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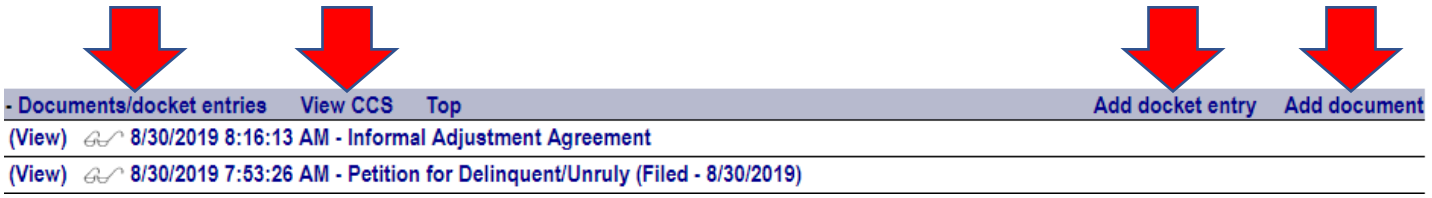
DOCUMENTS/DOCKET ENTRIES

This area allows you to add and view all documents and docket entries on a person, a specific case, or on all cases. Documents are very powerful tools in Quest. Not only do they pull in information FROM Quest, they also can update information IN Quest using the template function FF UPDATE.

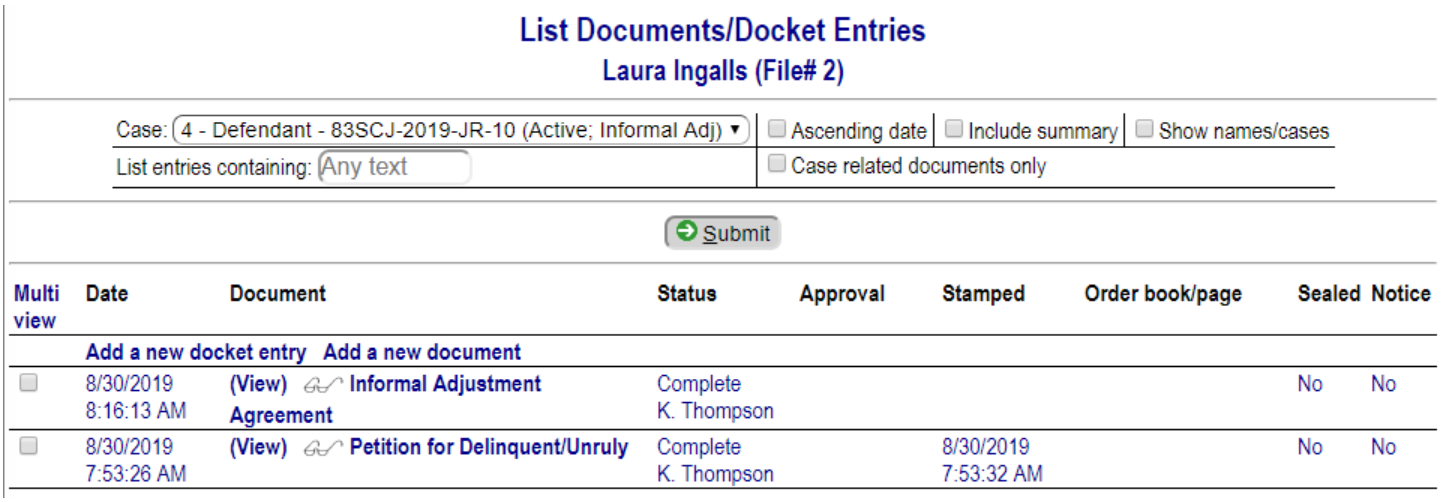
You can get to documents from many areas: the **Person and Case Detail** screens, the **Supervision Dashboard**, the **Event Detail** screen, and directly from the **Menu | Case | Documents**.

The difference between documents and docket entries is a docket entry allows you to just make an entry on the chronological case summary (CCS) and scan a document into that entry, if desired. A document allows you to create a document using a template and allows the use of FF UPDATES so you can update Quest with your answers inside the document.



List Documents/Docket Entries

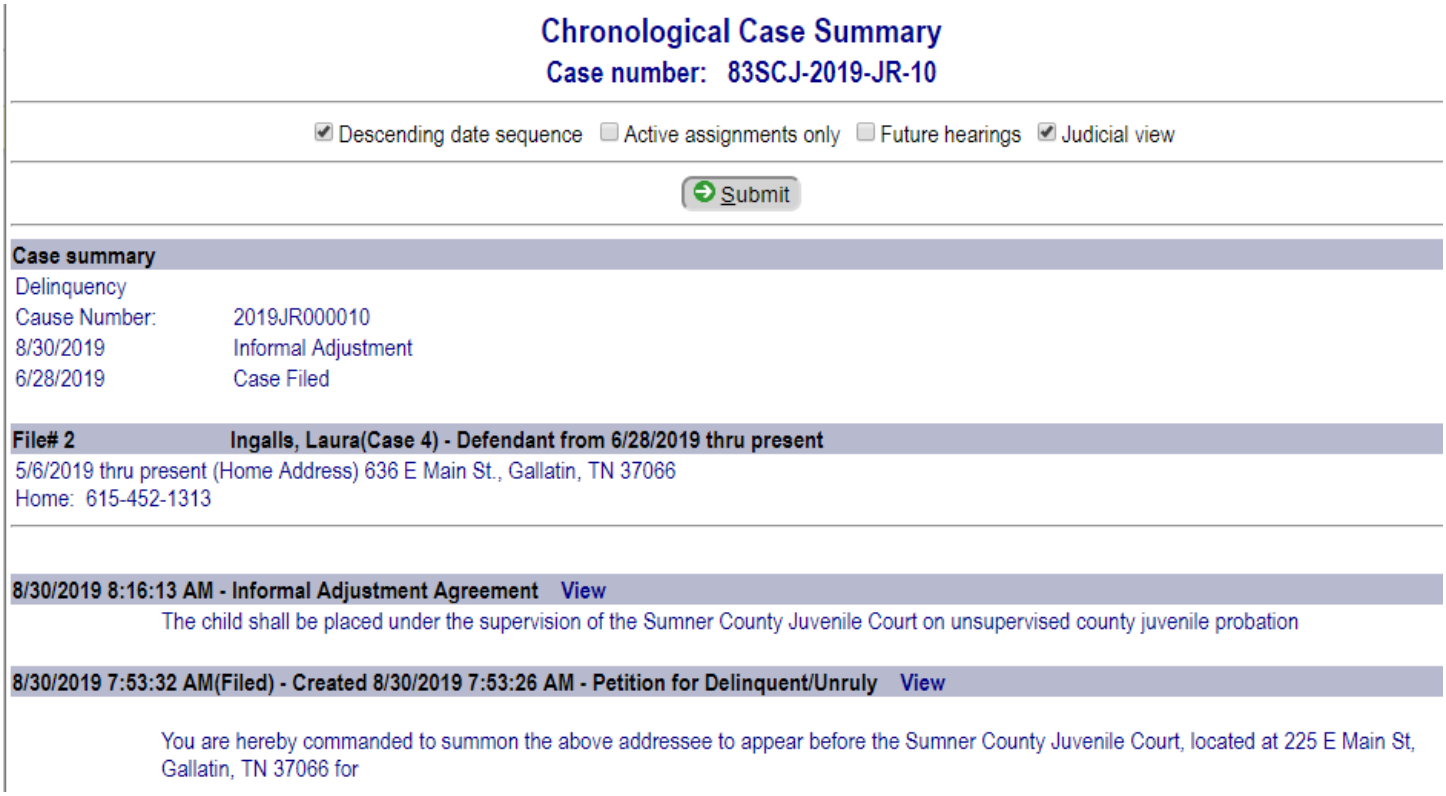
If you click the **Documents/docket entries** link you will be taken to the List Documents/Docket Entries screen where you can view all document and even search for entries containing a specific word, such as Order, to limit the list to only orders.



