

# REQUIREMENTS:

This area lets you know everything a person must complete in order to close their case.

## FROM THE MENU: Case, Requirements



**List Requirements**  
Joslyn Alshelvia Campbell (File# 46)

Case: [ 2 - Respondent - 53C07-1306-JD-000015 (Active; Probation) ]  Show names/cases  Financial view  
 Show details

Assigned date	Requirement type	Start date	Scheduled end	New end	Status	Status date
<b>Add a new requirement</b>						
8/21/2013	Diagnostic & Evaluation Services Mental Health	8/21/2013	5/21/2014		Pending	8/21/2013
8/21/2013	Substance Abuse Program Assessment	8/21/2013	5/21/2014		Pending	8/21/2013
8/21/2013	Volunteer Community Service	8/21/2013	5/21/2014		Pending	8/21/2013
8/21/2013	Employment (Obtain)	8/21/2013	5/21/2014		Pending	8/21/2013
8/21/2013	TASC Classes (GED) provided by Other	8/21/2013	5/21/2014		Pending	8/21/2013
8/21/2013	Victim Offender Restoration Program	8/21/2013	5/21/2014		Pending	8/21/2013
8/21/2013	JUVENILE FORMAL PROBATION	8/21/2013	5/21/2014		Active	8/21/2013
<b>Total amount due for the requirements displayed: \$0.00</b>						

- **Case:** You can choose to view only one particular case or by changing case field to select you can view the requirements on all cases.

- **Show names/cases:** If you select this option, it will show the name and case for each requirement.

Assigned date	Requirement type	Start date	Scheduled end	New end	Status	Status date
<b>Add a new requirement</b>						
10/31/2013	Preliminary Inquiry (Juvenile)	10/31/2013			Completed Suc	10/31/2013
Joslyn Alshelvia Campbell (46; Case: 1; Unassigned)						
8/21/2013	Diagnostic & Evaluation Services Mental Health	8/21/2013	5/21/2014		Pending	8/21/2013
Joslyn Alshelvia Campbell (46; Case: 2; 53C07-1306-JD-000015)						

- **Financial View:** If you select this option, it will narrow the list to only the fee requirements.

**List Requirements**  
Joslyn Alshelvia Campbell (File# 46)

Case: [ -- Select -- ]  Show names/cases  Financial view  
 Show details

Assigned date	Seq	Requirement type	Default payee						Status	Status date
<b>Add a new requirement</b>										
8/1/2013	32.5	CASP Start up Fee	Assess	Payments	Adjustments	Other	Due	Paid	11/22/2013	
			UserFees	\$75.00	(\$75.00)	\$0.00	\$0.00	\$0.00		
8/1/2013	33	CASP Level 2 & 3	Assess	Payments	Adjustments	Other	Due	(Balance: \$195.00)		
			UserFees	\$360.00	(\$165.00)	\$0.00	\$0.00	\$195.00		
			Notes \$25 GPS PAYMENT PENDING							
8/1/2013	34	Juvenile Informal Probation User Fees	Assess	Payments	Adjustments	Other	Due	(Balance: \$90.00)		
			User Fee	\$90.00	\$0.00	\$0.00	\$0.00	\$90.00		
8/1/2013	38	Community Service Fee (RC/PR)	Assess	Payments	Adjustments	Other	Due	(Balance: \$40.00)		
			CommSrvcFee	\$40.00	\$0.00	\$0.00	\$0.00	\$40.00		
<b>Total amount due for the requirements displayed: \$325.00</b>										

- **Show details:** If selected, you will see details, including requirement notes:

**List Requirements**  
Joslyn Alshelvia Campbell (File# 46)

Case: [ -- Select -- ]  Show names/cases  Financial view  
 Show details

Assigned date	Requirement type	Start date	Scheduled end	New end	Status	Status date
<b>Add a new requirement</b>						
10/31/2013	Preliminary Inquiry (Juvenile)	10/31/2013			Completed Suc	10/31/2013
8/21/2013	Diagnostic & Evaluation Services Mental Health	8/21/2013	5/21/2014		Pending	8/21/2013
8/21/2013	Substance Abuse Program Assessment	8/21/2013	5/21/2014		Pending	8/21/2013
8/21/2013	Volunteer Community Service	8/21/2013	5/21/2014		Pending	8/21/2013
Notes [20 hrs]						
8/21/2013	Employment (Obtain)	8/21/2013	5/21/2014		Pending	8/21/2013
8/21/2013	TASC Classes (GED) provided by Other	8/21/2013	5/21/2014		Pending	8/21/2013
8/21/2013	Victim Offender Restoration Program	8/21/2013	5/21/2014		Pending	8/21/2013
8/21/2013	JUVENILE FORMAL PROBATION	8/21/2013	5/21/2014		Active	8/21/2013
8/1/2013	Juvenile Informal Probation User Fees	8/1/2013	2/1/2014	12/6/2013	(Balance: \$90.00)	
8/1/2013	Community Service Fee (RC/PR)	8/1/2013	2/1/2014	12/6/2013	(Balance: \$40.00)	
8/1/2013	CASP Level 2 & 3	8/1/2013	2/1/2014		(Balance: \$195.00)	
Notes \$25 GPS PAYMENT PENDING						
8/1/2013	CASP Start up Fee	8/1/2013	2/1/2014		Paid	11/22/2013
<b>Total amount due for the requirements displayed: \$325.00</b>						

**FROM THE CASE DETAIL SCREEN:**



Assigned	Requirement	Start	Status	Status date	Add
8/21/2013	JUVENILE FORMAL PROBATION	8/21/2013	Active	8/21/2013	
8/21/2013	Diagnostic & Evaluation Services Mental Health	8/21/2013	Pending	8/21/2013	
8/21/2013	Substance Abuse Program Assessment	8/21/2013	Pending	8/21/2013	
8/21/2013	Employment (Obtain)	8/21/2013	Pending	8/21/2013	
8/21/2013	TASC Classes (GED) provided by Other	8/21/2013	Pending	8/21/2013	
8/21/2013	Victim Offender Restoration Program	8/21/2013	Pending	8/21/2013	
8/21/2013	Volunteer Community Service	8/21/2013	Pending	8/21/2013	

