CountySuite: Court of Common Pleas

How-to Guide

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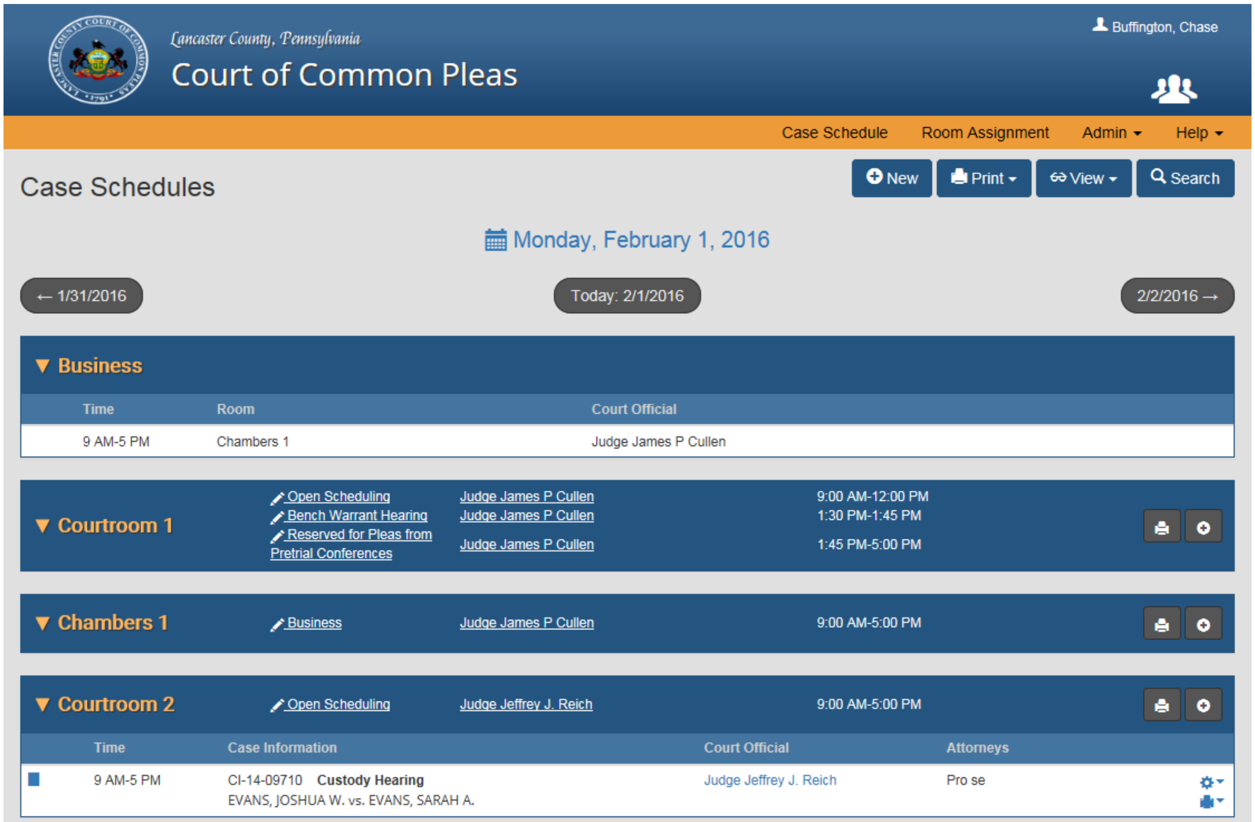
CountySuite Court of Common Pleas Home Page

The Case Schedules screen is the home screen of the application. The user can always return to this screen by either selecting the “Case Schedule” link in the upper right on any screen, or by selecting the county’s Logo in the page header.



