Chapter 1 - General Information

How to Get Help

First:

Determine which area you are having problems with. Refer to the section of them manual that relates to the function you are trying to perform.

Second:

Email the Probate/Juvenile Help Desk. Email is checked several times a day and you should receive a response the same day if we are in the office.

PCSHELPDESK@COURTS.MI.GOV

Third:

Call the Probate/Juvenile Help Desk. The court rep's are available to assist you with your problems, questions and concerns.

1-888-339-1547

In addition, the user always has access to the following management personnel:

Mr. Marcus F. Dobek
Director
Judicial Information Systems
309 N. Washington Square
P.O. Box 30048
Lansing, MI 48909
(888)339-1547 or (800)572-1116

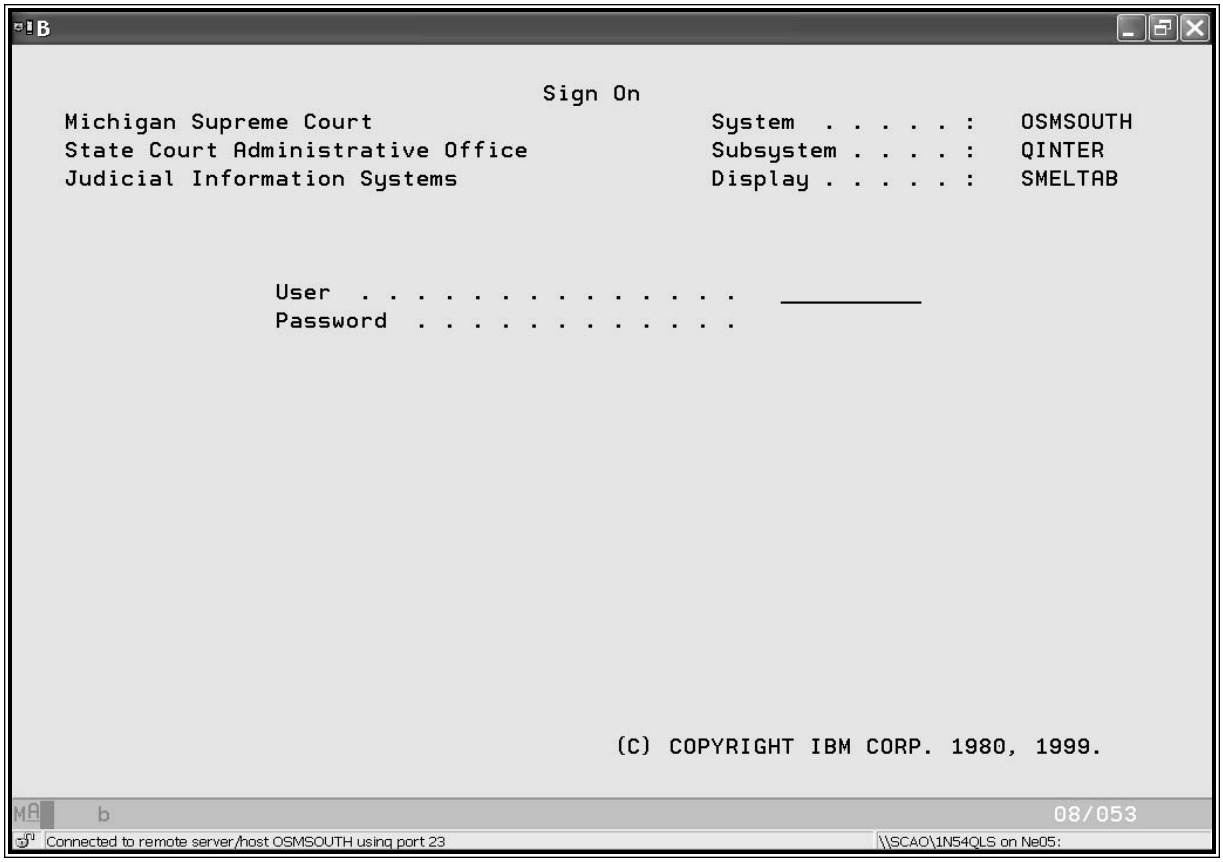
NOTE: If you are having a Windows problem or are unable to get connected to the AS400 from your PC, you need to contact your Data Processing/Information Systems personnel.

Accessing the Probate System

Sign on Procedure:

Before you can access the Probate System, you will need to be assigned a user ID. Your user ID identifies you to the computer as an authorized user of the Probate System. You will also need a password which protects your user ID from unauthorized use. You will be able to select your own password, choose something that will be easy for you to remember. Both the user ID and password are required for a successful sign on.

If you are not already signed on, your workstation will display the screen shown below. Enter your user ID in the **User** field, it will be displayed as you type. Enter your password in the **Password** field. For security reasons, this field will not be displayed as you type. The remaining fields (if any) are left blank.



If an error message appears, verify your user ID and password and re-enter them.

Pressing <F3> from the Probate or Juvenile Transaction Request Screen will return you to this screen. You should return to this screen at the end of each day before shutting your computer off.

Standard Function Keys

<F1> This key is used to get help on the area that your cursor is placed. A window will appear on your screen giving you help information for that area.

<F2> This key is used to position your cursor on the next tran line.

<F3> This key is used to cancel any entry that you have made on a screen before you have pressed <Enter> or it is used to exit from any screen.

<F4> This key is used to prompt on a field for a list of all valid entries for that field.

<F5> This key is used from the Transaction Request Screen when setting up the system.

<F6> This key is used to go to the Command Selection Menu to work with printer and security issues.

<F8> This key is used to switch from processing Juvenile cases to processing Probate cases.

<F9> This key is used to look up names in the system.

<F10> This key is used to process information in the Financial system and it is also used on the Transaction Request Screen for looking up cases for attorneys.

<F14> This key is used to produce court dockets.

<F16> This key is used to determine the Inventory Fee.

NOTE: This is not a complete list of function keys, each section that has special processing for a certain function key will be explained in that section. This is a list of standard function keys.

Name Entry Rules

All name fields in the system are entered according to the following rules:

1. The names should be entered as **Last, First, Middle, Suffix** where:

   Last = Last Name
   First = First Name
   Middle = Middle Name
   Suffix = Jr - Junior, Sr-Senior, I, II, III, etc.

2. The name must include a minimum of two commas or slashes, even if the first name is omitted. A company name must be followed by two commas or slashes.