**To add a Requirement:**

- **Requirement Type:** Select the type of requirement.
- **Requirement Code:** Select the appropriate code.
- **Provider:** Select the service provider who will be providing this service, if applicable.
- **Assigned Date:** Date the requirement was ordered.
- **Start Date:** Date the requirement started.
- **Scheduled End Date:** Date this requirement is scheduled to end.
- **New End Date:** If another end date is necessary due to an extension of some kind enter the new end date.
- **Status and Status Date:** Used to display the current status of this requirement. The status date reflect the date of the status. As the status changes, the date should also.
- **Assessment frequency:** If you want to assess periodic fees, select the frequency the fee should be assessed.
- **Type:** The type of assessment.
- **Amount:** The amount of the periodic fee.
- **Initial type and Amount:** If it is a one-time fee instead of a periodic fee, you add the initial type and amount here.
- **Cases:** If you added the requirement from a case, that case will be selected. If you added from the menu, you will need to select which case this requirement is for.
- **Default Payee:** If you have restitution for example, you can click on get name button, which will pull up a list of case assignments and relatives, and you can select the victim. You then know who to make the restitution check payable to.
- **Notes:** You can make any notes necessary regarding the specifics of this requirement.

**Requirement Detail**

Requirement type: PROG - JUVENILE PROGRAMS  
 Requirement code: DEM - Diagnostic & Evaluation Services Mental Health  
 Provider: BMH - Bloomington Meadows Hospital  
 Assigned date: 8/21/13 Start date:   
 Scheduled end date: 10/20/1913 New end date:   
 Status: ACT3 - Active Status date: 8/21/13  
 Assessment frequency: -- Select -- Type: -- Select -- Amount:   
 Initial type: -- Select -- Amount:   
 Cases:  Joslyn Campbell: Case 1 - Respondent - Status (Active, Collection)  
 Joslyn Campbell: Case 2 - Respondent - 53C07-1306-JD-000015 (Active, Probation)  
 1 - BURGLARY (35-43-2-1), a Class C Felony - Dismissed  
 Default payee:   
 Notes:

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Requirement type: Fees  
 Requirement code: Initial & Monthly Probation Fees  
 Provider: -- Select --  
 Assigned date: 12/12/2013 Start date: 12/12/2013  
 Scheduled end date: 1/12/2014 New end date:   
 Status: -- Select -- Status date:   
 Assessment frequency: MNTH - Monthly Type: ASSD - Assess Probation User Fees Amount: \$15.00

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Requirement type: FEES - FEES  
 Requirement code: 219 - Juvenile Formal Administrative Fee  
 Provider: -- Select --  
 Assigned date: 8/21/13 Start date:   
 Scheduled end date:  New end date:   
 Status: -- Select -- Status date:   
 Assessment frequency: -- Select -- Type: -- Select -- Amount:   
 Initial type: ASSD - Assess Juvenile Formal Administrative Fe Amount: 100.00

Click on the UPDATE button or press ALT+U to save your changes.

Depending on the type of requirement you add, there may be more detailed areas that will appear. These are described below in the requirement detail section.

## Transaction Templates:

If you are adding a fee requirement, you may be taken directly to a transaction template once you update. For example, if your jurisdiction charges a client for every drug test taken, you may want one requirement called Drug Screen Fees. Each type of drug test may have a different fee, so rather than have a lot of requirements for all the drug fees, you can set up a template that will allow you to select the type of fee. This is also used in many jurisdictions for court costs. A court cost of \$91.00 is actually composed of \$2.00 to this agency and \$20.00 to another agency, etc. The transaction templates allow the Clerk to assess the court costs correctly.

Requirement Type: Fees  
 Requirement Code: Drug Screen Fees  
 Assigned Date: Date of first drug screen.

Once you Update, you are taken to the transaction templates.

You then can select which fee you wish to assess. If you hover over the template, it will display which account is being effected and the amount of the fee.

Once you select the desired template, you still have an opportunity to change the amount if necessary.

Update to add the fee.

Transaction Templates were added to Quest in 2013. There are many possibilities with this new section.

**Requirement Detail**

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Requirement type\* FEES - FEES  
 Requirement code\* DRUG - Drug Screen Fees  
 Provider: -- Select --  
 Assigned date: 1/3/2014 Start date:   
 Scheduled end date:  New end date:   
 Status: -- Select -- Status date:   
 Assessment frequency: -- Select -- Type: -- Select -- Amount:   
 Initial type: -- Select -- Amount:

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**Drug Screen Fees**  
Select a transaction

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**Transaction template**

Account	Name	Amount
Assess CC DTC Instant Fee		
Assess CC DTC Saliva Fee		
Assess CC Probation Instant Fee	R014 Community Corrections Prob Instant Fee	\$25.00
Assess CC Probation Saliva Fee		
Assess CC Urine Screen (Reasonable)		
Assess Civil Urine Screen Fee		
Assess Enhanced Urine Screen Fee		
<b>Total</b>		<b>\$25.00</b>

**Assess Requirement Fees**  
Drug Screen Fees

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Date: 1/3/2014 7:30:44 am x  
 Amount: \$25.00  
 Transaction number:  
 Reference number:  
 Memo: Assess CC Probation Instant Fee  
 Extra detail lines (below): 2

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Account	Amount
R014 - (A/R) Community Corrections Prob Instant Fee	\$25.00
-- Select --	0.00
-- Select --	0.00

## REQUIREMENT DETAIL:

Once you have added your basic requirement, several areas are now available. All requirements have Cases, Attributes, and Alerts.

