

# **CIS-ISIS USERS GUIDE**

Corrections Information System -  
Integrated Supervision Information Systems

## **HOW DO I..?**

For Changes or Updates, please contact the FAUG Chair

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# CHAPTER 1.0

## How to Use this Guide

### Section 1.1

**1. Most data entry questions** can be resolved with information that is directly in front of the user. By using the “golden rule” of computer use: (Read The Screen) users can discover the answer looking right back at them.

**2. Explore:** ..... **See Section 3 on Help.**

**3. Local resources:** Know where Training Guides are kept in your office. Or ask an experienced user in your office, such as a FAUG or SOON Representative for advice and/or information about this users’ guide.

**4. Phone:** For technical problems, e-mail the DOC Help Desk at [Helpdesk@doc.state.or.us](mailto:Helpdesk@doc.state.or.us) or call 1-866-531-9600.

**5. Navigation:** There are several methods of navigating through ISIS using options and windows.....

In this guide, brackets < > are used to identify the key you should press; i.e. <5> means press the number 5 key, and <F5> means press Function key 5. ISIS is not mouse friendly, so use your arrow and tab keys instead.

Function keys <F1> through <F12> are used simply by pressing the desired key. Function keys <F13-Shift F1> through <F24-Shift F12> may require that you first press the <Shift> key and while holding it down, press the appropriate function key. See the template for the location of each function key.

**6. Read The Screen!** Menu options, selection numbers and letters may vary; depending upon which work group you belong to. For example, PPO’s may see different menus and choices than support staff or managers.

# CHAPTER 2.0

## Menu Bar

### Section 2.1

Use the Menu Bar to move to other parts of CIS/ISIS. <F11> Menu Bar displays the four selections available at the top of the screen: <1> **Active Jobs**, <2> **WS (Work Station) Options**, <3> **Process Step** and <4> **Info Windows**. Typing the number selects that option. A window containing the choices available within that option will then appear. These choices are identified by letters, and are selected by typing just the appropriate letter on the selection line. **Do NOT use <Enter>**.

<1> Active Jobs	<2> WS Options	<3> Process Step	<4> Info Windows
<A> W/W To Do List*	<N> Add Offender Note (F4)*	<<> Letter key will vary by task, when available!	<<> Letter key will vary task, when available!
<B> W/W Caseload*	<T> Add a To-Do Task		
<C> Offender Information*	<D> W/W System Messages		
	<P> W/W Printed Output		
	<E> User E-Mail Address and Phone		
	<X> PopUp Calendar		
	<Z> Date Calculator		

**NOTE: a Menu Bar option is available ONLY when it is highlighted.**

\*A complete explanation of this feature is provided on page 25.

### Example:

```

2 Active_Jobs  WS_Options  Process_Step  Info_Windows
-----
Select one of
1. W/W To      N Add Offender Note (F4)
2. W/W Ca      T Add a To-Do Task
3. W/W Tr      D W/W System Messages
4. Offend      P W/W Printed Output
5. Fee Ba      E User E-Mail Address and Phone
6. W/W Su      X PopUp Calendar
7. W/W St      Z Date Calculator
8. W/W Ri
9. W/W ST
10. W/W Se
11. W/W Co
12. W/W ST
13. W/W Warrant Request (Offender)
14. W/W Warrant Records (by PO)
    More...

Selection:
Job:

F3=Exit  F4=Prompt  F10=Move to top  F11=Menu bar  F12=Previous menu

```

# CHAPTER 3.0

## Get "HELP"

### Create or Change modes

### Audit Stamp

### Miscellaneous Items

#### Section 3.1 – Get "HELP"

If <F1> Help does not answer your question, ask someone else in your office for assistance. Most offices have a trained support person, commonly a member of SOON (the clerical users group) or FAUG (the PO's user group).

Help Desk 1-866-531-9600 - Call the Help Desk if you are unable to resolve your problem at the local level. When you call, you will be asked for your name, phone number, User-ID, device name, and other similar questions. Your call will be entered as a "trouble ticket" into a tracking system. This will automatically notify the person who has been pre-identified as having the means of helping you, and they should quickly respond to your call. If you have questions or concerns about your "ticket", feel free to call the Help Desk and ask about any progress being made.

#### Section 3.2 - <F2> Audit Stamp

If you want to know who was responsible for the last entry of any information, such as a Treatment date, or a UA, place the cursor on the information you are questioning and press <F2> **Audit** to see who last entered information about this subject.

#### Section 3.3 – Create & Change Modes

When an information entry screen or window first appears, the word **CREATE** will be displayed, usually in the upper right hand corner of the screen. Type in the information you need to, and press <Enter> once. The screen or window will now read **CHANGE**, to indicate that your information has been saved, and you are now able to exit the screen (use <F12 Cancel or simply <Enter> again); OR you may edit what you just typed. If you add to, change, or delete something while in the "CHANGE" mode, make sure you press <Enter> again to save your changes or the new information will not appear.

#### Section 3.4 - Retrieve An Offender Name

After working with an offender in one part of ISIS, and moving to another part of the program (using the F11=Menu Bar) to work on the same offender, press <F9> **Retrieve** to automatically retrieve that offender's name for use in the new program.

### **Section 3.5 - Use "Defaults" To Process Related Groups of Offender Data Entries**

From the Edit Offender Data screen, use <F22-Shift F10> Defaults to display the **CHRONO DEFAULTS** window. Set the Date, time if needed, Place, Person, contact, report, and Key Word fields to meet the criteria of your series of entries, and press <Enter> twice; then <F5> Refresh to set the defaults on the current offender's display.

For example, if you did home visits yesterday, you would set the date to <yesterday's date>, Reason to <H>, and Person to <O>, and <Enter>. Then, on the Offender Summary screen (the alphabetical caseload list) type <2> Change on ALL of the offenders you visited, or tried to visit yesterday, and press <Enter> to go to the first offender, alphabetically. The Chrono header is already for you to enter the text information. You can change the header for the exceptions. Press <Enter> to save the chrono, then press <F12> Cancel to move directly to the next pre-selected offender. Repeat until all are completed. Then change the <F22-Shift F10> Defaults back to the normal settings and <F5> Refresh.

### **Section 3.6 - Accessing Other Menus**

To access another menu, type "MENU" on the selection line, and then press <F4>. This will display a list of menus that you have authority to. Note: all menus that begin with "CC" (such as CCTRAIN) are Community Corrections-based menus. After finding the desired menu within the list, place your cursor on the menu's name, and press <Enter>. You should see that the title and options on the left of your menu have now been replaced by the new menu. Hint: if you already know the name of the menu, simply type "MENU" <Spacebar> and then the name. For example: if you type "MENU CCTRAIN" on the selection line, and press <Enter> you will see the menu for Community Corrections online tutorials!

# CHAPTER 4.0

## Use W/W Caseload & Option <2> to enter chronos

An auto-generated e-mail will be sent to the primary caseload owner(s) whenever someone other than the primary(s) adds a chrono to an offender record. The e-mail will contain the offender's name, SID, and caseload number as well as the UserID of the person who entered the chrono.

### Section 4.1 - Updating Employment Status

1. In the Employed field, type Y for Yes or N for Not employed; enter date offender started employment (not date you made entry in chrono); type in percentage of work week that offender is employed, i.e., fulltime=100%; halftime=50%; 2 days a week=20%; retired, disabled, on SSI/SSD, or a homemaker is entered as 101% and a Y in the employment field is required. Fulltime or part time schooling counts.

```

CMS204I      TRAINING Corrections Information Systems      10:28:16
TISIS15      Edit Offender Data                          CREATE      3/20/07
              3443 LEWIS, PAM                            SAN
SID#: ██████████      DOB: 9/09/1979      ██████████
Status: PostPrison      MED      ID THEFT UN USE VEH
6735 SE ALDER PLACE      Last attempted HV... 8/22/2006
MILWAUKIE, OR 97222      Last completed HV... 8/22/2006
HmPh: 555)777-1390 WrkPh: 000)000-0000      Last office visit... 8/24/2006
SC7 SUPV      Last monthly report. 8/24/2006
UA LOG      Employed? (Y/N).. Y 4/28/2006 00 %
              Next office visit... 9/07/2006 13:30

      Date      Time      Place      Person      SC MR Key word
      3/20/2007      O      X      Y N

More...
F3=Exit      F4=Prompt/PhoneHist      F5=Refresh      F7=Browse backward
F8=Browse frwd      F10=Print      F11=Menu bar      F19=Edit text      F24=More keys
  
```

**Section 4.2 - Chrono Header**

1. When the Edit Offender Data screen is displayed, it is in the **CREATE** mode and the cursor is on the chrono header "Place" field. Use <SHIFT-TAB> to move back to the date if you need to change it.

2. Using <Tab> to move between fields, type the appropriate code letter under Place and Person. [If you do not know the code, use <F4> Prompt to display the Place and Person Tables; use the <Page Down> and <DOWN-ARROW> keys to position the cursor on the place or person type you need, and press <Enter> to select it. Place field defaults to "O" and Person field defaults to "X".]

```

CMS204I      TRAINING Corrections Information Systems      10:46:42
TISIS15      Edit Offender Data      CREATE      3/20/07
              3443 LEWIS, PAM      SAN
SID#: ██████████      DOB: 9/09/1979      SSN: ██████████
Status: PostPrison      MED      ID THEFT UN USE VEH
6735 SE ALDER PLACE      Last attempted HV... 8/22/2006
MILWAUKIE, OR 97222      Last completed HV... 8/22/2006
HmPh: 555)777-1390 WrkPh: 000)000-0000      Last office visit... 8/24/2006
SC7 SUPV      Last monthly report. 8/24/2006
UA LOG      Employed? (Y/N).. N 4/28/2006 00 %
              9/07/2006 13:30

              Chrono Place/Reason Table
              Position to . . . .      ord
Date   Time   Place
3/20/2007      O      Code Description
-----
PI      Public Inquiry
S      Sanction
T      Telephone call
TX     Treatment Provider
V      interVention for Struc. Sanct.
              More...      More...

F3=Exit  F4=Prompt/Pho  F12=Cancel      rd
F8=Browse frwd  F10=P      4=More keys
    
```

3. "**SC**" means "**Significant Contact**." If in your professional judgment this a contact that meets OCMS and local standards, defaults to "Y" for "Yes." Type "N" if NOT significant.

4. "**MR**" means "**Monthly Report Accepted**." Defaults to "N" for no monthly report submitted. If you accepted a monthly report, type a "Y" here.

5. "**Key Word**" identifies the main topic of the chrono. Refer to the list of Key Words on page 6 below, use as appropriate.

```

Date   Time   Place      Person      SC MR Key word
3/20/2007      O      X      Y N
-----
More...
    
```

*If you do not use these fields - **Place**, **Person**, **SC**, and **MR**, then ISIS cannot collect and give you workload credit for your contacts and Monthly Reports received when an electronic case audit is performed. Nor will generated entries, PO Special Reports, or Chrono Search work as anticipated.*

### Section 4.3 - Text Field

				: Q DNA collection data	:
Date	Time	Place	Person	: D Descriptions	:
3/20/2007		O	X	:	More... :
_____				:.....:	
					More...
F3=Exit	F4=Prompt/PhoneHist	F5=Refresh	F7=Browse backward		
F8=Browse frwd	F10=Print	F11=Menu bar	F19=Edit text	F24=More keys	

6. Type in lower case all information relevant to the chrono. Type ALL CAPITALS for topics within the chrono, so you can easily search for them later; e.g. VEHICLE 1994 red Camero, OR# KBE007.

Date	Time	Place	Person	SC	MR	Key word
3/20/2007		O	X		Y N	
O reported in, gave a UA and advised of new address.						
_____						
More..						

### Section 4.4 - Menu Bar - Info Window <F11> <4>

7. Use the appropriate letter to access Change Address, Treatment, Conditions, Names, and/or Institution Programs, etc. Use "\*" instead of a letter, and you will automatically move through all of the choices in turn as you press <Enter>.

4	Active_Jobs	WS_Options	Process_Step	Info_Windows
				.....
		3443 LEWIS,	:	*Information Windows
SID#:	_____	:	X	Addresses
Status:	PostPrison	MED	I	: T Community Treatments
	6735 SE ALDER PLACE		L	: P Institution Program Window
	MILWAUKIE, OR 97222		L	: U Urinalysis
HmPh:	555)777-1390	WrkPh: 000)000-0000	L	: G Supervision Conditions
SC7	SUPV		L	: N Names
UA	LOG		E	: F Supervision Fees
			N	: C W/W Offenses/Court Orders

### 4.5 Chrono Entry

- Press <Enter> once to save the chrono; you will then be in the CHANGE mode to edit the chrono if necessary.
- Press <F12> Cancel, OR <Enter> again, to return to the Offender Summary or go to another pre-selected offender name. <F3> Exit will return you to the Summary screen, even if you have pre-selected other names.

### 4.6 Flashing Indicators

On the Offender Data Edit screen you may see the below flashing red indicators; SAN=sanctionable; DET=Detainer; NOT=Notifier.

## CHAPTER 5.0 ISIS Keywords List

The Field Automation User's Group, FAUG, recommends the following list of key words for use in the Keyword field of Chrono entries. The use of these words will promote consistency in and between offices, and improve the ability of users to quickly search chronos for significant information. Below are some suggested keywords.

WORD	DEFINITION
<b>Arrest</b>	All arrests of Offender by any agency.
<b>Associates</b>	All friends, family, and organizations affiliated with the offender.
<b>Audit</b>	Supervisory audit of offender file.
<b>Authorization</b>	All permissions given to the offender, including travel, visitation with victim or minors.
<b>Caution</b>	Any officer safety concern.
<b>Confidential</b>	Private information from Law Enforcement, family, informants and other sources.
<b>File Review</b>	PPO review of file, or closing summary, or transfer of offender.
<b>Map</b>	Directions to the offender's residence.
<b>Polygraph</b>	Directive and/or results of a polygraph test.
<b>Report</b>	All violations and sanctions pertaining to the offender.
<b>Search</b>	A search of the offender or property.
<b>UA</b>	Urinalysis testing.
<b>TX</b>	Treatment information for offender.

# CHAPTER 6.0

## Change Chrono History

### Section 6.1 – Go to Chrono History

1. You Must Start With **Option <2>= Change** When Selecting The Offender.

2. **<F20-Shift F8>=HISTORY** - use to go to the chrono history screen. The most recent entry will be displayed.

```

Status: PostPrison          HI          BURG II THEFT I
23901 NE HALSEY ST #40      Last attempted HV... 9/17/2004
PORTLAND, OR 97060         Last completed HV... 9/17/2004
HmPh: 503)666-9641 WrkPh: 503)381-6202 Last office visit... 7/11/2006
SC7 COFO SUPV              Last monthly report. 8/16/2005
UA LOG TREATMENT HISTORY   Employed? (Y/N).. N 7/11/2006 00 %
                             Next office visit... 8/10/2006 17:00

      Date  Time  Place          Person          SC MR Key word
3/29/2007      O              X              Y  N

More...

F12=Cancel   F13=Insert line  F14=Delete line  F16=No wrap
F20=History  F21=Notes       F22=Defaults    F24=More keys
  
```

```

CMS208I      TRAINING Corrections Information Systems      11:00:12
TISIS15      Offender Chrono History                      3/29/07
              3443 LEWIS, PAM
Offender [REDACTED] Page Roll
Control      Find

has appt for his ODL on 9/27 then will do his CDL. O will need tp for WA once
he has license for work. Can verify this through Guy. Card in file.
              MTNO LEWISP      09/18/2006
09/20/2006   Voice Mail   Offender      SC
Needs tp for Vanc. Call him at 666-9641.
              MTNO LEWISP      09/25/2006
09/21/2006   Voice Mail   Offender      SC
Left msg that I will leave a TP for him on Monday but I need more info.
              MTNO LEWISP      09/25/2006

Bottom
F4=Prompt  F5=Refresh  F10=Print  F11=Menu bar  F12=Cancel  F13=Roll change
F14=Find options  F16=Find  F20=Modify  F21=Append  F22=Delete
  
```

### Section 6.2 – Edit Chrono

1. **<F4> Prompt** - use on SID number to display Offender/Caseload Select window, to move to another offender.