3. Valid characters are any letter A-Z, any number 0-9, and the following special characters :-,&().

4. The first character of the name cannot contain a special character.

Following are examples of name entries:

Regular Names

Jones,Robert,
Jones,Robert,M,

Names with suffixes

Jones,Robert,M,Sr
Jones,Robert,M,III

Names with special characters

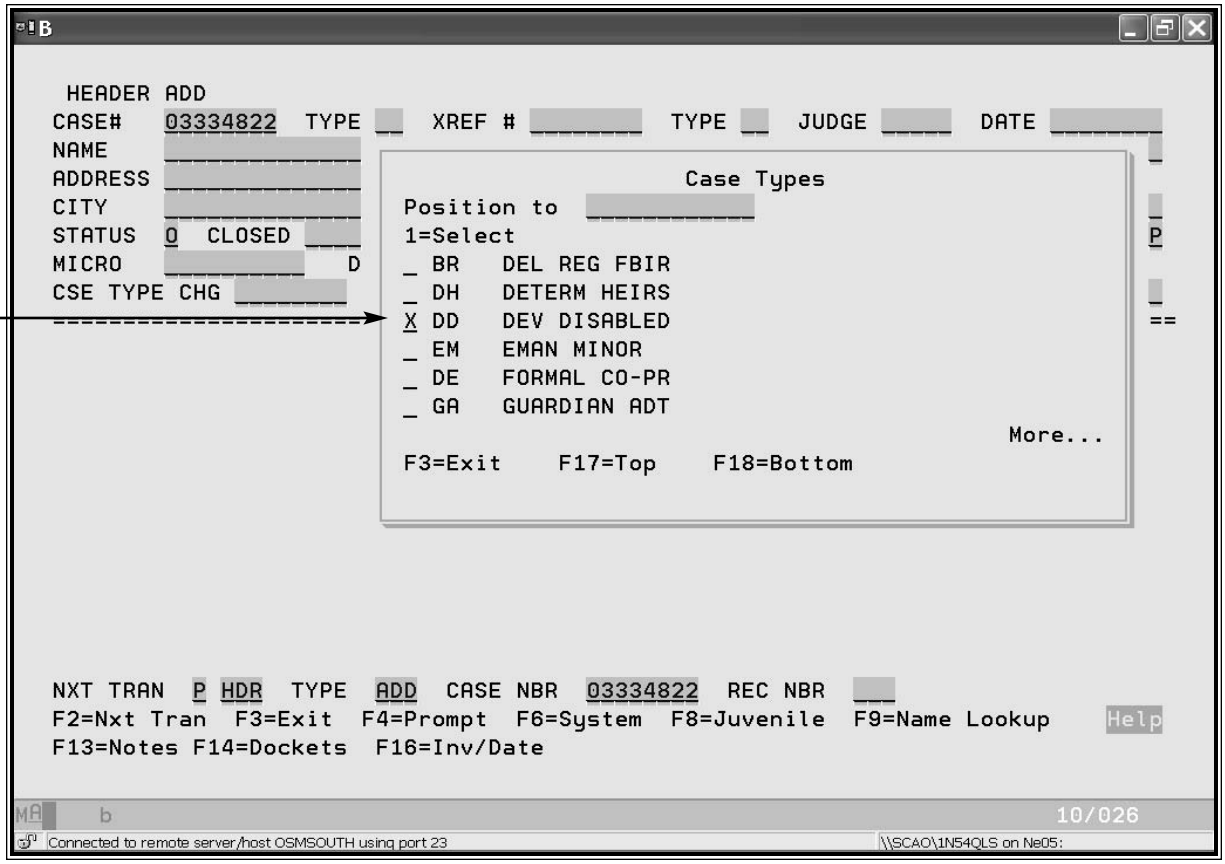
O'Brien,Patrick,M
Van Horn,Michael,
D & D Supply,,

Company Names

Allstate Insurance Company,,
Michigan Supreme Court,,

F4 - Field Prompts

Field prompts are available on fields that can have multiple entries. <F4> is the prompt key. <F4> is pressed from a field that allows prompting. The system will return a list of valid codes that can be used for the field you prompted from. The following example shows the prompt list.



Codes will be displayed in a separate window. there is a “Position to” field that can be used to search for a particular code/description.

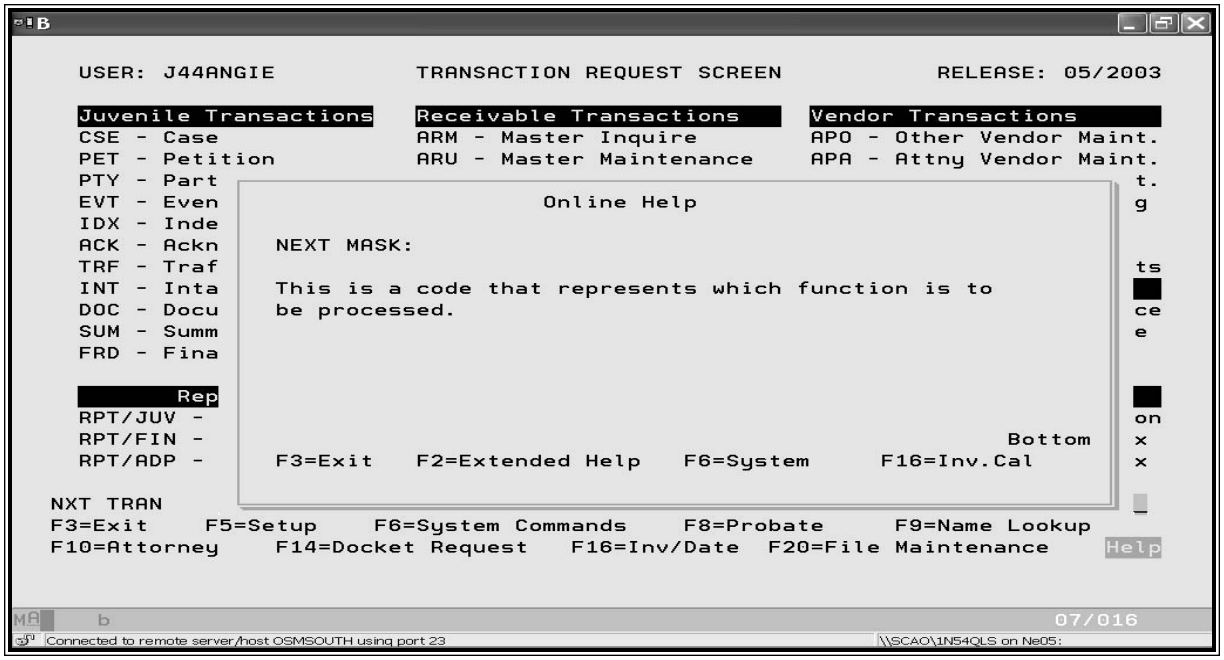
By entering an “X” to the left of the code that you want to select and pressing <Enter>, the system will insert that code into the field you prompted from.

If you do not want to make a selection, press <F3> and the system will return you to the screen you prompted from.

