DEADLINE RULES

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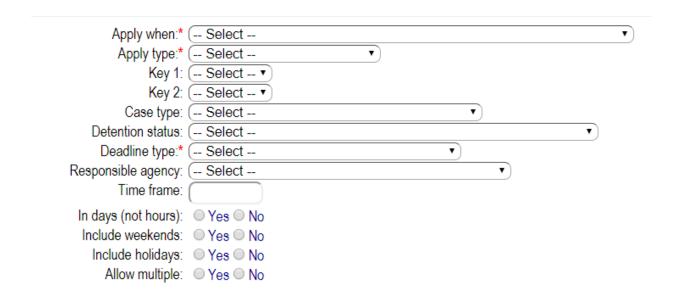
Contents

Introduction:

Deadlines are very helpful "reminders" for you to do something by a specific date. Read more about Deadlines

We can establish Rules to automatically add deadlines based on things that happen in the case. Every rule has the same options.

- Apply when – allows you to choose when you want this rule to be executed.

- Apply type – has you choose between completing an existing rule or adding a new rule.

- Key 1 – Lists specific choices based on your selected "apply when" option. If you choose when a recommendation is added, key 1 will list the recommendations. If you choose when a requirement is added, key 1 will list the requirement types.

- Key 2 – Lists specific choices based on your selected "apply when" option. For example, if you chose "when a requirement is added", key 1 lists the requirement type, key 2 lists the requirement codes.

- Case type – Lists the different case types and allows you to execute this rule for a specific case type. If you want this rule on multiple case types, you must add the rule again and select a different case type. You can click the NEW button to copy rules.

- Detention status – Allows you to pick a detention status to execute this rule. Choices are Currently in a secure detention location, Currently in a non-secure detention location, Currently in either a secure or a a non-secure detention location, or not currently in detention.

- Deadline type – Choose the appropriate deadline that has been set up in the Table: Deadline Types (DEADLINETYPE)

- Responsible Agency – Select the agency who is responsible for this task. The deadline will appear on their Deadline section of the Case Detail screen.

- Time frame – This is the number of days or hours that this deadline will be due. You can enter 60, which would indicate 60 days or hours from the current date or -12 which would indicate 12 days or hours from the key 1, such as when an event is the "apply when" option.

- In days (not hours) – This is where you indicate if the time frame is in days or in hours.

- Include weekends – If you say 60 days, should weekends count toward the 60 days? See When a stay reason for a case is added for an example.

- Include holidays – Should holidays count toward the time frame?

- Allow multiple – Can there be multiple deadlines of the same type? This does not mean open at the same time. If you are going to use the same deadline again later in the case multiple must be yes.

Note: Deadlines do the complete first then the add. So if you had a rule that said "when a Foster Care Review Board event is completed end the Foster Care Review Board deadline" and you also had a rule that said "when a Foster Care Review Board event is completed add a Foster Care Review Board deadline out 180 days" it will close the existing deadline before adding the new one. Make sure this type of deadline allows multiple yes.

When a state decision is added to a case name (CASENAMES)

This could be helpful when the state

Add a new rule

In this example, when the state's decision is "Petition – DCS FILED PETITION" in a CHINS case, a "Permanency Hearing Due" deadline is added with a due date out 365 days. It appears on Marion County Juvenile Court's deadline list.

```
        Apply when: When a state decision is added to a case name
        Apply type: Add a new rule
             Key 1: Petition - DCS FILED PETITION
             Key 2:
         Case type: Juvenile CHINS
   Detention status:
      Deadline type: Permanency Hearing Due
  Responsible agency: MCJC - Marion County Juvenile Court
        Time frame: 365
  In days (not hours): ◉ Yes ○ No
    Include weekends: ◉ Yes ○ No
     Include holidays: ○ Yes ◉ No
      Allow multiple: ◉ Yes ○ No
```

