

AD-HOC REPORT

User's Guide

and

Sample Templates

January 2016

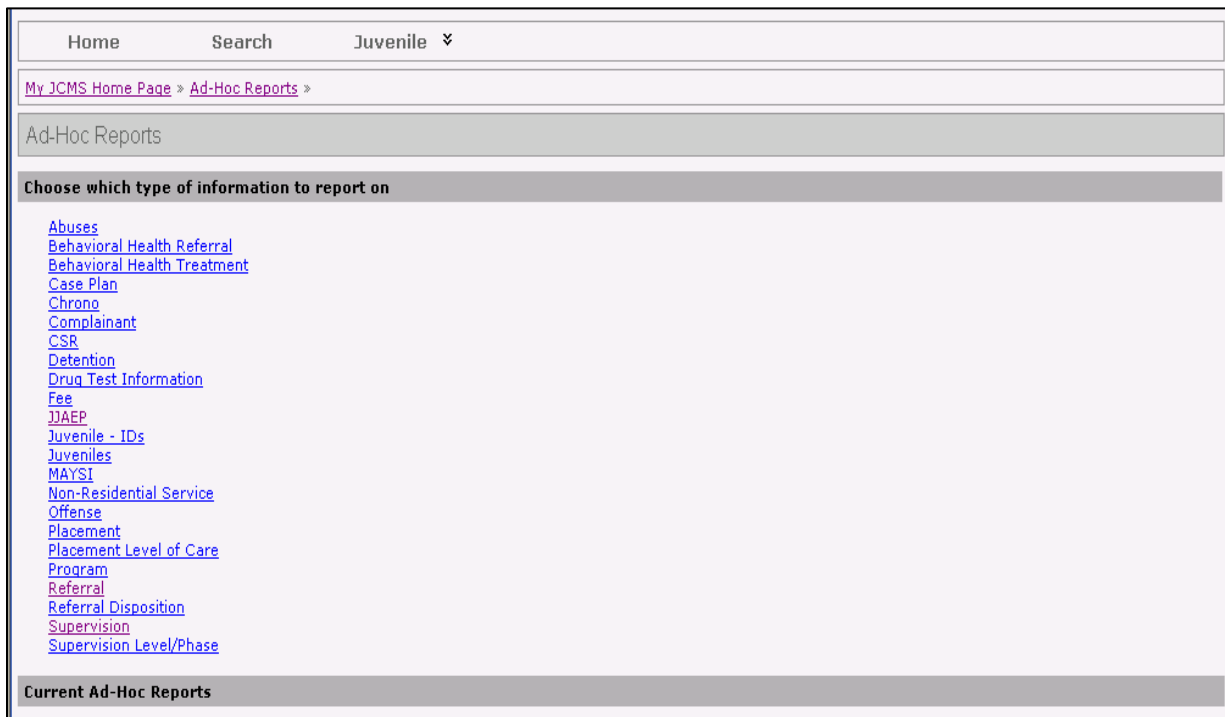
Ad-Hoc Report User's Guide

The Ad-Hoc Report in JCMS allows the user to create a quick report based on specified criteria. For example, you can generate a list of all children referred last year for a first-degree felony. The report criteria can be saved for future recall. When reports are saved, they are called templates.

Creating an Ad-Hoc Report

To create a template, do the following:

- From the Welcome Page, select Ad-Hoc Reports from the Other Tasks box.



Choose which Type of Information to Report on

- On the initial Ad-Hoc Reports screen, select the type of information you are searching from the list provided.
- Once you select the type of information to report on, you will be asked to enter a title for the report.
- The report title will be used as the template name when the template is saved.
- The second section on this initial screen is the **Current Ad-Hoc Reports**. This section contains all previously saved templates. These templates can be retrieved and modified if needed.
- As an example, we will create an Ad-Hoc Report for Referrals Disposed in January 2014.

Add New Ad-Hoc Report

Type of information: **Referral Disposition**

* Report Title:

Save
[Cancel](#)

- After the Report Title is saved, you will see the following screen:

Report: **Referrals Disposed in January 2014**

[Run](#) | [CSV](#) | [Copy](#) | [Delete](#)

Summary

Type of information: **Referral Disposition**
Report Title: **Referrals Disposed in January 2014**

Criteria Fields

Add Selection Criteria For Field: ▼ Add New

Print Fields

Edit

Field	Sort Order
Juvenile Full Name	Ascending
Juvenile PID	



Criteria Fields

In the **Criteria Fields** section you will specify the fields and criteria that will be used to locate the desired records.

