

SCALES

(Specialty Court Application & Legal Exchange System)

USER GUIDE

Updated September 2022

Table of Contents

Application Access	4
Application Navigation	5
Home Dashboard	6
Applicants	12
Applicants Dashboard	13
Refer an Individual	13
New Application	16
Party Information	16
Referring Cases	19
Assessments	19
RANT by Public Health Management Corporation (PHMC)	20
Other Assessments	27
Substance Use	28
Additional Notes	29
Court Type	32
Team Decision	32
Accept Applicant	33
Sentencing Notes Example	33
Edit PENDING Application	34
Reject Application	35
Reset a REJECTED application to PENDING status	36
Case Management	39
Manage Phase	40

Manage Status	41
Close a case	43
To TERMINATE a case	44
Docket Notes	49
Supervision Notes	51
Drug Test	53
View Drug Test Results	58
Edit Case History Notes	60
Review Hearing Staffing Report	62
Treatment Summary	64
Overview	64
Create a NEW Treatment Provider Assessment – TREATMENT PROVIDERS only	69
To save and edit a TREATMENT SUMMARY	73
Automatic Updates to Case History	74
View Treatment Summary History	74
Case History	Error! Bookmark not defined.
Application Settings	85
Drug Panels	85
Manage Drug Panels	89
Manage Treatment Providers and Vendors	91
To edit or delete a Treatment Provider	92
Transfer Participants	76
Evaluations	70

Application Access

SCALES is a web-based application that is compatible with multiple browsers. SCALES is not compatible with Internet Explorer.

To access SCALES, a request must be submitted to specialtycourts@arcourts.gov. Once access has been established, new users will receive the link to the SCALES login page, username, and password.

To login, enter USERNAME and PASSWORD then click Log In.

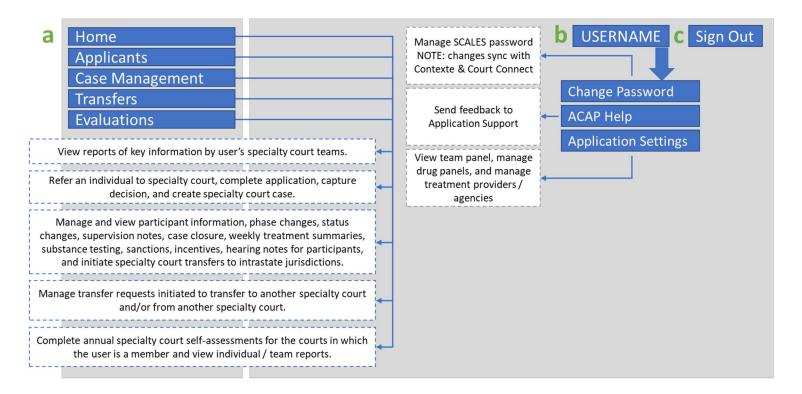


NOTE: Users may follow the Forgot Password link to reset password. SCALES credentials are synced with other court applications.

Application Navigation

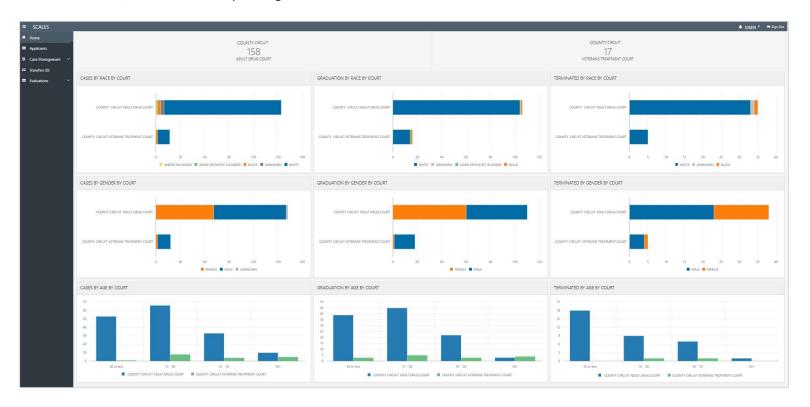
Below is a quick overview of how to navigate within the application.

- a. A navigation bar resides on the left side of the application.
- b. Application information and admin details may be accessed from the drop-down menu next to the username.
- c. User may securely exit the application by clicking Sign Out in the top right of the application.



Home Dashboard

Upon login, users are navigated to the Home Dashboard which displays a snapshot of key information for each Specialty Court to which the user is a team member, based on security settings.

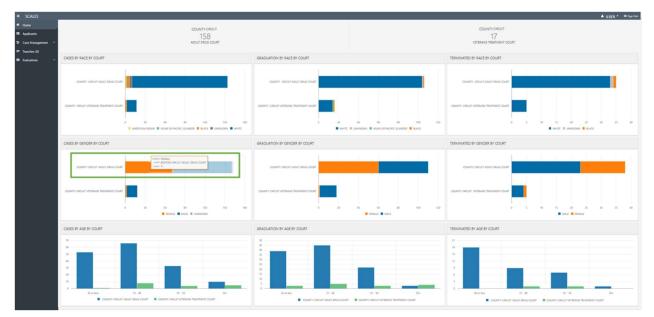


Each report is broken out by the Specialty Courts for which the user is a team member. Access to courts is controlled at the account security level. In this example, the user has access to two courts: County Adult Drug Court and County Veterans Treatment Court.



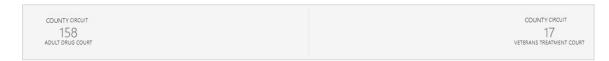
Users may hover over measures in the dashboard to view details.

7



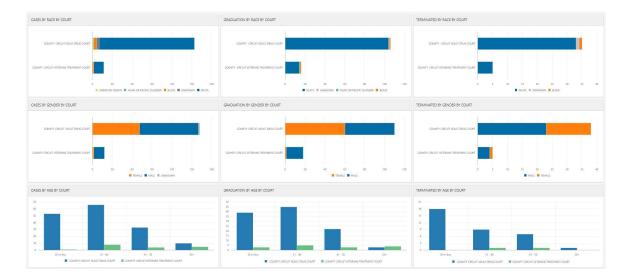
Active Cases

Within the dashboard, the top report displays the sum of active cases by county, location, and case type. Active cases are accepted specialty court cases where the participant's PHASE is not set to GRADUATED, TERMINATED, OR TRANSFERRED.



Equity and Inclusion

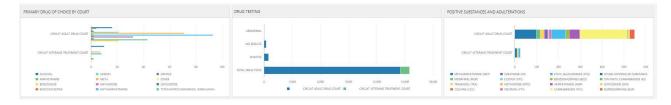
The next three sections report on participant demographics, RACE, GENDER, and AGE, for active cases, graduations, and terminations by county, location, and case type.



Substances

The next section focuses on substances. The first chart reports on Primary Drug of Choice as captured in the participant's application by county, location, and case type. The middle chart reports on Drug Testing by county, location, and case type. The last chart reports on Positive Substances and Adulterations.

9

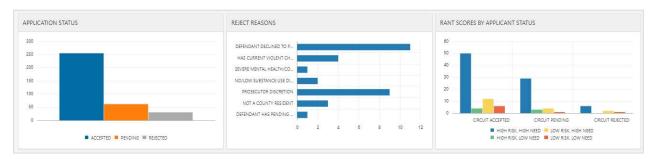


Rules for counting result types in the DRUG TESTING report:

Drug Test Report		
NO RESULTS	# of entries where RESULT equals N/A, REFUSED TEST, or NO SHOW	
ABNORMAL	# of entries where at least one RESULT = 'ABNORMAL'	
	# of entries where at least one RESULT = 'POSITIVE'	
POSITIVE	(NOTE: POSITIVE BUT WITH PRESCRIPTION is not counted here)	
TOTAL TESTS	# of entries regardless of RESULT	

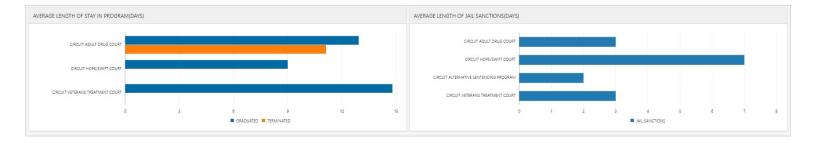
Applications

This section reports on total applications by status, reject reasons for rejected applications, and RANT score by status.



Averages

The last section reports on average length of stay in program and the average length of jail sanctions. The average length of stay in program for graduated and terminated cases is calculated based on the number of days from the first hearing date to the date of graduation/termination. The average length of jail sanctions is based on sanction selections across all cases.