Updates completed successfully

### Requirement Detail

Cases | Attributes | Alerts

Requirement type: PROBATION  
Requirement code: JUVENILE FORMAL PROBATION  
Provider: -- Select --  
Assigned date: 11/13/2013 Start date: 11/13/2013  
Scheduled end date: 5/13/2014 New end date:   
Status: ACT1 - Active Status date: 11/25/2013  
Default payee:   
Notes:

**Add**

Requirement cases		Top	Add
Erick Alvarez-Zaragoza (115; Case: 1; 53C07-1310-JD-000561)	Person detail	Case	

Requirement attributes		Top	Edit
None			

Requirement alerts		Top	Add
Date	Type	Finding	
None			

### Requirement Cases:

This will show you the names and cases this requirement is attached to. If you wish to add another case to the existing requirement, you can click on ADD to select another case by this person. You could also click on the existing name and case, click the NEW button, and all the other open cases will be available for you to select. Warning, when attaching one requirement to multiple cases, make sure they are going to run concurrently with each other. If one case closes before the other case, there is no way other than deleting that case from this requirement to show that they completed this requirement in the closed case at an earlier date.

## Requirement Attributes:

Attributes is a statistical area, fully customizable by jurisdiction, where you can keep information about that particular requirement.



Click Edit to select the appropriate attribute.

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**Requirement Attributes**  
Drug Court (Assigned: 5/13/2013; Start: 5/13/2013)

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MHD

- Attend Psychological Appointments
- Attend School
- Family Counseling
- Individual Counseling
- Prescribed Medication
- Psychological Evaluation
- Substance Abuse Assessment
- Urine Screens

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**Requirement Attributes**  
Community Alternative Supervision Program (Assigned: 8/29/2013; Start: 8/29/2013)

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AGE

- 18 - 20
- 21 - 30
- 31 - 40
- 41 - 50 Age Group
- 51 - 60
- 61 & over
- Under 18

DRUG COURT

- Drug free baby born
- Non-drug free baby born

TYPE

- Alcohol
- Drug
- Other
- Property
- Support
- Violent

It can contain any information you need to capture and it can be grouped any way you wish.

## Requirement Alerts:

Alerts can be set up for such things as electronic monitoring alerts.

Requirement type: Release Conditions  
 Requirement code: Home Confinement Supervised Release  
 Provider: -- Select --  
 Assigned date: 11/18/2013 Start date: 11/18/2013  
 Scheduled end date: New end date:  
 Status: -- Select -- Status date:  
 Default payee: Get name  
 Notes: School  
 6:15-3:15PM M-F  
 Spell check

Requirement cases Top		Person detail	Case	Add
Daisuane Jaray Adams (144480; Case: 3; 49D091311JD003496)				

Requirement attributes Top		Edit
None		

Requirement alerts Top			Add
Date	Type	Finding	
12/1/2013 11:44:13 AM	Youth Not Home Notes CA attempted home visit. Numerous knocks went unanswered.	Not In Compliance	Add
12/2/2013 7:19:38 PM	Youth Not Home Notes CA team 2 attempted a home visit. Youth was not home per female.	Not In Compliance	
12/15/2013 11:38:19 AM	Youth Not Home Notes CA attempted home visit. Y was out with his father per sibling.	Active	
12/18/2013 4:40:14 PM	Youth Not Home Notes CA team 2 attempted a home visit. No answer was made after several knocks at the front door.	Active	
12/24/2013 10:43:02 AM	Youth Not Home Notes CA attempted home visit. Y was not home per M. M said she has no idea where Y is.	Active	

### Requirement Alert Detail

Home Confinement Supervised Release (Assigned: 11/18/2013; Start: 11/18/2013)

Alert date: 12/1/2013 11:44:13 AM  
 Alert type: HC1 - Youth Not Home  
 Alert finding: AF2 - Not In Compliance  
 Notes: CA attempted home visit. Numerous knocks went unanswered.

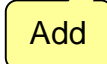
- **Alert date:** Enter the date/time of the alert.
- **Alert type:** Select the appropriate type of alert.
- **Alert finding:** Select the appropriate finding.
- **Notes:** Enter any applicable notes.

Click on the UPDATE button or press ALT+U to save your changes.

## Phases for this Requirement:

Many programs have phases a person must complete to move through the program. Drug Court is an example of such a program.

Phases for this requirement <a href="#">Top</a>					<a href="#">Add</a>
Name	Start date	Week	Status	End date	
<b>Drug Court - Phase 4</b>	12/16/2013	2	Active / Enrolled		
<input type="checkbox"/> Maintain Sobriety <input type="checkbox"/> Life Plan-Demonstrate Ability to work towards Life <input type="checkbox"/> Support Group Meetings-Maintain contact sponsor <input type="checkbox"/> Focus on Life Plan <input type="checkbox"/> Court Appearances Bi-Weekly <input type="checkbox"/> Drug Screen-one per week <input type="checkbox"/> Obtain GED if applicable <input type="checkbox"/> Maintain Suitable Employment/or Course of Study <input type="checkbox"/> Reunified with Children if applicable <input type="checkbox"/> Community Service Project-Begin					



- **Start Date:** The date the person starts this phase.
- **Phase:** The phase the person is currently in.
- **Current Status:** Select the current status of this phase.
- **End Date:** The date this phase is completed.
- **Notes:** Any notes you wish to make about this phase.

Click on the UPDATE button or press ALT+U to save your changes.

Under each phase is a list of items that person must do to complete that phase of the program.

As the person completes each item, you can click on the phase to update the items and notes.

After the phase is completed, you can add the next phase.