2. **<F5> Refresh** - use to "erase" things you have typed, and return the screen to the way it originally was.

3. **<F10> Print** - use to print chrono history. Specify start and end dates; or use default setting to print entire history.

4. **<F11> Menu Bar** - use to move to some other part of ISIS, or access Offender Notes or ToDo List.

5. **<F13-Shift F1> Roll change** - changes the <Page Up> and <Page Down> so the chronos scroll a page at a time, or an entry at a time.

6. **<F14-Shift F2> Find Options** - displays screen where you enter chrono search criteria. "String to Find" – type the word or phrase you want to locate exactly as it would be in the chrono.

NOTE: if you type ALL CAPS just for important words, you can easily locate them by specifying...

"Kind of match"

<1> Same case – (upper or lower) as you typed in the string field; skips all other similar entries.

<2> Ignore case – locates all identical strings regardless of case.

-OR-

"Chrono date" – locate a specific chrono by date.

"Chrono place/reason" – locate all chronos relating to a specific type of place, such as H for Home.

"Chrono person" – locate all chronos relating to the specified type of person.

"Chrono key word" – locate all chronos bearing the specified key word.

-OR-

"Signature user" – locate all entries made by any, or a specified, User-ID.

"Signature date" – locate entries by date chrono actually entered into system, not the date of event.

7. **<F16-Shift F4> Find** – press to start search after setting chrono search criteria (<F14> or the "Find\_\_\_\_" field).

8. **<F20-Shift F8> Modify** – use to edit a text or narrative chrono not more than 7 days old, that you wrote.

<DOWN-ARROW> to place cursor on the header of the entry needing modification, and press <F20-Shift F8> again. The chrono will reappear on the Edit Offender Data screen, which will be in "Change" mode. Make the changes you need, and press <Enter> to save them.

9. **<F21-Shift F9> Append** - use to add information to chronos more than 7 days old; chronos you did not write; or to system data entries such as for treatment or UA's. To do, follow same steps as "Modify" above except use <F21-Shift F9> to append.

10. **<F22-Shift F10> Delete** - used to remove a chrono entry that is less than 7 days old that you wrote, from the chrono history. After 7 days, chronos cannot be deleted. You will be told on screen if you can delete this chrono. Place cursor on chrono header line of the chrono you want to delete. Press <F22-Shift F10> to display the deletion confirmation window; then press <Enter> to confirm deletion. <F12> will cancel, as will <N> <Enter>.





# CHAPTER 8.0

## Enter Treatment Updates

### 1. <F11-4-T> Community Treatments - Treatment Programs (active) displayed

```

4 Active_Jobs WS_Options Process_Step Info_Windows

                               3443 LEWIS, PAM                               SAN
SID#: ██████████ DOB: 10/02/1983 SSN: ██████████
Status: PostPrison HI BURG II UN USE VEH STOLEN VEH
3202 NE 81ST Last attempted HV... 6/28/2006
POTRLAND .....
HmPh: 50 : CMS304I Treatment Programs :
SUPV CMP : Offender: 14675260 CLARK, DANIEL L :
UA LOG : Enter Option: :
        : 2=Edit Treatment Rec 4=Delete Treatment 5=Display Treatment Pgm :
        : *ALL *ALL *ALL :
Da : Treatment Cnty Type Referred Entered Exit date Code I :
3/22/20 : CLAC-IDP/ESP CLAC SUBS 6/04/2003 7/17/2003 N :
        : CLAC-HARRISS CLAC SUBS 4/03/2003 4/07/2003 5/12/2003 SUCC N :
        : CLAC-CCMH2 CLAC MHTX 4/02/2003 6/04/2003 6/04/2003 SUCC N :
        : :
        : Bottom :
F3=Exit : F4=Prompt F6=Add F10=Print F12=Cancel :
F8=Brows : :
        :.....:

```

### 1. <F6> Add - Displays add NEW treatment program window.

```

4 Active_Jobs WS_Options Process_Step Info_Windows

                               3443 LEWIS, PAM                               SAN
SID#: ██████████ DOB: 10/02/1983 SSN: ██████████
Status: PostPrison HI BURG II UN USE VEH STOLEN VEH
3202 NE 81ST Last attempted HV... 6/28/2006
POTRLAND .....
HmPh: 50 : CMS304I Treatment Program :
SUPV CMP : Offender: 1 Add :
UA LOG : Enter Optio :
        : 2=Edit Trea Offender: 14675260 CLARK, DANIEL L ent Pgm :
        : *ALL :
Da : Treatmen Treatment ID. . Code I :
3/22/20 : CLAC-IDP Refer date Entry date Exit date/Code I SUCC N :
        : CLAC-HAR 3/22/2007 SUCC N :
        : CLAC-CCM :
        : :
        : More... Bottom :
F4=Prompt F5=Refresh F7=Dsp Treatment :
F3=Exit : F4=Prompt F12=Cancel :
F8=Brows : :

```

### 2. <F4> Prompt on Treatment ID to obtain list of available programs. Treatment Program Select Window.

- <F4> Prompt on Type; "\*ALL" for all, or select specific choice to limit search.
- <F4> Prompt on County, or set to "\*ALL" for statewide search.
- OR -

Directly type in Program ID-name if known (must exactly match name on file.)

- 2) Type actual referral date, if different from default date.
- 3) Type "Y" if the offender is indigent; leave blank if not indigent.
- 4) <Enter> to save information.

<DOWN-ARROW> <2=Edit Treatment, Enter> - to select a current ACTIVE program for updating.

1) Type actual date of entry into treatment; and/or...

2) Type actual date exited from treatment.

<F4> PROMPT on Exit Code to obtain table of codes.

<Enter> once to save data; <Enter> or <F12> to return to Menu Bar.

3. **<F10> Print** - use to obtain a printout of treatment information.

# CHAPTER 9.0

## Enter UA Tests

### 1. <F11-4-U> - SUBSTANCE ABUSE TESTING - displays Substance Abuse Log (test history)

```

4 Active_Jobs WS_Options Process_Step Info_Windows
-----
SID#: ██████████ 3443 LEWIS, PAM SAN
Status: PostPrison HI DOB: 10/02/1983 SSN: ██████████
3202 NE 81ST BURG II UN USE VEH STOLEN VEH
Last attempted HV... 6/28/2006
POTRLAND, .....
HmPh: 503 : Urinalysis Log :
SUPV CMPF : Offender: 14675260 CLARK, DANIEL L :
UA LOG A : A B B C M O P T X :
: L A E O E P C H N :
: Sample Result C R N C T I P C O Audt :
Dat : date date O B Z A H A S Loca :
3/22/200 : 1/12/2006 1/17/2006 - - - - - OSP :
: 4/14/2004 4/20/2004 - + - - - CLAC :
: 4/07/2004 4/09/2004 - - - - - CLAC :
: 3/03/2004 3/05/2004 - - - - - CLAC :
: More... :
F3=Exit : F6=Add F10=Print F12=Cancel :
F8=Browse : :

```

**1. <F6> Add** - Displays add NEW substance abuse test window. For Community Corrections, it will default to REASON as "COND" meaning the sample is being taken as a condition of supervision. Type <F4> here for a list of other REASON codes. Also for Community Corrections, it will default to TYPE as "UA". Type <F4> here for a list of other available TYPE codes. The sample date defaults to today's date. Type correct sample date, if default is not correct. <Tab> to and type result date, if the results are known. This information may be entered later. When the results for the tested drugs are entered, the system will automatically enter the entry date as the Result Date. <Tab> and enter Creatinine level, if known once the results have been received. <Tab> and enter first and last name of person obtaining the sample. (For chain of evidence.) <Tab> to drugs listed. Type <1> for tested, <2> for tested positive, <3> tested negative, <4> for tested abnormal. <Tab> to comment line at right; use to enter BAC %, if available. <Enter> once to save test information. <Enter> again or <F12> Cancel to return to Menu Bar.

```

4 Active_Jobs WS_Options Process_Step Info_Windows
-----
SID#: ██████████ 3443 LEWIS, PAM SAN
Status: PostPr .....
3202 NE 81ST : Urinalysis :
POTRLAND, .... : Create :
HmPh: 503 : : Offender: 14675260 CLARK, DANIEL L :
SUPV CMPF : Of : Sample date... 3/22/2007 Result date... :
UA LOG A : : Taken by first profile last... training :
: : 1=Select 2=Positive 3=Negative 5=Abnormal :
: : Code Condition R Comment :
Dat : : ALCO Alcohol :
3/22/200 : : BARB Barbiturates :
: : BENZ Benzodiazopine :
: : COCA Cocaine :
: : METH Meth :
: : OPIA Opiates :
: : PCP PCP :
: : THC THC :
: More... :
F3=Exit : F6 : F5=Refresh F12=Cancel :
F8=Browse : :

```

For Results, or viewing, a prior test <DOWN-ARROW> to desired test, press <Enter> to select, view, and enter results as above. <Enter> once to save new information, or <F12> Cancel, and return to Menu Bar.

2. **<F10> Print** to obtain a printout of UA test history.

# CHAPTER 10.0

## Enter Aliases, Monikers or View Institution Programs

### 1. <F11-4-N> - NAMES - displays Offender Names window

```

4 Active_Jobs  WS_Options  Process_Step  Info_Windows
                               3443 LEWIS, PAM           SAN
SID#: ██████████          DOB: 10/02/1983  SSN: ██████████
Status: PostPrison          HI          BURG II UN USE VEH STOLEN VEH
3202 NE 81ST                Last attempted HV... 6/28/2006
POTRLAND, OR 97213         Last completed HV... 6/28/2006
HmPh: 503)255-3410 WrkPh: 000)000-0000 Last office visit... 9/25/2006
SUPV CMPF                  Last monthly report. 9/25/2006

                               : Offender SID 14675260           :
Date Time Place           : Name                               Type           :
3/27/2007      O         : CLARK, DANIEL L                    COURT          :
_____         : CLARK, DANIEL LEWIS                ALIAS COURT    :
_____         : CLARK, DANNY LEWIS                 ALIAS          :
Bottom : F3=Exit  F4=Prompt/PhoneHist : F6=Add  F10=Print  F12=Cancel      :
F8=Browse frwd  F10=Print  : Position cursor, press enter for change. :

```

1. <F6> Add - displays Offender Name window in "Add" Mode
  - Type new name, using <Tab> to move from name field to name field.
  - Type code letter for type of name. Or, use <F4> to display code table.
  - Type the offender's title, if appropriate; e.g. Jr., Dr., etc.
  - <Enter> once to save new name. <Enter> or <F12> Cancel to return to Menu Bar.
  
2. <F10> Print - to obtain a printout of all the offender's names.
  - <Enter> or <F12> - return to the Menu Bar.

```

4 Active_Jobs  WS_Options  Process_Step  Info_Windows
POTRLAND, OR 97213         Last completed HV... 6/28/2006
HmPh: 503)255-3410 WrkPh: 000)000-0000 Last office visit... 9/25/2006
SUPV CMPF                  Last monthly report. 9/25/2006
UA LOG ASSIGNED TO TREATMEN
Date Time Place           : Offender Name                               Add           :
3/27/2007      O         :                               Add           :
_____         : Court Name: ██████████                      :
_____         : Last name . .                               :
_____         : First name . .                              :
_____         : Middle name .                               :
_____         : Name type . .                               Title . . . . :
_____         :                               :
F3=Exit  F4=Prompt/Phon : F5=Refresh  F12=Cancel      :
F8=Browse frwd  F10=Pr  :                               + :

```

**2. <F11-4-P> - INSTITUTION PROGRAMS - displays current custody program involvement.**

```

4 Active_Jobs  WS_Options  Process_Step  Info_Windows
                               3443 LEWIS, PAM          SAN
SID#: ██████████          DOB: 10/02/1983  SSN: ██████████
Status: PostPrison          HI          BURG II UN USE VEH STOLEN VEH
3202 NE 81ST                Last attempted HV... 6/28/2006
POTRLAND, OR 97213         Last completed HV... 6/28/2006
HmPh: 503)255-3410 WrkPh: 000)000-0000  Last office visit... 9/25/2006
SUPV CMPF                  Last monthly report. 9/25/2006

:                               Institution Programs                               :
: Offender: 14675260 CLARK, DANIEL L                                           :
:                               *ALL *ALL *ALL                                   *ALL :
: Program Section  Loc  Catg Type  Referred  Entered  Exit Date Code :
: CTS M/H RISK ED M  CRCI MH  MENT  8/25/2006  8/25/2006  8/28/2006 SUCC :
: WFDPREP TH 1      CRCI EDUC SKIL  7/12/2006  7/12/2006  8/31/2006 POST :
: INST-COG LEADERSHIP CRCI INST INST  6/20/2006  6/20/2006  8/31/2006 POST :
:                                                                                   More... :
: F10=Print  F12=Cancel  F16=View all                               :

```

**1. <F16-Shift F4> View History - "toggles" between current custody and program history.**

**2. <F10> Print - to print a printout of program activity, current custody or history.**

<Tab> within the Institution Program window to the "\*ALL" fields for program location, Category, Type, or Exit code. Use <F4> Prompt to display selection window to restrict display to a specific program location, category, type, or exit code. Use <DOWN-ARROW> and/or <Tab> to position the cursor on the code you want and press <Enter> to select it. Press <Enter> again to display any program(s) meeting the criteria you set.

Location: alphabetical listing of all county corrections offices; institutions; and other DOC units.

Category: types of Institution programs, including club, education, job, treatment, vocational, and work release programs.

Type: lists all treatment types, including anger management, Breaking Barriers, intensive supervision, mental health, substance abuse evaluation and treatment, sex offender evaluation and treatment, work crew, and work release.

Exit Code: lists reasons for exiting a program, including absconded, administrative removal, denial, dropped, duplicate assignment, entry error, failure, job change, no show, old OPS, refused, or rejected at intake.

Use <Page Up>, <Page Down>, <Tab>, and/or "Position to" to move within these windows.

<Enter> or <F12> Cancel - return to the Menu Bar.

# CHAPTER 11.0

## Track Supervision Conditions

**1. <F11-4-G> - SUPERVISION CONDITIONS** - displays condition of probation, parole, and post-prison supervision.

```

4 Active_Jobs WS_Options Process_Step Info_Windows
-----
SID#: ██████████ 3443 LEWIS, PAM SAN
Status: PostPrison HI BURG II UN USE VEH STOLEN VEH
3202 NE 81ST Last attempted HV... 6/28/2006
POTRLAND, OR 97213 Last completed HV... 6/28/2006
HmPh: 503)255-3410 WrkPh: 000)000-0000 Last office visit... 9/25/2006
SUPV CMPF Last monthly report. 9/25/2006
UA LOG ASSIGNED TO TREATMENT Employed? (Y/N).. N 8/31/2006 00 %
.....
: CMS306I Conditions :
: Offender: 14675260 CLARK, DANIEL L :
: Court case Cond Unit Amount Monthly Balance Lst Payment Cmpl :
- : 050230598/01 SUPV 35.00 35.00 :
- : 041035570/01 CMPF .00 :
- : 030536/01 SC10 .00 :
- : 030536/01 SC11 .00 :
- : 030536/01 SC9 .00 :
- : 031065/01 SC10 .00 :
: More... :
F : F10=Print F12=Cancel F18=Expired Conditions :
F : :
:.....