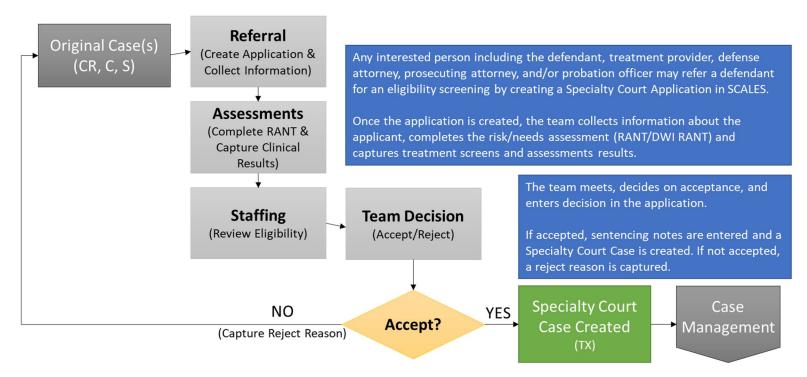
Summary of Home Dashboard Reports

DASHBOARD REPORT	DESCRIPTION
ACTIVE CASES BY COURT	active cases (phase not GRADUATED, TERMINATED, or TRANSFERRED) by county/location/case type
CASES BY RACE BY COURT	race of active cases (phase not GRADUATED, TERMINATED, or TRANSFERRED) by county/location/case type
GRADUATES BY RACE BY COURT	race of graduated cases by county/location/case type

TERMINATIONS BY RACE BY COURT	race of terminated cases by county/location/case type		
CASES BY GENDER BY COURT	gender of active cases (phase not GRADUATED, TERMINATED, or TRANSFERRED) by county/location/case type		
GRADUATES BY GENDER BY COURT	gender of graduated by county/location/case type		
TERMINATIONS BY GENDER BY COURT	gender of terminated by county/location/case type		
CASES BY AGE BY COURT	age of active cases (phase not GRADUATED, TERMINATED, or TRANSFERRED) by county/location/case type		
GRADUATES BY AGE BY COURT	age of graduated by county/location/case type		
TERMINATIONS BY AGE BY COURT	age of terminated by county/location/case type		
PRIMARY DRUG OF CHOICE BY COURT	primary drug(s) of choice at time of application by county/location/case type		
DRUG TESTING	drug tests completed by county/location/case type		
POSITIVE SUBSTANCES AND ADULTERATIONS	positive substances and adulterations by county/location/case type		
APPLICATION STATUS	application status by county/location		
REJECT REASONS	reject reasons by county/location for rejected applicants		
RANT SCORES BY APPLICANT STATUS	rant scores by county/location for all applicants		
RANT SCORES BY GRADUATION	rant scores by county/location/case type for graduates only		
AVERAGE LENGTH OF STAY IN PROGRAM (DAYS)	average number of days in program by terms/grads by county/location/case type		
AVERAGE LENGTH OF JAIL SACTIONS (DAYS)	average length of jail sanctions by days by county/location/case type		

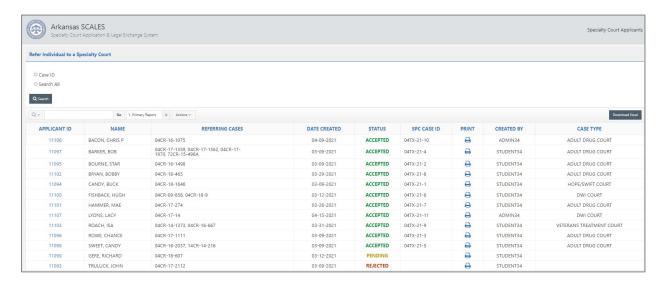
Applicants

The Applicants dashboard allows users to create and manage referrals. Specifically, users may refer individuals to a specialty court, administer a RANT/DWI RANT assessment, capture and review data to determine eligibility, capture decision, and create specialty court cases.



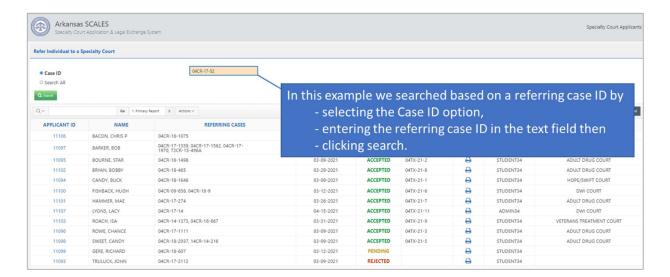
Applicants Dashboard

The Applicants dashboard has two sections. The top section is where users refer and individual to a specialty court. The bottom section is a report of all applications submitted to the specialty court(s) in which the user is a team member.

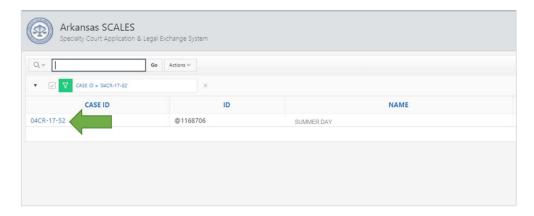


Refer an Individual

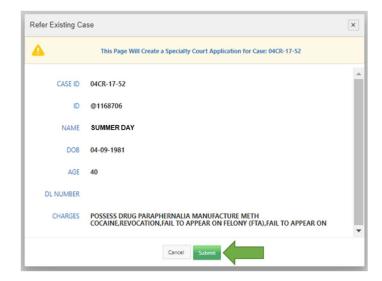
To refer an individual to a specialty court, users may search by a referring case ID or search all criminal/traffic cases within the last 8 years (based on user security).



The court database is searched, and the matching results displayed. Click the CASE ID (blue link) to initiate the referral.



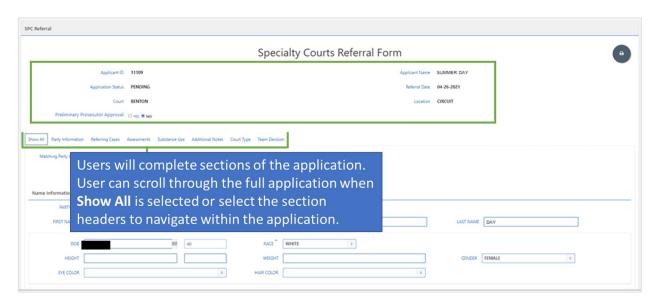
A Refer Existing Case page opens with details from the selected case and defendant to confirm user intends to create a new application from referring case.



To create the application, select **Submit**.

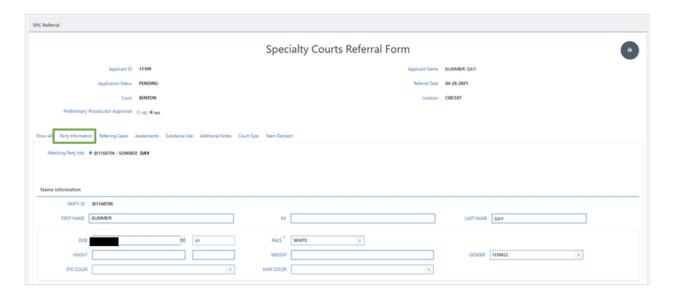
New Application

The newly created application will open with *unique* Applicant ID, PENDING Application Status, Referral Date defaulted to current date, and Court and Location set based on the referring case, and Preliminary Prosecutor Approval set to NO.

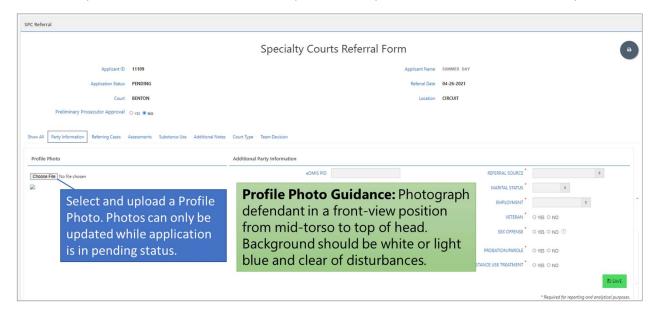


Party Information

The Party Information section is pre-populated with information from the court database, such as name, demographic information, and address. The pre-populated data is not editable as it is a snapshot of the case and party information in the court database related to the referring case.



Within Party Information, a Profile Photo is required to be uploaded before RANT can be completed and a decision can be captured.



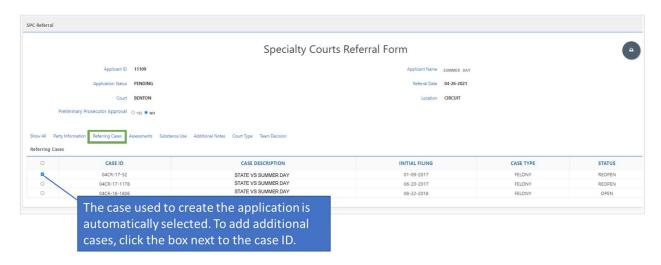
Within Party Information, Additional Party Information is required to be completed before RANT may be completed or a decision captured.



NOTE: When PROBATION/PAROLE is YES, the eOMIS PID value is required.

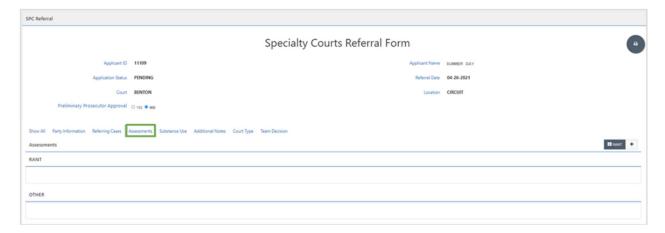
Referring Cases

The Referring Cases section displays criminal cases where the applicant is a defendant so that other cases may be selected as referring cases.



Assessments

The Assessments section captures all assessments and/or screening tools completed on the applicant to facilitate team decision.



RANT by Public Health Management Corporation (PHMC)

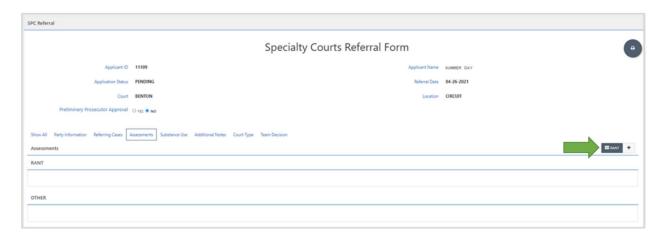
A RANT or DWI RANT assessment is required to be completed for each applicant to identify eligibility based on risk and need.

The RANT/DWI RANT, by Public Health Management Corporation, PHMC, is built into SCALES. Users complete the assessment (19 questions for RANT and 23 for DWI RANT) then submit for scoring. A score from one of the following four quadrants is returned.