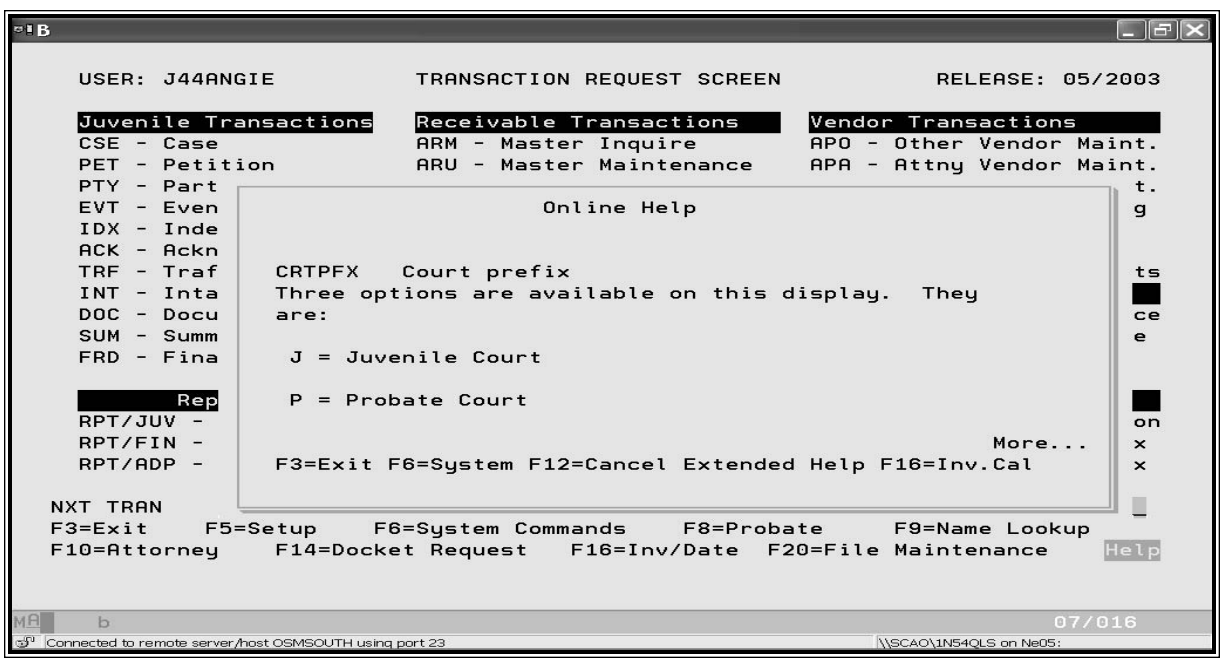
F1 - Help

On screen help is available for a specific field or the entire screen that you are on. If <F1> is pressed on a field or screen, the system will show a pop up screen with information about the field/screen you requested help for.
Use <Page Up> and <Page Down> keys to scroll through the information.

Following is an example of field specific help.



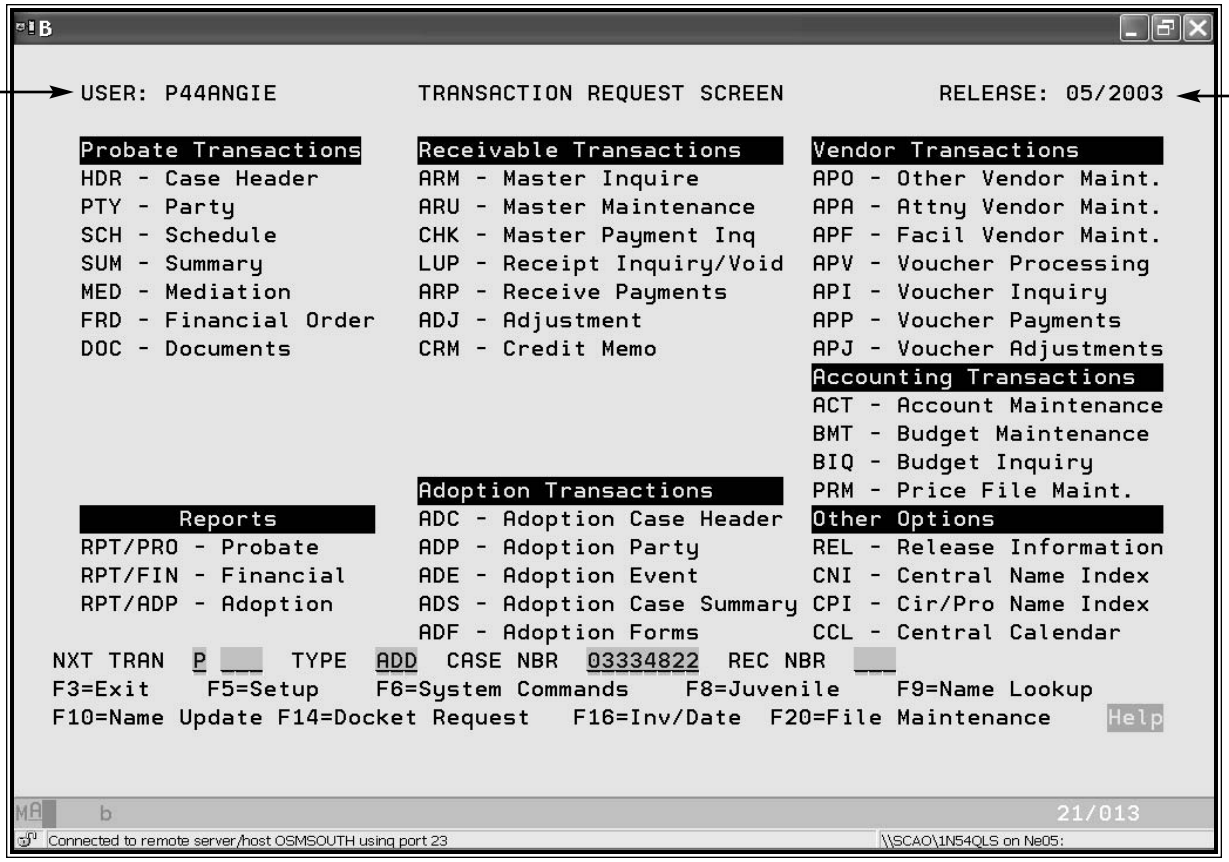
<F1> was pressed on the Next Tran Type field. The above screen shows the help text for that field. If extended help is needed, press <F2>. The system will return the following screen. Press <F3> to exit.



Transaction Request Screen

The initial screen you will see is the Transaction Request Screen. Depending on the level of security that you have will determine which functions you see on your transaction request screen.

Following is an example of a Transaction Request Screen.



In the upper left corner is your user id. This will tell you who is signed on at the machine.

In the upper right hand corner is the release date. This will tell you the date of the last software release that was installed on the AS400.

The functions which may be performed are grouped by the type of transaction.

~Probate~

The probate transactions, excluding financial orders, allow you to enter data, perform inquiries and produce forms. Refer to the JIS Probate System Manual for information on these transactions.

~Juvenile~

The juvenile transactions allow you to enter data, perform inquiries and produce forms. Refer to the specific chapter in this manual for information on these transactions.

~Adoption~

The adoption transactions allow you to enter data, do inquiries and produce forms. Refer to the JIS Adoption Manual for information on these transactions.

~Financial~

The financial transactions consist of Accounts Receivable and Accounts Payable. Refer to the JIS Financial System manual for information on these transactions.

~Reports~

The report transactions allow you to run reports that will provide information on the data hat exists in the system. Refer to the individual system manuals for details on reports.

~Other~

The other transactions include release information and cross application transactions. These items will be discussed in all JIS manuals.