```

1. Conditions window displays, with...
  - a. Parole conditions displayed first, followed by probation conditions.
  - b. Trackable conditions are highlighted at the top of each section.

**2. Working with or viewing a specific condition –**

```

4 Active_Jobs
-----
CMS307I Condition Change SAN
SID#: ██████████ Offender: ██████████ SSN: ██████████
Status: PostPri Custody/admission. 01 05 TOLEN VEH
3202 NE 81ST Case number. . . . 050230598/01 6/28/2006
POTRLAND, OR 97 Condition code . . SUPV 6/28/2006
HmPh: 503)255-3 Condition units. . 9/25/2006
SUPV CMPF Condition text . . 8/31/2006 00 %
UA LOG ASSIGNE
.....
: CMS306I Condition amount . :
: Offender: 1 Monthly amount . . 35.00 :
: Court cas Start date . . . . 6/03/2005 Lst Payment Cmpl :
- : 050230598 Last pay activity. :
- : 041035570 Balance. . . . . . .00 :
- : 030536/01 Amount this month. :
- : 030536/01 Completed date . . :
- : 030536/01 Expiration date. . 8/30/2007 :
- : 031065/01 Trackable. . . . . Y :
: More... :
F : F10=Print F5=Refresh F12=Cancel :
F : :
:.....

```

- a. Use <Page Up> and <Page Down>, then <DOWN-ARROW> to place cursor on the condition you want to select, and press <Enter>. This will display the Update conditions window.
- b. To enter Balances and Amounts, type in the amount, press <Enter> to save.

c. To add or remove a condition from tracking, <Tab> to the Trackable field and type <Y> for yes - make trackable, or type <N> for no - not trackable. Press <Enter> to save. <F12> Cancel to return to condition window. Press <F5> Refresh to display the new trackable condition(s).

**NOTE:** Making a condition trackable will display the condition code on the Edit Offender screen below the phone numbers as a reminder to you. It will also make it possible for ISIS to remind you what conditions have or have not been satisfied at expiration of supervision; and who may need a service like a UA.

**Section 11.1 OPS Special Condition Codes:**

ADCO-Alcohol/Drug Eval/Counsel	DLSP-Drivers License Sups/Revk
AEVF-Alcohol Evaluation Fee	DMVF-DMV/Intoxicated Driver
ANGR-Anger Control Counseling	DVFE-Domestic Viol Assess Fee
ANTA-Antabuse	DVTX-Domestic Viol Eval/Tx
APOL-Apology to victim	ELHA-Elec Mon/House Arrest
ATFE-Attorney Fees	EMPL-Employment and/or School
BODY-Body Substance Testing	FGWP-Forfeit Gun/Weapon
BREA-Breathalyzer	FINE-Fine
CGED-Complete GED	FORE-Forest Project
CMPF-Compensatory Fine	JAIL-Jail
COFO-Court Ordered Finan Oblig	JLFE-Jail Fees
CONC-Other Counseling	LEML-Law Enforcement Fee
CSFE-Community Service Fees	MHTX-Mental Health Eval/Tx
CSWK-Community Service Work	MSDR-Misdmr Tx Sucfl Comp Prob
CURF-Curfew	NAAA-Narco or Alco Anony
CVTX-Criminal Viol Eval/Tx	NABS-Not Freq Adult Book Store
DFRE-Drug Free Zone Exclusion	NALC-No Alcohol
DGCT-Drug Court	NALE-No Alcohol to Excess
NAME-State True Name	PRG1-Program
NASN-No Association	PRG2-Program
NCMF-No Contact Minor Females	PRG3-Program
NCMM-No Contact Minor Males	PRNT-Parenting Class
NCMN-No Contact Minor	REST-Restitution
NCVI-No Contact w/Victim	RGSX-Register As Sex Offender
NDRG-No Drugs/Paraphernalia	SC1-Submit to Mental Health Eval
NGAM-No Gambling	SC2-Psych med Monitoring
NOAC-No Assoc. w/Known Criminal	SC3-No Cont w/Minor Female
NOAD-No Assoc w/Drug Users	SC4-No Contact w/Minor Males
NOCD-No Contact w/Co-Defendant	SC5-S/O Polygraph Test
NOCV-No Offensive Contact Victim	SC6- Sex Offender Tx Program
NOEA-No Entry where Alcohol Sold	SC7-Court Ordered Restitution
NOEC-No Entry Children Congregate	SC8-Sex Offender Notification
NOED-No Entry Drugs Kept/Sold	SC9-No Intoxicating Beverages
NOGA-No Association Gang Members	SC10-Other Conditions Listed
NOLI-No Driv w/o License/Ins	SC11-No Contact w/Listed People
NOMC-No Medical Marijuana Card	SC12-Search PC/Electronic EQUIP
NONT-No Internet	SC13-

NOWP-No Weapons Possession	NOSC-No Scanners
NSXP-Not Use/Poss Sex Paraph	SRCH-Search Clause
NUSA-Not Re-Enter USA Illegally	SUPV-Supervision Fees
OLDT-Not Allowed in OldtownPortland	SXTR-S/O Treatment
OTHE-Other Conditions	THTK-Theft/Property Class
OTHR-Other	TRES-No Trespass
OTH1-Other Condition	UNAS-Unitary Assess Fee
OTH2-Other Condition	URIN-Urinalysis
OTH3-Other Condition	VICP-Victim's Panel
OTH4-Other Condition	VICT-Victim Penalty Assessment
PENT-Penitentiary/Jail Tour	VLSP-Vehicle License Susp/Revoke
PLET-Plethysmograph	WKCR-Work Crew
POLY-Polygraph	WKRE-Work Release

**Section 11.2 OPS General Condition Codes:**

GC01-Pay Court Ordered Fees, Fines	GC09-Consent to Search by PO
GC02-No Use Possess Cont Subs	GC10-Obey all laws
GC03-Submit to breath/urine test	GC11-Answer all questions truthfully
GC04-Participate Sub Abuse Eval	GC12-No weapon possession
GC05-Remain in Oregon	GC13-Report/Abide by Direction PO
GC06-Find/Maint gainful employment	GC14-Sex Offender Tx/Poly
GC07-No change employment/address	GC15-Mental Health Eval
GC08-Submit to Supervision and Visits	GC16-Sex Off Report Instructions

**Section 11.3 OPS T/L Condition Codes:**

TL01-Inmate Expense	TS01-Structured Sanction Process
TL02-Daily PO Contacts until Empld	TS02-No alcohol or intox substance
TL03-Acceptable Community Behavior	TS03-Abide curfew imposed by PO
TL04-Comply with Aftercare Plan	TS04-Geographical restrictions
TL05-Comply with Relapse Prevention	TS05-Alcohol/Drug Supprt Mtgs/TX
TL06-Search Computer/Equipment	TS06-Community Mtgs on a Schedule
TL07-Attend Cognitive Programming	
TL08-Polygraph Testing	
TL09-Other	

# CHAPTER 12.0

## Accessing W/W Treatment and selecting and viewing program information and to monitor treatment status:

### Section 12.1

```

CCPPO                Corrections Information Systems                10:59:27
MCCARTHY            ISIS PPO Main Menu                            3/13/07
Select one of the following:
  1. W/W To-Do List
  2. W/W Caseloads
  3. W/W Treatment Programs
  4. Offender Information Screen
  5. Fee Balances by Caseload
  6. W/W Supervision Fees
  7. W/W Structured Sanctions
  8. W/W Risk Assessments
  9. W/W STATIC-99 Assessment
 10. W/W Sex Offender Assessment
 11. W/W Court Orders
 13. W/W Warrant Request (Offender)
 14. W/W Warrant Records (by PO)
                                     More...

Selection: 3
F3=Exit   F4=Prompt   F10=Move to top   Job:
F11=Menu bar   F12=Previous menu
  
```

1. From ISIS PPO Main Menu, type <3> to select the W/W Treatment option, then press <Enter> to display the statewide directory of programs.

```

CMS102I            Corrections Information Systems                11:31:59
MCCARTHY            Work with Community Treatment Programs        3/13/07
                                     Position to . . . . .MULT-ASAP
Enter option...
  2=Change   3=Copy   5=Display   12=Work with assignments

Opt Program      Type Name                                     Phone Number  Sx Rs In Wt
A/D PROGRAM     SUBS WOMEN'S MISSION                          541-882-4895  A Y Y N
BAKR-BKRHOUS    SUBS NEW DIRECTIONS NORTHWEST                541-523-6581  A Y Y Y
BAKR-BLU ANG    ANGR BLUE MOUNTAIN ADDICTIONS                541-523-8364  A N Y N
BAKR-BLU DV     DV BLUE MOUNTAIN ADDICTIONS                  541-523-8364  M N N N
BAKR-BLUE MT    EDUC BLUE MT COMMUNITY COLLEGE              541-523-9127  A N Y N
BAKR-BLUMTAD    SUBS BLUE MT. ADDICTIONS PROGRAM             541-523-8364  A N Y Y
BAKR-CHOICES    SXTX CHOICES                                  541-568-4893  A N N N
BAKR-COMMUNI    EDUC COMMUNICATION SKILLS                    541-523-8217  A N Y N
BAKR-CSWPRG     SUBS BAKER CO WORK CREW                      503-523-8217  A N Y N
BAKR-DEVWORK    EDUC STEP FORWARD                            541-523-7475  A N Y N
BAKR-ESP        TRPG BAKER ELECTRONIC SURVEILLANCE           541-523-8217  A N Y N
BAKR-L&L        PRNT LOVE AND LOGIC                          541-523-8364  A N Y Y
                                     More...

F3=Exit   F5=Refresh   F6=Create   F10=Print   F11=Menu bar
F12=Cancel F13=Repeat   F17=Subset
  
```

2. If you know the name of the program you want, type the name on the "Position to" line and press <Enter> to move directly to that program.
  - a. Use Option <5> **Display** to view information about the program.
  - b. Use Option <12> **Work with Assignments** to see which offenders are, or have been, in the program.

```

CMS102I                Corrections Information Systems                11:37:45
MCCARTHY                Work with Community Treatment Programs        3/13/07

                                Position to . . . . .
Enter option...
  2=Change   3=Copy   5=Display   12=Work with assignments

Opt Program      Type Name                                Phone Number Sx Rs In Wt
  5  MULT-ASAP    SUBS ASAP TREATMENT SERVICES, INC    503-224-0075  A  N  N  Y
    MULT-ASAPANG ANGR ASAP TREATMENT SVCS-ANGER MGMT 503-239-8400  A  N  N  N
    MULT-ASAPDV  DV  ASAP TREATMENT SERVICES, INC    503-224-0075  A  N  N  N
    MULT-ASHBY   SUBS JUDITH ASHBY,LCSW                503-819-1500  A  N  Y  Y
    MULT-ATS     SUBS ADDICTION TX. SERVICES          A  N  Y  Y
    MULT-BAKERDE SXTX DEBORAH BAKER                    503-221-1831  F  N  N  N
  12 MULT-BETPEOP COGN BETTER PEOPLE      503-281-2663  A  N  Y  N
    MULT-BLAKE   SUBS BLAKE FISCHER-DAVIDSON          503-224-3994  A  N  Y  Y
    MULT-BLAKE2  SXTX BLAKE FISCHER                    503-224-3994  A  N  N  N
    MULT-BRIDGE  MHTX BRIDGEVIEW - MENTAL HLTH WEST  503-222-3215  A  Y  Y  Y
    MULT-BRKTHRU SUBS MORRISON CENTER BREAKTHROUGH    503-231-4000  A  Y  Y  N
    MULT-BROWN   SXTX GUIDE SVC FOR PERSONAL CHANGE  503-236-5003  A  N  N  N
                                                More...

F3=Exit      F5=Refresh  F6=Create   F10=Print   F11=Menu bar
F12=Cancel   F13=Repeat  F17=Subset

```

**Option 5 Example:**

```

CMS103I                Corrections Information Systems                11:44:59
MCCARTHY                Community Treatment Program        3/13/07

                                DISPLAY
Program ID..... MULT-ASAP

Program type..... SUBS Substance Abuse Treatment
Program name..... ASAP TREATMENT SERVICES, INC
Contact name..... SAM SWAIM, DIRECTOR
Phone number..... 503-224-0075
Site address..... 2130 SW 5TH - SUITE 100
City State Zip.... PORTLAND                OR 972010000
Service area..... MULT Multnomah
Comments..... OUTPATIENT; DUII LEVEL II; ODL; TITLE XIX; ANGER
                MGMT; FREE CHILD CARE
Takes indigent Y/N.. N      Sexes treated..... A
Waiting list..... Y      Date available.....
Residential program.. N      Ave program length.. 6 M Months

Program expired.....      Program Assess (EBP):
                        Program Asses Date..:

F3=Exit      F5=Refresh  F7=Browse backward  F8=Browse forward
F11=Menu bar  F12=Cancel

```

## Option 12 Example:

```

CMS130I                Corrections Information Systems                11:49:31
MCCARTHY                Work with Treatment Program Assignments        3/13/07

Treatment program . . MULT-BETPEOP

Enter option...
  2=Change   5=Display                                           (Active)

Op Offender Name      SID No  Loc  Referred  Entered  Exit Date  Code
DEBRUHL, RYAN        12392545 MTDV  3/09/2007
HUBBARD, PHILLIP    13217596 MTDV  2/07/2007
CLARK, DANIELE N    14274117 CLAC  12/04/2006 12/04/2006
ALSDORF, STEVEN LYNN 6254688 CLAC  11/22/2006 1/17/2007
RICHARDSON, LARRY CLEM 15121763 MTSX  8/21/2006
BATES, KARL RAY      4973832 MTSX  5/15/2006  6/05/2006
DAVIS, TANUIA EVETA  7897593 MTEA  9/01/2005
RHODES, DEWITT      13423657 WASH  1/27/2005  1/27/2005
HINES-NORWOOD, RICHARD 10689716 MTCB  11/10/2004
ROBERTSON, DENISE   12989523 CCCF  10/12/2004 10/18/2004
LEKBERG, ERIC RAY   11870459 MTCB  9/30/2004 10/05/2004

More...
F3=Exit      F4=Prompt    F5=Refresh      F10=Print      F11=Menu bar
F12=Cancel   F13=Repeat   F15=Reverse order  F17=Subset

```

3. If "shopping around" for a program, use **<F17-Shift F5> Subset** to locate programs by specifying details like type of program and/or service area required. Follow the examples on screen, and press **<Enter>** to display any program(s) which meet your criteria.

