

South Carolina Judicial Department



Court Case Management

Jury Management System

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Important Screen graphics seen in this manual may differ from your computer screen due to different JMS configuration settings.



Section 1:

Pre-Court Date Procedures

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Notes



Lesson 1: Create an Appearance Panel

When first created, an Appearance Panel only stores information about scheduled court dates and the number of jurors needed for the court dates. You create an Appearance Panel as soon as court dates are scheduled. Jurors are randomly selected for a panel when the jurors need to be notified. Appearance Panels are created ahead of time to help re-schedule any jurors that must be transferred to another court date.

Lesson Objectives

- ❖ Create a new Appearance Panel.

Step 1. Access Appearance Panel Wide

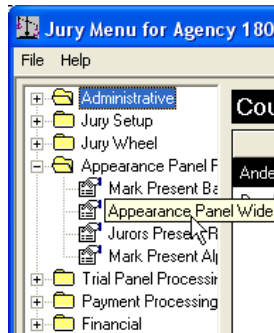


Figure 1.1: Appearance Panel Wide

1. Click the Appearance Panel Processing folder in the Menu Tree.
2. Select Appearance Panel Wide.



Step 2. Create an Appearance Panel

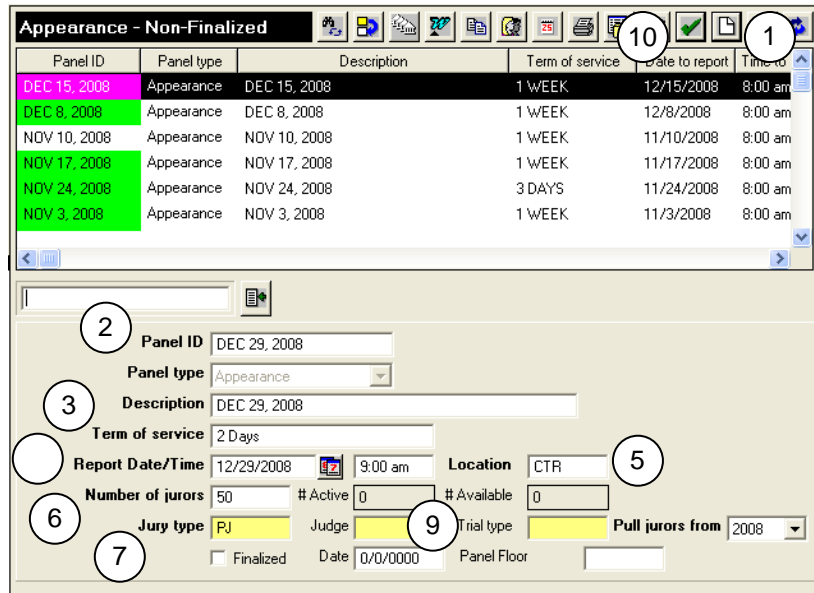


Figure 1.2: New Appearance Panel

1. Click the **New** button to prepare for creating an Appearance Panel.
2. Enter a **Panel ID** of up to fifteen characters and spaces. It is recommended that you use the beginning court service date to identify the panel, such as MAY 26, 2008 or DEC 15, 2008. Note that the **Description** mimics the data typed into the **Panel ID** field. You can change the description if necessary before saving the panel.
3. Enter a **Term of service**, the length of the court dates for this panel, such as 1 WEEK or 3 DAYS.
4. Enter the time and date for the jurors to report to the court. This time and date is used on the summons sent to the jurors.
5. Enter the court **Location**.
6. Enter the **Number of jurors** needed for this juror pool.
7. Double-click in the **Jury type** field to open a Select window that lists all the jury types available for your court.

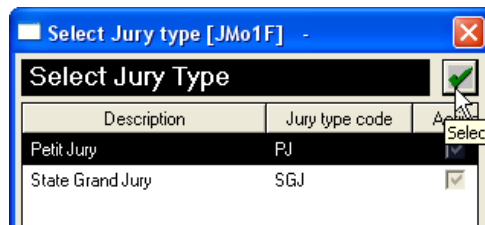


Figure 1.3: Select Jury Type Window

8. Highlight the jury type, and click the **Select** button.
9. Enter the **Judge** or **Trial type**, if known. These are optional entries. Double-click in these fields to open a Select window that lists judges and trial types for your court.



- Click the **Save**  button to save the panel record. It displays in the grid area of the **Appearance Panel Wide** screen.



Panel ID	Panel type	Description	Term of service	Date to report	Time to
DEC 15, 2008	Appearance	DEC 15, 2008	1 WEEK	12/15/2008	8:00 am
DEC 29, 2008	Appearance	DEC 29, 2008	2 Days	12/29/2008	9:00 am
DEC 8, 2008	Appearance	DEC 8, 2008	1 WEEK	12/8/2008	8:00 am
NOV 10, 2008	Appearance	NOV 10, 2008	1 WEEK	11/10/2008	8:00 am
NOV 17, 2008	Appearance	NOV 17, 2008	1 WEEK	11/17/2008	8:00 am
NOV 24, 2008	Appearance	NOV 24, 2008	3 DAYS	11/24/2008	8:00 am
NOV 3, 2008	Appearance	NOV 3, 2008	1 WEEK	11/3/2008	8:00 am

Figure 1.4: Appearance Panel Saved to Grid

Note Color highlights for Appearance Panels in the Panel IDs column indicate that the jurors have not been pulled and sequence numbers have not been assigned for these panels. In the above example, the Nov 10, 2008 panel has had jurors pulled and sequence numbers assigned.

Step 3. Copy an Appearance Panel

If you are creating multiple Appearance Panels that contain the same information, such as report time, report location, and number of jurors, you can copy a panel instead of keying in all the information each time.

- Highlight the **Appearance Panel** you want to copy.
- Click the **Copy**  button.
- Change the necessary information: Panel ID, Description (optional), and Report Date.
- Save with the  button.



Notes



Lesson 2: Pull a Jury, Assign Sequence Numbers, and Print a Summons

When it's time to notify jurors, you will access the Appearance Panel and start the JMS process to randomly select jurors for the panel.

The selection process alphabetizes the selected jurors by name (last, first, middle). Each juror is given a number of 9999 until they are assigned Sequence Numbers. These numbers are used to identify individual jurors. These numbers are also used to create the barcodes for jurors' badges and the Attorney report.

Note A juror should not be transferred to an Appearance Panel with sequence numbers assigned.

Lesson Objectives

- ❖ Search for a panel.
- ❖ Pull jurors for a panel.
- ❖ Assign Sequence Numbers to jurors.
- ❖ Print a Summons for jurors.

Part I. Pull a Jury without a Password

Use these instructions if you are able to pull a jury without the Juror Commissioner or Treasurer being present and without their passwords.

Step 1. Access the Appearance Panel

1. Click to open the Appearance Panel Processing folder on the Menu Tree.
2. Select Appearance Panel Wide.



Step 2. Locate the Panel

If you have entered numerous Appearance Panels, the grid is full, and you can't see the Appearance Pane you want to work with, you can search for the Panel ID.

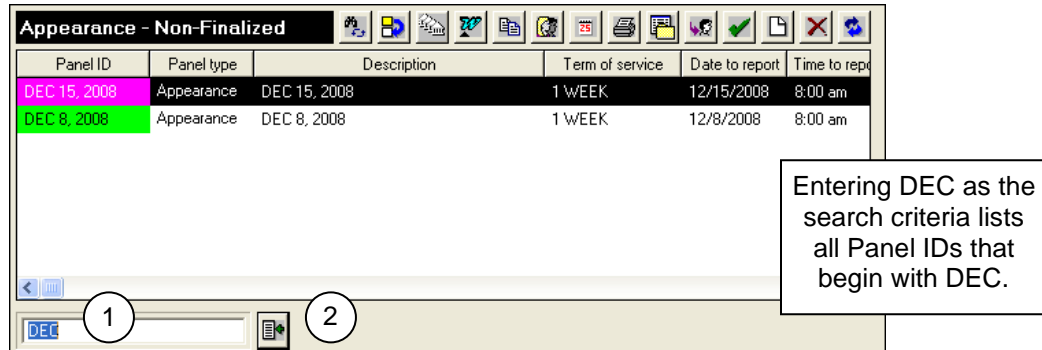


Figure 2.1: Enter Panel ID to Search

1. Enter a complete or partial **Panel ID** in the search field.
2. Click the **Position to** button, and the Panel IDs that meet the search criteria display in the grid.

Step 3. Pull Jurors for a Panel

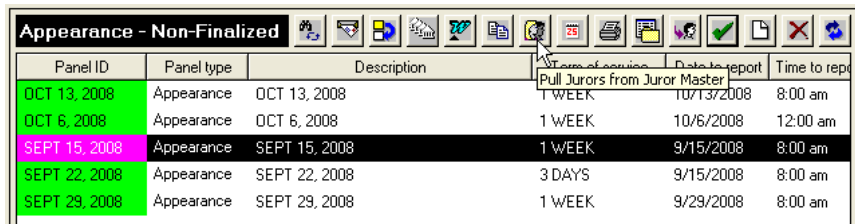


Figure 2.2: Pull Jurors for Highlighted Panel

1. Highlight the panel to select and click the **Pull Jurors** button.

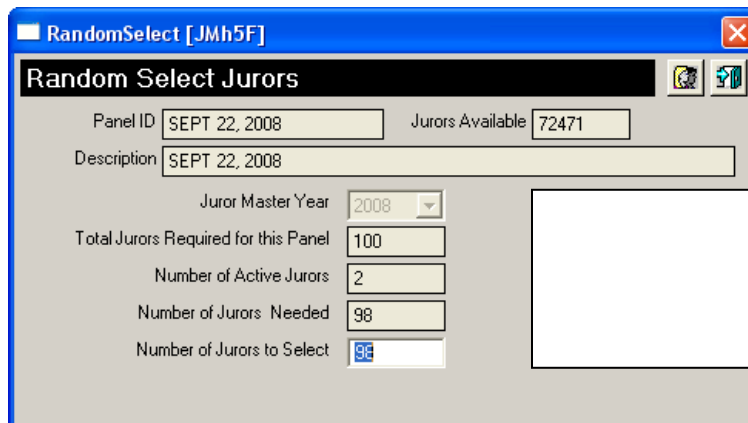


Figure 2.3: Random Select Jurors Window

2. Click the **Pull Jurors** button to continue.



3. Click **OK** when the **Panel** message prompt opens, which shows the number of jurors selected.
4. Follow the instructions in Part IV. Assign Sequence Numbers and Print Summons to complete this process.

Note

In the **Random Select Jurors** window, the **Number of Jurors to Select** defaults to the same number entered in the Appearance Panel screen. You can change this if necessary; however, the new number must be smaller than the number shown in the field.

If jurors have been transferred to this panel before jurors have been randomly selected, the **Number of Jurors Needed** and the **Number of Jurors to Select** is reduced by the number of transferred jurors.

Part II. Pull a Jury with the Juror Commissioner Present


Use these instructions if the Juror Commissioner and Treasurer must be present when you pull potential jurors into an Appearance Panel.

Step 1. Access the Appearance Panel

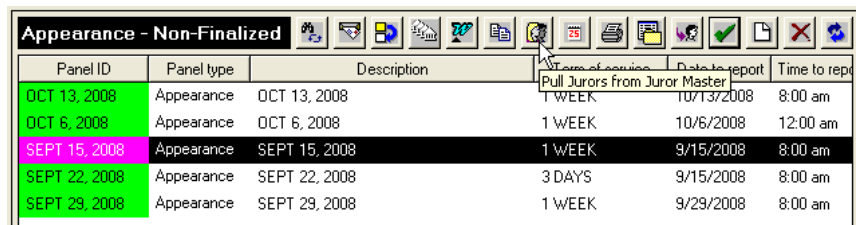
1. Click to open the Appearance Panel Processing folder on the Menu Tree.
2. Select Appearance Panel Wide.

Step 2. Locate the Panel

If you have entered numerous Appearance Panels, the grid is full, and you can't see the Appearance Pane you want to work with, you can search for the Panel ID.


1. Enter a complete or partial **Panel ID** in the search field.
2. Click the **Position to**  button, and the Panel IDs that meet the search criteria display in the grid.

Step 3. Pull Jurors for a Panel



Panel ID	Panel type	Description	Term of service	Date to report	Time to report
OCT 13, 2008	Appearance	OCT 13, 2008	1 WEEK	10/7/2008	8:00 am
OCT 6, 2008	Appearance	OCT 6, 2008	1 WEEK	10/6/2008	12:00 am
SEPT 15, 2008	Appearance	SEPT 15, 2008	1 WEEK	9/15/2008	8:00 am
SEPT 22, 2008	Appearance	SEPT 22, 2008	3 DAYS	9/15/2008	8:00 am
SEPT 29, 2008	Appearance	SEPT 29, 2008	1 WEEK	9/29/2008	8:00 am

Figure 2.4: Pull Jurors for Highlighted Panel

1. Highlight the panel to select and click the **Pull Jurors**  button. The Password screen opens.

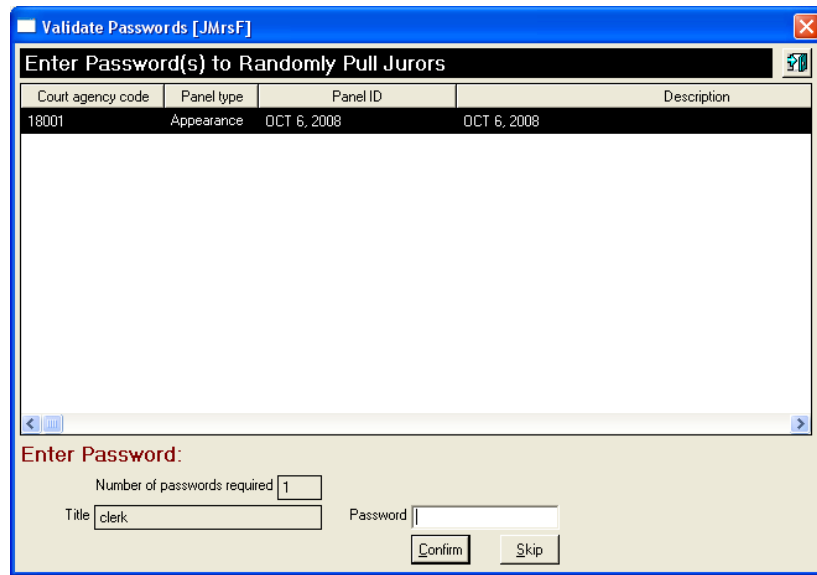


Figure 2.5: Password Screen

2. Enter the clerk's password and click the **Confirm** key.

The **Title** field changes, and the Password field is cleared for the next password. When all the required passwords have been entered, a confirmation message prompt displays.



Figure 2.6: Password Confirmation Message Prompt

3. Click **OK** to continue.



4. Click the **Pull Jurors**  button to continue.
5. Click **OK** when the **Panel** message prompt opens.



- Follow the instructions in Part IV. Assign Sequence Numbers and Print Summons to complete this process.

Note

In the **Random Select Jurors** window, the **Number of Jurors to Select** defaults to the same number entered in the Appearance Panel screen. You can change this if necessary; however, the new number must be smaller than the number shown in the field.

If jurors have been transferred to this panel before jurors have been randomly selected, the **Number of Jurors Needed** and the **Number of Jurors to Select** is reduced by the number of transferred jurors.

Part III. Pull a Jury with Juror Commissioner Remote


Use these instructions if the Juror Commissioner can use an e-mail link to enter a password.

Step 1. Access the Appearance Panel

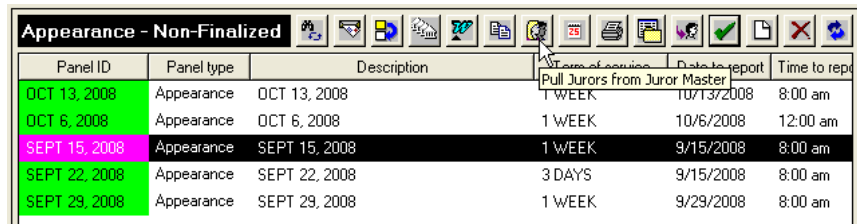
- Click to open the Appearance Panel Processing folder on the Menu Tree.
- Select Appearance Panel Wide.

Step 2. Locate the Panel

If you have entered numerous Appearance Panels, the grid is full, and you can't see the Appearance Pane you want to work with, you can search for the Panel ID.


- Enter a complete or partial **Panel ID** in the search field.
- Click the **Position to**  button, and the Panel IDs that meet the search criteria display in the grid.

Step 3. Pull Jurors for a Panel



Panel ID	Panel type	Description	Term of service	Date to report	Time to report
OCT 13, 2008	Appearance	OCT 13, 2008	1 WEEK	10/7/2008	8:00 am
OCT 6, 2008	Appearance	OCT 6, 2008	1 WEEK	10/6/2008	12:00 am
SEPT 15, 2008	Appearance	SEPT 15, 2008	1 WEEK	9/15/2008	8:00 am
SEPT 22, 2008	Appearance	SEPT 22, 2008	3 DAYS	9/15/2008	8:00 am
SEPT 29, 2008	Appearance	SEPT 29, 2008	1 WEEK	9/29/2008	8:00 am

Figure 2.8– Pull Jurors for Highlighted Panel

- Highlight the panel to select and click the **Pull Jurors**  button. The Commissioner Approval Request screen opens.

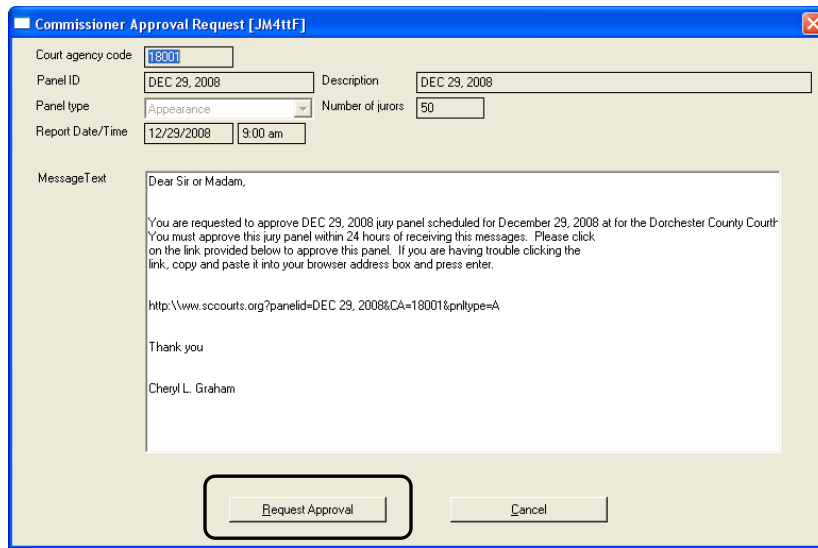


Figure 2.9: Commissioner Approval Request Screen

2. Click the **Request Approval** button, and the email is sent.

Step 4. Commissioner Approval

Commissioners have 24 hrs to approve an appearance panel. Appearance Panels that have not been approved are listed in Appearance Panel Wide with an icon.

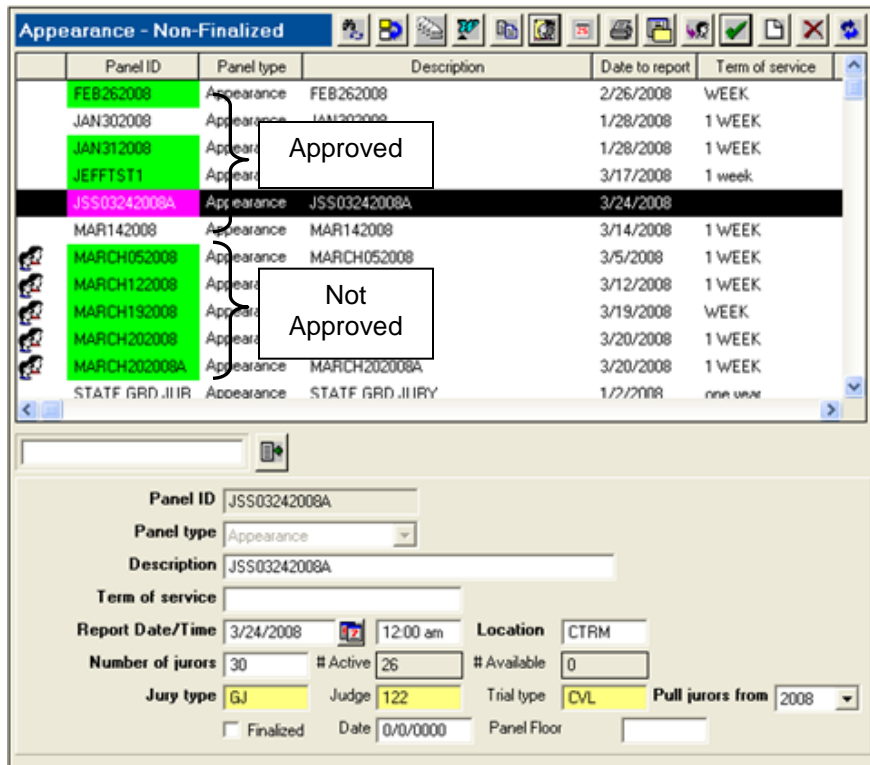


Figure 2.10: Approved and Not Approved Appearance Panels

1. If they have not approved a panel within the time frame given, you can access and highlight the Appearance Panel in Appearance Panel Wide.



- Press the Pull Jurors  button, and the following screen opens:

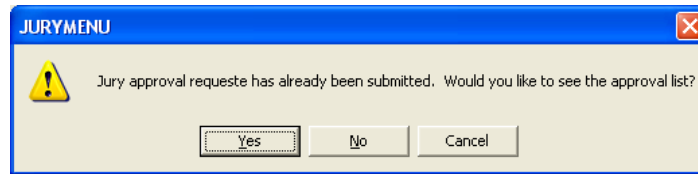


Figure 2.11: Approval Request

- Click **Yes** to display a list of commissioners showing who has approved the panel for pulls.

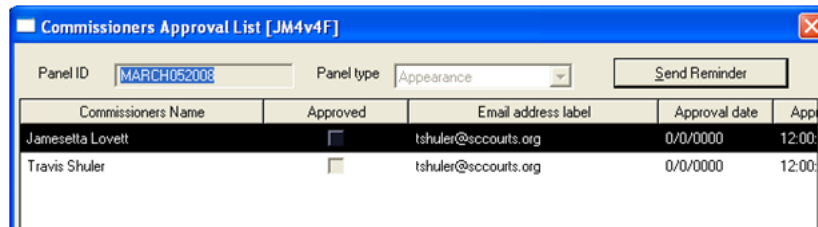


Figure 2.12: Approval List

- Exit ane return to the Appearance Panel.

Step 5. Pull Jury

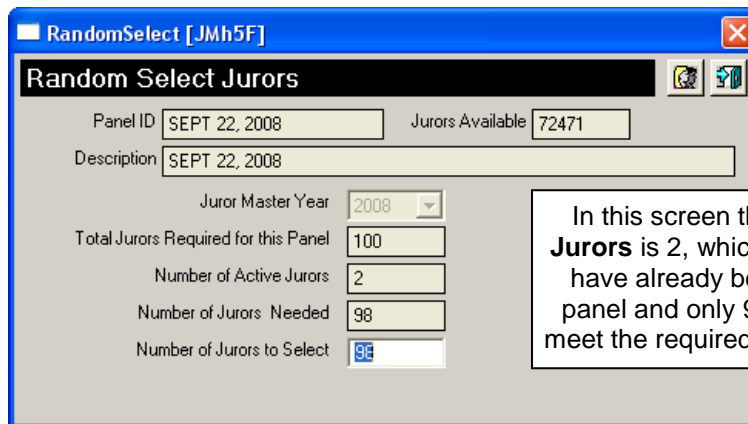



Figure 2.13: Random Select Jurors Window

- Highlight the Appearance Panel to pull jurors for.
- Click the **Pull Jurors**  button to continue.
- Click **OK** when the **Panel** message prompt opens, which shows the number of jurors selected.
- Follow the instructions in *Part IV. Assign Sequence Numbers and Print Summons* to complete this process.

**Note**

In the **Random Select Jurors** window, the **Number of Jurors to Select** defaults to the same number entered in the Appearance Panel screen. You can change this if necessary; however, the new number must be smaller than the number shown in the field.

If jurors have been transferred to this panel before jurors have been randomly selected, the **Number of Jurors Needed** and the **Number of Jurors to Select** is reduced by the number of transferred jurors.

Part IV. Assign Sequence Numbers and Print Summons

Once you have pulled the jurors into the Appearance Panel (using any methods explained in Part I, Part II, or Part III), you assign sequence numbers for identification purposes and then print the jurors' summons.

Step 1. Assign Sequence Numbers

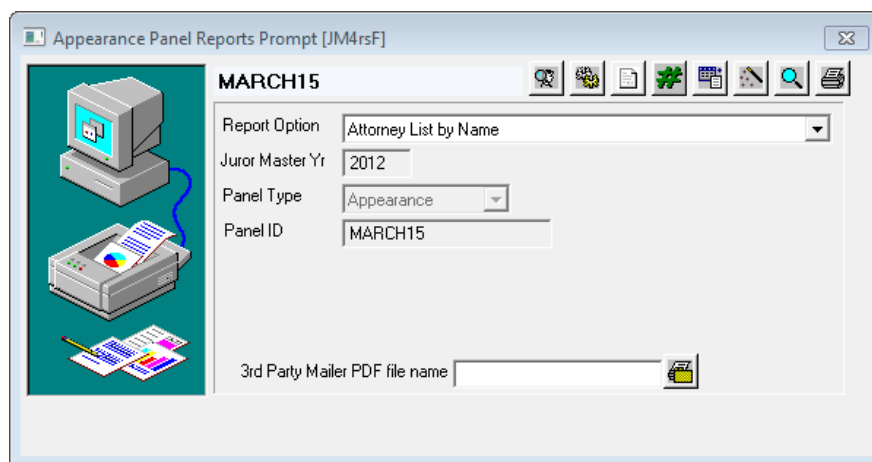




Figure 2.14: Access Print Window to Assign Sequence Numbers

1. Double-click to select the Appearance Panel.
2. Click the **Print**  button to access the **Report Control Appearance** screen.
3. Click the **Assign Sequence Numbers**  button to start the numbering process.

