Automated Jury Management Software

Pool Module
Quick Reference Guides

September 2010

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* Video demos available at http://courts.arkansas.gov/acap/JurorTrainingAccess.cfm

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Create a New Pool with Time*
(Getting a new group of people ready for a new term of service)

1.	After logging into the program, click the Pool Module icon.
2.	Click the **New Pool** button. The **Create New Pool** screen will appear.
3.	Click the blue calendar button to the right of the **Response Date this Pool** field to select the date of orientation (or the first date of the new term). Select the month, year, and date needed.
4.	Enter the number of pool members needed (as ordered by the judge) in the **No. of Pool Members** field.
5.	Select the appropriate jurisdiction in the **Pool Jurisdiction** field.
6.	Select the pool group in the **Pool Type** field. The default selection is Petit but other group designations are available (days of the week, Group A, Group B, etc.). Pool Type will print on the summons.
7.	Select the judge for this pool in the **Judge** field.
8.	Select the time pool members need to be in the courtroom in the **Time** field. This time will be recorded in each participant record and print on the summons.
9.	Do not check the **Special Pool** box. This is used for a Grand Jury or a special judge who wants their own group for a high profile trial.
10.	If there is a date certain orientation (Response Date this Pool), leave the **On Call** box unchecked. If there is no date certain orientation, check the **On Call** box. Doing so will enter a 00/00/0000 date on all records, and no date will print on the summons.
11.	Click **Accept**.
12.	Click **Yes** to confirm the creation of the new pool. A list of people randomly selected by the program will display. Only their Participant Number and City is visible here.
13.	Click **Accept**. A message box for printing the **Pool Selection List** will appear.
14.	Click **Yes**. A message box for sorting appears with the default selection of **Sort By Last Name**.
15.	Click **Accept**. The printer's dialog box will appear.
16.	Click **OK** to print. The Pool Maintenance window will appear.

Video demonstration available at http://courts.arkansas.gov
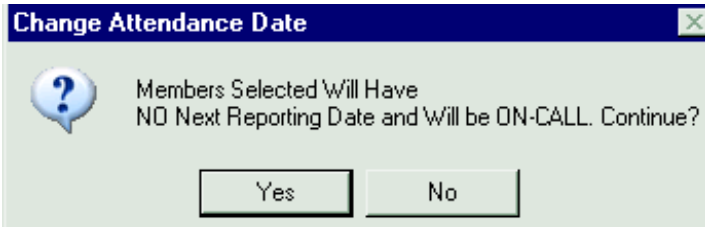
Change a Pool Type

		After creating a pool, it may be necessary to change the Pool Type. This quick reference guide outlines those steps.
	1.	After logging into the program, click the Pool Module icon.
	2.	Click the **Pool** menu item.
	3.	Highlight **Pool Records** and click **Change Pool Type** on the sub-menu.
	4.	The **Change Pool Members Type** screen will appear.
	5.	Click the arrow to the right of the **From Pool No** field to view a list of pools, and double click the pool number whose Type will be changed.
	6.	Click the arrow to the right of the **Reassign To Pool Type** field to view the options, and select the new Type. (Scrolling <u>up</u> may be necessary to view all options.)
	7.	Click **Accept**. The change has been made to the selected pool, and the Pool Maintenance window will appear.

Change Attendance Date for a Pool

	This quick reference guide outlines how to change the next attendance date for pool members.
1.	After logging into the program, click the Pool Module icon. The Pool Maintenance window will appear.
2.	Click the **Att Date** button.
3.	Click the arrow to the right of the **Enter Pool No** field to view a list of pools, and double click the needed pool number.
4.	Click the calendar button to the right of the **Next Attendance Date** field to select the month, date, and year needed.
5.	Click the arrow to the right of the **Time** field, and select the time people need to be in the courtroom on the new date.
6.	The section of the screen with the three checkboxes acts like a filter for the records. Each check mark means "yes, apply that filter." In most courts, a user would <u>uncheck</u> **Responded Participants Only** and <u>check</u> **Include Panel Members For Selected Pool** *and* **Include Participants On Call**.
7.	Click **Accept**. An alphabetical list of pool members (based on the filters selected) will display with a check mark beside each name.
	For those counties (courts) which have the entire pool report for a trial, **skip to step 12**. For those counties which have only part of the pool report for each trial, **continue with step 8**.
8.	Click the **Untag** button to remove all check marks. The names must now be placed in random number order (pool sequence number order).
9.	Click the column heading of the **Seq#** column to put the list of names in random number order.
10.	As an example, the judge has ordered the clerk to have 50 people come for this trial. Holding down the Shift key on the keyboard, click the **Tag** column of the first person and then click the **Tag** column of a person further down the list. Repeat this process until 50 people have a check mark by their name. <u>Note</u>: Click **Count** to verify how many people have been tagged so far.
11.	If more than 50 people are tagged, simply click the **Tag** column of the extra people to remove the check mark. <u>Note</u>: It is important to tag people in sequence number order. By doing this *and* writing down the pool sequence number of the 50th person tagged, the next group of 50 can be tagged in random order for the next trial.
12.	Review the list and make any changes if needed.
13.	Click the **Accept** button. The Pool Maintenance window will appear.

Place a Group of People On Call*

	When a pool member is "on call," their participant record has <u>no</u> Next Report Date (00/00/0000). For courts which send a letter or call people when a trial is on go, placing those members on call has advantages. It keeps the records cleaner by avoiding FTA's. The steps below outline how to place a group of people on call.
1.	After logging into the program, click the Pool Module icon.
2.	Click **Att Date**. The Change Attendance Date screen will appear.
3.	Click the arrow to the right of the **Enter Pool No** field to view a list of pools, and double click the needed pool number.
4.	Do <u>not</u> select a **Next Attendance Date** or **Time**.
5.	To place responded people on call, check the **Responded Participants Only** box. <u>Note</u>: Checking this box will exclude anyone with a status of Pool, Excused, etc.
6.	Check the **Include Panel Members** box.
7.	Click **Accept**.
8.	Click **Yes** in the dialog box which appears. **Change Attendance Date** ✕ ❓ Members Selected Will Have NO Next Reporting Date and Will be ON-CALL. Continue? [Yes] [No] A list of people who meet the criteria in Steps 5 and 6 will display.
9.	Review the list and untag anyone if needed.
10.	Click **Accept**. The Pool Maintenance window will appear.
11.	To print a list of the people placed on call, click the **Reports** menu item.
12.	Click **On-Call Report**. The On-Call Report screen will appear.
13.	Click the arrow to the right of the **Enter Pool No** field to view a list of pools, and double click the needed pool number.
14.	Click **Accept**. The Pool On-Call Report will be displayed.
15.	Click **Print**. The printer's dialog box will appear.
16.	Click **OK** twice, and then click **Close**. The Pool Maintenance window will appear.

Example of report on back

Pool On-Call Report
Pool : 997090401

Jurisdiction: **CIRCUIT**

Type: **PETIT**

Location: **CEDAR COUNTY CIRCUIT COURT**

Judge : ROBERT REDWOOD

Date: **4/16/09**

Time: **10:49 AM**

Original Report Date: **4/21/2009**

Part No	Name	Phone Number	Comment
043132761 01-0021	ABRIGO, JON A 617 MAGNOLIA DR HAZELNUT, AR 72023		
000990979 01-0013	BISHOP, IRENE 39 ABINGDON LN APRICOT, AR 72365		
000653725 01-0025	BLOODWORTH, DAVID J 2875 HWY 50 SOUTH OAK CITY, AR 72473	870-349-2563	
000151343 01-0003	BUCHS, BRITTANY D 216 LOUANN DR PEACH, AR 72601-3467	870-577-1918	
023128346 01-0028	BURGESS, BONNIE J 185 HICKORY LANE BLACKBERRY, AR 72032		
282023226 01-0008	CALLAHAN, JOHN T 205 MEADOW CREEK- HASKELL APPLE, AR 72		
000103235 01-0026	CHISUM, PEGGY L PO BOX 367 MANGO, AR 72715		
048387022 01-0014	DOGGETT, JOSEPH C 852 BRADLEY 7 S FIG, AR 72029		
001388395 01-0006	GASSAMA, THOMAS R 2400 BRUCE ST #57 CANTALOUPE, AR 72143-5		
058643016 01-0019	HARPER, JIMMY R 419 QUARRY RD. PEAR, AR 72802-4537		
053956743 01-0018	HENRY, ROBERT L 1794 NIGHTENGALE LN MACADAMIA, AR 72126		
000362702 01-0016	HUGHES, GWENDOLYN 1005 N 28TH ST APT. B13 APPLE, AR 71742-624	352-520-6	
043135925 01-0010	JACKSON, DAVID M P O BOX 780 BLUEBERRY, AR 72023-7152		
000625039 01-0011	JIMENEZ, GARY W 3 CR 3951 WALNUT, AR 72527-1976		
000796290 01-0009	JOHNSTON, SCOTT A 111 ASHLEY PLACE HUCKLEBERRY, AR 71822	870-898-9453	
001369967 01-0004	LAMBERT, S G P O BOX 23J BANANA, AR 72010		
043117232 01-0015	LOVELL, JEANEANE D 1460 TIJERAS DATE, AR 72007		
048388544 01-0022	MCCARTY, EMMA J 1920 CALHOUN DR BLACKBERRY, AR 72021		
018395617 01-0005	MOORE, LAVERA T 200 ROBIN HOOD CT POMEGRANATE, AR 7237		
042110372 01-0017	PHILLIPS, DOUGLAS M 229 QUAIL VALLEY DR UGLI, AR 72855		

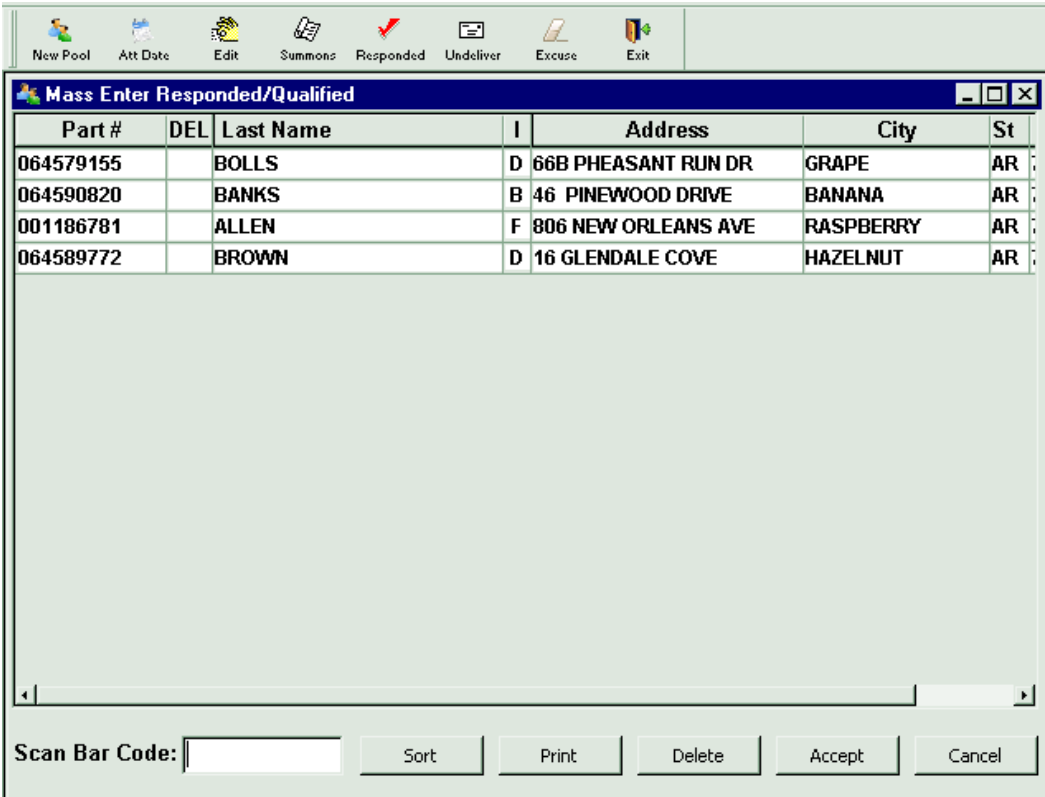## Summons 1 Printing with the Summons Button

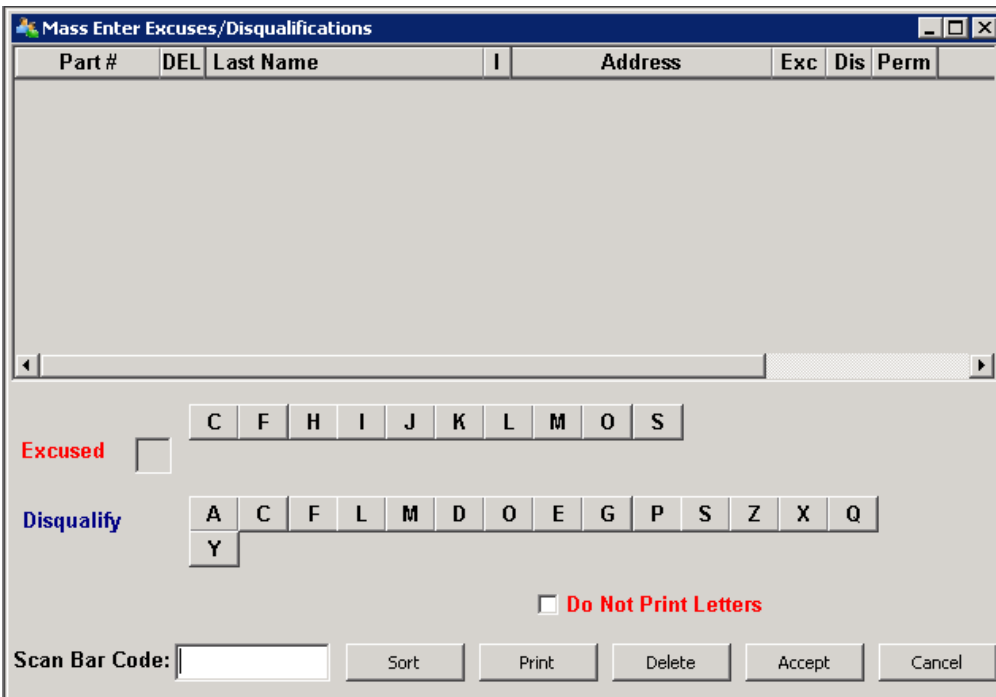|	
	Version 11 has two summons options, and these steps demonstrate how to print Summons 1 using the Summons button. Load the summons forms into your printer before beginning this process. It is also a good idea to print one or two test summonses before printing a large number.
1.	After logging into the program, click the Pool Module icon.
2.	Click the **Summons** button. The **Summons Printing** screen will appear.
3.	Click the arrow to the right of the **Pool Number** field to view a list of pools, and double click the pool number which needs summons printed.
4.	Click **Accept**. The **Default Values** screen will appear.
5.	Review all fields to verify the appropriate information will be printed on the summons, and then click **Accept**. The **Summons Printing** screen will appear displaying all pool members in last name, first name order.
	• If the printer can only handle small print jobs, continue with Step 6. • If the printer can handle large print jobs, click the **Tag All** button and continue with Step 7. Note: make sure summons forms are loaded in the printer. Fan (feather) the forms before loading.
6.	Click in the **Tag** column for the first 10 to 20 people. Make a note of the last person tagged. This will be the starting point for printing the next batch of summonses. Note: 10 to 20 is an example and this number should be based on the printer's capabilities.
7.	Click **Accept**. The sorting dialog box will appear.
8.	The default sort order is zip code. To change, click and drag **zip** from the right column to the left column. To sort by last name, click and drag **lname** (last name) from the left column to the right column. Sorting by last name, first name is the most common but summonses can be sorted by any of the fields in the **Specify Data** column.
9.	Click **OK**. The printer's dialog box will appear.
10.	Choose the printer's options and click **OK**. Summonses will print for those pool members tagged with a check mark.
11.	The program returns to the Pool Maintenance window. To continue printing the next batch, repeat Steps 2 through 10 for each batch.