- Click the down arrow in the **Add Selection Criteria for Field** box. Select **Referral Disposition Date** and click Add New.
- You will see the following **Add Criteria: Referrals Disposed in January 2014** screen:

Add Criteria: Referrals Disposed in 2014

Field: **Referral Disposition Date**

Operator:

Value 1:

*Operation String

Note: you must "Add" your criteria before saving

- The **Field** section is already populated with the criteria selected from the previous screen.
- Click the down arrow in the **Operator** box. **Operator** is used to define the relationship between the search field and the criteria. **Operator** options are:
 1. **Equal** – The response will match the criteria exactly.
 2. **Less Than** – The response will be less than the criteria listed. **Less Than** could be used if the criteria were a numeric response (i.e. age), or a date response. With a date response, **less than** would be used to search for an event that occurred *prior to* the date listed.
 3. **Less Than or Equal To** - The response will be less than or equal to the criteria listed. **Less Than or Equal To** could be used if the criteria were a numeric response (i.e. age), or a date response.
 4. **More Than** – The response will be greater than the criteria listed. **More Than** could be used if the criteria were a numeric response or a date response. With a date response, **greater than** would be used to search for a date *after* the date listed.
 5. **More Than or Equal To** – The response will be greater than or equal to the criteria listed. **More Than or Equal To** could be used if the criteria were either a numeric response or a date response.
 6. **Does Not Equal** – The response will exclude the criteria listed.
 7. **Between** – The response will be between a date or a numeric range.
 8. **Is Empty** - No response is given. **Is Empty** is a common response when searching for a placement, supervision, detention etc. that is still open. Scanning on a completed date whose operator is **Is Empty**, would find all records where the completed date is empty (null).
- For our example, select the **Operator** of Between.

Add Criteria: Referrals Disposed in January 2014

Field: **Referral Disposition Date**

Operator: **Between**

Value 1:

Value 2:

*Operation String **Add** **Clear**

Note: you must "Add" your criteria before saving

Save [Cancel](#)

- After the **Operator** is selected, a **Value** box will appear under the **Operator** box. This box is used to specify what value(s) to match when scanning the item specified in the Field option. This criteria box has three possible formats depending on the item selected in the Field option. If the item is a date, then a "date picker" will appear, if the item has specific code values, then a drop down arrow will appear with the possible codes, otherwise the field will allow 'text' to be entered.
- If the operator is **Between**, two **Value** boxes will appear. If the operator is **Is Empty** a box will not display because no additional criteria is required. In our example, we have two **Value** boxes. Click the date picker to select the date range (01/01/2014 and 01/31/2014).

Add Criteria: Referrals Disposed in January 2014

Field: **Referral Disposition Date**

Operator: **Between**

Value 1:

Value 2:

*Operation String **Add** **Clear**

S	M	T	W	T	F	S
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Note: you must "Add" your criteria before saving

Save [Cancel](#)

- Once you have selected **Operator** and **Values**, click Add.
- If more than one **Value** must be specified for a selected item, select the **Operator** of **Equal** a second time and then enter the second criteria in the **Value 1** box. For example, if want to pull children that are either black or white, the sequence would be: select Juvenile Race in the **Field** option on the previous screen. Then on the Add Criteria Screen, select **Equals** in the **Operator**, select Black in the **Value 1** box, click Add, then select the **Operator** of **Equals** again and select White and **Value 1** box. Click Add, then click Save. A single Field can have multiple Values selected.
- Once a Criteria is saved, you will return to the Report Screen. You may continue to add additional Criteria Fields as needed.