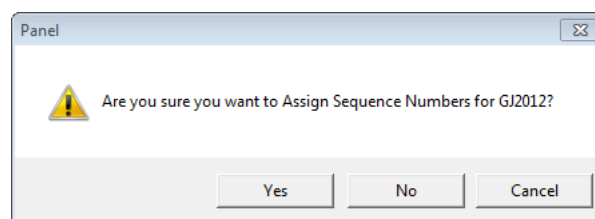


Figure 2.15: Verification Message Prompt

4. Click **Yes** to continue.

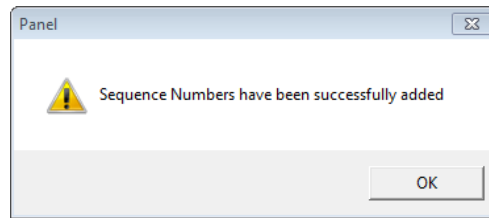


Figure 2.16: Completion Message Prompt

5. Click **OK** to complete the process.

Step 2. Print the Summons¹

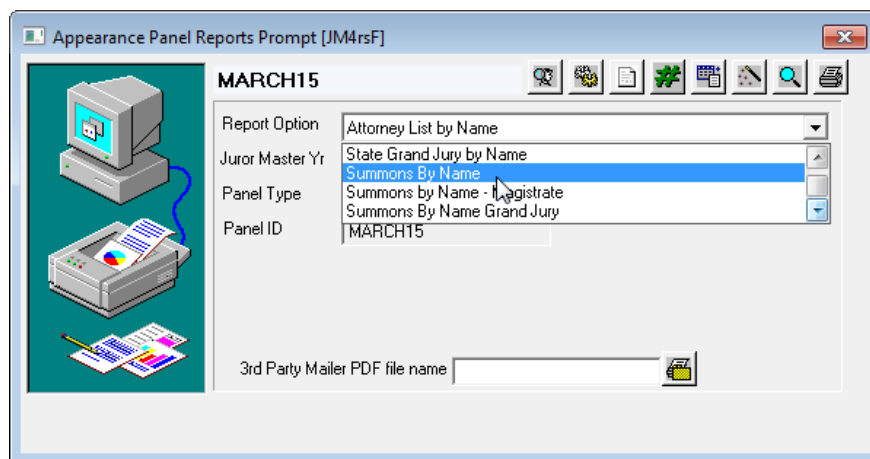




Figure 2.17: Change Report Option Field to SummonsbyName

1. In the Report Control Appearance screen, select **Summons By Name** in the Report Option field.
2. Click the **Print**  button to print a summons for all jurors in the selected Appearance Panel.
3. Click the **Close Window**  button.

¹ If using a third-party vendor to print summons, see the following *Part V: Create a Summons File for Printing by a Third Party*.



STATE OF SOUTH CAROLINA		JUROR SUMMONS FOR CIRCUIT COURT	
COUNTY OF: Cherokee	FOR THIS SUMMONS NUMBER: 03/03/2008	JURY NUMBER: 1	
You are hereby summoned to appear at Cherokee County Courthouse, 125 E. Floyd Baker Blvd., Gaffney, SC, 29340 on March 03, 2008 at 10:00 am to answer this summons to serve as a petit juror for the Court of Common Pleas and General Sessions. Failure to appear at the address above at the specified time may subject you to penalties as prescribed by law.			
Clerk of Court: Brandi McBee		Phone: (844)87-2371	
NAME AND ADDRESS OF JUROR		IMPORTANT INFORMATION AND INSTRUCTIONS	
ALLEN, LARRY S 1715 N MOUNTAIN ST BLACKSBURG, SC 29702		Fill in the requested information in the "Juror Information Section" and the appropriate information below. After reading all the conditions listed in the "Juror Information Section", mark any conditions that apply to you. Sign on the top and bottom portions of this page in the indicated boxes and WITHIN THREE DAYS OF RECEIPT cause the bottom portion of this form using the self-addressed envelope provided.	
X----- Separate the top portion from bottom portion of the dotted line. I claim this top portion for my name. I claim this bottom portion for my name. Use the self-addressed envelope provided.			
JUROR INFORMATION SECTION		JURY NUMBER: 1	
CITY, COUNTY, STATE OF BIRTH	AGE: 03/03/2008	NUMBER OF CHILDREN	MARRIED SINGLE WIDOWED DIVORCED
	DATE OF BIRTH: 02/19/63		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
YOUR OCCUPATION		SPOUSE'S PRESENT OR FORMER EMPLOYER	
LEVEL OF FORMAL EDUCATION COMPLETED		NAME OF SPOUSE	
SPOUSE'S OCCUPATION		SPOUSE'S PRESENT OR FORMER EMPLOYER	
HAVE YOU EVER SERVED ON A CIVIL, JURY, OR CRIMINAL JURY?		HAVE YOU EVER BEEN A PARTY TO A CIVIL LITIGATION?	
<input type="checkbox"/> YES <input type="checkbox"/> NO		<input type="checkbox"/> YES <input type="checkbox"/> NO	
I SO WEIGH?		HAVE YOU EVER BEEN CONVICTED OF A CRIME OTHER THAN A MINOR TRAFFIC OFFENSE?	
<input type="checkbox"/> YES <input type="checkbox"/> NO		<input type="checkbox"/> YES <input type="checkbox"/> NO	
NAME AND/OR ADDRESS OF CORRECTION: If the information below is incorrect, please write in the correct information in the space provided to the left.			
		ALLEN, LARRY S 1715 N MOUNTAIN ST BLACKSBURG, SC 29702	
INFORMATION BELOW WILL BE MADE AVAILABLE ONLY TO OFFICERS OF THE COURT			
HOME TELEPHONE	BUSINESS TELEPHONE	SPOUSE'S BUSINESS TELEPHONE	EMERGENCY TELEPHONE
JUROR REFERENCE SECTION	Retain the top portion of this for your reference and return the bottom portion of the form along with any required affidavits or written statements in the self-addressed envelope provided.		
INSTRUCTIONS	NOTE: Unlike the clerk of court's service notice to you, you must report for jury duty a creque dated.		
EXEMPTIONS		EXEMPTIONS	
<input type="checkbox"/> I am not a U.S. citizen. <input type="checkbox"/> I am not a resident of this county. (Use correct address above) <input type="checkbox"/> I cannot read, write, speak, or understand the English language. (Translator's name and telephone #) <input type="checkbox"/> I have less than a sixth grade education or its equivalent. <input type="checkbox"/> I have a mental or physical condition that prevents me from serving as a juror. (Doctor's excuse required) <input type="checkbox"/> I have been convicted in a state or federal court of a crime that carries a sentence of more than one year of imprisonment and I have not been pardoned or given amnesty for that conviction. List offenses, when and where convicted: <input type="checkbox"/> I am a clerk of court, deputy clerk of court, constable, sheriff, commissioned law enforcement officer, probate judge, county commissioner, magistrate, or county officer, or I am employed within the walls of a courthouse. Occupation: <input type="checkbox"/> I have served on a circuit court jury within this calendar year. Date of Service: _____ County: _____		<input type="checkbox"/> I am 65 years of age or older and wish to be excused. (If you do not wish to serve on a jury, you may telephone the clerk of court to be excused. Unless you are excused by the clerk of court prior to the term for which you are summoned, you must report for jury duty.) <input type="checkbox"/> I am the primary care taker of a disabled person or a person age 65 or older who cannot care for himself. <input type="checkbox"/> I have legal custody and duty of care of a child under the age of seven and cannot provide adequate childcare while serving as a juror. <input type="checkbox"/> I am a guard, keeper, employee, or other officer at a state penitentiary. <input type="checkbox"/> I have served on a circuit court jury during the previous two calendar years, or I have served on a grand jury during the previous four calendar years. Date of Service: _____ County: _____ Jury Type: <input type="checkbox"/> Circuit Court <input type="checkbox"/> Grand Jury <input type="checkbox"/> I am a student or a school employee and wish to be transferred to a later date that will not conflict with my school term. Date Available for Service: (When you return this form, you must include and indicate an actual enrollment or unemployment.) **An affidavit in the enclosed statement must be returned with this form attesting to the above statements.	
<input type="checkbox"/> I HAVE READ THE CONDITIONS FOR QUALIFICATION AND EXEMPTIONS ABOVE AND NONE OF THE CONDITIONS LISTED APPLY TO ME. NOTE: THE FURNISHING OF FALSE OR MISLEADING INFORMATION ON THIS SUMMONS TO PARTICIPATE IN THE COURT MAY SUBJECT YOU TO PENALTIES AS PRESCRIBED BY LAW.			
YOUR SIGNATURE _____			
SCCA 2952 (2004) NOTE: The top portion of all eligible citizens' names will be made available to the court. If you need specific court information, call the court at 844-87-2371.			

Figure 2.18: Example Summons



Part V. Create a Summons File for Printing by a Third Party

If your county uses a third-party vendor to print summons, use these instructions to create a print file for the third-party printer.

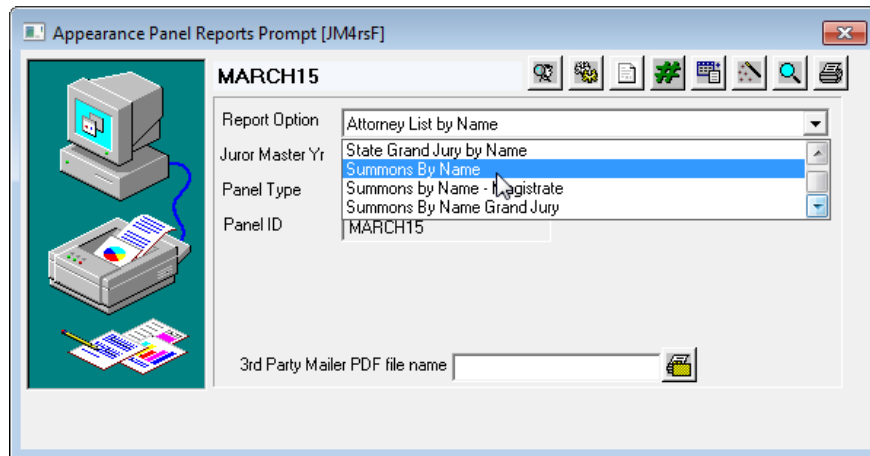




Figure 2.19: Change Report Option Field to SummonsbyName

1. In the Report Control Appearance screen, select **Summons By Name** in the Report Option field.
2. Click the  **Create Summons File** button. This process creates an Excel® file in the folder that has been set up for this file. You then send this file to the printer.
3. Exit  the Report window.



Notes



Lesson 3: Re-print a Summons for a Juror

At times you may need to re-print a summons for an individual juror; for example, if the printer jams or a juror lost their summons.

Lesson Objectives

- ❖ Find a juror’s Appearance Panel.
- ❖ Re-print a summons for a juror.

Step 1. Find a Juror’s Appearance Panel

If you need to re-print a juror’s summons, the first step is to find out which Appearance Panel the juror is assigned to. You can find this information from the Jury Wheel in Jury Master Wide.

Jury Master Wide contains potential jurors pulled from voter registration and/or driver’s license records.

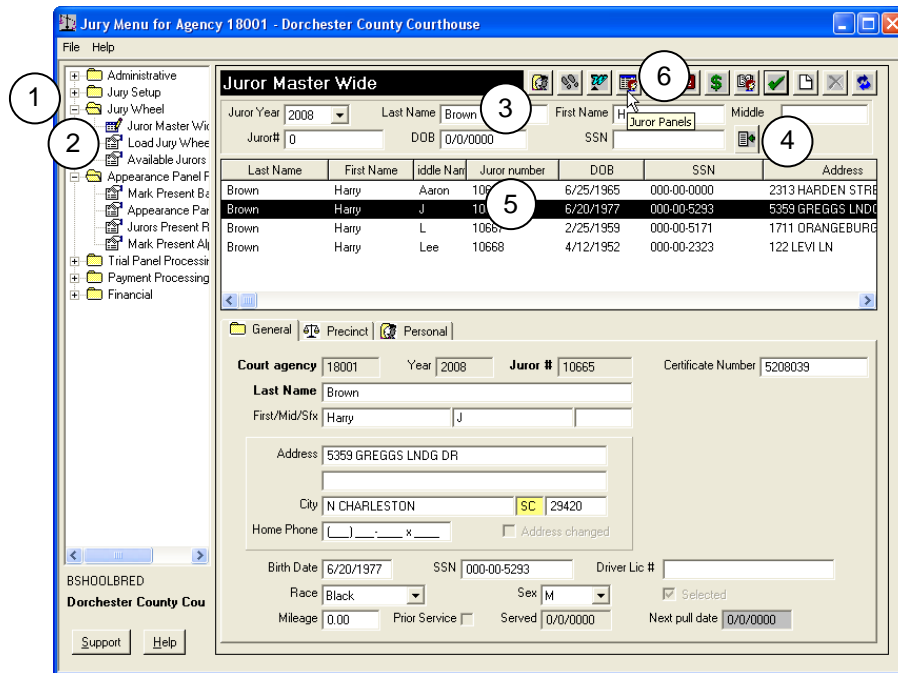




Figure 3.1: Juror Master Wide

1. Click to open the **Jury Wheel** folder on the **Menu Tree**.
2. Select Jury Master Wide.
3. Enter Search criteria for locating the juror: last name, first name, middle name or initial, birth date or social security number.
4. Click the **Position to**  button to list in the grid all names that meet the search criteria.



5. Highlight your juror in the grid.
6. Click the **Jury Panels**  button. The Juror Panel window opens.

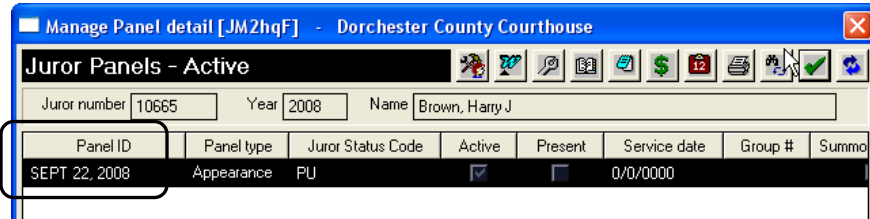


Figure 3.2: Juror's Panel

Step 2. Access the Appearance Panel

1. Click to open the Appearance Panel Processing folder on the Menu Tree.
2. Select Appearance Panel Wide.
3. Locate the panel that contains the juror.

Step 3. Locate the Juror in the Appearance Panel

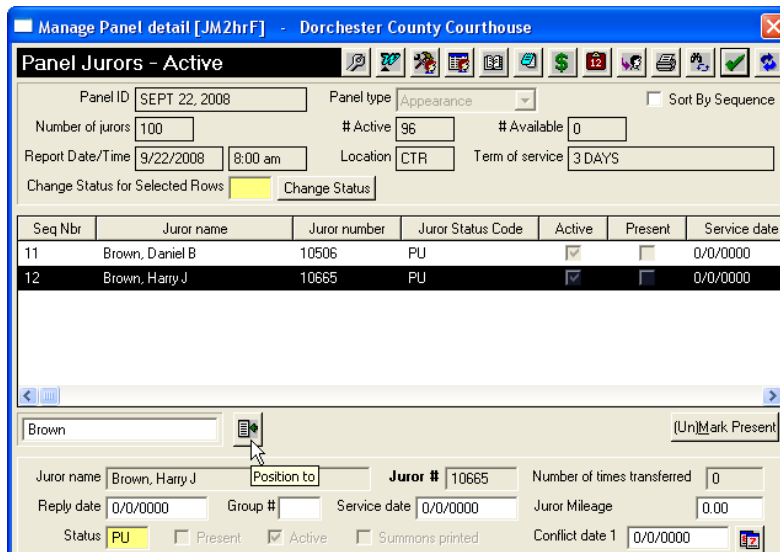





Figure 3.3: Panel Juror's Screen

1. Double-click on the **Appearance Panel**, and the **Panel Details** window opens.
2. Enter the juror's last name in the **Search** field and click the **Position to**  button. The juror or jurors who match the search criteria display in the grid.
3. Highlight to select a juror and click the **Print**  button.
4. In the Report Control Appearance screen, select **Summons by Name** in the **Report Option** field.
5. Click the **Print**  button to print a summons for the selected juror.



Lesson 4: Print Reports

After printing summons, you can print reports that assist in the jury and trial process.




Lesson Objectives

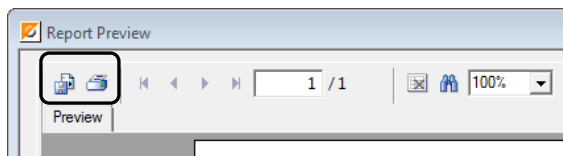
- ❖ Print a Jury Venire/Worksheet.
- ❖ Print an Attorney List report.

Step 1. Access the Appearance Panel

1. Click to open the Appearance Panel Processing folder on the Menu Tree.
2. Select Appearance Panel Wide.

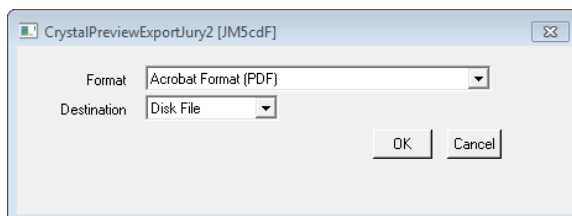
Step 2. Access the Report Window


1. Click the **Print**  button, and the **Report Control Appearance** window opens. Notice that **Attorney List by Name** is the first report listed.
2. Click the **Preview**  button to display the **Attorney List by Name** report on your computer screen before printing, or click the **Print**  button.



When previewing a report on your computer screen, you can print or export the report. Files can then be exported in these formats: PDF, XLS, DOC, TXT, CSV, and RTF.


Note





Click the Export  button, and the Export window opens. Select the Format, then select the Destination of Disk File or Email. Click OK to proceed.

See the following section for more information.

Step 3. Print the Attorney List Report

1. Return to the **Appearance Panel** screen.
2. Highlight the panel to print the report for.
3. Click the **Print**  button, and the **Report Control Appearance** window opens.



4. Click the down arrow to open the **Report Option** field and scroll to select **Juror Venire/Worksheet**. You can print a report that lists jurors by name or sequence number.
5. Click the **Preview**  button to display the report on your computer screen before printing, or click the **Print**  button.

Formats and Destinations for Exporting Documents

When previewing a report on your computer screen, and the Export/Print icons display, you can print or export the report. You can send the report to a computer file or attach it to an email. Files can be exported in these formats: PDF, XLS, DOC, TXT, CSV, and RTF.

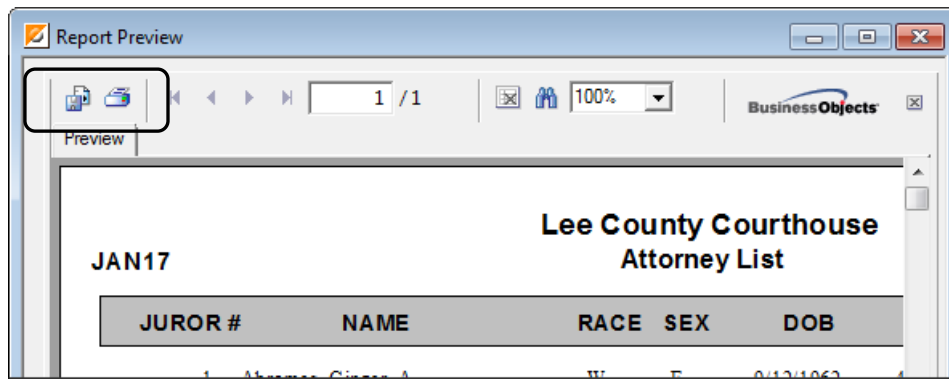



Figure 41: Preview Report Screen

1. Click the **Export**  button, and the Export/Destination window opens.

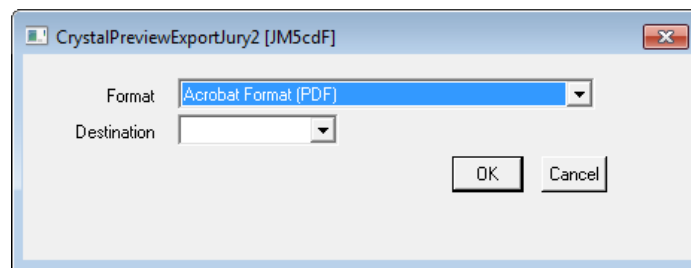


Figure 4.2: Export Screen

2. Select the **Format**.

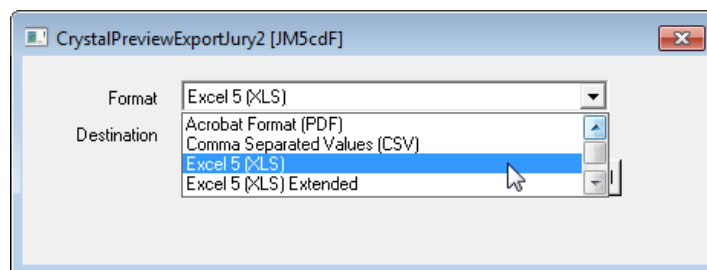


Figure 4.3: Export Window (Format)

3. Select the **Destination** of Disk File or Email. Click **OK** to proceed

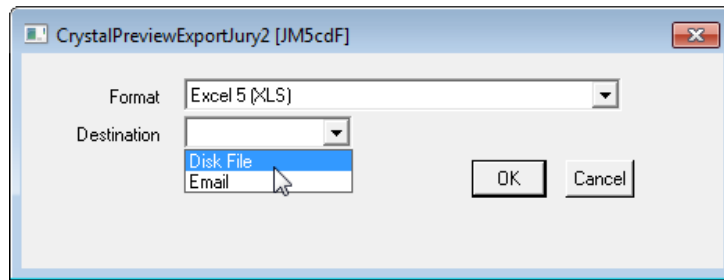


Figure 4.4: Export Window (Destination)

4. Click the **OK** button

Destination: Disk File

Select Disk File to open a Windows **Save As** screen. From this window you can locate the folder where you want to save this file.

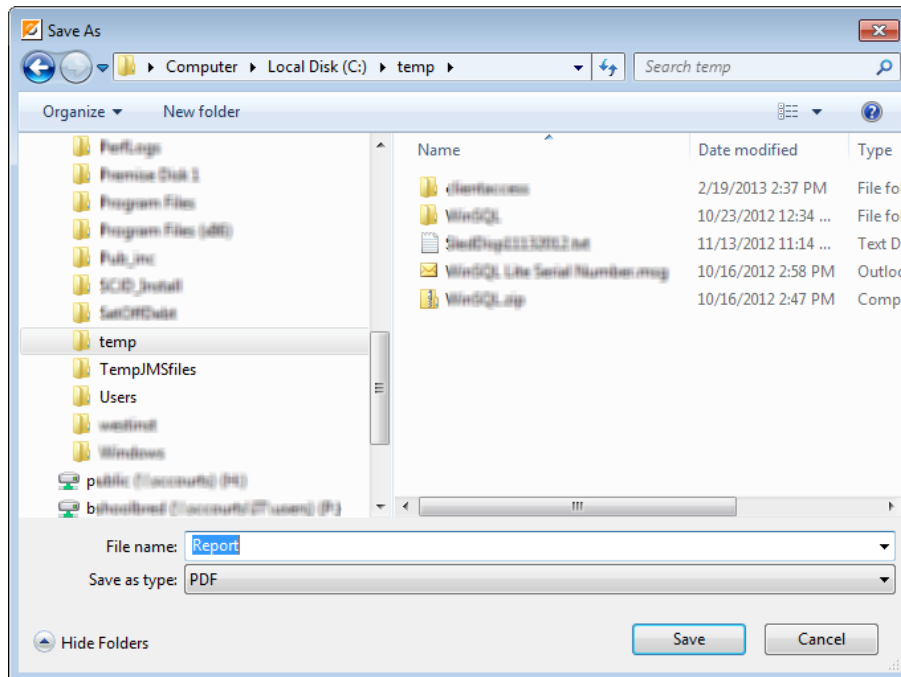


Figure 4.5: Disk File Destination



Destination: Email

1. Select **Email**, and the Email Attached File (JMSceF) opens.

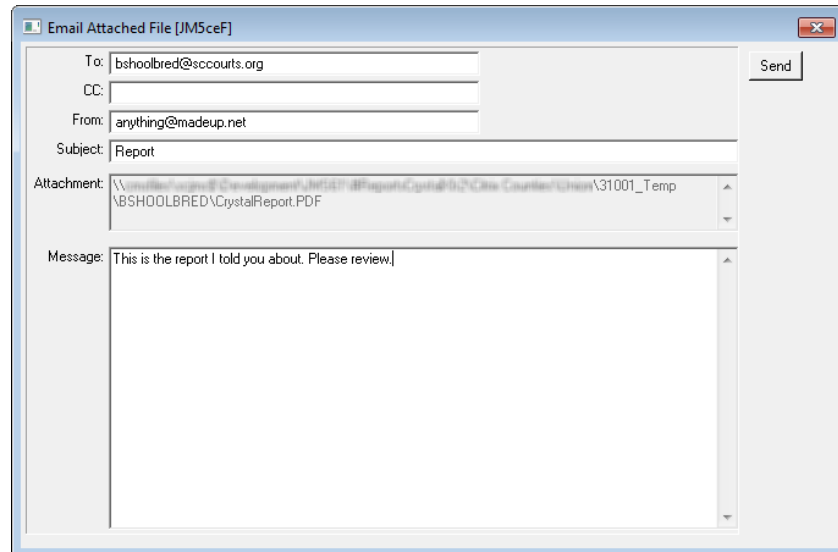


Figure 4.5: Email Destination

2. Enter the Recipient's Name in the **To:** field, the subject heading, and a message. The Attachment field shows the full path and name of the file being emailed.



Lesson 5: Enter Juror’s Biographical Information

After Summons forms are returned, you enter biographical information. This information is used on reports you print for the judge (and clerk in some courts). You may also need to change the status for some people. For example, if they moved to another county or they’re over 65 and request to be excused.

This lesson explains how to enter biographical information in Appearance Panel Detail.


Lesson Objectives

- ❖ Enter or update biographical information on a potential juror.
- ❖ Change a juror’s status.

Step 1. Access the Appearance Panel Detail Screen

1. Click to open the Appearance Panel Processing folder on the Menu Tree.
2. Select Appearance Panel Wide.
3. Double-click on the panel that contains the juror(s).

Step 2. Locate Juror

Use the search feature by entering the juror name and clicking the **Position to**  button. The juror or jurors who match the search criteria display in the grid.

Step 3. Change Juror Status

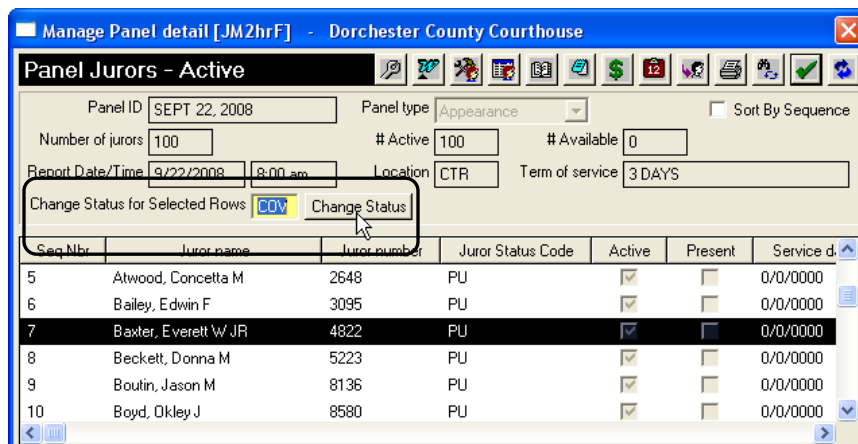


Figure 5.1: Locate Juror

Note You can also change the status for multiple jurors. For example, if 3 jurors are over the age of 65 and request to be excused. Highlight each juror by holding down the CTRL key and clicking on the juror record.



1. Enter the new status code in the field: **Change Status for Selected Rows**. You can double-click in this field to open a Select window that lists status codes for your county.
2. Click the **Change Status** button.

Documentation prints for some status changes, such as Court Official/Employee or Convicted Felon.