### Requirement Phase Detail

**DRUG COURT (Assigned: 12/16/2013; Start: 12/16/2013; Active as of 12/16/2013)**

Start date: 12/16/2013  
 Phase: Drug Court - Phase 4  
 Current status: ACT - Active / Enrolled  
 End date:

Notes:

[Spell check](#)

Items for this Phase	Completion date
<input checked="" type="checkbox"/> Maintain Sobriety	12/26/2013
<input type="checkbox"/> Life Plan-Demonstrate Ability to work towards Life	
<input type="checkbox"/> Support Group Meetings-Maintain contact sponsor	
<input checked="" type="checkbox"/> Focus on Life Plan	12/26/2013
<input type="checkbox"/> Court Appearances Bi-Weekly	
<input type="checkbox"/> Drug Screen-one per week	
<input checked="" type="checkbox"/> Obtain GED if applicable	12/26/2013
<input type="checkbox"/> Maintain Suitable Employment/or Course of Study	
<input type="checkbox"/> Reunified with Children if applicable	
<input type="checkbox"/> Community Service Project-Begin	

Phases for this requirement <a href="#">Top</a>					<a href="#">Add</a>
Name	Start date	Week	Status	End date	
<b>Work Release</b>	9/9/2013	1	Complete	9/9/2013	
<input checked="" type="checkbox"/> Complete Time 9/9/2013					
<b>Day Reporting with Home Detention</b>	9/9/2013	1	Complete	9/9/2013	
<input checked="" type="checkbox"/> Obtain Employment 9/9/2013 <input checked="" type="checkbox"/> Substance Free 9/9/2013					
<b>Home Detention</b>	9/9/2013	1			
<input type="checkbox"/> Combination of day reporting with home detention <input type="checkbox"/> Home Detention <input type="checkbox"/> Step Down Home Detention					

## Treatments for this Requirement:

Add

Treatment	Start date	Status	End date
None			

Click on ADD to add a treatment. Select

- **Start Date:** The date the person starts this treatment.
- **Treatment:** The treatment the person is currently receiving.
- **Current Status:** Select the current status of this treatment.
- **End Date:** The date this treatment is completed.
- **Notes:** Any notes you wish to make about this treatment.

### Requirement Treatment Detail Community Alternative Supervision Program (Assigned: 9/9/2013; Start: 9/9/2013)

Start date:

Treatment: \* PSYE - Psychological Evaluation

Current status: -- Select --

End date:

Notes:

Click on the UPDATE button or press ALT+U to save your changes.

Treatment	Start date	Status	End date
IOP	1/1/2013	Complete	3/5/2013
Individual therapy	3/8/2013	Attending	
	3/22/2013	Attending	
Smart Recovery	5/27/2013	Attending	



## Incentives and Sanctions for this Requirement:

You can keep track of the different incentives and sanctions this person received.



Incentives for this requirement <a href="#">Top</a>				<a href="#">Add</a>
Action date	Incentive	Reason	Notes	
None				

Sanctions for this requirement <a href="#">Top</a>				<a href="#">Add</a>
Action date	Sanction	Reason	Notes	
None				

Click ADD to add incentives or sanctions. Incentives and sanctions work the same, so for illustration purposes I will only display incentives.

**Action Date:** Date of incentive or sanction.

**Incentive/Sanction:** Choose the appropriate incentive or sanction.

**Reason:** Select the reason for the incentive/sanction.

**Notes:** Any notes you wish to make.

### Requirement Incentive Detail Community Alternative Supervision Program (Assigned: 9/9/2013; Start: 9/9/2013)

Action date:

Incentive:\*

Reason:\*

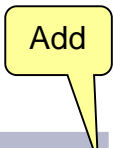
Notes:

Incentives for this requirement <a href="#">Top</a>			
Action date	Incentive	Reason	Notes
1/2/2013	Gift certificates	Maintained weekly average	FE Card.
1/9/2013	Gift certificates	Maintained weekly average	FE gift card and compliance incentive.
1/16/2013	Kudos	Maintained weekly average	Candy bar and compliance incentive.
1/23/2013	Food coupon	10 Clean Drug Screens	
1/23/2013	Gift certificates	Maintained weekly average	Candy Bar and compliance incentive.
1/30/2013	Good Citizen Award	Maintained weekly average	Candy bar and McDonald's gift card.
2/6/2013	Good Citizen Award	Maintained weekly average	Candy bar and compliance.
2/13/2013	Food coupon	Maintained weekly average	Candy bar.
2/13/2013	Gift certificates	10 Clean Drug Screens	Kohl's
2/20/2013	Kudos	Maintained weekly average	Candy bar and compliance.

Sanctions for this requirement <a href="#">Top</a>			
Action date	Sanction	Reason	Notes
12/12/2012	Electronic monitoring	Sanction at start of Drug Court	12/12 hook up date.
1/11/2013	Home Detention	Sanction at start of Drug Court	Step down from EM.
2/27/2013	Community service	Schedule violation	12 hours.
5/10/2013	Home Detention	Other	School suspension. HA until reviewed at Drug Court on Wednesday.
5/24/2013	Detention	Schedule violation	curfew violation/unapproved contacts
5/29/2013	Community service	Schedule violation	12 hours per week.
	Electronic monitoring	Schedule violation	violation of curfew.
6/5/2013	Other Sanction	Failed Drug Screen	Attend Day Reporting. (4 days per week.)
8/14/2013	Writing a paper	Failed Drug Screen	Paper on reason for relapse.
8/21/2013	Detention	Failed Drug Screen	Removed from Day Reporting. 2nd Failed Drug Screen.
			Serve 5 consecutive weekends in detention.

## Requirement Phase Hours:

Some programs are based on length of time. If so, you can keep track of phase hours.



Requirement Phase Hours <a href="#">Top</a>			
Date	Type of work	Hours	Description
DrugCrtPhs3 - 8/7/2013 (0.00 hours) <a href="#">Add</a>			
None			
DrugCrtPhs2 - 3/14/2013 (15.00 hours) <a href="#">Add</a>			
3/14/2013	Community 2	0.00	participate in a pro-social activity
3/14/2013	Community 3	0.00	participate in home visits as needed
3/14/2013	Community 1	0.00	Assigned to Chronic Offenders
3/14/2013	Culture 1	0.00	restricted areas identified at home.
3/14/2013	Education 1	0.00	Attend probation meetings
3/14/2013	Education 2	0.00	attend substance abuse groups as needed
3/14/2013	Education 3	0.00	Attend school
3/14/2013	Education 4	0.00	academic progress reports
3/14/2013	Life skills 1	0.00	continue to develop a relapse prevention plan
3/14/2013	Life skills 2	0.00	Develop phase III case plan
3/14/2013	Self-Concept 2	5.00	therapeutic writing assignment
3/14/2013	Self-Concept 3	0.00	journaling
3/14/2013	Self-Concept 4	5.00	complete petition for phase III
3/14/2013	Self-Concept 1	5.00	45 days clean to advance to phase III
3/14/2013	Support 2	0.00	parent/drug court approved contacts (Destiny)
3/14/2013	Support 1	0.00	attend Individual/family counseling

- **Completion date:** Date person completed these hours.
- **Type of Hours:** Select the appropriate type of hours.
- **Hours:** Type the number of hours completed.
- **Notes:** Any notes you wish to make about these hours.