Next Tran Line:

The next tran line is available on most every screen in the system. This line is used to take you from screen to screen throughout the system. Following is an example of the next tran line.

```
NXT TRAN    ____  TYPE ____   CASE NBR  00000000 __ PET 00000000 EVT ____  PTY __
```

~Next Tran Field~

The next tran field is the transaction that you want to perform. Following are possible choices for Juvenile:

CSE	-	Case
PET	-	Petition
PTY	-	Party
EVT	-	Event
TRF	-	Traffic
INT	-	Intake
DOC	-	Document Summary
SUM	-	Summary

~Type~

The type field is the type of transaction that you want to perform. Following are possible choices:

ADD	-	Add
INQ	-	Inquiry
MOD	-	Modify
DEL	-	Delete
SUM	-	Summary

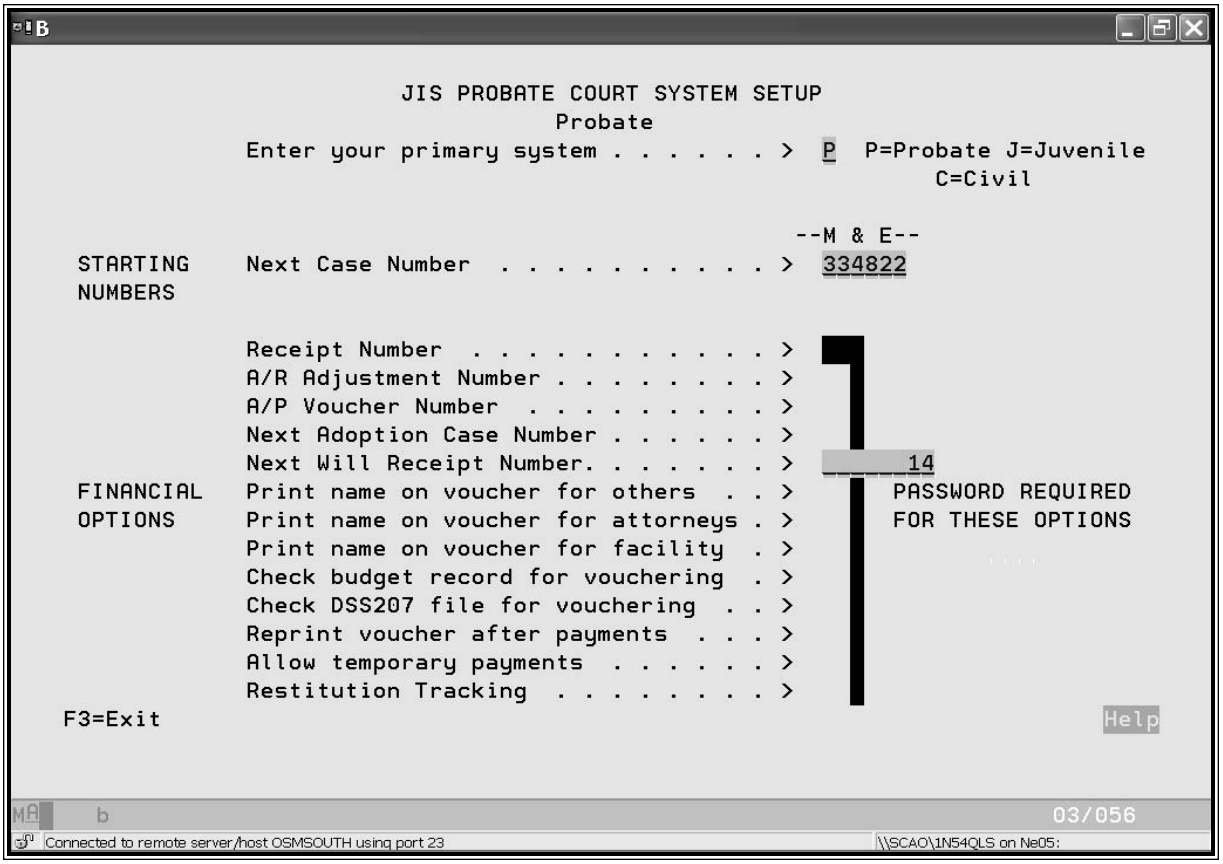
The remaining fields hold the case number, suffix number, petition number, event number and party number.

Function Keys

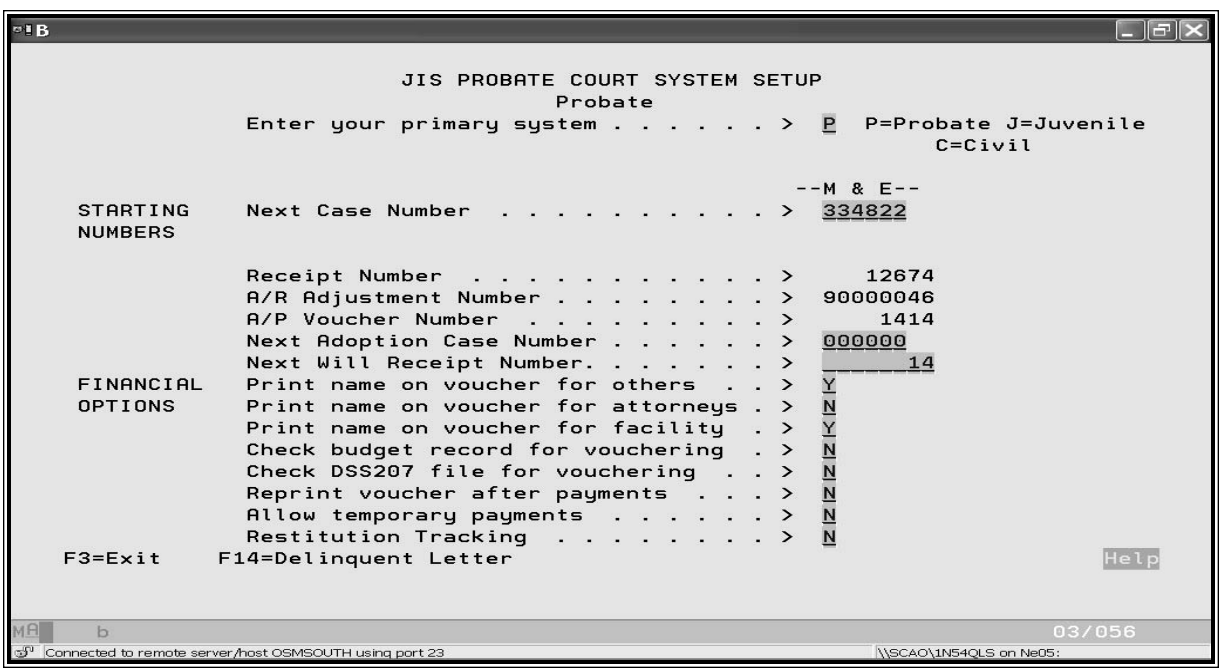
<F1>	Help
<F3>	Exit
<F5>	JIS system setup. The set up screen is discussed later in this chapter.
<F6>	System commands. System commands allow you to work with printers and security.
<F8>	Toggle between probate system and juvenile system.
<F9>	Name Lookup
<F10>	Attorney case lookup
<F14>	Docket Request
<F16>	Inventory/Fee Calculator
<F20>	File maintenance

JIS Probate Court System Setup

The setup screen is accessed by pressing <F5> from the Transaction Request Screen.