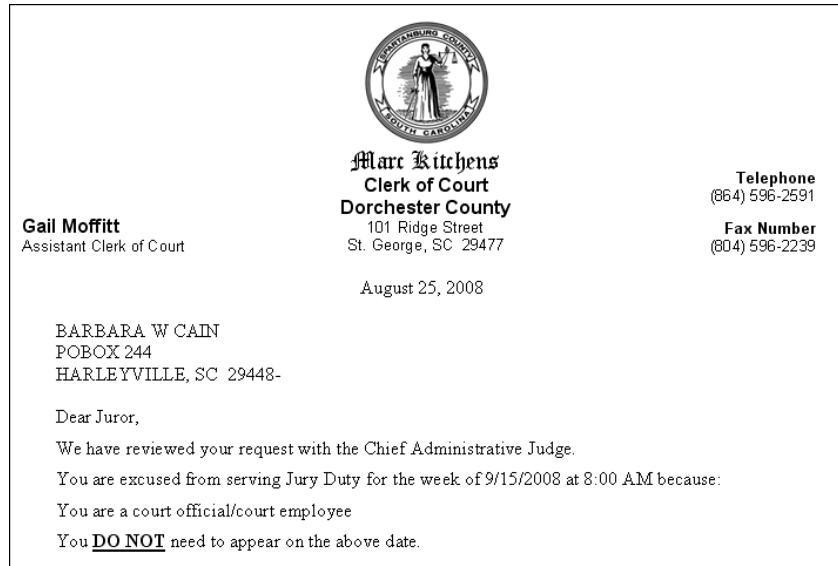


Figure 5.2: Example Excuse Letter

Step 4. Add or Edit Biographical Data

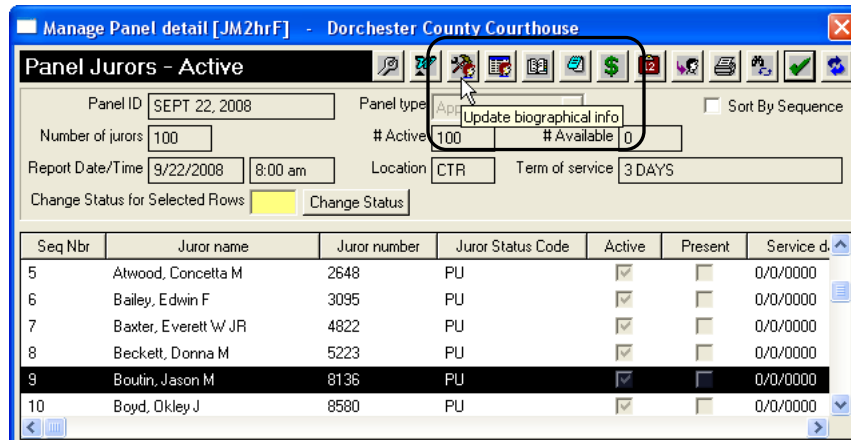


Figure 5.3: Appearance Panel

1. Highlight the juror and click the **Update Biographical Info** button to open the Juror Information screen.




Figure 5.4: Juror Information Window-General

2. Enter or update information in the **General** tab screen.

Note

The fields in the Precinct tab define the juror’s location codes, which determine which court they would serve, such as township for municipal court. This information cannot be changed.

Figure 5.5: Juror Information Window-Personal

3. Click the **Personal** tab and enter information about their occupation, education, and marital status.
4. When finished, click  to save and close the window.



Notes



Lesson 6: Transfer Jurors to Another Appearance Panel

When a juror is unable to serve with their designated panel, you can transfer the juror to another panel to serve at another time.

You can also excuse jurors from service. Do this before the court date or in court; for example, if a judge excuses a juror from serving.

Lesson Objectives

- ❖ Transfer a juror to another Appearance Panel.
- ❖ Undo a juror transfer.

Step 1. Access Appearance Panel

1. Click to open the Appearance Panel Processing folder on the Menu Tree.
2. Select Appearance Panel Wide.
3. Locate the panel that contains the juror to transfer.

Step 2. Locate the Juror to Transfer

1. Double-click on a panel to open the **Panel Detail** screen.
2. Locate and highlight the juror or jurors to transfer. To select multiple jurors, hold down the CTRL key and click jurors individually or hold down the left mouse button and slide up or down to select a consecutive grouping of jurors.

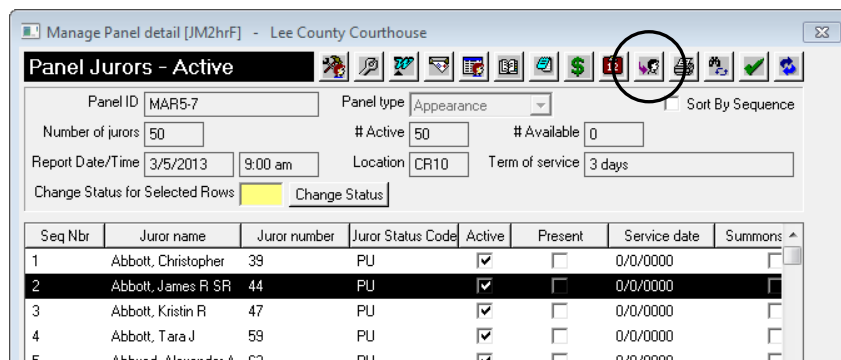


Figure 6.1: Panel Detail

3. Click , and the **Transfer Jurors** window opens.

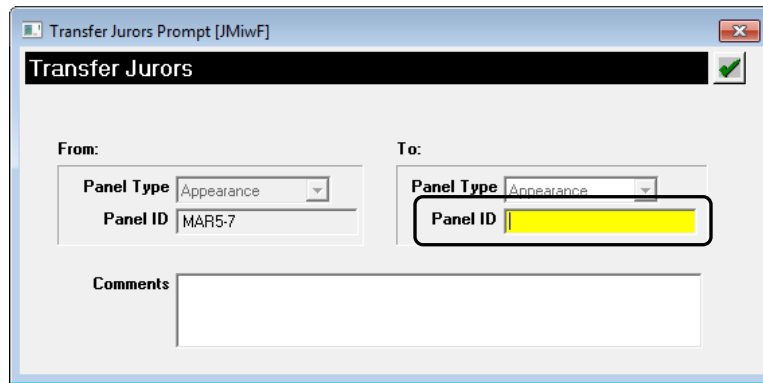



Figure 6.2: Transfer Jurors Window

4. Double-click the **Panel ID** field and select the panel to which the juror will be transferred. Note that the juror will be transferred with their Juror Status Code set to **TI**.
5. Save .

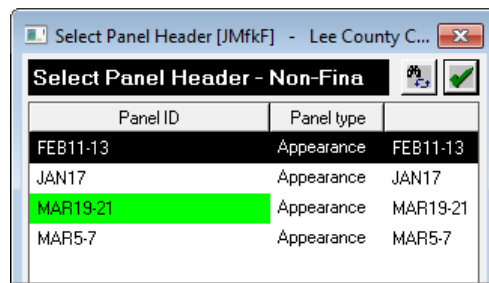


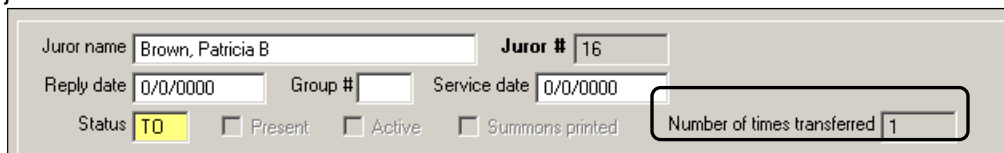


Figure 6.3: Select Panel Window

6. Type any notes in the **Comments** textbox. Notes are optional but are recommended.
7. Click  to save, and if a document is associated with the new status, the document prints at this time.

The number of times a juror has been transferred appears near the bottom of the Panel Details screen. If transferred jurors do not display, click  to toggle between active, inactive, and all jurors.

Note





Step 3. Return a Juror after a Transfer

Before you can return a juror to their previous panel, you need to find the juror’s original sequence number. To locate this number:

1. Access the original panel in **Appearance Panel Wide**.
2. Double-click on the panel to open the **Panel Details** window.

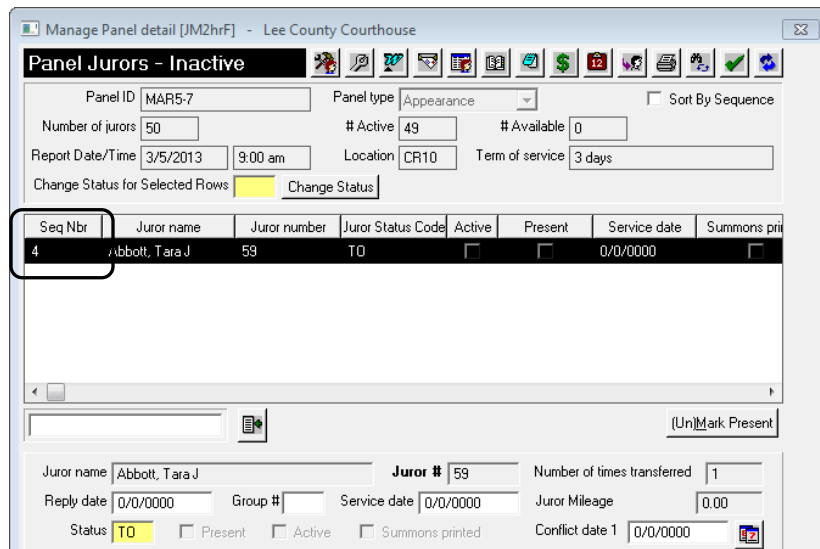





Figure 6.4: Inactive Jurors

3. Click the **Toggle**  button until **Inactive** Jurors display in the grid.
4. Note the juror’s **Seq Nbr** (sequence number) and exit  the screen.
5. On the **Appearance Panel Wide** screen, double-click the **Appearance Panel** the juror was transferred to.
6. Select the juror that was transferred.
7. On the toolbar click the **Undo Transfer**  button.

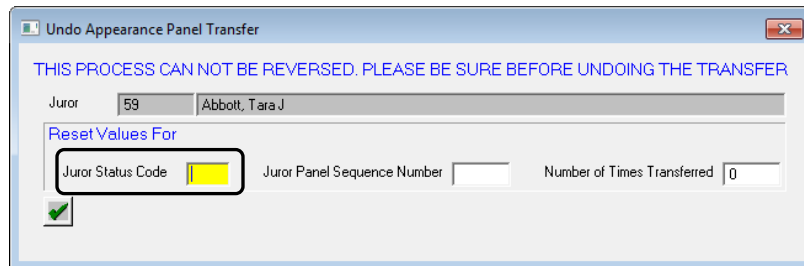


Figure 6.5.: Undo Appearance Panel Transfer

Note When a juror is transferred, their status is set to TI in the new panel. When you reverse the transfer, you must change the status.



8. Double click in the **Juror Status Code** field and select either SU=Summoned or PU=Pulled.
9. Change the **Juror Panel Sequence Number** to the sequence number assigned to the juror in the panel you originally transferred them from.
10. Save the information, and the validation message prompt opens.

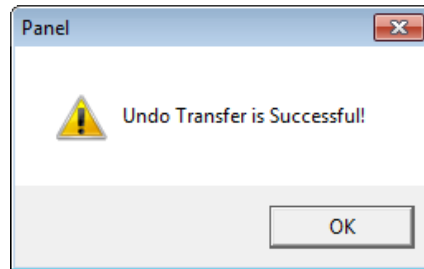


Figure 6.6: Validation Message Prompt



Lesson 7: Excuse a Juror

Jurors may be excused from appearing for a number of reasons. This lesson explains how to excuse a juror.

Note This same process is used the day of court if the judge excuses a juror. Use the Excused by Judge (EXJ) code, and a letter prints that shows the juror has been excused, and mileage is calculated for paying the juror as they did appear in court.

Step 1. Access Appearance Panel

1. Click to open the Appearance Panel Processing folder on the Menu Tree.
2. Select Appearance Panel Wide.
3. Locate and open the panel (highlight and double-click) that contains the juror to excuse.

Step 2. Locate the Juror and Change Status

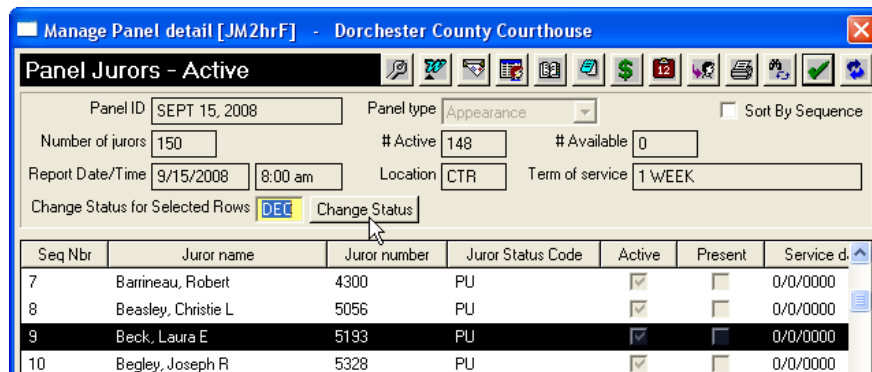



Figure 7.1: Change Status for Excused Juror

1. Use search features to locate the juror and highlight the row.
2. Double-click in the **Change Status for Selected Rows** field, and a Select window opens.
3. Select the reason for excusing the juror.
4. Click the **Change Status** button next to the field. The juror disappears from the Active Juror list and can now be viewed in the Inactive Juror list using the **Toggle**  button.



The screenshot shows a web application window titled "Manage Panel detail [JM2hrF] - Dorchester County Courthouse". The window displays the "Panel Jurors - Inactive" section. At the top, there are several icons for navigation and actions. Below the icons, the following information is displayed:

- Panel ID: SEPT 15, 2008
- Panel type: Appearance
- Sort: Toggle Active/Inactive/All Jurors
- Number of jurors: 150
- # Active: 145
- # Available: 145
- Report Date/Time: 9/15/2008 8:00 am
- Location: CTR
- Term of service: 1 WEEK
- Change Status for Selected Rows: Change Status

Below this information is a table with the following columns: Seq Nbr, Juror name, Juror number, Juror Status Code, Active, Present, and Service d. The table contains four rows of juror data:

Seq Nbr	Juror name	Juror number	Juror Status Code	Active	Present	Service d.
1	Adams, Victor R	404	TO	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0/0/0000
6	Barlett, Lea A	3995	TO	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0/0/0000
9	Beck, Laura E	5193	DEC	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0/0/0000
23	Cain, Barbara W	13306	CTO	<input type="checkbox"/>	<input checked="" type="checkbox"/>	3/12/2008

Figure 7.2: Toggle to Inactive Jurors



Lesson 8: Manually Add Jurors and Assign to Appearance Panel

There may be times when you need to add or make changes to a juror’s record or add a panel. For example, if you started using JMS in the middle of the year or a month, and you want to add all panels starting with the beginning of that year or month.

To add a juror, you must have password access. To add a juror to an Appearance Panel, the Appearance Panel must exist in the JMS system. See Lesson 1 for instructions on adding an Appearance Panel.

Lesson Objectives

- ❖ Add a juror to an Appearance Panel manually.

Step 1. Access Jury Master Wide

Open the **Jury Wheel** folder and select **Juror Master Wide**.

Step 2. Locate the Juror

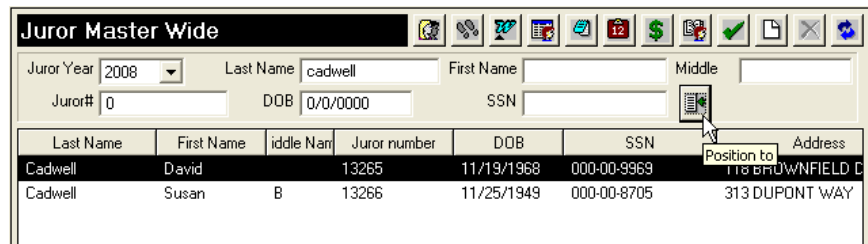




Figure 8.1: Locate the Juror

Enter search criteria in the search fields (Last Name, First Name, Middle, DOB, SSN) and click the Position To button to list the jurors that meet the search criteria.

Step 3. Assign Juror to Appearance Panel

1. Click the **Add Juror to Panel**  button, and the password window opens.
2. Enter the password and click  to continue.

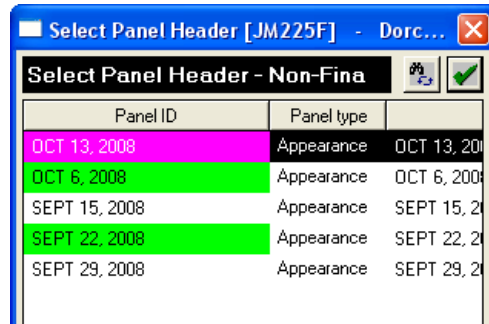


Figure 8.2: Select Panel to Assign Juror

3. Select the **Panel ID** to assign the juror to.
4. Click **OK** when the verification window opens.




Lesson 9: Print Reports for Marking Jurors Present

On court day or the day before, you can print badges or juror reports to assist you in marking jurors as present. Depending on the report printed, you can manually mark a juror as present or scan a barcode. Badges are presented to each juror and are scanned to mark them present.

Lesson Objectives

- ❖ Print badges to use for scanning jurors as present.
- ❖ Print a juror report that includes barcodes to scan jurors as present.

Step 1. Access Appearance Panel and Report Control Screen

1. Click to open the Appearance Panel Processing folder on the Menu Tree.
2. Select Appearance Panel Wide.
3. Locate and highlight the **Appearance Panel** to print the badges or report for.
4. Click the **Print**  button, and the **Report Control Appearance** window opens.

Step 2. Print the Report

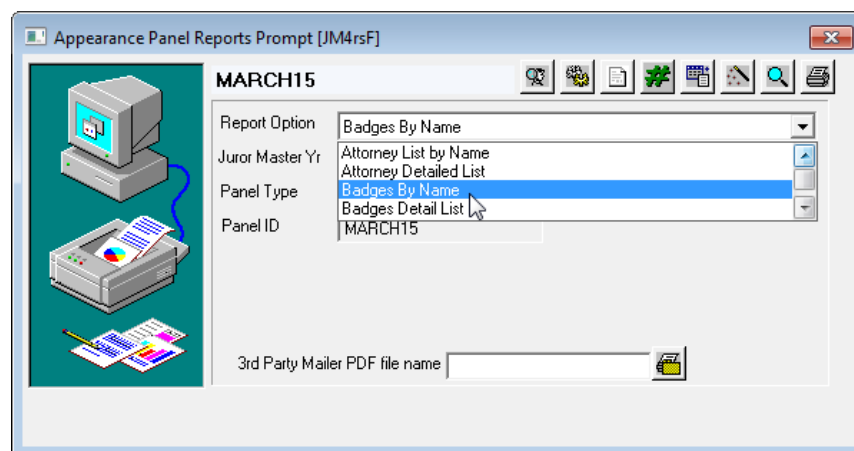



Figure 9.1: Badges by Name Report

1. Select **Badges by Name**. A barcoded report also lists jurors and includes barcodes to scan.
2. Click the **Print**  button.



Notes



Lesson 10: Process a Magistrate Paper Strike

This lesson provides basic instructions for magistrate courts that use paper strikes before printing a summons for potential jurors.

Lesson Objectives

- ❖ Print the **RandomStrike Sheet (Paper Strike)**.
- ❖ Print the Summons and a list of jurors.
- ❖ Print a **Badges Detail List** for marking jurors present.

Step 1. Create an Appearance Panel

See Lesson 1 for instructions.



Magistrates using paper strikes will create an **Appearance Panel** for each trial, so you will use the *case number* as the '**Panel ID**' and the *case caption* as the **Description** for your Appearance Panels.

Step 2. Pull a Jury

See Lesson 2, Parts I and IV, for instructions on how to pull a jury and assign sequence numbers. **DO NOT PRINT THE SUMMONS.**

Step 3. Schedule your Jury Strike

Step 4. Print a Paper Strike




1. Before the strike, locate the **Appearance Panel** with the correct panel highlighted.
2. Click the **Print**  button.
3. Select the **Random Strike Sheet (Paper Strike)** from the Report Option dropdown list
4. Click the **Print**  button.

Step 5. Printing the Summons and Your List of Jurors and Alternates

After the strike and the case parties have made their decisions on the potential jurors to include, you will change the status of those jurors who WILL NOT receive a summons to **Not Selected**. This will only leave the potential jurors and alternatives as active.

1. Locate the **Appearance Panel** and double click to open the **Panel Jurors – Active** window.
2. Select each name on the list that **WILL NOT** receive a summons by holding down the CTRL key and clicking each line with the mouse.



3. When you have highlight all your selections, double click in the **Change Status for Selected Rows** field and choose the status of **Not Selected** and then click the **Change Status** button. After processing you should only have your jurors and alternative left in the **Panel Jurors – Active** window.
4. Close the **Panel Jurors – Active** window to return to the Appearance Panel window.
5. With your Panel highlighted click the **Print**  button.
6. Select the **Jury Venire Worksheet by Sequence #** from the **Report Option** dropdown list
7. Click the **Print**  button for a list of jurors who will receive summons.
8. While still in the print option, select the **SummonsbyName_Mag** report and click print .

Step 6. Before Trial Day

Print a **Badges Detail List** report to use on trial day.

Step 7. On Trial Day

Mark jurors present (Lesson 11) and excuse jurors (Lesson 12) if needed.


Step 8. Enter Juror Mileage


See Lesson 19 for instructions on entering juror mileage.

After mileage is entered, the checks are ready to be processed.



Lesson 11: Generate a Rap Sheet for the Solicitor's Office

Some Solicitor's offices require a report on potential jurors to check for any law-related problems. The Generate Rap Sheet  button is only available if set up on your system. Generate this report from the Appearance Panel Reports Prompt screen:

1. Highlight the Appearance Panel to generate.
2. Click the **Print Reports**  button, and the Appearance Panel Reports Prompt screen opens.

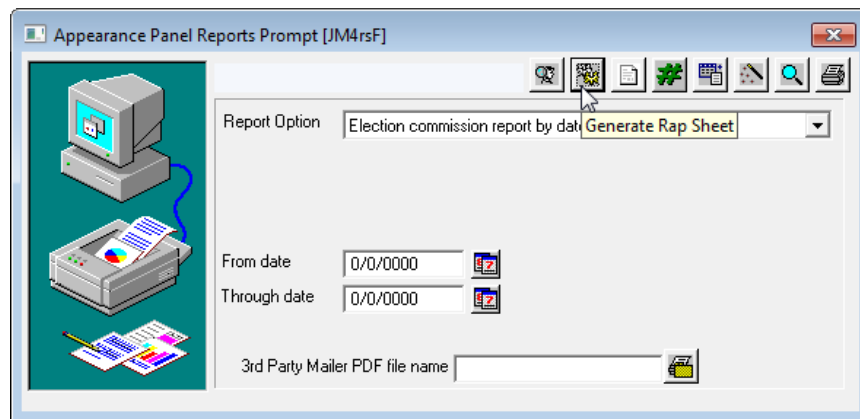


Figure 11.1: Appearance Panel Reports Prompt Screen

3. Click the **Generate Rap Sheet**  button, and the verification message prompt opens that shows the path to the file created.

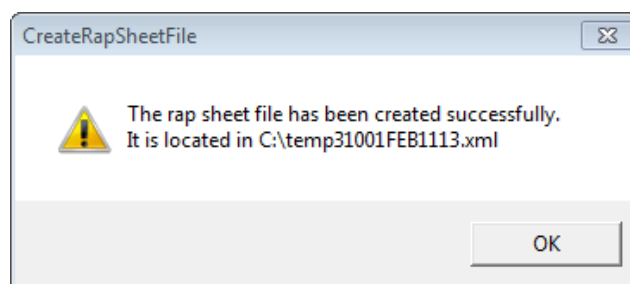


Figure 11.2: Rap Sheet File Verification Prompt

4. Click **OK**, and send the electronic file to the Solicitor's office.



Notes



Section 2:

Court Day Procedures

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Notes



Lesson 12: Marking Jurors Present in JMS

When jurors come to the designated location for juror service, use these instructions to mark the jurors present in the Jury Management System. You can use either a scanner to scan the juror badges or manually check each juror as present.

Before a juror can be placed on a trial panel, they must be marked present and a pay record must be created. With scanning, the juror is marked present and a pay record is automatically created. When enter jurors manually, you must remember to create the pay record by clicking the **Create Pay Record**  button.

When marking jurors present manually, you can access the Mark Juror's Present window from Appearance Panel Wide (see Part IV) or from the Mark Present Alpha/numerical Screen on the Menu Tree (see Parts II and III).

Note Lesson 9 explains how to print reports to mark or scan jurors as present and how to print badges to scan and mark jurors present in JMS.

Lesson Objectives

- ❖ Scan individual juror's badges to mark them as present.
- ❖ Manually flag an entire panel as present or mark individual jurors as present.
- ❖ Create a pay record when manually marking jurors present.

Part I. Mark Jurors Present by Scanning a Barcode

The barcode scanning process marks the juror as present and creates a pay record.

Access the Mark Present Screen

1. Click to open the **Appearance Panel Processing** folder on the **Menu Tree**.
2. Select **Mark Present by Barcode**.
3. Ask jurors to pass their juror badge through scanner, as explained on the screen below. The Jury Manager automatically marks jurors present.
You can also use a report to scan each juror as they report to you in court.

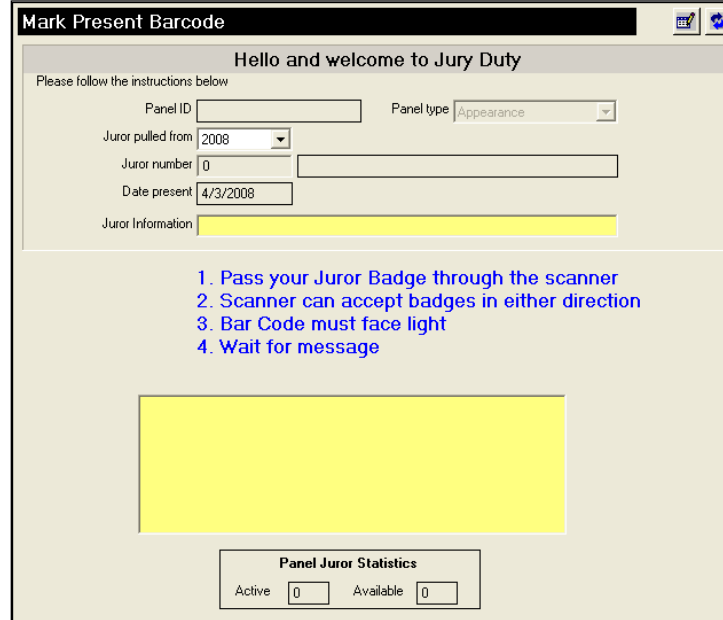


Figure 12.1: Mark Present Barcode Screen

Part II. Manually Mark Jurors as Present

Step 1. Access Mark Present Alpha/numerical Screen

1. Click to open the Appearance Panel Processing folder on the Menu Tree.
2. Select **Mark Present Alpha/numerically**.

Step 2. Mark One Juror as Present

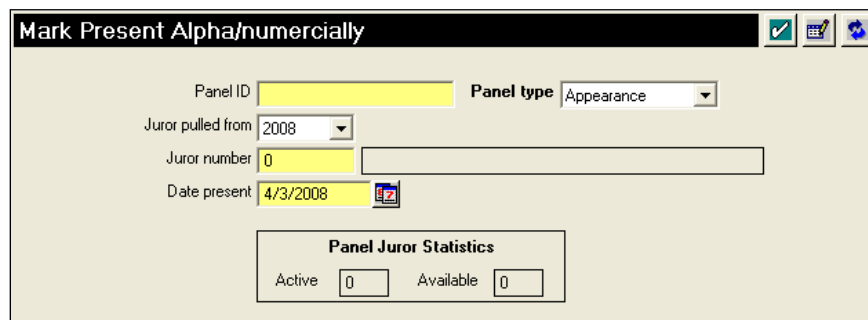



Figure 12.2: Mark Present Window

1. Enter a **Panel ID**. You can double-click in this field to select from a list of panels.
2. Enter the juror's number. You can double-click in this field to select a juror.
3. Verify that the **Panel type** and **Date present** fields are correct. Change these if necessary.
4. Click  to save, and a **Mark Present** screen opens.