- **Case**: You can select a specific case to view or leave on select to view all.
- **Ascending date**: Checked this will sort by oldest date on top. Unchecked it will sort by most recent on top.
- **Include Summary**: Checked, the display will include the entry made on the CCS.
- **Show names/cases**: Checked, if you are viewing all cases, the display will include the name, file number, case number, and cause number for each entry.
- **List entries containing**: If you have a long list, you can narrow your search by typing in a key word, such as “letter”, click on submit and only those entries that contain the word letter will be displayed. Be careful because this word remains until cleared. The next list will only display entries with the word “letter” also. This can cause confusion when you can’t view documents that don’t contain that word. Best practice is to delete the word and press the **Submit** button before leaving the screen.
- **Case related documents only**: Some documents are attached to a person only, such as birth certificate for example, checked this will display only those documents that are attached to a case. Unchecked this will display all documents.
- **Multi view**: Allows you to click all documents you wish to view, and they will be displayed at one time. This save you from viewing one document, hitting cancel, clicking view on the next document, hitting cancel.

View CCS

If you click the **View CCS** link you will be taken to the Chronological Case Summary where a summary of every document is listed.



Chronological Case Summary

Case number: 83SCJ-2019-JR-10

☑ Descending date sequence ☐ Active assignments only ☐ Future hearings ☑ Judicial view

Submit

Case summary

Delinquency
Cause Number: 2019JR000010
8/30/2019 Informal Adjustment
6/28/2019 Case Filed

File# 2 Ingalls, Laura(Case 4) - Defendant from 6/28/2019 thru present

5/6/2019 thru present (Home Address) 636 E Main St., Gallatin, TN 37066
Home: 615-452-1313

8/30/2019 8:16:13 AM - Informal Adjustment Agreement View

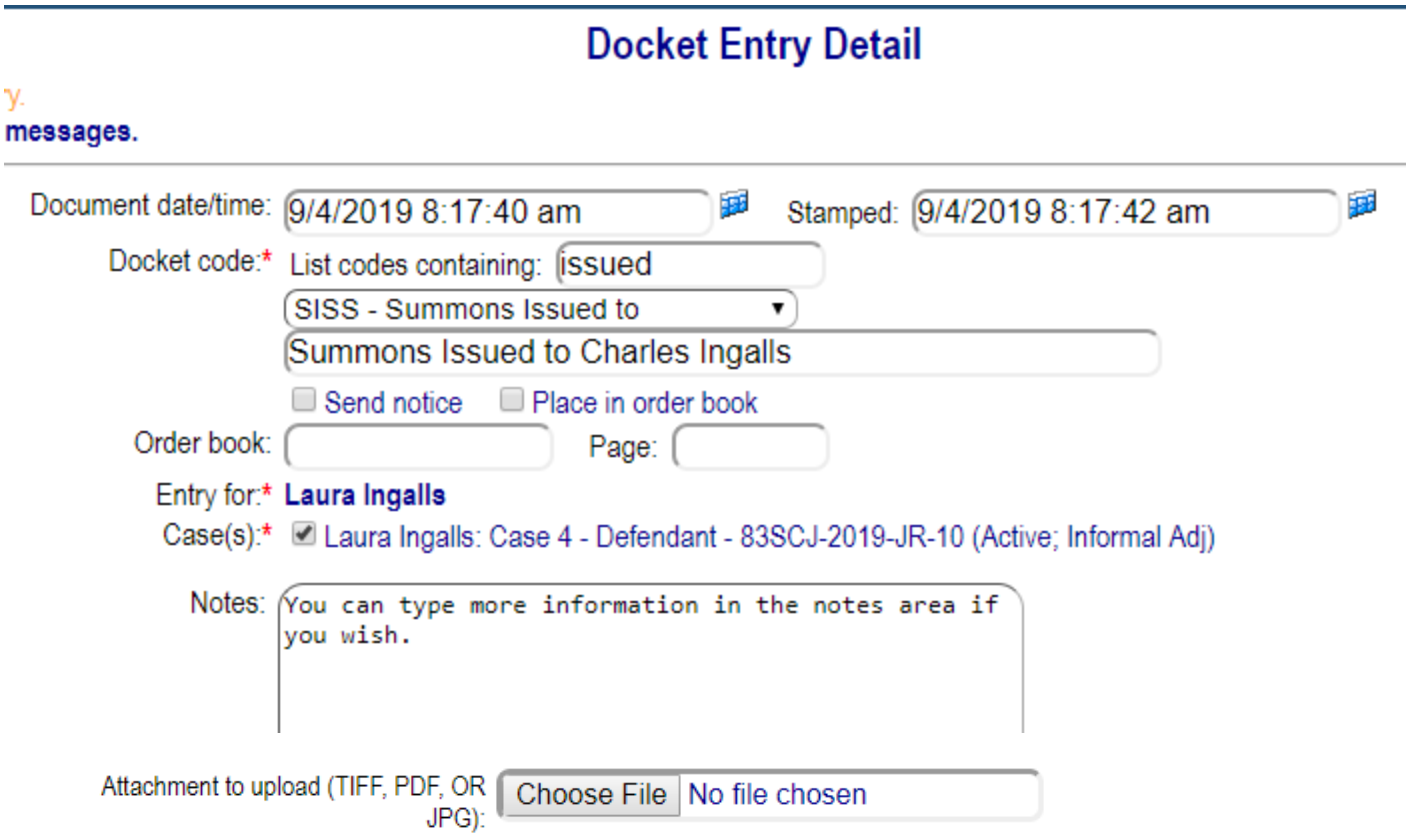
The child shall be placed under the supervision of the Sumner County Juvenile Court on unsupervised county juvenile probation

8/30/2019 7:53:32 AM(Filed) - Created 8/30/2019 7:53:26 AM - Petition for Delinquent/Unruly View

You are hereby commanded to summon the above addressee to appear before the Sumner County Juvenile Court, located at 225 E Main St, Gallatin, TN 37066 for

To add a docket entry

Docket entries used to be for documents filed with the clerk, but they can be used for anything. Docket entries don't update Quest in any way, they simply record something.