Report: Referrals Disposed in January 2014

[Run](#) | [CSV](#) | [Copy](#) | [Delete](#)

Summary
 Type of information: Referral Disposition
 Report Title: Referrals Disposed in January 2014

Criteria Fields

Add Selection Criteria For Field: [Add New](#)

Field	Criteria
Edit Delete Referral Disposition Date	(convert(datetime, convert(varchar, rd.DispositionDate, 101)) between '01/01/2014' and '01/31/2014')

Print Fields

[Edit](#)

Field	Sort Order
Juvenile Full Name	Ascending
Juvenile PID	



Print Fields

- Once all of the Criteria Fields are selected, click the Edit button under **Print Fields** to list the information to be included on the report. **Juvenile Full Name** and **Juvenile PID** are default options for all reports. All reports default to sort by **Juvenile Full Name**. The Sort Order option can be changed by removing Ascending from the **Juvenile Full Name** field and assigning the Sort Order to another field.
- Click **Add Another** to list additional fields to print.
- Continue to add fields by using the **Add Another** option.
- The selected fields will display on the report in the order they are added.
- Once fields have been selected, click Save.
- **The Ad Hoc Report will only return unique matches in the results. Therefore, you must include a Print Field that is unique to each result. For example, in the Referral Disposition Scan, if a juvenile had three referrals disposed in January 2014, but you only selected Juvenile Name and Juvenile PID as the print fields, this juvenile would only be listed once and the report would not be accurate. Likewise, if this same juvenile had three referrals disposed on two different dates in January 2014, then if you only select Juvenile Name, Juvenile PID and Referral Disposition Date as the print fields, this juvenile would only be listed two times – one for each unique Disposition Date and the report would not be accurate. Therefore, you must include a Print Field that is unique to each Result. In this case, use Referral Number.**

Edit Print Fields

*Field: Juvenile PID	Sort Order: Ascending	Remove
*Field: Juvenile Full Name	Sort Order:	Remove
*Field: Referral Disposition Date	Sort Order:	Remove
*Field: Referral Number	Sort Order:	Remove

Generating the Report

- Once the template is saved, Click Run to display the results or click CSV to save the results into a CSV file. CSV files can be opened in Microsoft Excel.

Report: Referrals Disposed in January 2014

[Run](#) | [CSV](#) | [Copy](#) | [Delete](#)

Summary

Type of information: Referral Disposition
Report Title: Referrals Disposed in January 2014

Criteria Fields

Add Selection Criteria For Field: [Add New](#)

	Field	Criteria
Edit Delete	Referral Disposition Date	(convert(datetime, convert(varchar, rd.DispositionDate, 101)) between '01/01/2014' and '01/31/2014')

Print Fields

[Edit](#)

Field	Sort Order
Juvenile PID	Ascending
Juvenile Full Name	
Referral Disposition Date	
Referral Number	

Copying a Template

- If you have a basic template that you would like to make changes to for a new report, choose the Copy option. This option allows you to assign a new name to an existing template and once saved, you can modify as needed. In our example, if we wanted to recreate this template for Referrals Disposed in February 2014, we would do the following:
 - Select the report from the list of Current Ad-Hoc Reports.
 - Click Copy.
 - Change the Report Title (Referrals Disposed in February 2014).
 - Select to Edit the existing Referral Disposition Date entry.
 - Clear the current Operator String for the January dates.
 - Select the new date range for February.
 - Click Add and then click Save.

Copy New Ad-Hoc Report

Type of information: Referral
Disposition

*Report Title:

[Copy](#) [Cancel](#)

Change Report Title

Report: Referral Dispositions in February 2014

[Run](#) | [CSV](#) | [Copy](#) | [Delete](#)

Summary
Type of information: Referral Disposition
Report Title: Referral Dispositions in February 2014

Criteria Fields
Add Selection Criteria For Field: [Add New](#)

Field	Criteria
Edit Delete Referral Disposition Date	(convert(datetime, convert(varchar, rd.DispositionDate, 101)) between '01/01/2014' and '01/31/2014')

Print Fields
[Edit](#)

Field	Sort Order
Referral Date	Ascending
Juvenile Full Name	
Referral Source	
Referral Type	
Juvenile PID	



Select Edit

Edit Criteria: Referral Dispositions in February 2014

Field: Referral Disposition Date
Operator:

Value 1:

*Operation String [Add](#) [Clear](#)

(convert(datetime, convert(varchar, rd.DispositionDate, 101)) between '01/01/2014' and '01/31/2014')

Note: you must "Add" your criteria before saving

[Save](#) [Cancel](#)