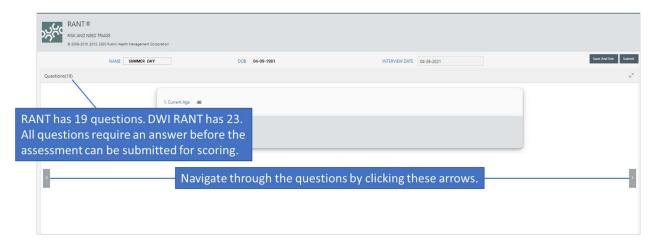
Risk and Needs Triage Quadrants Adult Drug Court **Probation Supervision Veterans Treatment Court** With Intensive Drug Mental Health Court Treatment **DWI Court** High Risk Low Risk High Need RANT - 19 questions; DWI-RANT - 23 questions High Risk Low Risk Low Need Low Need Alternative **HOPE / SWIFT Court** Sentencing Program Source: Treatment Research Institute RANT* tool

The best target audience for each specialty court type is noted.

Click RANT (or DWI RANT for DWI court) to open the assessment.

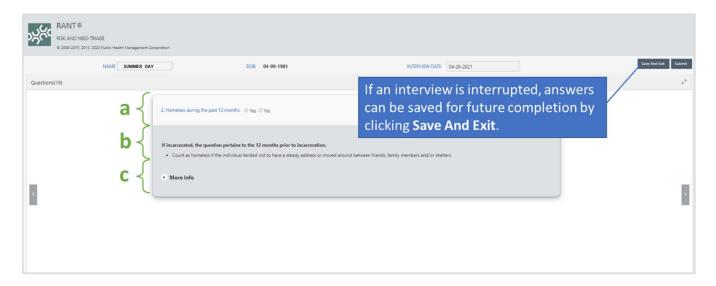


Once opened, the applicant's name and DOB displays at the top. Interview Date defaults to the current date but can be backdated if paper interview was given on an earlier date.



Each question has three parts:

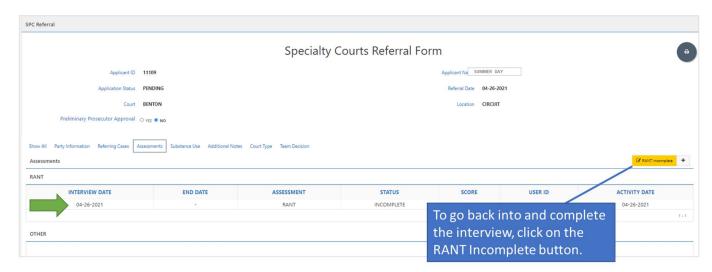
- a Question with answer format
- b Coding Rules to guide interviewer to capture the most accurate answers
- c More Info section with details on how this question informs results



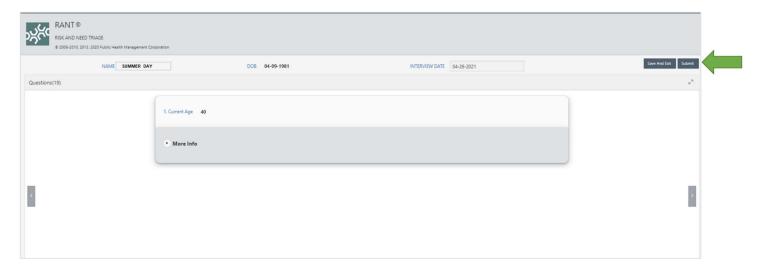
Data validation rules run each time the Save and Exit or Submit option is clicked. If there are invalid responses based on data rules, a banner alerting those errors is displayed at the top. User may click through the links to be taken to the question with invalid data.



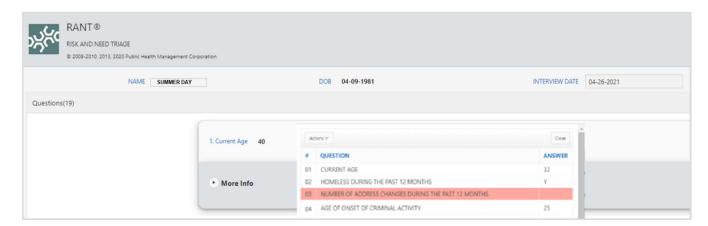
Once data has been corrected and user selects Save and Exit, user is returned to the application. A row is added to the RANT/DWI RANT report with details of the incomplete assessment.



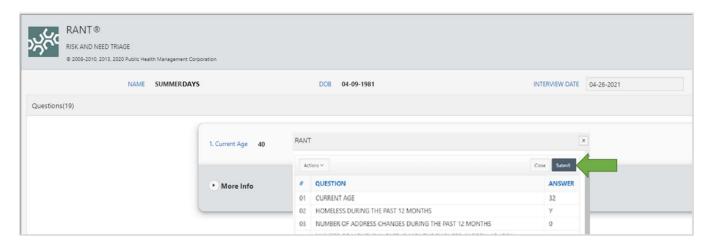
When all answers are entered, click Submit.



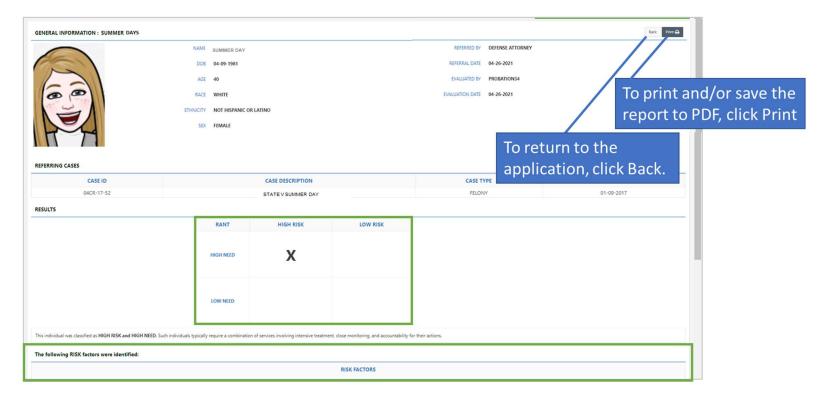
An answer review page will pop up. The assessment cannot be submitted for scoring if any of the answers contain invalid data and/or are blank. Questions with problematic and/or missing data are highlighted. Close the review page, correct errors, then click Submit.



If all questions have valid responses, the Submit button will be displayed. Click to run the RANT algorithm.



A RANT report will be displayed with the score results and any risk and/or need factors identified.

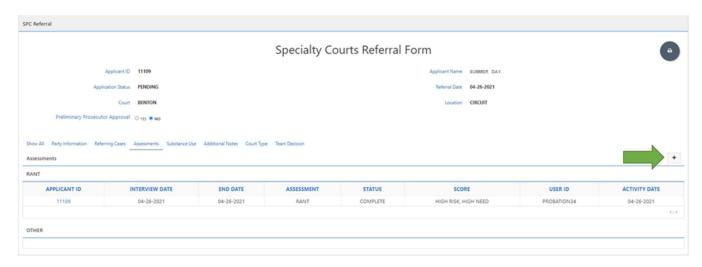


Within the application assessments section, the summary row is updated with details including the score. The RANT/DWI RANT report is stored within the application and can be accessed at any time by clicking the APPLICANT ID link to the left of the assessment.

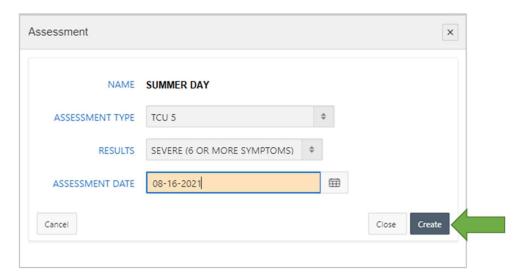


Other Assessments

Additionally, at least one clinical assessment (TCU5, ASI SEVERITY, etc.) is required for each applicant. The results from all additional risk/needs assessments (ARORA, CARS, ORAS) also need to be captured. To capture these results, Click + in the Assessments Section of the application.



Complete the page then click Create to capture required details for each assessment.



Results from all other assessments entered display in the OTHER section of Assessments.

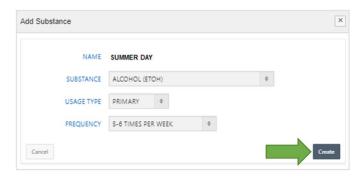


Substance Use

At least one Primary substance is required for each Adult Drug Court and DWI Court applicant. Click + in the Substance Use Section of the application to add a primary and/or secondary substance.



Complete the modal page and click Create to add required details for each substance used by applicant.



A summary row for each substance entered is added to the application.



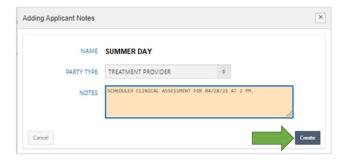
NOTE: All primary and/or secondary substances need to be captured in the application.

Additional Notes

Additional notes are optional and meant to allow the team a place to communicate and collaborate. Click + in the Additional Notes Section of the application to add a note



Complete the modal page, then click Create to add note.



The note will be displayed in the Additional Notes section for all team members to see.



Additional Notes Examples:

- Coordinator: Defendant is scheduled to observe program on 01/10/22. Status review hearing to follow.
- Probation Officer: Defendant is scheduled for risk/need assessment on 01/13/22.

-	Coordinator: Defendant provided proof of quarantine	e from 01/12/22 -	– 01/22/22. Assessments n	eed to be rescheduled.
	SCALES User Guide	31		Last Updated October 2022

Court Type

A Court Type must be selected prior to capturing team decision.