Summons 2 Printing

	Version 11 has two summons options, and these steps demonstrate how to print Summons 2. Load the summons forms into your printer before beginning this process. It is also a good idea to print one or two test summonses before printing a large batch.
1.	After logging into the program, click the Pool Module icon.
2.	Click the **Reports** menu item.
3.	Go down to **Documents** (3rd item from the bottom of the menu).
4.	Go over to **Summons (2)** and click. The Summons Printing dialog box will appear.
5.	Click the arrow to the right of the **Pool Number** field to see a list of pools, and double click the pool number for which summonses will be printed.
6.	Click **Accept**. A list of all pool members will appear in last name, first name order.
7.	Click the **Free Text** button. The Default Values screen will appear.
8.	There are eight (8) 'free' text boxes where information can be entered, and then printed on the summons. These fields are: • Local Return Address • Box #2 • Summons Return • Box #3 • Orientation Location • Box #4 • Box #1 • Box #5
9.	After entering the appropriate information for each field, click the **Accept** button.
	At this point, a decision needs to be made on how many summonses will be printed at one time. If the printer can only handle small print jobs, continue with Step 10. If the printer can handle large print jobs, click the **Tag All** button and continue with Step 11. <u>Note</u>: make sure summons forms are loaded into the printer. Fan (feather) the forms before loading.
10..	Click in the **Tag** column for the first 10 to 20 people. Make a note of the last person tagged. This will be the starting point for printing the next batch of summonses. <u>Note</u>: 10 to 20 is an example and this number should be based on the printer's capabilities.

11.	Click **Accept**. The **Specify Sort Columns** dialog box will appear.
12.	The default sort order is zip code. To change this, click and drag **zip** from the right column to the left column. To sort by last name, click and drag **lname** (last name) from the left column to the right column. Note: Sorting by last name, first name is the most common method, but summonses can be sorted by any of the fields in the **Source Data** column.
13.	Click **OK**. The printer's dialog box will appear.
14.	Choose the options for the printer and click **OK**. Summonses will print for those pool members tagged with a gold check mark.
15.	The program returns to the Pool Maintenance window. To continue printing the next batch of summonses, repeat Steps 2 through 14 for each batch.

Enter Mass Responded and Undeliverable

	These steps are followed to enter a <u>responded</u> (qualified) status for multiple people in one screen within the program. Note: This procedure can also be followed to enter an <u>undeliverable</u> status for multiple people. The only change would be to click the Undeliver button in Step 2 (6th button from the left) instead of the Responded button. The Mass Enter Undeliverables screen will open.
1.	After logging into the program, click the Pool Module icon.
2.	Click the **Responded** button (5th button from the left). The **Mass Enter Responded/Qualified** screen will appear.
3.	Click in the **Scan Bar Code** field.
4.	Scan the participant number bar code from the summons or type the individual participant number into the **Scan Bar Code** field.
5.	Continue in this manner until all responded (qualified) people have been entered. **Mass Enter Responded/Qualified**
6.	After scanning or entering all names, click **Accept**. The **Mass Enter** screen will close and the Pool Maintenance window will appear.

In step 2 toolbar: New Pool | Att Date | Edit | Summons | Responded | Undeliver | Excuse | Exit

In step 5:

Toolbar: New Pool | Att Date | Edit | Summons | Responded | Undeliver | Excuse | Exit

Part #	DEL	Last Name	I	Address	City	St
064579155		BOLLS	D	66B PHEASANT RUN DR	GRAPE	AR
064590820		BANKS	B	46 PINEWOOD DRIVE	BANANA	AR
001186781		ALLEN	F	806 NEW ORLEANS AVE	RASPBERRY	AR
064589772		BROWN	D	16 GLENDALE COVE	HAZELNUT	AR

Scan Bar Code: [   ]   Sort | Print | Delete | Accept | Cancel

Enter Mass Excuses and Disqualifications

	These steps are followed to enter <u>excuses</u> for multiple people in one screen. When entering mass excuses from returned summons forms, sort the forms into excuse categories first (i.e., small children, health, etc). This procedure can also be followed to enter <u>disqualifications</u> for multiple people. The only change would be the selection of codes in Step 3.
1.	After logging into the program, click the Pool Module icon.
2.	Click the **Excuse** button. The **Mass Enter** screen will appear.
3.	If entering excuses, click an Excuse code. - C – Jury Service Complete - F – Financial Burden - H – Health or Family Health - I – Doctor's Letter - J – Job Related - K – Small Children - L – Moved to Different Jurisdiction - M – Military - O – Other - S – Served within 2 Years If entering disqualifications, click a Disqualification code. - A – Less than 18 years of age - C – Not a Citizen of US - F – Convicted Felon - L – Not able to speak English - M – Not Resident of Jurisdiction - D – Deceased - O – Other - E – Unable to Read/Write English - G – Not of Good Character - P – Physical / Mental Disability - S – Served within Two Years - Z – Out of County

4.	Click in the **Scan Bar Code** field.
5.	Scan the participant number bar code from the summons, or type the individual participant number into the **Scan Bar Code** field.
6.	To excuse the next person for the same reason selected in Step 3, scan the bar code from the summons, or type the individual participant number into the **Scan Bar Code** field. Continue in this manner until a <u>different</u> excuse or disqualification code is needed.
7.	Repeat Steps 3 through 6 until all excuses / disqualifications have been entered.
8.	Click **Print** to print a list of names entered. (A sample list is at the bottom of the page.)
9.	Click **OK** in the printer's dialog box.
10.	Check the **Do Not Print Letters** checkbox if excuse / disqualification letters are <u>not</u> printed through the program to mail to individuals. Leave this checkbox unchecked if letters <u>are</u> printed and mailed.
11.	After scanning or entering all excuses, click **Accept**. The Pool Maintenance window will appear.
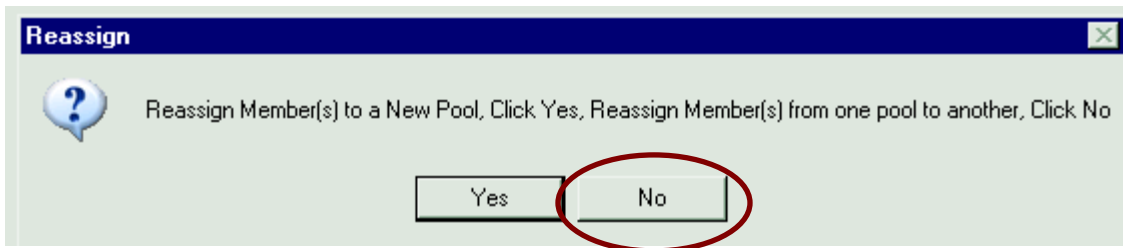
Part #	Last Name	I	Address	Exc	Dis	Perm	City	St	Zip
069951859	FORD	P	510 ONDO LN	H			GRAPE	AR	726805152
001162118	GIBBS	K	7 SMITHDALE AVENUE	H			CASHEW	AR	72019
001491722	HINDS	R	11276 HINDS RD	H			LIME	AR	72315
043128455	PILLSBURY	D	2100 RIDGEWOOD	F			PEACH	AR	720073467
008113018	MCDONALD	J	HC 79 BOX 1	F			LIME	AR	72631
053958851	PHILPOT	S	1505 FAYE ST	L			CANTALOUPE	AR	720705278
018391997	MCDANIEL	A	5209 TIMBERCREEK CR	L			GRAPE	AR	723645152
003100708	LOVE	E	15475 HWY 38E	L			PERSIMMON	AR	726538364

Sample

Add New People to an Existing Pool

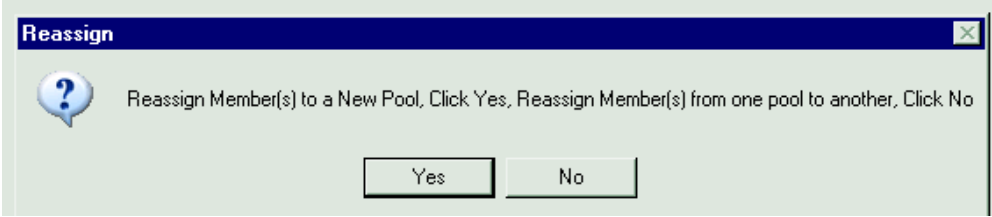|	
	These steps illustrate how to add new member(s) to an existing pool.
1.	After logging into the program, click the Pool Module icon.
2.	Click the **Pool** menu item, highlight **Create/Maintain Pools**, and click **Add Members To An Existing Pool**. The Add To An Existing Pool screen appears.
3.	Click the arrow to the right of the **Existing Pool No** field to see a list of pools, and select the pool which needs additional members.
4.	Enter the number of member(s) to be added in the **No. Members To Add** field.
5.	Click the arrow to the right of the **Time** field and select the time which appears on the records of the existing pool members. Note: If the existing pool is an 'on call' pool, check the **On Call** box.
6.	Click **Accept**.
7.	The **Add To Pool** screen appears with a list of randomly selected people who will be added to the existing pool. The number of members displayed will be the number entered in Step 4.
8.	Click **Accept**. The new people are added to the pool.
9.	The option to print a Pool Selection List is offered. If **Yes** is clicked, only the newly added pool members will be displayed on the report. The report is called the **Add To Pool Report**.
10.	If printing this report, the **Sort Order** screen will appear with the **Sort By Last Name** option selected. Select another option if desired and click **Accept**.
11.	The report will print and the Pool Maintenance window will appear.
Note:	To print a list with all pool members, use the **Pool Selection List** option under **Reports**.

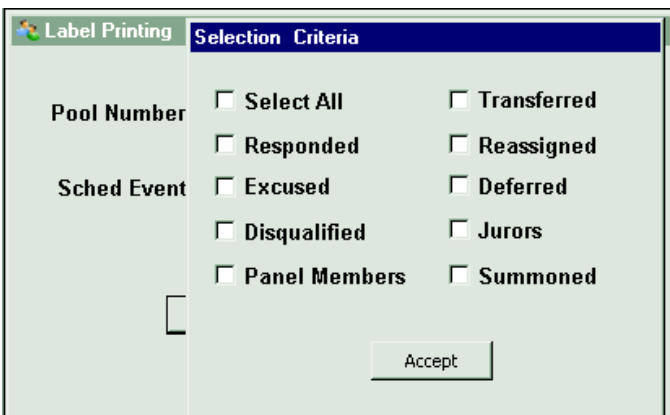## Reassign a Person from One Pool to Another Pool

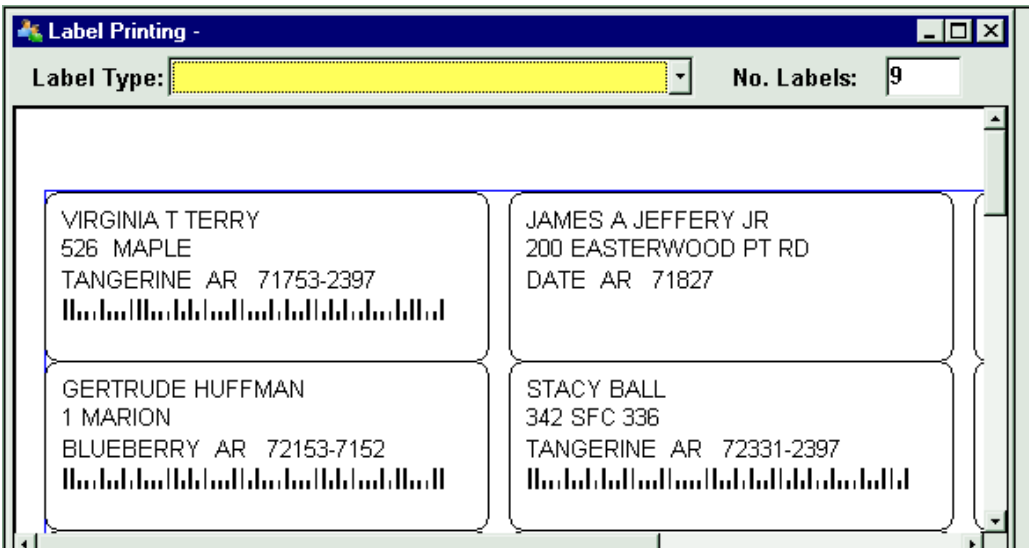|	
	This quick reference guide outlines the steps for moving a person (or persons) from one existing pool to another existing pool.
1.	After logging into the program, click the Pool Module icon.
2.	Click the **Pool** menu item, highlight **Create/Maintain Pools**, and click **Reassign Pool Members**.
3.	Click **No** in the **Reassign** message box which appears. Clicking 'No' will cause the person(s) to be moved from one existing pool to another existing pool.
4.	In the Reassign Pool Member(s) screen, click the arrow for the **From Pool No** field, and select the pool where the individual is currently assigned.
5.	Click the arrow for the **Reassign To Pool No** field, and select the pool where the individual will be reassigned.
6.	Click **Accept**.
7.	The **Reassign** screen will appear showing a list of members in the "From" pool.
8.	The names are listed in pool sequence number order. If the names need to be sorted in a different order, click the **Sort** button to change the order.
9.	Click in the **Tag** column beside the name (or names) of those people who <u>will be</u> reassigned. Note: The **Count** button can be clicked to verify the number of people being reassigned.
10.	After tagging the correct number of people, click **Accept**. The Pool Maintenance window will appear.