Enter your three character password and press <Enter>. The system will to open these fields. Your security level will determine the amount of fields that will open.



Following are field descriptions for the above fields.

~Next Case Number~

If automatic case numbering is being used, this field will hold the next available case number.

~Receipt Number~

This field will display the next receipt number. This field can't be modified.

~A/R Adjustment Number~

This field will display the next adjustment number that the system will use.

~A/P Voucher Number~

This field displays the next voucher number that the system will use.

~A/R Adjustment Number~

This field will display the next adjustment number that the system will use.

~Next Adoption Case Number~

If automatic case numbering is being used, this field will display the next available adoption number.

~Next Will Receipt Number~

This field will display the next will receipt number that the system will use.

~Print Name on Vouchers for Others~

This field is used to either print the name on the vouchers when "Other Vendor Vouchers" are created or not. The valid entries are Y-Yes and N-No.

~Print Name on Vouchers for Attorneys~

This field is used to either print the name on the vouchers when "Attorney Vendor Vouchers" are created or not. The valid entries are Y-Yes and N-No.

~Print Name on Vouchers for Facilities~

This field is used to either print the name on the vouchers when "Facility Vendor Vouchers" are created or not. The valid entries are Y-Yes and N-No.

~Check budget record for vouchering~

This field is used if the budget has been set up in the BMT - Budget Maintenance screen. it will check the budget when you create a voucher to make sure that money is available in that account.

~Check DSS207 file for vouchering~

It will check the DSS 207 records when creating a voucher to be sure that the correct days code is used.

~Reprint voucher after payments~

This will re-print the voucher when a payment is applied to it.

~Restitution Tracking~

This field is used to turn restitution tracking on and off. This is only a Juvenile function.

Delinquency Letter

The delinquency letter is used to inform parties that they are delinquent in paying on their accounts. There is a separate letter for juveniles and for there parents. By pressing <F14> from the JIS setup screen, the system will display the “Parents Letter”. All text that displays on the screen can be modified.

Once any modifications have been made, you must press <F10> to update the letter. Both parents and the juvenile delinquent letter need to be updated after changes are made.

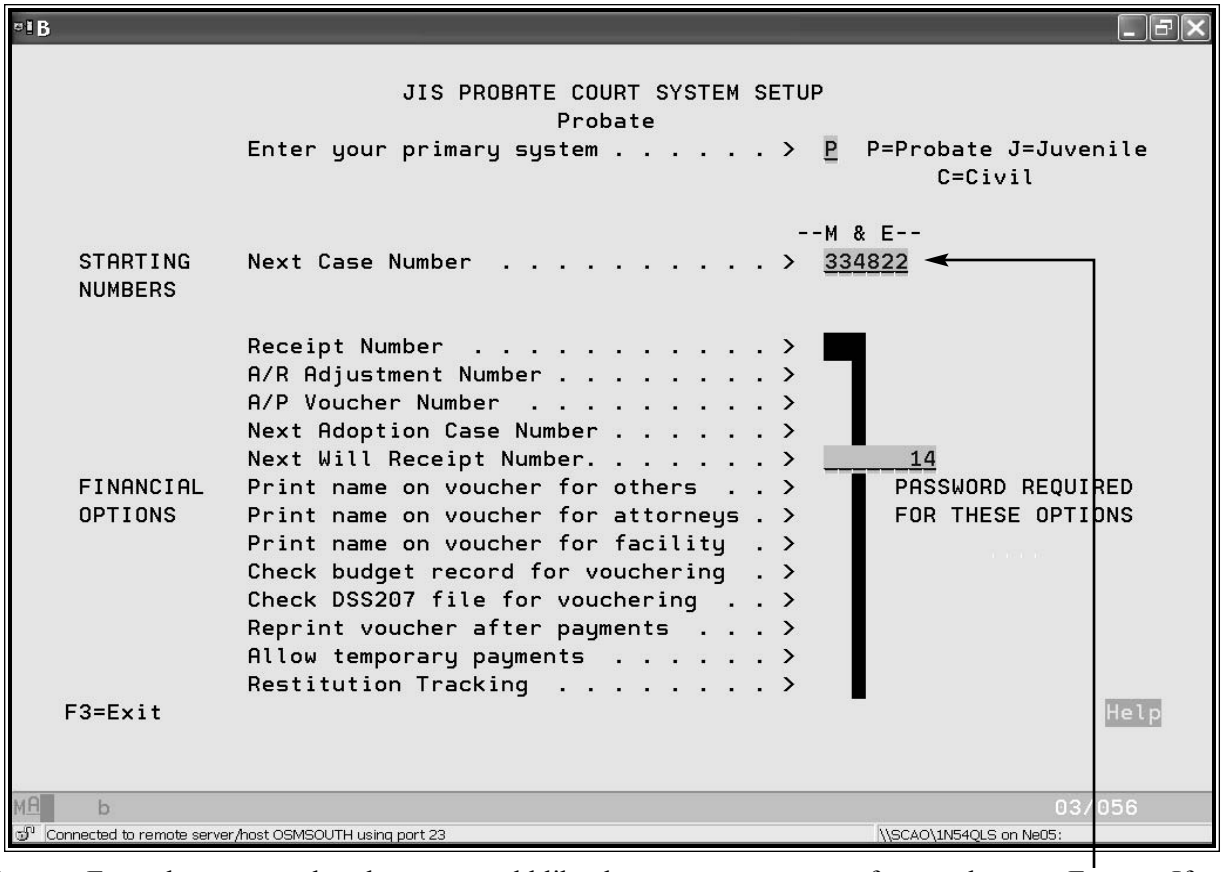
Following is an example of the delinquent letter.

```
PLEASE BE ADVISED THAT BY FAILING TO MAKE THE PAYMENTS AS ORDERED, YOU WILL BE

SUBJECT TO A CONTEMPT OF COURT CHARGE. THIS MAY BE PUNISHABLE BY AN ASSIGNMENT

OF WAGES AND/OR PLACEMENT IN THE COUNTY JAIL.

YOU MAY AVOID THESE UNPLEASANT CIRCUMSTANCES BY MAKING ARRANGEMENTS WITH THIS

COURT WITHIN 15 DAYS TO PAY THE ARREARAGE AND THEN THEREAFTER MAKING PAYMENTS AS

ORDERED UNTIL THE BALANCE IS PAID IN FULL.

FAILURE TO DO SO WILL RESULT IN CONTEMPT OF COURT PROCEEDINGS, AND AT THESE

PROCEEDINGS OTHER CHARGES MAY BE ORDERED.

IT IS NOT THE COURT'S DESIRE TO PURSUE THE CONTEMPT OF COURT CHARGE, AND WITH

YOUR COOPERATION IT WILL NOT BE NECESSARY.
```

Automatic Generation of Case Numbers

Automatic generation of case numbers must be set up in the JIS juvenile system setup.

1. From the Transaction Request Screen, press <F5> and the system will return the following screen.



2. Enter the case number that you would like the system to generate from and press <Enter>. If you have authority to change this number, the system will begin numbering cases from this number.