Team Decision

Once all required data has been captured in the application, staffing meeting has been held, a decision has been made, and the hearing has been held, the decision may be captured. Click the decision button in the Team Decision section of the application.

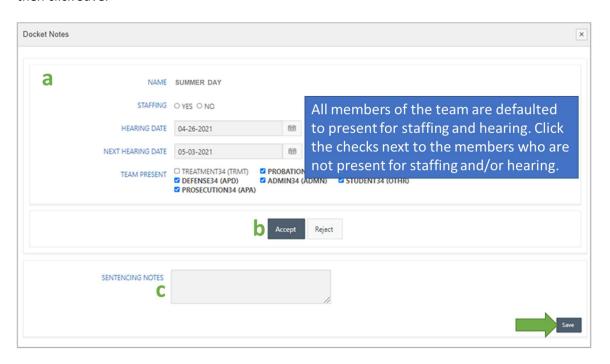


Accept Applicant

If the applicant is accepted into Specialty Court,

- a. Complete the Docket Notes modal page information
- b. Select Accept
- c. Enter sentencing notes

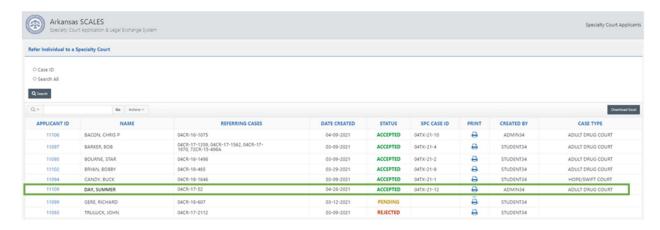
then click Save.



Sentencing Notes Example

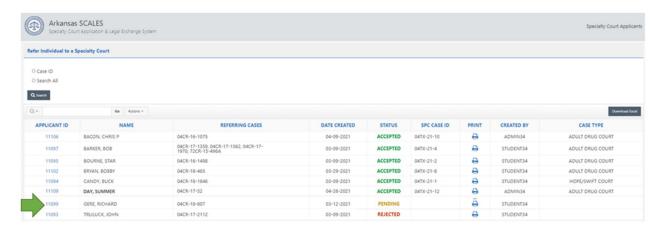
On August 1, 2021, defendant, Summer Day, was sentenced to 16 months probation for Possession of Controlled Substance (Felony-C). Day was ordered to pay \$500 fines, \$250 DNA testing fee, \$20 booking fee, \$150 court costs, \$125 drug crime fee, and \$150 public defender fee. Day was ordered to complete Drug Court.

Once decision is captured, user is returned to the Applicants dashboard. Banner message will confirm applicant decision was captured. Application STATUS is updated with decision, in this example ACCEPTED. Once accepted, a Specialty Court Case (TX) is created, in this example 04TX-21-1. The accepted case will also be available in the Case Management dashboard.



Edit PENDING Application

To access applicant data regardless of status, click APPLICANT ID link. Those still in PENDING status can be edited by all team members until a decision is captured.

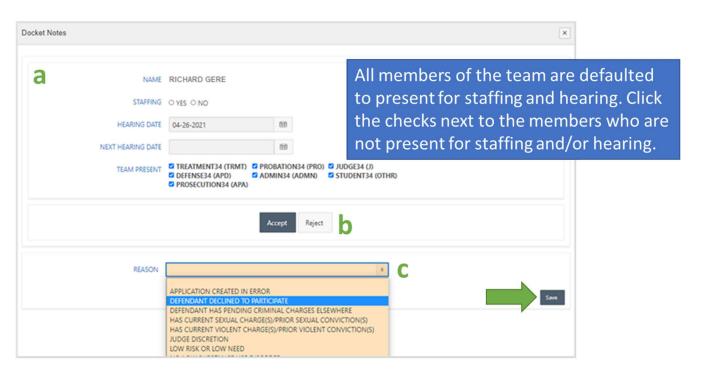


Reject Application

If the applicant was not accepted into a Specialty Court, after clicking the decision button within the application,

- a. Complete the Docket Notes information section
- b. Select Reject
- c. Select the reject reason from the drop-down box

then click Save.



NOTE: Team members listed for TEAM PRESENT are read from the SPC Team Panel settings. If changes need to be made to the team, please contact acap.help@arcourts.gov.

Once Save is selected, the application status will be set to REJECTED on the Applicants Dashboard report.

Reset a REJECTED application to PENDING status

Users may reset a previously rejected application to PENDING status. From the Applicants dashboard, click the APPLICANT ID to open the application.

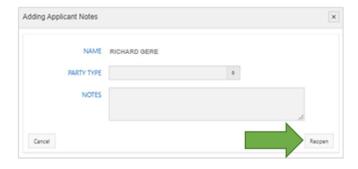
Click Team Decision.



Click Reopen.



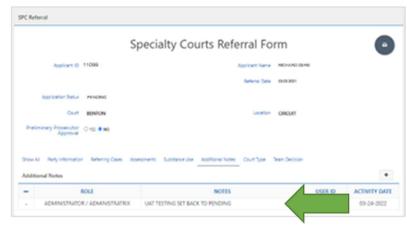
Select the PARTY TYPE requesting the change, add NOTES, then click Reopen.



Applicant's status will be reset to PENDING, a note (Applicant Reopened on MM-DD-YYYY) will be added to the application row on the Applicants dashboard.



The text typed into the NOTES box will be added to the Additional Notes section in the application.

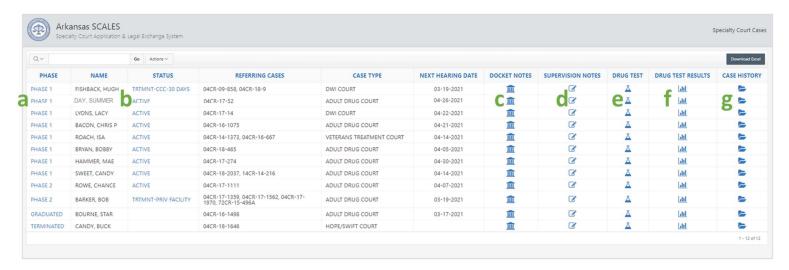


Case Management

Once an application is accepted, a Specialty Court Case (TX) is created and viewable in Case Management.

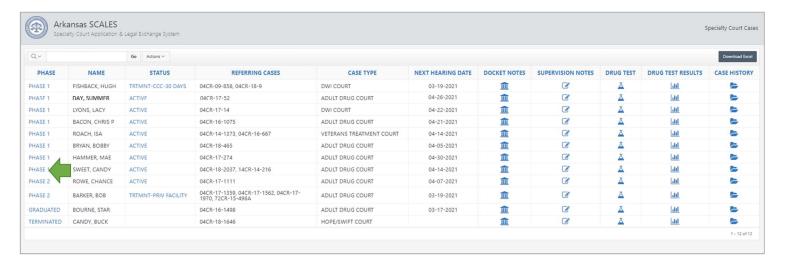
The Case Management Dashboard displays all accepted participants and allows users to:

- a. update phase
- b. update status
- c. capture review hearing docket notes
- d. add supervision and treatment notes
- e. enter drug test results
- f. view drug test results
- g. view a comprehensive case history for each participant.

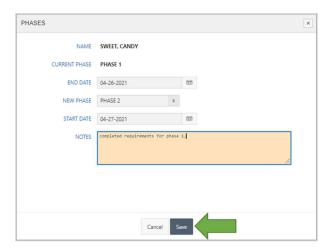


Manage Phase

To change PHASE, click the blue link next to the participant.



Complete the PHASE page and click Save.

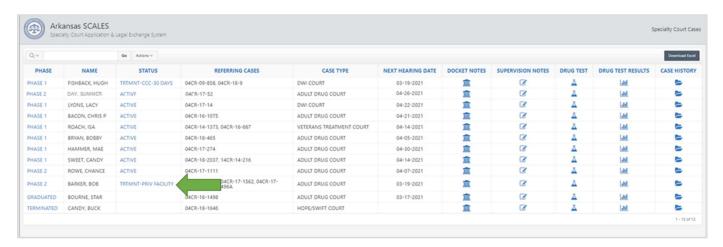


NOTE: START DATE of the NEW PHASE defaults to one day after END DATE.

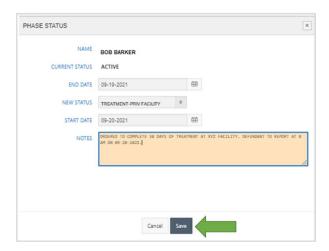
Once saved, phase is updated on the Case Management dashboard. It is also updated in the Case History header and a PHASE NOTE is added to Case History. The note format is "MOVED TO <NEW PHASE> — " concatenated with the text from NOTES on the PHASES update page.

Manage Status

To change STATUS, click the blue link in the STATUS column for the participant.



Complete the PHASE STATUS page and click Save.



NOTE: START DATE of the NEW STATUS defaults to one day after END DATE.

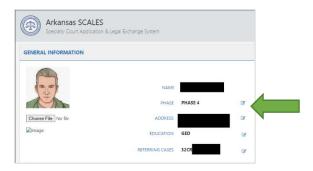
Once saved, status is updated on the Case Management dashboard. It is also updated in the Case History header and a STATUS NOTE is added to Case History. The note format is "ENTERED <NEW STATUS> — " concatenated with the text from NOTES on the PHASE STATUS update page.

Close a case

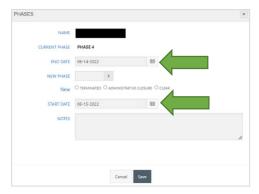
For all case closure reasons, from the Case Management dashboard, click the blue link for PHASE next to the case that is to be closed.