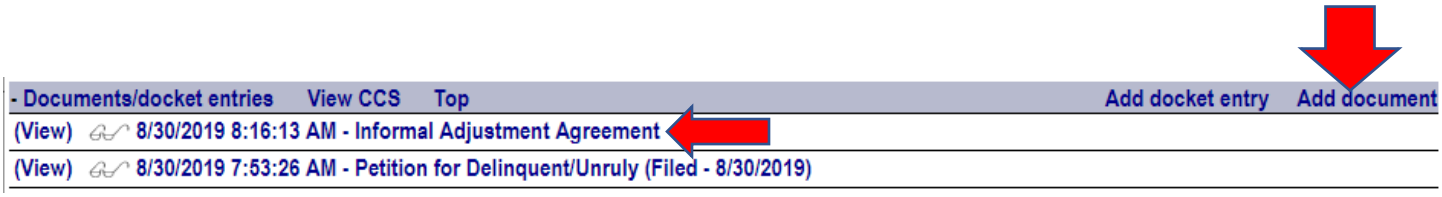
- **Document date/time**: Date and time of the docket entry. This is the date that will be displayed **List Documents** screen. Some jurisdictions can't back date documents. If that is the case the document date will always be the date you hit UPDATE.
- **Stamped**: This is the date of the file stamp on the document.
- **Docket code**:
    - **List codes containing**: Type in a partial word, press the TAB key, then click on the drop-down arrow on the next line. The list of available docket codes will only display codes with that partial word in the description.
    - You can change words on the next line if necessary.
- **Send notice**: If you want a copy of this entry to be mailed to the parties, check this. More about Notice.
- **Place in order book**: If this entry is an order that should be placed in the order book, check this.
- **Order Book**: This is automatically assigned by the system if **place in order book** is selected. More about order book.

- **Entry for**: Select the appropriate case to make this entry. You can select multiple cases if the entry is exactly the same.
- **Notes**: This is the body of the entry.
- **Attachment to upload**: If you have received a piece of paper that you are making an entry about, such as a written appearance by an attorney, you can scan that paper and attach it to the docket entry. Click the **Browse** button, find the document wherever it is stored, click on it to select it. The document must be saved as a .tiff or .pdf file format.

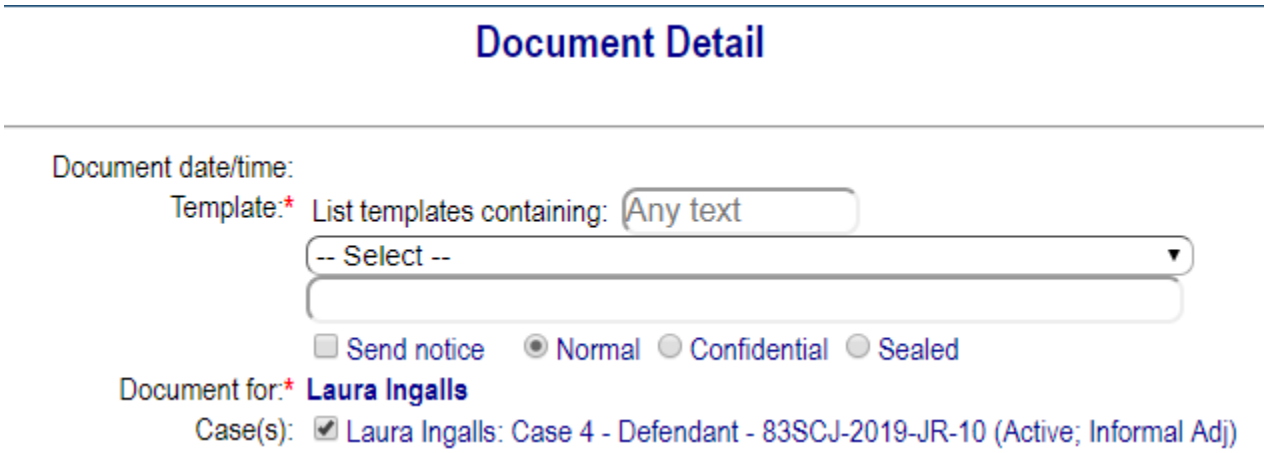
Click the **Update** button to save your work.

To Add a document

To add a new document, click the **Add** link at the end of the line. To edit a document, click on name of the document.



This brings you to the **Document Detail** screen.



- **Document date/time**: This will always be the current date and time. You can't back date documents.
- **Template**:
  - **List templates containing**: Every document that you are authorized to create is listed in the drop down in the line below. To narrow the search, you can type a keyword into the

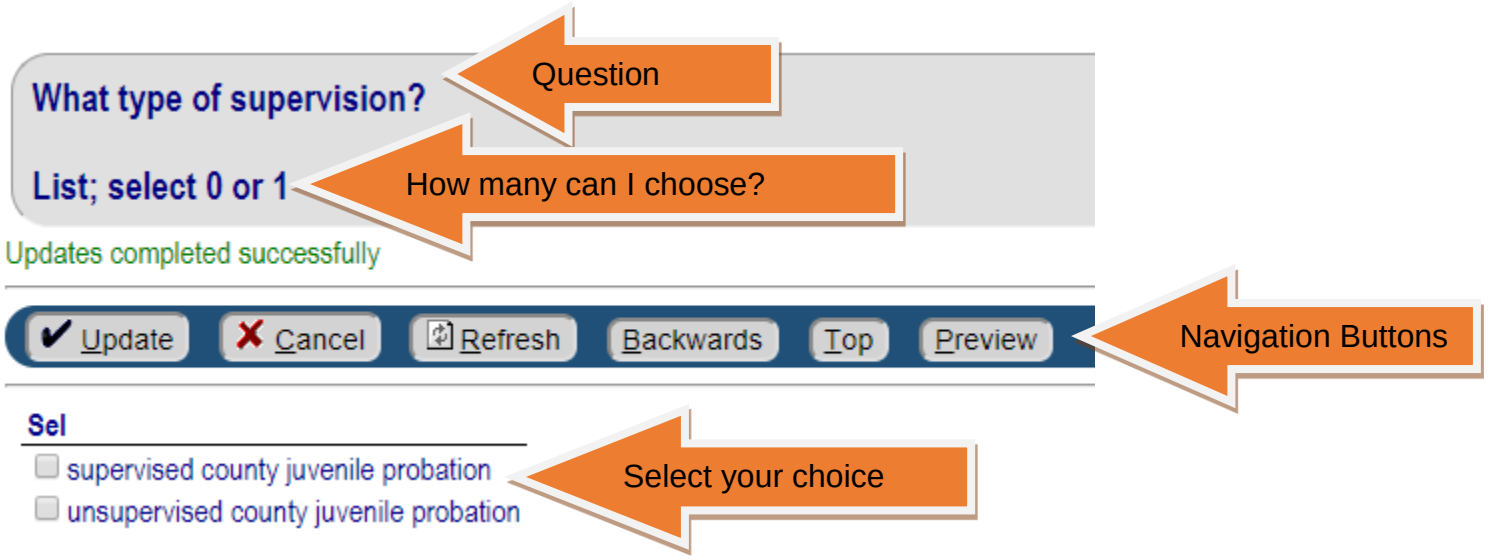
List templates containing field. For example, if you want to create a Petition, you can type in Petition, press the TAB key, and when you click on the drop-down arrow only those documents that contain the word petition will be displayed for you to choose.

