South Carolina Judicial Department



Court Case Management

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Table of Contents

Section 1: Pre-Court Date Procedures	1
Lesson 1: Create an Appearance Panel	3
Lesson 2: Pull a Jury, Assign Sequence Numbers, and Print a Summons	7
Lesson 3: Re-print a Summons for a Juror	19
Lesson 4: Print Reports	21
Lesson 5: Enter Juror's Biographical Information	25
Lesson 6: Transfer Jurors to Another Appearance Panel	29
Lesson 7: Excuse a Juror	33
Lesson 8: Manually Add Jurors and Assign to Appearance Panel	35
Lesson 9: Print Reports for Marking Jurors Present	37
Lesson 10: Process a Magistrate Paper Strike	39
Lesson 11: Generate a Rap Sheet for the Solicitor's Office	41
Section 2: Court Day Procedures	43
Lesson 12: Marking Jurors Present in JMS	45
Lesson 13: Juror Excused by Judge	51
Lesson 14: Protect a Juror	53
Lesson 15: Create Trial Panels	55
Lesson 16: Pull Jurors for a Trial	57
Lesson 17: Return Jurors to the Appearance Panel	61
Lesson 18: Retrieve Jurors Returned to the Appearance Panel	65
Lesson 19: Print or Re-shuffle a Random Strike Sheet	69
Section 3: Payment Processing and Financials	73
	75
Lesson 20: Enter Juror Mileage	
Lesson 20: Enter Juror Mileage Lesson 21: Print Payment Vouchers for Jurors	
	77
Lesson 21: Print Payment Vouchers for Jurors	77 79
Lesson 21: Print Payment Vouchers for Jurors Lesson 22: Print Checks	77 79 83
Lesson 21: Print Payment Vouchers for Jurors Lesson 22: Print Checks Lesson 23: Reprint Checks	77 79 83 85
Lesson 21: Print Payment Vouchers for Jurors Lesson 22: Print Checks Lesson 23: Reprint Checks Lesson 24: Reconcile a Bank Account	77 79 83 85 99
Lesson 21: Print Payment Vouchers for Jurors Lesson 22: Print Checks Lesson 23: Reprint Checks Lesson 24: Reconcile a Bank Account Lesson 25: Print a Check Register Report	77 79 83 85 99 101



Section 4: Grand Jury and State Grand Jury Processing	109
Lesson 29: Create and Manage a Grand Jury Panel	111
Lesson 30: Create a State Grand Jury Wheel	113

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



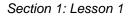
Section 1: Pre-Court Date Procedures

Lesson 1: Create an Appearance Panel	3
Lesson 2: Pull a Jury, Assign Sequence Numbers, and Print a Summons	7
Part I. Pull a Jury without a Password	7
Part II. Pull a Jury with the Juror Commissioner Present	9
Part III. Pull a Jury with Juror Commissioner Remote	11
Part IV. Assign Sequence Numbers and Print Summons	14
Part V. Create a Summons File for Printing by a Third Party	17
Lesson 3: Re-print a Summons for a Juror	19
Lesson 4: Print Reports	21
Formats and Destinations for Exporting Documents	22
Lesson 5: Enter Juror's Biographical Information	25
Lesson 6: Transfer Jurors to Another Appearance Panel	29
Lesson 7: Excuse a Juror	33
Lesson 8: Manually Add Jurors and Assign to Appearance Panel	35
Lesson 9: Print Reports for Marking Jurors Present	37
Lesson 10: Process a Magistrate Paper Strike	39
Lesson 11: Generate a Rap Sheet for the Solicitor's Office	41











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

Appearance -	Non-Finali	zed 🍂 🛃 🖳 🌠 🗈	2 🗉 🖉	10)	
Panel ID	Panel type	Description	Term of service	ate to report	Time to 🔺
DEC 15, 2008	Appearance	DEC 15, 2008	1 WEEK	12/15/2008	8:00 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
<	•				>
(3) De	Panel ID DE anel type App escription DE	bearance			
Report D	of service 20 ate/Time 12/ r of jurors 50 Jury type PJ			5) ull jurors from [2008 💌

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.

Select Jury type [JMo1F] -					
Select Jury Type		\checkmark			
Description	Jury type code	e Antis			
Petit Jury	PJ	J			
State Grand Jury	SGJ	\checkmark			
Figure 1 2: Colo	ot lung Type Min	daw			

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.



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

Appearance - Non-Finalized 🐘 🔂 🔤 🖉 🖻 🙆 🗷 🖉 🕒 🗶 🕿					
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.

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









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.

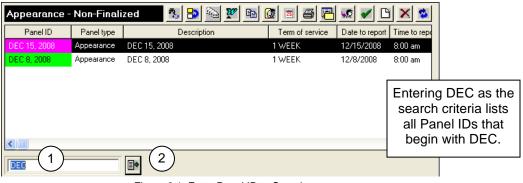


Figure 2.1: Enter Panel ID to Search

- 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

Panel ID	Panel type	Description	Pull Jurors from J		Time to rep
OCT 13, 2008	Appearance	OCT 13, 2008	T WEEK	10/13/2008	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 2.2: Pull Jurors for Highlighted Panel

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

RandomSelect [JMh5F]			
Random Select Jurors		🕅 🗊	
Panel ID SEPT 22, 2008 Description SEPT 22, 2008	Jurors Available 72471		
Juror Master Year Total Jurors Required for this Panel Number of Active Jurors Number of Jurors Needed Number of Jurors to Select	2008 100 2 98 5		
Figure 2.3: Ranc	om Select Jurors Window		

2. Click the **Pull Jurors** Dutton 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.

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.

Note 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

	ed 🛝 🐬 🔂 🖄 🌠 🗎	1 👰 🗉 🎒 🖻	😼 🖌 🕒	X 🔹
Panel type	Description	Dull havens from hu		Time to rep
Appearance	OCT 13, 2008	T WEEK	10/13/2008	8:00 am
Appearance	OCT 6, 2008	1 WEEK	10/6/2008	12:00 am
Appearance	SEPT 15, 2008	1 WEEK	9/15/2008	8:00 am
Appearance	SEPT 22, 2008	3 DAYS	9/15/2008	8:00 am
Appearance	SEPT 29, 2008	1 WEEK	9/29/2008	8:00 am
/	Appearance Appearance Appearance Appearance	Appearance OCT 13, 2008 Appearance OCT 6, 2008 Appearance SEPT 15, 2008 Appearance SEPT 12, 2008	Appearance OCT 13, 2008 TWEEK Appearance OCT 6, 2008 1 WEEK Appearance SEPT 15, 2008 1 WEEK	Appearance OCT 13, 2008 TWEK T0/73/2008 Appearance OCT 6, 2008 1 WEK 10/6/2008 Appearance SEPT 15, 2008 1 WEEK 9/15/2008 Appearance SEPT 15, 2008 1 WEEK 9/15/2008 Appearance SEPT 12, 2008 3 DAYS 9/15/2008

Figure 2.4: Pull Jurors for Highlighted Panel

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



🔲 Validate Passwo	rds [JMrsF]				×
Enter Passwo	rd(s) to Rand	omly Pull Jurors	6		20
Court agency code	Panel type	Panel ID		Description	
18001	Appearance OC1	6, 2008	OCT 6, 2008		
<					>
Enter Passwor	d:				
Number of p	passwords required 1				
Title clerk		Password			
		,	ıfirm <u>S</u> kip		

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.

RandomSelect [JMh5F]			
Random Select Jurors		1	
Panel ID SEPT 22, 2008	Jurors Available	72471	
Description SEPT 22, 2008			
Juror Master Year 20	008 💌	In this screen th	e Number of Active
Total Jurors Required for this Panel 1(00		indicates that 2 jurors
Number of Active Jurors 2			en transferred to this
Number of Jurors Needed 98	8		8 need to be pulled to
Number of Jurors to Select	8	meet the required	number of jurors (100).
Eiguro 2 7: Pandor	n Salaat Jurara Wi	indow	l

Figure 2.7: Random Select Jurors Window

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



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

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.

Note 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

- 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

Appearance ·	- Non-Finali	zed 🤹 🗟 🔂 🌆 🌠 🛛	🖻 🙋 🖻 🍯 🖣	🖪 🐱 🖌 🖸	ð 🗙 🛸
Panel ID	Panel type	Description	Pull Jurors from		Time to rep
OCT 13, 2008	Appearance	OCT 13, 2008	T WEEK	1071372008	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

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



Commissioner A	pproval Request [JM4ttF]					
Court agency code	18001					
Panel ID	DEC 29, 2008 Description DEC 29, 2008					
Panel type	Appearance Vumber of jurors 50					
Report Date/Time	12/29/2008 9:00 am					
MessageText	Dear Sir or Madam,					
	Dear Sir or Madam, You are requested to approve DEC 29, 2009 jusy panel scheduled for December 29, 2008 at for the Dorchester County Courth You must approve this jury panel within 24 hours of recorring this messages. Please click on the link provided below to approve this panel. If you are having trouble clicking the link, copy and paste it into your browser address box and press enter. http://www.sccourts.org?panelid=DEC 29, 2008&CA=18001&pnltype=A Thank you Cheryl L. Graham					
	Request Approval					

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.

	earance - Non-	Finalized	🌯 🛃 🖄	🌌 🗈	1 🖪 🖉 🛛	B 💀 🖌 🕒 🛛	×
	Panel ID	Panel type	Descri	ption	Date to r	eport Term of servi	ce
	FEB262008	Appearance	FEB262008		2/26/200	08 WEEK	_
	JAN302008	Appearance	IAM202000		1/28/200	08 1 WEEK	
	JAN312008	Appeara	Approved		1/28/200	08 1 WEEK	
	JEFFTST1	Appeara			3/17/200	08 1 week.	
	JSS03242008A	App earance	JSS03242008A		3/24/200	98	
	MAR142008	Appearance	MAR142008		3/14/200	08 1 WEEK	_
1	MARCH052008	Appearance	MARCH052008		3/5/2000	3 1 WEEK	
	MARCH122008	Appeara	Not		3/12/200	08 1 WEEK	
2	MARCH192008	Appeara			3/19/200	98 WEEK	
ø	MARCH202008	Appeara	Approved		3/20/200	08 1 WEEK	
2	MARCH202008A	Appearance	MARCH202008A		3/20/200	08 1 WEEK	
	STATE GRD JUB	Appearance	STATE GRD JUBY		1/2/2008	nne vear	>
		•					
	Panel		008A				
	Panel Panel ty	ID JSS03242					
	Panel ty	ID JSS03242	8				
	Panel ty	ID JSS03242 pe Appearance ion JSS03242	8				
	Panel ty Descripti	ID JSS03242 pe Appearanc ion JSS03242 ice	008A	Location	СТВМ		
	Panel ty Descripti Term of servi	ID JSS03242 pe Appearance ion JSS03242 ice 3/24/2008	e 🔽	Location	CTRM		
	Panel ty Descripti Term of servi Report Date/Ti	ID JSS03242 pe Appearanc ion JSS03242 ice 3/24/2008 ors 30	e 文 008A 3 😰 12:00 am	_	0	Pull jurors from 200	18

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.