Optionally, from within Case History for the case that is to be closed, click the edit icon next to phase in the header.

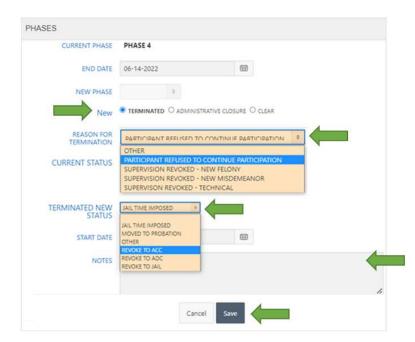


With either option, a PHASES page will open. Select the END DATE for the current phase. The START DATE for the new phase/closure will default to the following day. The remaining steps depend on the type of closure as follows:



To TERMINATE a case

- Select the TERMINATED button below the NEW PHASE drop down
- Select a REASON FOR TERMINATION
- Select the TERMINATED NEW STATUS
- Enter notes
- Click Save

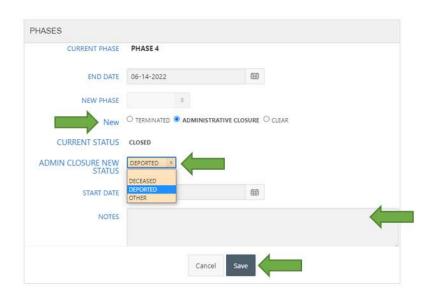


The PHASE and STATUS will be updated to reflect the termination.

PHASE	NAME	STATUS
TERMINATED		JAIL TIME IMPOSED

To reflect an ADMINISTRATIVE CLOSURE of the case

- Select the ADMINISTRATIVE CLOSURE button below the NEW PHASE drop down
- Select the TERMINATED NEW STATUS
- Enter notes
- Click Save

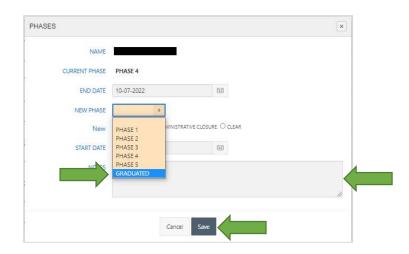


The PHASE and STATUS will be updated to reflect the administrative closure.



To reflect a GRADUATION

- Select GRADUATED from the NEW PHASE drop-down menu
- START DATE will default to one day after END DATE
- Enter notes
- Click save

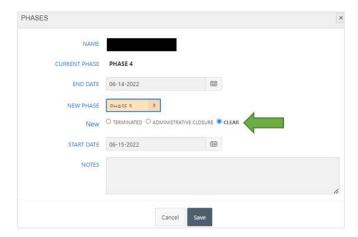


The PHASE and STATUS will be updated to reflect the graduation.



If TERMINATION or ADMINISTRATIVE CLOSURE option is selected by mistake

• Select the CLEAR button, select the appropriate PHASE from the drop down, and complete the form as usual.



48

Docket Notes

To enter hearing notes, select the DOCKET NOTES icon for the participant.



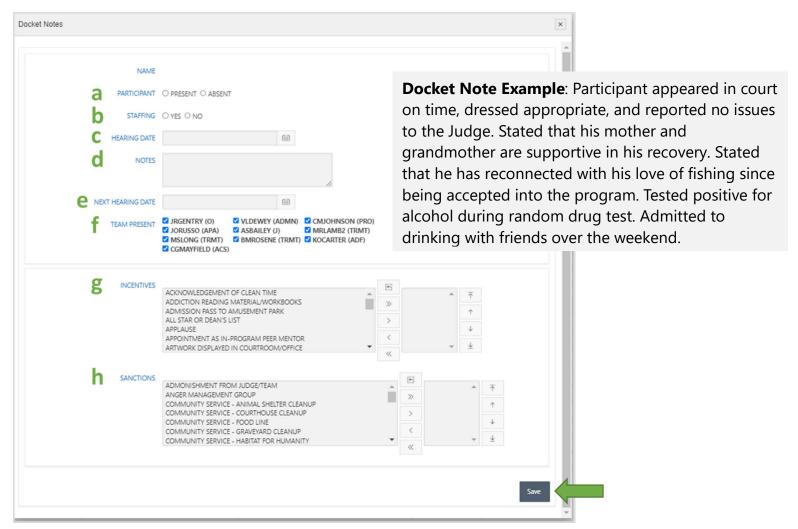
Optionally, docket notes may be accessed from within case history by selecting the DOCKET NOTES icon.



A Docket Notes page will open. Capture the following data points on the page, then click Save.

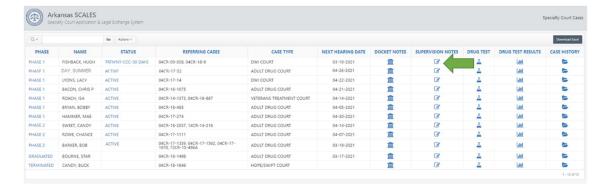
- a. Select whether the PARTICIPANT was present or absent
- b. Select whether the team completed a STAFFING discussion prior to the hearing
- c. Enter the HEARING DATE for which the note relates
- d. Enter Docket Notes (example below).
- e. When is the participant's NEXT HEARING DATE?
- f. Click the check in front of the username for team members not present at staffing or hearing to accurately capture TEAM PRESENT.
- g. Add all INCENTIVES by double-clicking from the box on the left so they appear in the box on the right.
- h. Add all SANCTIONS by double-clicking from the box on the left so they appear in the box on the right.

50



Supervision Notes

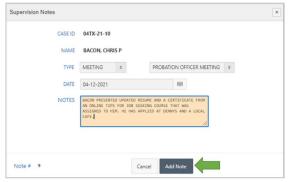
To enter supervision notes, click the SUPERVISION NOTES icon for the participant.



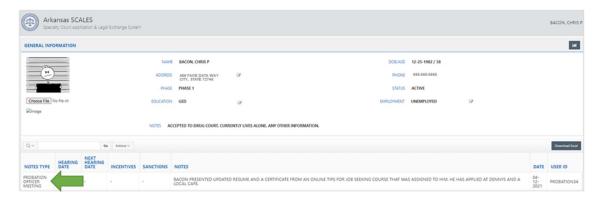
Optionally, user may enter supervision notes from case history by clicking the SUPERVISION NOTES icon.



Complete the Supervision Notes page then click Add Note.



Supervision notes are written to Case History.



NOTE: Below is a list of supervision note types and subtypes that may be captured:

CONTACT

DETENTION CONTACT
HOME CONTACT
OFFICE CONTACT
PHONE CONTACT
SCHOOL CONTACT
OTHER CONTACT

MEETING

PROBATION OFFICER MEETING SUPPORT GROUP MEETING TEAM MEETING

NOTE

MEMO

Drug Test

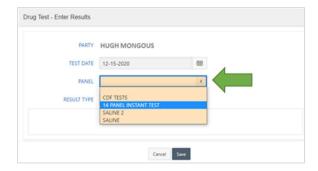
To enter drug test results, click the DRUG TEST icon for the participant.



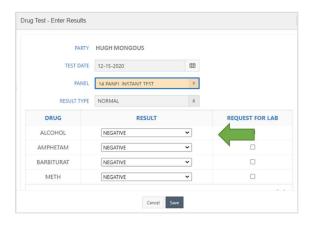
Optionally the user may enter drug tests from within case history by clicking the DRUG TEST icon.



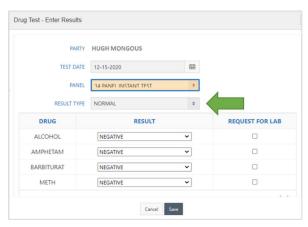
Select the actual TEST DATE (can be backdated), select the PANEL (this will display the panels setup in Application Settings).



Drug panels listed in the drop-down are read from the Drug Panel settings. The substances added to that panel will display on the page.



The RESULT TYPE defaults to NORMAL.



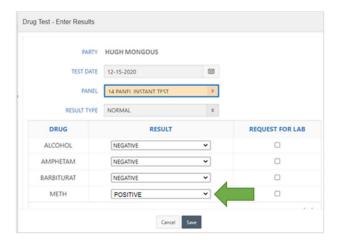
Types of test results and how to capture:

- a. If the drug test was performed as normal with no positive results, click Save to capture results.
- b. If the drug test was performed as normal with positive results, from the drop down next to the substance with positive results, select POSITIVE, select the REQUEST FOR LAB box if the defendant requests to have the results sent in for confirmation. Do this for ALL substances with positive results then click Save to capture results.
- c. If the participant refused to test, from the PANEL menu, select REFUSED TEST then click Save to capture results.
- d. If the participant failed to produce, from the PANEL menu, select FAILED TO PRODUCE then click Save to capture results.
- e. If the participant is excused and/or has a medical reason for missing the test, from the PANEL menu, select EXCUSED/MEDICAL

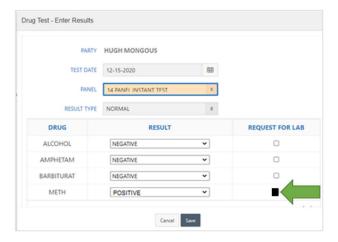
NOTE: Currently only one drug test can be captured per day.

Add POSITIVE or ABNORMAL results

Select the drop-down box for the substance that came back POSITIVE or ABNORMAL and select that value.



If participant requests a confirmation of results, click the box next to the substance in the REQUEST FOR LAB column.