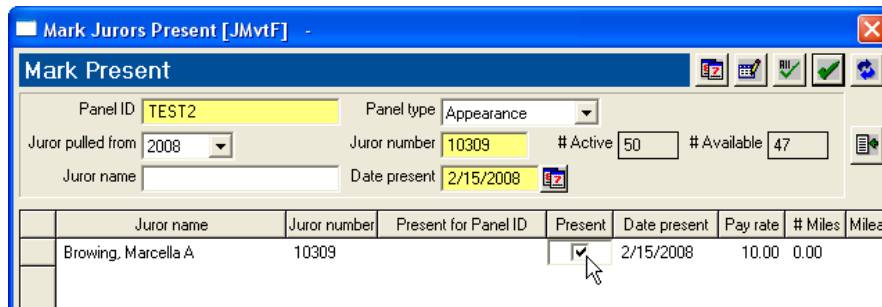




Figure 12.3: Mark Present Screen-Mark One Juror

5. Double-click in the **Present** checkbox and click  to save and create the pay record.

Part III. Manually Mark Multiple Jurors or All Jurors as Present

Step 1. Access Mark Present Screen

1. Click to open the **Appearance Panel Processing** folder on the **Menu Tree**.
2. Select **Mark Present Alpha/numerically**.
3. Enter a **Panel ID**. You can double-click in this field to select from a list of panels.
4. Verify that the **Panel type** and **Date present** fields are correct. Change these if necessary.
5. Click , and a **Mark Present** screen opens.

Step 2. Mark Multiple Jurors as Present

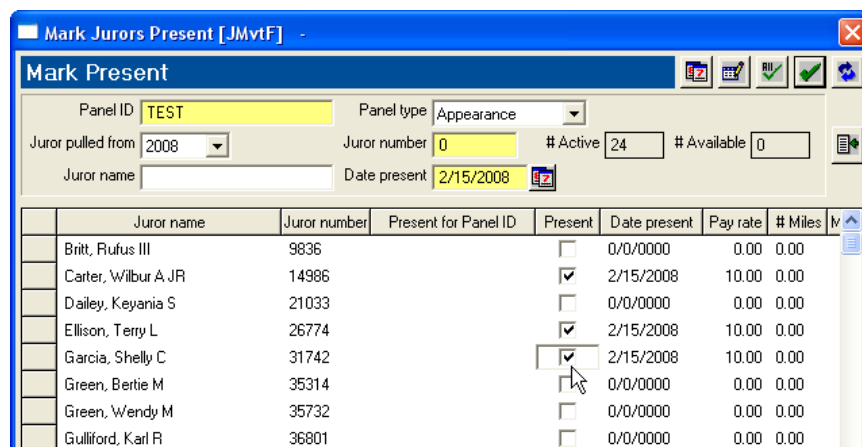




Figure 12.4: Mark Present Screen-Mark Multiple Jurors

Double-click in the corresponding **Present** checkbox to mark each juror as present.



Step 3. Mark All Jurors in the Panel as Present

1. Click the **All**  button, and a checkmark displays in all **Present** checkboxes.
2. Click  to save and create the pay records.
3. Click **Yes** to confirm, and the **Present** boxes across from each juror's name are automatically checked.



Part IV. Manually Mark Jurors Present from the Appearance Panel

You can mark one or multiple jurors as present from the Appearance Panel.

Step 1. Access Appearance Panel



1. Click to open the Appearance Panel Processing folder on the Menu Tree.
2. Select **Appearance Panel Wide**.
3. Highlight the appearance panel.

Step 2. Mark Juror Present

1. Click the **Mark Jurors Present**  button, and the Mark Present screen opens.
2. Mark jurors present (as explained in Part III) or use the search feature (as explained in Part II) to locate an individual juror to mark present.
3. Click  to save and create pay records.

Part V. Print Juror Present List Report

Print this report after jurors have been scanned in or have been are marked as present in the Jury Management System. This report is given to the judge.

1. Click to open the **Appearance Panel Processing** folder on the **Menu Tree**.
2. Select **Appearance Panel Wide**.
3. Locate and highlight the **Appearance Panel** to run the report on.
4. Click the **Print**  button, and the **Report Control Appearance** window opens.
5. Select a **Juror Present List** for a report.
6. Click the **Print**  button.



Dorchester County Courthouse

Roll call list for Jurors Present

Filtered by: Panel ID, Court Agency Code **Sorted by:** Juror Name

SEQ#	SSN	NAME	JUR#	RACE	SEX	DOB	#XFER	DEFERRED	DTE	CMNT/PAY
2	1795	Aldret, Richard C II	809	W	M	11/27/1979	0	___/___/___	_____	_____
3	7009	Aldridge, Edmund C III	819	W	M	2/10/1945	0	___/___/___	_____	_____
5	1529	Alexander, Anita E	852	W	F	9/7/1931	0	___/___/___	_____	_____
7	3066	Barrineau, Robert	4300	W	M	10/19/1984	0	___/___/___	_____	_____
8	5512	Beasley, Christie L	5056	W	F	3/23/1973	0	___/___/___	_____	_____
10	8351	Bezlev, Joseph R	5328	W	M	11/1/1988	0	___/___/___	_____	_____
11	9568	Bentley, Kama E	5945	W	F	7/8/1957	0	___/___/___	_____	_____
12	8472	Bordonaro, Patrick A	7935	W	M	7/30/1979	0	___/___/___	_____	_____
13	7028	Bounds, Anne E	8110	W	F	10/6/1925	0	___/___/___	_____	_____
14	9355	Bowers, Linda L	8269	W	F	10/3/1945	0	___/___/___	_____	_____
15	3039	Brickle, Wesley D	9466	W	M	12/8/1985	0	___/___/___	_____	_____

Figure 12.5: Example Juror Present List Report



Notes



Lesson 13: Juror Excused by Judge

After jurors are selected, the judge may opt to excuse a juror. This lesson explains how to excuse a juror in JMS. Being excused does not affect the juror’s payment for the day they appeared in court.

Step 1. Access Appearance Panel

1. Click to open the Appearance Panel Processing folder on the Menu Tree.
2. Select **Appearance Panel Wide**.
3. Locate and open the panel (highlight and double-click) that contains the juror to excuse.

Step 2. Locate the Juror and Change Status

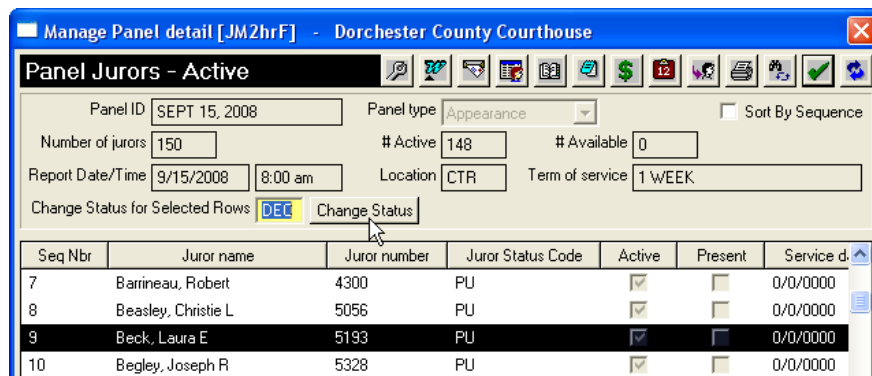



Figure 13.1: Change Status for Excused Juror

1. Use search features to locate the juror and highlight the row.
2. Double-click in the **Change Status for Selected Rows** field, and a Select window opens.
3. Select **Excused by Judge (EXJ)** as the reason for excusing the juror.
4. Click the **Change Status** field. The juror disappears from the Active Juror list and can now be viewed in the Inactive Juror list using the **Toggle**  button.

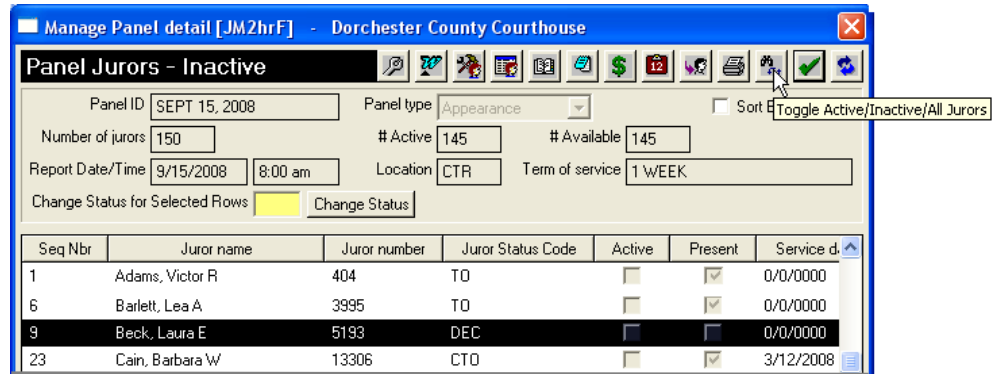


Figure 13.2: Toggle to Inactive Jurors

An excuse letter prints for the juror as proof they were excused by the court. They are still paid for mileage as they were marked as present.



Lesson 14: Protect a Juror

You can protect a juror from serving for one or two court dates. For example, if a juror has dental surgery scheduled and needs to be protected from the surgery date and one day to recover. You can opt to use either set of instructions explained in this lesson.

Lesson Objectives

- ❖ Protect a juror from one or two court dates.

Option 1: Mark Not Present

1. Click to open the **Appearance Panel Processing** folder on the **Menu Tree**.
2. Select **Appearance Panel Wide**.
3. Locate and double-click the Appearance Panel that contains the juror to protect. Lesson 3 (Section 1) provides instructions for locating a juror's panel.

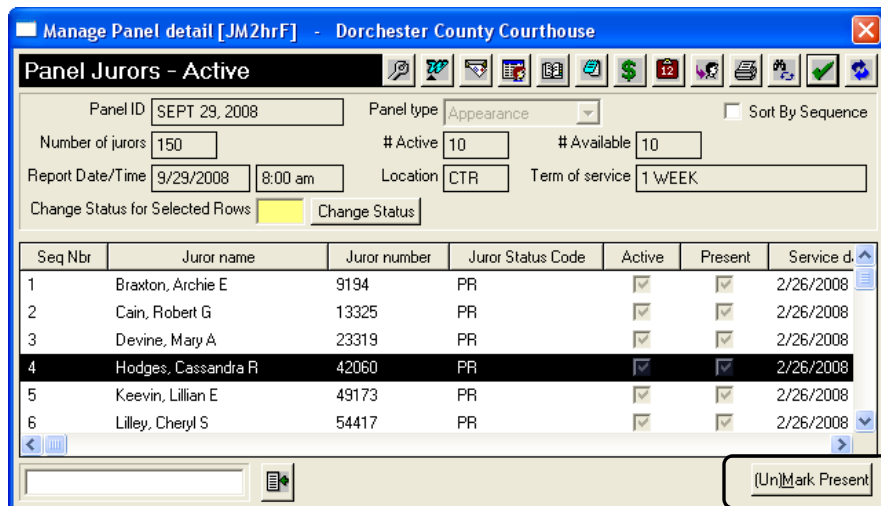


Figure 14.1: Select Juror to Protect

4. Highlight the juror to protect.
5. Click the **(Un)Mark Present** button to unmark the juror as present. This does not affect the juror's payment.
6. Remember to mark the juror present again so they can be available for the next trial. See instructions in Lesson 12, Part II or Part IV.



Option 2: Conflict Date

1. Click to open the **Appearance Panel Processing** folder on the **Menu Tree**.
2. Select **Appearance Panel Wide**.
3. Double-click the panel that contains the juror to protect.
4. Locate the juror to protect.

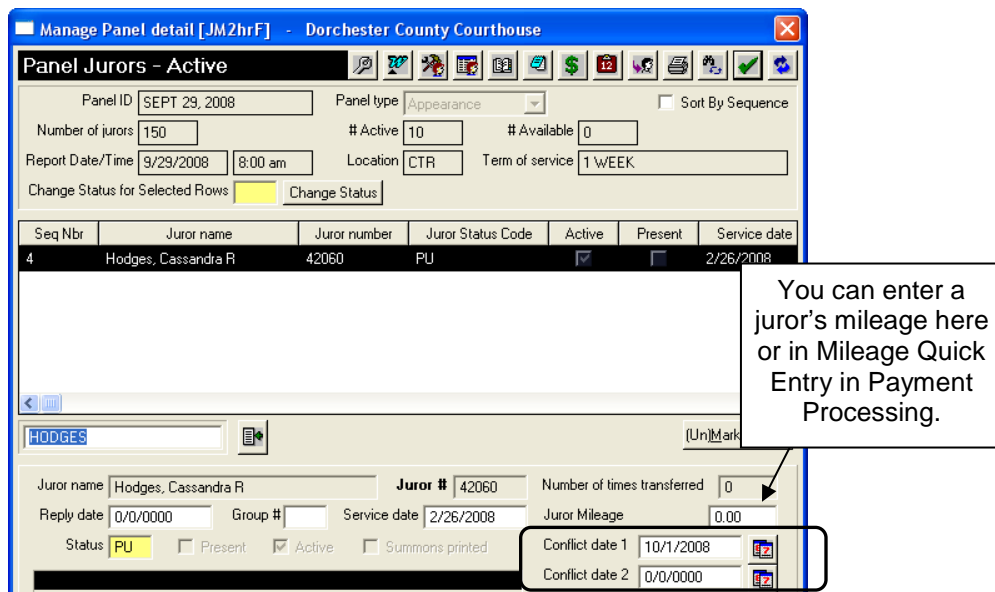


Figure 14.2: Conflict Dates

5. Enter the protection date in the **Conflict date 1** field. The dates in these fields protect the juror from being selected in the random strike selection in Trial Panel Processing.

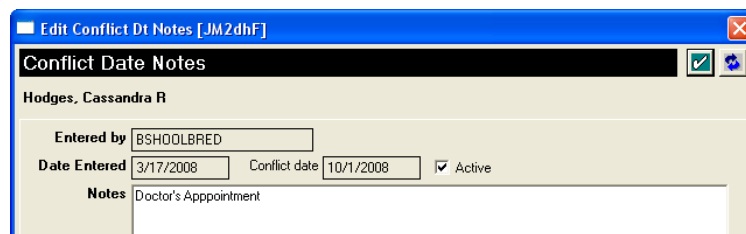




Figure 14.3: Conflict Date Notes Window

6. When the **Conflict Date Notes** window opens, enter an explanation for protecting the juror on that date
7. Click  to save **Conflict Date Note**, and the Appearance Panel screen re-opens. If the juror needs an additional protection date, enter that date in the **Conflict date 2** field and enter notes for that date and save.
8. Click the **Save**  button on the **Appearance Panel** screen to apply your changes.



Lesson 15: Create Trial Panels

You create a Trial Panel for the trials for that day or service period. Trial Panels can be created the day of court (General Sessions) or created ahead of time (Common Pleas).

Lesson Objectives

- ❖ Create a new trial panel.

Step 1. Access Trial Panel Wide




Figure 15.1: Jury Master Wide Selection

Open the **Trial Panel** folder and select **Trial Panel Wide**.

Step 2. Create a Trial Panel

Panel ID	2007CP4200001	Panel type	Trial
Description	2007CP4200001		
Term of service	1 week	Report Date/Time	3/1/2008 12:00 am
Location	CTR		
Number of jurors	47	# Active	45
		# Available	45
Jury type	SGJ	Judge	
		Trial type	
Trial From	3/1/2008	To	3/1/2008
<input type="checkbox"/> Finalized	Date	0/0/0000	Panel Floor
Last Update:			

Figure 15.2: New Trail Panel

1. Click the **New**  button to prepare for creating a new Trial Panel.
2. Enter a **Panel ID** of up to fifteen characters and spaces. It is recommended that you use the CMS case number to identify the trial panel. Note that the **Description** mimics the data typed into the **Panel ID** field. You can change the description if necessary before saving the panel.
3. Enter a **Term of service**, the length of the court dates for this panel, such as 1 WEEK or 3 DAYS.



4. Enter the time and date for the jurors to report to the court. This time and date is used in the notification letter sent to the jurors.
5. Enter the court **Location**.
6. Enter the **Number of jurors** needed for a jury pool for this trial.
7. Double-click in the **Jury type** field to open a Select window that lists all the jury types available for your court.

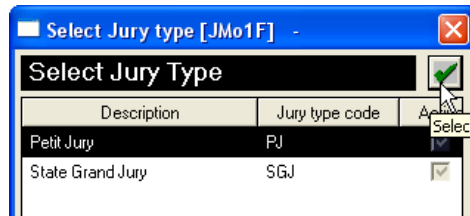


Figure 15.3: Select Jury Type Window

8. Highlight the jury type, and click the **Select** button.
9. Enter the **Judge** or **Trial type**, if known. These are optional entries. Double-click in these fields to open a Select window that lists judges and trial types for your court.
10. Click the **Save** button to save the panel record. It displays in the grid area of the **Trial Panel Wide** screen.

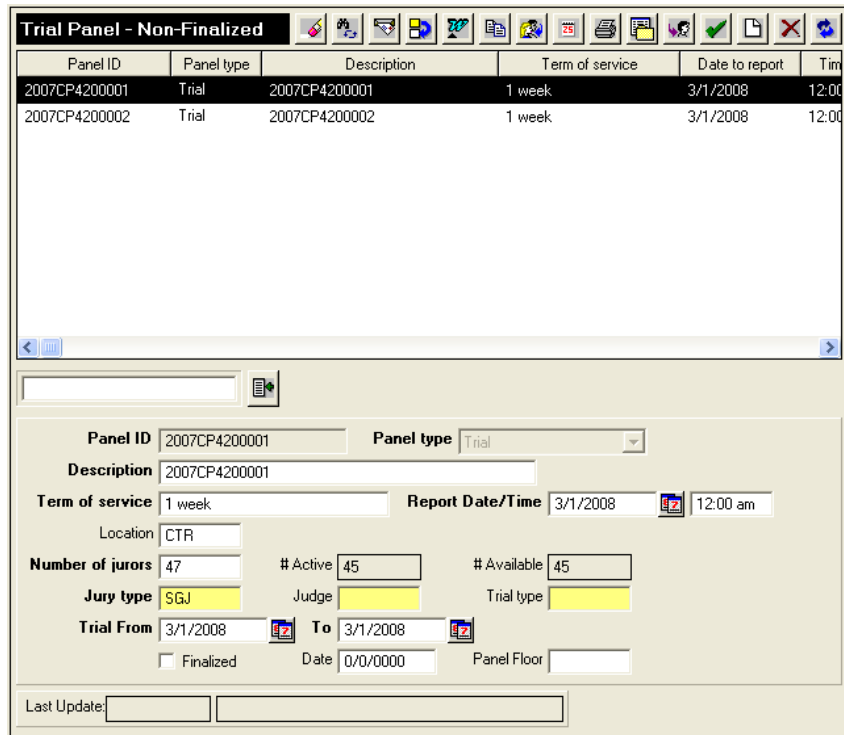


Figure 15.4: Trial Panel Saved to Grid



Lesson 16: Pull Jurors for a Trial

After creating trial panels, you pull jurors from the Appearance Panel to appoint them to a trial panel. The trial panel contains all potential jurors that are questioned and either accepted or rejected by the attorneys. As an example, you would pull 18 jurors into a trial panel. This would provide enough potential jurors for attorney refusals, 12 jurors and 1 alternate.

Lesson Objectives

- ❖ Pull jurors into Trial Panel from Appearance Panel.
- ❖ Print a Strike Sheet.

Step 1. Access Trial Panel Wide

Open the **Trial Panel** folder and select **Trial Panel Wide**.

Step 2. Open the Pull Jurors Window

Panel ID	Panel type	Description	Term of service	Date to report	Time
2007CP4200001	Trial	2007CP4200001	1 week	4/2/2008	12:00
2007CP4200002	Trial	2007CP4200002	1 week	4/2/2008	12:00

Figure 16.1: Pull Jurors for Trial Panel

Click the **Pull Jurors**  button.



Step 3. Pull Jurors

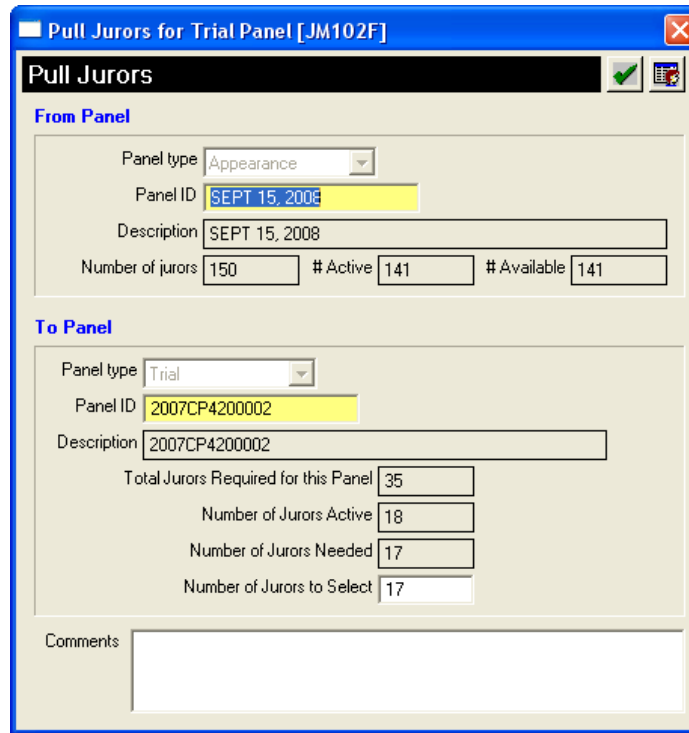



Figure 16.2: Pull Jurors Window

1. Enter the **Panel ID** for the Appearance Panel to pull jurors from. You can double-click in this field to open a Select window that lists all active Appearance Panels.
2. Click the **Save**  button to continue.
3. Click **OK** when the verification message prompt opens.

When the Trial Panel Wide screen opens, the newly created Trial Panel displays in the grid.

Step 4. Print Strike Sheet

Panel ID	Panel type	Description	Term of service	Date to report	Time
2007CP4200001	Trial	2007CP4200001	1 week	3/1/2008	12:00
2007CP4200002	Trial	2007CP4200002	1 week	3/1/2008	12:00

Figure 16.3: Print Reports

1. Highlight the **Trial Panel** in the grid.
2. Click the **Print**  button.

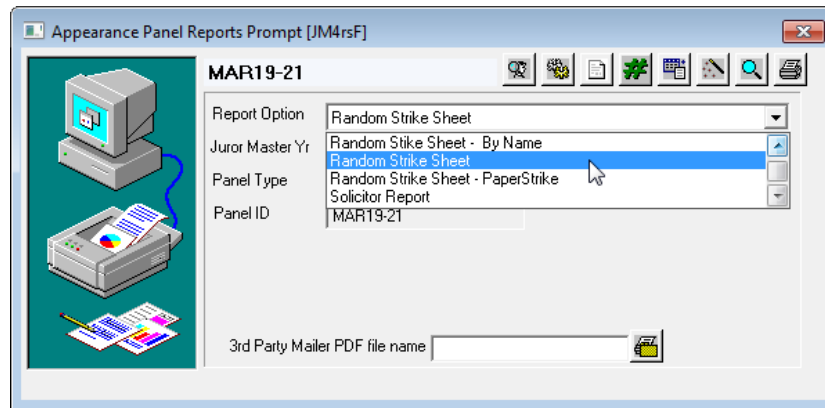



Figure 16.4: Random Strike Sheet

3. Select **Random Strike Sheet** in the Trial Panel Report window. Fields relevant to the trial display (year, panel type, Panel ID).
4. Click the **Print**  button.

Dorchester County Courthouse
RANDOM STRIKE SHEET

JUDGE NAME :
TRIAL TYPE :
PANEL ID : 2007CP4200001
COURTROOM CTR

Sorted by: Random Nbr
Trial

DESCRIPTION : 2007CP4200001

NAME	JUROR NBR	RACE	SEX	ST/PLTFF	DEF	CRT	REMARKS
1 Hardy, Veronica	30	B	F	()	()	()	_____
2 Carroll, Linda L	8	W	F	()	()	()	_____
3 Lawson, Shane T	39	W	M	()	()	()	_____
4 Geddis, Inez Mary	24	B	F	()	()	()	_____
5 Lima, Amy B	40	W	F	()	()	()	_____
6 Duncan, Charlene W	17	W	F	()	()	()	_____
7 Elder, Maria I	19	W	F	()	()	()	_____
8 Kenna, Beth A	36	W	F	()	()	()	_____
9 Craig, Charles D	12	W	M	()	()	()	_____

Figure 16.5: Example Random Strike Sheet



Notes



Lesson 17: Return Jurors to the Appearance Panel

When jurors are seated or excused from a trial, you can use on of several ways to return jurors who were not selected for a trial to their Appearance Panel. They can then be re-selected when you pull jurors into another Trial Panel.

Lesson Objectives

- ❖ Return jurors that have not been selected for the trial to the Appearance Panel.

Option 1: Quick Return Jurors

1. Open the **Trial Panel** folder and select **Trial Panel Wide**.
2. Highlight the **Trial Panel** in the grid.

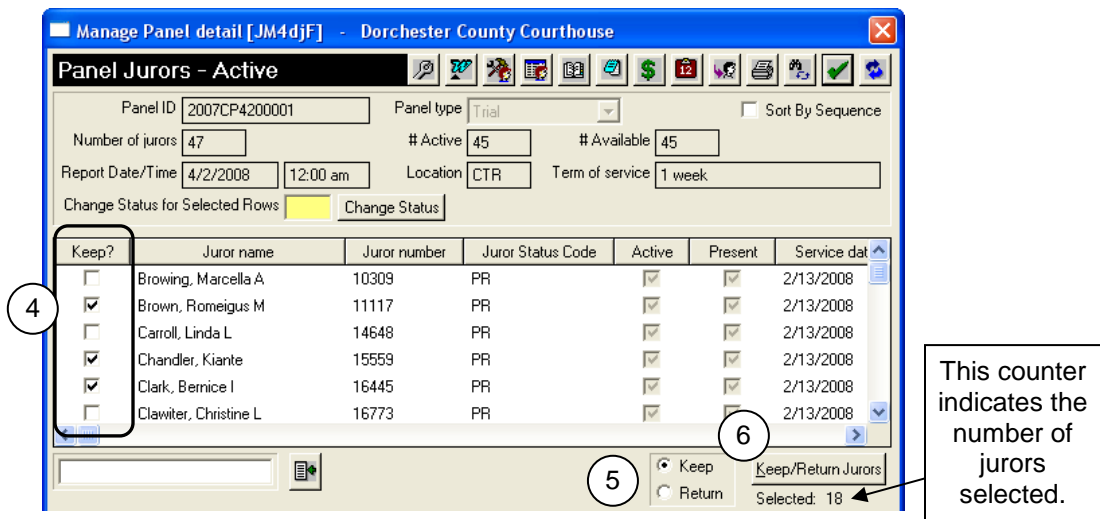



Figure 17.1: Panel Jurors Window

3. Click the **Quick Return Jurors**  button, and the Panel Juror screen opens, which lists all the jurors pulled for this Trial Panel.
4. Click the **Keep?** checkbox next to the jurors selected for trial.
5. When all jurors have been selected, verify that the **Keep** radio button is selected.
6. Click the **Keep/Return Jurors** button, and a message prompt opens.