Clear Current Operator String

Edit Criteria: Referral Dispositions in February 2014

Field: Referral Disposition Date
Operator: Between

Value 1: 02/01/2014

Value 2: 02/28/2014

*Operation String [Add](#) [Clear](#)

Note: you must "Add" your criteria before saving

[Save](#) [Cancel](#)

Enter new values for February

Sample Ad-Hoc Templates

Referrals Pending Disposition

Information to Report On: Referral

Report Title: **Referrals Pending Disposition**

1. Criteria Field: Primary Disposition
Operator: Is Empty (Click Add. Click Save.)

Suggested Print Fields

1. Referral Type
2. Referral Date
3. Referral Number
4. Juvenile Primary Probation Officer Last Name
5. Offense Description

2014 Formal Referrals for Felony Offenses*

*Scan for multiple offenses based on Offense Level and Degree

Information to Report On: Referral

Report Title: **2014 Formal Referrals for a Felony Offense**

1. Criteria Field: Referral Date
Operator: Between
Value 1: 01/01/2014
Value 2: 12/31/2014 (Click Add. Click Save.)
2. Criteria Field: Offense IOI
Operator: Equals
Value 1: Primary (Click Add. Click Save.)
3. Criteria Field: TJJD Stat Category
Operator: Between
Value 1: 001
Value 2: 012 (Click Add. Click Save.)
4. Criteria Field: Referral Type
Operator: Equal
Value 1: Formal (Click Add. Select another **Operator**.)
Operator: Equal
Value 2: Paper Formalized (Click Add. Click Save.)
5. Criteria Field: Referral County
Operator: Equal
Value 1: Select your county from the dropdown menu. (Click Add. Click Save.)

Suggested Print Fields

1. Referral Date
2. TJJD Stat Category
3. Referral Number

2014 Formal Referrals for Felony Sexual Assault Offenses*

*Scan for multiple offenses based on Statistical Report Category

Information to Report On: Referral

Report Title: **2014 Referrals for Felony Sexual Assault Offenses (Stat Column 003)**

1. Criteria Field: Referral Date
Operator: Between
Value 1: 01/01/2014
Value 2: 12/31/2014 (Click Add. Click Save.)
2. Criteria Field: TJJD Stat Category
Operator: Equals
Value 1: 003 (Click Add. Click Save.)
3. Criteria Field: Referral Type
Operator: Equals
Value 1: Formal (Click Add. Select a second **Operator**.)
Operator: Equals
Value 2: Paper Formalized (Click Add. Click Save.)

Suggested Print Fields

1. Referral Date
2. TJJD Stat Category
3. Offense Description
4. Referral Number

2014 Formal Referrals for Aggravated Assault with Deadly Weapon*

*Scan for a single offense

Information to Report On: Referral

Report Title: **2014 Formal Referrals for Aggravated Assault w/Deadly Weapon**

1. Criteria Field: Referral Date
Operator: Between
Value 1: 01/01/2014
Value 2: 12/31/2014 (Click Add. Click Save.)
2. Criteria Field: Offense Description
Operator: Equals
Value 1: Select Agg Assault w/Deadly Weapon (Click Add. Click Save.)
3. Criteria Field: Referral Type
Operator: Equals
Value 1: Formal (Click Add. Select a second **Operator**.)
Operator: Equals
Value 2: Paper Formalized (Click Add. Click Save.)

Suggested Print Fields

1. Referral Date
2. Offense Description
3. Referral Number

2014 Programs Funded with N Grant

Information to Report On: Program

Report Title: **Juveniles in a Program anytime in 2014 – Funded with N Grant**

1. Criteria Field: Program Begin Date
Operator: Less Than or Equal To
Value 1: 12/31/2014 (Click Add. Click Save.)
2. Criteria Field: Program End Date
Operator: More Than or Equal To
Value 1: 01/01/2014 (Click Add. Select another **Operator**.)
Operator: Is Empty (Click Add. Click Save.)
3. Criteria Field: Program Funding Source
Operator: Equal
Value 1: N Grant Mental Health Services*

*Funding Source codes are county configurable. Therefore, your list of funding sources may differ from this example. Select the appropriate N Grant code from your dropdown menu.