2. Press the Pull Jurors 🔯 button, and the following screen opens:

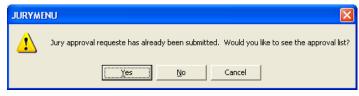


Figure 2.11: Approval Request

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

Commissioners Approval List [JM4v4F]						
Panel ID MARCH052008	Panel type	ppearance 💌	Send Reminder			
Commissioners Name	Approved	Email address label	Approval date	Арр		
Jamesetta Lovett	Г	tshuler@sccourts.org	0/0/0000	12:00:		
Travis Shuler	Γ	tshuler@sccourts.org	0/0/0000	12:00:		

Figure 2.12: Approval List

4. Exit ane return to the Appearance Panel.

Step 5. Pull Jury

RandomSelect [JMh5F]		
Random Select Jurors		
Panel ID SEPT 22, 2008	Jurors Available	₹ 72471
Description SEPT 22, 2008		
Juror Master Year	2008 💌	In this screen the Number of Active
Total Jurors Required for this Panel	100	Jurors is 2, which indicates that 2 jurors
Number of Active Jurors	2	have already been transferred to this
Number of Jurors Needed	98	panel and only 98 need to be pulled to meet the required number of jurors (100).
Number of Jurors to Select	38	meet the required humber of jurors (100).

Figure 2.13: Random Select Jurors Window

- 1. Highlight the Appearance Panel to pull jurors for.
- 2. Click the **Pull Jurors** Dutton 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 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

Appearance Panel R	eports Prompt [J	M4rsF]		23
	MARCH15		🕱 🥦 🗈 🗰 🖄	
	Report Option	Attorney List by Name		•
	Juror Master Yr	2012		
	Panel Type	Appearance 💌		
	Panel ID	MARCH15		
	3rd Party Mai	ler PDF file name		

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.

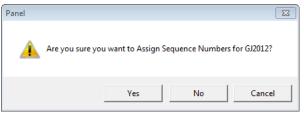


Figure 2.15: Verification Message Prompt

4. Click **Yes** to continue.



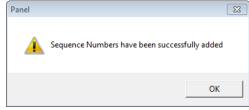


Figure 2.16: Completion Message Prompt

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

Step 2. Print the Summons¹

Appearance Panel R	eports Prompt [J	M4rsF]
	MARCH15	R 🚳 🗈 🗰 🖎 🤗
	Report Option	Attorney List by Name
	Juror Master Yr	State Grand Jury by Name
	Panel Type	Summons by Name - Lagistrate Summons By Name Grand Jury
	Panel ID	MARCH15
	3rd Party Mai	er PDF file name

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** 团 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.*



	Cherokee			03/03/2008		JURCE NU-BUR:	1
You are herebys	summoned to applea	rat Cherol	t 🗢 County	r Courthouse,	125 E. Floyd	BekerBlvd. Geffn	oy, S.C., 29340
on	March 03, 2008	ut 10:00 a	m	to answ	ver this surm	nons to serve as a p	etit juror for
the Court of Con	nmon Pleas and Ger	heral Sessio	ons. Failur	e to appear a	at the address	above at the speci	řied time m <i>a</i> y
subject you to pe	enalties as prescribe		Prop. di I	Ma Daa		Phone: (844)	487.9571
		rk of Court,		мсвее	-		
	NAME AND ADDR	BBOFJURO	R			IT IN FORMATION AND IN	
1715	EN, LARR.Y S N MOUN IAIN SI CRSBURG, SC 29702				Secure i and be reading all be a contract on reading bound privates WITHIN THESE provide of the fo	na din faranza a na da si Juna ang na praveza na na faranz and u an la sedin di esti Juna na dua aggine na yau Segu a fuha gage a da faranza sedin EDAYS OF RECEDET i sum na na na gibe a self-addressedin	uaa belaw Afia Regaane Secuaa, and belaw aad and belaw aad a de banaaa
х				nat the dotted line. 14			
	FORMATION SEC		CTOC MARINE INSPECTS INCOMENTS INCOMENTS INCOMENTS	d wang the set within 0.0 AD 2 AD 0.0 A	saadamadqa proxis	ni Junice Malander	1
CIN, COUNTY, STATE C	ERNIGR MELOLINI		WEDROR DI	03/03/2008		MARED SIGLE WID	•
				25/1953			0 0
YOUR OCCUPATION				FORMER EMPLOY	BR.		POP YEARS
LEVEL OF FORMULEDU				NUME OF SPO	USE.		
SPOUSE SOCCUPATION				S.SENT OR FORME			
			SPOUSE'S PE	ESENT OR FORME	REMPLOYER		PG PD43
HAVE YOU EVER		HAVE YOU EV	ER BEEN APAR	WY TO ACT ALL LOW	ISURY DVES		
CAR YARY OR	CRIMINAL JURY?	<u> </u>					Dyes DNO
F SQ WHEND					CT JOTHER THAN A	MINOR FRAFFICOFFEMSE)	LAES DNO
NAME AND/OR AD	DRESS CORRECTION:	if the intermat	ton below i si	noorreat, piezse v	wite in the correct ALLEN, LARRY	liniomation in he space p 'S	rouided to the left. MSR-1
NAME AN DOR AD	ORESS CORRECTION:	if the intermat	ion below i ch		ALLEN, LARRY 1715 N MOUNT	'S AIN ST	rouided io ine ien). Mar-1
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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.

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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 D 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 **Exit** the Report window.









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.

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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.

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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

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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** Subtron to display the **Attorney List by Name** report on your computer screen before printing, or click the **Print** button.

_	Report Preview Image: Constraint of the second s	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	Format Acrobat Format (PDF) Destination Disk File OK Cancel	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** subtron 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.

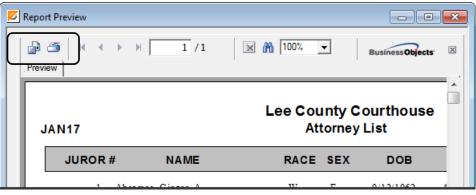


Figure 41: Preview Report Screen

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

CrystalPreview	vExportJury2 [JM5cdF]		×
Format Destination	Acrobat Format (PDF)	▼ OK Cancel	

Figure 4.2: Export Screen

2. Select the **Format**.

CrystalPreview	ExportJury2 [JM5cdF]		×
Format	Excel 5 (XLS)		•
Destination	Acrobat Format (PDF) Comma Separated Values (CSV)		
	Excel 5 (XLS) Excel 5 (XLS) Extended	3	Ţ

Figure 4.3: Export Window (Format)

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



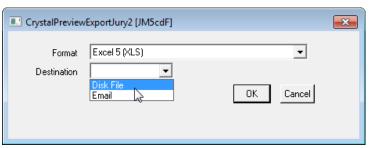


Figure 4.4: Export Window (Destination)

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.

🗾 Save As					×
🕞 🗢 📕 🕨 Computer 🔸 Local Disk (C:)	►	temp	► ► ► Searc	h temp	٩
Organize 🔻 New folder					0
ForfLogs Premius Disk 1	*	Nai	me	Date modified	Туре
			Clarific case	2/19/2013 2:37 PM	File fol
 Program Files 			Wire(SIQ)_	10/23/2012 12:34	File fol
Program Files (dtf)			SedDisp1113202.84	11/13/2012 11:14	Text D
Fub_inc 5CID.Install		\leq	WinSQL Lite Serial Number mig	10/16/2012 2:58 PM	Outloc
SatOffDala		-	WinGQL ap	10/16/2012 2:47 PM	Comp
temp	h				
TempJMSfiles					
Users	Ε				
a wedievel					
Mirredianes:	۳				
🖵 public (Taccourts) (Ht)					
👷 bshoolbred (Haccourts/271usen) (P)	Ŧ	•			۰.
File name: Report					•
Save as type: PDF					•
Hide Folders			Si	ave Cancel	

Figure 4.5: Disk File Destination



Destination: Email

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

💷 Email Att	ached File [JM5ceF]		X
To:	bshoolbred@sccourts.org		Send
CC:			
From:	anything@madeup.net		
Subject:	Report		
Attachment:		*	
	\BSHOOLBRED\CrystalReport.PDF	-	
Messager	/ This is the second hold one should Discourse incl	_	
message.	This is the report I told you about. Please review.	^	
		-	
1	,		

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

🗖 Manage	Panel detail [JM2hrF] -	Dorches	ter County Courthouse			×
Panel Ju	urors - Active	S.	v 🌌 🄏 💽 🖻 🧉) 💲 🖻	😡 🗿	ñ. 🖌 🛸
Pa	nel ID SEPT 22, 2008	Pane	l type Appearance 🔍]	🗖 Sc	rt By Sequence
Number of	jurors 100	# A	active 100 # Ava	ilable 🛛		
Report Date	/Time 9/22/2008 8:00 am	Loc	ation CTR Term of se	ervice 3 DA	YS	
Change Sta	tus for Selected Rows [COV]	Change Statu	st			
Seq Nbr	Juror name	Juror pur	nder Juror Status Code	Active	Present	Service d
5	Atwood, Concetta M	2648	PU	V		0/0/0000
6	Bailey, Edwin F	3095	PU	V		0/0/0000 💻
7	Baxter, Everett W JR	4822	PU	$\overline{\checkmark}$		0/0/0000
8	Beckett, Donna M	5223	PU	×		0/0/0000
9	Boutin, Jason M	8136	PU	\checkmark		0/0/0000
10	Boyd, Okley J	8580	PU	\checkmark		0/0/0000 🔽
<						>

Figure 5.1: Locate Juror

You can also change the status for multiple jurors. For example, if 3 jurors are over the age of65 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.

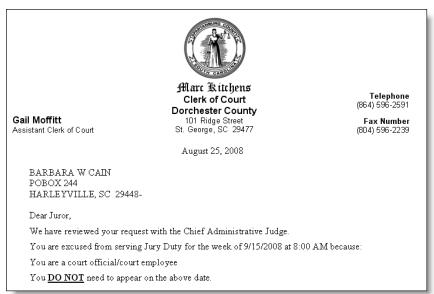


Figure 5.2: Example Excuse Letter

Step 4. Add or Edit Biographical Data

🗖 Manage	Panel detail [JM2hrF] -	Dorchester C	ounty Courthouse	_		X
Panel J	urors - Active	P 🛛	' 🏂 🐷 🖻 🦉	\$ 🖻	😡 🗿	ng 🖌 😒
Number o Report Date	anel ID SEPT 22, 2008 f jurors 100 e/Time 9/22/2008 8:00 am atus for Selected Rows	Panel type # Active Location Change Status	100 # Avai	al info lable () rvice (3 DA)		ort By Sequence
Seq Nbr	Juror name	Juror number	Juror Status Code	Active	Present	Service d 🔼
5	Atwood, Concetta M	2648	PU	V		0/0/0000
6	Bailey, Edwin F	3095	PU	V		0/0/0000 💻
7	Baxter, Everett WJR	4822	PU	V.		0/0/0000
8	Beckett, Donna M	5223	PU	V		0/0/0000
9	Boutin, Jason M	8136	PU	$\overline{}$	\square	0/0/0000
10	Boyd, Okley J	8580	PU	×		0/0/0000 💌
<						>

Figure 5.3: Appearance Panel

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



	Juror Information
ſ	General C Precinct C Personal
L	
	Court agency 18001 Juror Master Year 2008
	Juror # 1114 Registration Number 18250046
	Last Name Aller
	First/Mid/Sfx George R
	Address 103 INWOOD PL
	City SUMMERVILLE SC 29485
	Home Phone Address changed
	Birth Date 5/10/1929 Social Security # 000-00-7173
	Driver Lic #
	Race White V Sex M V
	Prior Service
	Served date 0/0/0000
	Selected Status Code PU
	Mileage 0.00

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.