- After you have selected a template, you can change the wording if you wish.

- **Send notice**: Selecting this is not necessary if you are using a Certificate of Service on your documents. The people you select in the certificate will receive notice as well as any Quest User assigned to the case with a Person Type set up to receive notice for documents.
- **Normal**: This is what is by default selected if confidential or sealed are not.
- **Confidential**: Selected this means this is a confidential document. Only those people authorized to view confidential documents will be able to see that this document exists.
- **Sealed**: Select if this is to be a sealed document. Only those people authorized to view sealed documents will be able to see that this document exists.
- **Document for**: You should click on every case to which this document should be attached.

Templates:

All templates work basically the same way. There are questions or instructions at the top of the screen. There may be a note telling you how many boxes you may select if there is a list of choices.



Template Navigation Buttons

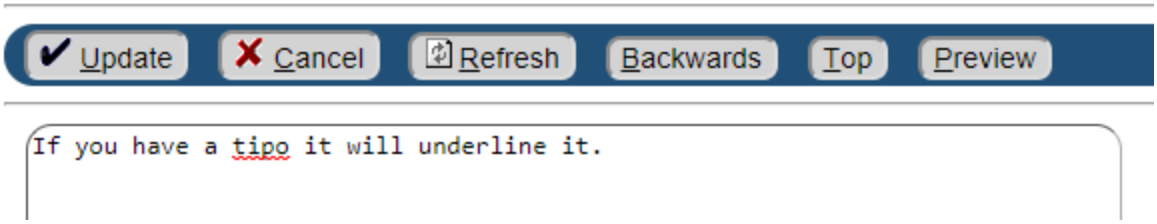
There are a set of buttons to help you navigate through the templates. A row of these buttons appear right below the questions and another row appears at the bottom of the page. They work the same; they are in two places because the size of the instructions at the top vary from question to question causing the top buttons to move up and down. The bottom row of buttons is always in the same location and some people find it easier to use them.

Remember you can always use the CONTROL key plus the underlined letter on the button rather than clicking on the button. You can also use your TAB key to move around the screen. When you have reached the area you wish to select, you can hit the space bar to put a check in the selection box, or you can use the ENTER key to select the button your cursor is on.

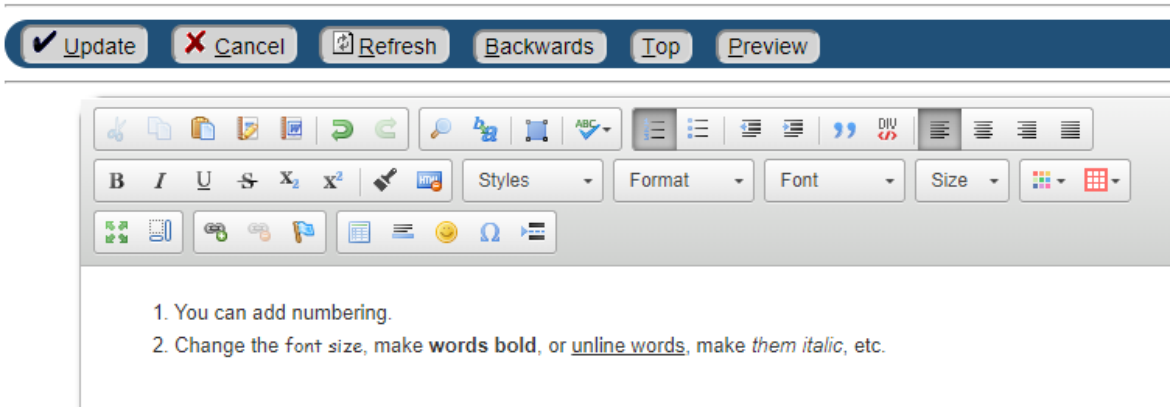
- **Update**: Moves you forward through the questions and saves your answers.
- **Cancel**: Will take you out of the document, leaving it incomplete for you to work on later.
- **Refresh**: Will erase everything you have typed or clicked on the screen.
- **Backward**: Moves you backwards through the questions.
- **Top**: Takes you to the very top of the document questions or the very first question.
- **Preview**: Allows you to view the document to see what you have so far. It is HIGHLY recommended that if you are in a large document you preview frequently. If you have many questions and you don't preview and you get to the end and find you have a typo or error on a question near the top, you will have to press the BACKWARD button many times to get back to that question to fix the problem, then UPDATE forward to get back to where you were.
- **Finish**: The finish button appears when you have reached the end of the document. Once you hit the finish button, the document is completed, and you may not be able to edit it.

Text boxes

Text boxes are free typing areas. You can type as much text as you wish.



There are two types of text boxes, one is just a regular text box with no formatting options. If you want to have formatting options, you need what is called an html text box.

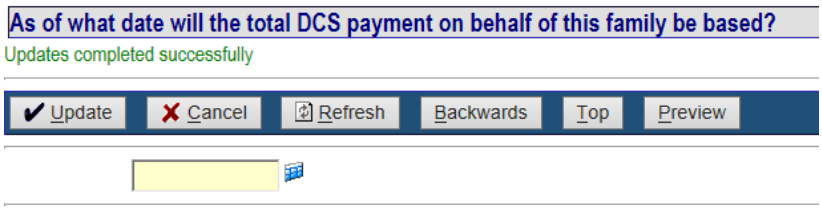


Nothing you type is saved until you press the **Update** or **Backwards** button. If you happen to leave your desk or answer a phone call and you are logged out of the system due to inactivity, anything that is typed on your screen that has not been saved will be lost. You can periodically click the **Update** button to save your work, then click the **Backwards** button to return to that screen to continue typing.

