

# QUICK REFERENCE GUIDE ON SURVEYS TO DO FOR EACH CASELOAD TYPE

## PROBATION CLIENTS

**SURVEYS TO CREATE AT ADMISSION/INTAKE** – at least creating them will start sending information to the repository, even if you do not complete them right now

1. **DEMOGRAPHICS**: Right click client > Surveys > Demographics
2. **BACKGROUND AT SCREENING**: Right click instance > Surveys > Background at Screening (finish and Complete to save snapshot)
3. **ACTIVE STATUS**: Right click instance > Surveys > Active Status
4. **REFERRAL AND CASE ASSIGNMENT**: Right click instance > Surveys > Referral and Case Assignment
5. **SUPERVISION PLANNING AND STRATEGIES**: Right click instance > Surveys > Supervision Planning and Strategies

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## **SURVEYS TO CREATE DURING PROBATION TERM AS NEEDED**

### **PETITION TO TERMINATE (ON VIOLATION TYPE)**

#### **To record PTRs**

- a. Right click instance > Edit Revocations
- b. Add revocation record
- c. **PETITION TO TERMINATE (ON VIOLATION TYPE)**: Right click on the new PTR record > Surveys > Petition to Terminate (on violation type)

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## **SURVEYS TO CREATE UPON TERMINATION**

1. **FINAL ASSESSMENTS**: Right click instance > Surveys > Final Assessments
2. **ADULT AND JUVENILE REDEPLOY GRANT**: Right click instance > Surveys (as necessary)
3. **JUVENILE PLACEMENTS**: Right click instance > Surveys > Juvenile placements (for juveniles only)
4. **BACKGROUND AT TERMINATION**: Right click instance > Surveys > Background at Termination
5. **CASE CLOSURE AND TERMINATION**: Right click instance > Surveys > Case Closure and Termination

*\*\*\*Open all surveys in New and Partial status, answer any remaining questions, then mark each survey Complete.*

## **PROBLEM SOLVING COURT CLIENTS**

### **START CREATING THE SUREY SET DURING EVALUATION FOR ELIGIBILITY**

1. **DEMOGRAPHICS:** Right click client > Surveys > Demographics
2. **BACKGROUND AT SCREENING:** Right click instance > Surveys > Background at Screening (finish and Complete to save snapshot)
3. **ACTIVE STATUS:** Right click instance > Surveys > Active Status
4. **INITIAL SCREENING:** Right click instance > Surveys > Initial Screening

**\*\*IF INELIGIBLE / NOT ADMITTED, SKIP TO CASE CLOSURE & TERMINATION\*\***

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### **SURVEYS TO CREATE DURING PROBLEM SOLVING COURT AS NEEDED**

#### **EACH TIME THE CLIENT COMPLETES A PSC PHASE,**

1. Right click instance > Edit > Progress
2. Add a date column and mark the Phase End checkbox
3. Right click the Phase End checkbox > Open survey
4. **END OF PHASE** (up to five of these will be created, one for each phase)

#### **PETITION TO TERMINATE (ON VIOLATION TYPE)**

1. Right click instance > Edit Revocations
2. Add revocation record
3. **PETITION TO TERMINATE (ON VIOLATION TYPE):** Right click on the new PTR record > Surveys > Petition to Terminate (on violation type)

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### **SURVEYS TO CREATE UPON TERMINATION**

1. **FINAL ASSESSMENTS:** Right click instance > Surveys > Final Assessments
2. **ADULT AND JUVENILE REDEPLOY GRANT:** Right click instance > Surveys (as necessary)
3. **BACKGROUND AT TERMINATION:** Right click instance > Surveys > Background at Termination
4. **CASE CLOSURE AND TERMINATION:** Right click instance > Surveys > Case Closure and Termination

*\*\*\*Open all surveys in New and Partial status, answer any remaining questions, then mark each survey Complete.*

## PRETRIAL CLIENTS

### START CREATING THE SUREY SET DURING EVALUATION FOR ELIGIBILITY

1. **DEMOGRAPHICS:** Right click client > Surveys > Demographics
  2. **BACKGROUND AT SCREENING:** Right click instance > Surveys > Background at Screening (finish and Complete to save snapshot)
  3. **OFFENSE AND ARREST:** Right click instance > Surveys > Offense and Arrest
  4. **INTERVIEW/BOND REPORT/RISK ASSESSMENT:** Right click instance > Surveys > Interview/Bond Report/Risk Assessment
  5. **INITIAL COURT APPEARANCE:** Right click instance > Surveys> Initial Court Appearance
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### SURVEYS TO CREATE DURING PRETRIAL COURT AS NEEDED

1. **SUBSEQUENT BOND DETENTION HEARING:** Right click instance > Surveys> Subsequent Bond Detention Hearing
  2. **VIOLATIONS:** Right click on the new PTR record > Surveys > Violations
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### SURVEYS TO CREATE UPON TERMINATION

1. **PRETRIAL RELEASE - WITH OR WITHOUT SUPERVISION:** Right click instance > Surveys > Pretrial Release - With or Without Supervision
2. **SUPERVISION TERMINATION:** Right click instance > Surveys > Supervision Termination
3. **BACKGROUND AT TERMINATION:** Right click instance > Surveys > Background at Termination
4. **CASE DISPOSITION:** Right click instance > Surveys > Case Disposition

*\*\*\*Open all surveys in New and Partial status, answer any remaining questions, then mark each survey Complete.*