Suggested Print Fields

1. Program Name
2. Program Begin Date
3. Program End Date
4. Program Outcome
5. Program Funding Source

2014 Programs Funded with S Grant Prevention and Intervention

Information to Report On: Program

Report Title: **Juveniles in a Program anytime in 2014 – Funded with S Grant**

1. Criteria Field: Program Begin Date
Operator: Less Than or Equal To
Value 1: 12/31/2014 (Click Add. Click Save).
2. Criteria Field: Program End Date
Operator: More than or Equal To
Value 1: 01/01/2014 (Click Add. Select another **Operator**.)
Operator: Is Empty (Click Add. Click Save.)
3. Criteria Field: Program Funding Source
Operator: Equal
Value 1: S Grant - Prevention and Intervention* (Click Add. Click Save.)

*Funding Source codes are county configurable. Therefore, your list of funding sources may differ from this example. Select the appropriate S Grant code from your dropdown menu.

Suggested Print Fields

1. Program Name
2. Referral Type
3. Program Begin Date
4. Program End Date
5. Program Outcome
6. Program Funding Source

Status Offenders Detained in 2014

Information to Report On: Detention

Report Title: **Status Offenders Detained in 2014**

1. Criteria Field: Detention Admission Date
Operator: Less Than or Equal To
Value 1: 12/31/2014 (Click Add. Click Save.)
2. Criteria Field: Detention Released Date
Operator: More than or Equal To
Value 1: 01/01/2014 (Click Add to add another **Operator**).
Operator: Is Empty (Click Add. Click Save.)
3. Criteria Field: Offense IOI
Operator: Equals
Value 1: Primary (Click Add. Click Save.)
4. Criteria Field: Offense Description
Operator: Equals
Value 1: Failure to Attend School (Click Add. Select another **Operator**).
Operator: Equals
Value 2: Runaway (Click Add. Select another **Operator**).
Operator: Equals
Value 3: Truancy (Click Add. Click Save.)

Suggested Print Fields

1. Detention Admission Date
2. Detention Release Date
3. Offense Description
4. Detention Actual Stay

Status Offenders Detained more than 24 hours in 2014

Information to Report On: Detention

Report Title: **Status Offenders Detained in 2014 for more than 24 Hours**

1. Criteria Field: Detention Admission Date
Operator: Less Than or Equal To
Value 1: 12/31/2014
2. Criteria Field: Detention Released Date
Operator: More Than or Equal To
Value 1: 01/01/2014 (Click Add. Select another **Operator**).
Operator: Is Empty. Click Add. Click Save.
3. Criteria Field: Offense IOI
Operator: Equal
Value 1: Primary (Click Add. Click Save.)
4. Criteria Field: Offense Description
Operator: Equals
Value 1: Failure to Attend School (Click Add. Select another **Operator**).
Operator: Equals
Value 2: Runaway (Click Add. Select another **Operator**).
Operator: Equals
Value 3: Truancy (Click Add. Click Save.)
5. Criteria Field: Detention Actual Stay
Operator: More than or Equal To
Value 1: 2 (Click Add. Click Save.)

Suggested Print Fields

1. Detention Admission Date
2. Detention Release Date
3. Offense Description
4. Detention Actual Stay

Juveniles Placed into Detention on a Specified Date (5/10/2014)

This report lists juveniles who were admitted into detention on a specified date.

Information to Report On: Detention

Report Title: **Juveniles Placed into Detention on May 10, 2014**

1. Criteria Field: Detention Admission Date
Operator: Equals
Value 1: 05/10/2014 (Click Add. Click Save.)

Suggested Print Fields

1. Detention Admission Date
2. Detention Release Date
3. Offense Description
4. Detention Actual Stay

Juvenile in Detention on a Specific Date (5/10/2014)

This report lists juveniles who were in detention on a specified date regardless of their admission date.

Information to Report On: Detention

Report Title: **Juveniles in Detention on May 10, 2014**

1. Criteria Field: Detention Admission Date
Operator: Less Than or Equal To
Value 1: 05/10/2014
2. Criteria Field: Detention Released Date
Operator: More than or Equal To
Value 1: 05/10/2014 (Click Add. Select another **Operator**).
Operator: Is Empty. (Click Add. Click Save.)