4. To reverse the order of the display use **<F15-Shift F3>**.

```

CMS102I                Corrections Information Systems                11:51:50
MCCARTHY                Community Treatment Program Subset Selection        3/13/07

Type choices, press Enter.

Program type . . . . . *ALL          *ALL, type
Service area . . . . . *ALL          *ALL, code
Take indigent . . . . . *ALL          *ALL, *YES, *NO
Sexes treated . . . . . *ALL          *ALL, M, F
Residential program . . *ALL          *ALL, *YES, *NO
Waiting list . . . . . *ALL          *ALL, *YES, *NO
Available date. . . . . 99/99/9999  Latest to include
Program status. . . . . *CUR          *ALL, *CUR, *EXP

F12=Cancel                                F4=Prompt    F5=Refresh

```

## Section 12.2 COMMUNITY TREATMENT PROGRAM SUBSET SELECTION CRITERIA

- Program Type: Defaults to \*ALL=displays all types – F4 prompt to display type list
- Service Area: Defaults to \*ALL – type in desired county code or F4 prompt to display county code list
- Take Indigent: Defaults to \*ALL - \*YES=programs that accept Indigent clients; \*NO= programs that do not accept indigent clients
- Sexes Treated: Defaults to \*ALL=both sexes; \*M=only male clients; \*F=only female clients
- Residential Program: Defaults to \*ALL=both types; \*YES=only inpatient tx; \*NO=only outpatient tx
- Waiting List: Defaults to \*ALL=either; \*YES= by appt only, no walk-ins; \*NO=walk-ins accepted
- Available Date: Defaults to 99/99/9999 - Enter date that tx is needed, will show only programs available on that date. Will not include programs that will become available after date entered.
- Program status: Defaults to \*CUR=current available programs; \*ALL=all programs; \*EXP=expired programs

## Section 12.3 COUNTY/PLACE CODES

In addition to all regular county and state codes (Baker is BAKR), there are also the following special codes:

DOC - Boarders  
PSRB-Psych Review Board

### 4. Viewing and tracking treatment program referrals

a. Use Option <5> **Display** to view (only) the treatment history of an individual offender.

```

CMS130I      TRAINING Corrections Information Systems      10:29:16
TISIS15      Work with Treatment Program Assignments      3/16/07

Treatment program . . MULT-ASAP

Enter option...
  2=Change
                                (Active)
                                Treatment Program
Op Offender                    Display      Exit Date   Code
5  DAVIS, ST
   ATKINS, E  Offender: 09882431 DAVIS, STEVEN PAUL
   HINKLE, P
   ROANE, DA  Treatment ID. . MULT-ASAP                    03
   WHITE, DA                                     02
   ADAMS, FR  Refer date Entry date  Exit date/Code I
   LEWIS, PA  5/02/2006                N      01
   PEARSON,
   ANDERSON,

                                More...
                                F7=Display Treatment  F12=Cancel
                                Bottom
F3=Exit
F12=Cancel
  
```

b. Use <F17-Shift F5> **Treatment Assignment Subset** to identify ALL OFFENDERS in the system that are:

- 1) Active (either referred to and/or entered into) the program
- 2) Referred only
- 3) Entered only
- 4) History (who has exited the program) (REQUIRED criteria for Exit Code or Exit Date)
  - a) Exit Code (Use <F4> **Prompt** to locate and select); AND/OR
  - b) Exit Date - Enter start /end dates to limit time period, or use default for all dates.

```

CMS130I      TRAINING Corrections Information Systems      10:32:28
TISIS15      Treatment Assignment Subset Selection        3/16/07

Type choices, press Enter.
Select status . . . . . A          A,R,E,H,N (see Note)
Exit code . . . . .                *ALL, code (history only)
Exit date . . . . .                mmdccyy (history only)
                                thru
                                mmdccyy
Location code . . . . . *ALL       *ALL, code
Location type . . . . . C          C=Current, E=Entered or referred
Note: A=Active (entered or referred)
      R=Referred only
      E=Entered only
      H=History (exited)
      N=Name (alpha order of all offenders, active and exited)
F4=Prompt      F5=Refresh
F12=Cancel
  
```

**Section 12.4**

<b>TREATMENT TYPES</b>	<b>COMPLETION CODES</b>
ANGR- Anger Management	SUCC-Successful Completion
COGN-Cognitive Restructuring	UNSU-Unsuccessful Termination
DV-Domestic Violence	ADMN-Administrative Closure
EDUC-Education Pgms/Classes	
JOBS-Job/Employment Related Prog's	
MHTX-Mental Health Treatment	
PRNT – Parenting Skills	
SPGP- Support Group	
SUBS-Substance Abuse Treatment	
SXTX-Sex Offender Treatment	
TRPG – Transitional Programs	

## CHAPTER 13.0

### To Access Another Officer's Caseload Within Your Own Office

From the offender summary screen -

1. <F12> Cancel to "back up" one screen to the "Select Offender to Work With" screen. Type the caseload number you want on the caseload line, and press <Enter>.

```
CMS200I      TRAINING Corrections Information Systems      10:38:28
TISIS15      Select Offender(s) to Work With              3/30/07
Type choices, press Enter.
Caseload number . . . . . 3443      LEWIS, PAM                      F4 for list
Name (LAST FIRSTM). . . . *ALL          *ALL, partial*, F4 for list

F3=Exit   F4=Prompt   F5=Refresh   F6=Use as default caseload
F11=Menu bar   F12=Cancel
```

OR...

2. With the cursor on the caseload number line, **press <F4> Prompt** to display the "Caseload Select" window.
  - a. The names of officers belonging to your unit are displayed first by default. Type the last name of the officer on the first, longer, filed and press <Enter> to locate their name. Place the cursor on their name and press <Enter> to select their caseload.
  - b. <Tab> to the second field, and type in a specific county, institution, or division code, and press <Enter>. A list of all officers at that location will be displayed. <Page Up> or <Page Down>, or Position to the officer/caseload you want, place the cursor on it, and press <Enter>. OR...
  - c. If you enter an institution caseload number, you will view CMI information.
3. <Tab> until the cursor is on the caseload number at the top of the screen.
  - a. Type in the caseload you want to move to, and press <Enter>. OR...
  - b. Press <F4> Prompt to display the "Caseload Select" window. Follow 2a and 2b above.

```
CMS200I      TRAINING Corrections Information Systems      10:38:28
TISIS15      Select Offender(s) to Work With              3/30/07
Type choices, press Enter.
Caseload number . . . . . 3443      LEWIS, PAM                      F4 for list
Name (LAST FIRSTM). . . . *ALL          *ALL, partial*, F4 for list

                                Caseload Select
                                Position to caseload . . *ALL
                                Description          Caseload  Loca
                                DISCONTINUED          3484    MTNO
                                MCCARVILLE, FLEMING    3486    MTNO
                                DISCONTINUED          3488    MTNO
                                HAWN, HEIDI            3490    MTNO
                                DISCONTINUED          3491    MTNO
                                ALTMAN, ANDREW        3492    MTNO
                                More...
                                F4=Prompt  F12=Cancel  F15=Descript sort

F3=Exit   F4=Prompt   F5=Re
F11=Menu bar   F12=Cancel
```

**NOTE:** Once changed to a different caseload number, you may use <F6> Use as default caseload to cause ISIS to always display the new caseload number, not the old one. A team member might change their individual caseload number to the team number.

# CHAPTER 14.0

## To Add or Remove “Secondary” Offender’s From A Caseload:

### Section 14.1

**Primary** refers to those offenders you actually supervise; they were assigned to your caseload through OPS and are indicated with a ‘P’ on the Work with Offender’s Summary screen.

**Secondary** refers to offenders who are actually assigned to someone else (the primary caseload) but you have temporarily added their name to your caseload for a release or transfer investigation, team supervision, or to monitor while they complete a supervision condition like community service and are indicated with a ‘S’ on the Work with Offender’s Summary screen.

If an offender is a *secondary* member of your caseload, ISIS will also display this information along with the abbreviation of the branch office or institution that actually “owns” the offender immediately under the employment and next office appointment fields.

### Section 14.2 - To add a *secondary* offender to your caseload:

```
CMS203I      TRAINING Corrections Information Systems      10:46:39
TISIS15      Work with Offenders Summary                  3/30/07

Caseload number . . . 3443 LEWIS, PAM
                               Position to . . .
Enter option...
  2=Change  4=Remove from caseload  :      Add offender to Caseload  :
  8=History 9=UA log  12=Condition  : 3443 LEWIS, PAM          :
pt Offender Name      SID#      :      :
  ██████████          : Offender: 3933009      :
:                               Offender Name Search      :
: Position to . . .      Loc: *ALL      :
: Name      Birthdate  SID# Case Loc Status/Cell      :
: ZIRKLE-ROBERTSON, DENISE R A 10/16/1983 12989523 15704 CCCF Inmate(K145B ) :
: ZIRKLE-ROBERTSON, DENISE R A 10/16/1983 12989523 15704 CCCF Inmate(K145B ) :
: ZOLL, BRUCE MICHAEL      C 06/01/1955 14280358 6566 LANE Probation      :
: ZOOK, SHANNON MARIE      C 02/19/1981 13293946 1525 DESC Probation      :
: ZUBIRIA, BECKI JO        A 05/10/1969 12561835 15705 CCCF Inmate(E1-05B) :
: ZUCKSWERT, MICKI JO      A 12/21/1956 16107994 6503 LANE Probation      :
:                               More...      :
: F4=Prompt  F12=Cancel  F16=View description      :
```

1. **<F6> Add Offender** - displays the Add Offender window. Enter SID# on Offender field if known.
2. **<F4> Prompt** on the Offender Name field to display the Name Search window, which defaults to \*ALL names, a state-wide listing including all field offices, institutions, Compact, and DOC agencies dealing with offenders.
3. Specify and Select Offender:
  - a. **Statewide** name search - type name as follows: LASTNAME FIRSTNAME, press <Enter> to position the list on or close to the offender name you want. Place the cursor on the name you want and press <Enter> to select.
  - b. **Local** name search - Type the offenders name as follows: LASTNAME FIRSTNAME, Then <Tab> to the Location field, and <F4> Prompt to select the needed agency, OR just type the desired agency code; e.g. UMAP; OSP, CCOM, etc. on the field. (This limits the search to names at this location.) Press <Enter> to run search. Place the cursor on the name you want and press <Enter> to select.

**Section 14.3 - To remove a *secondary* offender from your caseload:**

```

CMS203I      TRAINING Corrections Information Systems      10:56:36
TISIS15      Work with Offenders Summary                  3/30/07

Caseload number . . . 3443 LEWIS, PAM
                               Position to . . .
Enter option...
  2=Change   4=Remove from caseload   5=Display   6=Print chrono   7=DNA req.
  8=History  9=UA log   12=Condition tracking   13=Treatment programs
Opt Offender Name      SID#   Expir Date Cls   Reass Due Status P/S DNA
MAXWELL, LAVONNE JERROD 12823746 7/02/2009 MED 1/03/2007 PO   P
MINTHORN, JOHN WILSON  15039856 6/20/2009 MED 12/22/2006 PO   P
WILSON, DARRIN         14711605 7/20/2008 MED 1/21/2007 PO   P
 4 WILSON, JOHN DAVID   3933009 7/19/2013 2/11/2007 IN   S
WINTERS, DANIEL       15526571 7/13/2008 MED 1/14/2007 PO   P

                               Bottom
F3=Exit   F4=Prompt   F5=Refresh   F6=Add offender   F10=Print   F11=Menu bar
F12=Cancel F13=Repeat   F17=Subset   F19=Summary      F23=More options
  
```

1. Use Option <4> **Remove from caseload** on the Offender Summary screen. Press <Enter> to start removal; on the Confirm Removal screen press <Enter> again.
2. NOTE: You cannot remove an offender from your caseload if they are actually assigned to you in OPS as a primary member of your caseload.! You may *want* to, but that's cheating! And besides, it's against the rules!

**Section 14.4 - to identify the *primary* and *secondary* caseloads an offender may be part of:**

1. <F17-Shift F5> **Subset** - from Offender Summary screen. <Shift><Tab> or <Tab> to the last field, Case assignment.
  - a. <\*ALL> displays your total caseload, primary and secondary.
  - b. <P> Primary will display only your primary caseload.
  - c. <S> Secondary will display only your secondary caseload.

```

CMS203I      Corrections Information Systems      11:56:14
MCCARTHY      Offender Subset Selection          4/19/07
Type choices, press Enter.
Name (LAST FIRSTM) . . . *ALL          *ALL, name, partial*
Status . . . . . *ALL          *ALL, status (PA, PR, IN)
Include outcounts . . . *NONE        *NONE, *ALL, *ONLY, code
Risk assessment . . . . *ALL          *ALL, *NEW, *UNA, HI, MED
Risk assessment due . . 99/99/9999   Due by date
Expiration date . . . . 99/99/9999   As of date

Home/Off contact/date . *ALL 99/99/9999 *ALL, type / As of date
Last monthly report . . 99/99/9999   As of date

Special condition . . . *ALL          *ALL, code
Treatment type/program. *ALL *ALL      *ALL, name

Address city. . . . . *ALL          *ALL, name
Address state/zip/zone. *ALL *ALL *ALL *ALL, state / zip / zone

Case assignment . . . . *ALL          *ALL, P=Primary,
                               S=Secondary

F4=Prompt   F5=Refresh   F12=Cancel
  
```

**2. Option <21> Caseloads** - use on individual offenders to display the All Caseloads window. The *primary* caseload officer's name, caseload number, and Location will be highlighted; all *secondary* caseloads will also be displayed but not highlighted.

```

CMS203I      TRAINING Corrections Information Systems      11:08:11
TISIS15      Work with Offenders Summary                  3/30/07

Caseload number . . . 3443 LEWIS, PAM
                               Position to . . .

Enter option...
  14=Names  15=Address history  16=Notes  17=Description  18=Fees
  19=Struct sanctions  21=Caseload  22=Change primary caseload
Opt Offender
21 BURCHFIE      All Caseloads      2006 PO      P
   CALHOUN,      2006 PO      P
   CARLOUGH      Offender: ██████████      2007 PO      P
   CARTER,      2006 PO      P
   CLARK, D      Caseload      Loc      2007 PO      P
   CROSTHWA      00377 RIOUX, JOE      OSCI      2007 PO      P
   EDWARDS,      00390 GENTLE, FAY      OSCI      2007 PO      P
   GITTS, R      3443 LEWIS, PAM      MTNO      2006 PO      P
   GROSZ, M      3970 PUGLIANO, TRACY      MTDV      2006 PO      S
   JOHNSON,      2007 PO LC      P
   KISTAIA,      2006 PO      P

                               Bottom      More...
F3=Exit  F  F7=Staff  F12=Cancel      int  F11=Menu bar
F12=Cancel      F23=More options
  
```

**3. Place the cursor on any name displayed and press <F7> Staff** to display the Caseload Staff window, which includes all names of a supervision team or just the primary officer, the location, and phone number when the officer(s) can be contacted.

```

CMS203I      TRAINING Corrections Information Systems      11:08:11
TISIS15      Caseload Staff                                07

Caseload numb
Enter option.  Caseload . . 00377 RIOUX, JOE
  14=Names    Name      Loc  Phone Number Extn
  19=Struct s Rioux, Joe      503-378-2492
Opt Offender
21 BURCHFIE      NA
   CALHOUN,      Bottom
   CARLOUGH      F4=Prompt  F12=Cancel
   CARTER,
   CLARK, D
   CROSTHWA      00377 RIOUX, JOE      OSCI      2007 PO      P
   EDWARDS,      00390 GENTLE, FAY      OSCI      2007 PO      P
   GITTS, R      3443 LEWIS, PAM      MTNO      2006 PO      P
   GROSZ, M      3970 PUGLIANO, TRACY      MTDV      2006 PO      S
   JOHNSON,      2007 PO LC      P
   KISTAIA,      2006 PO      P

                               Bottom      More...
F3=Exit  F  F7=Staff  F12=Cancel      int  F11=Menu bar
F12=Cancel      F23=More options
  
```

# CHAPTER 15.0

## Subset caseload or treatment programs

### Section 15.1

**Subset** - this function is used to select and display only that small part of a given larger group that meets specific, restrictive selection criteria. In ISIS, Subset is used to identify a specific group of offenders within your overall caseload who have certain characteristics in common, such as just your "HI" cases; or treatment program(s) that meet desired criteria such as substance abuse treatment in a certain county.