Complete an Existing Rule

The rule will be completed as of the state's decision date.

```
        Apply when: When a state decision is added to a case name
        Apply type: Complete an existing rule
             Key 1:
             Key 2:
         Case type:
   Detention status:
      Deadline type: Case must be filed
  Responsible agency: -- Select --
        Time frame: 0
  In days (not hours): ○ Yes ◉ No
    Include weekends: ○ Yes ◉ No
     Include holidays: ○ Yes ◉ No
      Allow multiple: ○ Yes ◉ No
```

When a case name is added (CASENAMESADD)

When a recommendation is added to a case name (CASENAMESREC)

When a case is added (CASES)

When a case is added, you may need to do certain steps. In this example, when a delinquency case is added, a deadline called "Assign YSO" is added due in 1 hour. This allows the supervisor to pull a list of all the new cases where a YSO (Youth Services Officer) has not been assigned yet.

Add a new rule

Apply when:	When a case is added
Apply type:	Add a new rule
Key 1:	
Key 2:	
Case type:	Juvenile Delinquency
Detention status:	
Deadline type:	Assign YSO
Responsible agency:	WCJC - Williamson County Juvenile Court
Time frame:	1
In days (not hours):	○ Yes ● No
Include weekends:	● Yes ○ No
Include holidays:	● Yes ○ No
Allow multiple:	○ Yes ● No

When a case status is added (CASESTATUS)

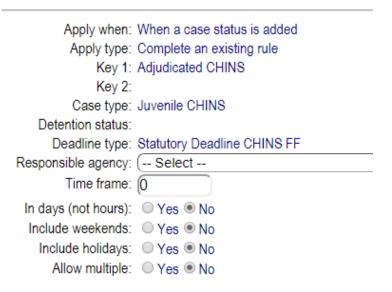You can add or complete a deadline based on a specific case status being added.

Add a new rule

In this example, when a case status of "Referral Received" is added it adds a deadline that says "Client must be contacted" with a due date 6 days, including weekends and holidays.

```
Apply when:*    CASESTATUS - When a case status is added
Apply type:*    1 - Add a new rule
     Key 1:     OPEN - Referral Received
     Key 2:     -- Select --
  Case type:    -- Select --
Detention status:  -- Select --
Deadline type:*    CLIC - Client must be contacted
Responsible agency:  MDTC - Miami-Dade County Teen Court
  Time frame:   6
In days (not hours):  ● Yes  ○ No
Include weekends:     ● Yes  ○ No
Include holidays:     ● Yes  ○ No
Allow multiple:       ○ Yes  ● No
```

Complete an existing rule

When a case status is added, it can also complete an existing deadline. In this example, when a case status of "Adjudicated CHINS" is added, it puts an "completed" date on the "Statutory Deadline CHINS FF" deadline because once the child has been adjudicated, we have met the Factfinding timeline.

```
Apply when:    When a case status is added
Apply type:    Complete an existing rule
     Key 1:    Adjudicated CHINS
     Key 2:
  Case type:   Juvenile CHINS
Detention status:
Deadline type: Statutory Deadline CHINS FF
Responsible agency:  -- Select --
  Time frame:  0
In days (not hours):  ○ Yes  ● No
Include weekends:     ○ Yes  ● No
Include holidays:     ○ Yes  ● No
Allow multiple:       ○ Yes  ● No
```

When FF DeadLN is used in a document (DOCUMENTNAMES)

You can add a variable in a template, for example @v/end-dead/ and it will look for a matching deadline rule then execute the rule. In this example, the template JD Order Setting Compliance Hearing (Batch), when created will add a deadline that says "Parent Financial Contract Due" in 10 days.

Add a new rule

Deadline is added with the current date/time

Apply when: When FF DeadLN is used in a document
Apply type: Add a new rule
Key 1: JD Order Setting Compliance Hearing (Batch)
Key 2:
Case type:
Detention status:
Deadline type: Parent Financial Contact Due (Compliance Set)
Responsible agency: PCJP - Porter County Juvenile Probation
Time frame: 10
In days (not hours): ● Yes ○ No
Include weekends: ○ Yes ● No
Include holidays: ○ Yes ● No
Allow multiple: ○ Yes ● No

Variables				
Name	Type	Action	Length	Prompt
END-DEAD	@V/	FF DEADLN/00	1	x

Complete an existing rule

When a document is created and a variable @v/end-dead/ for example is found, it can also complete an existing deadline. In this example, when the template "JD Case Plan" is finished, it will complete the deadline "Case Plan Due."