### Requirement Phase Hours Detail Drug Court Phase 2 - 3/14/2013, Complete 8/7/2013

Completion date: 3/14/2013

Type of hours: Community 2

Hours:

Notes:

Click on the UPDATE button or press ALT+U to save your changes.

## Requirement Components:

If you need to keep track of sentencing information, you can set up a requirement type/code for that purpose.

Updates completed successfully

### Requirement Detail

[Cases](#) | [Components](#) | [Concurrency](#) | [Attributes](#) | [Alerts](#)

Requirement type: SENTENCE INFORMATION  
 Requirement code: Sentence  
 Provider: -- Select --  
 Assigned date: 12/18/2013 Start date: 12/18/2013  
 Scheduled end date: 12/16/2014 New end date:   
 Status: ACT6 - Active Status date: 12/18/2013  
 Default payee: [Get name](#)  
 Notes:   
 Spell check

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**Requirement cases** [Top](#)  
 April Nicole Adams, I (161; Case: 1; 53C02-1308-CM-012365; Count: 2) [Person detail](#) [Case](#) [Add](#)

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**Requirement components** [Top](#)  
 Sentenced - 365 Days [Edit](#)  
 Executed - 1 Days  
 Community Corrections - 12 Days  
 Jail Credit - 1 Days  
 Suspended - 363 Days  
 Probation - 12 Months

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**Requirement concurrency** [Top](#)  
 Served concurrently with Sentence on 53C05-1205-FD-000417 Count 1A [Edit](#)

Add

Add

Under requirement cases, you may notice that this requirement is added for a specific filed statute count.

Enter the specific sentence that was given for that count.

#### Requirement Components

Sentence (Assigned: 12/18/2013; Start: 12/18/2013; Active as of 12/18/2013)

Component	Term	Unit
Sentenced	365	T3 - Days
Executed	1	T3 - Days
Community Corrections	12	T3 - Days
Jail Credit	1	T3 - Days
Suspended	363	T3 - Days
Probation	12	T2 - Months

Click on the UPDATE button or press ALT+U to save your changes.

## Requirement Concurrency:

You can specify if this sentence is to run consecutive, concurrent, before, or none to any other sentence that has been added.

#### Requirement Concurrency

Sentence (Assigned: 12/18/2013; Start: 12/18/2013; Active as of 12/18/2013)

None  Before  Consecutive  Concurrent  Requirement

Sentence (Assigned: 7/9/2013; Start: 7/9/2013; Active as of 7/11/2013)  
 April Nicole Adams, I (161; Case: 2; 53C05-1205-FD-000417; Count: 1A)

Click on the UPDATE button or press ALT+U to save your changes.

## Requirement Balances:

When you add a financial requirement, you have two new sections, Balances, which is the Account totals, and Requirement Transactions. Quest uses a double entry accounting system so every transaction has two entries, one is a debit to an account, and the other is a credit to an account. Under the account totals, you will see the balance of each account. This is something that the computer generates so you as a user are unable to add or edit anything in this section.

Account totals <a href="#">Top</a> (Balance due for all accounts: \$90.00)	
Total	Account
\$100.00	Juvenile Formal Administrative Fee Assessed
\$10.00	Undeposited Funds
\$90.00	Juvenile Formal Administrative Fee

Requirement transactions <input type="checkbox"/> Descending <a href="#">Top</a>			
Date	Type	Number	Memo
8/21/2013 12:00 AM	Assessment		Assess Juvenile Formal Administrative Fe
12/27/2013 8:04:07 AM	Payment	0000085	Pay Juvenile Formal Administrative Fee

Added by Debra Wiley on 12/19/2013 9:21:33 AM  
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Add

[Add a transaction](#)  
[Assess fees](#)  
[Take a Payment](#)  
[Waive Fees](#)  
[Adjustments](#)  
[General journal entry](#)

## Requirement Transactions:

This section allows you to assess fees, take payments, waive payments, make journal entries, etc. based on your authority. Click on the Options button to select your action.

### Add a Transaction:

Adding a transaction can be used for a payment of fees, or can be used to show community service hours performed.

- **Date:** Enter the date/time of the transaction.
- **Type:** Select the type of transaction you would like to make.
- **Amount:** Enter the dollar amount or the number of hours worked.
- **Payment method:** If taking a payment, you must select the payment method.
- **Payor or Payee:** The person making a payment. You can click on the Lookup button below Address to select the person from a list of case assignment people and relatives. By selecting the person this way, their address will be added to the receipt.
- **Transaction number:** This is automatically assigned by the system.
- **Memo:** If you wish to make a note on the transaction.
- **Reference number:** Often used for the check number.

Transaction Detail

Date:	<input type="text"/>
Type:	-- Select --
Amount:	<input type="text"/>
Payment method:	-- Select --
Payor/payee:	<input type="text"/>
Address:	<input type="text"/>
	<input type="button" value="Lookup"/>
Transaction number:	<input type="text"/>
Memo:	<input type="text"/>
Reference number:	<input type="text"/>

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---

Click on the UPDATE button or press ALT+U to save your changes.

---

## Assess Fees:

Assessing a fee is just like adding a transaction.

- **Date:** Enter the date/time of the transaction.
- **Type:** Select the type of transaction you would like to make.
- **Amount:** Enter the dollar amount of the fee.

