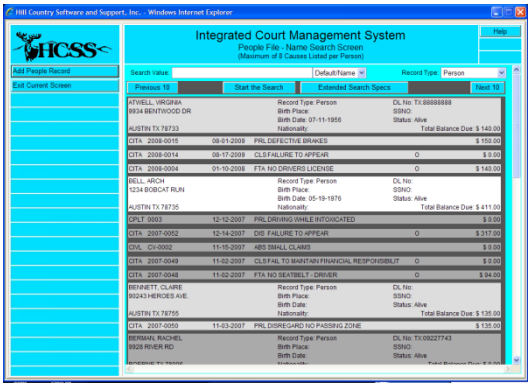
Hill Country Software & Support, Inc.
Integrated Court Management System

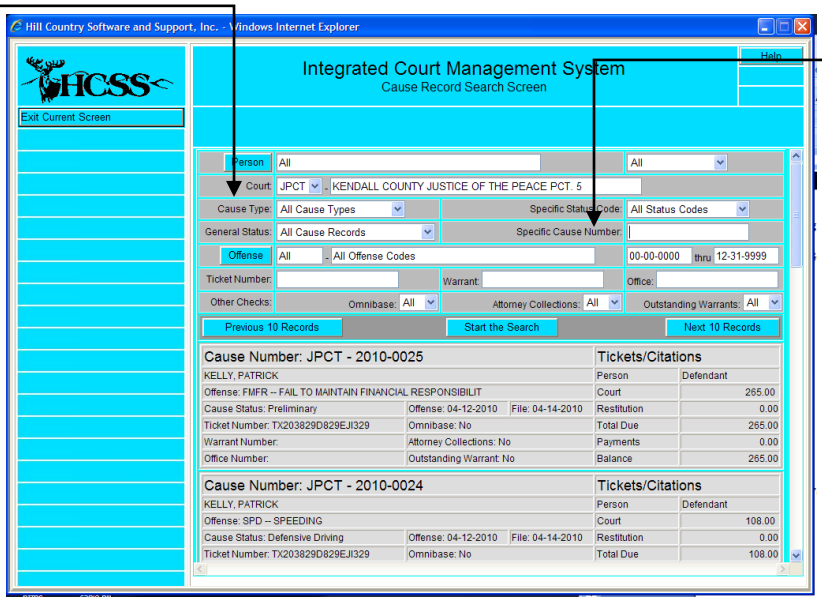
Looking up people/causes:

1. Get to Main Menu
    a. At Log In page enter User Name and Password
    b. Click on *Inquiry/Update Procedures*
    c. Click on *Court Management – Inquiry/Update*

2. To look up a person:
    a. click on *Work with the People Master File*
    b. At Name Search Screen be sure you are in all caps and type in the name of the person you are looking for. If it is an unusual name you will likely only have to enter a few letters of the last name before hitting enter. If it is a common last name be sure and enter the entire last name followed by a comma, space, and then at least the first letter of the first name.
    c. Hit Enter or click on *Start the Search*
    d. Once you find the person you are looking for you can click on their name or one of their causes



3. To look up a cause:
    a. Click on *Work with Cause Master File*
    b. Select Criminal Complaints from the drop down menu as the Cause Type for the search
    c. Enter the cause number you are looking for in the Specific Cause Number
    d. Hit Enter or click on Start the Search



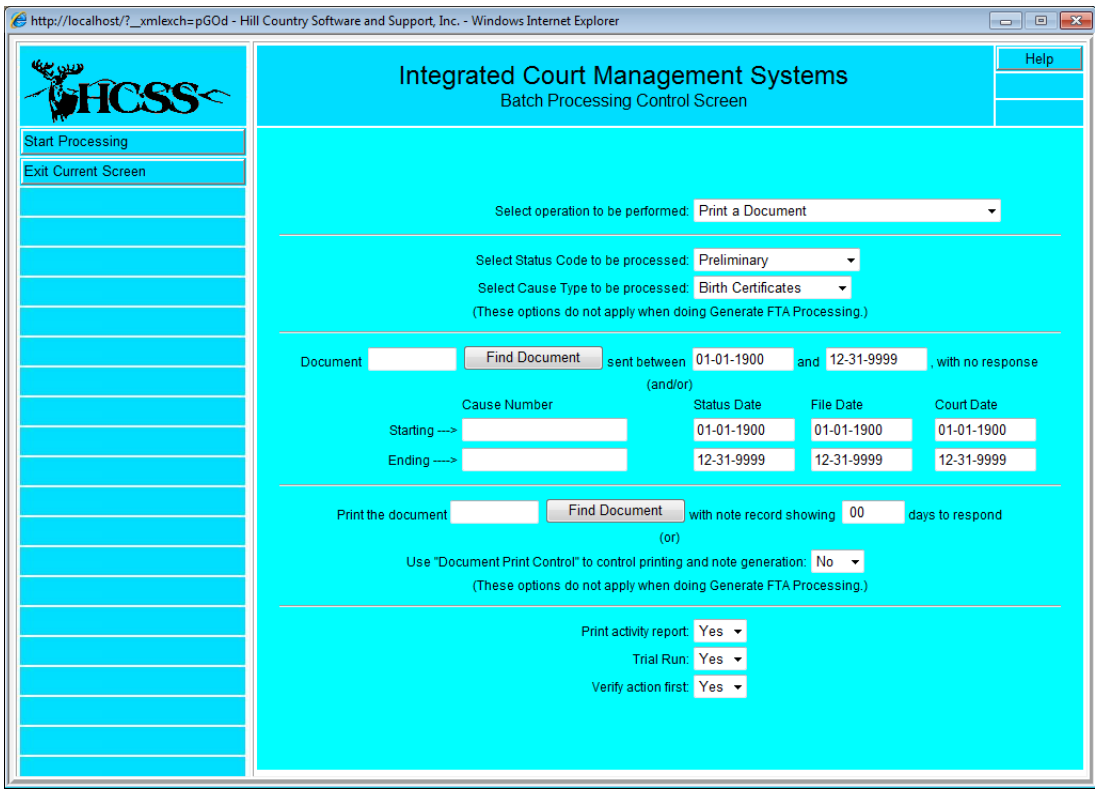
4. **Receipts**
    a To search by receipt number:
        - From Main Menu click on Work with the Receipt Master File
        - Click on Receipt Number Inquiry
        - Enter the receipt number you are searching for
        - Click on Process Receipt Number (Do not hit enter!)
    b If you don't know the receipt number:
        - If the receipt is for a cause (criminal, civil, or probate), pull up the cause and click on View Transactions. You should see it listed here.
        - If it is a misc. receipt go to Work with the Receipt Master File
        - Click on List Miscellaneous Receipt Transactions
        - Scan the list of receipts to find the one you are searching for