Entering a Case Using Automatic Case Numbering

Enter the following on the Next Tran Line:

```
NXT TRAN P HDR  TYPE ADD   CASE NBR  00000000  REC NBR __
```

1. Enter HDR/ADD.

2. Leave the case number field blank.
3. Press <Enter>. The system will display the header add screen.

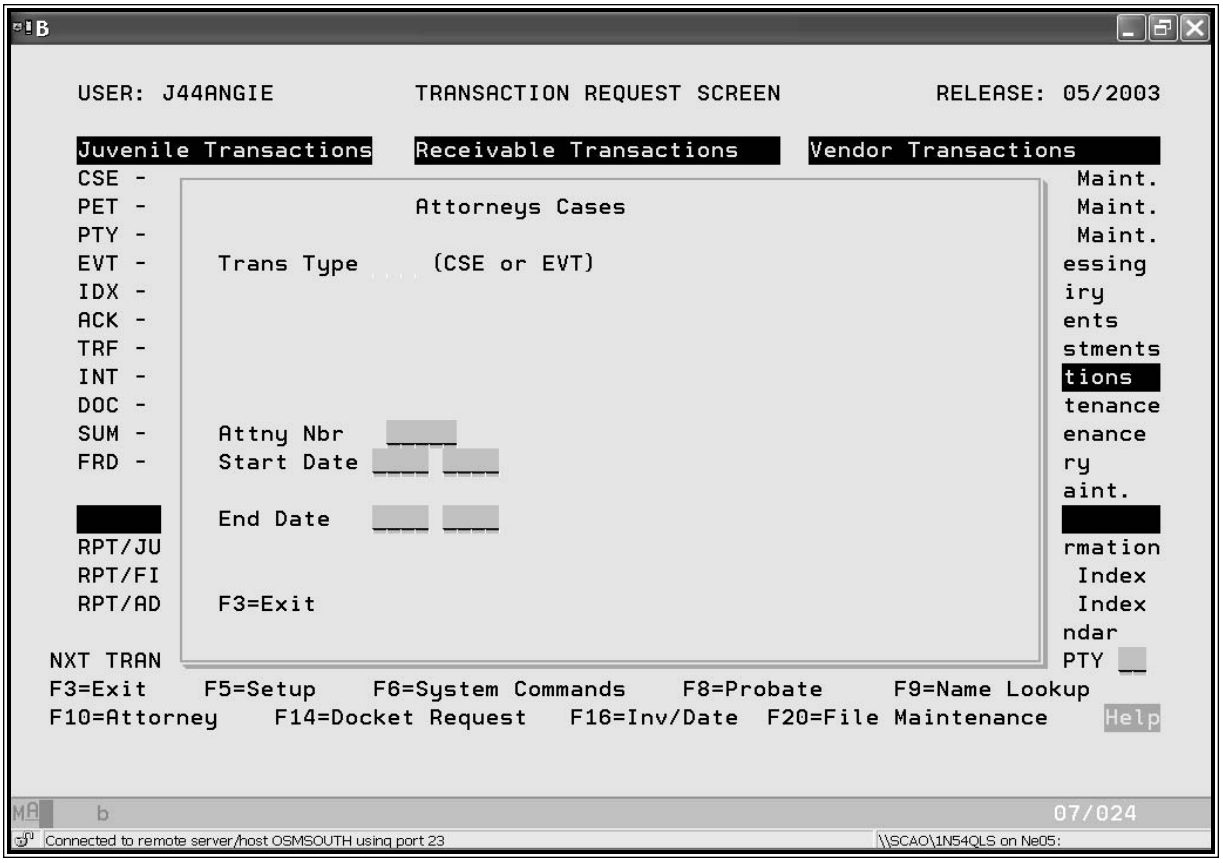
NOTE: Only one person can be in a Header ADD screen at a time when using automatic case numbering.

F10 - Attorney

The <F10> Attorney function is used to locate information about an attorney. There are two processes that can be used to generate information.

1. Case
2. Event

To access the attorney screen, press <F10> from the Transaction Request Screen and press <Enter>. The system will display the following screen.



1. Enter the transaction type that you want the system to search through. The valid entries are:
   CSE - This will list all cases in which the attorney was appointed during the given time period.
   EVT - This will list all cases and the event type that this attorney was entered on.

2. Enter the attorneys bar number.

3. Enter the begin and end dates and press <Enter>. The system will display the following.

CSE - Case

```
                    ATTORNEY SUMMARY OF CASES

ATTORNEY NUMBER  98500    NAME TEST,TEST,
CASES TO WHICH ATTORNEY WAS APPOINTED  801 2004 TO  801 2004
CASE #   SFX    RESPONDENT NAME
11009008        TEST DELINQUENT//

TOTAL CASES FOR  ATTORNEY =    1
```

EVT - Event

```
                         ATTORNEY SUMMARY OF EVENTS

     ATTORNEY NUMBER 12345    NAME CROCKETT,GEORGE W.,III
                         EVENTS DATED   FROM  101 2002 TO 1231 2002
  CASE #   SFX  RESPONDENT NAME                      EVT TYPE  EVT DATE
 00000088     TESTER/ZEROS/CASENUMBER                  ORC      107 2002
 00000214  1  TESTER,CHILD,ONE                         PRH      101 2002
                                                       PRH      101 2002
 00000214  2  TESTER,CHILD,TWO                         PRH      101 2002
                                                       PRH      101 2002
                                                       PRH      101 2002
 00000316     TESTER,ABSTRACT,ADDTOFILE                NOH     1001 2002
                                                       NOH     1001 2002
                                                       PRH     1101 2002
 00010522     TESTER,NAME,FILE                         PSV      101 2002
                                                       PSV      101 2002
                                                       PSV      101 2002
                                                       NOH      101 2002
                                                       NOH      101 2002       +

    TOTAL CASES =    55            TOTAL EVENTS =   144

MA   b                                                                  01/001
Connected to remote server/host OSMSOUTH using port 23          \\SCAO\1N54QLS on Ne05:
```