Juror Information 🛛 🖌 🖸 🕅	\$
🗀 General 🕕 Precinci 🕼 Personal	
Occupation TEACHER	
Number of Children 2 Years of County Resident 12	
Marital Status Widowed	
Employer Information	
Employer GARDEN HILLS HIGH SCHOOL	
Address 3219 Main Street	
City, South Carolina	
Phone (803) 555-1212 x	
Spouse Information	
Name Deceased	
Occupation	
Employer	
Education Masters in Education-Clemson	
Yrs Employed 8	

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 \checkmark to save and close the window.









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.

Ivlanage	Panel detail [JM2hrF]] - Lee County	y Courthouse			\frown	Σ
Panel J	urors - Active	2	🦻 🌌 🖻	I	3 🖉 💲	• • • •	<u>*</u>
Pa	anel ID MAR5-7		Panel type Appear.	ance	~	Sort	By Sequence
Number o	f jurors 50		# Active 50		# Available 0		
Report Date	e/Time 3/5/2013	9:00 am	Location CR10	 Terr	m of service 3 o	days	
Change Sta	atus for Selected Rows	Change	Status				
Seq Nbr	Juror name	Juror number	Juror Status Code	Active	Present	Service date	Summons 🔺
Seq Nbr 1	Juror name Abbott, Christopher	Juror number 39	Juror Status Code PU	Active	Present	Service date 0/0/0000	Summons 🔺
1					Present		Summons 🔺
1 2	Abbott, Christopher	39	PU	~	Present	0/0/0000	Summons A
Seq Nbr 1 2 3 4	Abbott, Christopher Abbott, James R SR	39 44	PU PU	V	Present	0/0/0000 0/0/0000	Summons A

Figure 6.1: Panel Detail

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



Transfer Jurors Prompt [JMiwF]		
From: Panel Type Appearance Panel ID MAR5-7	To: Panel Type Appearance)
Comments		

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 🜌

🔝 Select Panel Header [JMfkF] - Lee County C 🞫					
Select Panel Header - Non-Fina 🛛 🕺 🖌					
Panel ID	Panel type				
FEB11-13	Appearance	FEB11-13			
JAN17	Appearance	JAN17			
MAR19-21	Appearance	MAR19-21			
MAR5-7	Appearance	MAR5-7			

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

Juror name	Brown, Patricia B	Juror # 16	
Reply date	0/0/0000 Group #	Service date 0/0/0000	
Status	TO Present CActive	Summons printed	Number of times transferred 1



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.

Manage Panel detail [JM2hrF] - Lee County Courthouse
Panel Jurors - Inactive 🎇 🦻 🖉 🗟 🕼 🖉 🛸 🖌 🛸
Panel ID MAR5-7 Panel type Appearance 🗸 🔽 Sort By Sequence
Number of jurors 50 # Active 49 # Available 0
Report Date/Time 3/5/2013 9:00 am Location CR10 Term of service 3 days
Change Status for Selected Rows Change Status
Seq Nbr Juror name Juror number Juror Status Code Active Present Service date Summons pri
4 Abbott, Tara J 59 TO 🗌 0/0/0000
<
Un)Mark Present
Juror name Abbott, Tara J Juror # 59 Number of times transferred 1
Reply date 0/0/0000 Group # Service date 0/0/0000 Juror Mileage 0.00
Status TO Present Active Summons printed Conflict date 1 0/0/0000
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 \bowtie 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** D button.

Undo Appearance Panel Transfer
THIS PROCESS CAN NOT BE REVERSED. PLEASE BE SURE BEFORE UNDOING THE TRANSFER
Juror 59 Abbott, Tara J
Reset Values For Juror Status Code Juror Panel Sequence Number Number of Times Transferred
Figure 6.5 : Unde Appearance Banel Transfer

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.

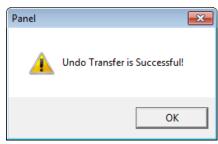
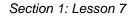


Figure 6.6: Validation Message Prompt





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

📕 Manage	Panel detail [JM2hrF] -	Dorchester C	ounty Courthouse			
Panel J	urors - Active	P 🕺	' 🗟 📑 🖻 🥥	\$ 🖻	😡 🎒	ñ. 🖌 🛸
Pa	anel ID SEPT 15, 2008	Panel type	Appearance 📃 💌		🗖 So	rt By Sequence
Number of	f jurors 150	# Active	148 # Avai	lable ()		
Report Date	e/Time 9/15/2008 8:00 am	Location	CTR Term of set	vice 1 WE	EK	
Change Sta	atus for Selected Rows DEC	Change Status				
Seq Nbr	Juror name	Juror number	Juror Status Code	Active	Present	Service d
7	Barrineau, Robert	4300	PU	\checkmark		0/0/0000
8	Beasley, Christie L	5056	PU	V		0/0/0000 💻
9	Beck, Laura E	5193	PU	$\overline{\mathbf{A}}$	Γ	0/0/0000
10	Begley, Joseph R	5328	PU	1		0/0/0000

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.



🔲 Manage	Panel detail [JM2hrF] -	Dorchester C	ounty Courthouse				
Panel J	urors - Inactive	P 💯	' 漋 💽 🖉	\$ 🖻	💀 🖨	n 🖌 😒	
Pa	nel ID SEPT 15, 2008	Panel type	Appearance 📃 💌		🗖 Sc	rt E Toggle Active/:	Inactive/All Jurors
Number of	jurors 150	# Active	145 # Avai	able 145			
Report Date	/Time 9/15/2008 8:00 am	Location	CTR Term of ser	vice 1 WE	EK		
Change Sta	tus for Selected Rows	hange Status					
Seq Nbr	Juror name	Juror number	Juror Status Code	Active	Present	Service d 🔼	
1	Adams, Victor R	404	то		V	0/0/0000	
6	Barlett, Lea A	3995	то		1	0/0/0000	
9	Beck, Laura E	5193	DEC		Г	0/0/0000	
23	Cain, Barbara W	13306	СТО		V	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

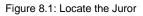
✤ .Add a juror to an Appearance Panel manually.

Step 1. Access Jury Master Wide

Open the Jury Wheel folder and select Juror Master Wide.

Step 2. Locate the Juror

Juror Mastei	r Wide			% 🌠 📑	2 🖻 💲	🖳 🖌 🗅 🖂 🕸
Juror Year 2008	👻 🛛 Last N	lame cadv	vell	First Name		Middle
Juror# 0		DOB 0/0/	0000	SSN		
Last Name	First Name	iddle Narr	Juror number	DOB	SSN	Address
Cadwell	David		13265	11/19/1968	000-00-9969	Position to
Cadwell	Susan	В	13266	11/25/1949	000-00-8705	313 DUPONT WAY



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** Dutton, and the password window opens.
- 2. Enter the password and click \checkmark to continue.

Select Panel Header [J	M225F] -	Dorc 🔀
Select Panel Header -	Non-Fina	ñ.,
Panel ID	Panel type	
OCT 13, 2008	Appearance	OCT 13, 20
OCT 6, 2008	Appearance	OCT 6, 200
SEPT 15, 2008	Appearance	SEPT 15, 2
SEPT 22, 2008	Appearance	SEPT 22, 2
SEPT 29, 2008	Appearance	SEPT 29, 2

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

Appearance Panel R	eports Prompt [JI	M4rsF]	×	
	MARCH15		9 🚳 🗈 群 🖷 🖄 🔍 🗿	
	Report Option Juror Master Yr	Badges By Name Attorney List by Name	 ▼ 	
	Panel Type Panel ID	Attorney Detailed List Badges By Name Badges Detail List MARCH15		
	3rd Party Maile	, er PDF file name	<u></u>	

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.









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.

Appearance Panel Report Panel Pan	eports Prompt [J	M4rsF]
	Report Option	Election commission report by dat Generate Rap Sheet
	From date Through date	0/0/0000
	3rd Party Mai	ler PDF file name

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.

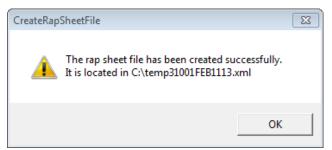


Figure 11.2: Rap Sheet File Verification Prompt

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









Section 2: Court Day Procedures

Lesson 12: Marking Jurors Present in JMS	45
Part I. Mark Jurors Present by Scanning a Barcode	45
Part II. Manually Mark Jurors as Present	
Part III. Manually Mark Multiple Jurors or All Jurors as Present	
Part IV. Manually Mark Jurors Present from the Appearance Panel	
Part V. Print Juror Present List Report	48
Lesson 13: Juror Excused by Judge	51
Lesson 14: Protect a Juror	53
Option 1: Mark Not Present	53
Option 2: Conflict Date	54
Lesson 15: Create Trial Panels	55
Lesson 16: Pull Jurors for a Trial	57
Lesson 17: Return Jurors to the Appearance Panel	61
Option 1: Quick Return Jurors	61
Option 2: Return One or More Jurors	62
Option 3: Return All Jurors	62
Lesson 18: Retrieve Jurors Returned to the Appearance Panel	65
Lesson 19: Print or Re-shuffle a Random Strike Sheet	69
Part I. Print a Random Strike Sheet	69
Part II. Re-shuffle a Random Strike Sheet	70









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.
- 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.



		al 🕳
l	Mark Present Barcode	<u> </u>
	Hello and welcome to Jury Duty	
	Please follow the instructions below	
	Panel ID Panel type Appearance	
	Juror pulled from 2008	
	Juror number 0	
	Date present 4/3/2008	
	Juror Information	
	,	
	1. Pass your Juror Badge through the scanner 2. Scanner can accept badges in either direction 3. Bar Code must face light 4. Wait for message	
	Panel Juror Statistics Active 0	

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

Mark Present Alpha/n	umercially	🖌 🛃
Panel ID	Panel type Appearance	
Juror pulled from	2008 💌	
Juror number	0	
Date present	<mark>4/3/2008 []]</mark>	
	Panel Juror Statistics	
	Active 0 Available 0	

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 dot to save, and a **Mark Present** screen opens.



Mark Present				.	1 🗹 🗴	1
Panel ID TEST2	Pa	anel type Appearance	-			
Juror pulled from 2008 💌		r number 10309	# Active	50 # Av	ailable 47	7
Juror name	Date	present 2/15/2008	2			
	Juror number	Present for Panel ID	Present	Date present	Pay rate	# Miles Mi
Juror name						

Figure 12.3: Mark Present Screen-Mark One Juror

5. Double-click in the **Present** checkbox and click is 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 *A*, and a **Mark Present** screen opens.