5. **Adding receipts**
    a. Search for cause and open cause screen
    b. Check for money owed
    c. If correct, click on Money – Accept Payment
    d. Enter info for:
        i. Amount to be Paid
        ii. Miscellaneous Comments (if needed)
        iii. Mode of Payment
    e. Click on Post this Regular Payment
    f. If needed, change payor, date received, and money distribution. If you changed the money distribution, click Recalculate Values
    g. Click on Post the Payment (Are you sure? Yes)
    h. The system will give you the next receipt number. If this is correct, click on Process Receipt Number.
    i. Click on Print the Receipt for as many copies as you need
    j. Click on Exit Current Screen

6. **To Add a new note record**:
    a. From the Cause Screen click on Add New Note Record
    b. Enter Event Date and Time
    c. Choose Proceeding (if applicable)
    d. Enter notes
    e. Click on Save Changes
    f. Click on Exit Current Screen
7. **To View all notes**:
    a. From the Cause Screen click on View Transactions
    b. The most recent notes will be on top. If you have more than one page of notes you can scan by clicking on Previous or Next 25 Transactions
    c. If you need to correct a note or view it in more detail, click on the note you want to look at
8. **Printing notes**:
    a. From the Cause Screen click on Print Activity List
    b. Uncheck the types of transactions you don't want to print
    c. Click on Print Activity List

9. **Adding a new case**
    a. First search for the person (Defendant in Criminal, Plaintiff in Civil)
    b. If the person is already in the system click on their name and verify/update data if needed.
    c. If the person is not already in the system click on Add People Record and add new person's info. Save changes.
    d. Click on Cause – Add New Cause
        i. Step 1 – skip
        ii. Step 2 – Select Cause type you are adding
        iii. Step 3 – Click on Get Next Cause Number
        iv. Step 4 - If the number is not correct, type over the number it gives you with the correct one
        v. Step 5 – Click on Build Cause Record
    e. At Cause Screen enter cause info
        i. Filed Date (if old ticket)
        ii. Citation Date & Time
        iii. Offense or Class Code (click on Offense or Class Code Button)
        iv. If this is a Civil add additional parties & attorneys
        v. Add appearance or court dates
        vi. Other relevant data
    f. Save all Changes
    g. Click on Money – Initial Charges
        i. If the fines have been set for this offense it will give you the total amount due. If the fines have not been set, type over the amount given with the correct amount.
        ii. Post Transaction

10. **Printing a Document (letters, warrants, etc)**
    a. Printing one document for one cause
        i. From the cause screen click on Document and Imaging Processing
        ii. Click on Word Perfect Document Processing
        iii. Find the document you want to print and click on either
            1. ED – merges the document and lets you look at it in Word Perfect giving you the opportunity to make any edits or additions. You must hit print in WP and close WP when you are done.
            2. PR – merges and prints the document

11. Printing a BATCH of documents

a. From the Main Menu choose Batch Processing Control Screen
b. Leave operation to be performed as "Print a Document"
c. Select Status Code and Cause Type. This depends on what you are doing. Cause Type will always be Citations, but the Status code will be different depending on what you are doing.
d. Usually in this section you will use the Status, File, or Court Date to narrow down which causes you want to print documents for.
e. If you are doing a Trial Run you can skip this step. If you are ready to run the batch, click on Find Document and choose the document you want to print. If this document requires an action from the defendant that you want to be reminded about (DSC deadline, last chance before a warrant, etc) enter how many days you want to give the defendant to respond. This doesn't show up on the document, instead this is the due date on the note record that will be generated when this batch is run.
f. If this is a Trial Run all three questions should say "Yes". If you are ready to run the batch all three should say "No"