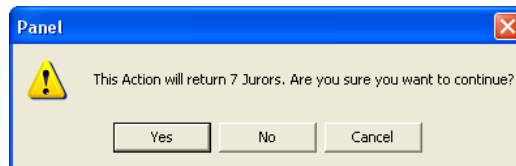


Figure 17.2: Verification Message Prompt

7. Click **Yes** to this message prompt.



Option 2: Return One or More Jurors

1. Open the **Trial Panel** folder and select **Trial Panel Wide**.
2. Double-click the **Trial Panel** in the grid.

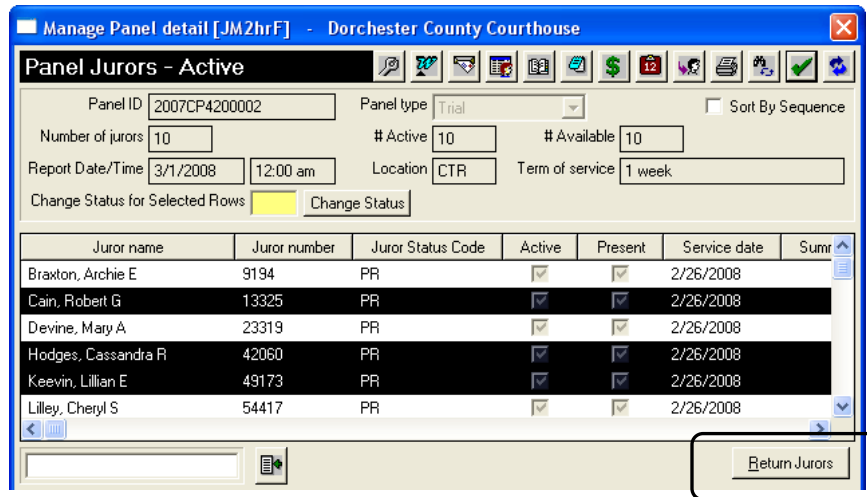


Figure 17.3: Return Selected Jurors

3. Highlight the jurors to return. Use the **CTRL** key to select multiple jurors.
4. Click the **Return Jurors** button.

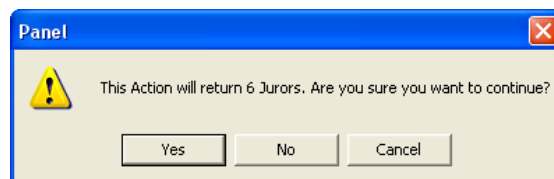


Figure 17.4: Verification Message Prompt

5. Click **Yes** when the Panel Verification Message Prompt opens.

Option 3: Return All Jurors

If the case is settled before the trial begins, you can return all jurors to their Appearance Panel.



1. Open the **Trial Panel** folder and select **Trial Panel Wide**.
2. Highlight the **Trial Panel** in the grid. **Do Not** double-click on the Trial Panel.
3. Click the **Return All Active Jurors**  button.



Figure 17.5: Return All Jurors

4. Click  to complete the return process.



Notes



Lesson 18: Retrieve Jurors Returned to the Appearance Panel

At times you may find that you mistakenly returned a juror to the Appearance Panel from the Trial Panel. This lesson explains how to retrieve that juror and return them to the Trial Panel.

Objective

- ❖ Retrieve juror from the Appearance Panel and return them to the Trial Panel.

Step 1. Access the Trial Panel

1. Open the **Trial Panel** folder and select **Trial Panel Wide**.
2. Highlight the **Trial Panel** in the grid.

Step 2. Open the Pull Jurors Window

Panel ID	Panel type	Description	Term of service	Date to report	Time
2007CP4200001	Trial	2007CP4200001	1 week	4/2/2008	12:00
2007CP4200002	Trial	2007CP4200002	1 week	4/2/2008	12:00

Figure 18.1: Pull Jurors for Trial Panel

Click the **Pull Jurors**  button.



Step 3. Select the Appearance Panel the Juror was Returned to

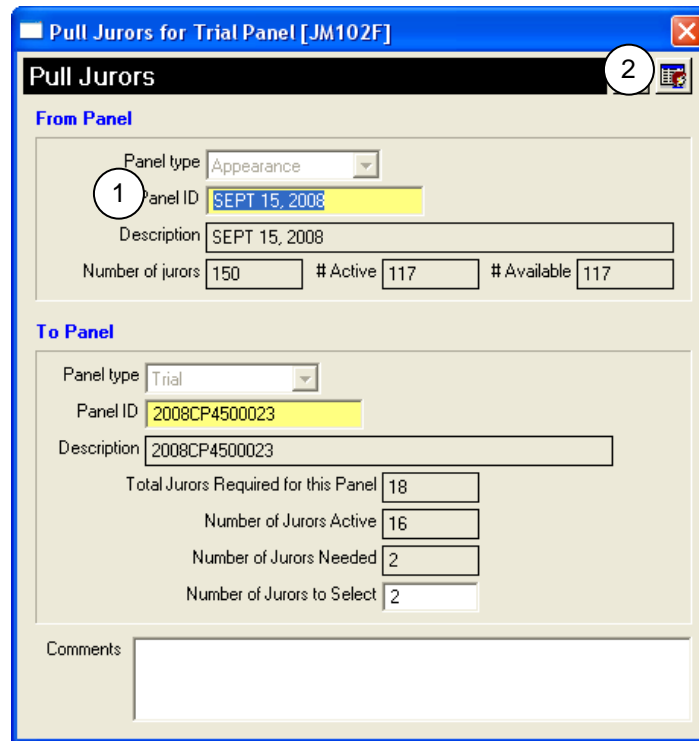



Figure 18.2: Enter Appearance Panel the Juror was Pulled from

1. Enter the Panel ID number of the Appearance Panel the juror was pulled from.
2. Click the  button to open the Select Juror's screen.

Step 4. Select Juror(s) to Retrieve

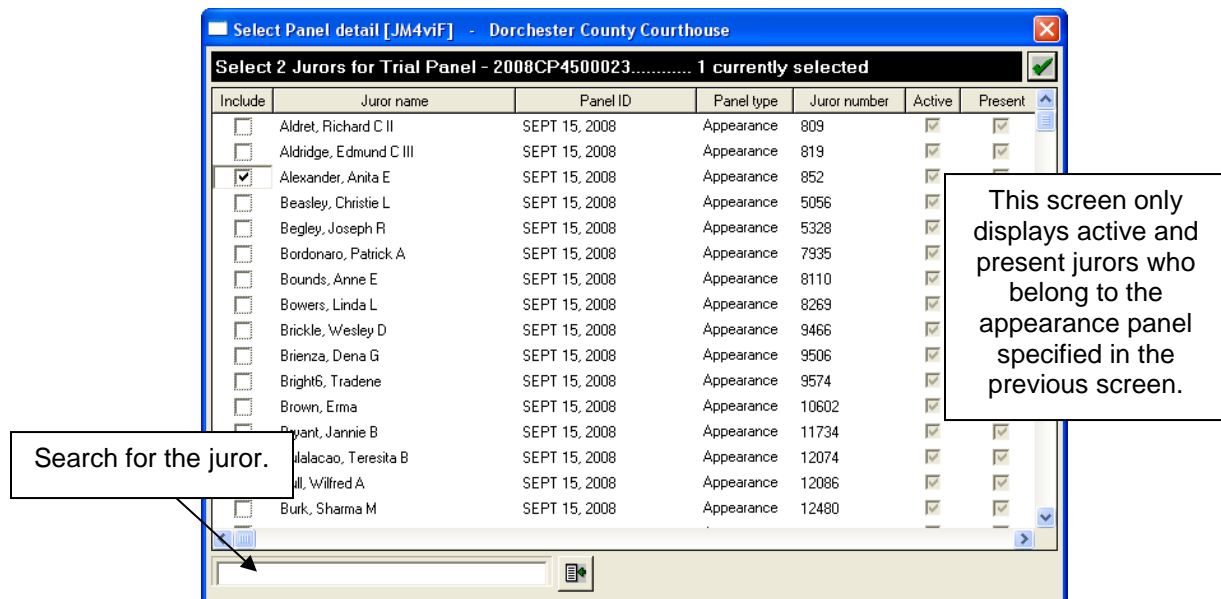


Figure 18.3: Select the Juror(s) to Retrieve



1. Double-click in the **Include** box to select jurors to retrieve from the Appearance Panel.
2. Click to retrieve the selected juror(s), and a message prompt opens.



Figure 18.4: Verification Message Prompt

3. Click **OK**, and the window closes.



Notes



Lesson 19: Print or Re-shuffle a Random Strike Sheet

This lesson explains how to print a Random Strike Sheet or re-shuffle a Random Strike Sheet (for courts that do not use a Trial Panel).

Lesson Objectives

- ❖ Print a Random Strike Sheet.
- ❖ Re-shuffle a Random Strike Sheet.

Part I. Print a Random Strike Sheet

Step 1. Access the Appearance Panel.

1. Click to open the Appearance Panel Processing folder on the Menu Tree.
2. Select **Appearance Panel Wide**.
3. Highlight the panel.

Step 2. Access the Report Window

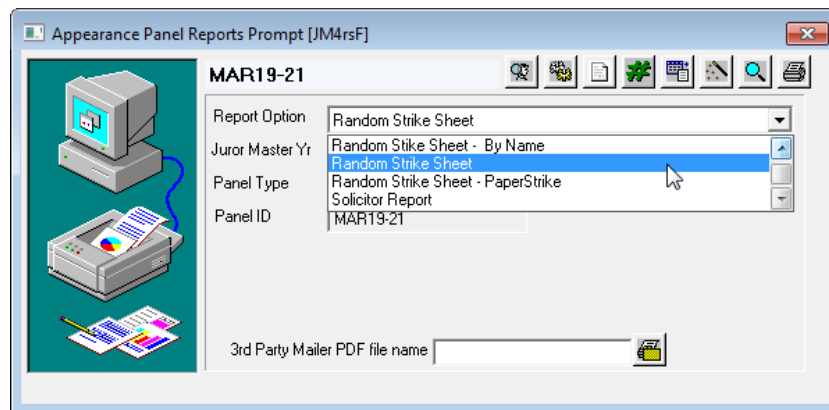



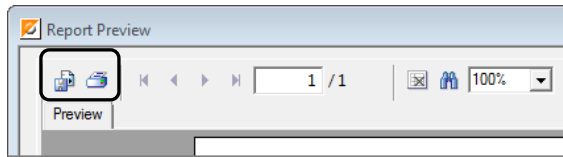


Figure 19.1: Report Control Window

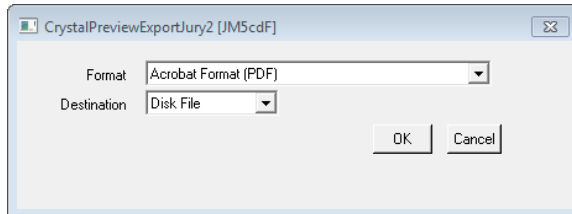
Note The 3rd Party Mailer PDF file name field is only used by court agencies that send print jobs to a 3rd party printing vendor.


1. Click the **Print**  button.
2. Select **Random Strike Sheet** from the **Report Option** dropdown list.
3. Click the **Print**  button or click the **Preview**  button to first display the Random Strike Sheet on the computer screen.



When previewing a report on your computer screen, you can print or export the report. Files can be exported in these formats: PDF, XLS, DOC, TXT, CSV, and RTF.

Note



Click the Export  button, and the Export window opens. Select the Format, then select the Destination of Disk File or Email. Click OK to proceed.

Part II. Re-shuffle a Random Strike Sheet

This process is typically used by Magistrates or Municipal Courts that don't use the trial panel. However, if necessary, you can also re-shuffle the Random Strike Sheet from the Trial Panel.

In magistrate court, this re-shuffle procedure is used to pull several juries quickly when there is no time to move jurors back and forth from the trial panel to the appearance panel.

Note You can use these same instructions to re-shuffle a Random Strike Sheet for a Trail Panel from Trial Panel Processing.

Step 1. Access the Appearance Panel.

1. Click to open the Appearance Panel Processing folder on the Menu Tree.
2. Select **Appearance Panel Wide**.
3. Highlight the panel to re-shuffle.

Step 2. Access the Report Window

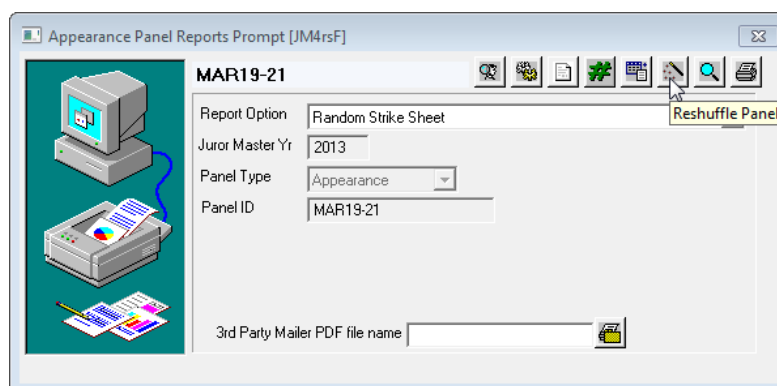
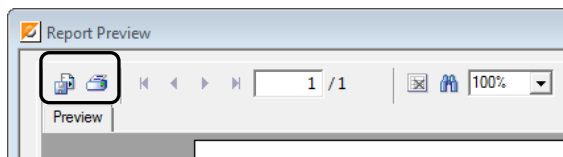


Figure 19.2: Report Control Window



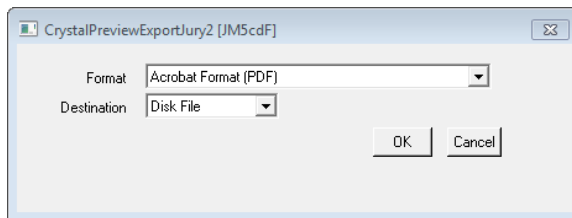
1. Click the **Print**  button.
2. Select the **Random Strike Sheet** from the **Report Option** dropdown list.
3. Click the **Re-Shuffle Appearance Panel**  button and **Print**  or **Preview**  the Random Strike Sheet.


You can re-shuffle the strike sheet as many times as needed to change the order of your jurors.



When previewing a report on your computer screen, you can print or export the report. Files can be exported in these formats: PDF, XLS, DOC, TXT, CSV, and RTF.

Note



Click the Export  button, and the Export window opens. Select the Format, then select the Destination of Disk File or Email. Click OK to proceed.



Notes



Section 3:

Payment Processing and Financials

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Notes



Lesson 20: Enter Juror Mileage

This lesson explains two ways to add mileage to a juror’s record.

Lesson Objectives

- ❖ Add mileage to juror records in Mark Present Alpha/numerically.
- ❖ Add mileage to juror records in Quick Mileage Entry.

Part I. Quick Mileage Entry

Follow these steps for each day the juror reports to court.


Step 1. Access Mileage Quick Entry

1. Click to open the **Payment Processing** folder on the **Menu Tree**.
2. Select Mileage Quick Entry.
3. Enter the **Service from** and **Service to** dates. Use the **Jury Present List** report for these dates.

Step 2. Enter Mileage

Svc Date	Juror #	Name	# Days	# Miles	Mileage rate	Amount	Pay rate	Fr
2/13/2008	289	Adams, Emma J	1	12.50	0.400	15.00	10.00	
2/13/2008	333	Adams, Joshua A	1	0.00	0.400	10.00	10.00	
2/13/2008	10309	Browing, Marcella A	1	9.00	0.400	13.60	10.00	
2/13/2008	11117	Brown, Romeigus M	1	5.00	0.400	12.00	10.00	
2/13/2008	14648	Carroll, Linda L	1	8.00	0.400	13.20	10.00	
2/13/2008	15559	Chandler, Kiante	1	0.00	0.400	10.00	10.00	
2/13/2008	16445	Clark, Bernice I	1	10.00	0.400	14.00	10.00	
2/13/2008	16773	Clawiter, Christine L	1	0.00	0.400	10.00	10.00	


Figure 20.1: Mileage Quick Entry Screen

1. Click on the **# Mileage** field corresponding to the juror and enter the mileage.
2. Click on the next juror, and the pay amount is automatically calculated.
3. Save  when finished.



Part II. Mark Present Alpha/numerically

Step 1. Access Mark Present Screen

1. Click to open the Appearance Panel Processing folder on the Menu Tree.
2. Select Mark Present Alpha/numerically.
3. Enter a **Panel ID**. You can double-click in this field to select from a list of panels.
4. Verify that the **Panel type** and **Date present** fields are correct. Change these if necessary.
5. Click , and the **Mark Present** screen opens.

Step 2. Enter Mileage

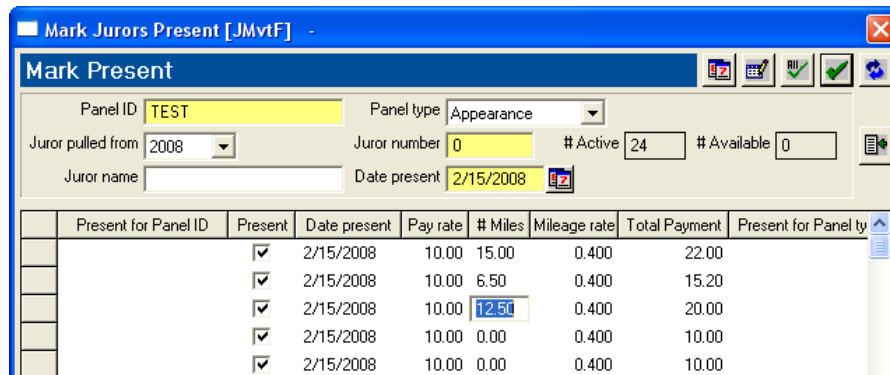




Figure 20.2: Mark Present Screen-Enter Mileage

1. Scroll to the right of the screen until the **# Miles** column is visible.
2. Click to activate the **# Miles** field.
3. Enter the mileage the juror traveled, and press the ENTER or TAB key. The **Total Payment** is calculated.
4. When you finish entering mileage, click  to create payroll records. This process makes it possible to print checks and financial reports.
5. Close  the screen when finished.



Lesson 21: Print Payment Vouchers for Jurors

If your court does not print checks, you can print pay vouchers for jurors after their mileage has been entered.

Lesson Objectives

- ❖ Print vouchers to pay jurors for mileage.

Step 1. Access Appearance Panel

1. Click to open the Appearance Panel Processing folder on the Menu Tree.
2. Select Appearance Panel Wide.
3. Locate the Appearance Panel that contains the juror to pay.

Step 2. Select Jurors to Pay

4. Double-click to open the Juror Manage window for the Appearance Panel.
5. Select the jurors to pay with one of these methods:
 - Highlight a juror, hold down the left mouse button, and slide the mouse.
 - Hold down the CTRL key and left click each juror.
 - Highlight a juror, hold down the SHIFT key, left click juror, highlight another juror, and left click.

Step 3. Print Vouchers

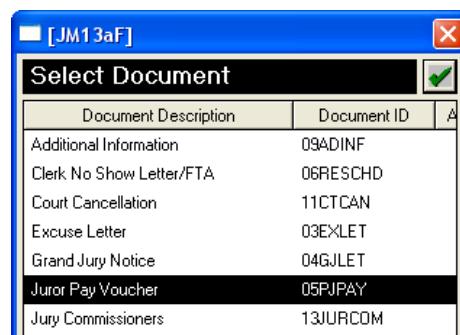



Figure 21.1: Select Document Window

1. Click the **Print Document**  button, and a Select window opens.
2. Select **Juror Pay Voucher**, and vouchers print for jurors in the Appearance Panel.



TELEPHONE (843) 563-0121 FAX (864) 898-5863 EMAIL LJetteG@Co.Pickens.SC.US	Office of Clerk of Court Dorchester COUNTY Cheryl L. Graham - CLERK 101 Ridge Street St. George, SC 29477	CIVIL RECORDS (864) 898-5862 CRIMINAL RECORDS (864) 898-5864 FAMILY COURT (864) 898-5919
STATE OF SOUTH CAROLINA) DORCHESTER)		
<p>I, Cheryl L. Graham, Clerk of Court for Dorchester, South Carolina, hereby certify that RICHARD C MARTIN has served as a Petit Juror for Dorchester for 2 days, the week of 10/22/2008.</p> <p>He/she was paid \$10.00 per day, for a total of \$20.00.</p>		
Pickens, SC September 19, 2008		<hr/> Cheryl L. Graham Clerk of Court

Figure 21.2: Example Payment Voucher



Lesson 22: Print Checks

This lesson explains how to print a pay file to send to Finance for paying jurors.

Lesson Objectives

- ❖ Print a JMS Pay file to send to Finance.

Step 1. Access Print Checks Window

You can print checks by a date range, by an Appearance Panel, or for one juror. You can also print Miscellaneous checks for purposes other than days served.


Figure 21.1: Print Checks Screen

1. Open the Payment Processing folder and select Print Checks.
2. **Print for Days Served:**
Enter the **Begin** and **End date** *or* click the **Panels** button to select one or more Appearance Panels or Trial Panels.


Print a Miscellaneous Check:

Enter the **Payee name** and check **Amount**. Enter their address information if the check is to be mailed.

Print for One Juror:

Enter the Juror number, and the **Juror Present Date**  button is enabled. Use this button to review and modify any unpaid payment detail records that exist for the juror.

Print for Multiple Jurors on a Panel:

Click the **Multiple Juror by Panel**  button. Choose a panel from the Select Panel window. When the Select Panel Jurors for Check window opens. Click the **Include** checkbox to select a juror to pay.

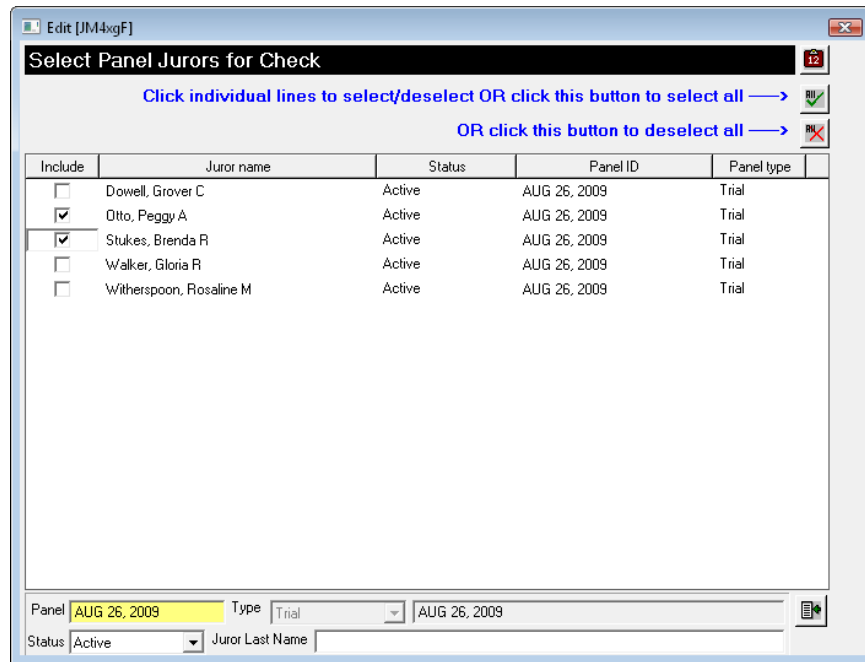


Figure 22.2: Select Jurors Window

3. Close the **Select Panels** window, and the Print Checks window re-opens.

If multiple jurors have been selected, an Erase button allows for unchecking the selected jurors if necessary. You can then re-select jurors.

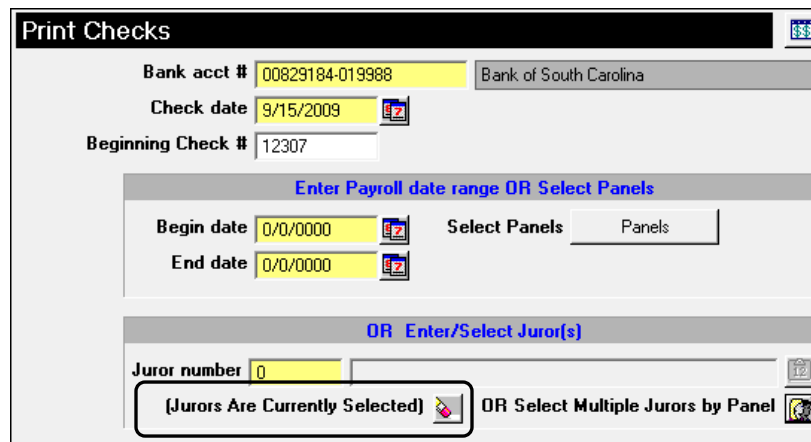




Figure 22.3: Erase Payment Setting for Selected Jurors



Step 2. Generate Check Verification Report and Process Checks

1. Click the **Assign Check Numbers**  button to generate the Check Verification Report.
2. Carefully review the check verification report.
3. When the check verification report is correct, click the **Check Processing**  button to create the JMSPAY file for Finance.

You can print your check verification report as many times as needed before you click the **Check Processing** button. However, once you click the **Check Processing** button, you will not be able to generate the check verification report again.

Note The JMS Pay File is saved on a folder set up by your CMS Administrator. You can either email the file to finance from this directory or let finance know it is available for them to get.



Notes



Lesson 23: Reprint Checks

This lesson explains how to re-print a check. You must have the identification number(s) of the printed check before you can reprint the check(s).

Original checks must be voided before they can be reprinted.

Lesson Objectives

- ❖ Void check(s) that are to be reprinted.
- ❖ Reprint the voided check.

Part I. Void the Original Check

Before reprinting checks, change the Check status in Bank Account details to void all checks that need to be reprinted.