### Section 15.2

**To subset Caseload** - when viewing your caseload from the Offender Summary Screen, press <F17-Shift F5> Subset - this will display the Offender Subset Selection screen.  
<F4> Prompt is available on many of the fields which use a code or condition for a subset criteria.

### Section 15.3

**To subset Treatment** – when viewing your caseload from the Offender Summary Screen, press <F17-Shift F5> Subset – this will display the Offender Subset Selection screen to obtain the subset selection screen below.

```

CMS203I                      Corrections Information Systems                12:05:05
MCCARTHY                      Offender Subset Selection                7/12/07
Type choices, press Enter.
Name (LAST FIRSTM) . . . *ALL                *ALL, name, partial*
Status . . . . . *ALL                *ALL, status (PA, PR, IN)
Include outcounts . . . *NONE                *NONE, *ALL, *ONLY, code
Risk assessment . . . . *ALL                *ALL, *NEW, *UNA, HI, MED ...
Risk assessment due . . 99/99/9999        Due by date
Expiration date . . . . 99/99/9999        As of date
Home/Off contact/date . *ALL 99/99/9999        *ALL, type / As of date
Last monthly report . . 99/99/9999        As of date

Special condition . . . *ALL                *ALL, code
Treatment type/program. *ALL *ALL                *ALL, name

Address city . . . . . *ALL                *ALL, name
Address state/zip/zone. *ALL *ALL *ALL        *ALL, state / zip / zone

Case assignment . . . . *ALL                *ALL, P=Primary, S=Secondary
F4=Prompt  F5=Refresh  F12=Cancel

```

### Section 15.4

**NOTE** - if the example uses an asterisk (\*), you must too; e.g. \*ALL or the subset will not run.

### Section 15.5 - OFFENDER SUBSET SELECTION CRITERIA

- Name: Defaults to \*ALL
- Status: Defaults to \*ALL or choose from list on page 24
- Include Outcounts: Defaults to \*NONE = regular caseload; \*ALL = regular plus abscond; \*ONLY = Abscond only; F4 to prompt for individual codes
- Risk Assessment: Defaults to \*ALL = All classes; \*NEW = Only new cases; \*UNA = Unassigned cases; HI = High; MED = Medium; LOW = Low; LTD = Limited
- Risk Assessment due: Defaults to 99/99/9999 – enter desired date

Expiration Date: Defaults to 99/99/9999 – enter desired date

Home/Off Contact Date: Defaults to \*ALL 99/99/9999 – F4 prompt to display contact type list, enter desired date

Last monthly report: Defaults to 99/99/9999 – enter desired date

Special Condition: Defaults to \*ALL – F4 prompt to display condition code list

Treatment type/program: Defaults to \*ALL – F4 prompt to display treatment type list or to identify treatment programs

Address city: Defaults to \*ALL – type in desired city

Address state/zip/zone: Defaults to \*ALL – type in desired state/zip/zone (if applicable)

Case Assignment: Defaults to \*ALL or P=primary, S=secondary

### **Section 15.6 - OFFENDER STATUS CODES**

From Offender Summary Screen & Subset (Status)		
AP-Field Admission Pending	IV-Under Investigation	PO-Post Prison
CD-Prob/Conditional Discharge	LC-Local Control	PR-Probation
DI-Discharge	LP-Leave Pending	PS-Post Parole
DV-Probation Diversion	LV-Leave	SL- Second Look Juv
IN-Inmate	PA-Parole	SP-Second Look Pending

### **Section 15.7 - OUTCOUNT SELECTION CODES**

From Offender Subset Selection Screen	
ABSC-Absconded Supervision	PSRB-Psych Review Bd
CMPO-Compact Out – Oregon Offenders only	REVP-Housed in Federal Prison
IMMI-Immigration (INS)	UNSU-Unsupervised Parole/Post Prison
INAC-Inactive	USAP-Unsup Appeal
	WARR-Warrant for Non-Compliance

# CHAPTER 16.0

## To Locate Any Offender Using The "All Names" Window:

From the offender summary screen:

```

CMS200I      TRAINING Corrections Information Systems      10:42:53
TISIS15      Select Offender(s) to Work With              3/30/07

Type choices, press Enter.

Caseload number . . . . . LEWIS, PAM                      F4 for list

Name (LAST FIRSTM). . . . *ALL                          *ALL, partial*, F4 for list
.....
:                               Offender Name Search      :
: Position to . . . SMITH John Albert                      Loc: LANE          :
: Name                Birthdate  SID# Case Loc Status/Cell :
: AALTO, MISTY ROSE   C 04/15/1977 16434580 5324 YAMH Probation :
: AARON, CARLIE RICHELLE X 10/28/1977 12160734 5339 YAMH Probation :
: AARON, CARLY RICHELLE A 10/28/1977 12160734 5339 YAMH Probation :
: ABBEY, FRANKLIN DAVID C 07/17/1964 12138440 1575 DESC PostPrison :
: ABBIE, TERESA       A 06/29/1957 7077111 15703 CCCF Inmate(E2-09A) :
: ABBIE, TERESA DARLENE A 06/29/1957 7077111 15703 CCCF Inmate(E2-09A) :
:                                                                More... :
: F4=Prompt  F12=Cancel  F16=View description              :
:.....
F11=Menu bar      F12=Cancel
  
```

**Section 16.1 - <F12> Cancel** to "back up" one screen to the "Select Offender to Work With" screen.

1. Blank out caseload number field.

**Section 16.2**

With the cursor on the Name field, press <F4> Prompt to display the "Offender Name Search" window.

1. Type the name of the offender you want as follows: LASTNAME FIRSTNAME MI, and press <Enter> to move to or close to that name in the list.
2. The list may be restricted to a specific area by first placing the cursor on the "Location" field and either typing in the code for the county or other location; or pressing <F4> Prompt to view and select from the available locations.

**Section 16.3 - <F16-Shift F4> View Description** toggles, or alternatively displays, with <F16> View Status Data.

- a. Description lists basic offender descriptors, including sex, height, weight, hair, eyes, and race.
  - b. Status lists name type, birthdate, SID, caseload, location, and status/cell.
- NOTE: if alias, moniker, and/or true names have been entered, you can also find the offender by that name, and ISIS will automatically match up the court name.

# CHAPTER 17.0

## Add Offender Note

### Section 17.1 - <F11-2-N> or from the Offender Summary Screen option 16

1. Selecting the offender name:

- a. If called from or while displaying an Edit Offender Data or Chrono History screen, notes will automatically select that same offender and display their name on the note.

```

N Work Station Options
N Add Offender Note (F4)
T Add a To-Do Task
D W/W System Messages

Add Offender Note
Offender: ████████████████████
_O advised car broke down, can't make it
_to office
_____
_____
_____
_____
More...
F5=Refresh   F12=Cancel   F13=Insert
F14=Delete   F15=Wrap off
    
```

b. From any other screen, or if a different offender name is needed:

- 1) Type offender name LAST FIRSTM (<lastname> <space> <firstname middle-initial>) and press <Enter>, OR...
2. <F4> Prompt to display Offender Name Search window. (includes all offenders in system)
  - a) Type as much of the offender name as you know on the "Position to..." line, and press <Enter> to move as close as possible to the offender name you want.
  - b) <Page Up> and <Page Down> until you locate the name you want.
  - c) <Tab> to and place the cursor on the name
  - d) Press <Enter> to select the name.
  - e) <Tab> to the Location field, and change it to a specific location to restrict the Name Search to just that location, not the entire state. <F4> Prompt will display the available locations (county, institution, etc.)

```

2 Active_Jobs   WS_Options   Process_Step   Info_Windows
-----
: N Work Station Options           :
: N Add Offender Note (F4)         :
: T Add a To-Do Task               :
: D W/W System Messages            :
-----
: Add Offender Note               :
: Offender:                        :
-----
Offender Name Search
Position to . . . SMITH JOHN J      Loc: LANE
Name      Birthdate  SID#   Case  Loc  Status/Cell
AALTO, MISTY ROSE      C 04/15/1977 16434580 5324  YAMH Probation
AARON, CARLIE RICHELLE X 10/28/1977 12160734 5339  YAMH Probation
AARON, CARLY RICHELLE  A 10/28/1977 12160734 5339  YAMH Probation
ABBEY, FRANKLIN DAVID  C 07/17/1964 12138440 1575  DESC PostPrison
ABBIE, TERESA          A 06/29/1957 7077111 15703 CCCF Inmate(E2-0
ABBIE, TERESA DARLENE A 06/29/1957 7077111 15703 CCCF Inmate(E2-0
F4=Prompt   F12=Cancel   F16=View description
    
```

2. The window when first displayed is the "ADD MODE." The offender's court name will be displayed, followed by their SID number. Press <Tab> to move to the text entry area.

3. Type the text of the note. Press <Enter> once, the note is saved, and the window will switch to the **"CHANGE MODE."** If you need to make any corrections or additions, do so and press <Enter> again.
4. Press <Enter> a second time, OR <F12> Cancel to remove the note window.

**Section 17.2 - Notification Of Note Delivery** - How will you know a note has been sent, and by whom?

1. In your E-Mail inbox will be a message that an offender note on a specific offender has been received.
2. On the Edit Offender Data screen for that offender, the reminder **"NOTES"** will appear in the center.

```

CMS204I      TRAINING Corrections Information Systems      10:33:30
TISIS15      Edit Offender Data      DISPLAY      4/24/07
              6538 SMITH, PRESTON      SAN
SID#: ██████████ DOB: 3/23/1968 SSN: ██████████
Status: Parole      HI      BURG I THEFT I POS SUB CF+
1750 FRANKLIN BLVD. SPACE #8      Last attempted HV... 7/27/2006
EUGENE, OR 97403      Last completed HV... 7/27/2006
HmPh: 541)344-5526 WrkPh: 000)000-0000      Last office visit... 9/11/2006
UNAS      Last monthly report. 9/11/2006
UA LOG REFERRED TO TREATMENT      Employed? (Y/N).. Y 8/21/2000 100 %
              NOTES Next office visit... 8/28/2006 0:00

Date Time Place      Person      SC MR Key word
9/11/2006 14:25 O      Office      O      Offender      Y Y
O in with his GF, he said he might have a job doing asphalt work. O will keep his PO advised. O to see PO
in two weeks.
              SMITHP      09/11/2006
F3=Exit      F4=Prompt/PhoneHist      F5=Refresh      F7=Browse back      F8=Browse forward      F10=Print      F11=Menu bar
F12=Cancel      F20=History      F24=More keys
  
```

**Section 17.3 - To Read An Offender Note**

1. Select W/W Caseload from the main menu, then Option <2> Change on the name of the offender with the note.
2. Press <F21-Shift F9> Notes to display the Offender Notes window.
  - a. Top right hand corner - advises which note this one is, out of total number of notes present.
  - b. <F6> Create - allows user to write a new note for this offender.
  - c. <Page Up> and <Page Down> scroll up and down through long notes.
  - d. <F7> Previous Note and <F8> Next note move to previous or next note in series.
  - e. <F13> Change - allows the author of a note to change it; all other are excluded.
  - f. <F14> Delete - allows the owner of the case to delete the note if it is not important.
  - g. <F15> Move to chrono - places the note on the Edit Offender chrono screen. Press <Enter> to add note to chrono history.
3. Press <F12> Cancel or <F3> Exit to leave the notes window if still displayed.

```

Offender notes for ██████████      1 of 1
██████████
Entered: 4/24/2007 11:03 By: TISIS15
-----
O in and advised that car broke down so
he will not be able to make it to
office for appt.

Bottom
F3=Exit      F6=Create      F7=Prev note
F8=Next note      F13=Change      F14=Delete
F15=Move to Chrono      F12=Cancel      F24=More keys
  
```

# CHAPTER 18.0

## Option 23/24 Merge Documents to write reports:

### **Section 18.1**

**“Option 23/24” Merge Documents** - this option merges or combines a pre-existing form, report, or letter (called boilerplate text) with specific information pertaining to the selected offender. An example is merging the outline and section headings of a violation report with an offenders information, so that standard information like name, SID, docket number, and more, are filled in by the computer. This leaves only the sections the computer could not fill in, such as the allegation and substantiation sections, for the user to quickly and easily complete. The amount of user input will vary with the document; some documents are completed entirely by the computer, others require extensive user input.

Individual documents may be linked together to form a larger, multi-page document prior to merging. This will save the user time by doing all of the merge operations of several documents pertaining to the same offender all at the same time. After merging, any unwanted text is easily deleted. One example of this process would be to link a Detainer, a Show Cause Order, a Violation Report, and any other necessary form into one longer document. Within each office, staff has been designated to learn even higher levels of skills, so that they may maintain, copy, and create Option 23/24 documents for their office. Typically, this is the FAUG or SOON representative. Speak to them if you have questions about the use of an Option 23/24 document.

### **Section 18.2 - To access and select Option 23/24 Merge Documents**

1. From the Offender Summary screen (the alphabetical list of your caseload) select and type <23 or 24 based on the file format you will need for your system> in front of the name of offender you want to write a report, form, or letter about, and press <Enter>. This will e-mail the merge data to your e-mail folder and you will receive a message at the bottom of your screen that says “offender data has been sent via e-mail”.
2. Retrieve the information using your e-mail program and save the DOCSUM.TXT attachment to the drive designated by your county or FAUG Rep.
3. Document selection – go to the location where your Option 23/24 templates are stored and select the document/form/letter that you wish to use. Your document/form/letter will be displayed with merge fields in place.
4. Use your word processing program to initiate the merge process. When completed, the merged document will display. You may need to contact someone in your office who has received training on this procedure.
5. Save document to your designated folder in your word processing program.
6. Print document using your word processing program.

### **Section 18.3 - Notes regarding your individual requirements for merging documents**

---

---

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---

---

# CHAPTER 19.0

## Structured Sanction/Morrissey Package

### Section 19.1 – Select an Offender

1) To create a Sanction record for an offender on your caseload, select the offender by entering Option <19> in front of the offender's name on the Caseload Summary screen; this will bring up the Structured Sanction History Window.

```

CMS203I      TRAINING Corrections Information Systems      10:59:05
TISIS15      Work with Offenders Summary                  4/26/07

Caseload number . . . 3443  LEWIS, PAM
                               Position to . . .

Enter option...
 14=Names   15=Address history  16=Notes   17=Description  18=Fees
 19=Struct sanctions  21=Caseload  22=Change primary caseload
Opt O.....
M:                               Structured Sanction History      :
19 W:                               :
W: Offender: ██████████ :
W :                               :
  : Sanc Date T Stat Primary Violation, Sanction, Court Case caseload :
  :   2/10/2005 S COMP GC13 RPT TO PO   JAIL  MULT 030934572/01 2802 :
  :   12/06/2004 S COMP GC07 NO CHG EM/AD JAIL  MULT 030733408/01 3463 :
  :   8/25/2004 S COMP GC07 NO CHG EM/AD JAIL  MULT 030733408/01 3463 :
  :                               :
  :                               :
  :                               :
  :                               Bottom :
F3=E: F6=Add intervention  F7=Add sanction  F10=Print  F12=Cancel :
F12 :                               :
.....
  
