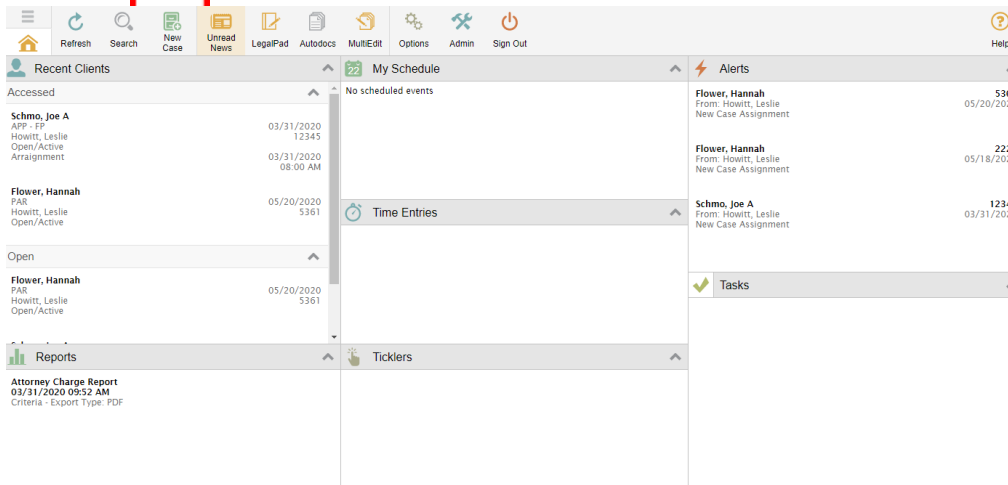1. Create a new case

2. Enter all or part of client's name into Name Search.

   a. If a new client, press the ⊕ button.

   b. If the client is already in the system, press the 🗐 button

3. The client's name and information box is on the right-hand side of the screen. This cannot be updated or changed until the case information has been input and saved.


4. When creating a case, information in the red boxes is required.
   a. The flags section (blue box) should be updated whenever an investigator or expert is used throughout the case. It can also be used to flag conflicts, conflict resolved, 402 reductions and any other thing you want to be able to easily report on.
   b. The "factors" sections (yellow boxes) should not be used as it is difficult to run reports on them. If there is a factor you would like to track in these boxes, notify me and we will add it as a case flag instead

Note: When a box displays as green, it means it has not been saved to the system. Save often.

5. Once a case has been created and saved, information can be entered on Charges, Schedule, Time, Ticklers, Motions, People, Notes, and Documents using the tabs at the bottom.
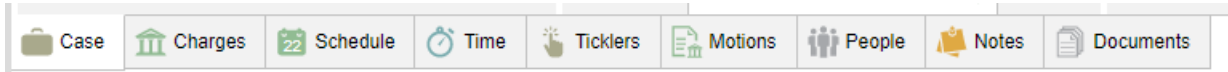
6. Charges – To add a charge, click "Add" at the top of the screen.
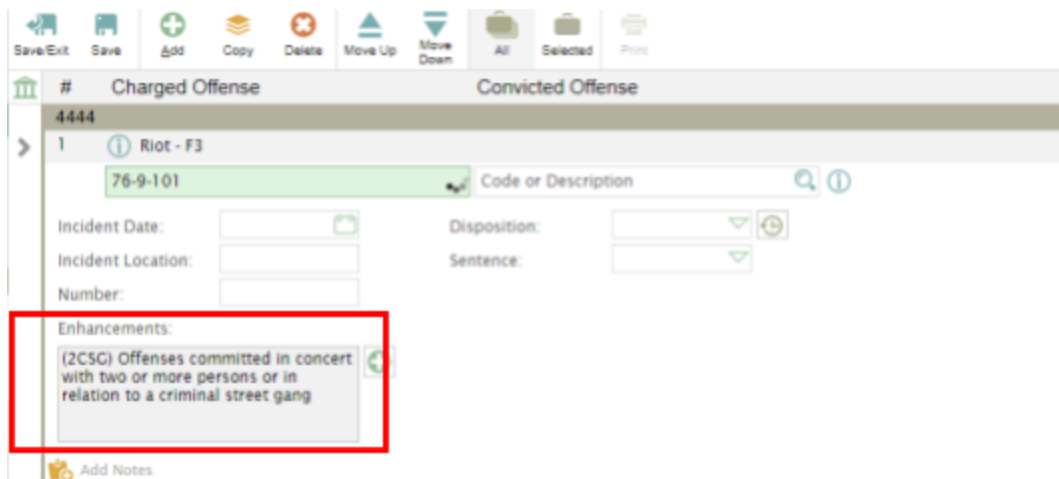   a. Start by entering the charge name and hit enter to search. Select relevant charge if it is in the list.
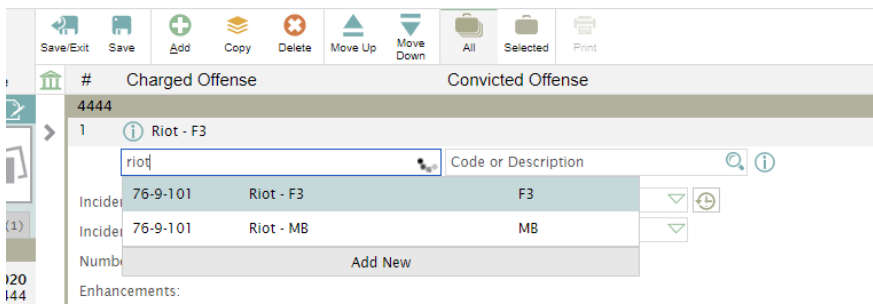
   i. If the charge is not in the list, please notify me instead of adding a new charge yourself, as I want these to stay consistent throughout the defenderData systems.
   ii. Add any relevant enhancements. If you need an enhancement that does not appear on the list, please notify me instead adding a new enhancement yourself.
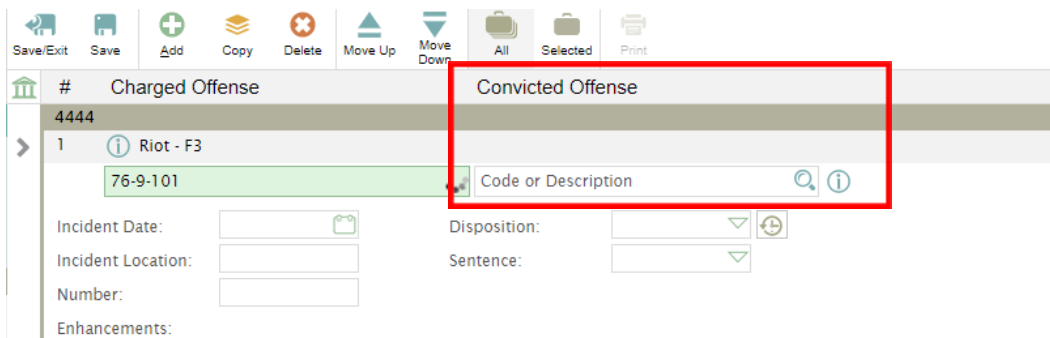   b. Note: The second "Code or Description" box is for entering in the convicted charge. This can be useful for

