecting the By User and By CSU/Facility options from the Search menu in the Caseload Management module.
October 10, 2017	Find Juvenile Screen – Advance Search	The screen has been updated and added a Street Address (Full or Partial) and Zip Code to the search.
October 10, 2017	Change User Button – Employee Search Screen	The screen has been updated and removed the Phone (Work, Cell, or Fax) from the search options.
November 16, 2017	Contacts Tab – Contact Purpose Field	The Contact Purpose field was converted from a drop-down menu to a clicklist allowing users to select each contact purpose.
December 1, 2017	JVAP Tab	The JVAP tab was removed from the Caseload Details Screen.
January 5, 2018	Title Page/ Headings/ Format	The format, headings, and title page have been updated for correction.
February 28, 2018	YASI Tab	The YASI tab was created and added to the Caseload Details Screen. The table at the top of the tab provides details on each YASI completed to include: the date administered, staff completing the assessment, risk and protective levels, mental health flags, and violence aggression flags. Highlighting a specific YASI in the table will display the Behavior Analysis, Priorities, Targets, Long-term Goals, Short-term Goals, Protective Factors, and Action Steps associated with that assessment.
July 18, 2018	Map It Button – Current Caseload Assignments screen	The MAP It feature was created and added to the Current Caseload Assignments screen. The Map It button allows geocoded addresses to appear on the Map Addresses screen as points on a Google map. Users are able to open the address on Google map and print the map or directions to the address.

August 16, 2018	Contacts Tab – Person Contacted Field	The Person Contacted field was converted from a drop-down menu to a click list allowing users to select each person that was contacted.
August 27, 2018	Title Page / Headings / Format / Screenshots	The format, headings, title page, and screenshots have been updated for correction and consistency.
October 25, 2018	YASI Tab – Assessment Type	Pre-Screen Assessment and Pre-Adjudication were added as Assessment Types.
January 15, 2019	BADGE Home Screen	BADGE Home Screen has added the Non – JTS Modules Menu.
January 30, 2019	Find Juvenile Screen - Advance Search	The Find Juvenile screen has been updated and added the ability to search for a juvenile by an Alias previously recorded in BADGE. In addition, clarification was added to two other search criteria indicating that (i) the search for alternative spellings only applies to the first name field and (ii) the search for a phone applies to a home, work, or cell phone.
July 1, 2019	Reports Provided Tab - Comprehensive Re-Entry Case Plan – CSU Tab	The “How motivated is the juvenile/family to change”, Frequency of contact with parent/guardian”, and “Frequency of contact with external agencies” fields have been added.
July 1, 2019	SDM Tab	The SDM Tab was added under Caseload Details Screen to record SDM information.
July 12, 2019	Workload Case Statuses	Screenshots were updated to incorporate revisions to the workload case statuses.
August 27, 2019	Parole Supervision Risk Reassessment	The Parole Supervision Risk Reassessment was removed from the Evaluations Tab.