Reassign a Pool Member to a New Pool

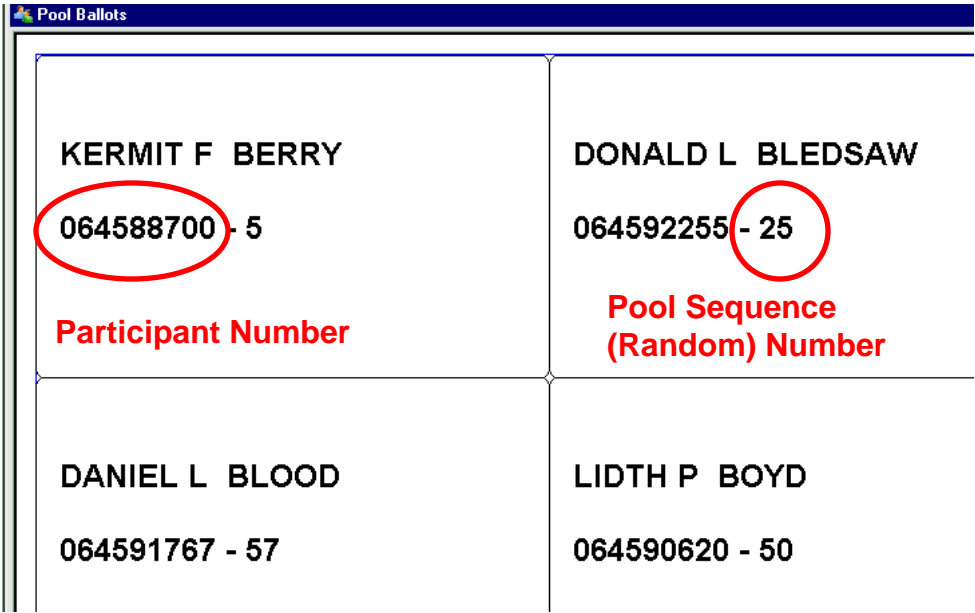|	
	These steps illustrate how to reassign an individual from an existing pool to a new pool. The system will create a new pool during this process.
1.	After logging into the program, click the Pool Module icon.
2.	Click the **Pool** menu item, highlight **Create/Maintain Pools**, and click **Reassign Pool Members**.
3.	Click **Yes** in the Reassign message box which appears. Clicking 'Yes' will cause the person(s) to be moved from an <u>existing</u> pool to a <u>new</u> pool.
4.	The **New Pool** screen appears. Fill in the appropriate information for creating a new pool and click **Accept**.
5.	Click **Yes** in the message box to confirm the creation of a new pool.
6.	The **Reassign Pool Member(s)** screen appears. Notice the **Reassign To Pool No** field is filled in with the newly created pool number.
7.	Click the arrow for the **From Pool No** field to select the pool where the individual is currently assigned.
8.	Click **Accept**.
9.	A list of all members in the "From" pool will appear.
10.	Click in the **Tag** column by the name of anyone who will be reassigned to the newly created pool. (If more than one person is being reassigned, using the **Sort** and / or **Count** buttons may be helpful.)
11.	Click **Accept**. The Pool Maintenance window will appear.
Note:	To have a list of pool members in the newly created pool, print the Pool Selection List from the Reports menu in the Pool Module.

Printing Labels for a Pool

1.	After logging into the program, click the Pool Module icon. The Pool Maintenance window will appear.
2.	Click the Reports menu item and click **Labels**, the next to the last item on the menu. The Label Printing screen will appear. <u>Note</u>: This is a new location for the Labels menu item.
3.	Click the arrow to the right of the **Pool Number** field to see a list of pools, and double click the needed pool number.
4.	Place a check mark in the **Print for Mailing** box if the labels will be used for mailing. Mailing labels will have names, addresses, and postal bar codes (if the 4 digit zip code extension is in the program). If the labels will be used for bar code scanning, leave this check box empty.
5.	Click **Accept**. The Selection Criteria screen appears.
6.	Place a check mark in the **Select All** box to print labels for <u>*all*</u> pool members. <u>Note</u>: If labels for all members are not needed, leave the Select All check box empty and check another Selection Criteria (i.e., Responded).
7.	Click **Accept**. An alphabetical list of pool members will display.
8.	The check mark by each name means a label will print for that person. If a label is not needed, click in the **Tag** column for that person to remove the check mark.
9.	Click **Accept** after reviewing the list and making any changes. A preview of the labels will appear in alphabetical order (last name, first name).
10.	After loading labels into the printer, click **Print.**
11.	Make the necessary selections for the printer and click **OK**.
12.	Click **Cancel** to close the Label Printing screen. The Pool Maintenance window will appear.

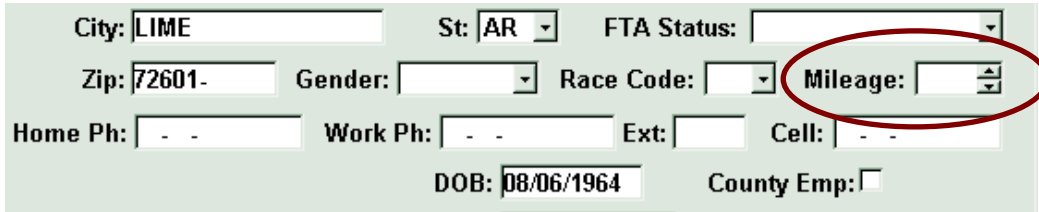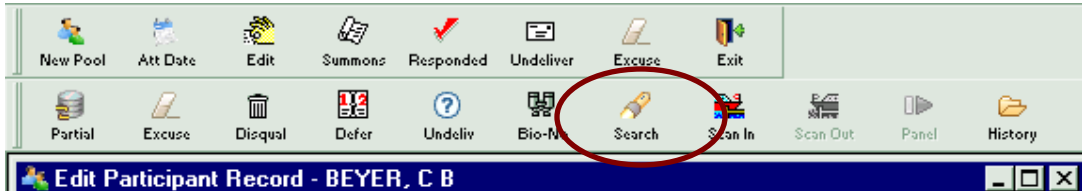## Printing Labels for a Pre-Panel

		This quick reference guide outlines how to print labels for a pre-panel group (a group of people attached to an event before the day of the event).
	1.	After logging into the program, click the Pool Module icon. The Pool Maintenance window will appear.
	2.	Click the Reports menu item and click **Labels**, the last item on the menu. The Label Printing screen will appear. Note: This is a new location for the Labels menu item.
	3.	Click the arrow to the right of the **Sched Event** field to see a list of events, and double click the event which has a pre-panel. Note: Do not select a pool number.
	4.	Place a check mark in the **Print for Mailing** box if the labels will be used for mailing. Mailing labels will have names, addresses, and postal bar codes (if the 4 digit zip code extension is in the program). If the labels will be used for bar code scanning, leave this check box empty.
	5.	Click **Accept**. The Selection Criteria screen will appear.
	6.	Place a check mark in the **Select All** box, and click **Accept**. An alphabetical list of all pre-panel members will display.
	7.	The gold check mark by each name means a label will be printed for that person. If a label is not needed for someone, click in the **Tag** column for that person to remove the check mark.
	8.	After reviewing the list and making any needed changes, click **Accept**. A preview of the labels will appear.

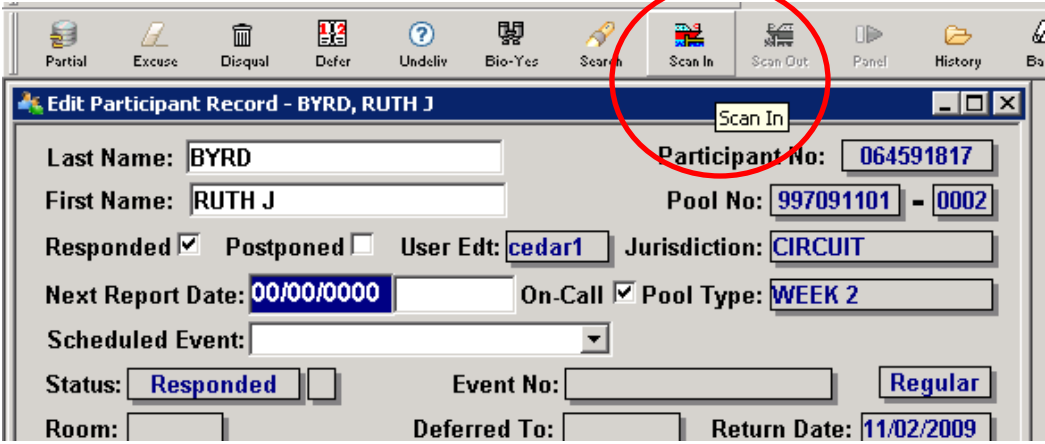|		
9.	The labels are sorted in zip code order for printing. To change the sort order to alphabetical, click the **Sort** button.
10.	Click and drag the **zip** field from the right column (**Columns**) to the left column (**Source Data**).
11.	Click and drag **lname** (last name) from the left column to the right column.
12.	Click and drag **fname** (first name) from the left column to the right column.
13.	Click **OK**. The labels will now be sorted in last name, first name order.
14.	After loading labels into the printer, click **Print.**
15.	Make the necessary selections for your printer and click **OK**.
16.	Click **Cancel** to close the Label Printing screen. The Pool Maintenance window will reappear.

Printing Ballots for Responded Pool Members

	This quick reference guide outlines how to print ballots for pool members with a status of Responded. Note: Only pool members with a Responded status will have a ballot printed.
1.	After logging into the program, click the Pool Module icon. The Pool Maintenance window will appear.
2.	Click the Reports menu item and click **Pool Ballots**, the last item on the menu. The Pool Ballots screen will appear.
3.	Click the arrow to the right of the **Enter Pool No** field to view a list of pools, and double click the needed pool number.
4.	Click the arrow to the right of the **Paper Type** field to view the choices, and select the type of paper the ballots will be printed on. Note: The two types of paper listed are perforated. Ballots can be printed on regular paper and cut apart.
5.	Click **Accept**. A preview of the ballots (in last name order) will be displayed.
6.	The ballots can be resorted if needed by clicking the **Sort** button.
7.	Click **Print**. The printer's dialog box will appear. Note: Be sure to load the perforated paper in the printer.
8.	Click **OK** and the ballots will print.
9.	Click **Close**. The Pool Maintenance window will appear.

Add Mileage in an Individual Participant Record

	These steps are followed to add mileage to an individual's participant record. If your court pays for mileage, the program can automatically add the mileage expense if the number of miles have been entered in the participant record. This process is completed in the Attend Module and is covered in the Adding Expenses quick reference guide.
1.	After logging into the program, click the Pool Module icon.
2.	Click the **Edit** button (yellow hand). The **Pool Member Search** screen appears.
3.	Enter the person's **Last Name, First Name** or **Participant Number**.
4.	Click **Accept** or press the Enter key. The **Participant Record** will display.
5.	In the **Mileage** field, click the up/down arrows until the correct mileage displays. City: LIME St: AR FTA Status: Zip: 72601- Gender: Race Code: Mileage: Home Ph: Work Ph: Ext: Cell: DOB: 08/06/1964 County Emp: Note: You can also click in the Mileage field and type the number of miles.
6.	Click the small black **X** to save and close. Note: If you have more mileage to enter, click the **Search** button instead of the small black **X**. The changes will be saved and the Search screen will appear. New Pool Att Date Edit Summons Responded Undeliver Excuse Exit Partial Excuse Disqual Defer Undeliv Bio-N Search Scan In Scan Out Panel History Edit Participant Record - BEYER, C B
7.	When finished entering mileage, click the **Cancel** button on the Search screen. The Pool Maintenance window will appear.

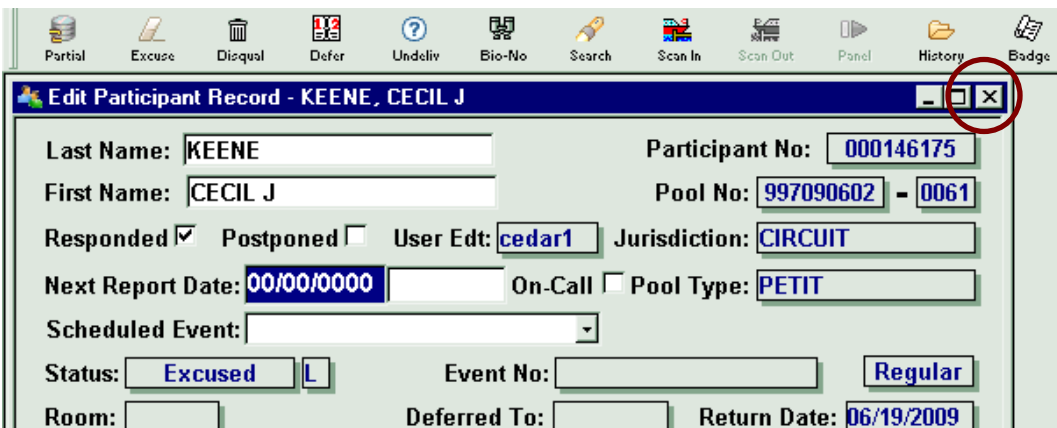## Attend an Individual in their Participant Record

	If a person answers roll call on the day of a trial and they are NOT on the barcode list, they can be scanned in (attended) through their individual participant record. The steps are outlined below.
1.	Go to the Pool Module.
2.	Click the **Edit** button. The Pool Member Search screen will open.
3.	Enter the person's **Last Name, First Name**.
4.	Click **Accept**. Their **Participant Record** will display.
5.	Click the **Scan In** button (8th button from the left). This person will be scanned in (attended) for the current date only.
6.	Click the small black **X** to save and close the record. The Search screen will appear.
7.	Continue attending individuals if needed.