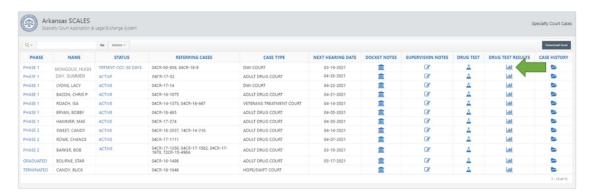


Once all data has been updated on the Drug Test page, click Save. Results are written to the DRUG TEST RESULTS report.

Drug Test Results

View drug test results

Click the DRUG TEST RESULTS icon for the participant to view drug test results.



Optionally, drug test results may be viewed from within case history by clicking the DRUG TEST RESULTS icon.



To view detailed results for a specific test, click the down arrow next to the date.

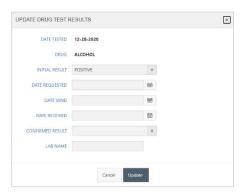


Update drug test confirmation results

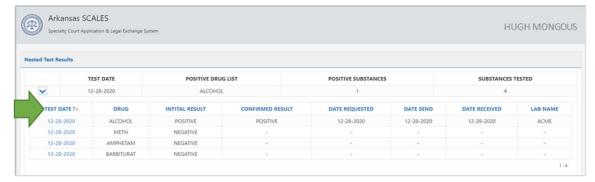
To update drug test results with lab confirmation information, click the date next to the substance.



Complete the form (all fields are required) then click Update.

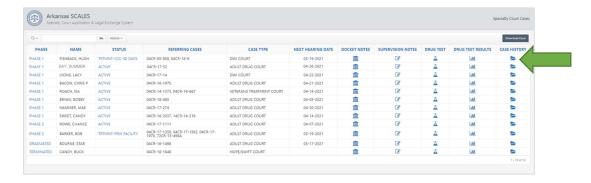


Updated information can be viewed from the detailed report. Repeat the previous steps for each substance with confirmed results.

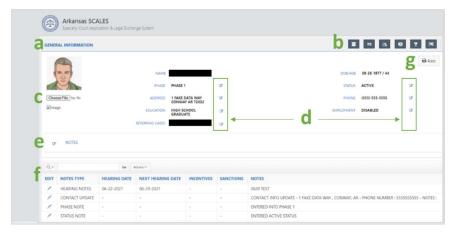


Case History

Case history is a comprehensive view of the participant while in the program. To view case history for a participant, click the CASE HISTORY icon.



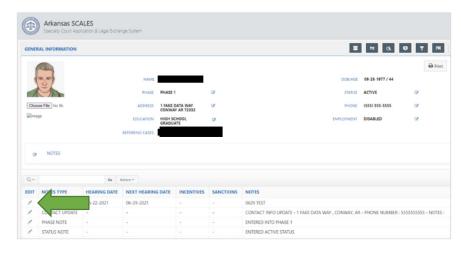
Case History opens with the following details:



- a. General Information and at-a-glance participant details are displayed in the Case History header. Details include Participant Photo, Name, DOB/Age, current Phase, current Status, Address, Phone, Education level, Employment status, Referring Cases, and Notes.
- b. Icons to allow users to enter Docket Notes, initiate a Transfer, enter Supervision Notes, View Treatment Summary historical data, enter Drug Tests, and view Drug Test Results.
- c. Participant Photo may be updated by clicking Choose File, selecting a photo, then clicking Upload.
- d. All data with edit icons may be updated by clicking the edit icon then completing and submitting the page.
- e. The NOTES option in the Case History header allows user to add callout details to help personalize interaction with participant and/or alert team to important information. Notes entered here will all be written to Case History as an SPC Note type.
- f. Below the header, chronological details of participant progress are displayed by note type and date.
- g. Users may print and/or save the Case History Report by clicking the Print button.

Edit or Delete Case History Notes

In Case History, users may edit and delete notes they created. Click the pencil icon next to the note to be edited.



To edit a note, enter note changes then click Save. Updated note will display in Case History.



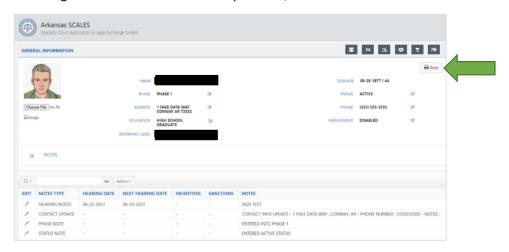
To delete a note, click the CREATED NOTE IN ERROR box and click Save. The note is no longer viewable in Case History.



Review Hearing Staffing Report

Open Case History for any participant (click Case Management Dashboard in Navigation area, then click on the Case History folder to the far right on each participant's row).

In the right corner of the Case History header, click Print to access the Review Hearing Staffing Report.



A separate page opens with the report and options to download or print.



The report is comprised of the following details:

- a. Date/Time stamp in upper right corner
- b. Report title with court name and location
- c. PHOTO, NAME, DOB/AGE, PHASE, STATUS, ADDRESS, PHONE, EDUCATION, EMPLOYMENT, and NOTES from case history header.
- d. IN PHASE displays the date participant promoted to current phase.
- e. SOBRIETY displays the number of sober days calculated based on drug test results as follows:
 - If there aren't any drug test results OR if the last drug test results were positive, SOBRIETY will be 0.
 - Otherwise, if there are only negative test results, SOBRIETY will be the number of days between today and the TEST DATE of the first negative test result.
 - Otherwise, SOBRIETY will be the number of days between today and the TEST DATE of the first negative test result after the last positive test result.
 - NOTE: Positive with Prescription results are counted as negative in the calculation.
- f. The HEARING NOTES section displays all hearing notes, sanctions, and incentives for the participant
- g. The CASE HISTORY NOTES section displays all note types, except HEARING NOTES, for the participant listed in Case History since the last HEARING DATE.
- h. The DRUG TEST section displays all non-negative drug test summary results.



Treatment Summary

Overview

Each week, the Treatment Provider will submit a Treatment Summary for each participant in the program. The Treatment Summary consists of the following four sections. Each section contains services or modalities that may or may not be required for the participant for the assessment week.

The following are contained within **TREATMENT SERVICES** section. At least ONE update is required in this section before the summary can be submitted:

- INDIVIDUAL COUNSELING
- GROUP COUNSELING
- DAY TREATMENT
- OUTPATIENT
- INTENSIVE OUTPATIENT
- INPATIENT TREATMENT CCC 30 DAYS

- INPATIENT TREATMENT CCC 60 DAYS
- INPATIENT TREATMENT CCC 90 DAYS
- INPATIENT TREATMENT CCC 120 DAYS
- INPATIENT TREATMENT CCC 180 DAYS
- INPATIENT TREATMENT CCC ONE YEAR
- INPATIENT TREATMENT PRIVATE FACILITY

The following are contained within **RECOVERY SUPPORT SERVICES** section:

- SUPPORT GROUP SERVICES (AA, NA, CR)
- MEDICATION-ASSISTED TREATMENT
- ENGAGED WITH PEER RECOVERY SPECIALIST
- SOBER LIVING
- GED COURSES
- CAREER READINESS COURSES
- EMPLOYMENT SERVICES
- BUDGETING/FINANCIAL STABILITY CLASSES

The following are contained within the **MODALITIES** section:

- MORAL RECONATION THERAPY
- COGNITIVE BEHAVIORAL EDUCATION
- SEEKING SAFETY
- RELAPSE PREVENTION
- ANGER MANAGEMENT
- PARENTING CLASSES
- GRIEF COUNSELING
- MENTAL HEALTH COUNSELING
- DOMESTIC VIOLENCE COUNSELING

Only those required by the participant for the assessment week need to be updated. Updates include whether the participant completed or was compliant, who provided the service or modality (providers are managed by the team admin), and if a therapeutic adjustment is recommended. The following are contained within the **WEEKLY ASSESSMENT** section and are required to be assessed and submitted weekly:

- MOOD (select one)
 - **APPROPRIATE** suitable or proper for the circumstances.
 - **ANXIOUS** experiencing worry, unease, or nervousness.
 - **DEPRESSED** in a state of general unhappiness or despondency.
 - ANGRY feeling or showing strong annoyance, displeasure, or hostility.
 - **EUPHORIC** feeling intense excitement and happiness.
- AFFECT (select one)
 - **APPROPRIATE** an expression of mood or feeling that is in harmony with, or naturally indicative of, the accompanying thought, action, reaction, or verbal expression.
 - **INTENSE** having or showing strong feelings or opinions; extremely earnest or serious.
 - BLUNTED a disturbance in which emotional responses to situations and events are dulled.
 - **INCONGRUENT** lack of consistency or appropriateness, as when one's subjective evaluation of a situation is at odds with reality.
 - LABILE highly variable, suddenly shifting emotional expression.
- MENTAL STATUS (select one)
 - **APPROPRIATE** appearance, behavior, and thoughts are aligned with circumstances.
 - MEMORY DIFFICULTY reduced ability to remember things such as dates and names, and increased forgetfulness.
 - **CONCENTRATION DIFFICULTY** inability to focus cognitive resources on certain aspects of the environment and the central nervous system is not in a state of readiness to respond to stimuli.
 - DISORIENTED confused and unable to think clearly.
 - **DISRUPTIVE** causing trouble and therefore stopping something from continuing as usual.