Suggested Print Fields

1. Detention Admission Date
2. Detention Release Date
3. Offense Description
4. Detention Actual Stay

Juveniles Adjudicated to Probation in 2014

Information to Report On: Referral Disposition

Report Title: **Juveniles Adjudicated to Probation in 2014**

1. Criteria Field: Referral Disposition Date
Operator: Between
Value 1: 01/01/2014
Value 2: 12/31/2014 (Click Add. Click Save.)
2. Criteria Field: Referral Disposition Primary Disposition*
Operator: Equals
Value 1: Adjudicated – Placed on Probation (Click Add. Select another **Operator**.)
Operator: Equals
Value 2: Adjudicated to Probation with Placement (Click Add. Click Save.)
3. Criteria Field: Offense DOI
Operator: Equals
Value 1: Primary (Click Add. Click Save.)

Suggested Print Fields

1. Referral Disposition Date
2. Referral Disposition Primary Disposition
3. Referral Number
4. Offense Description

*Referral Disposition Primary Disposition codes are county configurable. Therefore, your list of dispositions may differ from this example. Select all of the Adjudicated to Probation Disposition codes from the dropdown list.

Juveniles Committed to TJJD in 2014

Information to Report On: Referral Disposition

Report Title: **Juveniles Committed to TJJD in 2014**

1. Criteria Field: Referral Disposition Date
Operator: Between
Value 1: 01/01/2014
Value 2: 12/31/2014 (Click Add. Click Save)
2. Criteria Field: Referral Disposition Primary Disposition*
Operator: Equals
Value 1: TJJD Determinate Commitment (Click Add. Select another Operator.)
Operator: Equals
Value 2: TJJD Indeterminate Commitment (Click Add. Select another Operator.)
Operator: Equals
Value 3: Prob Revoked – Determinate Commit (Click Add. Select another Operator.)
Operator: Equals
Value 4: Prob Revoked – Indeterminate Commit (Click Add. Click Save.)
3. Criteria Field: Offense DOI
Operator: Equals
Value 1: Primary (Click Add. Click Save.)

Suggested Print Fields

1. Referral Disposition Date
2. Referral Disposition Primary Disposition
3. Referral Number
4. Offense Description

**Referral Disposition Primary Disposition codes are county configurable. Therefore, your list of dispositions may differ from this example. Select all of the TJJD Commitment codes from the dropdown list.

All Open Supervisions

Information to Report On: Supervision

Report Title: **All Open Supervisions**

1. Criteria Field: Supervision End Date
Operator: Is Empty (Click Add. Click Save.)

Suggested Print Fields

1. Supervision Type
2. Supervision Begin Date
3. Supervision Estimated End Date
4. Referral Number

All Probation Supervisions Closed in 2014

Information to Report On: Supervision

Report Title: **All Probation Supervisions Closed in 2014**

1. Criteria Field: Supervision Type
Operator: Equals
Value 1: Court Ordered Probation
2. Criteria Field: Supervision End Date
Operator: Between
Value 1: 01/01/2014
Value 2: 12/31/2014

Suggested Print Fields

1. Supervision Type
2. Supervision Begin Date
3. Supervision End Date
4. Supervision Outcome
5. Referral Number

All Juveniles in Placement Anytime During 2014

Information to Report On: Placement

Report Title: **All Juveniles in Placement Anytime During 2014**

1. Criteria Field: Placement Begin Date
Operator: Less Than or Equal To
Value 1: 12/31/2014 (Click Add. Click Save.)
2. Criteria Field: Placement End Date
Operator: More Than or Equal To
Value: 01/01/2014 (Click Add. Select another **Operator**.)
Operator: Is Empty (Click Add. Click Save.)

Suggested Print Fields

1. Placement Facility
2. Placement Begin Date
3. Placement Estimated End Date
4. Placement End Date
5. Placement Days

Templates to Find Errors in Data Entry

Formal Referrals for Invalid Offenses in 2014

JCMS contains offense descriptions that are not true offenses. Examples include: Violation of Court Order – DTA; Violation of Court Order DPP; Violation of TJJD Placement and TJJD Warrant. While these offenses are easily identifiable from the Offense list because they contain a Citation, Statute and Level & Degree of N/A, they can still be used in Formal, Paper Formalized and Paper Complaint Referrals.

The scan below identifies all Formal and Paper Formalized Referrals in 2014 for invalid offenses. Each of these referrals should be reviewed and corrected.