Excuse a Person for Part of the Term of Service

		These steps are followed to give a person a <u>partial excuse</u> during the term of service. Examples are vacation, doctor's appointment, out-of-town meeting for employer, harvesting crops, etc.
	1.	After logging into the program, click the Pool Module icon.
	2.	Click the **Edit** button (yellow hand). The **Pool Member Search** screen will appear.
	3.	Enter the person's **Last Name, First Name** or **Participant Number**.
	4.	Click **Accept**. The **Participant Record** will display.
	5.	Click the **Partial** button (1st button from the left on the 2nd row of buttons). The **Partial Excuse Dates** screen will appear.
	6.	Click the <u>left</u> calendar to display a calendar, and select the month, year, and date needed. The date selected will appear in the left date field. (To enter the date without clicking the calendar, type the date in this format – DD/MM/YYYY.)
	7.	Follow Step 6 again using the <u>right</u> date field if the pool member needs to be partially excused for more than one day.
	8.	Click the **Insert** button. All dates between the first and last date of the partial excuse time period will be displayed in the **Date** column.
	9.	Double check the dates, and click the **Save** button. The **Participant Record** will be displayed.
	10.	Enter the reason and dates for the partial excuse in the **Notes** field. This information will be saved in the participant's history.
	11.	Click the small black **X** to save and close the **Participant Record**, or click the **Search** button. <u>Note</u>: Clicking the **Search** button automatically saves any changes. If the small black **X** is clicked, complete Step 12.
	12.	Click **Yes** to answer "Do you want to save changes?" The **Pool Member Search** screen will appear.
	13.	Continue entering partial excuses or click **Cancel** to exit.
	14.	To view a report which lists dates of any partially excused pool members, print the **Available List** (3rd report) from the **Reports** menu in the Pool Module. Any member with a partial excuse will have **Exempt** dates listed on this report.

Excuse a Person for the Term of Service

	These steps are followed to excuse a person for the term of service.
1.	After logging into the program, click the Pool Module icon.
2.	Click the **Edit** button (yellow hand). The **Pool Member Search** screen appears.
3.	Enter the person's **Last Name, First Name** or **Participant Number**.
4.	Click **Accept**. The **Participant Record** will display.
5.	Click the **Excuse** button (2nd button from the left). The **Excuse** screen will appear.
6.	Click the arrow to the right of the **Code** field.
7.	Select the appropriate excuse code for this person.
8.	Check the **Excused Letter** box (only if the court uses the Jury Program to print these form letters).
9.	Click the **Excuse** button. The **Participant Record** is displayed and the person's status is now **Excused**, and the **Next Report Date** has been changed to 00/00/0000.
10.	Make any necessary notes in the **Notes** field.
11.	Click the small black **X** to save and close the **Participant Record**.
12.	Click **Yes** to answer "Do you want to save changes?" The **Search** screen will appear.
13.	Continue entering excuses or click **Cancel** to exit. The Pool Maintenance window will appear.

Disqualify a Person from Service

	These steps are followed to disqualify a person from jury service. Steps to permanently disqualify a person are included in a separate guide.
1.	After logging into the program, click the Pool Module icon.
2.	Click the **Edit** button (yellow hand). The **Pool Member Search** screen appears.
3.	Enter the person's **Last Name, First Name** or **Participant Number**.
4.	Click **Accept**. The **Participant Record** will display.
5.	Click the **Disqual** button (3rd button from the left). The **Disqualify** screen will appear.
6.	Click the arrow to the right of the **Code** field.
7.	Select the appropriate disqualification code for this individual.
8.	Check the **Disqualified Letter** box (only if the court uses the Jury Program to print these form letters).
9.	Click **Accept**. The **Participant Record** is displayed, and the person's status is now **Disqualified**, and the **Next Report Date** has been changed to 00/00/0000.
10.	Make any necessary notes in the **Notes** field.
11.	Click the small black **X** to save and close the **Participant Record**.
12.	Click **Yes** to answer "Do you want to save changes?" The **Search** screen will appear.
13.	Continue entering disqualifications or click **Cancel** to exit. The Pool Maintenance window will appear.

Permanently Disqualify a Pool Member

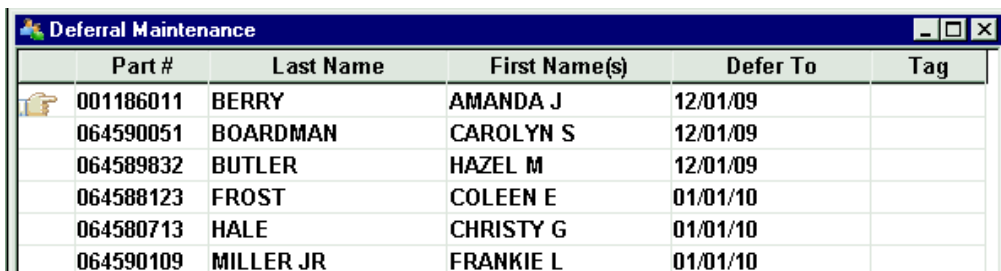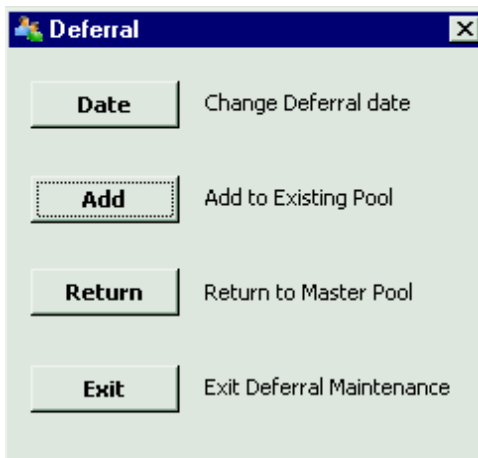|	
	These steps are followed to permanently disqualify a pool member. The two reasons a person should be permanently disqualified are Deceased and Bad Address Record. Deceased would be the most common use for a permanent disqualification.
1.	After logging into the program, click the Pool Module icon.
2.	Click the **Edit** button (yellow hand). The **Pool Member Search** screen will appear.
3.	Enter the person's **Last Name, First Name** or **Participant Number**.
4.	Click **Accept**. The **Participant Record** will display.
5.	Click the **Disqual** button (3rd button from the left). The **Disqualify** screen will appear.
6.	Click the arrow to the right of the **Code** field.
7.	Select **D – Deceased** or **X – Bad Address Record**.
8.	Check the **Permanently Disqualify** box.
9.	Click **Accept**. The **Participant Record** is displayed, and the person's status is now **Disqualified**. The red **X** indicates permanent disqualification.
10.	Make any necessary notes in the **Notes** field.
11.	Click the small black **X** to save and close the **Participant Record**.
12.	Click **Yes** to answer "Do you want to save changes?" The **Search** screen will be displayed.
13.	Continue entering permanent disqualifications or click **Cancel** to exit.

Defer a Person until the Next Term of Service

	These steps demonstrate how to defer a person until the next term of service. The <u>beginning date</u> of the next term of service will be needed to complete this process. <u>Note</u>: Defer should *not* be confused with Partial Excuse. Partial Excuse is used to excuse someone for a few days during the *current* term of service.
1.	After logging into the program, click the Pool Module icon.
2.	Click the **Edit** button (yellow hand). The **Pool Member Search** screen will appear.
3.	Enter the person's **Last Name, First Name** or **Participant Number**.
4.	Click **Accept**. The **Participant Record** will display.
5.	Click the **Defer** button (4th button from the left on the 2nd row of buttons). The **Deferral** screen will appear.
6.	Click the calendar to the right of the **Defer To Date** field. Select the month, year, and date which represents the <u>beginning date</u> of the next term of service. <u>Note</u>: By using the beginning date of the next term, the person being deferred will be pulled into the first pool created for the next term.
7.	Click the arrow to the right of the **Defer Reason** field, and select the appropriate reason for this individual.
8.	The **Deferred Letter** box is checked by default. Uncheck if this feature is not used. <u>Note</u>: The jury program can print form letters which let people know their deferral request has been granted or denied (Deferred Denied check box).
9.	Click the **Accept** button. The Participant Record is displayed, and the person's status is now **Deferred**. The **Next Report Date** has been changed to 00/00/0000, and their **Deferred To** date displays the date selected in Step 6.
10.	Make any necessary notes in the **Notes** field.
11.	Click the small black **X** to save and close the record.
12.	Click **Yes** to answer "Do you want to save changes?" The Pool Member Search screen will appear.
13.	Continue entering deferrals or click **Cancel** to exit.
Note:	A Deferral Summary Report lists dates deferred to and number of people deferred to those dates. To print this report – go to the Pool Module > click Reports > click Deferred List. The report will open and can be printed if needed.

Mark an Individual as Undeliverable

		These steps are followed to mark an individual record as undeliverable. This button will 'toggle' between **Undeliv** and **DelUndel** depending on the person's status.
	1.	After logging into the program, click the Pool Module icon.
	2.	Click the **Edit** button (yellow hand). The **Pool Member Search** screen will appear.
	3.	Enter the person's **Last Name, First Name** or **Participant Number**.
	4.	Click **Accept**. The **Participant Record** will display.
	5.	Click the **Undeliv** button (5th button from the left on the 2nd row of buttons).
	6.	The person's status is changed to **Undeliverable** and the **Next Report Date** is changed to 00/00/0000. Note: The **Undeliv** button has now changed to read **DelUndel**.
	7.	This change to the person's record has been saved automatically. Click the small black **X** to close the **Participant Record**, or click the **Search** button. The **Pool Member Search** screen will be displayed. Note: Clicking the Search button automatically saves any changes and closes the participant record.
	8.	Continue marking individual records as undeliverable, or click **Cancel** to exit.

Change Defer To Date*

	These steps demonstrate how to change the deferral date for several people. The new date should match the first orientation date of the next term of service.
1.	After logging into the program, click the Pool Module icon.
2.	Click the **Pool** menu item.
3.	Click the **Deferral Maintenance** menu item. The Deferral Maintenance screen will appear with a list of people and their deferral dates.
4.	Click in the **Tag** column of each person who will be given a new deferral date.
5.	Click the **Accept** button after tagging the needed people.
6.	Click **Yes** in the Option dialog box which displays.
7.	Click the **Date** button in the Deferral dialog box which appears.
8.	Click the calendar button to the right of the **Defer To** field to select the new deferral date.
9.	Review the new date and click the **Accept** button.
10.	Click **Exit** to close the Deferral Maintenance screen. The Pool Maintenance window will appear.

*Video demonstration available at http://courts.arkansas.gov

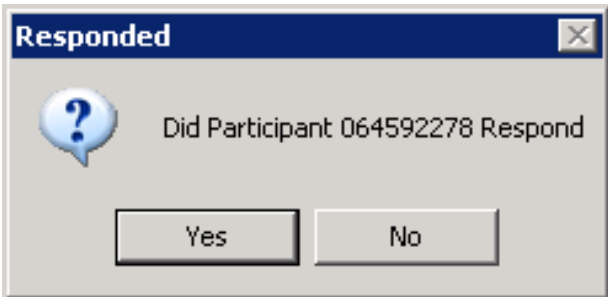## Change Status from Permanently Disqualified to Responded

	This guide outlines how to change a permanent disqualification status to a responded status. These steps can also be followed to delete other types of disqualifications. Note: Skip Step 6 when deleting disqualifications other than permanent (deceased).
1.	After logging into the program, click the Pool Module icon.
2.	Click the **Edit** button (yellow hand). The **Pool Member Search** screen will appear.
3.	Enter the person's **Last Name, First Name** or **Participant Number**.
4.	Click **Accept**. Their **Participant Record** will display.
5.	Click the **Disqual** button. The **Disqualify** screen will appear.
6.	Uncheck the **Permanently Disqualify** checkbox.
7.	Click the **Delete** button. The participant record will display.
8.	The person's status is now Responded. Click the small black **X** to save and close the record, or click the **Search** button. Note: Clicking the Search button automatically saves any changes and closes the participant record.
9.	Click **Yes** to confirm the changes. The Search By Name screen will appear.

Change Status from Excused to Attended

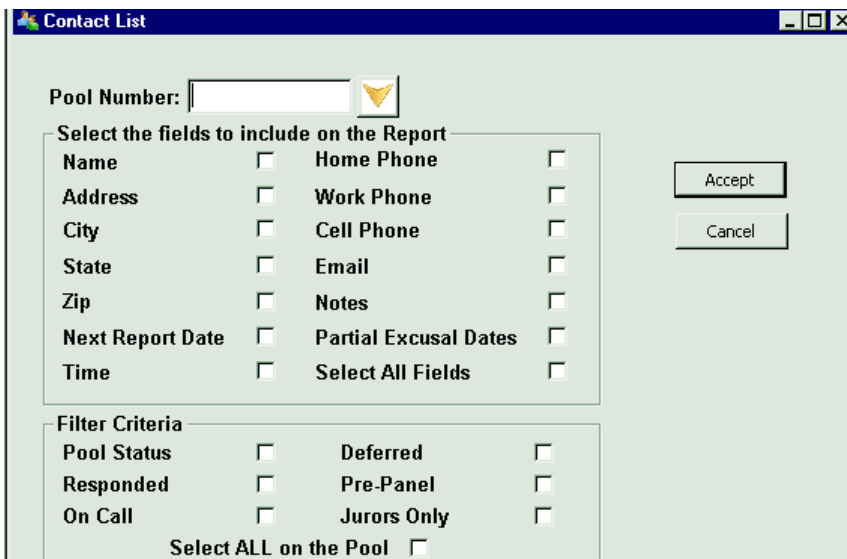|	
1.	After logging into the program, click the Pool Module icon.
2.	Click the **Edit** button (yellow hand). The **Pool Member Search** screen will appear.
3.	Enter the person's **Last Name, First Name** or **Participant Number**.
4.	Click **Accept**. Their **Participant Record** will display.
5.	Click the **Excuse** button. The **Excuse** screen will appear.
6.	Click the **Delete** button to delete the excuse. The participant record will appear.
	The person's status is now Responded, and they are ready to be attended. However, the record must be saved and closed first.
7.	Click the small black **X** to save and close the record, or click the **Search** button. Note: Clicking the Search button automatically saves any changes and closes the participant record.
8.	If the small black **X** was clicked, click **Yes** to confirm the changes. The Search By Name screen will appear.
9.	Enter the *same* person's **Last Name, First Name** again and click **Accept**.
10.	Click the **Scan In** button. Notice the time to the right of the **Room** field. This person is now attended and ready to be used.
11.	Repeat Step 7 to save and close the record.