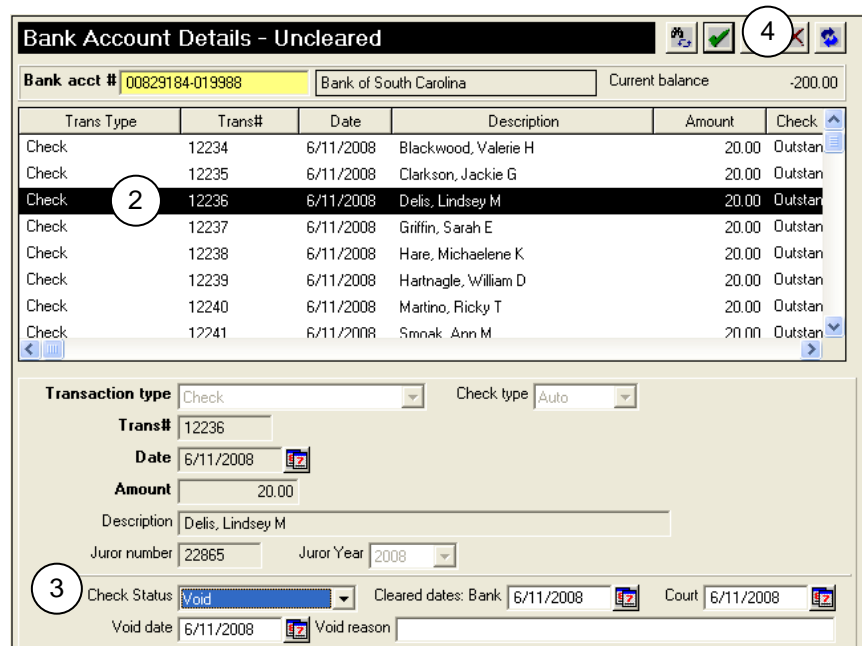



Figure 23.1: Void Check in Bank Account Details

1. Open the **Financial** folder and select **Bank Account Details**, and the screen opens with printed checks listed in the grid.
2. Highlight the check to void.
3. Select **Void** from the **Check Status** folder, and the date fields automatically show the current date. Change these dates as necessary.
4. Save  your changes.




Part II. Reprint the Check

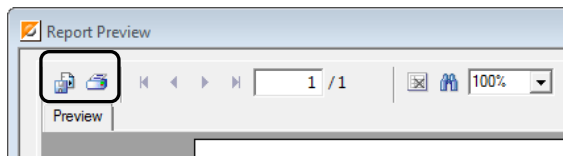
Figure 23.2: Reprint Checks Screen

1. Open the Payment Processing folder and select Reprint Checks.
2. Double-click in the **Bank acct #** field, if necessary, to select a bank account.
3. Enter the identification number of the old check(s). If only one check, enter that check number in both Old Check fields. For sequential check numbers, enter the beginning check number and ending check number.

The next available check number displays in the **New Begin Check #** field.

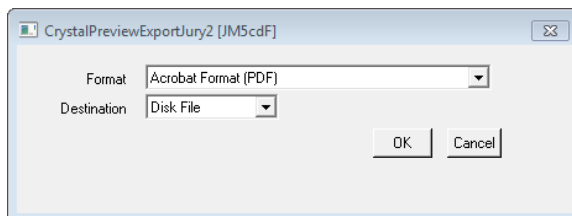
The current date displays in the **New Check date** field, which prints as the check date. You can change this date if necessary.


4. Click the **Print**  button, and the check prints with the newly assigned check number, and a **Check Verification** report displays on your computer screen for preview and printing.



When previewing a report on your computer screen, you can print or export the report. Files can be exported in these formats: PDF, XLS, DOC, TXT, CSV, and RTF.

Note



Click the Export  button, and the Export window opens. Select the Format, then select the Destination of Disk File or Email. Click OK to proceed.



Lesson 24: Reconcile a Bank Account

JMS provides several processes for bank reconciliation:

- Reconcile
- Automatic Bank Reconciliation (includes features for automatic or manual reconciliation)

Both functions are used to view and manage outstanding debits and credits in a bank account and both print a reconciliation report.

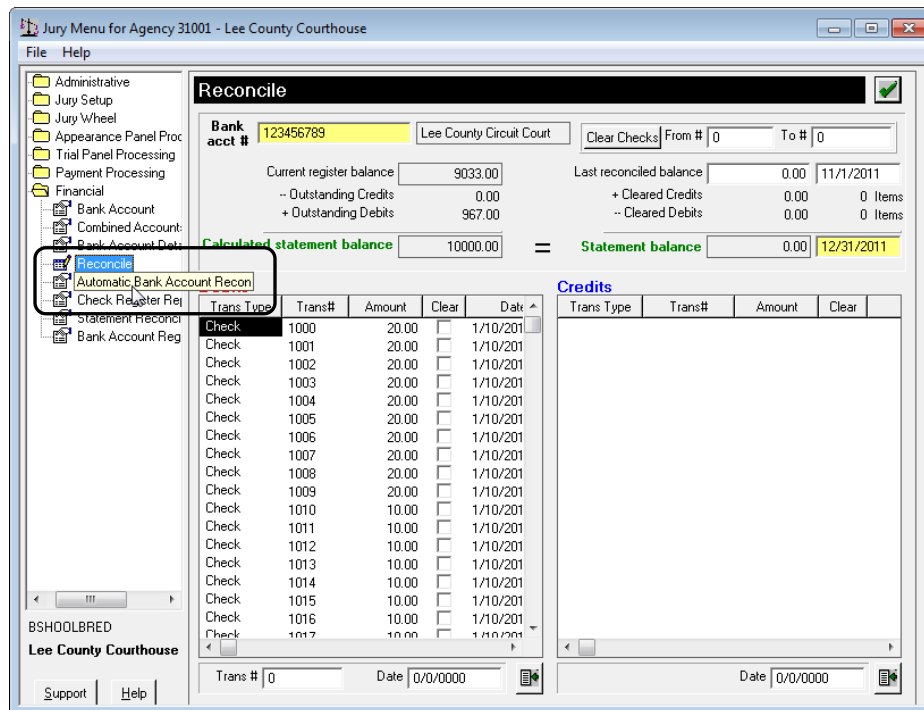


Figure 24.1: Bank Reconciliation Options

Lesson Objectives

- ❖ Mark checks that have cleared the bank account.
- ❖ Reconcile a bank account.
- ❖ Reconcile a bank with the automatic feature.

Part I: Reconcile

Step 1. Access the Reconcile Screen

Open the **Financial** folder and select **Reconcile**, and the screen opens with balance and statement balance information.

Checks that have not been cleared in JMS are listed in the Debits grid. Deposited amounts display in the Credits grid.



Reconcile

Bank acct # **00829184-019988** Bank of South Carolina Clear Checks From # 0 To # 0

Current register balance 5000.00 Last reconciled balance 5000.00 5/30/2008

-- Outstanding Credits 0.00 + Cleared Credits 0.00 0 Items

+ Outstanding Debits 80.00 -- Cleared Debits 120.00 6 Items

Calculated statement balance 5080.00 = **Statement balance** 4880.00 6/30/2008

Combined Accounts

Debits

Trans Type	Trans#	Amount	Clear	Date
Check	12234	20.00	<input type="checkbox"/>	6/11/2008
Check	12235	20.00	<input type="checkbox"/>	6/11/2008
Check	12237	20.00	<input checked="" type="checkbox"/>	6/11/2008
Check	12238	20.00	<input checked="" type="checkbox"/>	6/11/2008
Check	12239	20.00	<input checked="" type="checkbox"/>	6/11/2008
Check	12240	20.00	<input checked="" type="checkbox"/>	6/11/2008
Check	12241	20.00	<input checked="" type="checkbox"/>	6/11/2008
Check	12242	20.00	<input type="checkbox"/>	6/11/2008
Check	12243	20.00	<input checked="" type="checkbox"/>	6/11/2008
Check	12244	20.00	<input checked="" type="checkbox"/>	6/11/2008

Non-reconciled Debits

Credits

Non-reconciled Credits

Trans # 0 Date 0/0/0000

Current calculated balance based on the credit and debit transactions in your bank account details.

Statement balance, indicating first the last reconciliation date and balance amount.

Figure 24.2– Reconcile Screen

Balance Fields

These fields...	Provide this information...
Current register balance – Outstanding credits + Outstanding Debits Calculated statement balance	Calculation of the bank account balance by using the actual, current register balance, subtracting credits posted after the bank statement and adding debits entered the bank statement. The result should match with the balance shown on the bank statement.
Last reconciled balance + Cleared Credits – Cleared Debits Statement balance	Statement balance calculated by taking the last reconciled balance (that is, the ending balance shown on the previous bank statement), adding cleared credits and subtracting cleared debits. The result should match with the ending balance on the bank statement and with the calculated balance shown on the left side of the screen.

Step 2. Select Processed Items to Reconcile

1. Enter the reconciliation date in the **Statement balance** date field.
2. Using the electronic or paper account statement provided by your bank, locate each transaction in the credit or debit columns and place a check mark in the Clear checkboxes provided.

You can also clear groups of checks by entering a range of check numbers in the **From #** and **To #** fields and then clicking the **Clear Checks** button.



As you clear each item, you will notice that the amounts in the cleared credits, cleared debits, and items fields will increase.

When the statement balance amount matches the amount on your bank provided statement, you know that you are “in balance” with your bank. The calculated account balance will probably differ somewhat from the statement balance, as the calculated balance will reflect items which have not yet cleared the bank and therefore do not appear on the monthly bank statement.

Trans Type	Trans#	Amount	Clear	Date
Check	12234	20.00	<input type="checkbox"/>	6/11/2008
Check	12235	20.00	<input type="checkbox"/>	6/11/2008
Check	12240	20.00	<input type="checkbox"/>	6/11/2008
Check	12242	20.00	<input type="checkbox"/>	6/11/2008
Check	12244	20.00	<input type="checkbox"/>	6/11/2008

Figure 24.3: Enter Sequential Check Numbers to Reconcile

3. Save when all cleared checks have been marked, and a verification message prompt opens.

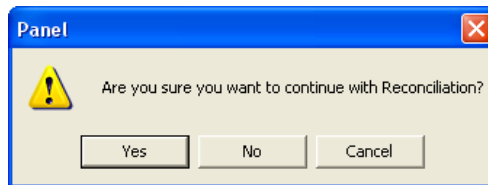


Figure 24.4: Reconcile Verification Message Prompt

The cleared checks disappear from the grid, and the balance information changes to reflect the newly cleared checks.


Record your reconciliation date, and your bank reconciliation is complete for the specified bank account.

Part II: Automatic Bank Account Reconciliation

The Automatic Bank Reconciliation function provides an automated method of reconciling a court agency’s bank account(s). Use this function to import a bank-provided text file containing checks that have cleared the bank and automatically matches them with the corresponding checks in the JMS system.

You can also use this function in manual mode without taking advantage of the import functionality by manually clearing checks on the screen from the bank provided account statement.



By default, the function operates in “Automatic Reconciliation” mode. The toggle switch  button can be used to switch between the automatic and manual reconciliation modes.

Automatic Mode

Step 1: Access Automatic Bank Account Recon Screen

1. Open the **Financial** folder and select **Reconcile**. The screen opens with balance and statement balance information if **All Open Bank Account Details** has been selected for the field next to Debits (highlighted in Figure 24.5 below).

The **Bank Account** field displays a bank account number if only one bank has been defined. Select a bank account if multiple banks have been defined for your court agency.

The **Beginning Balance** field shows that last reconciliation amount along with the **Last Reconciled** date.

The **All Open Bank Account Details** option is selected, which must be selected after opening this screen. By default this field is set to **Matches with Reconciliation File** until the reconciliation file is actually imported.

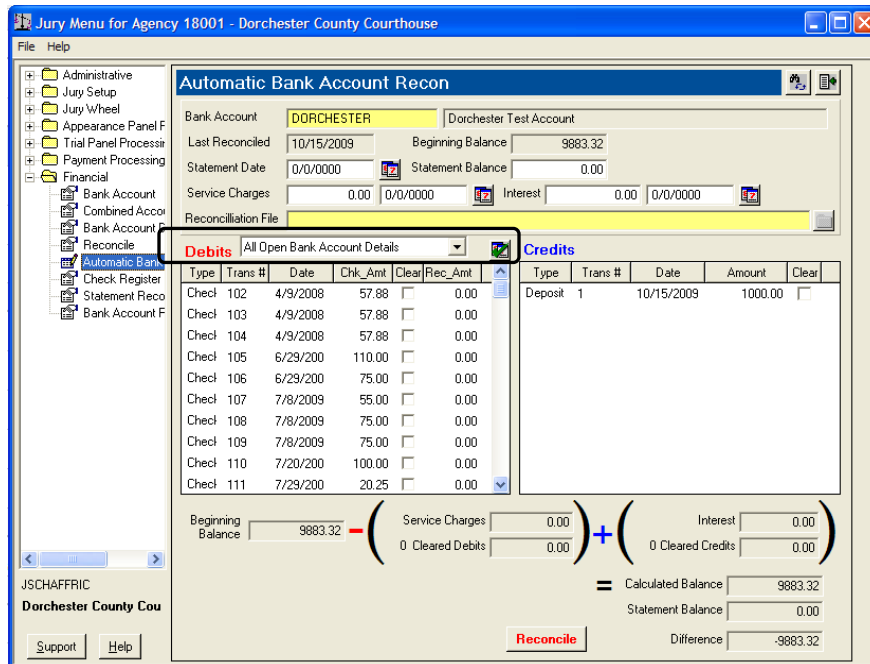


Figure 24.5: Automatic Bank Account Recon Screen

Note Checks that have not been cleared in JMS are listed in the Debits grid. Deposited amounts display in the Credits grid.

2. Enter the **Statement Date** and **Statement Balance**. This is the ending balance on the bank account statement that the bank provided.



3. Enter the total amount of any service charges on the statement into the **Service Charges** and include the date the charges were applied to the account.
4. If any interest was earned, that amount would be entered in the **Interest** field along with the date that the interest was credited to the account.

As each of the items is entered, the bottom portion of the screen is updated with the entered information, as shown in Figure 24.6 below.

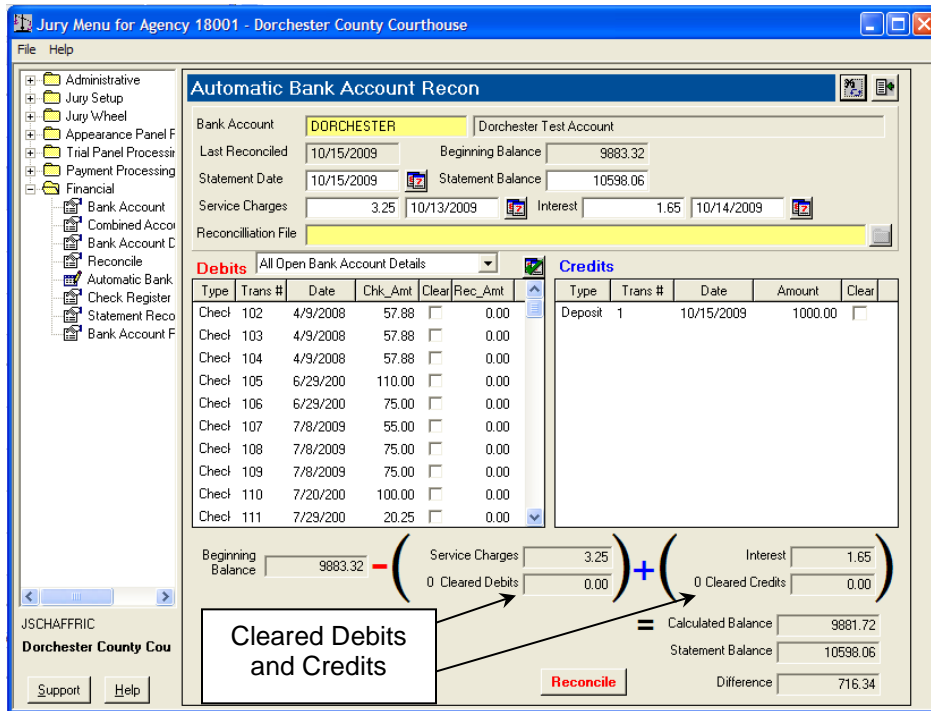


Figure 24.6: Automatic Bank Account Recon Screen with Populated Fields

The bottom portion of the screen displays the current reconciliation status by displaying each of the components in the basic bank account reconciliation formula and their current values.

As you can see in Figure 24.6 above, all elements of the reconciliation formula have been populated with the exception of **Cleared Debits** and **Cleared Credits**. The reason for this is that reconciling actually account transactions hasn't begun.

The **Difference** amount of \$716.34 displayed at this point represents the total net amount of Bank Account debits and credits which must be marked as cleared to balance the account with the provided statement.

Step 2: Import Bank Statement File

This step involves importing the bank provided text file containing checks that have cleared the bank.

1. Double click the **Reconciliation File** field, and a location prompt opens.

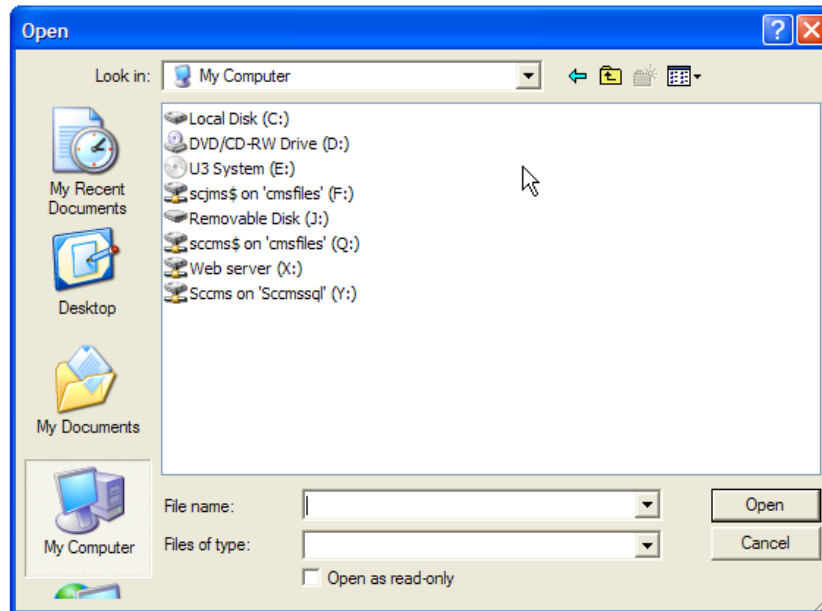


Figure 24.7: File Location Prompt

2. Double-click on any available drives/folders to drill down, locate, and select the desired file by highlighting.

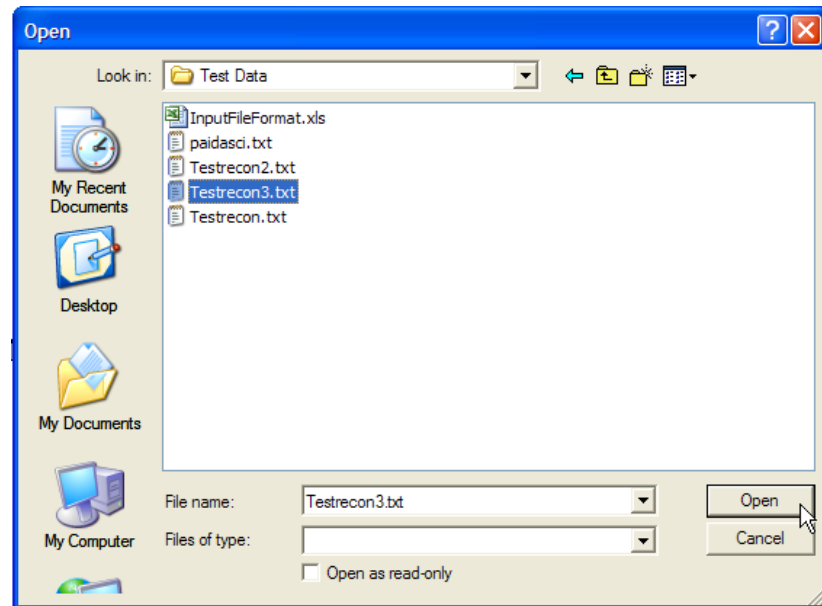


Figure 24.8: File Location Prompt

3. Click the **Open** button to return the selected file name and location to the reconciliation function. The import process automatically initiates. Once all data has been imported, a completion message displays, and the Automatic Reconciliation screen re-opens.

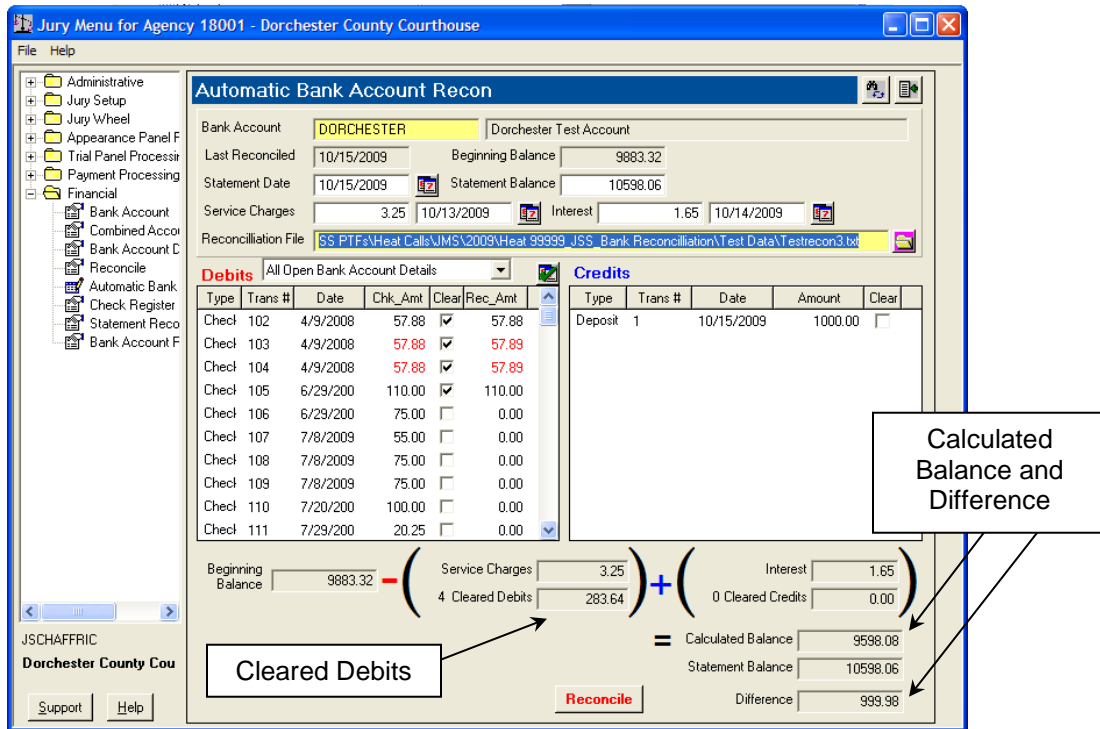


Figure 24.9: Automatic Bank Account Recon Screen

Step 3. Reconcile with Imported Bank Statement

In this simple example, the bank provided text file only contains 4 check numbers that match Bank Account transactions. These 4 checks (marked as Cleared) now appear in the left grid. The other open bank account transactions are not marked as cleared since they were not matched with the data provided by the bank.

The **Cleared Debits** portion of the reconciliation formula has been updated with the number of checks cleared and the total amount.

The **Calculated Balance** and reconciliation **Difference** have been updated to reflect the cleared transactions. Note there is a dropdown box available at the top of the **Debits** grid that controls which transactions are displayed:

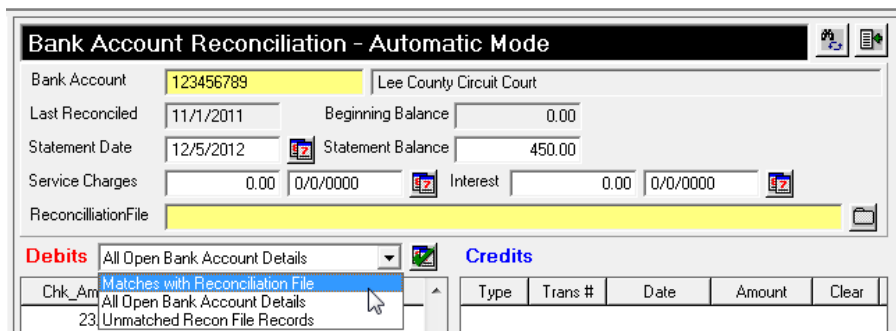


Figure 24.10: Debit Transactions

- All Open Bank Account Details (Default Option)
- Matches with Reconciliation File
- Unmatched Recon File records



The **Unmatched Recon File Records** option would be used if the check numbers that are provided in the bank file do not exist in the JMS system. If there is a **Difference** in the reconciliation display after file import and after manual entries (Service Charges, Interest, Statement Balance) have been made, the cause may be unmatched reconciliation file transactions. If this is the case you can select this option to view these unmatched transactions for further research.

The text file provided by the bank only contains cleared checks, not deposits. Deposits are reconciled by matching deposit amounts and dates on the provided bank statement with corresponding Credits displayed in the grid on the right side of the screen.

Manually check the **Clear** column for these matching items. In the example above, a \$1000.00 deposit appeared on the statement so the corresponding item is marked as clear by clicking twice in the **Clear** check box.

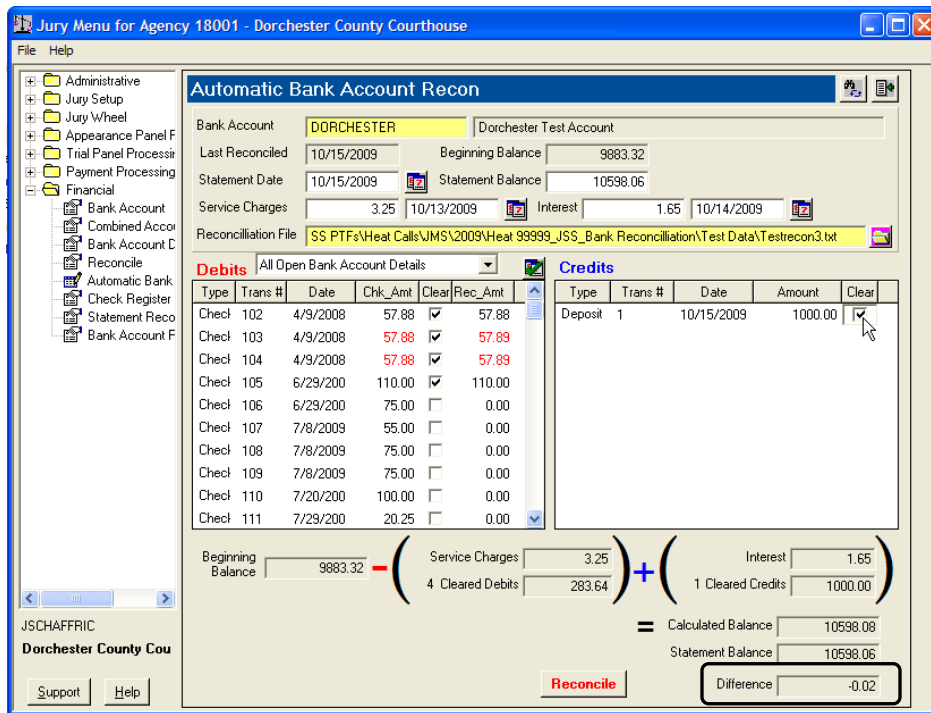


Figure 24.11: Updated Automatic Bank Account Recon Screen

As shown in Figure 24.11 above, the difference between our reconciled balance (**Calculated Balance**) and the **Statement Balance (Ending Balance** from the bank account statement is now two cents.