```

2) Press <F7> to create a new Sanction record.

```

CMS251I      TRAINING Corrections Information Systems      11:29:31
TISIS15      Sanction Record                               4/26/07
                               CREATE

Offender: ██████████
Current Status. PostPrison           Sanction location MTNO
Birthdate 7/13/1982   Admitted date... 7/21/2006   Sanction caseload 3443
Status... PO           Docket Max date. 7/20/2008   Supervision level MED
                               Risk score..... 9

Conditions violated:           Prior sanctions reported:
P                               Prior violations of primary:

Sanction Creation date 4/26/2007   Sanction status   Decision Date
Date Notified Rights..           Custody end date.....
Custody begin date....           Court case Grid (S/H).
Hearings officer required.. N     Exception sanction imposed. N   Judge/PB
|---Sanction Recommended---| |----Sanction Given----| Override
Court case Code Unit Auth UserID   Code Unit Auth UserID   Code Unit

More...

F3=Exit      F5=Refresh      F7=Browse backward      F8=Browse frwd
F11=Menu bar F12=Cancel      F19=View Offense
  
```

3) Enter the primary condition violated (press <F4> to select from a list). If more than one condition was violated, enter the secondary violations in the other fields; a total of 5 conditions violated can be selected.

4) Enter the date the Sanction is imposed.

5) Enter Decision Date.

6) If offender was given rights, enter date rights were given.



# CHAPTER 20.0

## Structured Sanctions & Movement History

### Section 20.1 - Sanction Movement Tracking

To record “actual servitude” of a sanction, you must accurately reflect the movement of the offender while serving the sanction. This is intended to reflect exactly how many days/units an offender served within a variety of housing environments.

- 1) The W/W Sanction Movement screen can be accessed a variety of ways: 1) from the PPO Main Menu (**Option 42**), or 2) from the Menu Bar/InfoWindows within the Sanction Record itself.

```
CCPPO          TRAINING Corrections Information Systems      9:15:14
TISIS15        ISIS PPO Main Menu                          4/27/07
Select one of the following:

 37. Change User Password
 38. OR Corrections Plan (Inmate)
 39. Criminogenics (Inmate)

 41. W/W County Inmate Status
 42. W/W Sanction Movements
 44. W/W Release Plans - Location
 45. W/W Release Plans - Caseload
 46. W/W Release Plans - Offender
 47. W/W Supervisor Warrant Review
 48. W/W Supervisor SRF Review
 49. Print Parole Board Orders
      More...

Selection:                               Job:

F3=Exit   F4=Prompt   F10=Move to top   F11=Menu bar   F12=Previous menu
```

- 2) Once within the W/W Sanction Movements screen, verify that the correct offender is displayed; if not, enter the correct SID# or use the <F4> Prompt on the Offender field to locate and display the correct offender.
- 3) To begin, choose the type of movement (use <F4>). The two possible choices are either SANC for a Structured Sanction movement, or VLSA for a court-imposed sanction resulting from a formal violation hearing. The LC and LCRB movement types are used by your counties Local Control Authority.
- 4) Then enter the Start date/time to reflect when the offender actually began serving the sanction. If this is being entered at the time the offender is lodged, you will not know the Stop date/time. Do not try to predict when the offender will be released, as this will not accept a future date. You will need to come back after the offender has been moved/released from this housing assignment to enter the Stop date/time.
- 5) Choose from the available Supervision Status codes (use <F4> to choose) to reflect the actual housing assignment the offender is placed in.
- 6) Now identify the Sanction that this movement is tied to, by pressing <F4> on the Sanction Date field. This will display all the Sanctions that have been recorded on the system. Select the Sanction record by putting the cursor on the correct record and pressing <Enter>. You should see the Sanction Record date and Court case displayed.

7) Press <Enter> to add this movement to the Sanction Movement history.

```

OPS177I      TRAINING Corrections Information Systems      9:26:25
TISIS15      W/W Sanction Movements                      4/27/07
                                           CHANGE
Offender..... ████████████████████████████████████
Status..... PostPrison      MTNO
Movement type..... SANC      Start date/time.... 04272007 0800
                                           Stop date/time.....
Sanction Movement Code..
:
Enter option..... 2=Change  5= :
Move  Start  Stop  L : Position to code . . . . . :
Opt  Type  Date  Date  C :
SANC  8/28/2005  9/06/2005  : Code  Description      type :
LC    11/14/2002 12/20/2002 W : ALEM Alcohol Electronic  S  :
                                           : COCO Court Confinement  S  :
                                           : COGN Cognitive Restructuri V  :
                                           : CSWK Ordered Comm Ser Work S  :
                                           : CURF Curfew              V  :
                                           : DAYR Day Rpt.no cu un used S  :
F3=Exit      F5=Refresh  F9=Retr : F4=Prompt  F12=Cancel  :
F11=Menu bar F12=Cancel  :

```

8. To update the record later (to enter the Stop Date/Time), display the Sanction Movements screen, then open the record by putting a <2> on the option line of the record itself and pressing <Enter>; the record should be displayed in “change” mode, allowing you to complete the record.

```

OPS177I      TRAINING Corrections Information Systems      9:42:02
TISIS15      W/W Sanction Movements                      4/27/07
                                           CHANGE
Offender..... ████████████████████████████████████
Status..... PostPrison      MTNO
Movement type.....          Start date/time.....
                                           Stop date/time.....
Sanction Movement Code..          Sanction date and... (F4=Select)
                                           ..court case.....
Enter option..... 2=Change  5=Display
Move  Start  Stop  LC  Resp Supv  Sanction
Opt  Type  Date  Date  Cnty  Loca StsCD  Date  Court Case
 2  SANC  8/28/2005  9/06/2005  MTDZ  JAIL  9/06/2005  WASH C021462CR/01
LC    11/14/2002 12/20/2002  WASH  LWSH  JAIL

```

# CHAPTER 21.0

## Use the To-Do List to manage my caseload

### Section 21.1 - ACCESS & Use the To-Do List

1. From the PPO Main Menu, type <1> W/W To-Do List and press <Enter>.

```

CCPPO          TRAINING Corrections Information Systems          10:53:54
TISIS15        ISIS PPO Main Menu                               3/19/07
Select one of the following:
  1. W/W To-Do List
  2. W/W Caseloads
  3. W/W Treatment Programs
  4. Offender Information Screen
  5. Fee Balances by Caseload
  6. W/W Supervision Fees
  7. W/W Structured Sanctions
  8. W/W Risk Assessments
  9. W/W STATIC-99 Assessment
 10. W/W Sex Offender Assessment
 11. W/W Court Orders
 13. W/W Warrant Request (Offender)
 14. W/W Warrant Records (by PO)
      More...
Selection: 1
F3=Exit    F4=Prompt    F10=Move to top    F11=Menu bar    F12=Previous menu
    
```

2. From any ISIS program where the Menu Bar is available: Only jobs you have suspended will be listed.

- a) Press <F11> to display the Menu Bar.
- b) Type <1> to display the Active Jobs.
- c) Type <corresponding letter> to select the To-Do List.

```

1  Active_Jobs  WS_Options  Process_Step  Info_Windows
-----
:  W/W Caseloads
:
: B Offender Information Screen      :  AM
: C W/W To-Do List
: M CIS Initial Job                  :  5=Display  6=Print chrono  7=DNA req.
:                                     :  tracking   13=Treatment programs
:                                     :  Expir Date Cls  Reass Due Status P/S DNA
: : 0 5/03/2008 MED 11/04/2006 PO    P
: : 8 4/27/2007 MED 11/01/2006 PO    P
: : 0 4/03/2008 HI  1/11/2007 PO    P
: : 4 3/12/2008 HI 12/12/2006 PO    P
: : Bottom : 0 8/30/2007 HI 2/28/2007 PO    P
: : ..... : 5 10/31/2008 HI 1/17/2007 PO    P
: EDWARDS, AARON                    15164314 6/26/2009 MED 2/22/2007 PO    P
: GITTS, RYAN                        14413732 5/31/2007 HI 12/01/2006 PO    P
: GROSZ, MICHAEL                     14535103 3/04/2009 HI 12/12/2006 PO    S
: JOHNSON, ROBERT G                   9225154 4/09/2007 HI 3/07/2007 PO LC  P
: KISTAIA, AUBREY                    13054018 6/01/2011 MED 12/02/2006 PO    P
:                                     :  More...
F3=Exit    F4=Prompt    F5=Refresh    F6=Add offender  F10=Print  F11=Menu bar
F12=Cancel  F13=Repeat   F17=Subset    F19=Summary     F23=More options
    
```

3. <F9> Retrieve: brings unfinished tasks forward to today's list so you don't forget them.

#### 4. <F6> Add Task: used to write and add a new task or reminder to your To-Do List.

```
CMS400I          TRAINING Corrections Information Systems          11:04:52
TISIS15          Work with To-Do List                            3/19/07

User . . TISIS15      Date . . 3/19/2007  Monday
                               Position to . . . . .

Enter option...
  2=Change  3=Copy   4=Delete  5=Display  7=Needs  11=Move
 12=Complete 13=ReOpen 15=Process

Opt  Priority  Entry Text
     *A       Complete Risk Assessments
     *B       Complete SRF on Ward #1234567
02.06.2005 Superbowl party- John's house
02-03-2005 ***JOE BLOW 12:30***

                                               Bottom
F3=Exit  F5=Refresh  F6=Add task  F7=Browse backward  F8=Browse forward
F9=Retrieve unfinished tasks  F14=Generate entries  F24=More keys
Past uncompleted tasks have been retrieved.
```

5. **Option <12> Completed:** used to mark each item as it is done, so it won't be retrieved tomorrow.
6. **Option <13> Reopen:** used to reopen a completed task.
7. **Option <2> Change:** used to modify an existing To-Do task.
8. **Option <3> Copy:** used to copy a task to another user's To-Do list, and/or another date and/or other priority. Since you are copying to another list, the "original" task stays on your list, on the original date.
9. **Option <11> Move:** used to move a task to another user's To-Do list, and/or another date, and/or priority. It will be removed from the original list. And if you move it to another user's list, you can't get it back.
10. **Option <15> Process:** temporarily takes you from the generated entry list directly to a work screen, e.g. going from an offender whose risk assessment is due to the risk assessment screen, or to the offenders Edit Offender Data screen to enter a contact. When done, you are returned to the To-Do List screen.

### **Section 21.2 - Effects of using past, present, and future selection dates**

**Past:** Shows status of your caseload at that time, e.g. who needed significant or other contacts; who was referred to or pending completion of treatment; or if an assessment needed to be completed.

**Present (default or current date):** Shows current status of your caseload, as of today; e.g. offenders needing significant contacts and how many; the risk reassessments now due; offenders currently referred to or pending completion of treatment; and those offenders who are due for a home or office visit.

**Future (used to plan your future casework and schedule):**

*Significant Contacts* - updated every 15 days to meet OCMS standards; set to last day for current month to see how many significant contacts will be needed this month, or remain to be accomplished this month.

*Risk Re-assessment* - set to 30, 60 or 90 days in the future to determine which offenders will need reassessment.

*Treatment Referrals made prior to* - usually run on current date only.

*Treatment completion due* - set 6 or 12 months in future, to remind you of which offenders should finish treatment.

*Office Visits due* - set to first day of next month (or more) to see which offenders are due to report to office. If printed, can be a checklist of who has and has not reported. Run weekly if using as a checklist.

*Home visits due* - set to first day of next month to see which offenders are due for a home visit. Low/Limited offenders are not included in this category.

**<F10> Print** – use anytime to make a printout of your To-Do List to use as a checklist.

*Contact numbers are specific to the county/location. They reflect local standards, so some contacts may not show if not required locally.*

# CHAPTER 22.0

## Generated Entries

### Section 22.1- Generate Entries

Use Generated Entries to track offender contacts and treatment status, to help you manage your caseload.

**CAUTION:** Generated Entries will only work for you if you put the necessary information into ISIS, such as correctly chronoing offender contacts, and recording treatment referrals and start of treatment dates.

```
CMS400I      TRAINING Corrections Information Systems      11:25:31
TISIS15      Work with To-Do List                        3/19/07
User . . TISIS15      Date . . 3/19/2007  Monday
                                     Position to . . . . .
Enter option...
  2=Change  3=Copy   4=Delete  5=Display  7=Needs  11=Move
 12=Complete 13=ReOpen 15=Process
Opt  Priority  Entry Text
      *A      Complete Risk Assessments
      *B      Complete SRF on Ward #1234567
02.06.2005 Superbowl party- John's house
02-03-2005 ***JOE BLOW 12:30***
                                     Bottom
F4=Prompt  F10=Print  F11=Menu bar  F12=Cancel  F13=Repeat
F15=Remove generated  F16=Exclude completed  F24=More keys
```

#### KEYS TO USE:

- <F14-Shift F2> Generate entries:** will display report options. All default to today's date, but past and future dates may also be used.
- <F15-Shift F3> Remove generated:** removes generated entries from To-Do list - always do this when you are done with the list.
- <F16-Shift F4> Exclude completed:** used to "hide" from view, or re-display, tasks marked as completed

### Section 22.2 - Specific Generated Entry selections include:

1. **Significant contacts:** Will display name of offenders needing contacts, tell how many contacts are due, and by what date they are due. *Use default date for current contacts needed; use a future date e.g. first of next month; to find who needs how many contacts.*
2. **Risk Reassessment:** Will display offenders who need to have a new risk reassessment, and the date by which the assessment is due. *Use default date for list of current assessments due' select a future date 6 to 12 months ahead to list pending assessments.*
3. **Treatment referrals made prior to:** Will display names of offenders who are listed in the treatment files as having been referred, but not started, in a treatment program.
4. **Treatment completion due:** Displays those offenders who should complete treatment as of the specified date. (This is based on the average length of treatment field in the W/W Treatment Program directory.) *Use default date to list offenders who are expected out of treatment now; use future dates (6-12 months ahead) to predict who will end treatment.*
5. **Office visits due:** displays those HI and MED offenders who need office visits, number of visits needed by what date.

6. **Home visits due:** displays those HI and MED offenders who need home visits, number of visits needed by what date.

*NOTE: office and home visits may not show any names, if such contacts are not required locally.*

```
CMS400I      TRAINING Corrections Information Systems      11:27:28
TISIS15      Work with To-Do List                          3/19/07

_User . . TISIS15      Date . . 3/19/2007  Monday
                               Position to . . . . .

Enter option...
  2=Chang
 12=Comp
Opt  Pri
      Caseload . . . 3443 LEWIS, PAM
  *A
  *B      Significant contacts due by      3/19/2007
02.      Risk re-assessment due by      3/19/2007
02-      Treatment referrals made prior to 3/19/2007
          Treatment completion due by    3/19/2007
          Office visits due by          3/19/2007
          Home visits due by            3/19/2007
                               Bottom
      F4=Prompt  F5=Refresh  F12=Cancel

                               Bottom
F3=Exit  F5=Refresh  F6=Add task  F7=Browse backward  F8=Browse forward
F9=Retrieve unfinished tasks      F14=Generate entries  F24=More keys
```

To use, type in the desired date(s) on the selected criteria, and press <Enter>

# CHAPTER 23.0

## PO Special Report Process

### **Section 23.1- Special Reports**

Access: From the main PPO Menu type <16> CC Reports Menu then hit <Enter>

PO Special Reports is used to create reports useful for monitoring case management by an officer, or a supervisor. Although the last reports in this series are labeled as Management Reports, they are available to any officer to help monitor their own compliance with OCMS contact standards and other similar issues.

### **Section 23.2**

**Report screen format** – can be located in the Reports Manual located on the DOC home page website.

NOTE: if an example uses an “\*”, You must too or the report will not run.