Change Status from Undeliverable to Responded

	A new feature in Version 11 is the ability to mark one person at a time as undeliverable in their participant record. • The button reads **Undeliv** while a pool member's status is <u>NOT</u> undeliverable. • The button will change to read **DelUndel** when the person's status <u>IS</u> undeliverable. These steps outline how to change a status from Undeliverable to Responded.
1.	After logging into the program, click the Pool Module icon.
2.	Click the **Edit** button (yellow hand). The **Pool Member Search** screen will appear.
3.	Enter the person's **Last Name, First Name** or **Participant Number**.
4.	Click **Accept**. The **Participant Record** will display.
	Because this person's status is **Undeliverable**, the **Undeliv** button has toggled to read **DelUndel**. This means "delete undeliverable."
5.	Click the **DelUndel** button.
6.	A message box will appear asking if the participant responded. Click **Yes**.
7.	This person's status has now changed to **Responded**, and the **DelUndel** button has toggled back to read **Undeliv**. <u>Note</u>: When the Undeliv / DelUndel button is used, the change is saved automatically.
8.	Click the small black **X** or **Search** button to close the record. The Search By Name screen will appear.

Remove FTA Status to Excuse Pool Member

		When a pool member has a FTA status, they cannot be excused through the normal process. These steps outline how to remove the FTA status and then excuse the individual.
1.		After logging into the program, click the Pool Module icon.
2.		Click the **Edit** button.
3.		Enter the person's **Participant Number** or **Last Name, First Name**.
4.		Click **Accept**. The Participant Record will open.
5.		Click the arrow to the right of the **FTA Status** box.
6.		Scroll up and click the word **None**. The FTA status is now displayed as None.
7.		Click the **Excuse** button. The Excuse Dialog Box will open.
8.		Click the arrow to the right of the **Code** box and select the excuse reason. (Check the box for **Excused Letter** if the program is used to print form letters notifying pool members the excuse has been granted.)
9.		Click the **Excuse** button. The dialog box will close and the Participant Record will display.
10.		Review the person's **Status** – it is now Excused.
11.		Click the small black **X** to save and close the record, or click the **Search** button. Note: Clicking the Search button automatically saves any changes and closes the participant record.
12.		Click **Yes** in the Data Changed Message Box. The **Search By Name** screen will appear.
13.		Enter another participant number or name, or click **Cancel** to close the screen. The Pool Maintenance window will appear.
Note:		A Pool Excused/Disqualified Report lists pool members who have been excused or disqualified. The report is sorted by excuse and/or disqualification. To view the report: go to the Pool Module > click Reports > click Excused List > select a Pool > click Accept. The report will appear and can be printed.

Contact Report*

	A new feature in Version 11 is the ability to create and print a contact report by pool number. This report could also be considered a call list or sheriff's list. The following steps outline how to create and print the Contact Report.
1.	After logging into the program, click the Pool Module icon.
2.	Click the **Reports** menu item.
3.	Click **Contact Report** (near the bottom). The Contact List screen will open.
4.	Click the arrow to the right of the **Pool Number:** field to view a list of pools, and double click the needed pool number.
5.	Check the box for each field you want displayed on the report, or check the **Select All Fields** box to include everything. If a box is unchecked, that field's information will not display on the report. Note: All information is pulled from participant records.
6.	In the **Filter Criteria** section, check the box for the status of pool members to include, or check **Select ALL on the Pool** to include everyone. (i.e., if Pre-Panel is the only box checked, only people on a pre-panel will appear on the report.)
7.	Click **Accept**. An alphabetical list of pool members meeting the Filter Criteria is displayed. The list can be sorted in a different order if needed.
8.	Click **Accept** to view the Contact Report.
9.	Click **Print** to print the report.
10.	Click **Cancel** to close the screen. The Pool Maintenance window will appear.

*Example of report on back

Jurisdiction: CIRCUIT
Type: PETIT
Location: ELM COUNTY CIRCUIT COURT

Pool Contact Report
Pool: 998090204
Regular Pool

Summons Date: 02/17/09

Date: 2/18/09
Time: 10:14 AM

Part No	Seq.	Name	City	State	Zip	Home Phone	Work Phone	Cell	Email	Return Date
027105297	04-0023	ABERNATHY, FLOYD D	LIME	AR	72150	501-777-8888	501-222-3333	501-456-4564	floyd@somewhere.com	02/17/09
		Address: 229 GOLDEN RD								
		Exempt: 02/23/09 02/24/09								
		Notes: Two day vacation at end of February								
001484347	04-0034	ALLEN, CHRISTOPHER N	MANGO	AR	72315	870-532-0012	- -	- -		02/17/09
		Address: 1005 HEATHERDOWN TRL								
		Notes: Persons to Attend test								
001153823	04-0037	ALVERSON, JUDY N	STRAWBERRY	AR	72015	847-609-6	- -	- -		02/17/09
		Address: 1311 CHESTNUT ST								
		Notes:								
001613596	04-0003	ANTHONY, CHARLES R	FIG	AR	72454	501-888-8888	501-999-9999	501-444-7777	charles@there.com	02/17/09
		Address: 238 CHRISTOPHER CV #8								
		Notes:								
000258706	04-0048	BALLOW, ANGENITA M	BANANA	AR	71753	870-901-6475	- -	- -		02/17/09
		Address: 74 S CIRCLE DR								
		Notes:								
001824801	04-0052	BANKS, JUDY G	CHERRY	AR	72401	932-199-6	- -	- -		02/17/09
		Address: 403 W CENTRAL AVE								
		Notes: Persons to Attend test								
000233883	04-0051	BARBER, CLARISSA A	HUCKLEBERRY	AR	71667	870-357-2015	- -	- -		02/17/09
		Address: 1115 NORTH DRIVE								
		Notes:								

Pool Selection List (Report)*

	The Pool Selection List is the first report under the Reports menu item in the Pool Module. It is the report which prints after creating a pool. It can be used for calling roll at orientation, sorting by birthdates (to exclude people over 90 from service), etc. The information included in the report is: • Participant Number · Initial Appearance Date • Pool Sequence Number · Voter Registration Number • Name · Date of Birth • City Note: The Pool Selection List is a static (does not change) report.
1.	After logging into the program, click the Pool Module icon.
2.	Click the **Reports** menu item.
3.	Click **Pool Selection List** – the first item under the **Reports** menu.
4.	Click the arrow to the right of the **Enter Pool No.** field to view a list of pools, and double click the needed pool number.
5.	Click **Accept**. A preview of the Pool Selection List (Report) will display. The report is sorted in pool sequence number order.
6.	To change the sort order, click the **Sort** button. The **Specify Sort Columns** dialog box will appear.
7.	To sort by birthdates, scroll down the **Source Data** column on the left until **pool_dob** (date of birth) is visible. Left click **pool_dob** and drag it to the right column and release. Note: The report can be sorted by any of the fields from the **Source Data** column by clicking and dragging the field to the right column.
8.	To also sort in alphabetical order, scroll up the **Source Data** column until **pool_lname** (last name) is visible. Left click **pool_lname** and drag it to the right column and release. Note: Sorting by more than one column is known as 'stack' sorting. Stack sorting can be used whenever there is a **Sort** button in the program.
9.	Click **OK**. The report will be displayed in the new sort order.
10.	Click **Print**. The first printer dialog box will appear.
11.	Click **OK**. A second printer dialog box will appear.
12.	Choose the printer options and click **OK**. The report is displayed while it prints.
13.	Click **Close**. The Pool Maintenance window will appear.

*Example of report on back

Jurisdiction: **CIRCUIT**

Type: **PETIT**

Pool Type: **Regular Pool**

Pool Selection Report

Pool: 998090204

Judge : HERBERT WRIGHT - DIV 4

Summons Date: **02/17/2009**

Todays Date: **2/18/09**

Time: **10:15 AM**

Location: **ELM COUNTY CIRCUIT COURT**

Part No		Name	City/Municipality	Initial Appearance Date	Voter Reg No	DOB
027105297	04-0023	ABERNATHY, FLOYD D	LIME	02/17/2009		09/26/1961
001484347	04-0034	ALLEN, CHRISTOPHER N	MANGO	02/17/2009	3200569	07/14/1988
001153823	04-0037	ALVERSON, JUDY N	STRAWBERRY	02/17/2009	2370348	08/05/1946
001613596	04-0003	ANTHONY, CHARLES R	FIG	02/17/2009	1196392	09/09/1959
000258706	04-0048	BALLOW, ANGENITA M	BANANA	02/17/2009	1894188	08/01/1965
001824801	04-0052	BANKS, JUDY G	CHERRY	02/17/2009	1088199	11/07/1953
000233883	04-0051	BARBER, CLARISSA A	HUCKLEBERRY	02/17/2009	2438595	05/26/1979
042105638	04-0080	BENNETT, BILL E	OAK CITY	02/17/2009		01/01/1958
056119790	04-0020	BONDS, STACY Y	BLUEBERRY	02/17/2009		06/04/1985
000613285	04-0067	BORDEN, MILINDA L	MACADAMIA	02/17/2009	984064	02/21/1945
000792313	04-0098	BRADLEY, LANCE C	APPLE	02/17/2009	1849418	09/12/1979
001615491	04-0060	BRAY, DEBORAH G	BLACKBERRY	02/17/2009	1191104	08/07/1969
068115763	04-0058	BULLOCK, WENDI	GRAPEFRUIT	02/17/2009		11/12/1966
000708482	04-0036	BUSHONG, ROBERT L	CHESTNUT	02/17/2009	2624512	07/05/1941
282015997	04-0050	CAINE, MILDRED J	FIG	02/17/2009		10/02/1934
000279963	04-0049	CALLICOT, LINDA L	TOMATO	02/17/2009	1881261	12/20/1938
058635922	04-0087	CLARK, LINDA M	LEMON	02/17/2009		06/09/1953
062100666	04-0039	COLE, EARL W	KIWI	02/17/2009		11/19/1947
001339299	04-0044	COLLINS, ANGELA C	CHERRY	02/17/2009	738296	03/27/1977
001305065	04-0021	CROW, ABBIE	APPLE	02/17/2009	744608	07/13/1984
001836877	04-0028	DAVIS, TENICKEO L	RASPBERRY	02/17/2009	2987427	05/24/1982
022570063	04-0097	DOUGLASS, BENETTE L	OAK CITY	02/17/2009		07/13/1964
000075874	04-0096	DRIVER, JAMES A	RASPBERRY	02/17/2009	23567	09/29/1926
000705149	04-0040	DUMAS, PAMELA L	LIME	02/17/2009	3195153	08/02/1973
003126722	04-0057	EVANS, DONNIE G	MANGO	02/17/2009		11/15/1951
000784045	04-0084	EVANS II, JANET M	UGLI	02/17/2009	2881698	05/11/1965
034106254	04-0065	FIGUEROA, ANGEL I	UGLI	02/17/2009		08/01/1958
000259588	04-0004	FRASCA, CONNIE M	APRICOT	02/17/2009	1897765	10/23/1966
000784922	04-0005	FRAZIER, DEBORAH L	MANGO	02/17/2009	2877751	03/11/1960
000671274	04-0075	FREEMAN, JAMES E	CASHEW	02/17/2009	2588357	04/08/1961
679663679	04-0095	FULLER, JANET Z	CHERRY	02/17/2009	679663	08/19/1946
001811367	04-0013	GAIRICH, CLAUD A	CHESTNUT	02/17/2009	1114607	06/04/1935
055103880	04-0082	GARCIA, CORDELIA L	FIG	02/17/2009		09/16/1937
023165738	04-0033	GARDNER, RANDALL L	PLUM	02/17/2009		06/07/1959
023136855	04-0063	GOINGS, GEORGE S	PEACH	02/17/2009		10/17/1955
003125788	04-0055	GOODEN, JAMES A	TOMATO	02/17/2009		08/19/1948
000844108	04-0102	HARRIS, ABEL B	KUMQUAT	02/17/2009	642339	02/03/1955
000200096	04-0085	HARVEY, CARL E	CHESTNUT	02/17/2009	1936185	04/25/1966
001310728	04-0089	HAZELWOOD, TERESA L	CANTALOUPE	02/17/2009	808280	04/06/1958
003119696	04-0019	HEGGIE, JACOB W	APPLE	02/17/2009		01/11/1940
001329899	04-0088	HIGGINS, TODD W	HUCKLEBERRY	02/17/2009	701247	11/23/1967
000709778	04-0007	HOMEWOOD, SUSAN H	PEANUT	02/17/2009	2569419	07/26/1954
023156256	04-0061	HUDSON, DEBORAH D	FIG	02/17/2009		10/28/1982
000998121	04-0071	HUTSON, SUZANNE C	BLUEBERRY	02/17/2009	1012750	08/25/1950
065104848	04-0042	JIMMERSON, DONNIE E	PECAN	02/17/2009		08/29/1962
001158696	04-0038	JOHNSON, PAMELA R	PEAR	02/17/2009	2357758	05/15/1969
043140291	04-0073	JOHNSON, MICHAEL J	CASHEW	02/17/2009		12/25/1979
282006475	04-0016	JORDAN, RANDY W	UGLI	02/17/2009		04/15/1959
018399527	04-0026	JOYNER, FRED G	STRAWBERRY	02/17/2009		02/08/1959
000164257	04-0094	KETCHUM, LOUIS R	GRAPE	02/17/2009	2301684	04/19/1951

Current Status Report*

	The Current Status Report is the second report under the Reports menu item in the Pool Module. It is created by pool number and contains the status of each person as recorded in their participant record. The information included is: • Participant Number • Appearance Date (Next Report Date) • Name • Phone Numbers (if given) • Status • Address
1.	After logging into the program, click the Pool Module icon.
2.	Click the **Reports** menu item.
3.	Click **Current Status** – the second item under the **Reports** menu.
4.	Click the arrow to the right of the **Enter Pool No.** field to view a list of pools, and double click the needed pool number.
5.	Click **Accept**. A preview of the Current Status Report will display.
6.	The report is sorted in last name, first name order. To change the sort order, click the **Sort** button. The **Specify Sort Columns** dialog box will appear.
7.	To sort by status, scroll down the **Source Data** column on the left until **status** is visible. Left click **status** and drag it to the right column and release. The order of statuses will be Pool, Responded, Excused, Disqualified, and Undeliverable. Totals for each status will be displayed on the last page of the report. Note: The report can be sorted by any of the fields from the **Source Data** column by clicking and dragging the field to the right column.
8.	To also sort in alphabetical order, scroll up the **Source Data** column until **lname** (last name) is visible. Left click **lname** and drag it to the right column and release. Note: Sorting by more than one column is known as 'stack' sorting. Stack sorting can be used wherever there is a **Sort** button in the program.
9.	Click **OK**. The report will be displayed in the new sort order.
10.	Click **Print**. The printer dialog box will appear.
11.	Choose the printer options and click **OK**. The report is displayed again while it prints.
12.	Click **Close**. The Pool Maintenance window will appear.