**Transaction Detail**

---

Date: 12/27/2013 8:22:29 am

Type: ASSD - Assess Juvenile Formal Administrative Fe

Amount: 100.00

Payment method: -- Select --

Payor/payee:

Address:

Transaction number:

Memo:

Reference number:

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---

Click on the UPDATE button or press ALT+U to save your changes.

---

## Take a Payment:

When you select the take a payment option, all open fee requirements for this person, regardless of case, will appear. The fees are sorted by which fee should be paid first. Quest will put the payment on the first fee automatically. If you wish to change the payment to a different fee, simply delete the amount off the first line and add it to whatever fee you wish to pay.

**Payment Detail**

---

*new entry.*

Date: 12/27/2013 8:25:44 am

Tendered: \$10.00

Amount paid: \$10.00

Change due: \$0.00

Payment method: MO - Money Order  Credit card fee: 0.00

Received from: Belinda NMN Latrell

Address: 315 West Gordon Pike  
Lot #45  
Bloomington, IN 47403 USA

Transaction number:

Memo:

Reference number: 0087943567

Case	Seq	Requirement	Current due	Payment type	Amount
Kalib David Ray Grubb (156; Case: 1; 53C07-0910-JD-007746)	31	Juvenile Formal Administrative Fee	\$90.00	PAY - Pay Juvenile Formal Administrative Fee	\$10.00
Kalib David Ray Grubb (156; Case: 1; 53C07-0910-JD-007746)	34	Juvenile Formal Probation User Fee	\$250.00	-- Select --	
Kalib David Ray Grubb (156; Case: 2; 53C07-1308-JD-000001)	34	Juvenile Formal Probation User Fee	\$200.00	-- Select --	

- **Date:** Enter the date/time of the payment.
- **Tendered:** Enter the amount of money given to you. If they hand you \$50.00 and they only owe \$25.00, the amount paid will automatically change to \$25.00 and the change due will reflect \$25.00 in change is due.
- **Amount paid:** This is a required field, so you can skip the tendered line and just put amount paid if you know there will be no change due.
- **Change due:** The amount of money to be returned to the client.
- **Payment method:** Select the appropriate type of payment.

- **Credit card fee:** If the client paid by credit card, and it is your policy to charge a fee for that service, enter the fee amount here.
- **Received from:** The person making a payment. You can click on the Lookup button below Address to select the person from a list of case assignment people and relatives. By selecting the person this way, their address will be added to the receipt.
- **Transaction number:** This is automatically assigned by the system.
- **Memo:** If you wish to make a note on the transaction.
- **Reference number:** Often used for the check number.
- **Payment type:** This will automatically select the type of transaction for you. If you change the amount to another line, after you update this will be selected.
- **Amount:** This is the amount of money being applied to each fee.

Case	Seq	Requirement	Current due	Payment type	Amount
Kalib David Ray Grubb (156; Case: 1; 53C07-0910-JD-007746)	31	Juvenile Formal Administrative Fee	\$90.00	PAY - Pay Juvenile Formal Administrative Fee	\$10.00
Kalib David Ray Grubb (156; Case: 1; 53C07-0910-JD-007746)	34	Juvenile Formal Probation User Fee	\$250.00	-- Select --	
Kalib David Ray Grubb (156; Case: 2; 53C07-1306-JD-000001)	34	Juvenile Formal Probation User Fee	\$200.00	-- Select --	

Click on the UPDATE button or press ALT+U to save your changes.

Once you have saved your payment, you can Click on VIEW RECEIPT to print the receipt and assign a receipt number. Cancel out of the print preview screen to return to the PAYMENT DETAIL screen.



An easier way to take payments is from the MENU, Case, Requirements screen, with the financial view option selected.

You will be able to see the total amount due and any notes associated with the requirement.

If you take a payment from this window, you are still taken to the PAYMENT DETAIL window shown above.

**List Requirements**  
**Baby Jones (File# 14)**

Case: 1 - Child - 13-DN-2 (Active; Case Filed)  Show names/cases  Financial view  
 Show details

Assigned date	Seq	Requirement type	Default payee	Status	Status date		
<b>Add a new requirement</b>							
9/5/2013		<b>Court Costs</b>			(Balance: \$130.00)		
		Name	Assess	Payments	Adjustments	Other	Due
		Clerk Fee Due	\$98.00	\$0.00	\$0.00	\$0.00	\$98.00
		ClkDataFee Due	\$4.00	\$0.00	\$0.00	\$0.00	\$4.00
		Sheriff Due	\$26.00	\$0.00	\$0.00	\$0.00	\$26.00
		SheriffData Due	\$2.00	\$0.00	\$0.00	\$0.00	\$2.00
9/5/2013		<b>Drug Screen Fee</b>					(Balance: \$100.00)
		Name	Assess	Payments	Adjustments	Other	Due
		Drug Screen	\$100.00	\$0.00	\$0.00	\$0.00	\$100.00
9/8/2013		<b>Options Program Fee</b>					(Balance: \$20.00)
		Name	Assess	Payments	Adjustments	Other	Due
		OfFeeDue	\$20.00	\$0.00	\$0.00	\$0.00	\$20.00
9/5/2013	A1	<b>Restitution</b>					(Balance: \$1,000.00)
		Name	Assess	Payments	Adjustments	Other	Due
		Rest Due	\$1,000.00	\$0.00	\$0.00	\$0.00	\$1,000.00
<b>Total amount due for the requirements displayed: \$1,250.00</b>							

## To Void a Transaction:

Select the transaction you wish to void.

Requirement transactions					Options
Date	Type	Number	Memo	Amount	
9/5/2013 2:22:07 PM	Assessment		Assess Restitution	\$1,000.00	
9/8/2013 2:03:07 PM	Payment	*ToPrint	Pay Restitution	\$75.00	

In the payment detail screen, click the VOID button.

