INTERSTATE COMMISSION FOR ADULT OFFENDER SUPERVISION

Training Bulletin 8-2008*i*
Initiating Activities from the Offender Profile Screen
Issued: December 4, 2008
Revised: N/A

ENSURING PUBLIC SAFETY FOR THE 21ST CENTURY

ICAOS

The "Assistance" screen, available from the Assistance Tab in ICOTS, is the most prominent and easily accessible screen for users to initiate activities for ICOTS offenders. However, many users realize when attempting to create a Transfer Request or a Request for Reporting Instructions based on a prior case, this method isn't sufficient as at many times the record a user is looking to select does not populate due to a 100 records limit when selecting the relating case. This is due to the fact that this function is designed to pull records from an entire state, not to scope results to the user.

1. Is the Transfer Request you wish to create...

○ for an offender for whom no RFRI has been submitted by your state?
◉ for an offender for whom your state has submitted an RFRI?
○ following a rejection of a previous Transfer Request by the receiving state?

Choose a Request for Reporting Instructions

	ICOTS Case ▲ Number	ICOTS Offender Number	Offender Last Name	Offender First Name	Primary DOB
○	16961	16321	Makeit	Willie	09/04/1960
○	17081	16441	Offender	RePete	08/14/1980
○	17301	16641	Brown	Buster	08/15/1985
○	20165	19325	Duck	Donald	01/01/2001
○	20704	19784	smith	john	01/04/1951

In response to this issue, ICOTS also allows for all activities to be initiated from the "Offender Profile "screen. Available from the Compact Cases tab, the user first selects a case, and then makes a selection to create an activity. This is contrary to how the activities are initiated from the Assistance Screen where the user selects the activity, then the case. Most recently added are the options to initiate a Transfer Request and a Request for Reporting Instructions which remedies the issue of ICOTS returning a limiting number of records for activities initiated from the "Assistance Screen."

Creating Activities from the Offender Profile
Under the "Compact Cases" tab from the "Offender Profile" screen, a drop down menu will appear for interested users when selecting a specific compact case. Available options of activities from the "Offender Profile" are limited and dependant to the user based on his or her Level of Interest in that offender's case as well as the status of the case. As the Receiving User of an accepted case, all supervision activities are available to be initiated directly from this screen.

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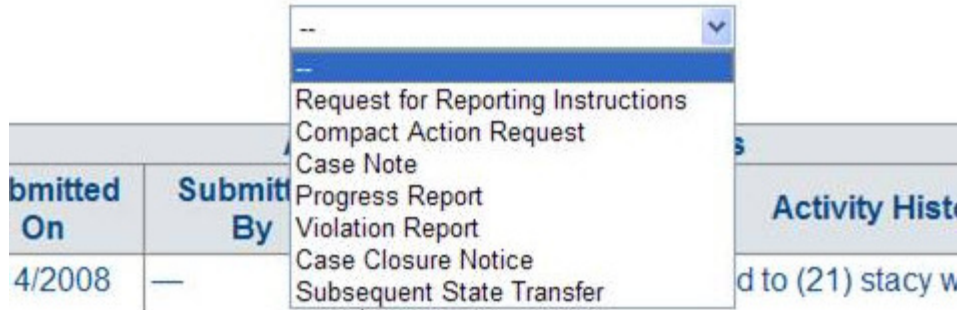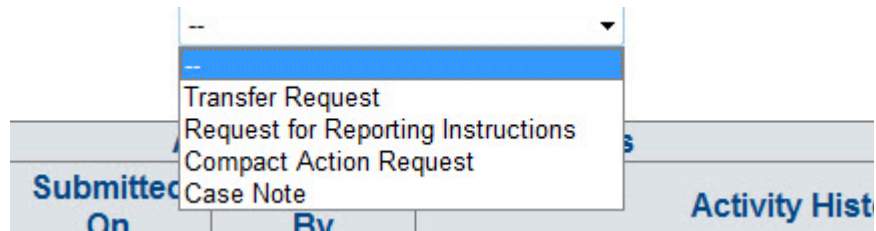Issued: December 4, 2008
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+ **Initiating Activities from
the Offender Profile Screen**

+ **ISSUED:** December 4, 2008
+ **REVISED:** N/A

+ **ISSUED BY:**
  - Executive Director,
    Harry Hageman
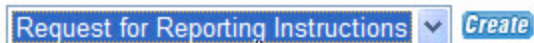 - Training Committee Chair,
    Dori Ege

As a supervising user in the Sending State (Sending User), there are options for creating Case Notes, Compact Action Requests as well as options for initiating a Transfer Request or a Request for Reporting Instructions for pending cases.

Initiating theses initial compact case activities within the Compact Cases tab of the Offender Profile ensures the user is creating the activity within the case and not creating a duplicate case for the offender.

Initiating a Request for Reporting Instructions
Choices available to the user when selecting the Reporting Instructions option are dependent on the status of the offender's case. The possible choices available to the user are:

The selection of the reason for the request will determine the actions of the system. If the user chooses, "the first request to allow an offender to proceed to the receiving state?" a new case will be created. All other choices are going to prompt additional questions confirming the relationship to a previously submitted case and then take the user to the progress page where each category in the Request for Reporting Instructions activity is completed by clicking each green "Start" button.

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Initiating a Transfer Request

There are two choices available to the user when selecting the Transfer Request option to create this activity from the "Offender Profile" screen.

Transfer Request   Create

Is the Transfer Request you wish to create...

⦿ the first request to a receiving state to transfer supervision?
◯ one you wish to base on a previously submitted RFRI?

Similar to creating a request for reporting instructions, the selection of the reason for the Transfer Request will determine the actions of the system. If the user chooses, "the first request to a receiving state to transfer supervision?" a new case will be created. The other choice will prompt additional questions confirming the relationship to a previously submitted RFRI to the same state and then take the user to the progress page where each category in the Transfer Request activity is completed by clicking each green "Start" button.