Example of report on back

Jurisdiction: **CIRCUIT**

Type: **PETIT**

Location: **ELM COUNTY CIRCUIT COURT**

Current Pool Status Report
Pool: 998090204
Judge : HERBERT WRIGHT - DIV 4

Date: **02/18/09**

Time: **10:14 AM**

Summons Date: **02/17/09**

Part No	Name	Status	Appearance	Phone	
027105297 04-0023	**ABERNATHY, FLOYD D** 229 GOLDEN RD LIME, AR 72150	Responded	02/17/09	Home: 501-777-8888 Work: 501-222-3333 Cell: 501-456-4564	local:
001484347 04-0034	**ALLEN, CHRISTOPHER N** 1005 HEATHERDOWN TRL MANGO, AR 72315	Responded	02/17/09	Home: 870-532-0012 Work: - - Cell: - -	local:
001153823 04-0037	**ALVERSON, JUDY N** 1311 CHESTNUT ST STRAWBERRY, AR 72015	Responded	02/17/09	Home: 847-609-6 Work: - - Cell: - -	local:
001613596 04-0003	**ANTHONY, CHARLES R** 238 CHRISTOPHER CV #8 FIG, AR 72454	Responded	02/17/09	Home: 501-888-8888 Work: 501-999-9999 Cell: 501-444-7777	local:
000258706 04-0048	**BALLOW, ANGENITA M** 74 S CIRCLE DR BANANA, AR 71753	Responded	02/17/09	Home: 870-901-6475 Work: - - Cell: - -	local:
001824801 04-0052	**BANKS, JUDY G** 403 W CENTRAL AVE CHERRY, AR 72401	Panel	02/17/09	Home: 932-199-6 Work: - - Cell: - -	local:
000233883 04-0051	**BARBER, CLARISSA A** 1115 NORTH DRIVE HUCKLEBERRY, AR 71667	Responded	02/17/09	Home: 870-357-2015 Work: - - Cell: - -	local:
042105638 04-0080	**BENNETT, BILL E** 56 MCKENZIE COVE OAK CITY, AR 72855	Panel	02/17/09	Home: - - Work: - - Cell: - -	local:
056119790 04-0020	**BONDS, STACY Y** 47 FLEMING BLUEBERRY, AR 72472	Responded	02/17/09	Home: 501-555-5555 Work: - - Cell: 501-666-4455	local:
000613285 04-0067	**BORDEN, MILINDA L** 161 SFC 363 MACADAMIA, AR 72501	Panel	02/17/09	Home: - - Work: - - Cell: - -	local:
000792313 04-0098	**BRADLEY, LANCE C** 1112 N 9TH ST APPLE, AR 71822	Panel	02/17/09	Home: 870-898-4664 Work: - - Cell: - -	local:
001615491 04-0060	**BRAY, DEBORAH G** 816 WOODALE BLACKBERRY, AR 72461	Panel	02/17/09	Home: - - Work: - - Cell: - -	local:
068115763 04-0058	**BULLOCK, WENDI** 3581 HWY 26 W GRAPEFRUIT, AR 72542	Panel	02/17/09	Home: - - Work: - - Cell: - -	local:
000708482 04-0036	**BUSHONG, ROBERT L** 8 ROCKYTOP RD CHESTNUT, AR 71603	Responded	02/17/09	Home: - - Work: - - Cell: - -	local:

Available List (Pool Available Report)*
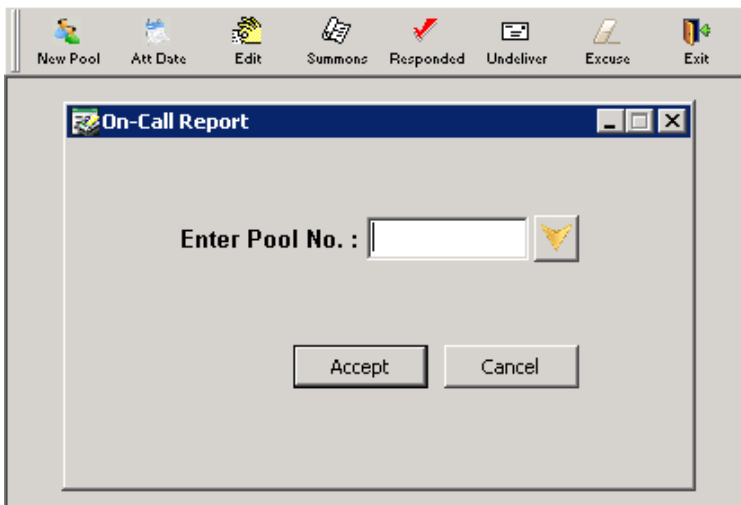
	The Available List (Pool Available Report) is the third report under the Reports menu item in the Pool Module. It is created by pool number <u>or</u> next attendance date. It can be used for calling roll and given to attorneys prior to trial. The information included is: • Participant Number • Occupation (Partials) • Pool Sequence Number (Random Number) • Age • Name • On Call • Status <u>Note</u>: If a pool member has any **partial excuse dates**, they will be displayed in the Occupation column of this report.
1.	After logging into the program, click the Pool Module icon.
2.	Click the **Reports** menu item.
3.	Click **Available List** – the third item under the **Reports** menu.
4.	To create by pool number, click the arrow to the right of the **Pool Number** field to view a list of pools, and double click the needed pool number. To create by next attendance date, click the calendar to the right of the **Enter Next Attendance Date** field. Select the month, year, and date needed.
5.	The report has three filtering options in the **Criteria** section. Place a check mark in any of the filtering boxes needed or leave all boxes unchecked. • Include Participants on Call (includes any pool members with a 00/00/0000 next report date) • Responded Participants Only (includes <u>only</u> pool members with a responded status – excludes people with pool status) • Include Panel Members (includes pool members already on a panel)
6.	The default **Sort Order** is last name. This is the best option if giving the report to attorneys or using to call roll.
7.	Click **Accept**. A preview of the Available List (Pool Available Report) will display.
8.	Click **Print**. The first printer dialog box will appear.
9.	Click **OK**. The second printer dialog box will appear.
10.	Choose the printer options and click **OK**. The report is displayed again while it prints.
11.	Click **Close**. The Pool Maintenance window will appear.

Example of report on back

Jurisdiction: **CIRCUIT**

Location: **ELM COUNTY CIRCUIT COURT**

POOL Available Report

Date: **2/18/09**

Time: **10:09 AM**

Reporting Date : **02/17/09**

Part No	Name	Status	Occupation	Age	On Call
027105297 04-0023	ABERNATHY, FLOYD D	Pool		47	N
001484347 04-0034	ALLEN, CHRISTOPHER N	Responded		20	N
001153823 04-0037	ALVERSON, JUDY N	Responded		62	N
001613596 04-0003	ANTHONY, CHARLES R	Responded		49	N
000258706 04-0048	BALLOW, ANGENITA M	Responded		43	N
001824801 04-0052	BANKS, JUDY G	Panel		55	N
000233883 04-0051	BARBER, CLARISSA A	Responded		29	N
042105638 04-0080	BENNETT, BILL E	Panel		51	N
056119790 04-0020	BONDS, STACY Y	Responded		23	N
000613285 04-0067	BORDEN, MILINDA L	Panel		63	N
000792313 04-0098	BRADLEY, LANCE C	Panel		29	N
001615491 04-0060	BRAY, DEBORAH G	Panel		39	N
068115763 04-0058	BULLOCK, WENDI	Panel		42	N
000708482 04-0036	BUSHONG, ROBERT L	Responded		67	N
282015997 04-0050	CAINE, MILDRED J	Responded		74	N
000279963 04-0049	CALLICOT, LINDA L	Responded		70	N
058635922 04-0087	CLARK, LINDA M	Panel		55	N
062100666 04-0039	COLE, EARL W	Responded		61	N
001339299 04-0044	COLLINS, ANGELA C	Responded		31	N
001305065 04-0021	CROW, ABBIE	Responded		24	N
001836877 04-0028	DAVIS, TENICKEO L	Responded		26	N
022570063 04-0097	DOUGLASS, BENETTE L	Panel		44	N

Print the On-Call Report

		When a pool member is "on call," their participant record has <u>no</u> Next Report Date (00/00/0000). For courts that send a letter or call people when a trial is on go, printing and using this report can be helpful.
	1.	After logging into the program, click the Pool Module icon.
	2.	Click the **Reports** menu item.
	3.	Click **On-Call Report** (the 9th item on the list). The On-Call Report dialog box will appear.
	4.	Click the arrow to the right of the **Enter Pool No** field to view a list of pools, and double click the needed pool number.
	5.	Click **Accept**. The report will open.
	6.	Review the report if needed and click **Print**.
	7.	Click **Accept**. The printer's dialog box will open.
	8.	Click **OK** twice and the report will print.
	9.	Click **Close** to close the report. The Pool Maintenance window will appear.

*Example of report on back

Jurisdiction: **CIRCUIT**

Date: **11/19/09**

Type: **PETIT**

Judge : CIRCUIT JUDGE

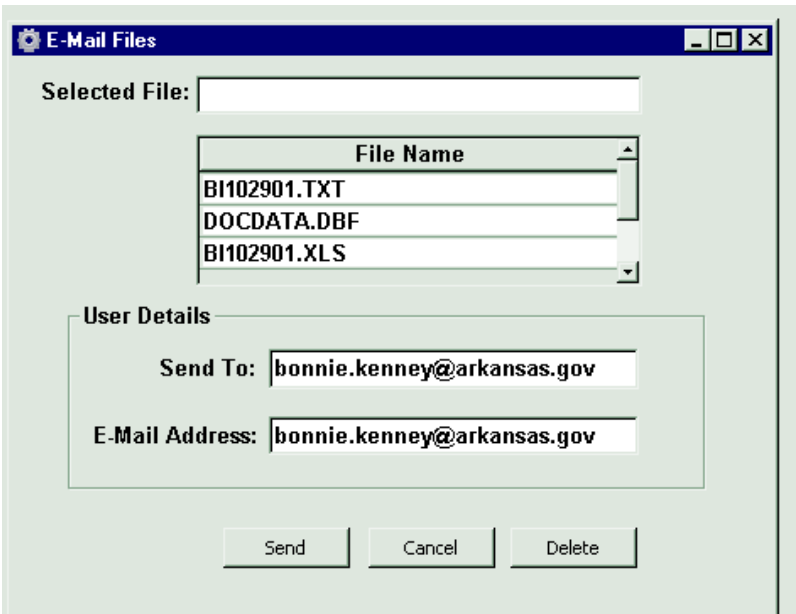Time: **11:04 AM**
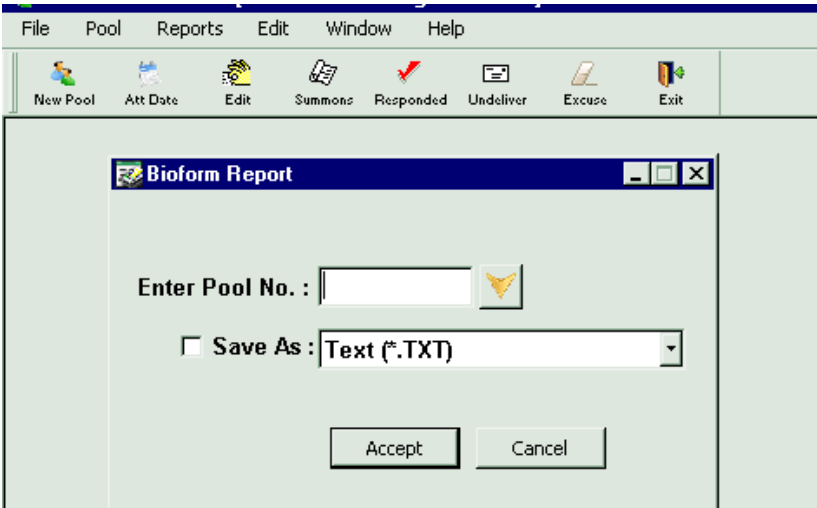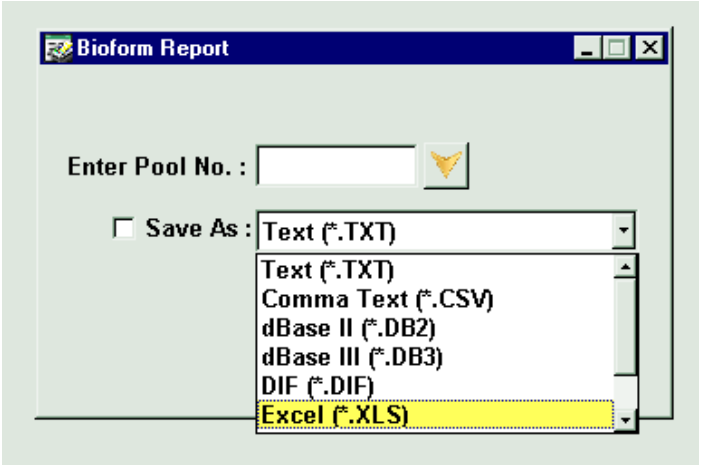
Location: **CEDAR COUNTY CIRCUIT COURT**