Date fields

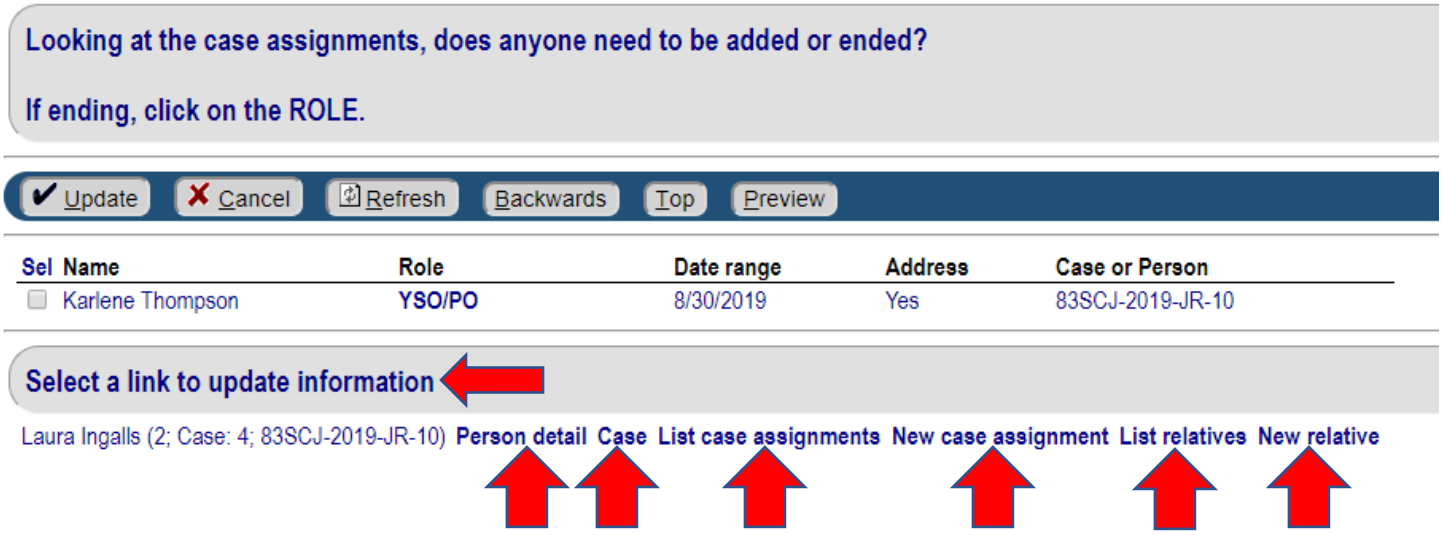
Some date fields will default to today's date.

Just like any date field in Quest, you can click on the blue calendar at the end of the field and choose a date. You can type in a date m/d/yr. You can type a T for today's date, then use the – to go backward one day at a time or the + to go forward one day at a time.

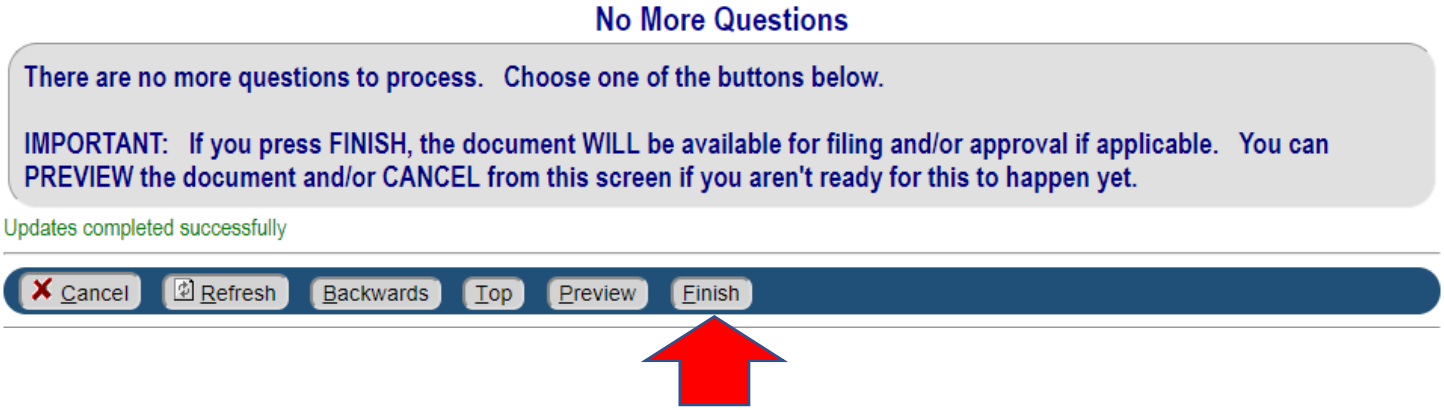


Select a link to update information

Some questions will have a helpful link section so if the answer you wish to select isn't available, you can quickly add it.

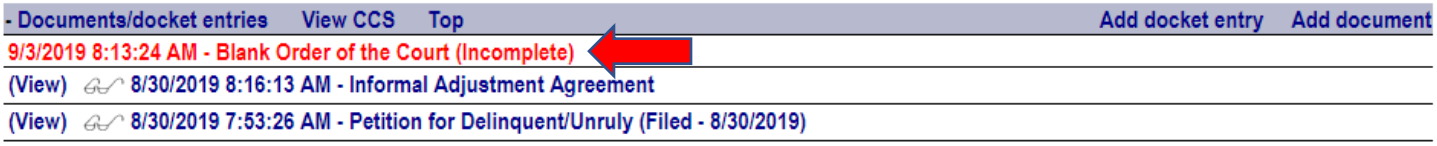


When you have reached the end of the document you will see a **Finish** button. When you have previewed and are satisfied that everything is correct, you should press the **Finish** button. At any point in a document, if you need to stop and work on the document later, you can hit the **Cancel** button. This will leave your document incomplete.