Inventory/Date Calculator

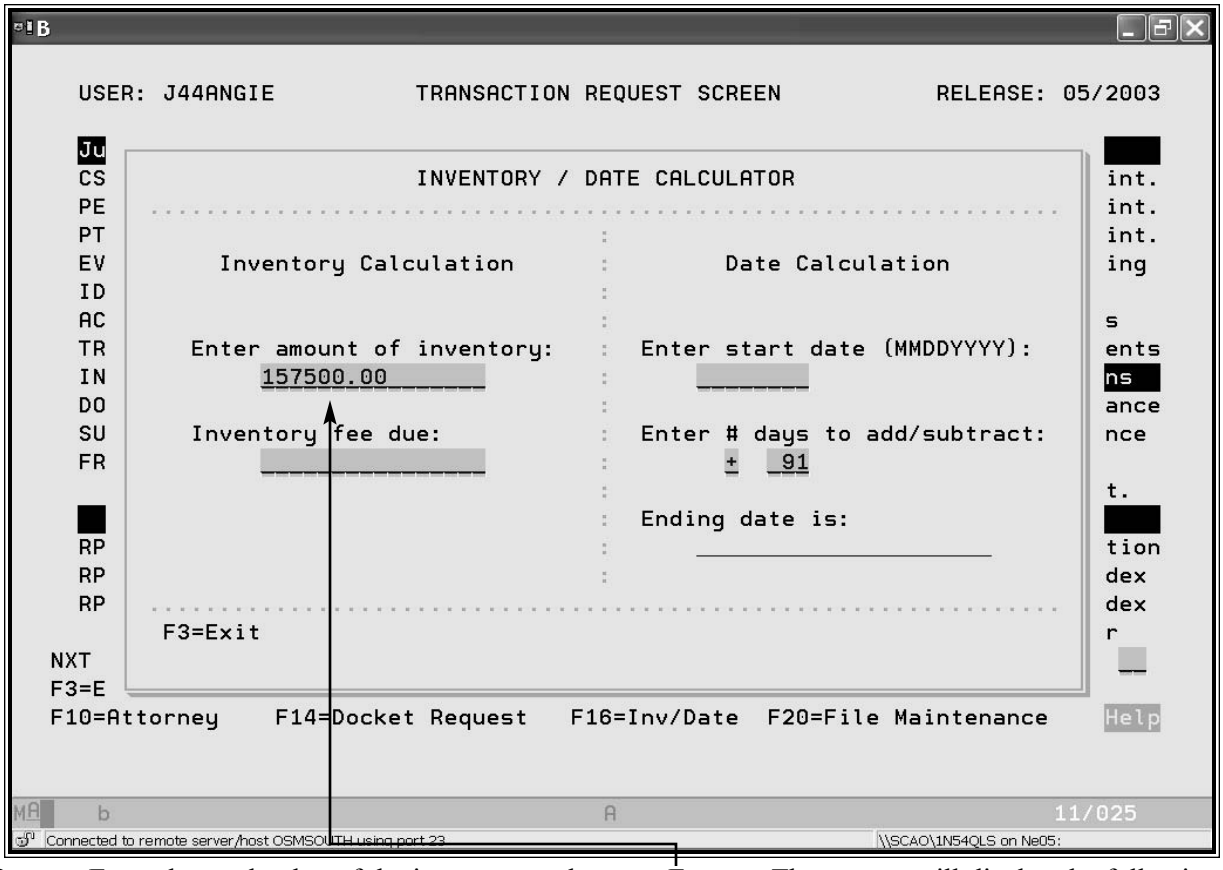
The Inventory/Date calculator is used for two purposes.

1. To calculate a Inventory Fee
2. To calculate dates.

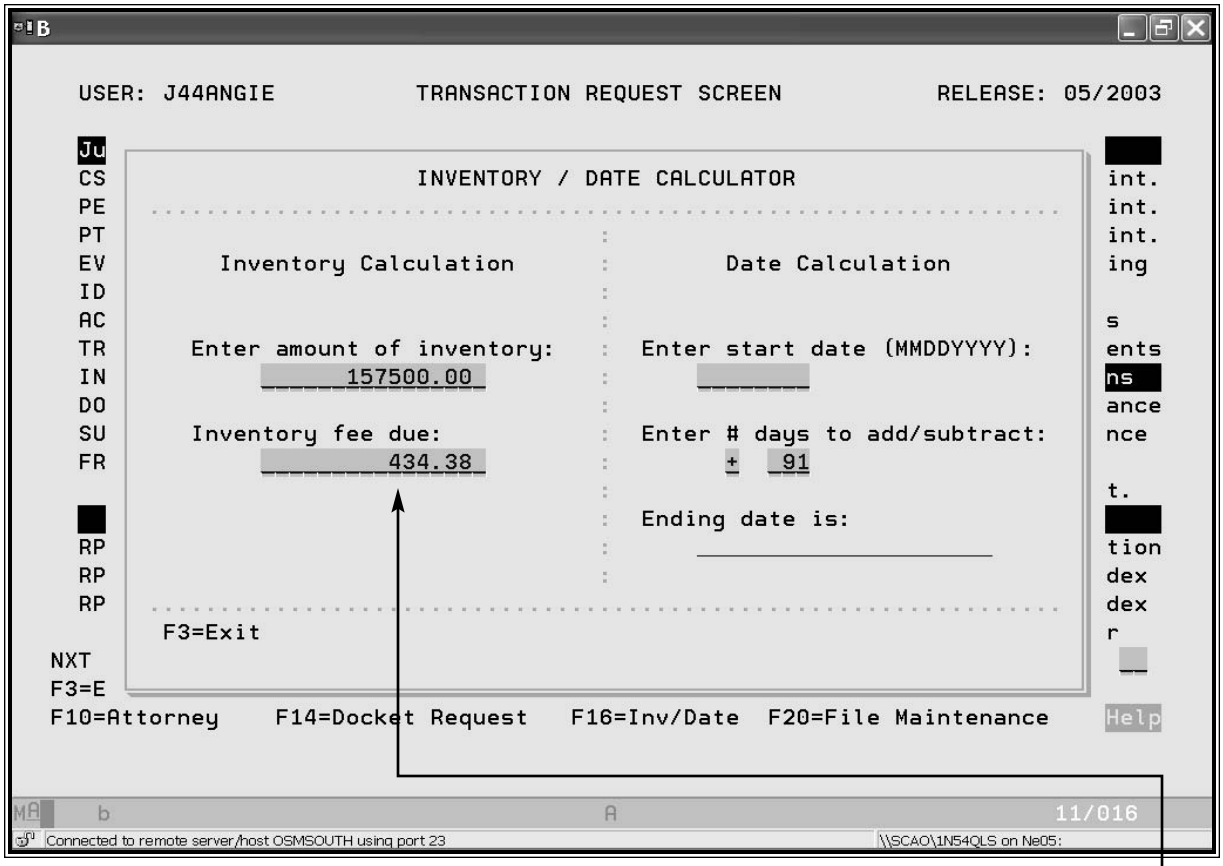
This function can be accessed from most any screen throughout the Probate system by pressing <F16>.

Inventory Fee Calculations:

1. Press <F16> and the system will display the following screen.



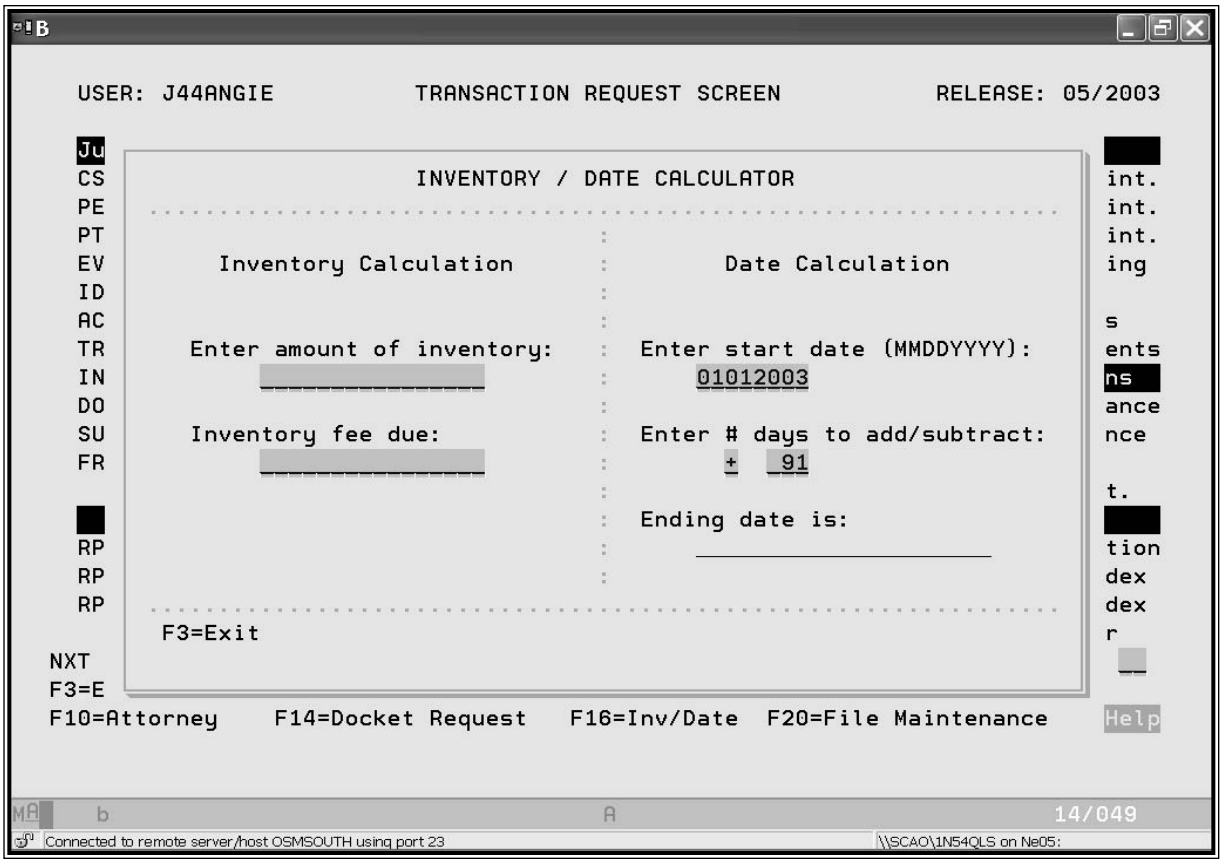
2. Enter the total value of the inventory and press <Enter>. The system will display the following screen.



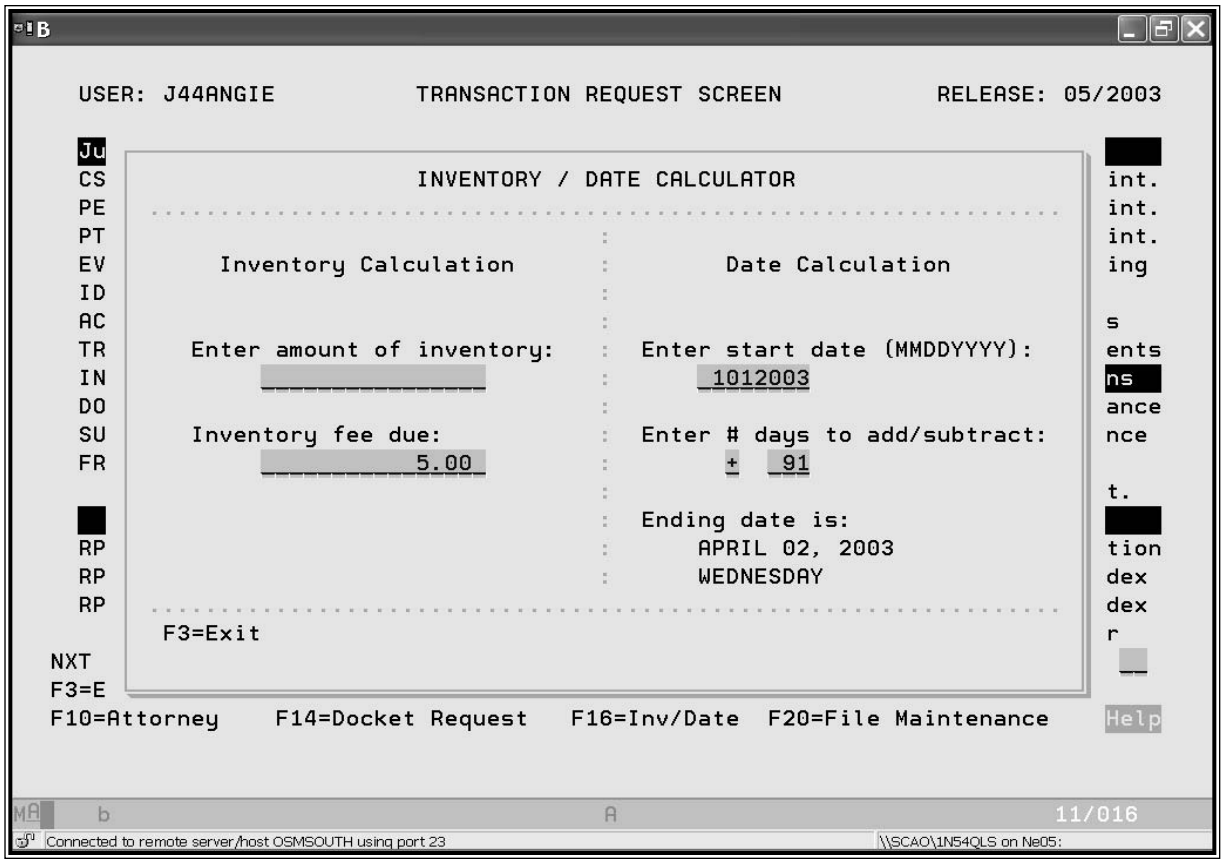
Displayed on the screen is the amount of the Inventory Fee that is due on the amount you entered.

Date Calculator:

1. Press <F16> and the system will display the following screen.



2. Enter the date that you want to calculate from and the amount of days to calculate along with the plus/minus and press <Enter>. The system will display the following screen.



Displayed on the screen is the date that was calculated.

Notes - F13

The Notes program is used to enter information regarding the case or a party on the case. By pressing <F13> from any screen, the system will display the notes screen.

> NOTE: The notes screen is party specific. You must enter the party number on the Next Tran Line and press <Enter> before pressing <F13>.

```
Court ID :  J 44 ANGIE          Case File Notes                Release : 025
Case    sfx Name                                    Party
00895019    SMITH,AARON,

**YOU ARE ORDERED TO PAY $25.00 A WEEK UNTIL PAID IN FULL.

TESTING CENTRAL NAME INDEX

TESTING ZERO DISPLAYS

This record is on file

F1=Help F2=Top Text F3=Exit F5=Print F6=System F7=Prv.Page F16=Inv.Cal Page 001
```

Instructions for using the notes screen.

1. The first four lines are used to print special instructions on the bills. Only use the first four lines if you have special instructions that you want printed on the persons bill.

2. Any previous notes that have been entered will appear after the first four lines.

3. Use the <Page Up> and <Page Down> keys for scrolling through the notes.