**Payment Detail**

Date: 9/8/2013 2:03:07 PM x

Tendered: \$100.00

Amount paid: \$75.00

Change due: \$25.00

Payment method: CASH - Cash Credit card fee: 0.00

Received from:


Address:

Transaction number: \*ToPrint

Memo: Pay Restitution

Reference number:

Case	Seq	Requirement	Current due	Payment type	Amount
Baby Jones (14; Case: 1; 13-DN-2)	1	Restitution Due (Payor: Wertz, Ronald)	\$925.00	PAY - Pay Restitution	\$75.00



Type in the Void Reason, click the VOID button to save your changes.

**Void Transaction**

Date: 9/8/2013 2:03:07 PM

Type: Payment No: \*ToPrint

Amount: \$75.00 Cash

Name:

Memo:

Reference No:

**WARNING** - this Void process can not be reversed. To void the above transaction, enter the void reason below and press the Void button.

Void reason:

Click on the UPDATE button or press ALT+U to save your changes.

In the Requirement Transactions, you will see that the payment has been voided, a General Journal Entry has been made, and the Restitution Due is back to the amount before the payment.

Account totals		Top (Balance due for all accounts: \$1,000.00)	
Total	Account		
<b>Restitution</b>			
\$1,000.00	Restitution Assessed		
\$1,000.00	Restitution Due		

Requirement transactions					Options
Date	Type	Number	Memo	Amount	
9/5/2013 2:22:07 PM	Assessment		Assess Restitution	\$1,000.00	
9/8/2013 2:03:07 PM	Payment	*ToPrint	VOID:	\$75.00	
9/8/2013 2:15:57 PM	General	0000003-GENJ	Payment is being applied to the wrong fee	\$75.00	

## Waive Fees:

On the List Requirements Screen, or on the Requirement Detail Screen, click the Waive Fees button, just like taking a payment.

**Waiver Detail**

This is a new entry.

Date:

Amount paid:

Transaction number:

Memo:

Reference number:

Case	Seq	Requirement	Current due	Waiver type	Amount
Baby Jones (14; Case: 1; 13-DN-2)	1	Restitution Due <small>(Payor: Wertz, Ronald)</small>	\$925.00	-- Select --	<input type="text"/>
Baby Jones (14; Case: 1; 13-DN-2)	2	Drug Screen Fee Due	\$100.00	WAIV - Waive Fee	\$100.00
Baby Jones (14; Case: 1; 13-DN-2)	2	Options Fees Due	\$20.00	-- Select --	<input type="text"/>
Baby Jones (14; Case: 1; 13-DN-2)	3	<b>Court Costs</b>	\$55.00		
		Clerk Fee Due	\$53.00	-- Select --	<input type="text"/>
		Sheriff Dept Data Fee Due	\$2.00	-- Select --	<input type="text"/>

- **Date:** Enter the date/time.
- **Amount paid:** Enter the total amount of fees being waived.
- **Transaction number:** This is automatically assigned by the system.
- **Memo:** If you wish to make a note on the transaction.
- **Reference number:** Enter a reference number if applicable.

Go to the amount column and enter the amount each fee is being waived. If there are options under Waiver type column, you will need to select the appropriate option.

Click on the UPDATE button or press ALT+U to save your changes.

You will see under the account totals that the balance due is now \$0.00.

Account totals <a href="#">Top</a> (Balance due for all accounts: \$0.00)	
Total	Account
<b>Drug Screen Fee</b>	
\$100.00	Drug Screen Assessed
\$100.00	Drug Screen Waived
\$0.00	Drug Screen Fee Due

Requirement transactions <input type="checkbox"/> Descending <a href="#">Top</a>				Options
Date	Type	Number	Memo	Amount
9/5/2013 2:37:55 PM	Assessment		Assess Fee	\$100.00
9/8/2013 2:07:49 PM	Debit/Credit		Waive Fee	\$100.00



## Adjustments:

In the event you take a fee payment and you applied it to the wrong fee, you can make an adjustment.

### Adjustment Detail

Date:  x

Adjustment amount: \$50.00

Name:

Transaction number:

Memo:

Reference number:

Case	Seq	Requirement	Payments	Adjustments	Due	Amount
Kalib David Ray Grubb (156; Case: 1; 53C07-0910-JD-007746)	34	<b>Juvenile Formal Probation User Fees</b>			\$180.00	
		Juvenile Formal Probation User Fee	\$120.00	(\$50.00)	\$180.00	(\$50.00)
Kalib David Ray Grubb (156; Case: 2; 53C07-1306-JD-000001)	34	<b>Juvenile Formal Probation User Fees</b>			\$150.00	
		Juvenile Formal Probation User Fee	\$50.00	\$50.00	\$150.00	\$50.00

- **Date:** Enter the date/time.
- **Adjustment amount:** Enter the total amount you wish to move.
- **Amount:** Enter a negative amount on the wrong fee, and a positive amount on the right fee.
- **Memo:** Enter an explanation of why you are making an adjustment.

Click on the UPDATE button or press ALT+U to save your changes.

Under account totals you will see the current balance for this fee requirement, and under requirement transactions you will see an adjustment.

Account totals <a href="#">Top</a> (Balance due for all accounts: \$180.00)	
Total	Account
\$250.00	Juvenile Formal Probation User Fee Assessed
\$120.00	Undeposited Funds
\$180.00	Juvenile Formal Probation User Fee

Requirement transactions <input type="checkbox"/> Descending <a href="#">Top</a> <a href="#">Options</a>				
Date	Type	Number	Memo	Amount
8/21/2013 12:00 AM	Assessment		Assess Juvenile Formal Probation User Fe	\$250.00
12/27/2013 9:03:26 AM	Payment	0000087	Pay Juvenile Formal PUF	\$20.00
12/27/2013 9:06:16 AM	Payment	0000088	Pay Juvenile Formal PUF	\$50.00
12/27/2013 9:06:52 AM	Payment	0000089	Pay Juvenile Formal PUF	\$50.00
12/27/2013 9:21:28 AM	Adjustment		Applied funds to the wrong account	\$50.00

## Add a General Journal Entry:

The **general journal** is where double entry bookkeeping entries are recorded by debiting one or more accounts and crediting another one or more accounts with the same total amount. The total amount debited and the total amount credited should always be equal, thereby ensuring the accounting equation is maintained.