Original Report Date: **10/26/2009**

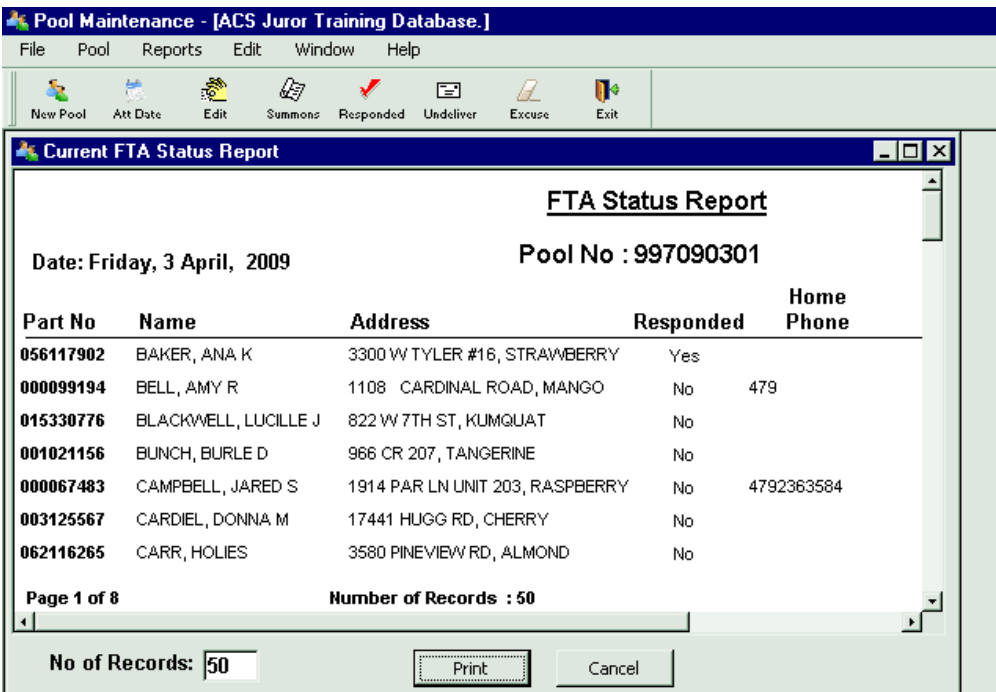| Part No	Name	Phone Number	Comment
001187765 01-0009	RITCHIE, KENNETH G 86 KENMAR LN WALNUT, AR 72944-3732	479-928-0100	
001187169 01-0021	ROBERTSON, LEWIS W 4255 KEENER LN LEMON, AR 72833-6154	501-637-4636	
001189654 01-0006	SIMPSON, JOAN L 1307 N 20TH ST RASPBERRY, AR 72958-0481		
064591218 01-0003	WATKINS, CAROL A 1366 MILLER COUNTY 41 NECTARINE, AR 7295		
064588893 01-0002	WESTON, PAUL A 705 HILL RD KUMQUAT, AR 72944-3243		
064592165 01-0014	WILEY, MARY M 960 MIDWAY RT TOMATO, AR 72958-7637		

Total pool members on call: 26

Create a Bioform Spreadsheet and Email
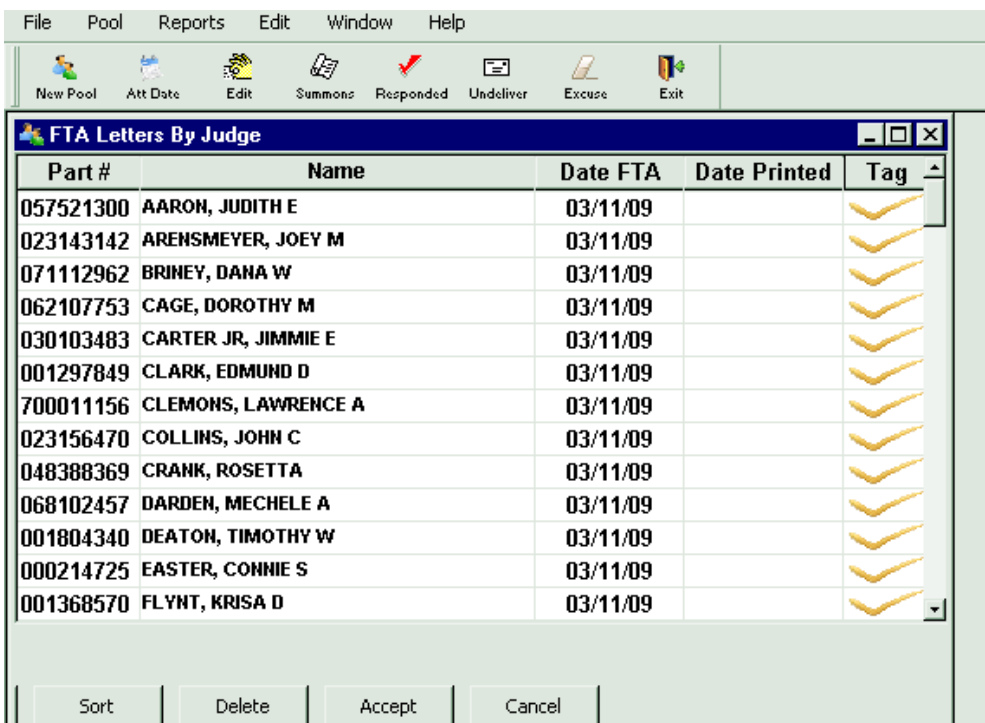
	These steps outline how to create a spreadsheet of a pool's Bioforms. The file can then be emailed through the Utility Module to the email address recorded in the Juror Program. Note: If Bioform information has not been entered for any of the pool members, the report will be blank.
1.	After logging into the program, click the Pool Module icon.
2.	Click the **Reports** menu item.
3.	Click **Bioform** (4th from the bottom of the **Reports** menu). The Bioform Report dialog box will open.
4.	Click the arrow to the right of the **Enter Pool No.** field and double click the needed pool number.
5.	Check the **Save As** checkbox.
6.	The default file format is **Text**. Click the arrow to select the spreadsheet format.

	7.	Click the **Accept** button. The File Export Complete dialog box will appear.
	8.	Click **OK**.
	9.	Exit the Pool Module.
	10.	Click the Utilities Module button.
	11.	Click the **Utilities** menu item.
	12.	Click **E-Mail** (last item on the **Utilities** menu). The E-Mail Files dialog box will appear.
	13.	In the **File Name** section of the screen, double click the file created in Step #6. Bioform files will begin with **BI** and then the date the file was created.
	14.	Click the **Send** button. The file will be emailed to the address listed.
	15.	Click **OK** in the message box which appears. The Utilities main window will appear.
	16.	Exit the Juror Program and go to your email account to open the email containing the file.
	17.	Right click the attachment and select **Save Target As**. This will save the file to your computer.
	18.	Go to where the file is saved and double click to open it.

Printing the FTA Report and Letters*

	These steps illustrate how to print a FTA Report by pool. The following fields are included on the report: • Participant Number • Responded – Yes / No • Name (last name, first name) • Home / Work Phone Numbers • Address • Age The steps for printing FTA Letters by Judge begin on the second page. These letters can be printed for one person or several people.
1.	After logging into the program, click the Pool Module icon.
2.	Click the **Reports** menu item.
3.	Go to **FTA Status Reports** – the 4th item from the bottom on the **Reports** menu.
4.	Click **FTA Status**. The Current FTA Status Report screen will appear.
5.	Click the arrow to the right of the **Pool Number** field to see a list of pools, and double click the needed pool number.
6.	Click **Accept**. A list of any members in the selected pool with a FTA count of one or more will appear.
7.	To print the report, click **Print**.
8.	To close the **Current FTA Status Report** screen, click **Cancel**. The Pool Maintenance window will appear.

*Examples of report and letter on back

	Print FTA Letters by Judge
1.	In the Pool Maintenance window, click **Reports**.
2.	Go to **Documents** – the 3rd item from the bottom on the **Reports** menu.
3.	Go to **FTA Letters** – half way down the **Documents** sub menu.
4.	Click **By Judge**. A Delete message box will appear.
5.	Click **Yes** for the "Remove Records That Were Printed Previous" statement. Clicking **Yes** removes the names of anyone who has already had a letter printed. Printing a letter does not change the person's FTA count.
6.	A list of people in any active pool with a FTA count of one or more will appear.
7.	Everyone with a check mark in the **Tag** column will have a letter printed. To remove the check mark, click in the **Tag** column across from the person's name.
8.	Click **Accept**. The **Respond By Date / Time** dialog box will appear.
9.	Click the calendar to select the month, year and date. This date represents the deadline to contact the court and explain the absence.
10.	The **Respond Time** is 2:00 pm by default. Enter a different time if needed.
11.	Click **Accept**. The printer's dialog box will appear. Click **OK** to print.

Examples of report and letter on back

FTA Status Report

Pool No : 997090301

Part No	Name	Address	Responded	Home Phone	Works Phone	Ext.	Age
056117902	BAKER, ANA K	3300 W TYLER #16, STRAWBERRY	Yes				32
000099194	BELL, AMY R	1108 CARDINAL ROAD, MANGO	No	479			41
015330776	BLACKWELL, LUCILLE J	822 W 7TH ST, KUMQUAT	No				91
001021156	BUNCH, BURLE D	966 CR 207, TANGERINE	No				72
000067483	CAMPBELL, JARED S	1914 PAR LN UNIT 203, RASPBERRY	No	4792363584			23
003125567	CARDIEL, DONNA M	17441 HUGG RD, CHERRY	No				75
062116265	CARR, HOLIES	3580 PINEVIEW RD, ALMOND	No				68
018417735	CLARK, PATRICIA S	P O BOX 8, PEACH	No				60
000709137	COLE, SHEILA D	1020 COLUMBIA, GRAPE	No	8708506821			38
023134438	CUCCIA, BETTY I	P O BOX 2341, RASPBERRY	No				67
022564179	DULANEY, DEDRA	433 E COOK ST, DATE	No				34
039103138	ELAM, RICKY	955 RAMBLE LN, APPLE	No				51
000947264	ELDRIDGE, RONNIE H	485 HWY 75, LIME	No				61
018399141	EPPERSON, AUBREY B	29 FLINTSTONE LN, POMEGRANATE	No				53
001158075	FOTI, CLYDE O	1 N SCHOOL AVE UNIT 1209, CASHE	No	5018606817			89
018431198	FRY, VALERIE M	PO BOX 1553, GRAPEFRUIT	No				38
000198100	HACKEY, CARL D	392 THREE FORKS APT 4, KIWI	No				24
069953854	HARPER, CLIFFORD D	HC 71 BOX 239-A, NECTARINE	No				72
019991655	HARRELL, LUCILLE F	103 MORNINGSIDE DR, LEMON	No				82
001357738	HART, MICHELLE M	39 CR 375, MANGO	No				46
003109842	HENRY, IRENE M	132 MHOON ROAD, LEMON	No				69
000946047	HOGAN, BETTY A	5410 SUMMER PLACE, BANANA	No				72
000164021	KNOWLTON JR, LENARD	P O BOX 157, PLUM	No				73
071105003	LOVELL, JACQUELINE J	567 HOPEWELL RD, PECAN	No				66
057527255	MARTIN, NANCY A	P.O. BOX 425, POMEGRANATE	No				87
057524020	MARTIN, WILLIAM T	1905 AVE 4 PL NE, APPLE	No				84
056109955	MCCAIN, MARION J	122 PINE WOOD DRIVE, HUCKLEBE	No				69
000627429	MCCLUSKEY, BRANDY L	18 DELAVEGA CIR, STRAWBERRY	No				36
023166104	MCMANIS, NICOLE L	19 ARKLA DOCK RD, PEANUT	Yes				29
024980621	MITCHELL JR, RONNIE A	1605 W 12TH AVENUE, CANTALOUPI	No				58
018400696	MOORE, CAROL	401 E GARLAND, GRAPE	No				55
023167425	MYRICK, BRADLEY R	50 BLUEBELL DR, DATE	No				27
074374763	NEAL, MILBURN	P O BOX 383, MACADAMIA	No				69
069951455	PARKER, KEITH D	729 CR 1780, KUMQUAT	No				37
000942501	PRICE, EDITH F	311 N CENTER, FIG	No				88
000934709	SCHLAFER, DORIS F	347 HILLCREST STREET, ORANGE	No	8708366459			60
282031827	SCRIBNER, SHELLEY M	P O BOX 168, BLUEBERRY	No				53
001470749	SMITH, MICHELLE I	1003 GILLISON DRIVE, GRAPE	No				27
018395972	STINGLEY, WILLIAM C	209 S LAUREL, BLUEBERRY	No				30
001260558	THOMAS, SUE O	430 SFC 555, CASHEW	No				63
024979774	TURNER, LEON J	9106 MIDDLE WARREN ROAD, UGLI	No				45

April 3, 2009

JOHN C COLLINS
786 HEMPSTEAD 55
NECTARINE, AR 72034

Dear: JOHN C COLLINS

Our records indicate that you were summoned for jury duty on March 11, 2009 in the CEDAR COUNTY CIRCUIT COURT and you were not in attendance.