### **Section 23.3**

**Default settings** - These are the Codes you will change as needed, to achieve your report needs.

\*TODAY - due as of this date. May be set to future dates for future caseload activity planning.

\*ALL - includes all members of the specified topic; e.g. all risk classifications HI, MED, LOW, LTD, etc.

\*DFT - (default). In PO caseload number, the default is the caseload number associated with you, the user. Character Value - a caseload number or location (county) code other than the default.

\*DSP - Run Options include \*DSP (Display), \*PRT (Print) or \*ALL (Display and Print.)

To run a report: Set the Code Criteria to meet your needs. .

1. PO Reports will default to display a report as of the current date. Change date and other codes as needed.
2. Management Reports print only. You must specify the start and end dates to define the time period the report will cover.
3. Press <Enter> to run the report.

# CHAPTER 24.0

## Release Planning

### Section 24.1 - W/W Release Plans to complete a field investigation

There are 3 options on your Main Menu to work with Release Plans: by Offender (SID), by Caseload, or by Location. You will need to select the most appropriate view, depending on your role.

W/W Release Plans by Location: all active plans for offenders being released to a specific location.

W/W Release Plans by Caseload: all plans assigned to a field counselor caseload for investigation.

W/W Release Plans by Offender: all plans that have been created for an offender.

```

CCPPO          TRAINING Corrections Information Systems          11:25:19
TISIS15          ISIS PPO Main Menu          3/27/07
Select one of the following:
  37. Change User Password          |
  38. OR Corrections Plan (Inmate)  |
  39. Criminogenics (Inmate)       |
  41. W/W County Inmate Status      |
  42. W/W Sanction Movements        |
  44. W/W Release Plans - Location |
  45. W/W Release Plans - Caseload |
  46. W/W Release Plans - Offender |
  47. W/W Supervisor Warrant Review |
  48. W/W Supervisor SRF Review     |
  49. Print Parole Board Orders      |
                                     More...
Selection:          Job:
F3=Exit  F4=Prompt  F10=Move to top  F11=Menu bar  F12=Previous menu
  
```

**Section 24.2 - Create new Release Plan** If the offender is being released from a DOC institution, a Plan will be created automatically 120 days prior to release. If offender is LC, use the <F6> Create to create a new Plan; confirm SID#, press <Enter>, press <Enter> again.. The plan location will be created and assigned to the same location as the offender.

```

TISIS15          Work with Offender Release Plan(s)          3/29/07
Offender . . . ████████████████████
Current Sts.          County Community Corre
Enter option  Add Offender to Release Plan Process  lease Date..
2=Change          UNKNOWN RELEASE-PLAN CASELOAD  nt  13=Complete LC
14=Chrono          Note 21=Caseload
Opt Phy Rel D  Offender: ██████████          atus  Approve Dt
                 ██████████
No relea  F4=Prompt  F12=Cancel
          Select offender for release plan.
F3=Exit  F4=Prompt  F5=Refresh  F6=Create  F10=Print  F11=Menu bar
F12=Cancel  F13=Repeat
  
```

**Section 24.3 - Edit Plan** to enter or change the information within a plan, enter a <2> in front of the plan and press <Enter>. If field has "\*" symbol next to it, use <F4> to see additional info.

**General Info screen:** select Plan Type (use <F4>), then <Tab> to Physical Release Date (this is date that the LC sentence will be complete - NOT the date that the inmate is moved from the jail to a field custody program). <Tab> to Sent Guidelines Grid score, enter score, <Tab> to enter proposed address. Enter any special conditions requested by using <F4> on Conditions field - if more than 1 selected, they will be listed across the screen horizontally.

**Community Info screen:** enter Field Counselor Caseload to reflect PO assigned to field investigation. Complete Sponsor/Relationship field, Employer/Contact, Employer ph#, and Transport By.

**Institution Info screen:** Inst Counselor is person reviewing Release Plan w/inmate during sentence. Months Supv Remaining, round off to full month. Can add COFO's to plan by using <F4> on Financial Oblig. Crime Type: S= Sent Guidelines, M=Matrix case. Can also specify Reporting Conditions by using <F4> on Detail. Enter any notes or other misc info on lines above Conditions.

**Parole Board Info screen:** Confirm or enter Institution Counselor and/or Field PO. Do not use the "Send Completed Plan to" field, if needing to send to another location, exit the plan and use the "Send" option.

**W/W Offenses, W/W County Inmate Movement, W/W Sex Offender Assessments,**

**Chrono:** these screens are attached to the Release Plan for your convenience, if you don't need them please disregard.

```

PBM214I      TRAINING Corrections Information Systems      9:19:00
TISIS15      Transition Planning and Release Form          4/20/07

                *OLD PLAN* - May contain incomplete data.

SID#: █████ CHANGE Name: █████ Probation                Wrap On Location: YAMH
Yamhill County Community Phy release date                DOB : 10/28/1977 Plan type....(*) FI Fld
Invest SSN#: █████ SS Card: Primary Language: Veteran Status: Valid
ODL/ID#: Status: Trans. Leave: N 2nd Look: Months of Community
Supv: Grid: 1 H Dischg at release: N Parole Release date: Releasing
Institution: Field Inv Officer: Release Counselor: Assigned PO:
Detainers (*) N

Notable issues:_____

More... F3=Exit F4=Prompt F5=Refresh F10=Print F11=Menu bar F12=Cancel
F13=Insert F14=Delete text F15=Wrap on F24=More Functions

```

**Section 24.4 - Send Plan** if Plan needs to be returned to the Institution, or forwarded to another county location (transfer request), use the "Send" option. Enter the receiving location code, press <Enter>. Should get confirmation msg at bottom of window.

```

PBM212I      TRAINING Corrections Information Systems      10:35:34
TISIS15      Work with Offender Release Plan(s)          3/29/07
Offender . . [REDACTED]
Current Sts. Probation          Loca. YAMH Yamhill County Community Corre
Enter option...
  2=Change  4=Delet  :
  14=Chrono hist  1  :      Send Release Plan To Selected Location  :
pt Phy Rel Dt Off F  :      Change  :
6              : Offender: [REDACTED] :
                  : Send release plan to....
                  : Current Release plan loc YAMH Yamhill County Community :
                  : Release to county..... YAMH Yamhill :
                  : Current offender loca... YAMH Yamhill County Community :
                  : Inst Rel Plan Counselor. :
                  : Comm Rel Plan Counselor. 5399 RELEASE PLANS - YAMHILL :
                  : Prj Rel Dt  Phy Rel Dt  Appv Date  Status :
                  :                               Community :
F3=Exit  F4=Prompt : F4=Prompt  F5=Refresh  F12=Cancel :
F12=Cancel : File SYUSERL5 in library *LIBL not found or inline d. :
Offender release pl :.....:

```

**Section 24.5 - Complete LC:** If offender is currently Local Control status, the Supervisory Authority can mark the plan "complete" by using option <13>. If the offender has already been released and admitted onto PostPrison, the field cannot use the "Complete LC" option, need to contact FAST Team to have them mark as complete.

If needing to move from one caseload to another at same location, simply change the Field Counselor caseload #. If you want to move to a caseload at a different location than where the plan currently is, you need to send to that location first, then have the receiving location make the change to the desired caseload.

# CHAPTER 25.0

## SUPERVISOR REVIEW – WARRANTS

### Section 25.1 – Supervisor Review (SRF)

The Supervisor Review for Warrants process allows warrant requests to be 'passed' electronically from one ISIS user to another ISIS user. This eliminates the need to actually print out a draft form until the request has been approved. After the electronic review process has been completed, a final report can be printed and signed for the file.

```

CCPPO      TRAINING Corrections Information Systems      10:40:22
TISIS15    ISIS PPO Main Menu                          3/29/07
Select one of the following:

 37. Change User Password
 38. OR Corrections Plan (Inmate)
 39. Criminogenics (Inmate)

 41. W/W County Inmate Status
 42. W/W Sanction Movements

 44. W/W Release Plans - Location
 45. W/W Release Plans - Caseload
 46. W/W Release Plans - Offender
 47. W/W Supervisor Warrant Review
 48. W/W Supervisor SRF Review
 49. Print Parole Board Orders
      More...

Selection:                                     Job:                                     F3=Exit
F4=Prompt   F10=Move to top   F11=Menu bar   F12=Previous menu
  
```

1. When a warrant request has been sent to you electronically, you will receive an e-mail message indicating this. The message will include the offender's name and SID#. After receiving the e-mail, exit to the Main Menu, and select "**W/W Supervisor Warrant Review**". This will show you all warrant requests that have been sent to you.
2. Use **option <5>** to review warrant request.
3. If approved, use **option <15>**, then enter <Y> for "Supervisor approves". If the warrant request needs to be forwarded on to the Parole Board, enter <Y> here as well; if a Probation or LC warrant request, do not send to Parole Board.
4. If not approved, use **option <15>** to return to PO by entering the PO's UserID. The PO will receive an e-mail indicating that the request has been returned.

```

PBM206I    TRAINING Corrections Information Systems      10:48:14
TISIS15    Work With Warrant Supervisor Approval      3/29/07
Requestor UserID.: TISIS15   training, profile      CHANGE
                                          Subset Status
Enter option...                          Pending
 2=Change   4=Delete   5=Display   6=Print Warrant  7=View Brd Note
 10=PO Send 12=LC Dates 13=Complete LC 15=Supv Apprv 16=Chrono Entry
Opt Offender      Sid No   Entry date Spv Caseld Type Cnty Sts  Lvl BdNt
No warrant request exist on system for selected Requester ID and/or Status
F3=Exit   F4=Prompt   F5=Refresh   F6=Create PA Warrant   F10=Print
F8=Create LC Warrant   F11=Menu bar   F7=Create PR Warrant   F24=More Function
  
```

### Section 25.2 - Supervisor's Review - Sanction Reporting Form (SRF)

The Supervisor Review for SRF's process allows a supervisor to review and monitor active sanctions and Morrissey Hearings. When an SRF is forwarded electronically for approval, it is added to the supervisor's list, where it can be monitored until the hearing is complete.

1. After receiving the e-mail notice that a Sanction Reporting Form has been submitted to you for approval, go to your Main Menu and select "**W/W Supervisor SRF Review**"; this will show all the SRF's that have been sent to you.
2. Use **option <5>** to review an SRF. While reviewing, use **<F18-Shift F6>** to view HO text.
3. If the SRF is approved, you can then complete the SRF ( if no HO is needed), or send the SRF to a Hearings Officer.
  - a) If no Hearings Officer is needed, use **option <2>** to change the form, entering the actual sanction that was given under the "Sanction Given" portion of the form. After all info is entered, press <Enter> twice. Then use **option <16>** to set the sanction to "Complete" status.
  - b) If the SRF needs to go onto a Hearings Officer, use **option <15>** to send it electronically. When you send it, the Status will change from SUPV to HO.
4. If the SRF is not approved, use the **option <15>** to send back to the submitting PO. The PO will receive an e-mail indicating that the SRF has been returned.

```

CMS267I      TRAINING Corrections Information Systems      10:50:45
TISIS15      W/W SRF Officer Morrissey Assignments      3/29/07

SRF Officer Userid... TISIS15      training, profile
                                                    By date order

Enter option...      Sanction Date...
 2=Change   5=Display   9=Auto send to Brd   10=Print
15=Supv send rpt   16=Status to COMP   17=HO send rpt   18=Brd note
Opt Offender Name      Sid No   Loca Sanc Date   Notify dt   Hearing dt   Stat Typ

      No offenders morrissey plans for this hearings officer

F3=Exit      F4=Prompt   F5=Refresh   F10=Print Assignments   F11=Menu bar
F12=Cancel   F13=Repeat   F17=Subset   F18=Alpa list   F19=Summary
  
```

# CHAPTER 26.0

## Warrants

### Section 26.1 – “Go To”

For Parole Board warrants, select W/W Warrants by Offender (Option #13 from PPO Main Menu). If you need a PPS or Probation warrant for an offender, you will need to use an Option 23 or 24 report to create it; currently the system cannot track these warrants.

```
CCPPO      TRAINING Corrections Information Systems      10:27:53
TISIS15    ISIS PPO Main Menu                          4/26/07
Select one of the following:

1. W/W To-Do List
2. W/W Caseloads
3. W/W Treatment Programs
4. Offender Information Screen
5. Fee Balances by Caseload
6. W/W Supervision Fees
7. W/W Structured Sanctions
8. W/W Risk Assessments
9. W/W STATIC-99 Assessment
10. W/W Sex Offender Assessment
11. W/W Court Orders

13. W/W Warrant Request (Offender)
14. W/W Warrant Records (by PO)
More...

A. W/W Caseloads

Selection: 13      Job:

F3=Exit  F4=Prompt  F10=Move to top  F11=Menu bar  F12=Previous menu
```

```
PBM203I    TRAINING Corrections Information Systems      10:33:39
TISIS15    Work with Offender Warrants                    4/26/07

Offender . . . ████████████████████████████████
Current Status PostPrison      Multnomah North Office
Enter option...
2=Change      4=Delete      5=Display      6=Print wrnt      7=Brd note
8=Rev sentwrnt 10=Send wrnt 12=LC Dates 13=Complete LC 15=Supv Apprv..
Opt Entry Date Supv Case Cnty Sts Description Type Expire Dte Reqstr ID

No warrants found for offender

F3=Exit      F5=Refresh      F6=Create PA Warrant      F7=Create PR Warrant
F8=Create LC Warrant      F10=Print F23=More Options      F24=More Functions
WINTERS DANIEL is the court name for WINTERS DANIELM.
```

### Section 26.2 - Parole Board Warrant

1. Press **<F6> Create PA Warrant**: this will open a new warrant window. Confirm SID#, press **<Tab>**. Requester ID is person requesting warrant (if you are supervising PO, leave your ID here; if you are support staff, enter supervising PO userID here) press **<Tab>**. When requesting warrant, "Wrnt Type" remains "WREQ"; press **<Tab>**. Press **<F4>** to view all cases, enter "1" for primary case, "2"- "5" for any other cases you wish to attach to the warrant; press **<Enter>** to return to Warrant window. Press **<Tab>** to move to Address: the last known address from the Chrono file is by default displayed; as most warrants are due to absconding, enter "unknown" for address; press **<Tab>**. Enter the basis for your warrant in the bottom of the window. The Parole Board does not require a formal "report" here, simply about 6 lines or less that detail the (lack of) action of the offender and the PO's attempts to contact the offender. *[If your supervisor requires a formal report format, the Board asks that you begin with a paragraph as described above, then below that paragraph begin your formal report. This will allow the Board to review*

*the warrant request without having to move through a full report 6 lines at a time]. Press <Enter> when the request is complete.*

2. Once the request is complete, you will need to send it to either a Supervisor or the Board (depending on local policy). Enter a "10-Send" in front of the warrant; press <Enter>. If sending to Supervisor, enter his/her userID and leave "Send to Board" as "N". If sending to Board, use <Tab> to move to "Send to Board" and enter "Y"; press <Enter>. The request will be sent onto the designated recipient at this time (notice the status has changed to either "Supv Review" or "PB Pre-vote").

### **Section 26.3 - Probation Warrant**

1. Press <F7> **Create PR Warrant**: you will need to select from MSK1 (Probation Abscond Warrant), MSK2 (Probation Abscond Wrt with Affidavit), or MSK3 (Probation Abscond Wrt w/Affidavit and Orders) - use <Tab> to move to desired format, press <Enter>. Follow same steps as Parole Board Warrant to complete request form. Press <Enter> to add Warrant Request to system.