Step 2. Mark Multiple Jurors as Present

Mark Jurors Present [JM	ivtF] -						
lark Present					2 🗹 🗴	1	*
Panel ID TEST	Pa	anel type Appearance	•				
luror pulled from 2008 💌	Juro	r number 0	# Active	24 #A	vailable 🛛		₽
Juror name	Date	e present 2/15/2008	5 <u>7</u>				
Juror name	Juror number	Present for Panel ID	Present	Date present	Pay rate	# Miles	M
Britt, Rufus III	9836			0/0/0000	0.00	0.00	-
Carter, Wilbur A JR	14986		~	2/15/2008	10.00	0.00	
Dailey, Keyania S	21033			0/0/0000	0.00	0.00	
Ellison, Terry L	26774		~	2/15/2008	10.00	0.00	
Garcia, Shelly C	31742			2/15/2008	10.00	0.00	
Green, Bertie M	35314		The state	0/0/0000	0.00	0.00	
Green, Wendy M	35732			0/0/0000	0.00	0.00	
Gulliford, Karl R	36801			0/0/0000	0.00	0.00	

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 do 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 \blacksquare 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								
Filtere	ed 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	М	11/27/1979	0		
3	7009	Aldridge, Edmund C III	819	W	М	2/10/1945	0		
5	1529	Alexander, Anita E	852	W	F	9/7/1931	0		
7	3066	Barrineau, Robert	4300	W	М	10/19/1984	0		
8	5512	Beasley, Christie L	5056	W	F	3/23/1973	0		
10	8351	Beglev, Joseph R	5328	W	М	11/1/1988	0	//	
11	9568	Bentlev, Kama E	5945	W	F	7/8/1957	0		
12	8472	Bordonaro, Patrick A	7935	W	М	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	М	12/8/1985	0		

Figure 12.5: Example Juror Present List Report









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

🔲 Manage	Panel detail [JM2hrF] -	Dorchester C	ounty Courthouse			×
Panel J	urors - Active	P 💯) 🗟 📓 🖉	\$ 🖻	😡 🎒	ñ. 🖌 🛸
Pa	nel ID SEPT 15, 2008	Panel type	Appearance 📃 💌		🗖 So	rt By Sequence
Number of	jurors 150	# Active	148 # Avail	able ()		
Report Date	/Time 9/15/2008 8:00 am	Location	CTR Term of ser	vice 1 WE	EK	
Change Sta	tus for Selected Rows DEC	hange Status				
Seq Nbr	Juror name	Juror number	Juror Status Code	Active	Present	Service d 📥
7	Barrineau, Robert	4300	PU	$\overline{\checkmark}$		0/0/0000
8	Beasley, Christie L	5056	PU	V		0/0/0000 💻
9	Beck, Laura E	5193	PU	V	Γ	0/0/0000
10	Begley, Joseph R	5328	PU	\checkmark		0/0/0000

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.



Manage Panel detail [JM2hrF] - Dorchester County Courthouse						
Panel Jurors - Inactive 🖉 🦉 🎇 😰 🖉 💲 🖻 🧔 🍜 🐂 🖌 😒						
Panel ID SEPT 15, 2008	Panel type	Appearance 📃 💌		∏ So	rt E Toggle Active/	Inactive/All Jurors
Number of jurors 150	# Active	145 #Ava	iable 145			
Report Date/Time 9/15/2008	8:00 am Location	CTR Term of se	rvice 1 WE	EK		
Change Status for Selected Rows	Change Status					
Seq Nbr Juror name	Juror number	Juror Status Code	Active	Present	Service d	
1 Adams, Victor R	404	ТО		V	0/0/0000	
6 Barlett, Lea A	3995	то		\checkmark	0/0/0000	
9 Beck, Laura E	5193	DEC	Г	Г	0/0/0000	
23 Cain, Barbara W	13306	СТО		V	3/12/2008 📃	

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.

🔲 Manage	Manage Panel detail [JM2hrF] - Dorchester County Courthouse								
Panel J	Panel Jurors - Active 🖉 🖉 🐨 🐻 💷 🧟 🛸 🖌 💉								
Pa	Panel ID SEPT 29, 2008 Panel type Appearance 🔽 🔽 Sort By Sequence								
Number of	jurors 150	# Active	10 # Avail	able 10					
Report Date	/Time 9/29/2008 8:00 am	Location	CTR Term of ser	vice 1 WE	EK				
Change Sta	tus for Selected Rows	hange Status							
Seq Nbr	Juror name	Juror number	Juror Status Code	Active	Present	Service d 📥			
1	Braxton, Archie E	9194	PB		1	2/26/2008 📃			
2	Cain, Robert G	13325	PB	V	V	2/26/2008			
3	Devine, Mary A	23319	PR	V	\checkmark	2/26/2008			
4	Hodges, Cassandra R	42060	PR	$\overline{\checkmark}$	$\overline{\checkmark}$	2/26/2008			
5	Keevin, Lillian E	49173	PR	×	×	2/26/2008			
6	Lilley, Cheryl S	54417	PR	V	V	2/26/2008 💌			
<						>			
	I •				<u>(</u>	Jn <u>)M</u> ark Present			

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.

🔲 Manage	e Panel detail [JM2hrF] —	Dorchester C	ounty Courthouse				X	
Panel J	lurors - Active	P 💯	' 🎭 👿 🖉	\$ 🖻	😡 🗿	ñ.,	-	
P	anel ID SEPT 29, 2008	Panel type	Appearance 💌	1	∏ So	ort By Seque	ence	
Number o	of jurors 150	# Active [10 # Avai	lable ()				
Report Dat	e/Time 9/29/2008 8:00 am	Location	CTR Term of se	rvice 1 WE	EK			
Change St	atus for Selected Rows	hange Status						
Seq Nbr	Juror name	Juror number	Juror Status Code	Active	Present	Service	date	
4	Hodges, Cassandra R	42060	PU	$\overline{}$	Γ	2/26/200	8	
						-	uror or in	u can enter a 's mileage here Mileage Quick rry in Payment
HODGES					(L	Jn <u>)M</u> ark	F	Processing.
	ne Hodges, Cassandra R te 0/0/0000 Group #		112000	Number of tir Juror Mileag	nes transferre e	d 0		
Stati	us PU 🔽 Present 🔽	Active 🗖 Sur	initiatio printiaa	Conflict date Conflict date	1.0.00		_	

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.

Edit Conflict Dt Notes [JM2dhF]	
Conflict Date Notes	🗾 🔯
Hodges, Cassandra R	
Entered by BSH00LBRED Date Entered 3/17/2008 Conflict date 10/1/2008 IV	
Notes Doctor's Apppointment	

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 I 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	2007CP420	0001	Panel	type Trial	v
Description	2007CP420	0001			
Term of service	1 week		R	eport Date/Time	e 3/1/2008 😰 12:00 am
Location	CTR				
Number of jurors	47	# Active [45] # Available	e 45
Jury type	SGJ	Judge		Trial type	e
Trial From	3/1/2008	😨 To	3/1/2008	E 2	
	Finalized	Date	0/0/0000	Panel Floo	n
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.

Select Jury type [Jk		
Select Jury Type		
Description	Jury type code	
Petit Jury	PJ	J Select
State Grand Jury	SGJ	$\overline{}$
Figure 15.3: Sele	ct Jury Type Wind	low

- 8. Highlight the jury type, and click the **Select** Subtron.
- 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** subtraction button to save the panel record. It displays in the grid area of the **Trial Panel Wide** screen.

Trial Panel - No	on-Finalized	🖌 🖉	🔁 💇 🖻 🐼	<u> </u>	😼 🖌 🗅 >	< 🛸
Panel ID	Panel type	Descript	ion T	Term of service	Date to report	Tim
2007CP4200001	Trial	2007CP4200001	1 wee	k	3/1/2008	12:00
2007CP4200002	Trial	2007CP4200002	1 wee	k	3/1/2008	12:00
						>
		•				
Panel ID	2007CP420000)1 Par	nel type	v		
Description	2007CP420000	01				
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 3/1/200	8 😰			
	Finalized	Date 0/0/000	0 Panel Floor			
Last Update:						

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

Trial Panel - Noi	n-Finalized	🧉 🏂 🔂 🖉 🗉	• 🖪 🖻 🔳 •	ø 🖌 🕒	X
Panel ID	Panel type	Description	Verm of service	Date to renor	
2007CP4200001	Trial	2007CP4200001	Pull active and preser	47272000	Panel 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

Pull Jurors for Trial Panel [JM102F]
Pull Jurors 🖌 📝
From Panel
Panel type Appearance
Panel ID SEPT 15, 2008
Description SEPT 15, 2008
Number of jurors 150 # Active 141 # Available 141
To Panel
Panel type Trial
Panel ID 2007CP4200002
Description 2007CP4200002
Total Jurors Required for this Panel 35
Number of Jurors Active 18
Number of Jurors Needed 17
Number of Jurors to Select 17
Comments

Figure 16.2: Pull Jurors Window

- 1. Enter the **Panel ID** for the Appearance Panel to pull jurors from. You can doubleclick in this field to open a Select window that lists all active Appearance Panels.
- 2. Click the **Save** sutton 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

Trial Panel - Nor	n-Finalized	🧉 🏝 🛃 🌌 🖻	a 🙉 🗉 🜉 I	2 🗴 🖌 🛌	-
Panel ID	Panel type	Description	Term of service	Date to report	Tim
2007CP4200001	Trial	2007CP4200001	1 week	Reports 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.



Appearance Panel R	eports Prompt [JI	M4rsF]		×
	MAR19-21	X	🖹 🗱 📑 🔊	९
	Report Option	Random Strike Sheet		•
	Juror Master Yr	Random Stike Sheet - By Name Random Strike Sheet	К	
	Panel Type	Random Strike Sheet - PaperStrike Solicitor Report	2	+
	Panel ID	MAR19-21		
	3rd Party Maile	er PDF file name	E	

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.

				ity Courth			
DGE NAME: IAL TYPE: NEL ID: 2007CP420000 URTROOM CTR				2007CP420000	-		Sorted by: Random Nbr Trial
NAME	JUROR NBR	RACE	SEX	ST/PLTFF	DEF	CRT	REMARKS
1 Hardy, Veronica	30	В	F	()	()	()	
2 Carroll, Linda L	8	w	F	()	()	()	
3 Lawson, Shane T	39	w	М	()	()	()	
4 Geddis, Inez Mary	24	в	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	М	()	()	()	

Figure 16.5: Example Random Strike Sheet









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 reselected 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.

	🗖 Manag	e Panel detail [JM4djF]	- Dorchest	er County Court	house			
	Panel	Jurors - Active	Þ	💇 狑 💽 🛛	0 🧟 💲 🖻	😡 🖉	i 🐁 🖌 🛸	
	F	Panel ID 2007CP4200001	Panel	type Trial	Ŧ	□ 9	Sort By Sequence	
	Number	of jurors 47	# Ac	otive 45	# Available 45			
_	Report Dal	te/Time 4/2/2008 12:00 a	im Loca	ation CTR Te	rm of service 1 wee	ek		
	Change S	tatus for Selected Rows	Change Statu	s				
	Keep?	Juror name	Juror numb	er Juror Status C	Code Active	Present	Service dat 🔨	
		Browing, Marcella A	10309	PR		I ICSCIR [√	2/13/2008	
(4`		Brown, Romeigus M	11117	PR	\checkmark	V	2/13/2008	
\smile		Carroll, Linda L	14648	PR	\checkmark	V	2/13/2008	
		Chandler, Kiante	15559	PR	\checkmark	\checkmark	2/13/2008	This counter
		Clark, Bernice I	16445	PR	×	V	2/13/2008	indicates the
_		Clawiter, Christine L	16773	PR	\checkmark		2/13/2008 💌	
					(5)	. –	eep/Return Jurors	number of jurors selected.
					<u> </u>			

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.