Normally, after clearing all matching items provided by the bank account, deposits, and entering additional transactions (Service Charges and Interest), the difference would be zero. But in rare instances it is possible that a check may be processed by the bank with a different amount.

The amount difference could be due to an error by the JMS user. For example, this could occur if a manual check is written, but when the check is entered into the JMS system, it is entered with a different amount.



A difference may also be due to a bank error if an incorrect amount for a check is input on their end. In either scenario, these amount discrepancies will be highlighted in the grid as seen in Figure 24.11 above.

Since the check number is a match with the provided bank file, the items are still marked as clear, but the discrepancy in the amount is highlighted in red text. In the above example, it is easy to see that the two cents balancing difference is the result of two checks with amounts that differ between the bank records and JMS records. If it's determined that the error is on the banks end, then measures will have to be taken to correct the error with the bank.

Step 4. Finalize the Reconciliation

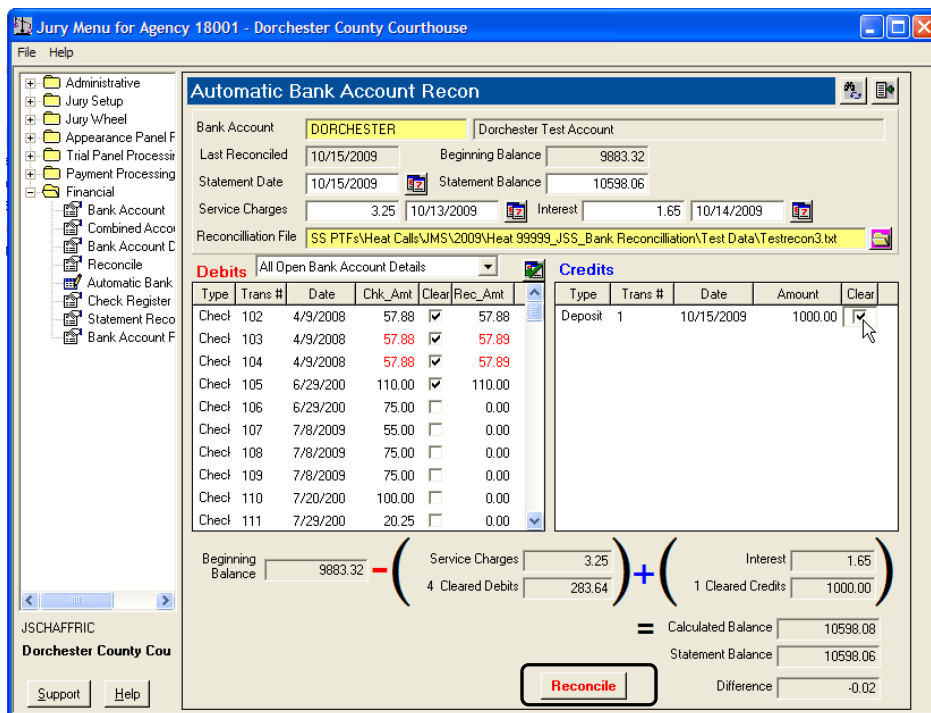


Figure 24.12: Updated Automatic Bank Account Recon Screen

1. Click the **Reconcile** button, and if a **Difference** exists between the **Calculated Balance** and **Statement Balance**, the following message displays.

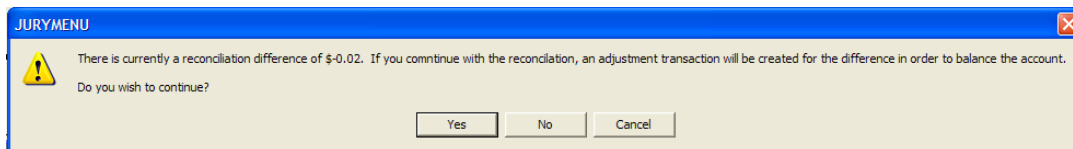


Figure 24.13: Message Prompt for Different Balances

2. Click **Yes** to continue, and another message prompt opens regarding generating the accompanying Reconciliation Report.

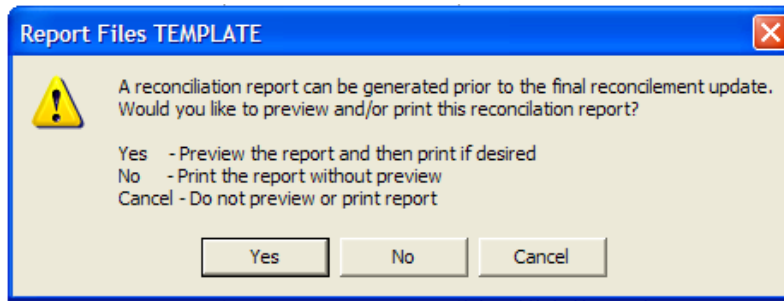


Figure 24.14: Message Prompt

- 3. Click **Yes**, the report previews on your computer screen where you can review the report and then print. **No**, and the report is automatically sent to the printer without preview. **Cancel** abandons the printing process. No report is generated or printed.

Dorchester County Courthouse
Bank Account Reconciliation Listing

Sorted by: Transaction Type and Date Cleared

Check #	Cleared Date	Amount
Debit Adjustments:		
	11/03/2009	\$1.82
Total Debit Adjustments:	1	\$1.82
Bank Charges:		
	10/30/2009	\$3.29
Total Bank Charges:	1	\$3.29
Check:		
128	10/27/2009	\$21.00
129	10/27/2009	\$34.00
130	10/29/2009	\$22.00
131	10/29/2009	\$24.00
132	10/29/2009	\$28.00
133	10/29/2009	\$36.00
134	10/29/2009	\$24.00
135	10/29/2009	\$10.00
136	10/29/2009	\$10.00
Total Checks:	9	\$209.00
Interest:		
	10/31/2009	\$2.11
Total Interest:	1	\$2.11

RECONCILIATION SUMMARY

Beginning Balance	\$15,203.00	-	(Service Charges: \$3.29 Cleared Debits: \$209.00)	+	(Interest: \$2.11 Cleared Credits: \$0.00)	=	Calc. Balance: \$14,992.82
							Statement Balance: \$14,991.00
							Difference (Adj): \$-1.82

Figure 24.15: Example of a Reconciliation Report (Does not reflect data from screen shots shown above.)

Note The report shown was generated from a different reconciliation process, so the information displayed does not match the data displayed on previous screen shots. It does show however how the report lists all reconciliation related transactions (ordered and subtotaled by transaction type) followed by a final Reconciliation Summary which should match the same summary provided at the bottom of the reconciliation screen.

After the report is previewed or sent to the printer, the following prompt opens:

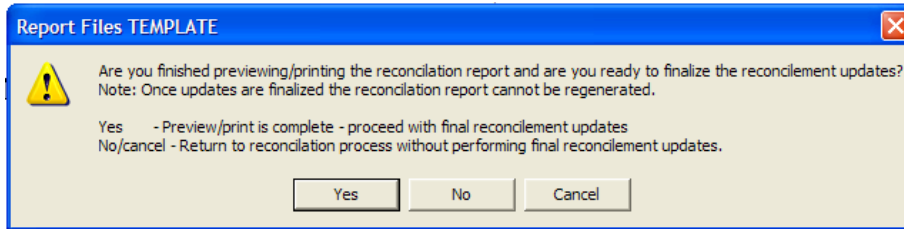


Figure 24.16: Message Prompt After Report Generation, Preview, Print

4. Click **Yes** to continue. If you choose not to continue, you are returned to the reconciliation screen with all entries and changes intact allowing you to make additional changes if desired.

After completing the final reconciliation, the process will update each transaction marked as **Clear** in the grids to a cleared status in the Bank Account Details file. In addition, cleared transactions are created for the service charges, interest payment and balancing adjustment (if applicable).

Once the process is complete, the Automatic Bank Account Reconciliation screen is redisplayed with the updated bank account information and transactions. The items just reconciled are no longer visible in the grids and the **Last Reconciled** date and **Beginning Balance** have been updated.

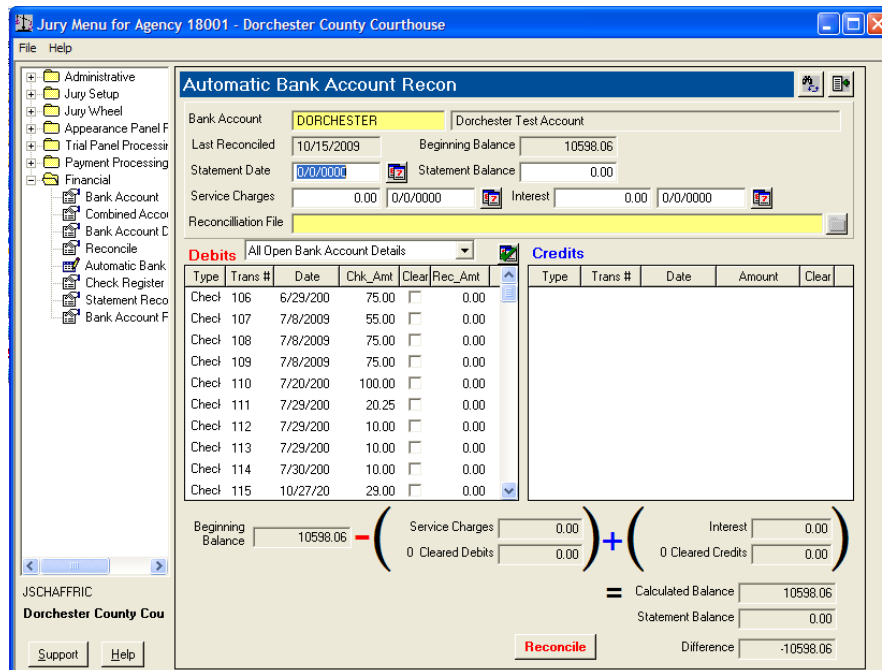


Figure 24.17: Automatic Bank Account Recon Screen After Generating a Reconciliation Report

The account is now reconciled and ready until the next account statement/file is received.



Manual Mode

In manual mode, the bank provides only an account statement, not text file of cleared items.

When in manual reconciliation mode, the **Reconciliation File** field becomes inactive (gray and protected). This represents the primary difference with manual reconciliation in that all checks must be cleared manually rather than being matched and cleared automatically based on the input bank file data.

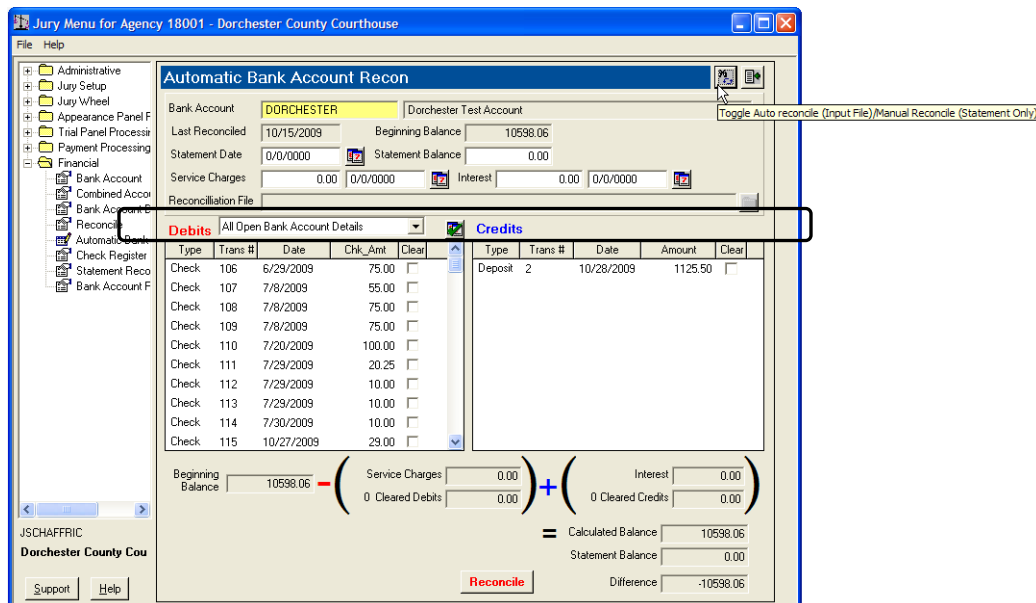


Figure 24.18: Manual Mode Switch

1. Click the reconciliation mode toggle  button to switch to manual mode

The **Bank Account** field displays a bank # account number if only one bank has been defined. Select a bank account if multiple banks have been defined for your court agency.

The **Beginning Balance** field shows that last reconciliation amount along with the **Last Reconciled** date.

The **All Open Bank Account Details** option is selected, which must be selected after opening this screen. By default this field is set to **Matches with Reconciliation File** until the reconciliation file is actually imported.

2. Enter the **Statement Date** and **Statement Balance**. This is the ending balance on the bank account statement that the bank provided.
3. Enter the total amount of any service charges on the statement into the **Service Charges** and include the date the charges were applied to the account.
4. If any interest was earned, that amount would be entered in the **Interest** field along with the date that the interest was credited to the account.
5. Double-click in the **Clear** checkbox to clear individual transactions (Debit & Credits) in the grid.



You can also highlight groups of transactions using SHIFT-click or CTRL-click.

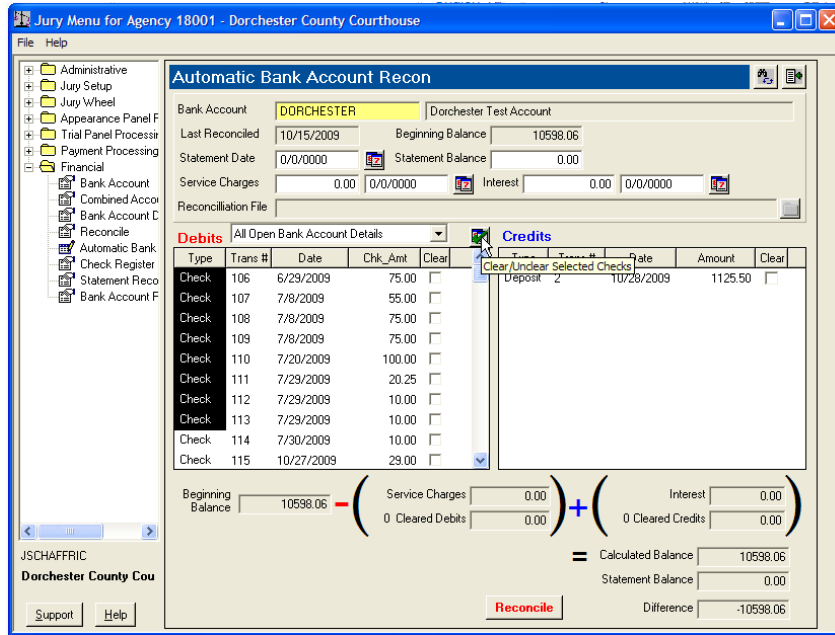



Figure 24.19: Clear Checks Manually

6. Click the **Clear/Unclear Selected Checks**  button to clear the highlighted checks. In Figure 24.19, the highlighted checks 106 – 113 are cleared as shown in Figure 24.20.

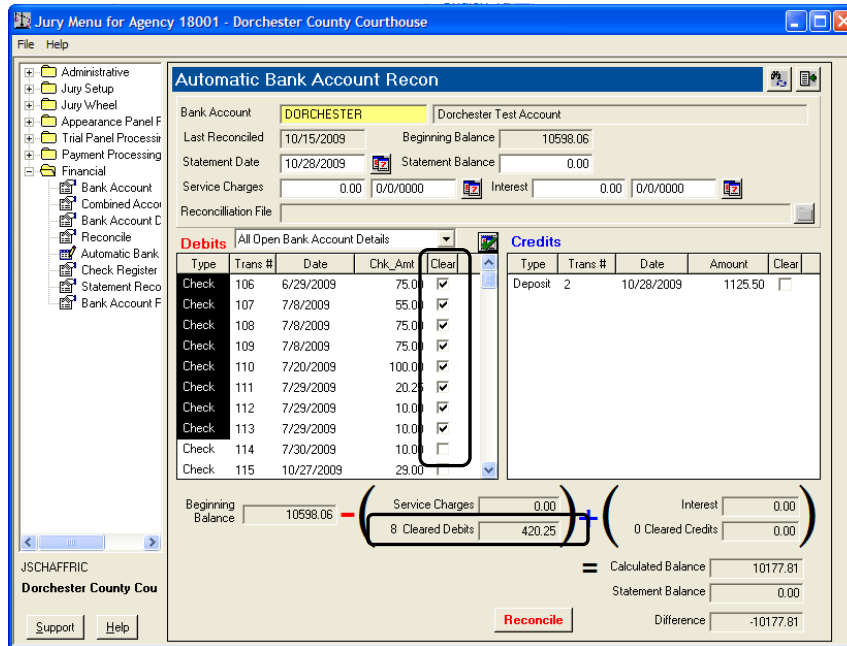



Figure 24.20: Cleared Checks with Updated Balancing Data

The selected items are now marked as clear and the balancing formula at the bottom of the screen has been updated to reflect the change.

The same procedure can be used to unclear a group of transactions as well.



Use the **Clear/Unclear Selected Checks**  button to toggle selected transactions to the opposite of their current state. So if a highlighted transaction is currently marked as cleared then it will change to un-cleared and vice versa.

7. Verify that all Debits and Credits have been marked as cleared.
8. Click the **Reconcile** button, which updates the system.

The same report and option prompts and option provided for automatic reconciliation are also provided for manual reconciliation. (See the *Automatic Mode* section, above, for more information.)



Lesson 25: Print a Check Register Report

Print the Check Register report to list checks printed for jurors. This report assists in the bank reconciliation process.

Lesson Objectives

- ❖ Print a Check Register Report to use in the bank reconciliation process.

These instructions are for a typical Check Register Report to use in the bank reconciliation process.

1. Open the Financial folder and select Check Register Report.

Check Register Report

Restricted by

Select date range

Which period to report? User Defined Begin Date 6/1/2008

Length of report period User Defined End Date 6/30/2008

Starting Check # 0

Ending Check # 0


Check Status *Blank

Sorted By

Check Nbr

Payee Name

Figure 25.1: Check Register Report Screen

2. Keep the User Defined entries in the Which period to report? and the Length of Report period fields.
3. Enter the **Begin Date** and **End Date** for the reporting period.
4. Keep the default entries in the **Starting Check #**, **Ending Check #**, and **Check Status** fields.
5. (Optional) Click to select a **Sort By** setting to print the report by check number or payee name.
6. Click the **Print**  button.



Dorchester County Courthouse
CHECK REGISTER REPORT

Filtered by: Transaction Date From: 6/1/2008 Thru 6/30/2008 **Sorted by:** Check Nbr.

CHECK					
NUMBER	DATE	AMOUNT	STATUS	PAYEE NAME	
12234	6/11/2008	\$20.00	Outstanding	Blackwood, Valerie H	
12235	6/11/2008	\$20.00	Outstanding	Clarkson, Jackie G	
12236	6/11/2008	\$20.00	Voided	Delis, Lindsey M	
12237	6/11/2008	\$20.00	Cleared	Griffin, Sarah E	
12238	6/11/2008	\$20.00	Cleared	Hare, Michaelene K	
12239	6/11/2008	\$20.00	Cleared	Hartnagle, William D	
12240	6/11/2008	\$20.00	Outstanding	Martino, Ricky T	
12241	6/11/2008	\$20.00	Cleared	Smoak, Ann M	
12242	6/11/2008	\$20.00	Outstanding	Sweat, Laura M	
12243	6/11/2008	\$20.00	Cleared	Wood, Randall S	
12244	6/11/2008	\$20.00	Outstanding	Delis, Lindsey M	
REPORT TOTAL		\$220.00	NUMBER PRINTED: 11		

Figure 25.2: Printed Check Register Report



Lesson 26: Generate a Statement Reconcile Report and Bank Account Register

Generate these reports as part of the bank reconciliation process.

Lesson Objectives

- ❖ Print a Statement Reconcile Report.
- ❖ Print a Bank Account Register Report.

Step 1. Generate the Statement Reconcile Report

1. Open the Financial folder and select **Statement Reconcile RPT**.

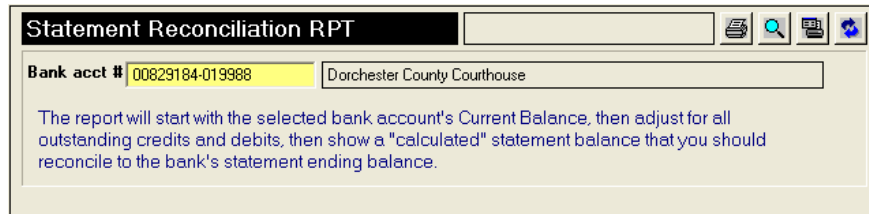



Figure 26.1: Statement Reconciliation RPT Screen

2. If necessary, enter or change the **Bank acct #** field.
3. Click the **Print**  button.

Dorchester County Courthouse						
Statement Reconciliation Report						
This report displays details for Statement reconciliation for a given account						
Filtered by: Acct #: 00829184-019988 Bank of South Carolina			Sorted by: Trans Date			
TRANSACTION	DATE	DESCRIPTION	AMOUNT	STATUS		
Current System Balance in JEMS			\$5,000.00			
12234	6/11/2008	C Check	\$20.00	Outstanding		
12235	6/11/2008	C Check	\$20.00	Outstanding		
12240	6/11/2008	C Check	\$20.00	Outstanding		
12242	6/11/2008	C Check	\$20.00	Outstanding		
12244	6/11/2008	C Check	\$20.00	Outstanding		
Plus Outstanding Debits			\$100.00			
Current statement balance			<u>\$5,100.00</u>			

Figure 26.2: Printed Statement Reconciliation Report



Step 2. Print the Bank Account Register Report

1. Select Bank Account Register from the Financial folder.

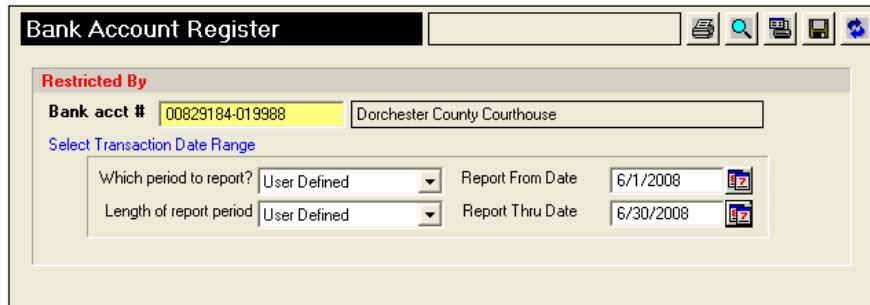



Figure 26.3: Bank Account Register Screen

2. Keep the User Defined entries in the Which period to report? and the Length of Report period fields.
3. Enter the **Begin Date** and **End Date** for the reporting period.
4. Click the **Print**  button.


Dorchester County Courthouse						
Bank Account Register Report						
This report displays details on the transactions for a given Bank Account over a period of time						
Filtered by: Acct #: 00829184-019988		Bank of South Carolina		Trans Date From: 06/01/2008 Thru 06/30/2008		Sorted by: Trans Date
TRANSACTION	DATE	DESCRIPTION	CLR DATE	AMOUNT	STATUS	
Debits						
12237	6/11/2008	C Griffin, Sarah E	6/30/2008	20.00	Cleared	
12238	6/11/2008	C Hare, Michaelene K	6/30/2008	20.00	Cleared	
12239	6/11/2008	C Hartnaque, William D	6/30/2008	20.00	Cleared	
12241	6/11/2008	C Smoak, Ann M	6/30/2008	20.00	Cleared	
12243	6/11/2008	C Wood, Randall S	6/30/2008	20.00	Cleared	
				100.00		
12234	6/11/2008	C Blackwood, Valerie H	1/1/1	20.00	Outstanding	
12235	6/11/2008	C Clarkson, Jackie G	1/1/1	20.00	Outstanding	
12240	6/11/2008	C Martino, Ricky T	1/1/1	20.00	Outstanding	
12242	6/11/2008	C Sweat, Laura M	1/1/1	20.00	Outstanding	
12244	6/11/2008	C Delis, Lindsey M	1/1/1	20.00	Outstanding	
				100.00		
12236	6/11/2008	C Delis, Lindsey M	6/11/2008	20.00	Voided	
				20.00		

Figure 26.4: Printed Bank Account Register Report



Lesson 27: Close Appearance Panels and Trial Panels

When trials and court sessions are complete, you can close Trial Panels and Appearance Panels. These panels remain in the system as historical records and cannot be edited.

You can access these closed panels by accessing the panel wide screen (Appearance Panel Wide or Trial Panel Wide) and use the **Toggle**  button to display non-finalized, finalized or all panels.

Lesson Objectives

- ❖ Close an Appearance Panel.
- ❖ Close a Trial Panel.

Part I. Finalize an Appearance Panel

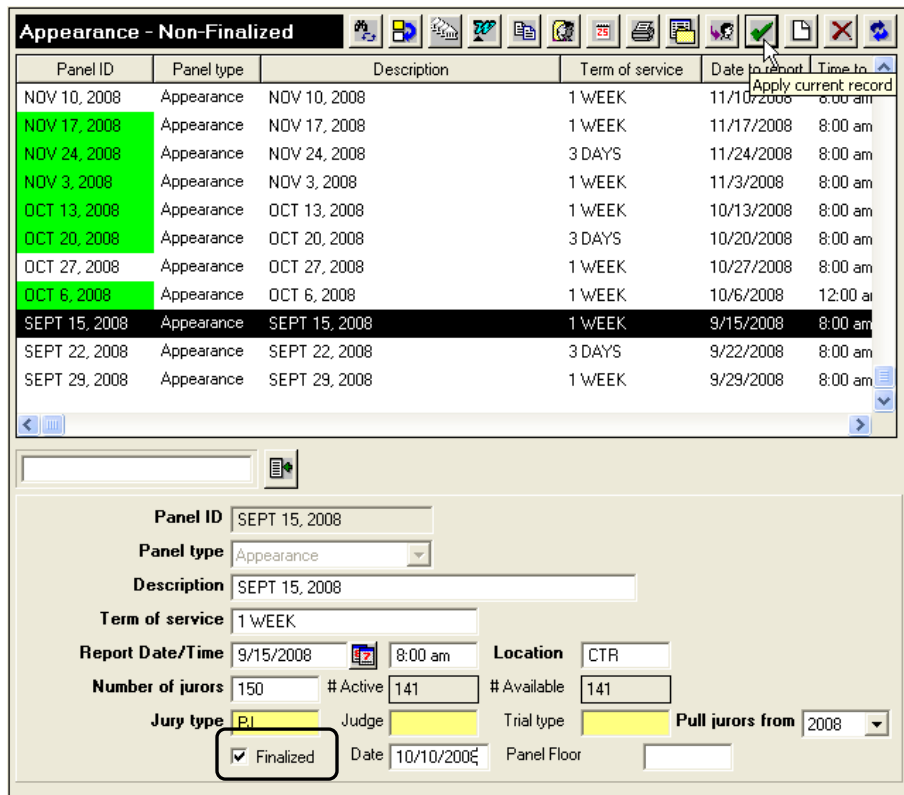



Figure 27.1: Finalize an Appearance Panel

1. Click to open the Appearance Panel Processing folder on the Menu Tree.
2. Select **Appearance Panel Wide** and highlight the panel to finalize.
3. Click to check the **Finalized** checkbox.
4. Click  to save.