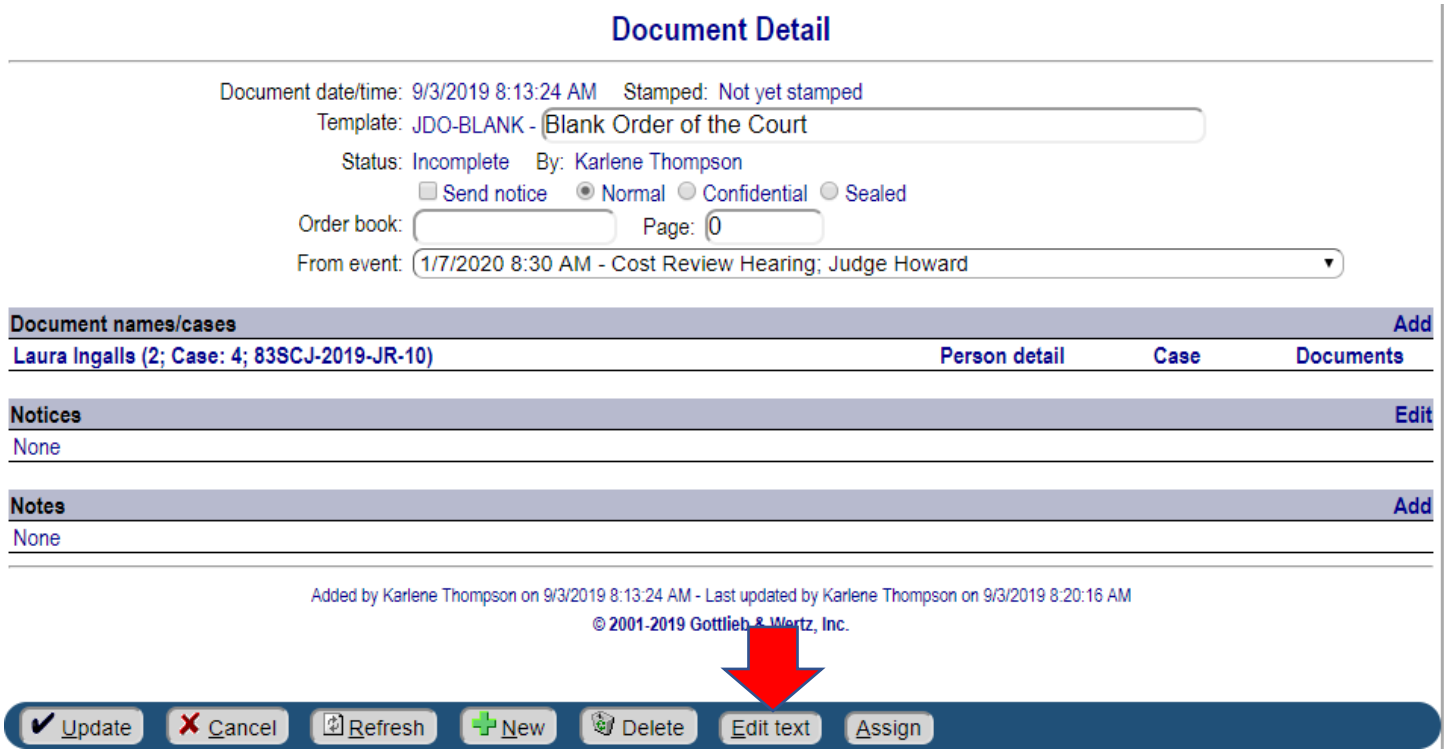
To work on an incomplete document

To continue working on a document that is incomplete, click on the name of the incomplete document and you will be taken to the **Document Detail** screen.



Once inside the **Document Detail** screen, you can click on the **Edit Text** button, and you will be taken back into the document in the exact location you were in when you hit the **Cancel** button.

Every Monday, if not more frequently, you will receive a Quest message that informs you a document is incomplete and will be deleted on a specific date. Incomplete documents are normally kept for 30 days before they are deleted. To give yourself another 30 days, simply edit the document.



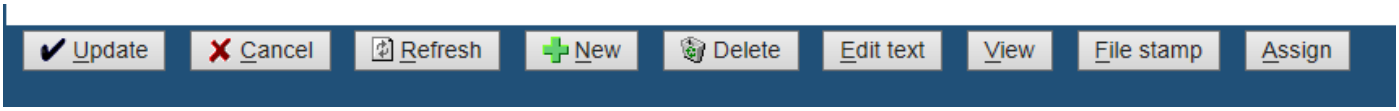
The Document Detail screen

The document detail screen shows you all the details of a document and allows you to work with that document.

- **Document date/time:** The date and time the document was created, until it is finished then it displays that date and time.
- **Stamped:** The date of the file stamp, or the words “not yet stamped”.
- **Template:** Shows the template that was used for this document.
- **Status:** Shows the current status of the document.
  - **Incomplete** - If a document is incomplete, you can edit it.
  - **Complete** - If a document is complete you can edit it until midnight or until it is file stamped.
  - **Locked** - If a document is locked, you must change the status to incomplete before you can work with that document. If a person is currently working inside a document, the status will be locked.
- **By:** Shows the person who made the status what it currently is.
- **Send notice:** N/A if you are using a Certificate of Service on your documents.
- **Normal**: Means the document is not sealed or confidential.
- **Confidential**: Only those people authorized to view confidential documents can even see this document exists.
- **Sealed:** If this document is ordered sealed, this can be selected, so that only those people authorized to view sealed documents can even see this document exists.
- **Approval status:** This tells you the current approval status of this document. Options are: Needs Approval, Approved, Exception Filed, Not Approved, Under Advisement.

- **Date and by:** The date and time of the approval status and the person who changed the approval status.
- **Order book and page:** If this document is an order it will go into an on-line Order or Minute Book once approved. This is the book and page from the Order book. See more about Order Book.

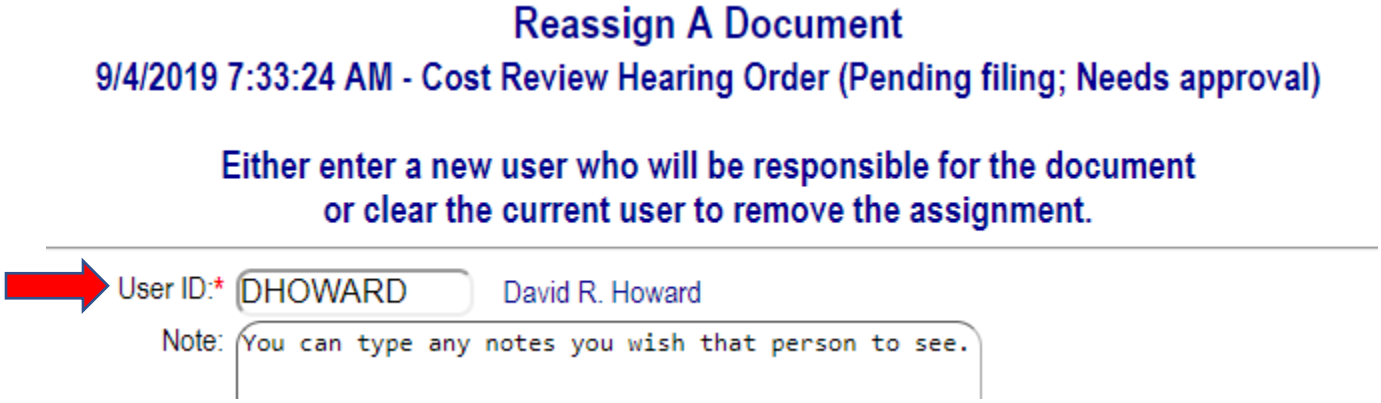
Document Detail Buttons



- **Update:** Your save and continue button.
- **Cancel:** Takes you to the screen you were on before.
- **Refresh:** Will erase everything you have typed or clicked on the screen.
- **New:** Is a COPY button. It will give you a new document and copy all the responses from this document.
- **Delete:** Will delete the document, if pressed twice.
- **Edit Text:** Will put you back inside an incomplete document so you can continue working on it.
- **View:** Lets you view the document. This button is only available if the document has a status of complete.
- **File stamp:** Will allow you to file stamp a completed document. Is only available on document coded to need a file stamp.
- **Assign:** Will let you assign this document to someone.