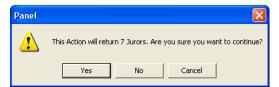


Figure 17.2: Verification Message Prompt

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.

Manage Panel detail [JM2hrF] - Dorchester County Courthouse							
Panel Jurors - Activ	'e	P 🛛 🖬	8 🛯 🤇	1 💲 🛍	💀 🗿 🐁	🖌 😒	
Panel ID 2007CP420	0002	Panel type Trial	-]	🔲 Sort By	Sequence	
Number of jurors 10		# Active 10	# Ava	ailable 10			
Report Date/Time 3/1/2008	12:00 am	Location CTR	Term of s	ervice 1 wee			
Change Status for Selected Ro	ws Chang	ge Status					
Juror name	Juror number	Juror Status Code	Active	Present	Service date	Sumr	
Braxton, Archie E	9194	PR	V	V	2/26/2008		
Cain, Robert G	13325	PR	\checkmark	\checkmark	2/26/2008		
Devine, Mary A	23319	PR	×	×	2/26/2008		
Hodges, Cassandra R	42060	PR	V	V	2/26/2008		
Keevin, Lillian E	49173	PR	V	V	2/26/2008		
Lilley, Cheryl S	54417	PR	V	×	2/26/2008		
					<u>B</u> etu	rn Jurors	

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.

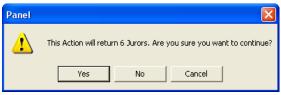


Figure 17.4: Verification Message Prompt

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.



Transfer Jurors Prompt [JMiwF]		×
Return Jurors		~
From: Panel Type Trial V Panel ID 2007CP4200002	To: Panel Type Appearance	

Figure 17.5: Return All Jurors

4. Click v to complete the return process.









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

Trial Panel - Noi	n-Finalized	🧉 🤔 🔁 🌠 I	• 🔍 = 4 🖪 .	• 🖌 🕒	X 🛸
Panel ID	Panel type	Description	Serm of service	Date to repor	
2007CP4200001	Trial	2007CP4200001	Pull active and prese	nt Jurors for Trial 47272000	Panel 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

Pull Jurors for Trial Panel [JM102F]
Pull Jurors
From Panel
Panel type Appearance
Number of jurors 150 # Active 117 # Available 117
To Panel
Panel type Trial Panel ID 2008CP4500023
Description 2008CP4500023
Total Jurors Required for this Panel 18 Number of Jurors Active 16 Number of Jurors Needed 2 Number of Jurors to Select 2
Comments

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

Sele	at 2 Jurors for Trial Panel			selected	_	
Includ	e Juror name	Panel ID	Panel type	Juror number	Active	Present
	Aldret, Richard C II	SEPT 15, 2008	Appearance	809	1	
	Aldridge, Edmund C III	SEPT 15, 2008	Appearance	819	\checkmark	
	Alexander, Anita E	SEPT 15, 2008	Appearance	852	$\overline{\mathbf{v}}$	
	Beasley, Christie L	SEPT 15, 2008	Appearance	5056	V	This screen only
	Begley, Joseph R	SEPT 15, 2008	Appearance	5328	V	displays active and
	Bordonaro, Patrick A	SEPT 15, 2008	Appearance	7935	V	present jurors who
	Bounds, Anne E	SEPT 15, 2008	Appearance	8110		
	Bowers, Linda L	SEPT 15, 2008	Appearance	8269	V	belong to the
	Brickle, Wesley D	SEPT 15, 2008	Appearance	9466	V	appearance pane
	Brienza, Dena G	SEPT 15, 2008	Appearance	9506	V	specified in the
	Bright6, Tradene	SEPT 15, 2008	Appearance	9574	V	previous screen.
	Brown, Erma	SEPT 15, 2008	Appearance	10602	V	providuo corcom
		SEPT 15, 2008	Appearance	11734	V	
rch for the juro	ilalacao, Teresita B	SEPT 15, 2008	Appearance	12074	\checkmark	
	all, Wilfred A	SEPT 15, 2008	Appearance	12086	V	
	Burk, Sharma M	SEPT 15, 2008	Appearance	12480	V	
					_	>

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.









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

Appearance Panel R	eports Prompt [J	M4rsF]
	MAR19-21	R 🚳 🖻 🗰 🖎 Q 😂
	Report Option	Random Strike Sheet 🗨
	Juror Master Yr	Random Stike Sheet - By Name
	Panel Type	Random Strike Sheet - PaperStrike
	Panel ID	MAR19-21
	3rd Partu Mail	er PDF file name

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** subtron to first display the Random Strike Sheet on the computer screen.



_	Report Preview	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	CrystalPreviewExportJury2 [JM5cdF] Format Acrobat Format (PDF) Destination Disk File OK Cancel	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

💷 Appearance Panel R	eports Prompt [JM4rs	sF]		8
	MAR19-21		🕱 🧐 🖻 🗱 🎫	<u>r</u>
	Report Option Ra	andom Strike Sheet		Reshuffle Panel
	Juror Master Yr 20	13		
	Panel Type	pearance 👻		
	Panel ID MA	AR19-21		
	3rd Party Mailer PD	DE file name	<u>4=4</u>	
		ine name j	<u> </u>	

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.

	Report Preview Preview Preview	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	CrystalPreviewExportJury2 [JM5cdF] Format Acrobat Format (PDF) Destination Disk File OK Cancel	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.









Section 3: Payment Processing and Financials

Lesson 20: Enter Juror Mileage	5
Part I. Quick Mileage Entry	5
Part II. Mark Present Alpha/numerically70	6
Lesson 21: Print Payment Vouchers for Jurors7	7
Lesson 22: Print Checks79	9
Lesson 23: Reprint Checks	3
Part I. Void the Original Check	3
Part II. Reprint the Check	4
Lesson 24: Reconcile a Bank Account8	5
Part I: Reconcile	5
Part II: Automatic Bank Account Reconciliation8	7
Lesson 25: Print a Check Register Report99	9
Lesson 26: Generate a Statement Reconcile Report and Bank Account	
Register	1
Lesson 27: Close Appearance Panels and Trial Panels	3
Part I. Finalize an Appearance Panel10	3
Part II. Finalize a Trial Panel104	4
Lesson 28: Reconcile with Combined Bank Accounts and Court Agencies 10	5









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

Mileage Q	uick En	try - Unpaid D	ays Pi	resent				4	
Service from (0/0/0000	To 0/0/0000	Panel ID			Panel type ×	Blank	-	
Juror number)	Year 2008 💌							ſ
🔽 Update All D	ays for Juror						_	_	
Svc Date	Juror #	Name	#Days	# Miles	Mileage rate	Amount	Pay rate	F 🗹	•
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 **2**, and the **Mark Present** screen opens.

Step 2. Enter Mileage

Mark Prese	ent						2 <u>2</u>	1 🗹 🖳 🗸	1
Panel ID	TEST		Pane	el type Ap	pearance				
Juror pulled from	2008	•		umber 0		# Active	24 #Av	ailable ()	
Juror name	, 		Date p	resent 2/	15/2008	<u>.</u>			
Present fo	r Panel ID	Present	Date present	Pay rate	# Miles	Mileage rate	Total Payment	Present for Par	el ty
Present fo	r Panel ID	Present	Date present 2/15/2008		# Miles 15.00	Mileage rate 0.400	Total Payment 22.00	Present for Par	el ty
Present fo	r Panel ID				15.00	-	-	Present for Par	el ty
Present fo	r Panel ID	.	2/15/2008	10.00 10.00	15.00	0.400	22.00	Present for Par	el ty
Present fo	r Panel ID	v	2/15/2008 2/15/2008	10.00 10.00	15.00 6.50 12.50	0.400 0.400	22.00 15.20	Present for Par	el ty

- 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 \boxtimes 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

□ [JM13aF]	X
Select Document	*
Document Description	Document ID A
Additional Information	09ADINF
Clerk No Show Letter/FTA	06RESCHD
Court Cancellation	11CTCAN
Excuse Letter	03EXLET
Grand Jury Notice	04GJLET
Juror Pay Voucher	05PJPAY
Jury Commissioners	13JURCOM

Figure 21.1: Select Document Window

- 1. Click the **Print Document** with 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) 898-5853 EMAIL LeJette G@Co.Pickets (3C.US	Office of Clerk of Court Dorchester COUNTY Cheryl L. Graham - CLERK 101 Ridge Street St. George, SC 29477	CIVIL RECORDS (864) 898-8862 CRIMINAL RECORDS (864) 898-8864 FAMILY COURT (854) 898-5919
STATE OF SOUTH CAF DORCHESTER	ROLINA)))	
I, Cheryl L. Graha	m, Clerk of Court for Dorchester, South Carol	ina, hereby certify that
RICHARD C MARTIN &	as served as a Petit Juror for Dorchester for 2	days, the week of
10/22/2008.		
He/she was paid \$	10.00 per day, for a total of \$20.00.	
Pickens, SC		
September 19, 2008		
		eryl L. Graham Jerk 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.

rint Checks					-
	cet # DORCHESTER date 7/30/2009 22 sek # 114	Dorchester Test A	ccount		
	Enter Payroll da	te range OR Select P	anels		
	date 0/0/0000 22	Select Panels	Panels	}	Days Served
Juror nu		ter/Select Juro(1) OR Select Mult	iple Jurors by F		One or Multiple Jurors
	OR Print I	Miscellaneous Check		5	
Payee Address	Jeffrey Schattrick		Amount	10.00	Miscellaneous Check
City	[State 2	20 T		

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.



	Click individual lines to		R click this button to s click this button to des	
nclude	Juror name	Status	Panel ID	Panel type
Γ	Dowell, Grover C	Active	AUG 26, 2009	Trial
~	Otto, Peggy A	Active	AUG 26, 2009	Trial
~	Stukes, Brenda R	Active	AUG 26, 2009	Trial
	Walker, Gloria R	Active	AUG 26, 2009	Trial
	Witherspoon, Rosaline M	Active	AUG 26, 2009	Trial

Figure 22.2: Select Jurors Window

3. Close K 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.

Print Che	ecks	***
	Bank acct # 00829184-019988 Bank of South Carolina	
	Check date 9/15/2009 💼	
Begi	inning Check # 12307	
	Enter Payroll date range OR Select Panels	
	Begin date 0/0/0000 Image: Select Panels Panels End date 0/0/0000 Image: Select Panels Panels	
	OR Enter/Select Juror(s)	
		Ê
	(Jurors Are Currently Selected) OR Select Multiple Jurors by Panel	

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.

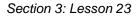
You can print your check verification report as many times as needed before you click the **Check Processing** button. However, once you click the **Check Processing** button, you will not be able to generate the check verification report again.

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.











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.