Information to Report On: Referral

Report Title: **2014 FM and PF Referrals for Invalid Offenses**

1. Criteria Field: Referral Date
Operator: Between
Value 1: 01/01/2014
Value 2: 12/31/2014 (Click Add. Click Save.)
2. Criteria Field: Referral Type
Operator: Equals
Value 1: Formal (Click Add. Select another **Operator**.)
Operator: Equals
Value 1: Paper Formalized (Click Add. Click Save.)
3. Criteria Field: Offense Level/Degree
Operator: Equals
Value 1: N/A (Click Add. Click Save.)

Suggested Print Fields

1. Referral Date
2. Referral Type
3. Offense Description
4. Offense Level and Degree
5. Referral Number

Paper Complaints for Invalid Offenses in 2014

This scan is similar to the previous scan, Formal Referrals for Invalid Offenses in 2014. The difference is that PA Referrals do not have Referral Dates. They have Referral Complaint Dates.

The scan below identifies all Paper Complaint Referrals in 2014 for invalid offenses. Each of these referrals should be reviewed and corrected.

Information to Report On: Referral

Report Title: **2014 PA Referrals for Invalid Offenses**

4. Criteria Field: Referral Complaint Date
Operator: Between
Value 1: 01/01/2014
Value 2: 12/31/2014 (Click Add. Click Save.)
5. Criteria Field: Referral Type
Operator: Equals
Value 1: Paper Complaint (Click Add. Click Save.)
6. Criteria Field: Offense Level/Degree
Operator: Equals
Value 1: N/A (Click Add. Click Save.)

Suggested Print Fields

6. Referral Date
7. Referral Type
8. Offense Description
9. Offense Level and Degree
10. Referral Number

PA Referrals given an Invalid Referral Disposition in 2014

Paper Complaint referrals should only be given Referral Dispositions designated as Paper Complaint Dispositions. The standard list of Paper Complaint Dispositions is:

- No Intake, Probable Cause – Department
- No Intake, No Probable Cause – Department
- No Intake, Probable Cause – Prosecutor
- No Intake, No Probable Cause - Prosecutor

Because Actions and Dispositions are county configurable, you should review your list of Actions and Dispositions to identify any additional Paper Complaint Dispositions created by your department. Those additional Actions and Dispositions should be included in this scan.

To see a list of your department's Actions and Dispositions and their 'disposition types', do the following:

- From the Welcome Screen of JCMS, select Maintenance.
- Select Actions and Dispositions.
- Review the Disposition Type column. All Actions and Dispositions with the Decision Type of **Paper Complaint Disposition** are appropriate for Paper Complaint (PA) referrals.

The scan below identifies all PA Referrals in 2014 with dispositions that are not designated as a **Paper Complaint Disposition**.

Information to Report On: Referral Disposition

Report Title: **PA Referrals given an Invalid Referral Disposition in 2014**

1. Criteria Field: Referral Type
Operator: Equals
Value 1: Paper Complaint (Click Add. Click Save.)
2. Criteria Field: Referral Disposition Date
Operator: Between
Value 1: 01/01/2014
Value 2: 12/31/2014 (Click Add. Click Save.)
3. Criteria Field: Referral Disposition Primary Disposition
Operator: Does Not Equal
Value 1: No Intake, No Probable Cause - Department (Click Add. Click Save.)
4. Criteria Field: Referral Disposition Primary Disposition
Operator: Does Not Equal
Value 1: No Intake, Probable Cause – Department (Click Add. Click Save.)
5. Criteria Field: Referral Disposition Primary Disposition
Operator: Does Not Equal
Value 1: No Intake, No Probable Cause - Prosecutor (Click Add. Click Save.)
6. Criteria Field: Referral Disposition Primary Disposition
Operator: Does Not Equal
Value 1: No Intake, Probable Cause – Prosecutor (Click Add. Click Save.)
7. Criteria Field: Offense DOI
Operator: Equals
Value 1: Primary (Click Add. Click Save.)
8. Continue to select the Criteria Field of Referral Disposition Primary Disposition for each of your departments Paper Complaint Dispositions.