Completed date is the current date/time.

Apply when: When FF DeadLN is used in a document
Apply type: Complete an existing rule
Key 1: JD Case Plan
Key 2:
Case type:
Detention status:
Deadline type: Case Plan Due
Responsible agency: -- Select --
Time frame: 0
In days (not hours): ○ Yes ● No
Include weekends: ○ Yes ● No
Include holidays: ○ Yes ● No
Allow multiple: ○ Yes ● No

When an event is name is added (EVENTNAMES)

When an event name is added, you can add a deadline to remind you to do something. For example, when a Factfinding event is added in a Termination case, this reminds DCS that 21 days BEFORE (-21) the factfinding hearing they must prepare and file subpoenas.

Add a new rule

Apply when: When an event name is added
Apply type: Add a new rule
Key 1: Factfinding
Key 2:
Case type: Termination of Parental Rights
Detention status:
Deadline type: Prepare & File Subpoenas
Responsible agency: DCS - Indiana Department of Child Services ▼
Time frame: -21
In days (not hours): ● Yes ○ No
Include weekends: ● Yes ○ No
Include holidays: ● Yes ○ No
Allow multiple: ○ Yes ● No

Complete an Existing Rule

The completion date will be the event date and time.

Apply when:* EVENTNAMES - When an event name is added
Apply type:* 0 - Complete an existing rule ▼
Key 1: INT - Intake Interview ▼
Key 2: -- Select -- ▼
Case type: -- Select -- ▼
Detention status: -- Select --
Deadline type:* CLIC - Client must be contacted ▼
Responsible agency: -- Select --
Time frame:
In days (not hours): ○ Yes ● No
Include weekends: ○ Yes ● No
Include holidays: ○ Yes ● No
Allow multiple: ○ Yes ● No

When an event is completed successfully (EVENTS)

When an event is completed successfully, which means the event disposition used is not a disposition code that means "cancelled," you can add a deadline.

Add a new rule

In this example, when the Additional Initial and Dispositional hearing is completed successfully, a deadline to remind DCS to check 3 month progress report is added with a due date 90 days from the date of the event.

Apply when: When an event is completed successfully
Apply type: Add a new rule
Key 1: Additional Initial and Dispositional
Key 2:
Case type: Juvenile CHINS
Detention status:
Deadline type: Check 3 month progress report
Responsible agency: DCS - Indiana Department of Child Services ▼
Time frame: 90
In days (not hours): ● Yes ○ No
Include weekends: ● Yes ○ No
Include holidays: ● Yes ○ No
Allow multiple: ○ Yes ● No

Complete an existing rule

In this example, when a CHINS Dispositional Hearing event in a Juvenile CHINS case is completed successfully, the Deadline "Statutory Deadline Disposition" is completed.

Apply when: When an event is completed successfully
Apply type: Complete an existing rule
Key 1: CHINS Disposition Hearing
Key 2:
Case type: Juvenile CHINS
Detention status:
Deadline type: Statutory Deadline Disposition
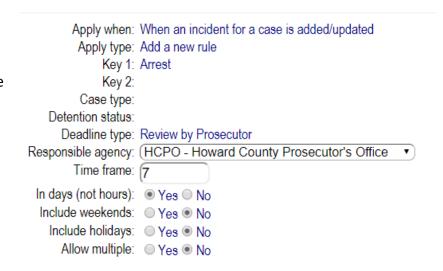Responsible agency: -- Select --
Time frame: 0
In days (not hours): ○ Yes ● No
Include weekends: ○ Yes ● No
Include holidays: ○ Yes ● No
Allow multiple: ○ Yes ● No

When an incident for a case is added/updated (INCIDENTS)

When an incident is added or updated, you can add or complete a deadline.