Bank Account	Details - Ui	ncleared			<u>*</u>	4
Bank acct # 0082918	ank acct # 00829184-019988 Bank of South Carolina Curre			Current	balance	-200.00
Trans Type	Trans#	Date	Description		Amount	Check 🔺
Check	12234	6/11/2008	Blackwood, Valerie H		20.00	Outstan
Check	12235	6/11/2008	Clarkson, Jackie G		20.00	Outstan
Check (2)	12236	6/11/2008	Delis, Lindsey M		20.00	Outstan
Check	12237	6/11/2008	Griffin, Sarah E		20.00	Outstan
Check	12238	6/11/2008	Hare, Michaelene K		20.00	Outstan
Check	12239	6/11/2008	Hartnagle, William D		20.00	Outstan
Check	12240	6/11/2008	Martino, Ricky T		20.00	Outstan
Check	12241	6/11/2008	Smoak, Ann M		20.00	Outstan ≚
Transaction type	Check		Check type Auto	-		
Trans#	12236					
Date	6/11/2008	2				
Amount	20.00	1				
Description	Delis, Lindsey M					
Juror number	22865	Juror Year 20	08 👻			
3 Check Status	Void	Cle	eared dates: Bank 6/11/2008	£ 2	Court 6/11/200	08 😰
Void date	6/11/2008	🗾 Void reason	1			

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 vour changes.



Part II. Reprint the Check

Reprint Checks			5
Bank acct #	00829184-019988	Bank of South Carolina	
Old Begin Check #	12038		
Old End Check #	12038		
New Begin Check #	12234		
New Check date	6/11/2008		

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.

-	Report Preview	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	Format Acrobat Format (PDF) Destination Disk File OK Cancel	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.

Jury Menu for Agency 310	01 - Lee Cou	nty Courtho	use								
File Help											
- Joury Secup	Reconcil	е									√
- Jury Wheel - D Appearance Panel Proc - D Trial Panel Processing	Bank acct # 12	3456789	[Lee Cou	unty Circuit Co	urt	Clear Cheo	ks From # 0	To #	0	
- Payment Processing	c	urrent register	balance	90	033.00		Last reconcil	ed balance	0.00	11/1/20	011
🔄 Financial		Outstandin	a Credits		0.00		+ Clea	red Credits	0.00) Items
- 😭 Bank Account		+ Outstandir		,	967.00		Clev	ared Debits	0.00) Items
- 😭 Combined Account:	_		-		501.00				0.00		, items
Bank Account Det:	Calculated	statement b	alance	100	000.00	=	Statement	balance	0.00	12/31/2	2011
Reconcile				-						, 	
Automatic, Bank Accou	unt Recon						Credits				
Check Register Rej	Trans Type	Trans#	Amount	Clear	Date 🔺		Trans Type	Trans#	Amount	Clear	
Statement Reconci	Check	1000	20.00		1/10/201	11					
🔤 🚰 Bank Account Reg	Check	1001	20.00	Ē	1/10/201						
	Check	1002	20.00	Ē	1/10/201						
	Check	1003	20.00		1/10/201						
	Check	1004	20.00		1/10/201						
	Check	1005	20.00		1/10/201						
	Check	1006	20.00		1/10/201						
	Check	1007	20.00		1/10/201						
	Check	1008	20.00		1/10/201						
	Check	1009	20.00		1/10/201						
	Check	1010	10.00		1/10/201						
	Check	1011	10.00		1/10/201						
	Check	1012	10.00		1/10/201						
	Check	1013	10.00		1/10/201						
	Check	1014	10.00		1/10/201						
	Check	1015	10.00		1/10/201						
BSHOOLBRED	Check Check	1016	10.00		1/10/201						
Lee County Courthouse	I heck	1017	10.00		1/10/2011		•				•
, sources	T		Data E			i i			Dute Internet		mel
Support Help	Trans # 0		Date 0	/U/0000					Date 0/0/00	IUÚ	

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.



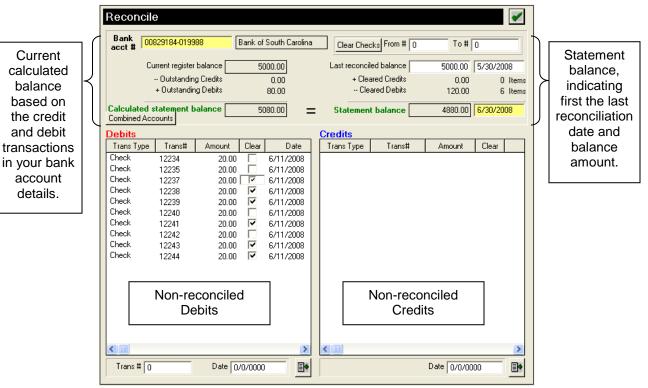


Figure 24.2- Reconcile Screen

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.

Reconc	ile								~
Bank acct #	00829184-0199	88	Bank of	South Carolina	3	Clear Cheo	ks From # 1	2234 To#	12244
	Current register	balance	50	00.00		Last reconcil	ed balance	4900.00	6/30/2008
	Outstandin + Outstandin	-		0.00 100.00			ared Credits ared Debits	0.00 0.00	0 Items 0 Items
Calculated Combined A	l statement b ccounts	alance	51	00.00	=	Statemen	t balance	4900.00	7/31/2008
Debits						Credits			
Trans Typ	e Trans#	Amount	Clear	Date		Trans Type	Trans#	Amount	Clear
Check	12234	20.00		6/11/2008	1				
Check	12235	20.00		6/11/2008					
Check	12240	20.00		6/11/2008					
Check	12242	20.00		6/11/2008					
Check	12244	20.00		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.

Panel				×
♪	Are you sure	you want to cont	inue with Recor	nciliation?
	Yes	No	Cancel]

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.

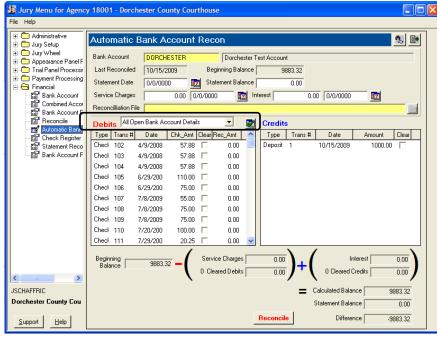


Figure 24.5: Automatic Bank Account Recon Screen

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.

🗓 Jury Menu for Agency 1	18001 - Dorchester County Courthouse	
File Help		
Administrative Jury Setup	Automatic Bank Account Recon	<u>*</u>
Appearance Panel F Trial Panel Processir Payment Processin	Bank Account DORCHESTER Dorchester Test Account Last Reconciled 10/15/2009 Beginning Balance 9883.32 Statement Date 10/15/2009 Statement Balance 10598.06	
Combined Asses	Service Charges 3.25 10/13/2009 1 Interest 1.65 10/14/2009	
📓 Bank Account D	Reconciliation File	
Automatic Bank	Debits All Open Bank Account Details 🔽 🕎 Credits	
😭 Check Register		Clear
	Check 102 4/9/2008 57.88 0.00 Deposit 1 10/15/2009 1000.00 Check 103 4/9/2008 57.88 0.00	
	Check 104 4/9/2008 57.88 0.00	
	Check 105 6/29/200 110.00 🗌 0.00	
	Checł 106 6/29/200 75.00 🗔 0.00	
	Check 107 7/8/2009 55.00 🗌 0.00	
	Checł 108 7/8/2009 75.00 🗖 0.00	
	Checł 109 7/8/2009 75.00 🗌 0.00	
	Check 110 7/20/200 100.00 0.00 Check 111 7/29/200 20.25 0.00	
	Check 111 7/29/200 20.25 0.00 V	
	Balance 9883.32 - 9	1.65
JSCHAFFRIC Dorchester County Cou	Cleared Debits	181.72 198.06
Support <u>H</u> elp		16.34

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.



Open	?	×
Look in:	My Computer 💌 🗢 🖻 📰 🔻	
My Recent Documents	 Local Disk (C:) DVD/CD-RW Drive (D:) U3 System (E:) Scjms\$ on 'cmsfiles' (F:) Removable Disk (J:) sccms\$ on 'cmsfiles' (Q:) Web server (X:) Sccms on 'Sccmssql' (Y:) 	
My Documents		
My Computer	File name: Open Files of type: Cancel Open as read-only Cancel	

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.

Open					? 🛛
Look in: My Recent Documents	Test Data		•	← È ☆ ⊞•	
Desktop My Documents					
My Computer	File name: Files of type:	Testrecon3.bt		•	Open Cancel

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.



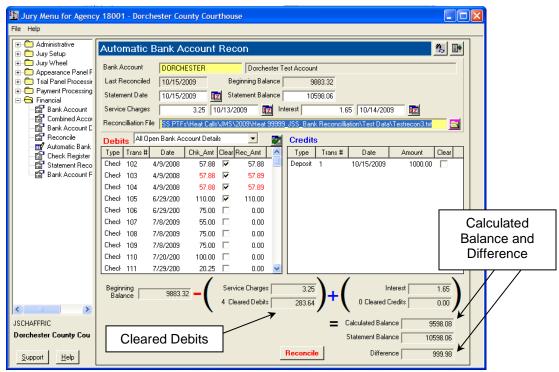


Figure 24.9: Automatic Bank Account Recon Screen

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:

Bank Accou	int Reconci	liation - Autom	atic Mode			<u>*,</u> [•
Bank Account	123456789	Lee Coun	ty Circuit Court			
Last Reconciled	11/1/2011	Beginning Balanc	e 0.0	00		
Statement Date	12/5/2012	Statement Balance	e 450.0	0		
Service Charges	0.00	0/0/0000	Interest	0.00 0/0/000	0 😰	
ReconcilliationFile						
	Bank Account De		Credits			
All Open	with Reconciliation Bank Account De ned Recon File Rec	ails 🚽 🗋	Type Tra	ns# Date	Amount	Clear

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.

Jury Menu for Agenc File Help	y 18001 - Dorchester County Courthouse
Administrative Jury Setup	Automatic Bank Account Recon 🐁 🗈
⊕	Bank Account DORCHESTER Dorchester Test Account
🛨 🧰 Trial Panel Processir	Last Reconciled 10/15/2009 Beginning Balance 9883.32
Payment Processing Financial	Statement Date 10/15/2009 😰 Statement Balance 10598.06
Bank Account	Service Charges 3.25 10/13/2009 12 Interest 1.65 10/14/2009
Combined Accou	Reconciliation File SS PTFs\Heat Calls\JMS\2009\Heat 99999_JSS_Bank Reconciliation\Test Data\Testrecon3.txt
Reconcile	Debits All Open Bank Account Details 💽 Credits
Automatic Bank	Type Trans # Date Chk_Amt Clear Rec_Amt 🔼 Type Trans # Date Amount Clear
😭 Statement Reco	Checł 102 4/9/2008 57.88 🗹 57.88 📃 Deposit 1 10/15/2009 1000.00 🛒
🖓 🖓 Bank Account F	Check 103 4/9/2008 57.88 🔽 57.89
	Checł 104 4/9/2008 57.88 🗹 57.89
	Checł 105 6/29/200 110.00 🗹 110.00
	Checł 106 6/29/200 75.00 🗖 0.00
	Checł 107 7/8/2009 55.00 🔲 0.00
	Checł 108 7/8/2009 75.00 🗌 0.00
	Check 109 7/8/2009 75.00 🔲 0.00
	Checł 110 7/20/200 100.00 🗖 0.00
	Check 111 7/29/200 20.25 🗖 0.00 🔽
	Beginning
JSCHAFFRIC	Calculated Balance 10598.08
Dorchester County Cou	Statement Balance 10598.06
<u>Support</u> <u>H</u> elp	Reconcile Difference -0.02