Suggested Print Fields

- | | |
|---|---|
| 1. Referral Type | 2. Referral Disposition Date |
| 2. Referral Disposition Primary Disposition | 4. Referral Number 5. Offense Description |

FM and PF Referrals given a Paper Complaint Disposition in 2014

The scan below identifies all FM and PF Referrals in 2014 with dispositions that are designated as a **Paper Complaint Disposition**. Review these referrals. Either change the Referral Type to PA, or select a different Disposition.

Information to Report On: Referral Disposition

Report Title: **FM and PF Referrals given Paper Complaint Dispositions in 2014**

1. Criteria Field: Referral Type
Operator: Equals
Value 1: Formal (Click Add. Select another **Operator**.)
Operator: Equals
Value 2: Paper Formalized (Click Add. Click Save.)
2. Criteria Field: Referral Disposition Date
Operator: Between
Value 1: 01/01/2014
Value 2: 12/31/2014 (Click Add. Click Save.)
3. Criteria Field: Referral Disposition Primary Disposition
Operator: Equals
Value 1: No Intake, No Probable Cause – Prob Dept – PA ONLY (Click Add. Select another **Operator**.)
Operator: Equals
Value 1: No Intake, Probable Cause – Prob Dept – PA ONLY (Click Add. Click Select another **Operator**.)
Operator: Equals
Value 1: No Intake, No Probable Cause – Prosecutor – PA ONLY (Click Add. Select another **Operator**.)
Operator: Equals
Value 1: No Intake, Probable Cause – Prosecutor – PA ONLY (Click Add. Click Save.)

Continue to select the Criteria Field of Referral Disposition Primary Disposition for each of your departments Paper Complaint Dispositions.

Suggested Print Fields

1. Referral Type
2. Referral Disposition Date
3. Referral Disposition Primary Disposition
4. Referral Number
5. Offense Description

FM, PF and PA Referrals with incorrect Originating Jurisdiction/County

Each Formal, Paper Formalized and Paper Complaint Referral should list the Originating Jurisdiction as **County** on the Referral Screen. Each Formal, Paper Formalized and Paper Complaint Referral should then list a county within your department's jurisdiction as the Originating Jurisdiction - County.

The scan below identifies all formal referrals (FM, PF and PA Referral Types) with a county other than your own as the Referral County. Any referrals listed on this report should be corrected to list a county within your jurisdiction as the Originating Jurisdiction County (Referral County).

Information to Report On: Referral

Report Title: **2014 FM, PF and PA Referrals with an Incorrect or Blank Originating Jurisdiction**

1. Criteria Field: Referral Date
 Operator: Between
 Value 1: 01/01/2014
 Value 2: 12/31/2014 (Click Add. Select another **Operator**.)
 Operator: Is Empty (Click Add. Click Save.)
2. Criteria Field: Referral Complaint Date
 Operator: Between
 Value 1: 01/01/2014
 Value 2: 12/31/2014 (Click Add. Select another **Operator**.)
 Operator: Is Empty (Click Add. Click Save.)
3. Criteria Field: Referral Type
 Operator: Equals
 Value 1: Formal (Click Add. Select another **Operator**.)
 Operator: Equals
 Value 1: Paper Formalized (Click Add. Select another **Operator**.)
 Operator: Equals
 Value 1: Paper Complaint (Click Add. Click Save.)
4. Criteria Field: Referral County
 Operator: Does Not Equal
 Value 1: Select your County. (Click Add. Select another Operator)
 Value 2: Is Empty (Click Add. Click Save.)

If your department has multiple counties, repeat the Field Criteria, Operator and Value for each of your counties. Each county will be listed separately under its own Criteria Field.

Suggested Print Fields

1. Referral Type
2. Referral Date
3. Referral Source
4. Referral County
5. Referral Number

Offenses Not Attached to a Referral

The scan below identifies all Offense Screens that are not attached to a Referral.

Information to Report On: Offense

Report Title: **Offenses Not Attached to a Referral**

1. Criteria Field: Offense Date
Operator: Less Than or Equal To
Value 1: Current Date (Click Add. Click Save.)
2. Criteria Field: Referral Date
Operator: Is Empty (Click Add. Click Save.)
3. Criteria Field: Referral Complaint Date
Operator: Is Empty (Click Add. Click Save.)

Suggested Print Fields

1. Offense Date
2. Offense Description