67

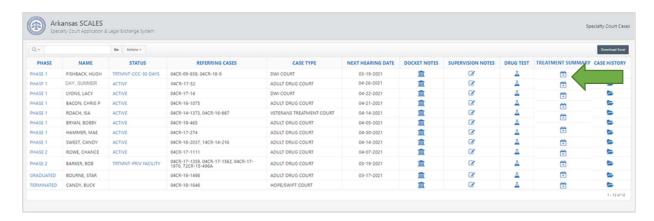
- RESPONSES TO TREATMENT INTERVENTION(S), THIS WEEK (select all that apply)
 - **COOPERATIVE** willing to be helpful by working together toward a common goal.
 - **RESPONSIVE** reactive to treatment, resulting in improvement.
 - NEUTRAL neither responsive nor resistant.
 - **PASSIVE** accepting or allowing what happens without active response or resistance.
 - **GUARDED** cautious and having possible reservations
 - DEFENSIVE anxious to challenge or avoid criticism
 - RESISTANT reluctance to accept treatment or comply with prescribed regimens.
 - **SUSPICIOUS** mistrust of the motives or sincerity of others.
 - LACKS INSIGHT inability to understand, recognize or accept circumstances.
 - AGGRESSIVE tendency toward social dominance, threatening behavior, and hostility.
- STAGE OF CHANGE (select one)
 - **PRECONTEMPLATION** not thinking seriously about changing, are not interested in any kind of help, defensive, and do not feel there is a problem.
 - **CONTEMPLATION** more aware of the personal consequences of their situation, spend time thinking about their problem, can consider the possibility of changing, but tend to be ambivalent about it.
 - **PREPARATION** made a commitment to make a change, begin taking small steps to improve, gather information about what needs to be done to change behavior.
 - **ACTION** believe in ability to change behavior and are actively involved in taking steps to change their behavior using a variety of different techniques.
 - MAINTENANCE able to avoid temptations and previous behaviors, maintain the new status quo, and realize how much progress has been made.
- PROGNOSIS (select one)
 - **EXCELLENT** the participant is most likely to have treatment success.
 - **GOOD** the participant has a favorable chance of treatment success.
 - FAIR there are some signs and symptoms which indicate participant is likely to have treatment success.
 - POOR there is little chance for treatment success.

Create a NEW Treatment Provider Assessment – TREATMENT PROVIDERS only

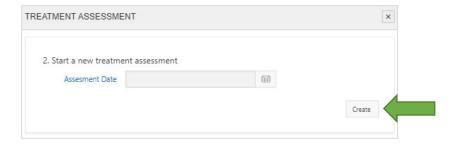
Only those with the TREATMENT PROVIDER role on the team admin panel will have access to create a weekly TREATMENT SUMMARY. The TREATMENT SUMMARY can be created, saved, and edited throughout the week.

To create a new TREATMENT SUMMARY:

Navigate to Case Management Dashboard then select the TREATMENT SUMMARY icon for the participant.

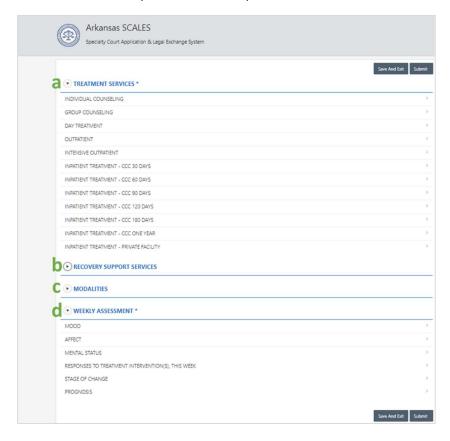


A page will open prompting user to select an Assessment Date. Click the calendar icon, select the date, then click Create.

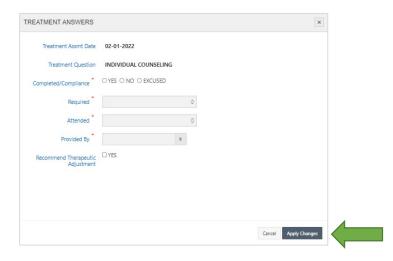


The Treatment Summary page will open.

- a. Users need to add an update for all TREATMENT SERVICES required by the participant over the previous week. **NOTE**: At least ONE update in this section is required.
- b. Users need to add an update for all RECOVERY SUPPORT SERVICES required by the participant over the previous week. Click the arrow to expand this section.
- c. Users need to add an update for all MODALITIES required by the participant over the previous week. Click the arrow to expand this section.
- d. Users are required to add an update for all WEEKLY ASSESSMENT options.



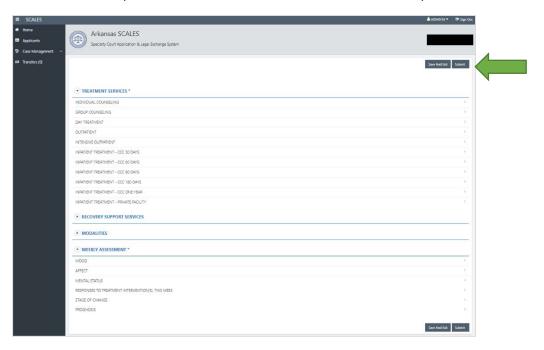
To add an update, click the item. For example, click INDIVIDUAL COUNSELING, to open an update page for that service. Complete the required fields. If a therapeutic adjustment is recommended, click YES and complete the increase or decrease amount. Once complete, click Apply Changes to save the update.



Complete all the updates for the service/modalites required of the participant for the previous week. Then complete the WEEKLY ASSESSMENT section by clicking each category, completing the update page and applying changes.



Once all relevant updates have been saved, click Submit to add the update for the week.



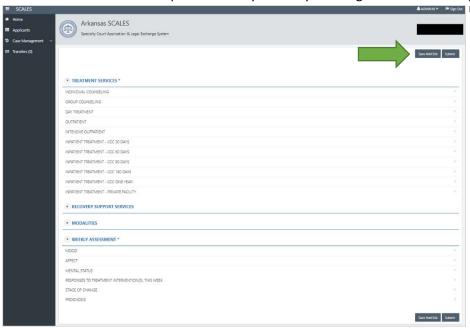
IMPORTANT: Before the summary can be submitted, users are required to complete:

- At least ONE update under TREATMENT SERVICES
- ALL updates under WEEKLY ASSESSMENT

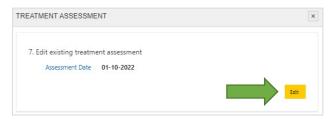
72

To save and edit a TREATMENT SUMMARY

Users can add incremental updates as they occur by creating the new summary, updating information, then clicking Save and Exit.



To access, edit and submit, click the TREATMENT SUMMARY icon for the participant, then click Edit. The assessment will open with previous changes.



Automatic Updates to Case History

Once the treatment summary is submitted, automatic updates will be added to Case History based on the information provided. There is a unique note type for each service/modality. One update for each service/modality type updated will be added to Case History (in the example below, individual counseling). Additionally, a WEEKLY TREATMENT ASSESSMENT update will be added to document the mood, affect, mental status, response(s) to treatment, stage of change, and prognosis.

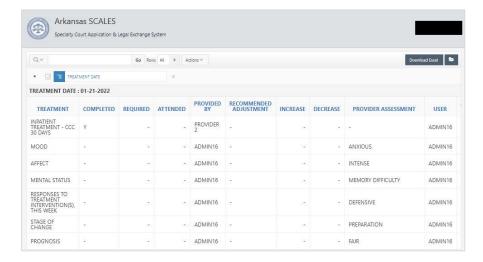


View Treatment Summary History

All users can view the submitted treatment summaries. From the Case Management dashboard, click the Case History icon for the participant. Then click the Treatment Summary icon.



The report will display with the most recent update at the top. Only the rows updated will display in the history. Users can use the blue headers to further slice and dice the information.

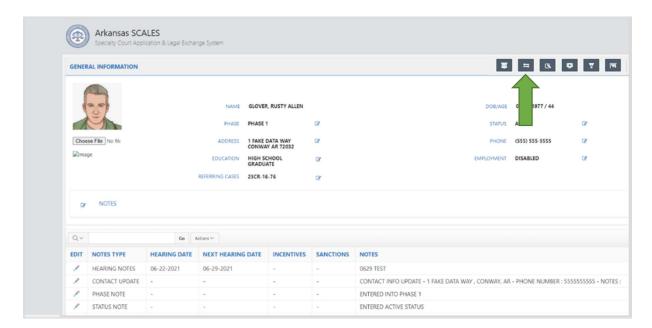


Transfer Participants

Users may manage transfer requests to and from other specialty courts across the state. Any requests to and/or from another court will appear in the Transfers dashboard.



From within Case History of a specific case, users can initiate a transfer request by selecting the Transfer button.



A Case Transfer page will open. Select the Transfer Court and Transfer Location, then click Submit.



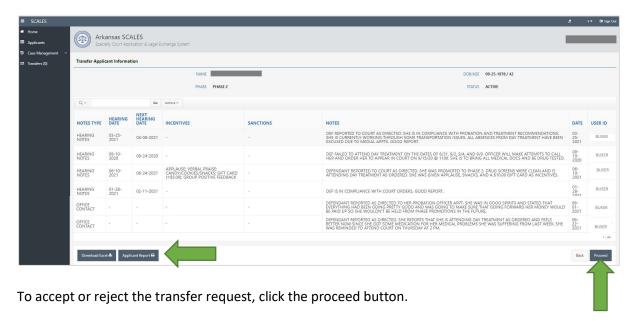
Page will close and the Transfer Dashboard number in parenthesis will increase by 1 for both courts to alert users to PENDING Transfer Request. (In the example below, one case has been requested to transfer from Court A to Court Z and another case has been requested to transfer from Court B to Court A.)



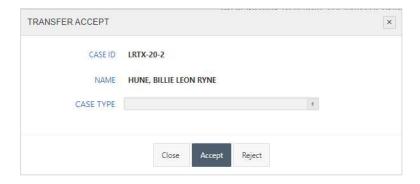
For transfer requests to the user's court, user can click the APPLICANT ID to view the applicant and case history information in full.



A Transfer Applicant Information page will open with the Case History of the participant in the current court. Users may click the Applicant Report to view the original accepted application.