Furthermore, you have not contacted the court as instructed. By law, sanctions may be imposed if you are instructed to report for jury duty, and do not report, and have not been excused by me.

You must contact this court by Monday, April 20, 2009 at 2:00 PM and explain your absence. If you fail to do so, this court will issue a summons ordering the Sheriff to bring you before the court to appear and show cause why you have not responded.

Please call us at 123-456-7890 to resolve your failure to appear as scheduled at jury orientation.

Sincerely,

CIRCUIT JUDGE
Circuit Judge

cc: Court File

Print Disqualify Letters*

	These are form letters which tell the pool member their request to be disqualified from jury service has been granted.
1.	After logging into the program, click the Pool Module icon.
2.	Click the **Reports** menu item.
3.	Move to the **Documents** item (3rd item from the bottom).
4.	Move to the right and click **Disqualified Letters** (5th item from the top).
5.	A message box will appear asking "Remove Records That Were Printed Previous" – click **No**. (If you are confident that all previous disqualification letters have been sent, click **Yes**.)
6.	The **Disqualified Letters** screen will appear. Any pool member who had the Disqualified Letter box checked when they were disqualified (in their participant record) will be displayed here.
7.	If a letter will be mailed for every person listed, click **Tag All**. If letters will be sent to only selected individuals, click in the **Tag** column for each individual.
8.	After making the selections, click **Accept**. The printer's dialog box will appear.
9.	Make the appropriate selections for the printer and click **OK**. You will be returned to the Pool Maintenance window while the letters print.
Note:	A form letter for each tagged person will print stating "You have been disqualified from jury service. Therefore, you are relieved from serving from (name of the circuit court here). Thank you for responding to the jury summons. If you have any further questions, please contact the court at 123-456-7890."

*Sample letter on back

FEBRUARY 19, 2009

WANDA CANNATELLA
1045 GRAND LAKE LOOP
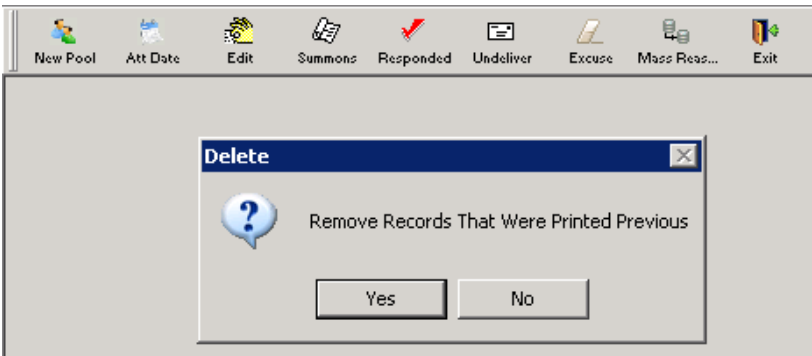ALMOND, AR 72521

Dear WANDA CANNATELLA

You have been disqualified from jury service. Therefore, you are relieved from serving from CEDAR COUNTY CIRCUIT COURT. Thank you for responding to the jury summons.

if you have any further questions, please contact the court at 123-456-7890.

Sincerely,

HON. SEAN CONAFIR
Circuit Judge

Print Excuse Letters*

	These are form letters which tell the pool member their request to be excused from jury service has been granted.
1.	After logging into the program, click the Pool Module icon.
2.	Click the **Reports** menu item.
3.	Move to the **Documents** item (3rd item from the bottom).
4.	Move to the right and click **Excused Letters** (6th item from the top).
5.	A message box will appear asking "Remove Records That Were Printed Previous" – click **No**. Note: If you are confident that all previous excuse letters have been sent, click **Yes**.
6.	The **Excused Letters** screen will appear. Any pool member who had the Excused Letter box checked when they were excused (in their participant record) will be displayed here.
7.	If a letter will be mailed for every person listed, click **Tag All**. If letters will be sent only to selected individuals, click in the **Tag** column for those individuals.
8.	After making the selections, click **Accept**. The printer's dialog box will appear.
9.	Make the appropriate selections for the printer and click **OK**. The Pool Maintenance window will appear while the letters print.
Note:	A form letter for each tagged person will print stating "After reviewing your request to be excused from jury service, this court has determined that you are excused from jury duty."

*Sample letter on back

February 19, 2009

BILLY W MARONAY
PO BOX 448
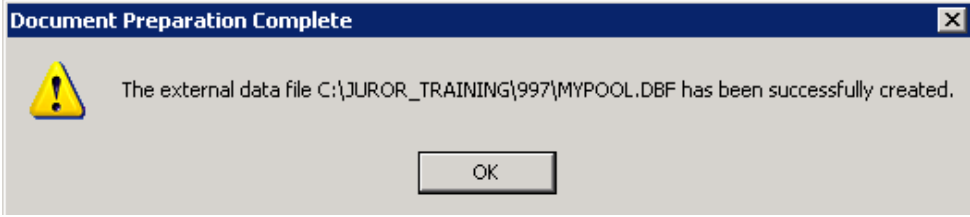RASPBERRY, AR 72450-0000

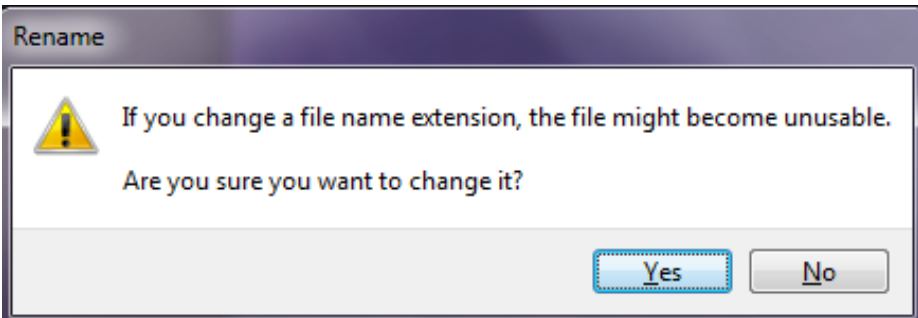Dear: BILLY W MARONAY

After reviewing your request to be excused from jury service, this court has determined that you are excused from jury duty.

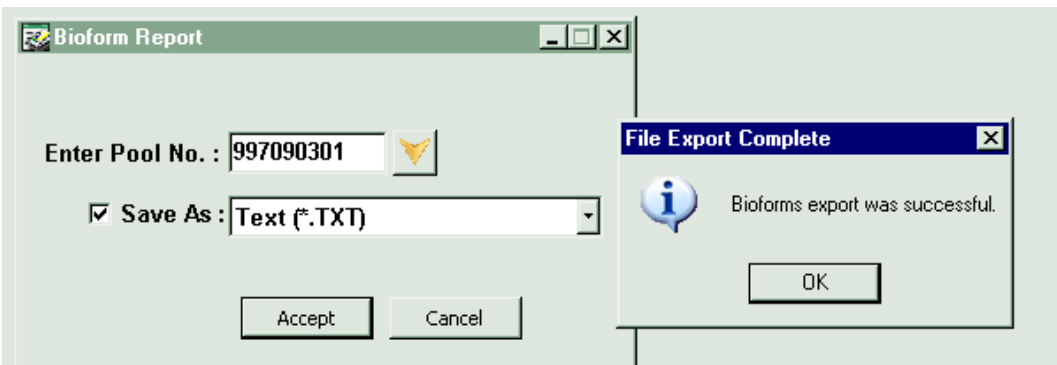Sincerely,

THE CIRCUIT JUDGE
Circuit Judge

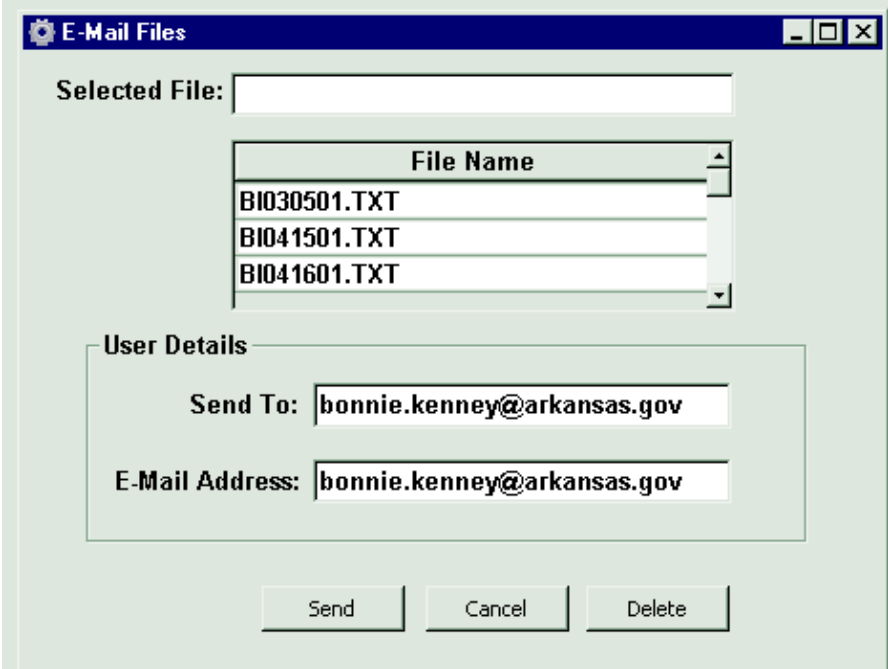## Create a Spreadsheet of the Pool – Doc Prep

	These steps outline how to create a spreadsheet of a pool which includes names, addresses, participant numbers, etc. The file is then emailed through the Utility Module to the email address recorded in the Juror Program.
1.	After logging into the program, click the Pool Module icon.
2.	Click the **Reports** menu item.
3.	Click **Documents** (5th from the bottom of the **Reports** menu).
4.	Click **Document Preparation** (3rd from the top of the **Documents** sub menu). The **Document Production** screen will appear.
5.	Click the arrow to the right of the **Pool Number** field to view a list of pools, and select the needed pool number.
6.	Notice the last part of the file name – **DOCDATA.DBF**. The file name can be changed or left as DOCDATA.DBF. To change the file name, click in the **File Name** field and move the cursor to the far right. Change the file name and review before proceeding. Examples – OCTOBERPOOL.DBF or PANEL1.DBF
7.	Click the **Accept** button. The **Selection Criteria** screen will appear.
8.	Choose all pool members by checking **Select All**. (If only part of the pool is needed in the spreadsheet, check the appropriate boxes.)
9.	Click **Accept**. The **Default Values** screen will appear.
10.	Click **Accept**. The **Document Printing** screen will appear.
11.	To select everyone in the pool, click the **Tag All** button. (If everyone in the pool does not need to be included, click the **Tag** column beside each name which does need to be included.)
12.	Click **Accept**. The **Document Preparation Complete** message box will appear. Document Preparation Complete ✕ ⚠ The external data file C:\JUROR_TRAINING\997\MYPOOL.DBF has been successfully created. OK
13.	Click **OK**. The Pool Maintenance window will appear.
14.	Exit the Pool Module and click the Utility Module icon.
15.	Click the **Utilities** menu item.
16.	Click **Email** (last item). The **Email Files** screen will appear.

17.	Under the **File Name** column, double click the file created in step #6. After clicking, the name of that file will appear in the **Selected File** field.
18.	Verify the email address and click **Send**. A message box will appear indicating the file was sent. E-Mail Files Message Sent OK
19.	Click **OK**. The Utilities main window will appear.
20.	Click **Exit**.
21.	Go to the email account and open the email containing the file.
22.	To save the file to the computer's hard drive, right click the attachment and select **Save Target As**.
23.	Decide where to save the file and click **Save** (or OK, depending on the computer).
24.	Go to where the file has been saved, and look at the file extension. It is **DBF**.
25.	Right click on the name of the file and select **Rename**.
26.	Change the letters **DBF** to **XLS** (Excel spreadsheet format) and press **Enter**. The file should now read YOURFILENAME.XLS.
27.	Click **Yes** if a message box like the one below appears. Rename If you change a file name extension, the file might become unusable. Are you sure you want to change it? Yes No
28.	Double click the file to open it as an Excel spreadsheet.

Send a Text File through Email

	This quick reference guide illustrates how to create a text file of a report and send it in an email. These steps demonstrate the process with the Bioforms in the Pool Module. Note: These steps can also be used for the Pre-Payment Attendances Report (Attend Module) and the Download Accounts Payable Report (Utilities Module).	
1.	After logging into the program, click the Pool Module icon.	
2.	Click the **Reports** menu item.	
3.	Click **Bioform** (next to the last item). The Bioform Report screen will appear.	
4.	Click the arrow to the right of the **Enter Pool No** field to see a list of pools, and click the needed pool number.	
5.	Check the **Save As** check box.	
6.	The default file type choice is **Text (*.TXT)** but there are other options, i.e., **Excel (.XLS)**. For this example, leave the file type as **Text (*.TXT)**.	
7.	Click **Accept**.	
8.	Click **OK** in the File Export Complete dialog box which appears. The Pool Maintenance window will appear. 	
9.	Click **Exit** to leave the Pool Module.	
10.	Click the Utility Module icon. The Utilities window will appear.	
11.	Click the **Utilities** menu item.	

12.	Click **Email** (last item on the list). The **E-Mail Files** screen will appear. ![E-Mail Files screen showing Selected File field, a File Name list containing BI030501.TXT, BI041501.TXT, BI041601.TXT, a User Details section with Send To: bonnie.kenney@arkansas.gov and E-Mail Address: bonnie.kenney@arkansas.gov, and Send, Cancel, Delete buttons]
13.	In the **File Name** list, locate the file exported from the Pool Module. The File Name is formatted as: • Type of File (in this case BI for Bioforms) • Date created (MMDD – in this case 0416 for April 16) • Count of files exported on this date (01 for the first file exported on April 16)
14.	Double click the needed **File Name**. The File Name will appear in the **Selected File** field.
15.	Click **Send**. The file will be emailed to the address listed in **User Details**.
16.	Click **OK** in the E-mail Files dialog box which appears.
17.	Click **Exit** to leave the Utilities Module and return to the Main Menu.