Restitution			
\$1,000.00	Restitution Assessed		
\$900.00	Restitution Due		

Requirement transactions <input type="checkbox"/> Descending <a href="#">Top</a>			
Date	Type	Number	Memo
9/5/2013 2:22:07 PM	Assessment		Assess Restitution
9/8/2013 2:03:07 PM	Payment	*ToPrint	VOID:
9/8/2013 2:15:57 PM	General	0000003-GENJ	Payment is being applied to the wrong fee
9/8/2013 2:53:33 PM	General	0000004-GENJ	Chose wrong account

Add a transaction [ns](#)

Add a general journal entry

[Assess fees](#)

[General Journal](#) [Payment](#)

[Waive Fees](#)

\$100.00

Click on the requirement, click on the Options, click on the Add a general journal entry.

### General Journal Entry Detail

Restitution (Assigned: 9/5/2013; Start: 9/5/2013; Balance: \$1,000.00)

---

Date:

Payment method:

Payor/payee:

Transaction number:

Reference number:

Detail lines (below):

---

Account	Credit	Debit
RRS - (A/R) Restitution Due <input type="text" value="v"/>	100.00	
Memo: <input type="text" value="Chose wrong account"/>		
R039 - (A/R) Drug Screen Fee Due <input type="text" value="v"/>		100.00
Memo: <input type="text" value="This is the correct account"/>		
-- Select -- <input type="text" value="v"/>		
Memo: <input type="text" value="Memo"/>		
-- Select -- <input type="text" value="v"/>		
Memo: <input type="text" value="Memo"/>		

Choose the accounts that will be effected. Type your credit and debit amounts. Make a memo entry explaining the transaction.

Click on the UPDATE button or press ALT+U to save your changes.

See more about [General Journal Entries](#)

## To close a requirement:

Click on the Assigned date of the requirement you wish to close, update the status and status date.

Assigned	Requirement	Start	Status	Status date
8/21/2013	Road Crew Hours	8/21/2013	(Balance: 14.00)	
8/21/2013	Court Costs and Other Non-A/D Fees in Odyssey	8/21/2013		
8/21/2013	Juvenile Formal Administrative Fee	8/21/2013	Paid in full	12/27/2013
8/21/2013	Juvenile Formal Probation User Fees	8/21/2013	(Balance: \$170.00)	
8/21/2013	Drug Screen Fees	8/21/2013		
8/21/2013	Apology letter	8/21/2013		

- **Status:** Select the appropriate status.
- **Status date:** The date of the new status.

### Requirement Detail

Cases | Attributes | Alerts

Requirement type: JUVENILE PROGRAMS  
 Requirement code: Apology letter  
 Provider: -- Select --  
 Assigned date: 8/21/2013 Start date: 8/21/2013  
 Scheduled end date: 5/21/2014 New end date:  
 Status: C - Completed Successfully Status date: 12/30/2013  
 Default payee: Get name  
 Notes:

Click on the UPDATE button or press ALT+U to save your changes.

## To add a requirement for community service work:

A person is ordered to complete so many hours of community service work. Therefore, the requirement acts like a fee payment. Hours are assessed, then they are worked or "paid".

Account totals Top (Balance due for all accounts: \$40.00)	
Total	Account
70.00	Public Service Assessed
30.00	Public Service Performed
40.00	Public Service Due

Requirement transactions Descending Top Options				
Date	Type	Number	Memo	Amount
9/8/2013 2:43:29 PM	Assessment		Assess Public Service Hours	\$70.00
9/8/2013 2:43:56 PM	Debit/Credit		Zoo	30.00

Click on the Requirement. On the Requirement Transactions, click Options, click Add a Transaction.

Requirement transactions Descending Top				
Date	Type	Number	Memo	Amount
9/8/2013 2:43:29 PM	Assessment		Assess Public Service Hours	\$70.00
9/8/2013 2:43:56 PM	Debit/Credit		Zoo	30.00

**Add a transaction**

Add a new record. Journal entry.

[Alt+a is a keyboard shortcut for selecting this link.]

**Take a Payment**

**Waive Fees**

Printed by Bill Fortsack on 9/8/2013 2:52:07 PM

- **Date:** Date work was done.
- **Type:** You can assess (add) hours or show hours served (performed).
- **Amount:** Total number of hours added or worked.
- **Memo:** Where work was performed.

**Transaction Detail**

---

Date:

Type: SERV - Served Public Service Hours

Amount: 10

Payment method: -- Select --

Payor/payee:

Address:

Transaction number:

Memo: Road Crew

Reference number:

---

Click on the UPDATE button or press ALT+U to save your changes.

---

Requirements Top						Options
Name	Assigned	Requirement	Start	Status	Status date	
Baby Jones	9/8/2013	Options Program Fee	9/8/2013	(Balance: \$20.00)		
Baby Jones	9/5/2013	Family Counseling	9/5/2013			
Baby Jones	9/5/2013	Driver's License Held Informally	9/5/2013			
Baby Jones	9/5/2013	Traffic Safety School provided by Youth Villages	9/5/2013			
Baby Jones	9/5/2013	Court Costs	9/5/2013	(Balance: \$55.00)		
Baby Jones	9/5/2013	Restitution	9/5/2013	(Balance: \$1,000.00)		
Baby Jones	9/5/2013	Public Service	9/5/2013	(Balance: 30.00)		
Baby Jones	9/5/2013	Drug Screen Fee	9/5/2013			
Baby Jones	9/5/2013	Drug Test	9/5/2013			
Baby Jones	9/5/2013	Court Defined Curfew	9/5/2013			
Baby Jones	9/5/2013	County Probation Supervised	9/5/2013			

On the requirement screen, it will show the total hours remaining.