2. If needing to send to supervisor for approval, use the "10-Send" option and enter his/her UserID. To update the status of a Probation Warrant, you must open the request (by using "2-Change"), then using <F4> on Status; select the current status of the request (Complete, Issued, Withdrawn, etc...). Once the offender has been arrested on the warrant, be sure to change the status to "Complete".

### **Section 26.4 - Local Control Warrant**

1. A "Local Control Warrant" currently is used only on an escaped or absconded Local Control Inmate. If the offender has been released onto PPS from a Local Control sentence before absconding, you would need to use an Option 20 report to create an LC Warrant Request report. Do not create a Parole Warrant request for these offenders, as the warrant will not be able to be marked "complete".

2. Press <F8> **Create LC Warrant**: this will open a window very similar to the Parole Board request. Follow the same steps (see above - "Parole Board Warrant") .

3. To send to supervisor or another user (possibly the Local Supervisory Authority designee), use the "10 - Send" option, and enter the correct UserID.

4. To update the status of the warrant request, use option "12 - LC Dates" to track the Entry Date, Issue Date, and Arrest Date.

# CHAPTER 27.0

## USING OFFENDER PUBLIC INFORMATION

### Offender Information - "public" information regarding the offender

```

OPS501I      TRAINING Corrections Information Systems      11:18:18
TISIS15      Offender Public Information                  3/30/07

Offender...  ████████████████████████████████████████      Status. Inmate
Location...  CCCF COFFEE CREEK CORRECTIONAL FACILITY Cell. C123A
                                                    DOC cycles. 01-25-01

Age    51          DOB    7/14/1955
Sex    Male        Race  WHITE      Inst admission date... 08/22/2006
Height 5'09"       Hair  BROWN     Earliest release date. 03/19/2008
Weight 160lbs     Eyes  BLUE

Caseload 01409 BENNETT, LARRY
Classification
Court Case  Cnty ORS Abbrev Cls Type Begin Date Yrs-Mos-Days Term Date & Code
811035174/01 MULT ROBB I AF I 8/28/1986 010-000-000
060532886/01 MULT UN USE VEH CF I 8/22/2006 000-013-000
060633430/01 MULT UN USE VEH CF I 8/22/2006 000-013-000

                                                    Bottom
F3=Exit      F4=Prompt    F5=Refresh   F6=PTA Caseload    F9=Retrieve
F11=Menu bar F12=Cancel   F17=All offenses
  
```

### Section 27.1 - To Access

Select Offender Information from the Main ISIS Menu, either by letter if pre-loaded, or by number from menu.

1. Enter SID number for offender, or press **<F4> Prompt** to select an offender to work with.
2. If **<F4> Prompt** is used - select offender from the Name Search window. By default, the window displays offender status information; press **<F16-Shift F4> View Description** to see a brief description of each listed offender.
3. After selection, the "Offender Public Information" screen will display.
4. Press **<F11> Menu Bar**, **<4> Info-Windows** to display Information Windows available. To select a window, type the identifying letter for that window, OR type an asterisk (\*) to view each window in turn.
5. The Information Windows available are:

**C – W/W Offenses/Court Orders** - Shows prior and current court cases. Place cursor on any case and press <Enter> to display specific case information. Use <F7> Browse Backward and <F8> Browse Forward to move between the offender's cases.

**A - Admission/Release History** - details of admission and/or release to DOC supervision.

**H - Housing History** - details of county and caseload assignment

**I - Initial Trust Accounts Select** -

**P - Institution Program Window** - history of programs offender has been in; <F16> between Current Custody and History.

**V - Visitor List** -approved institution visitors

**R – Relationships – by Inmate** - active and discontinued relationships

**M – W/W Offender Health Status** –

**J – Trips** -

**T - Community Treatments** - community treatment, can enter program and referral data here.

- G – Supervision Conditions** – list of conditions by case or docket number, authorized user may update data here.
- F - Supervision Fees** - supervision fee status; can enter payments here too.
- U - Urinalysis** - UA test log; authorized user may enter test data from this screen.
- N - Names** - list of court, true, moniker, and alias names associated with offender; may add new ones here.
- X - Addresses** - history of physical and mailing addresses; may enter new addresses here.
- D - Descriptions** - displays physical description and social history information.
- S - Scars, Marks and Tattoos** - uses OPS list of identifiers, can add comments to descriptors.
- B - Other Numbers** - for listing any numbers identified with the offender.
- Y – W/W Detainers** - to enter any detainer against offender; will flash on Edit Offender Data screen.
- Z - Notifications** - log of people to notify regarding offender.
- E - Emergency Notifications** - whom to notify in case of offender emergency.
- O – W/W Offender Caseload History** - list of prior caseloads offender has belonged to.
- K – W/W Earned Time – All Cycles** –
- L – W/W Offender Class History** –
- W – Inmate Schedule Calendar** –
- Q – Oregon Corrections Plan** -

# CHAPTER 28.0

## USING CIS WEB SERVE

Using Option 5 CIS-Web-Serve to access DOC Website Communities like LS-CMI, ICOTS, CMIS, etc.

### Section 28.1 - To Access

Select Offender Information from the Main ISIS Menu, either by letter if pre-loaded, or by number from menu. This option is available from other screens as well.

1. Press <F11> **Menu Bar**, <5> **Cis\_Web\_Serve** to display the Websites that are available through CIS

2. The websites available are:

- A – OIS** – Oregon Corrections Information System
- B – CMIS** – Corrections Management Information System
- F – WebLEDS** - Law Enforcement Data System
- J – LSCMI** – Level of Service/Case Management Inventory
- K – ICOTS** – Interstate Compact Offender Tracking Sytem

5 Active_Jobs	WS_Options	Process_Step	Info_Windows	Cis_Web_Serve
			Cis Web Windows	:
Offender..	:		A Open OIS Community	:
Location..			C Open CMIS Community	:
			F Open Web Leds Community	:
Age 23	DOB	DNA C	J Open LSCMI Community	:
Sex	Race WHITE	Field	K Open ICOTS	:
Height 6'	Hair BROWN	Maxim		:
Weight 215lbs	Eyes BROWN			:
				:
Caseload	(MTSW)			:
Supervision	MED			Bottom :
Court Case	Cnty ORS Abbrev Cls Type Begi	:.....:		
	CLAC RAPE I AT BF POST		000-102-026	
				Bottom
F3=Exit	F4=Prompt	F5=Refresh	F6=PTA Caseload	F9=Retrieve
F11=Menu bar	F12=Cancel	F17=All offenses		

## **CHAPTER 29.0**

### **Other Reference Manuals**

CIS Reports Manual – via website  
CMIS Manual – via website  
Condition Tracking Manual  
LS/CMI Manual – via website  
PO Manual  
Structured Sanctions Manual

# CHAPTER 30.0

## Table of Contents/Index

<b>1.0 – HOW TO USE THIS GUIDE .....</b>	<b>2</b>
<b>Section 1.1</b>	
Local Resources	
Help Desk Phone Number & E-mail address	
Methods of Navigation	
Function Keys	
Golden Rule – Read the Screen	
<b>2.0 – USE THE MENU BAR TO MOVE TO OTHER PARTS OF CIS/ISIS .....</b>	<b>3</b>
<b>Section 2.1</b>	
Menu Bar	
Active Jobs	
WS Options	
Process Steps	
Info Windows	
<b>3.0 – GET HELP, USE CREATE OR CHANGE MODES, OR THE AUDIT STAMP.....</b>	<b>4-5</b>
<b>3.1 - F1 =Help</b>	
Help Desk, needed information for ticket entry	
<b>3.2 - F2=Audit Stamp</b>	
<b>3.3 - Create &amp; Change Modes</b>	
<b>3.4 - Retrieve an Offender Name</b>	
<b>3.5 - Use Defaults</b>	
<b>3.6 - Accessing Other Menus</b>	
<b>4.0 – USE W/W CASELOAD &amp; OPTION &lt;2&gt; TO ENTER CHRONOS .....</b>	<b>6-8</b>
<b>4.1 - Updating Employment Status</b>	
<b>4.2 - Chrono Header</b>	
<b>4.3 - Text Field</b>	
<b>4.4 - Menu Bar – Info Windows</b>	
<b>4.5 - Chrono Entry</b>	
<b>4.6 - Flashing Indicators</b>	
<b>5.0 – ISIS KEYWORDS LIST .....</b>	<b>9</b>
<b>6.0 – Change Chrono History.....</b>	<b>10-12</b>
<b>6.1 – Got to Chrono History</b>	
<b>6.2 - Edit Chronos</b>	
Option <2>=Change	
F20=History	
F4=Prompt	
F5=Refresh	
F10=Print	
F11=Menu Bar	
F13=Roll Change	

F14=Find Options  
F16=Find  
F20=Modify  
F21=Append  
F22=Delete

<b>PLEASE NOTE for Chapters 7.0-11.0.....</b>	<b>12</b>
<b>7.0 - ENTER ADDRESSES.....</b>	<b>13</b>
F6=Add	
F15=Mailing Address	
F10=Print	
<b>8.0 – ENTER TREATMENT UPDATES .....</b>	<b>14-15</b>
F6=Add	
F4=Prompt	
F10=Print	
<b>9.0 – ENTER UA TESTS.....</b>	<b>16-17</b>
F6=Add	
F10=Print	
<b>10.0 - ENTER ALIASES, MONIKERS, OR VIEW INSTITUTION PROGRAMS.....</b>	<b>18-19</b>
F6=Add	
F10=Print	
F16=View History	
<b>11.0 – TRACK SUPERVISION CONDITIONS.....</b>	<b>20-22</b>
<b>11.1 - Special Condition Codes</b>	
<b>11.2 - General Condition Codes</b>	
<b>11.3 - T/L Condition Codes</b>	
<b>12.0 – ACCESSING W/W TREATMENT AND SELECTING AND VIEWING PROGRAM INFORMATION AND MONITORING TREATMENT STATUS .....</b>	<b>23-27</b>
<b>Section 12.1</b>	
Option 5=Display	
Option 12=Work with Assignments	
F17=Subset	
<b>12.2 - Subset Criteria</b>	
<b>12.3 - County/Place Codes</b>	
<b>12.4 - Treatment Types</b>	
Completion Codes	
<b>13.0 – TO ACCESS ANOTHER OFFICERS CASELOAD WITHIN YOUR OWN OFFICE.....</b>	<b>28</b>
F12=Cancel	
F4=Prompt	
F6=Use as Default Caseload	

<b>14.0 – TO ADD/REMOVE SECONDARY OFFENDERS FROM A CASELOAD .....</b>	<b>29-31</b>
14.1 – Primary and Secondary	
14.2 – F6=Add Offender	
F4=Prompt	
14.3 – Option <4>=Remove from Caseload	
14.4 – Identify primary and secondary offenders on caseload	
F17=Subset	
Option <21>=Caseloads	
F7=Staff	
<b>15.0 – SUBSET CASELOAD OR TREATMENT PROGRAM .....</b>	<b>32-33</b>
15.1 – Subset	
15.2 – To Subset Caseload	
15.3 – To Subset Treatment	
15.4 – *Asterisk use	
15.5 – Subset Criteria	
15.6 – Offender Status Codes	
15.7 – Outcount Selection Codes	
<b>16.0 – TO LOCATE ANY OFFENDER USING THE ALL NAMES WINDOW.....</b>	<b>34</b>
16.1 – F12=Cancel	
16.2 – F4=Prompt	
16.3 – F16=View Description	
<b>17.0 – ADD OFFENDER NOTE.....</b>	<b>35-36</b>
17.1 – F11-2-N	
F4=Prompt	
Add Mode	
Change Mode	
17.2 – Notification of Note Delivery	
17.3 – To Read an Offender Note	
F21=Offender Note Display	
F6=Create	
F7=Previous Note	
F13=Change	
F14=Delete	
F15=Move to Chrono	
F12=Cancel	
F3=Exit	
<b>18.0 – OPTION 23/24 MERGE DOCUMENTS TO WRITE REPORTS.....</b>	<b>37</b>
18.1 – Merge Documents	
18.2 – Individual Notes on Option 23/24 documents	
18.3 - Notes	
<b>19.0 – STRUCTURED SANCTION/MORRISSEY PACKAGE.....</b>	<b>38-39</b>
19.1 – Option <19>=Select an Offender	
F7=Create a sanction	

<b>20.0 – STRUCTURED SANCTIONS AND MOVEMENT HISTORY.....</b>	<b>40-41</b>
<b>20.1 – Sanction Movement tracking</b>	
Enter=Add Movement	
Option <2>=Update a movement	
<b>21.0 – USE THE TO-DO LIST TO MANAGE MY CASELOAD .....</b>	<b>42-44</b>
<b>21.1 – Access To-Do List</b>	
F9=Retrieve	
F6=Add Task	
Option <12>=Completed	
Option <13>=Reopen	
Option <2>=Change	
Option <3>=Copy	
Option <11>=Move	
Option <15>=Process	
<b>21.2 – Effects of Using Past, Present and future selection dates</b>	
F10=Print	
<b>22.0 – USE GENERATED ENTRIES TO TRACK OFFENDER CONTACTS AND TREATMENT STATUS, TO HELP MANAGE CASELOAD.....</b>	<b>45-46</b>
<b>22.1 - F14=Generate entries</b>	
F15=Remove generated entries	
F16=Exclude Completed entries	
<b>22.2 - Specific Generated Entry selections include</b>	
Significant Contacts	
Risk Reassessment	
Treatment Referrals made prior to	
Treatment Completion due	
Office visits due	
Home visits due	
<b>23.0 – PO SPECIAL REPORT PROCESS .....</b>	<b>47</b>
<b>23.1 – Special Reports</b>	
<b>23.2 - Screen format</b>	
<b>23.3 - Default settings</b>	
<b>24.0 – RELEASE PLANNING W/W RELEASE PLANS TO COMPLETE A FIELD INVESTIGATION.....</b>	<b>48-50</b>
<b>24.1 - W/W Release Plans</b>	
By Location	
By Caseload	
By Offender	
<b>24.2 - Create new release plan</b>	
<b>24.3 - Edit release plan</b>	
General Information screen	
Community Information screen	
Institution Information screen	
Parole Board Information screen	
W/W Offences, County Inmate Movement, Sex Offender Assessments, Chrono	

<b>24.4 - Send plan</b>	
Complete LC	
<b>25.0 – SUPERVISOR’S REVIEW WARRANTS .....</b>	<b>51-52</b>
<b>25.1 – Supervisor’s Review SRF</b>	
Option <5>=Review warrant or SRF	
Option <15>=To return and approve warrant	
Option <18>=To review HO text in SRF	
Option <2>=Change SRF	
Option <16>=set sanction to complete	
Option <15>=to send back to PO	
<b>26.0 – WARRANTS.....</b>	<b>53-54</b>
<b>26.1 – “Go To”</b>	
<b>26.2 - Parole Board</b>	
<b>26.3 - Probation</b>	
<b>26.4 - Local Control</b>	
<b>27.0 – USING OFFENDER PUBLIC INFORMATION.....</b>	<b>55-56</b>
<b>27.1 - To Access</b>	
F4=Prompt	
F16=View Description	
F11=Menu Bar	
Available Info Windows	
<b>28.0 – USING CIS WEB SERVE .....</b>	<b>57</b>
<b>28.1 – To Access</b>	
<b>29.0 – OTHER REFERENCE MANUALS .....</b>	<b>58</b>
<b>30.0 – Table of Contents/INDEX.....</b>	<b>59-63</b>