Select the Case Type then select the decision for the transfer request.



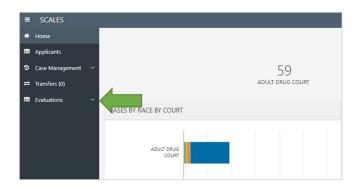
If rejecting the transfer request, select the reason for the reject then click Submit. The decision and reason will be displayed on both court Transfer Dashboards.

If accepting the transfer request, the originating application and case history will be copied to the new court and be available in Case Management. The originating specialty court case will reflect a phase and status of TRANSFERRED.

Evaluations

Complete a Self-Assessment

To complete a specialty court team self-assessment, from the navigation area, click the down arrow next to the Evaluations dashboard.



Select Self Assessments.

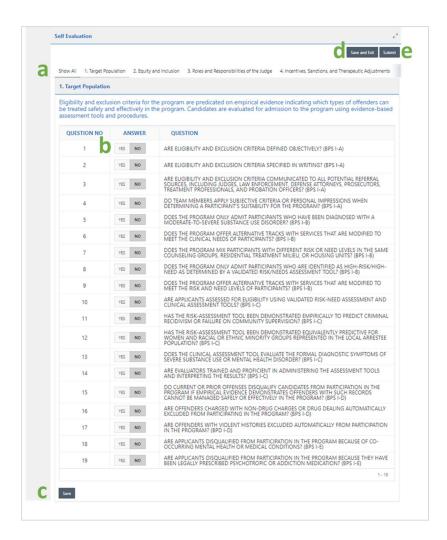


User will be able to complete an assessment for each team of which they are a member in SCALES. Select the COURT, LOCATION, and CASE TYPE for the team being assessed then click START.

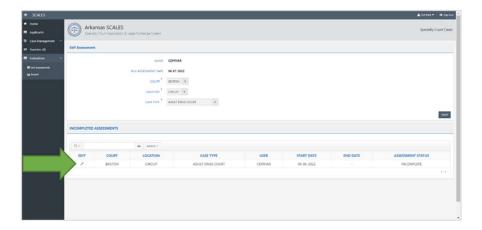


On the Self Evaluation,

- a. The page opens in the default "Show All" view. User has the options to scroll through the entire evaluation or select the tab for each Best Practice Standards section.
- b. All answers are defaulted to NO. User can toggle answers by clicking either YES or NO.
- c. Each section has a Save button to save progressively.
- d. User has the option to Save and Exit the assessment for later completion.
- e. Once all questions have been answered, click Submit.



When Save and Exit is selected, a row is displayed in the Self Assessments sub-dashboard in the INCOMPLETED ASSESSMENTS section. Click the pencil icon to continue editing the assessment.

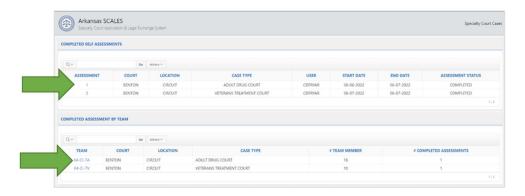


To view submitted self-evaluations and aggregated responses from self-evaluations submitted by other team members, click the Report subdashboard.

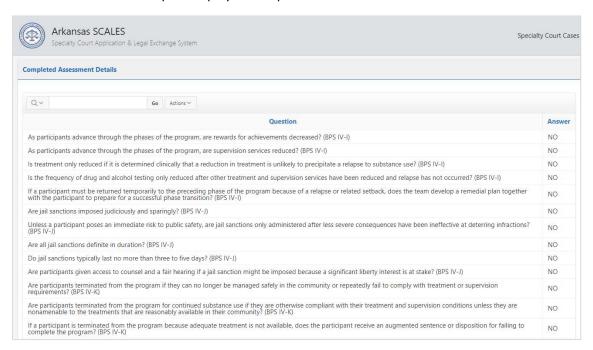


Self-Assessment Reports

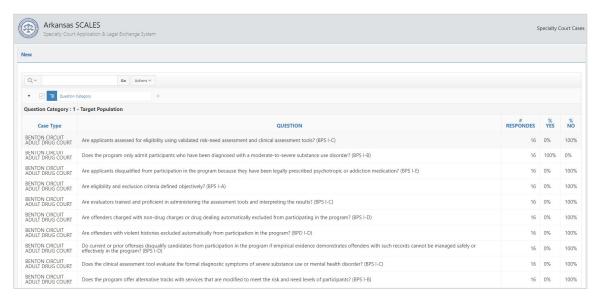
There are two report sections, COMPLETED SELF ASSESSMENTS and COMPLETED ASSESSMENTS BY TEAM. To view a report in either section, click the blue link to the left of the report.



The SELF ASSESSMENT report displays each question and submitted answer.

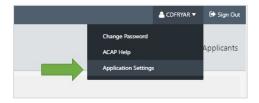


The Team report displays the questions, the number of responses recorded across the team, and the percentages of YES/NO answers for each question.



Application Settings

Application Settings allow users to view and/or manage frequently used data within the application such as SPC team members, drug panels, and treatment providers, to access, from the drop down next to USERNAME to the right, select Application Settings.



Drug Panels

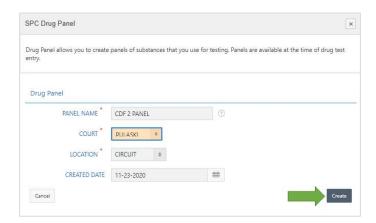
To add, edit or delete a drug panel, select the Drug Panels tab.



Click the + to the right to create a new drug panel.



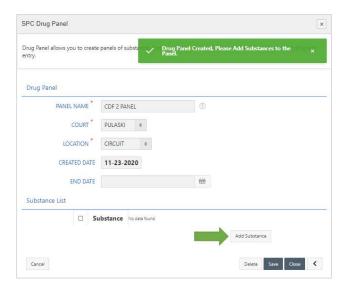
Enter PANEL NAME, select COURT and LOCATION, and CREATED DATE then click Create.



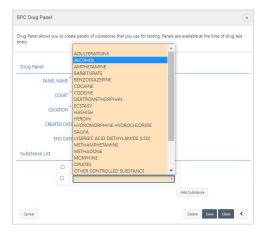
A drug panel will need to be created for each location. The CREATED DATE may be backdated if needed.

86

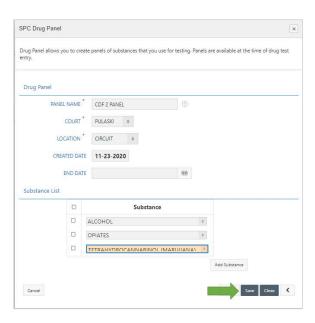
A banner will display if the panel was created successfully. Next click Add Substance.



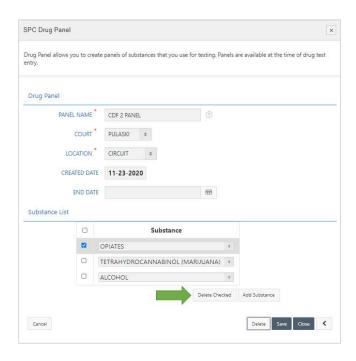
Select substance from drop down list.



To continue adding substances, click Add Substance and select substance until all substances have been entered, then click Save.



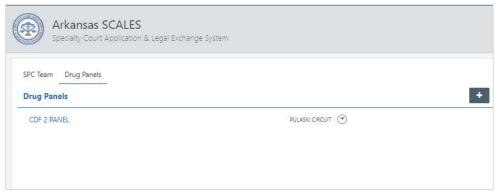
To delete substance, check box next to substance to be deleted and click Delete Checked. A message will ask to confirm the deletion.



Once the panel is set up as intended, click Save then Close.

NOTE: Do not enter END DATE at time of creation. This field is to be filled in only once a panel is no longer used and can be selected by editing the drug panel (see next section).

The new drug panel will now be displayed in Application Settings, Drug Panels.



Manage Drug Panels

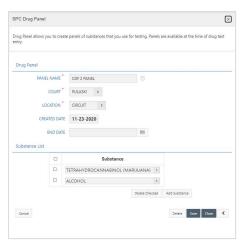
To see the details of the drug panel, click the down arrow.



To edit the panel, click the drug panel name.



User may add substances, delete substances, and change panel names/dates then click Save and Close to complete changes.



NOTE: If a panel is no longer used, user can enter END DATE to maintain record of the panel in the Application Settings. The panel name will no longer be available for selection for users when capturing drug test results.

Manage Treatment Providers and Vendors

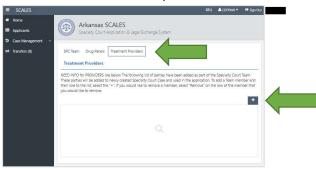
For each Treatment Provider and vendor used by the team, the ADMIN will need to add a record from the Application Settings area. Once these have been added, the providers will be available in the drop-down menu in the Treatment Summary pages.

To add a new Treatment Provider:

From the admin menu, upper-right corner, click the down arrow next to your USERID, then select Applications Settings.



Select Treatment Providers, then click + to add a new provider.

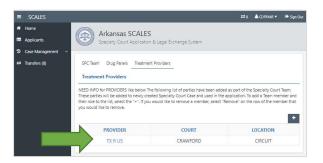


Add the PROVIDER NAME, the COURT, and LOCATION, then click Create.

NOTE: For ADMINS with multiple courts and/or locations, a provider will need to be created for each.



The provider will now appear in the drop-down menu for "Provided By" on the Treatment Summary update page.



To edit or delete a Treatment Provider

Click the specific provider.



Click Delete to remove the provider OR make edits then click Apply Changes.