Part II. Finalize a Trial Panel

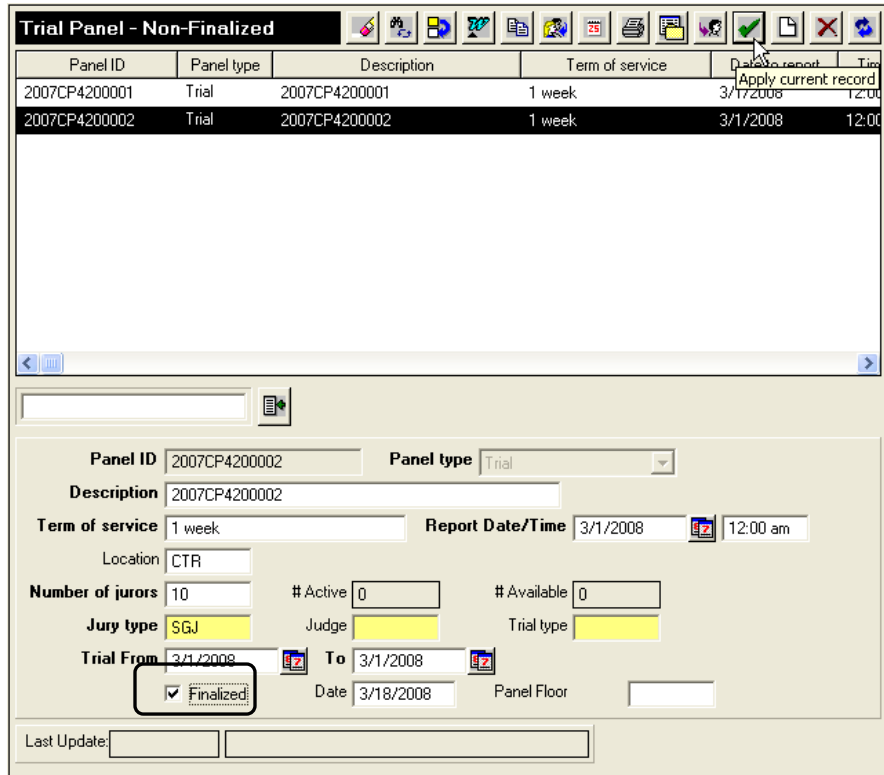



Figure 27.2: Finalize a Trial Panel

1. Click to open the **Trial Panel Processing** folder on the **Menu Tree**.
2. Access the **Trial Panel Wide** and highlight the panel to finalize.
3. Click to check the **Finalized** checkbox.
4. Click  to save.



Lesson 28: Reconcile with Combined Bank Accounts and Court Agencies

The Combined Bank Accounts feature can be set up for counties that manage multiple court agencies from one office.

Step 1. Add a Record that Combines Bank Accounts

1. Click to open the **Financial** folder on the **Menu Tree**.
2. Select Combined Accounts Definition.

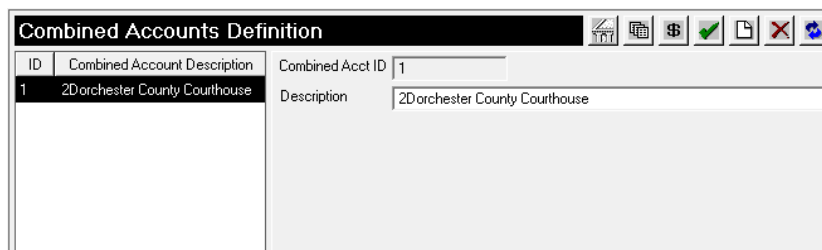




Figure 28.1: Combined Accounts Definition Screen

3. Click the **New**  button to create a record used to combine bank accounts and court agencies.
4. Enter a description for the combined account. The **Acct ID** is automatically assigned.
5. Save , and the Select Court Agencies window opens.

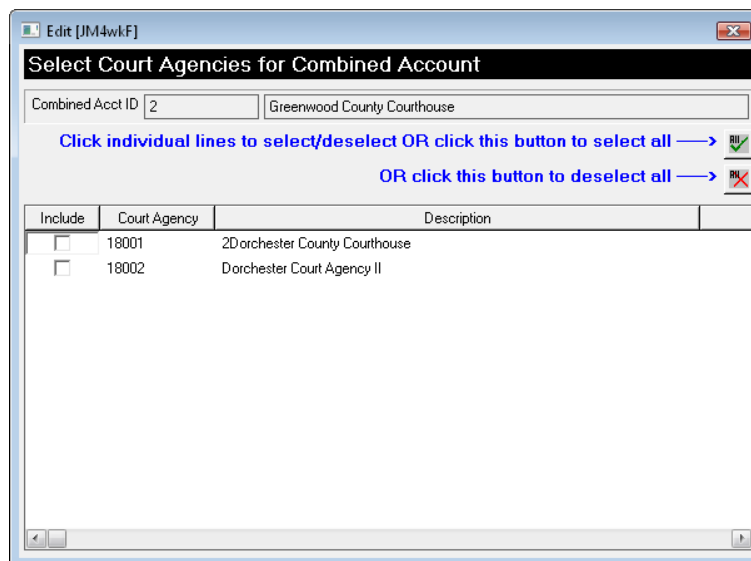



Figure 28.2: Select Court Agencies Screen

6. Click the **Include** checkbox to select court agencies.
7. Close  the window, and the Select Bank Accounts window opens.

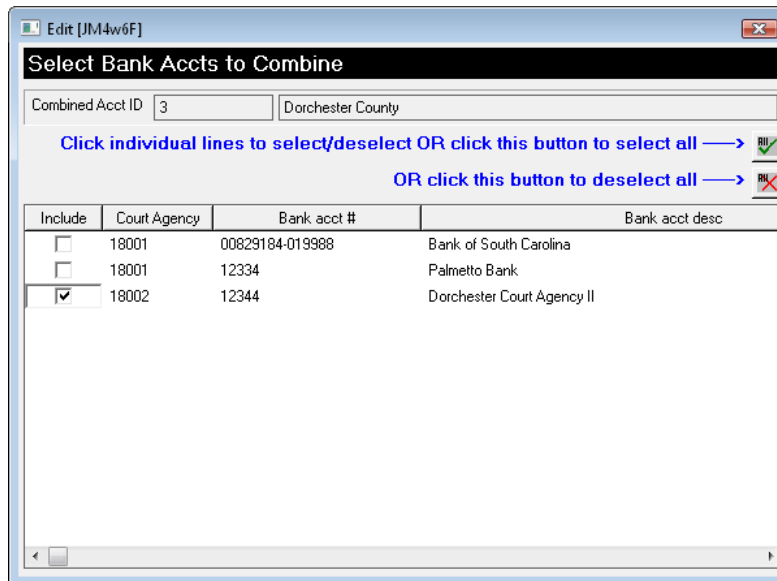



Figure 28.3: Select Bank Accts to Combine Screen

8. Click the **Include** checkbox to select bank accounts.
9. Close  the window, and the Combined Accounts Definition screen re-opens with additional icon buttons available.

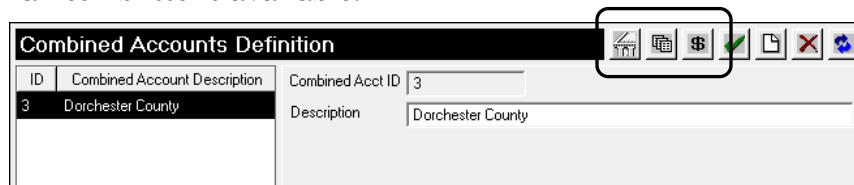





Figure 28.4: Combined Accounts Definition Screen

Note You can delete, edit, or add Combined Account records as these records have no effect on JMS data.

Once a combined account is defined, you can:

-  Open the Select Court Agencies window and edit the court agencies included in this combined account.
-  Open the Select Bank Accounts window and edit the bank accounts included in this combined account.
-  Open the Display Combined Account Balances window where you can review balances for the combined accounts, clear checks, and view a list of cleared and uncleared checks.



Step 2. Reconcile Checks for a Combined Account

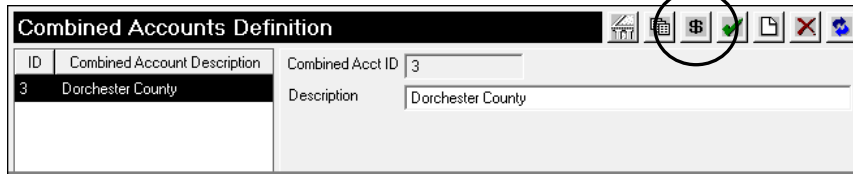



Figure 28.5: Combined Accounts Definition Screen

1. Highlight to select the combined account to balance.
2. Click the **Combined Account Balances**  button, and the Display Combined Acct Balances window opens.

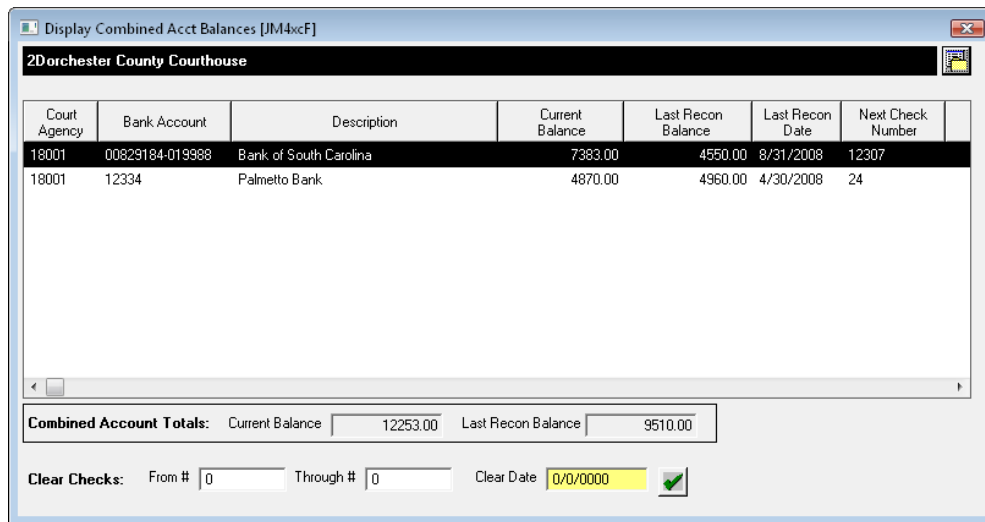



Figure 28.6: Display Combined Acct Balances Window

3. Enter the checks to clear and the date. Enter single checks (same check number in both **From #** and **Through #** fields or enter a range of check numbers).
4. Save  the information.

Step 3. View Bank Account Details

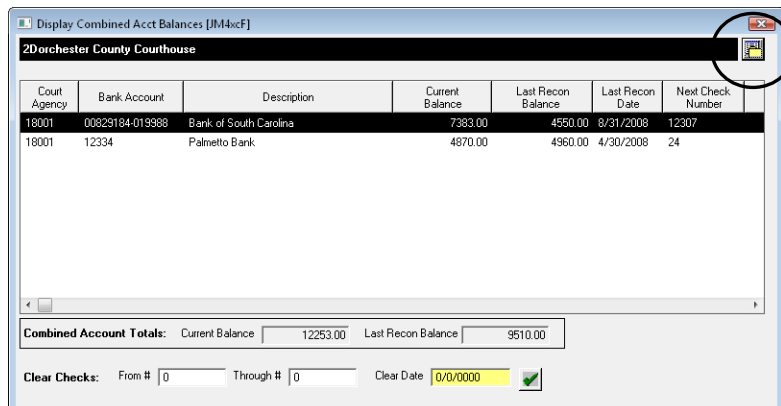



Figure 28.7: Display Combined Acct Balances Window



1. From the Display Combined Acct Balances window, click the **Bank Account Details**  button.
2. Highlight a check to review the details in the data area of the screen.

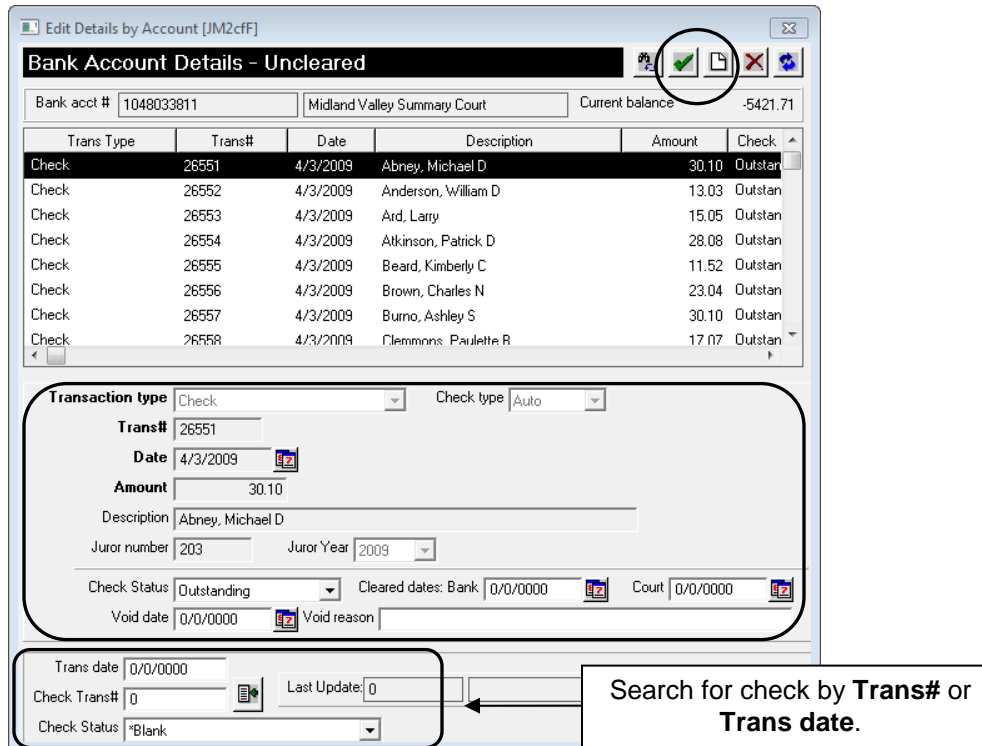



Figure 28.8: Account Detail Screen

Use this screen to add deposits and make adjustments. You can also search for a check by check trans # or trans date.

Note

Use the Toggle  button to switch between all checks, only cleared checks, and only uncleared checks.

Use [Ctrl+click] to highlight individual check records and [Shift+click] to highlight a range of check records.



Section 4:

Grand Jury and State Grand Jury Processing

Lesson 28: Create and Manage a Grand Jury Panel 111

Lesson 29: Create a State Grand Jury Wheel 113



Notes



Lesson 29: Create and Manage a Grand Jury Panel

Each year create two new appearance panels:

1. GJ Venire 2014

- a. Create the panel for the appropriate amount of jurors (i.e., 150) and then pull the jurors into the panel.
- b. Give the jurors a sequence number and then print out the summons.
- c. You can excuse, mark present and pay the jurors for that first appearance under this appearance panel.

2. Grand Jury 2014

Create the panel - this panel will be your 'working panel' throughout the year once the 6 holdover jurors are transferred in and the new 12-15 jurors are selected. (you will not create a Trial Panel – you will do all your work from the Appearance Panel)

After the Grand Jury has met for the final time for the 2013 calendar year:

If you currently have your Grand Jurors in a Trial Panel:

1. Return all the jurors to their original Appearance Panel. 'Mark present' ONLY the 15 Grand Jurors who have already served ONE year.
2. Run a 'Random Strike Sheet'. Use the first 6 jurors on this sheet as the holdover jurors for 2014.
3. Transfer these 6 holdovers to the Grand Jury 2014 Appearance Panel and assign sequence numbers. This will keep your experienced grand jurors at the top.

From the 1st Grand Jury term for the new calendar year – (GJ Venire 2014) - After the Judge has qualified the jury

1. Run a Random Strike Sheet from Appearance Panel "GJ Venire 2014". The first 12 to 15 jurors (depending on alternates) will be your new grand jurors for 2014.
2. Transfer the new 12 grand jurors into the 'Grand Jury 2014' Appearance Panel.
3. Reassign sequence numbers.
4. Transfer each alternate in the order they were drawn, one at a time, to the new 'Grand Jury 2014' Appearance Panel.

Resequence after each move.



This is your complete Grand Jury 2014 Appearance Panel to use for the rest of the year. The experienced six who are serving for the second time are at the top, numbers 1-6. The next 12 names are the new Grand Jurors and the last 3 names are the new alternates.

After the jurors have been paid you can finalize the Grand Jury 2013 Appearance Panel and the GJ Venire 2013 Appearance Panel.

Repeat these procedures each year.



Lesson 30: Create a State Grand Jury Wheel

This section explains how to pull a State Grand Jury wheel. For non-hosted counties, instructions include the process for emailing the State Grand Jury Wheel to the South Carolina Judicial Department's IT department for the final preparations.

Hosted Counties: Perform Steps 1 – 3 only

Non-hosted Counties: Perform Steps 1 – 4

Step 1. Access Appearance Panel Wide

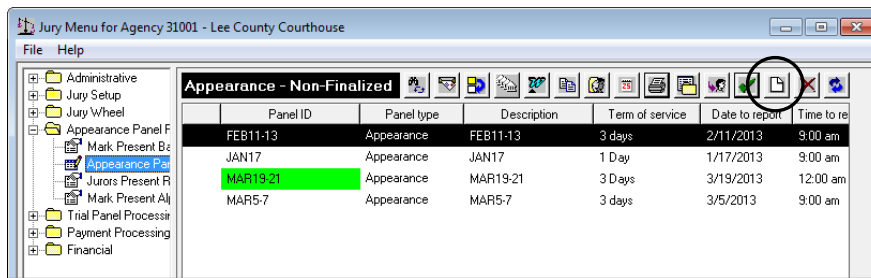


Figure 30.1: Appearance Panel Wide

1. Click the **Appearance Panel Processing** folder in the **Menu Tree**.
2. Select **Appearance Panel Wide**.

Step 2. Create the State Grand Jury Appearance Panel

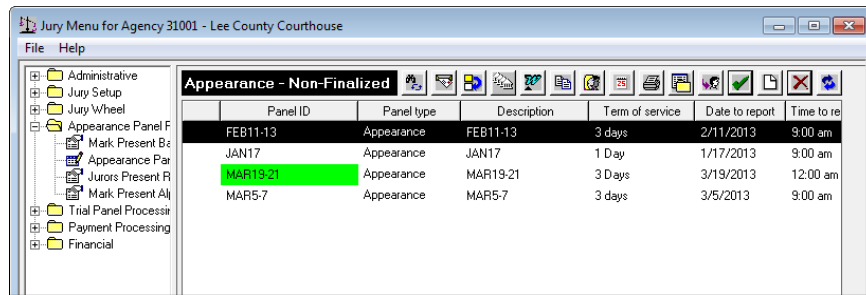



Figure 30.2: New Appearance Panel

1. Click the **New**  button.
2. Enter a **Panel ID** for the State Grand Jury. Note that the **Description** mimics the data typed into the **Panel ID** field. You can change the description if necessary before saving the panel.
3. Enter 1 YEAR as the **Term of service**.
4. Enter the time and date for the jurors to report to the court. This time and date is used on the summons sent to the jurors.
5. Enter the court **Location**.
6. Enter the **Number of jurors** needed for this juror pool.
7. Double-click in the **Jury type** field to open a Select window that lists all the jury types available for your court.

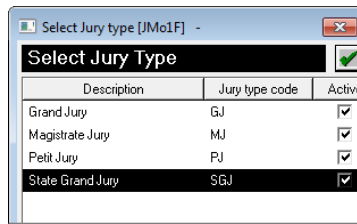




Figure 30.3: Select Jury Type Window

8. Highlight the **State Grand Jury** type, and click the **Select**  button.
9. Click the **Save**  button, and the STG displays on the grid of the **Appearance Panel Wide** screen.

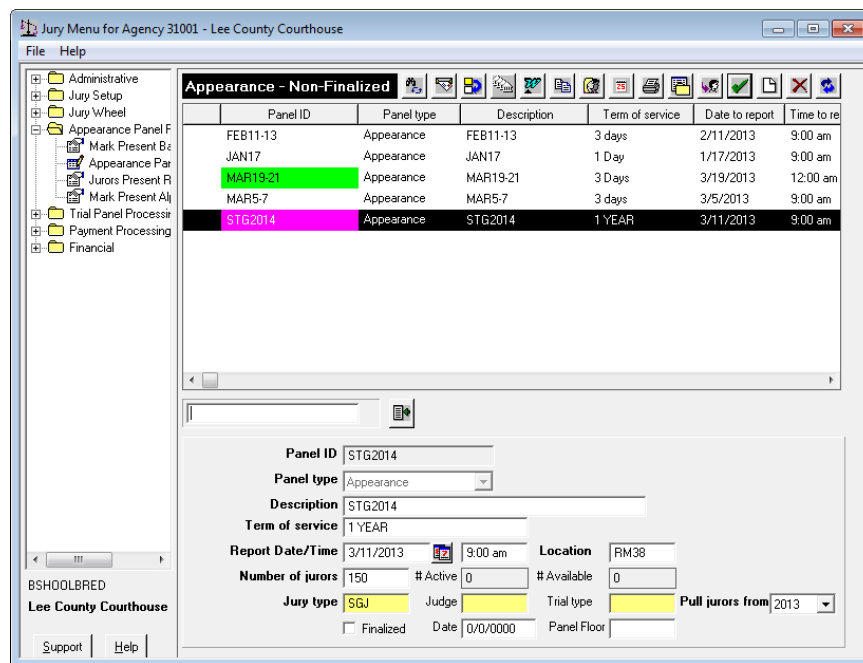


Figure 30.4: New Appearance Panel

Step 3. Pull Jurors


Click the **Pull Jurors from Juror Master**  button.



Figure 30.5: Random Select Jurors Window



Click the **OK** button on the message prompt when the process is complete.



Figure 30.6: Juror Selection Validation Message Prompt

Step 4. Non-Hosted Counties ONLY: Complete the Process and Email the Jury Wheel

1. From the Appearance Panel, click the **Print Reports**  button to open the Reports Prompt screen.

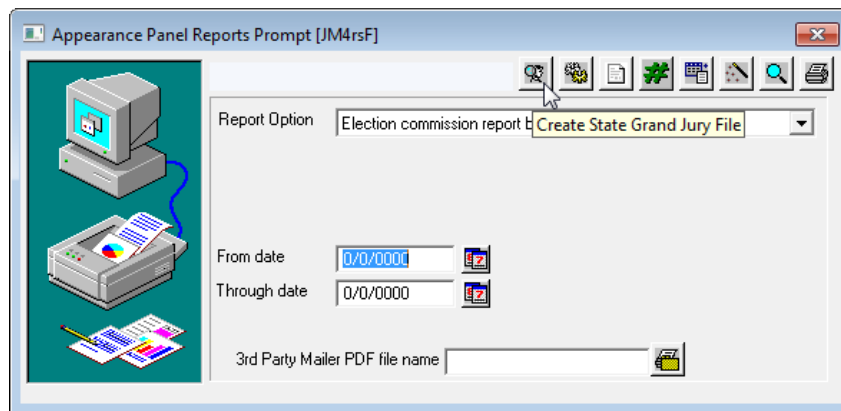


Figure 30.7: Appearance Panel Reports Prompt Window

2. Click the **Create State Grand Jury File**  button, and the State Grand Jury Wheel window opens.

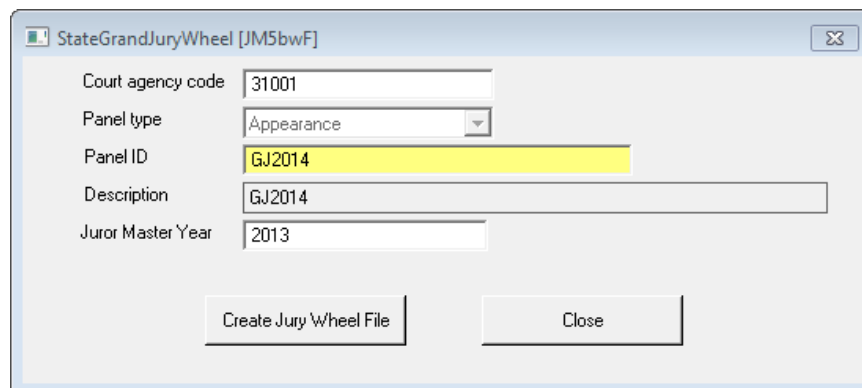


Figure 30.8: State Grand Jury Wheel Window

3. Click the **Create Jury Wheel File** button. This process creates a comma-delimited file that is emailed to the South Carolina Judicial Department's IT department for further processing.



Figure 30.9: Validation Message Prompt

4. Click the **OK** button, and the email file opens. The **To:** and **From:** fields are populated and the Jury Wheel file is automatically attached.

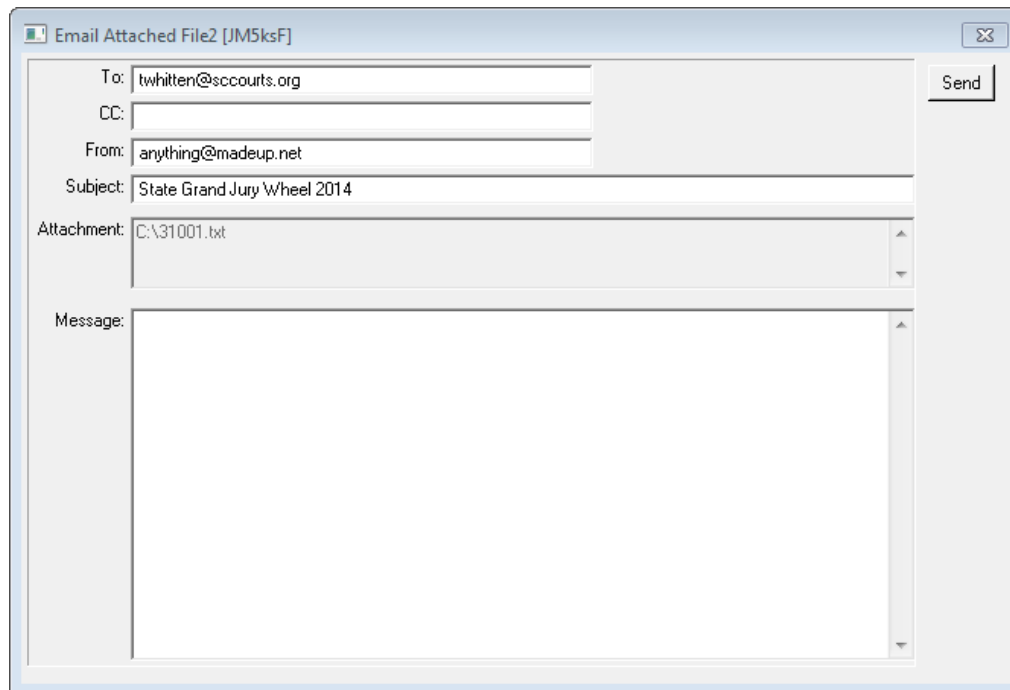


Figure 30.10: Email for State Grand Jury Wheel

5. Enter a **Subject:** line, and then click the **Send** button.

South Carolina Judicial Department
Information Technology
1015 Sumter Street
Columbia, South Carolina 29201