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

🖹 Jury Menu for Agency 18001 - Dorchester County Courthouse												
File Help												
Administrative Jury Setup	tomatic E	3ank Ac	count	Rec	on						ñ, 📭	
Appearance Panel F Trial Panel Processir Las	nk Account st Reconciled itement Date	DORCHE 10/15/20 10/15/20	009	. '	Dorche: ginning Bala tement Bala	nce [t 383.32 598.06				
Combined Asses	vice Charges concilliation File	SS PTFs)/13/2 JMS\2	<u></u>	9	erest		55 10/14/20 ation\Test Dat	09 🗾 💼 a\Testrecon3.b	at 🔄	
Reconcile De	bits All Ope	en Bank Acc	ount Detail:	s	•	2	Credits	3				
	pe Trans#		Chk_Amt		Rec_Amt	^	Туре	Trans #	Date	Amount	Clear	
		4/9/2008 4/9/2008	57.88 57.88	ব	57.88 57.89		Deposit	1	10/15/2009	1000.0		
		4/9/2008 6/29/200	57.88 110.00	<u>।</u>	57.89 110.00							
Che	ecł 106 - 6	6/29/200	75.00		0.00							
Che	ecł 107 – 7	7/8/2009	55.00		0.00							
		7/8/2009	75.00		0.00							
		7/8/2009	75.00		0.00							
		7/20/200	100.00		0.00							
Be	ginning Balance	7/29/200 9883.32	20.25		0.00 ce Charges ared Debits		3.25)+(1 Cleared	Interest	1.65	
			(,		/ ``	`	,		
JSCHAFFRIC								_	Calculated Bala		0598.08	
Dorchester County Cou						-			Statement Bala	ance 1	0598.06	
<u>S</u> upport <u>H</u> elp							Reconcil	e	Differe	ence	-0.02	

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.

JURYME	enu 🔀
1	There is currently a reconciliation difference of \$-0.02. If you comntinue with the reconcilation, an adjustment transaction will be created for the difference in order to balance the account. Do you wish to continue?
	Yes No Cancel

Figure 24.13: Message Prompt for Different Balances

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

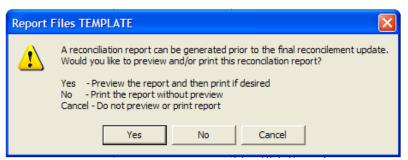


Figure 24.14: Message Prompt

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.

				Sorted by:	Transaction Type and I	Date Cleared
Check #	Cleared D	ate	Amount			
Debit Adjustmen						
	11/03/2009		\$1.82			
Total Debit Adju	stments:	1	\$1.82			
Bank Charges:						
-	10/30/2009		\$3.29			
Total Bank Char	ges:	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			
			RECONCILIATIO	NEUMMADY		
			RECONCILIATIO	N SUMMART		
Beginning	ere 202.00 - 1	Service Charge	es: \$3.29 : \$209.00 + (Inte	rest: \$2.11 ared Credits: \$0.00	Calc. Balance:	\$14,992.83
Balance	\$15,203.00 -	Cleared Debits	: \$209.00 + Cler	ared Credits: \$0.00	Statement Balance:	\$14,992.8.
		•		/	Difference (Adj):	\$14,991.00

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

The report shown was generated from a different reconcilement 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:



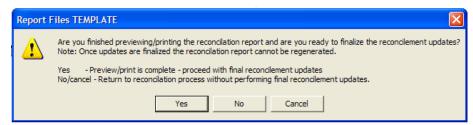


Figure 24.16: Message Prompt After Report Generation, Preview, Print

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 reconcilement, 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.

😰 Jury Menu for Agency 18001 - Dorchester County Courthouse							
File Help							
i i i i i i i i i i i i i i i i i i i	1						
Image: Constraint of the state of							
Principal Account Service Charges 0.00 0/0/0000 1 Interest 0.00 0/0/0000 1							
Bank Account C Debits All Open Bank Account Details Credits Credits							
Bank Account F Check 106 6/29/200 75.00 □ 0.00	Clear						
Check 108 7/8/2009 75:00 0.00 Check 109 7/8/2009 75:00 0.00							
Check 110 7/20/200 100.00 0 0.00 Check 111 7/29/200 20.25 0.00							
Check 112 7/29/200 10.00 0 0.00 Check 113 7/29/200 10.00 0 0.00							
Check 114 7/30/200 10.00 □ 0.00 Check 115 10/27/20 29.00 □ 0.00							
Balance 10598.06 -	0.00						
JSCHAFFRIC Calculated Balance 1059 Dorchester County Cou Statement Balance	98.06 0.00						
Support Help Difference -1059	18.06						

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.

	y 18001 - Dorchester County Courthouse	
File Help		
Administrative Jury Setup	Automatic Bank Account Recon	
	Bank Account DOBCHESTER Dorchester Test Account	
🗉 💼 Appearance Panel F		Toggle Auto reconcile (Input File)/Manual Reconcile (Statement Only)
Trial Panel Processir Payment Processing	Last Reconciled 10/15/2009 Beginning Balance 10598.06	
🖃 🚭 Financial	Statement Date 0/0/0000 12 Statement Balance 0.00	
- 😭 Bank Account	Service Charges 0.00 0/0/0000 12 Interest 0.00 0/0/0000 12	
- 😭 Combined Acco - 😭 Bank Acg ount B	Reconciliation File	
🖀 Reconcile	Debits All Open Bank Account Details 🔽 😰 Credits	
	Type Trans# Date Chk_Amt Clear A Type Trans# Date Amou	int Clear
Statement Reco		25.50
📲 Bank Account F	Check 107 7/8/2009 55.00 🗖	
	Check 108 7/8/2009 75.00 🗆	
	Check 109 7/8/2009 75.00 🗆	
	Check 110 7/20/2009 100.00 🗖	
	Check 111 7/29/2009 20.25	
	Check 112 7/29/2009 10.00	
	Check 113 7/29/2009 10.00	
	Check 114 7/30/2009 10.00	
	Check 115 10/27/2009 29.00	
	Beginning Service Charges Interest	0.00
	Balance 10598.06 - 0 Cleared Debits 0.00 + 0 Cleared Credits	0.00
< >		0.00
JSCHAFFRIC	Calculated Balance	10598.06
Dorchester County Cou	Statement Balance	0.00
Support Help	Reconcile Difference	-10598.06

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.

🗓 Jury Menu for Agency 18001 - Dorchester County Courthouse							
File Help							
	Automatic Bank Account Recon	ñ, 💽					
Dury Wheel Dury Wheel D Appearance Panel F D Trial Panel Processin Pavment Processin	Last Reconciled 10/15/2009 Beginning Balance 10598.06						
Financial Bank Account Combined Account Bank Account Bank Account							
📲 Reconcile	Debits All Open Bank Account Details						
Automatic Bank	Type Trans # Date Chk_Amt Clear Clear/Undear Selected Checks	Clear					
- 😭 Statement Reco	Check 106 6/29/2009 75.00 🗌 🔄 Deposit 2 10/28/2009 1125.50						
🔤 🖓 Bank Account F	Check 107 7/8/2009 55.00 🗔						
	Check 108 7/8/2009 75.00 🗖						
	Check 109 7/8/2009 75.00 🗖						
	Check 110 7/20/2009 100.00 🗔						
	Check 111 7/29/2009 20.25 🗔						
	Check 112 7/29/2009 10.00 🗔						
	Check 113 7/29/2009 10.00 🗖						
	Check 114 7/30/2009 10.00						
	Check 115 10/27/2009 29.00 🗔 💌						
	Beginning 10598.06 - Service Charges 0.00 + Interest Balance 10598.06 - Service Charges 0.00 + Content of Cleared Credits	0.00					
JSCHAFFRIC	Calculated Balance 11	0598.06					
Dorchester County Cou	Statement Balance	0.00					
Support Help	Reconcile Difference -1	0598.06					

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.

🛄 Jury Menu for Agenc File Help	y 18001 -	Dorche	ster County (Courthouse)						
 ⊕ C Administrative ⊕ C Jury Setup 	Autom	atic B	ank Accou	int Reco	on						<u>*.</u>
Jury Wheel Appearance Panel F	Bank Acc	count	DORCHESTER		Dorch	ester Tr	est Accoun	t			
🗄 🫅 Trial Panel Processir	Last Rec	onciled	10/15/2009	Beg	nning Ba	lance [105	598.06			
Payment Processing Financial	Statemer	nt Date	10/28/2009	State	ement Ba	lance		0.00			
- 😭 Bank Account	Service (Charges	0.00	0/0/0000		Int	erest	0.0	0/0/0000	E 2	
- 😭 Combined Accou	Reconcill	iation File									
😭 Reconcile	Debits	All Oper	n Bank Account [) etails	-		Credits	;			
🛒 Automatic Bank 🎬 Check Register	Туре	Trans #	Date	Chk_Amt	Clear	^	Туре	Trans #	Date	Amount	Clear
Statement Reco	Check	106	6/29/2009	75.0	~		Deposit	2	10/28/2009	1125.50	
🖓 Bank Account F	Check	107	7/8/2009	55.0	•						
	Check	108	7/8/2009	75.0	•						
	Check	109	7/8/2009	75.0	•						
	Check	110	7/20/2009	100.0	✓						
	Check	111	7/29/2009	20.2	✓						
	Check	112	7/29/2009	10.0	•						
	Check	113	7/29/2009	10.0	•						
	Check	114	7/30/2009	10.0							
	Check	115	10/27/2009	29.00		~					
	Beginnir Balanc		10598.06 —		e Charge red Debi	_	0.00) +(0 Cleared	nterest	0.00
< ··· >					_	,				,	
JSCHAFFRIC								=	Calculated Bala	ance 10	177.81
Dorchester County Cou									Statement Bala	ance	0.00
Support Help							Reconcil	e	Differe	ence -10	177.81

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 reconcilement 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	a 9 b c
Restricted by Select date range Which period to report? Length of report period	
Starting Check # Ending Check # Check Status	* 0 * 0
Sorted By	*Blank • Check Nbr
	C 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 F	rom: 6/1/2008 Thru	6/30/2008	Sorted by: Check Nbr.			
	CHE	СК					
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 PR	INTED: 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.

Statement Reconciliatio	n RPT 🖉 🦉 📳
Bank acct # 00829184-019988	Dorchester County Courthouse
	cted bank account's Current Balance, then adjust for all then show a "calculated" statement balance that you should nt ending balance.

Figure 26.1: Statement Reconciliation RPT Screen

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

This report displays details for Statement reconcilitation for a given account							
ered 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 state	ement balance		\$5,100.00				

Figure 26.2: Printed Statement Reconciliation Report



Step 2. Print the Bank Account Register Report

1. Select Bank Account Register from the Financial folder.

Bank Accou	ınt Register		5	오 🖲 🖬 🛸
Restricted By				
Bank acct #	00829184-019988	Dorchester County Courthou	se	
Which p	ion Date Range period to report? User Defined of report period User Defined		1	

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.