To Assign a document

You may want to assign a document to a supervisor to review, or to another person to sign the document, or to a judicial officer to approve or review. To assign a document to someone, click the name of the document to get into the **Document Detail** Screen then click the **Assign** button.



Type in the Quest User ID of the person to whom you wish to assign the document and any notes.

Click the **Update** button to save your work.

The Notes section of the **Document Detail** screen will reflect the date and time the document was assigned.

This document will not appear on that person's **List of Documents Assigned** screen.

See more about Document Assignments.

To File Stamp a document

Once a document has been FINISHED it is available to be file stamped, if required. Click the File Stamp button at the bottom of the screen. When you View the document, the File Stamp will be displayed. If you wish to print a File Stamped document with the file stamp on it, you must select to print header s with your browser. Some browsers allow you to print specific headers and footers, some do not.

[See more about printing headers and footers]

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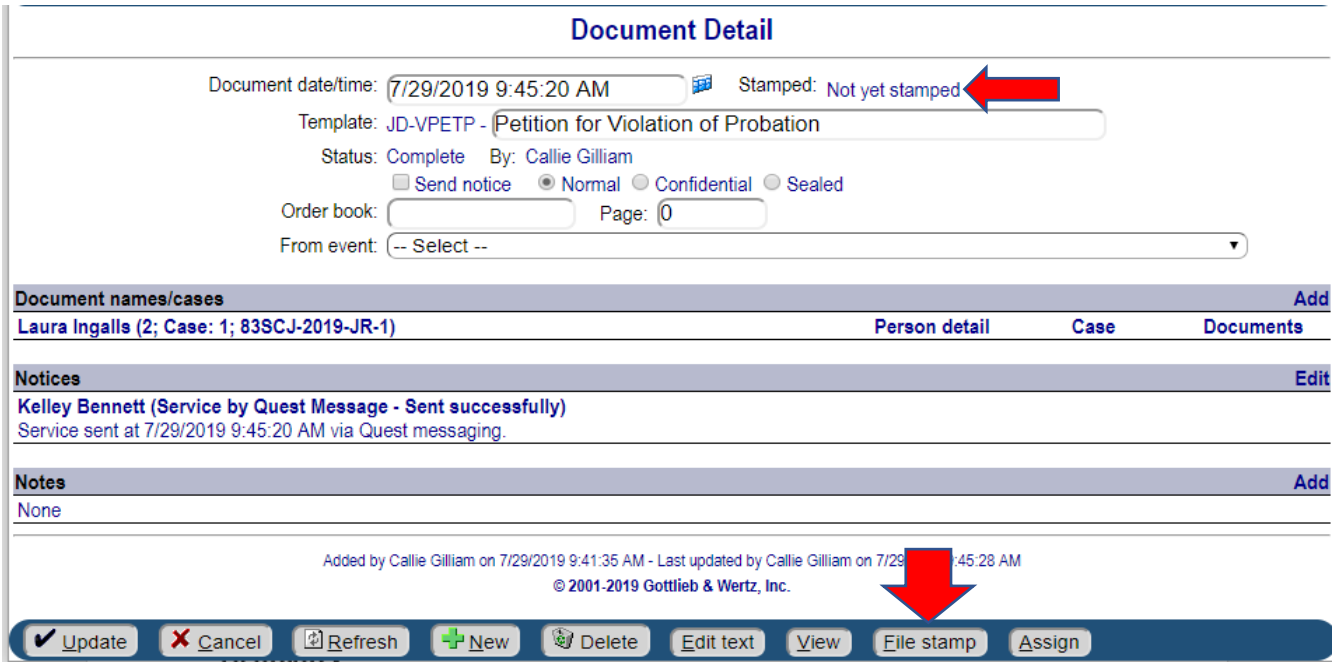
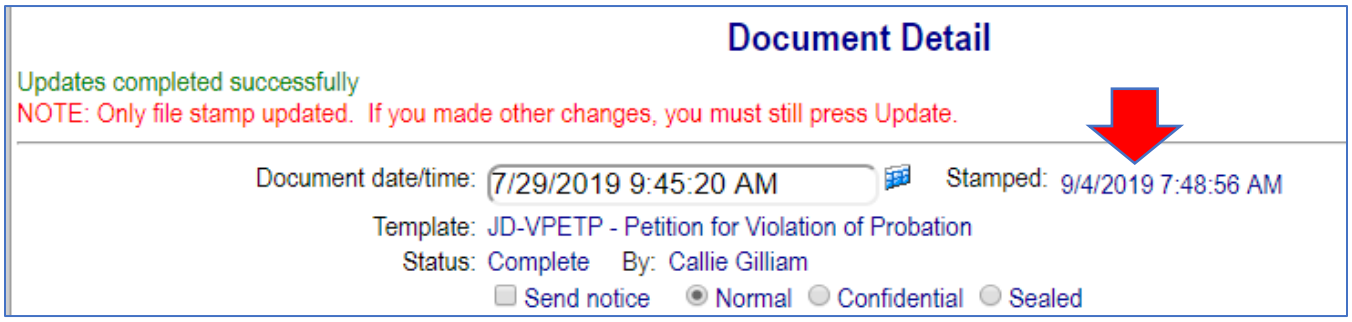
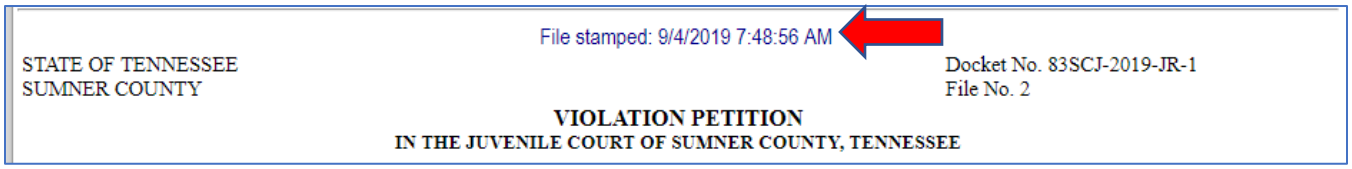






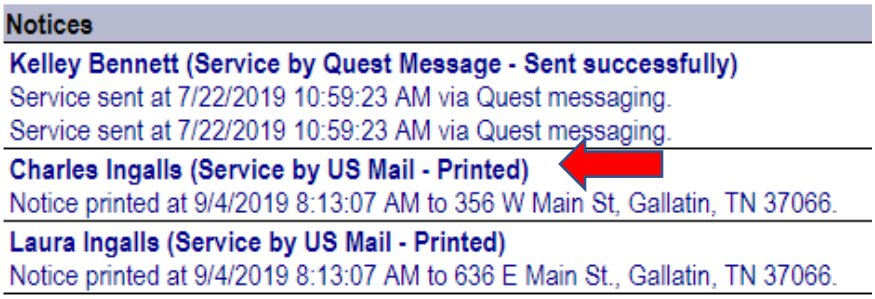
Document names/cases

This will show every person and case this document is linked to. Documents can be linked to multiple people and cases. This section provides quick links to the **Person Detail** screen, the **Case Detail** screen, and the **List Documents** screen.