Add a new rule

In this example, when an incident type of "arrest" is added, a deadline that says "Review by Prosecutor" is due in 7 days. This will appear on the Howard County Prosecutor's Office.

Apply when: When an incident for a case is added/updated
Apply type: Add a new rule
Key 1: Arrest
Key 2:
Case type:
Detention status:
Deadline type: Review by Prosecutor
Responsible agency: HCPO - Howard County Prosecutor's Office ▼
Time frame: 7

In days (not hours): ◉ Yes ○ No
Include weekends: ○ Yes ◉ No
Include holidays: ○ Yes ◉ No
Allow multiple: ○ Yes ◉ No

The completion date is the incident date/time.

When a requirement for a case is added (REQUIREMENTCASE)

When a specific requirement is added to the case, you can add a deadline to remind you to do something.

Add a new rule

Apply when: When a requirement for a case is added
Apply type: Add a new rule
Key 1: PROBATION
Key 2: INFORMAL ADJUSTMENT - ADMINISTRATIVE
Case type:
Detention status:
Deadline type: Check Case Status
Responsible agency: JC - Allen County Juvenile Center
Time frame: 30
In days (not hours): ● Yes ○ No
Include weekends: ● Yes ○ No
Include holidays: ● Yes ○ No
Allow multiple: ● Yes ○ No

When a requirement for a case is completed (REQUIREMENTS)

Once a requirement gets a requirement status that is considered "closed" it can trigger a deadline rule. In this example, it is being used to complete an existing rule. Key 1 is the Requirement Type, Key 2 is the Requirement Code. So when an informal adjustment requirement is closed, it completes the deadline called "Informal Adjustment Completion Deadline."

When a deadline is added, it will be added as of the requirement start date.

Complete an existing rule

Completion date will be the requirement status date

Apply when: When a requirement for a case is completed
Apply type: Complete an existing rule
Key 1: Special services (Ward of CT or DFC)
Key 2: Informal Adjustment
Case type:
Detention status:
Deadline type: Informal Adjustment Completion Deadline
Responsible agency: -- Select --
Time frame: 0
In days (not hours): ○ Yes ● No
Include weekends: ○ Yes ● No
Include holidays: ○ Yes ● No
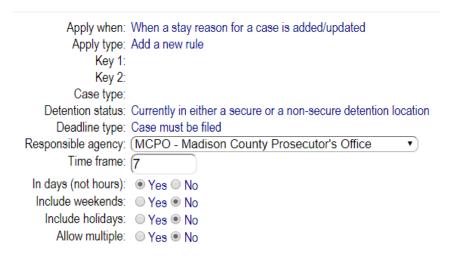Allow multiple: ○ Yes ● No

When a stay reason for a case is added/updated (STAYREASONS)

When a facility stay reason for a case is added or updated, you can add a deadline or complete a deadline.

Add a new rule

In this example, when the detention status is "currently in either a secure or a non-secure detention location" it will add a deadline called "Case must be filed" due in 7 days. It appears on the Madison County Prosecutor's Office deadline list.

Deadline will be added as of the reason start date.

Apply when: When a stay reason for a case is added/updated
Apply type: Add a new rule
Key 1:
Key 2:
Case type:
Detention status: Currently in either a secure or a non-secure detention location
Deadline type: Case must be filed
Responsible agency: MCPO - Madison County Prosecutor's Office ▼
Time frame: 7
In days (not hours): ● Yes ○ No
Include weekends: ○ Yes ● No
Include holidays: ○ Yes ● No
Allow multiple: ○ Yes ● No

Complete an existing rule

In this example, when the detention status is not currently in detention, the deadline type "Petition must be filed" is completed.

Deadline will be completed as of the reason end date.

Apply when: When a stay reason for a case is added/updated
Apply type: Complete an existing rule
Key 1:
Key 2:
Case type:
Detention status: Not currenlty in detention
Deadline type: Petition must be filed
Responsible agency: -- Select --
Time frame: 0
In days (not hours): ○ Yes ● No
Include weekends: ○ Yes ● No
Include holidays: ○ Yes ● No
Allow multiple: ○ Yes ● No