understanding where there was a reduction in charges.
   c.

7. Schedule – Add any upcoming hearings and appointments by clicking the "Add" button at the top of the screen. Note: Please do not do time tracking in the schedule tab. That must be done in the time tab.

8. Time – This tab is not required for IDC reporting but can be very useful for internal management. You can see which cases take more time.

   a. You can either add time events in the Time tab of each case or you can add events to multiple cases at once using the ⏱ button on the home screen.
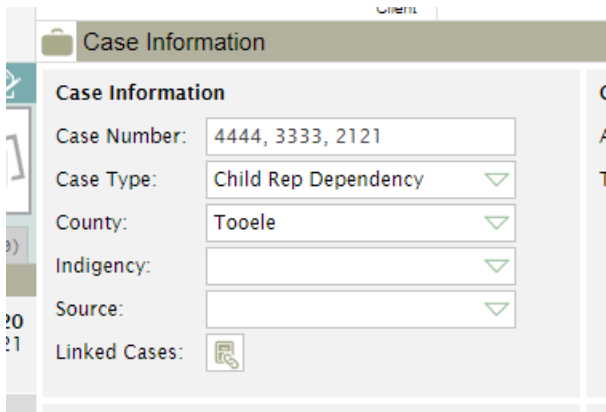

   b. If adding in the bulk screen, make sure to select "CS – Case Specific".
   c. You can manually enter time or use the stopwatch feature to track a current task.

9. Ticklers, Motions, People, Notes, and Documents are all optional tabs. You may find them useful. The IDC will not be running reports or pulling data from any of these tabs.

a. Ticklers can be used to set reminders, such as 402 reduction reminders, for the future.
b. People can be used to add co-defendants and can do a conflict check.
c. Documents can be used to store case files. You can also auto-generate form letters filled with client name, case number, or any other field. Contact me if you want to know more about this feature.
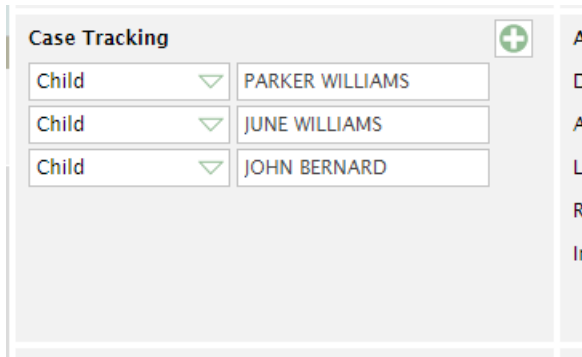
Child Welfare Specific

1. For child welfare cases, only open one case per parent (instead of one case per child). Put all children's case numbers together in the case number field. You can also add the children's names in the case number field if that is useful for you.

2. Add the children's names by clicking "+" in case tracking, selecting child, and then adding the child's name. This can be done for multiple children in one case.

3. At the beginning of a child welfare case, add three charges to the charge tab – abuse, neglect, and dependency. When the judge dismisses any of these charges, mark them as "dismissed by judge".

Juvenile Delinquency Specific

1. For juvenile delinquency cases, enter an entire incident as one case, entering the case number as follows:

Case Information

Case Information

Case Number:	12345 (001- 004)
Case Type:	Juvenile ▽
County:	Iron ▽
Indigency:	▽
Source:	▽
Linked Cases:	