To add or remove a name from a document requires Administrator authority.

Notices

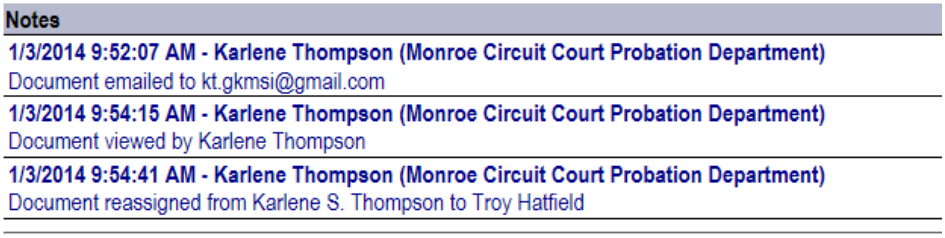
When has a wonderful batch processing feature in Quest that will automatically notify the parties by Quest messaging, email or U.S. mail. Once the report “print pending notices” has been run, it will update the Notices section



See more about Print Pending Notices.

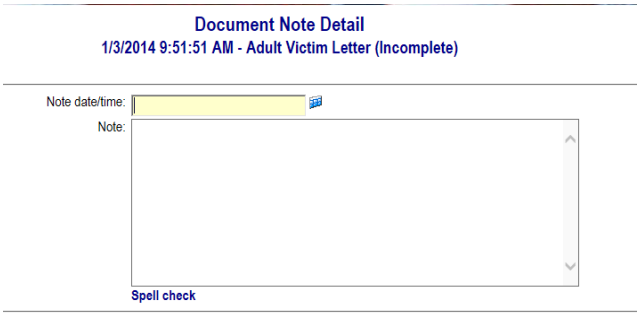
Notes

The notes section allows you to make notes about the document if you wish, but the system automatically makes notes as well.



If a document is emailed or faxed, a note is automatically generated.
If a document is assigned to a person, it records that.
When the person the document is assigned to Views the document, a note is generated.
If the document is reassigned to another person, a note is generated.

To add a Note:



- **Note date/time:** Enter the date and time of the note.
- **Notes:** Type the note.

Click the **Update** button to save your work.

To Sign a Document

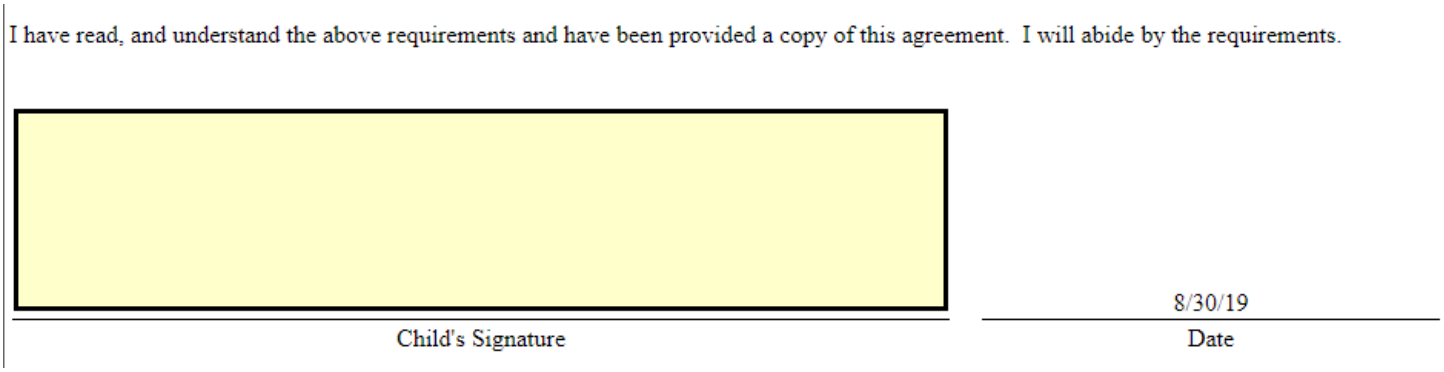
There are several ways to sign a document.

Finish the document and View it

If you have a Petitioner or family who needs to sign a document, after you have FINISHED the document and you are viewing it, there are several buttons at the bottom of the screen. Click the **Sign** button to sign the document.

This will bring up the first spot in the document where a signature can be captured. The child should sign on a signature pad or using a touch screen computer.

Once the child has signed, click the **Update** button to save that signature.



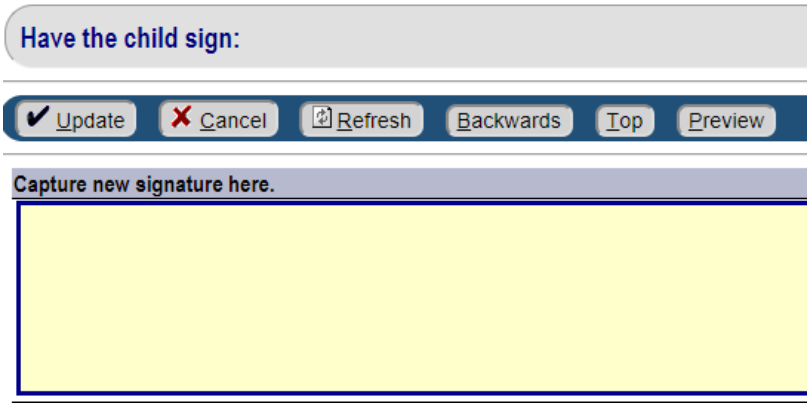
If there is another signature required, click the **Sign** button again and walk through this signature process as many times as necessary to capture all signatures.

Capture the Signature as you create the document

If you have several documents that need signed, for example if a child is being detained and you are walking through the detention paperwork, it may be easier to have the child sign the papers as you are creating them rather than wait until the end.

This will cause the signature block to appear as a prompt in the document.

You have the child sign, click the **Update** button to save the signature, and continue answering questions in the document.



There are many other ways to have Quest User signatures put on documents.