	This report displays details on the transactions for a given Bank Account over a period of time								
Itered by: Acct #: 0082	29184-019988 Ban DATE	k of So	uth Carolina DESCRIPTION	Trans Date From: 06/01/2008	Thru 06/30/2008	Sorted by: Trans Date			
Debits									
12237	6/11/2008	с	Griffin, Sarah E	6/30/2008	20.00	Cleared			
12238	6/11/2008	С	Hare, Michaelene K	6/30/2008	20.00	Cleared			
12239	6/11/2008	С	Hartnagle, William D	6/30/2008	20.00	Cleared			
12241	6/11/2008	С	Smoak, Ann M	6/30/2008	20.00	Cleared			
12243	6/11/2008	С	Wood, Randall S	6/30/2008	20.00	Cleared			
					100.00				
12234	6/11/2008	с	Blackwood, Valerie H	1/1/1	20.00	Outstanding			
12235	6/11/2008	С	Clarkson, Jackie G	1/1/1	20.00	Outstanding			
12240	6/11/2008	С	Martino, Ricky T	1/1/1	20.00	Outstanding			
12242	6/11/2008	С	Sweat, Laura M	1/1/1	20.00	Outstanding			
12244	6/11/2008	С	Delis, Lindsev M	1/1/1	20.00	Outstanding			
					100.00				
12236	6/11/2008	с	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

Appearance -	- Non-Finali	zed 🛛 🐁 🔂 🏧 🌠	1 🖻 🙆 🖻 📇	🐱 🛃 🗅	X 🔹
Panel ID	Panel type	Description	Term of service	Date prenort	Time to 🗖
NOV 10, 2008	Appearance	NOV 10, 2008	1 WEEK	11/10/2006	o.ou 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
OCT 13, 2008	Appearance	OCT 13, 2008	1 WEEK	10/13/2008	8:00 am
OCT 20, 2008	Appearance	OCT 20, 2008	3 DAYS	10/20/2008	8:00 am
OCT 27, 2008	Appearance	OCT 27, 2008	1 WEEK	10/27/2008	8:00 am
OCT 6, 2008	Appearance	OCT 6, 2008	1 WEEK	10/6/2008	12:00 ai
SEPT 15, 2008	Appearance	SEPT 15, 2008	1 WEEK	9/15/2008	8:00 am
SEPT 22, 2008	Appearance	SEPT 22, 2008	3 DAYS	9/22/2008	8:00 am
SEPT 29, 2008	Appearance	SEPT 29, 2008	1 WEEK	9/29/2008	8:00 am
()					>
Panel ID SEPT 15, 2008					
Р	anel type App	pearance 🗾			
De	escription SE	PT 15, 2008			
Termo	of service 1 v	VEEK			
Report D	ate/Time 9/1	15/2008 😰 8:00 am	Location CTR		
Numbe	r of jurors 150) # Active 141	#Available 141		
	Jury type P.		Trial type Pul	ll jurors from [2008 💌
		Finalized Date 10/10/2005	Panel Floor		

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

Trial Panel - No	on-Finalized	-	2 🔁	🖉 🖻 🐼	II 🖨 🖉	1 💀 🗹 🗅	i 🗙 🛸
Panel ID	Panel type	D	escription	ד	erm of service	Data Sara	
2007CP4200001	Trial	2007CP42000	01	1 weel	k	3/172008	i <mark>rrent record</mark> 12:00
2007CP4200002	Trial	2007CP42000	02	1 weel	k	3/1/2008	12:00
<							>
		•					
I							
Panel ID	2007CP420000	12	Panel type	Trial	-		
Description	2007CP420000	12					
Term of service	1 week		Repor	t Date/Time	3/1/2008	😰 12:00 am	_
Location	CTR						
Number of jurors	10	# Active 0		# Available	0		
Jury type	SGJ	Judge		Trial type			
Trial From	3/1/2008	🕎 To 3/	1/2008	⁶ 2			
	Finalized	Date 3/	18/2008	Panel Floor			
1							
Last Update:							

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 v 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.

🚮 🖻 🗲 🗅 🗙 😒
Acct ID 1
2Dorchester County Courthouse

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 **I**, and the Select Court Agencies window opens.

Ī	🕒 Edit (JM	l4wkF]								
	Select	Court Agen	cies for Combined Account							
	Combined Acct ID 2 Greenwood County Courthouse									
	Click	c individual lin	es to select/deselect OR click this button to select all —> 🛒							
			OR click this button to deselect all —> 📉							
	Include	Court Agency	Description							
		18001	2Dorchester County Courthouse							
		18002	Dorchester Court Agency II							
	1		4							
l										

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.



combined.	Acct ID 3	s to Combine	
Clic	< indivídual li	-	ct OR click this button to select all —> 🚆 OR click this button to deselect all —> 🚆
Include	Court Agency	Bank acct #	Bank acct desc
	18001	00829184-019988	Bank of South Carolina
	18001	12334	Palmetto Bank
v	18002	12344	Dorchester Court Agency II

Figure 28.3: Select Bank Accts to Combine Screen

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

Combined Accounts Defi	nition		4 6 5	E × \$
ID Combined Account Description 3 Dorchester County	Combined Acct II Description	Dorchester County		

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

Combined Accounts Defi	nition	🖷 🏚 🕏 👌 🗅 🗙 🕸
ID Combined Account Description 3 Dorchester County	Combined Acct ID 3 Description Dorchester County	

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.

💷 Display	Combined Acct Bala	nces [JM4xcF]						×
2D orches	er County Courthou	ise						<u>.</u>
Court Agency	Bank Account	Description	Current Balance	Last Rec Balance		ast Recon Date	Next Check Number	
18001	00829184-019988	Bank of South Carolina	738	33.00 4	550.00 8/3	31/2008	12307	
18001	12334	Palmetto Bank	487	0.00 4	960.00 4/3	30/2008	24	
•					7			٩
Combined	Account Totals:	Current Balance 12253.00	Last Recon Balance	9510.00				
Clear Che	cks: From # 0	Through # 0	Clear Date 0/0/00	000	_			

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

💷 Display	Combined Acct Bala	nces [JM4xcF]				(
2D orchest	ter County Courthou	se					2
Court Agency	Bank Account	Description	Current Balance	Last Recon Balance	Last Recon Date	Next Check Number	\vdash
18001	00829184-019988	Bank of South Carolina	7383.00	4550.00	8/31/2008	12307	
18001	12334	Palmetto Bank	4870.00	4960.00	4/30/2008	24	_
-							+
Combined	Account Totals:	Current Balance 12253.00	Last Recon Balance	9510.00			
Clear Che	cks: From # 0	Through # 0	Clear Date 0/0/0000				

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.

Edit Details by	Account [JM2cfF]				\frown	23
Bank Acco	unt Details -	Uncleared			🐴 🖌 🗅	X 💈
Bank acct # 10	048033811	Midland Va	alley Summary Court	Curren	t balance	-5421.71
Trans Type	Trans#	Date	Description		Amount	Check 🔺
Check	26551	4/3/2009	Abney, Michael D		30.10	Outstan
Check	26552	4/3/2009	Anderson, William D		13.03	Outstan
Check	26553	4/3/2009	Ard, Larry		15.05	Outstan
Check	26554	4/3/2009	Atkinson, Patrick D		28.08	Outstan
Check	26555	4/3/2009	Beard, Kimberly C		11.52	Outstan
Check	26556	4/3/2009	Brown, Charles N		23.04	Outstan
Check	26557	4/3/2009	Burno, Ashley S		30.10	Outstan
Check	26558	4/3/2009	Clemmons Paulette B		17 07	Outstan 👻
•						,
Transaction	type Check		Check type Auto	-		
Tra	ans# 26551					
I	Date 4/3/2009	1 2				
Am	ount 30.	.10				
Desci	ription Abney, Michae	el D			_	
Juror ni	umber 203	Juror Year 20	09 💌			
Check 9	Status Outstanding	↓ Ci	eared dates: Bank 0/0/0000	5 2	Court 0/0/000	D 😰
Void	date 0/0/0000	😰 Void reasor				/
Trans date 🛛				_		
Check Trans# [Last Update:			Search for	r check
, Check Status	 Blank		7		٦	Frans o

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.

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

Note

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









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

File Help						~	
	Appearance -	Non-Finali	zed 🐁 🔝		3 3 8 8		
🗈 🛅 Jury Wheel	Par	nel ID	Panel type	Description	Term of service	Date to report	Time to re
Appearance Panel F Mark Present Ba	FEB11-13		Appearance	FEB11-13	3 days	2/11/2013	9:00 am
Appearance Par	JAN17		Appearance	JAN17	1 Day	1/17/2013	9:00 am
Jurors Present R	MAR19-21		Appearance	MAR19-21	3 Days	3/19/2013	12:00 am
Mark Present Al Trial Panel Processir D-D Payment Processing D-D Financial	MAR5-7		Appearance	MAR5-7	3 days	3/5/2013	9:00 am

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

ïle Help							
⊞ C Administrative ⊕ - C Jury Setup	Appe	arance - Non-Final	ized 🐁 🗟	🔁 🖄 💇 🛅	2 🗉 🥌 📇	💀 🖌 🗅	X
🗄 🧰 Jury Wheel		Panel ID	Panel type	Description	Term of service	Date to report	Time to re
Appearance Panel F Appearance Panel F Appearance Panel F		FEB11-13	Appearance	FEB11-13	3 days	2/11/2013	9:00 am
Appearance Par		JAN17	Appearance	JAN17	1 Day	1/17/2013	9:00 am
Jurors Present R		MAR19-21	Appearance	MAR19-21	3 Days	3/19/2013	12:00 am
Hark Present Alt Trial Panel Processir Payment Processing Financial		MAR5-7	Appearance	MAR5-7	3 days	3/5/2013	9:00 am

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.



Select Jury type [JMo1F] -		×
Select Jury Type		<
Description	Jury type code	Active
Grand Jury	GJ	•
Magistrate Jury	MJ	•
Petit Jury	PJ	•
State Grand Jury	SGJ	V

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.

b Jury Menu for Agency 31 File Help	1001 - Lee County Courthouse	
Administrative	Appearance - Non-Finalized Image: Second Secon	Image: Second
	MMR 13-21 Appearance MAR5-7 MAR5-7 Appearance MAR5-7 STG2014 Appearance STG2014	3 Days 3/13/2013 12:00 am 3 days 3/5/2013 9:00 am 1 YEAR 3/11/2013 9:00 am
	Panel ID STG2014 Panel type Appearance Description STG2014 Term of service TYEAR	· · · ·
Image: second	Number of jurors 150 # Active 0 # A Jury type GGJ Judge 1	Available 0 Trial type Pull jurors from 2013 V Panel Floor

Figure 30.4: New Appearance Panel

Step 3. Pull Jurors

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

RandomSelect [JMh5F]	8
Random Select Jurors	
Panel ID GJ2014	Jurors Available 155
Description GJ2014	
Juror Master Year	2013 💌
Total Jurors Required for this Panel	150
Number of Active Jurors	0
Number of Jurors Needed	150
Number of Jurors to Select	150

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.

I Appearance Panel Re	eports Prompt [J	M4rsF]
	Report Option	Election commission report t
	From date Through date	0/0/0000 0/0/0000 2
	3rd Party Mai	ler PDF file name

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.

StateGrandJuryWhee	I [JM5bwF]	×
Court agency code	31001	
Panel type	Appearance	
Panel ID	GJ2014	
Description	GJ2014	
Juror Master Year	2013	
(Create Jury Wheel File Close	

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.

Send

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