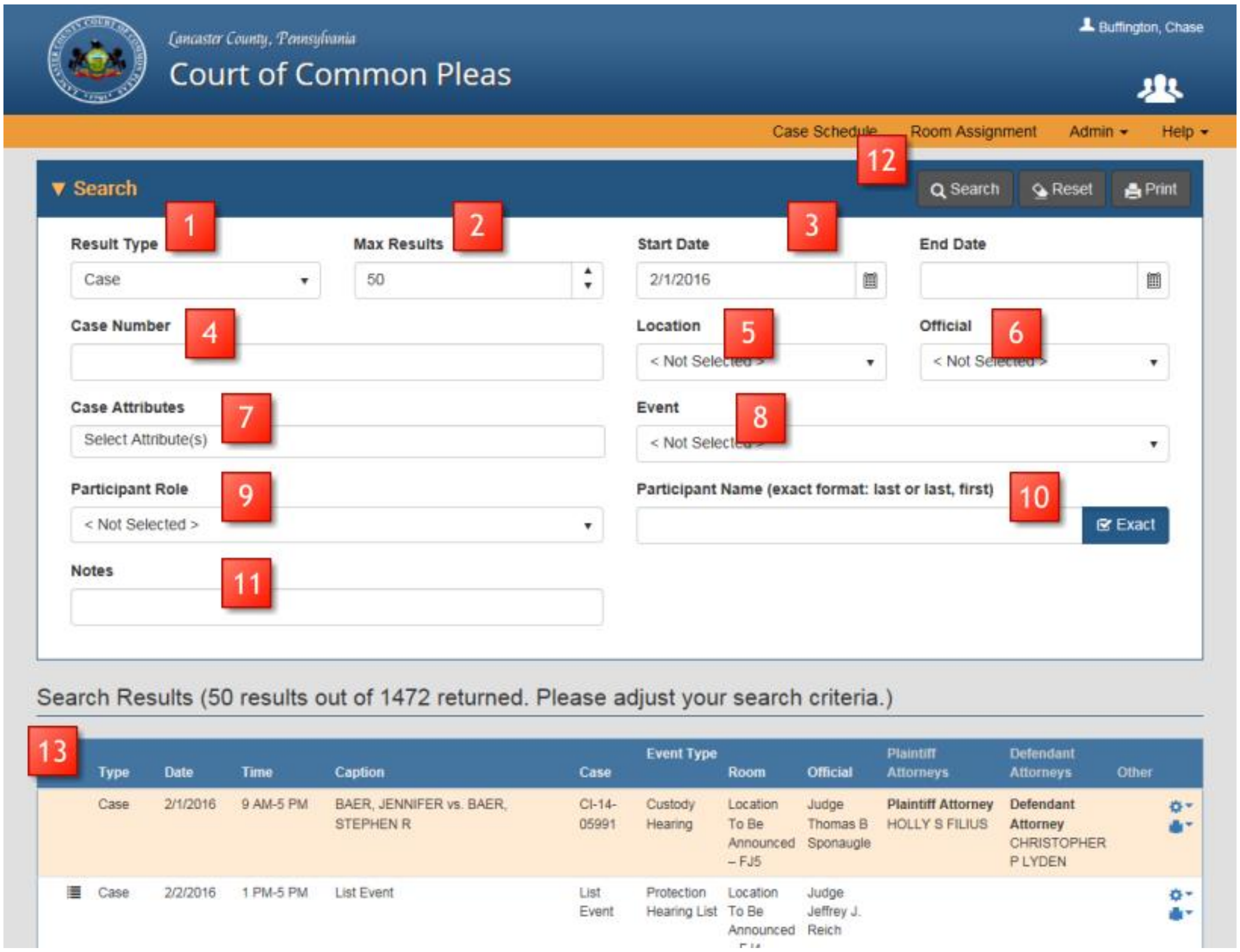
- The default schedule date is today’s date. Click on the date at the top of the screen to select another schedule date, or click on the buttons on the left and right of the screen to navigate to yesterday or tomorrow, respectively.
- Print the displayed schedule by clicking the Print button at the top of the screen.
  - From the drop down menu, select “All” to print the entire schedule, “All – Lists Collapsed” to print the schedule with list events collapsed, or “Rooms Only” to print only the room assignments.
- To print the events for a particular room, click the button on the room line. To print an individual event, click the button on the event line.

- Change the schedule view by clicking the View button at the top of the screen.

From the drop down menu, select “All” to view the entire schedule with list events expanded, “All – Lists Collapsed” to view the schedule with list events collapsed, or “Rooms Only” to view only the room assignments.

How to Search for Case Events

From the Case Schedules screen, select the Search button. The Search screen will now be displayed.



Step-by-step

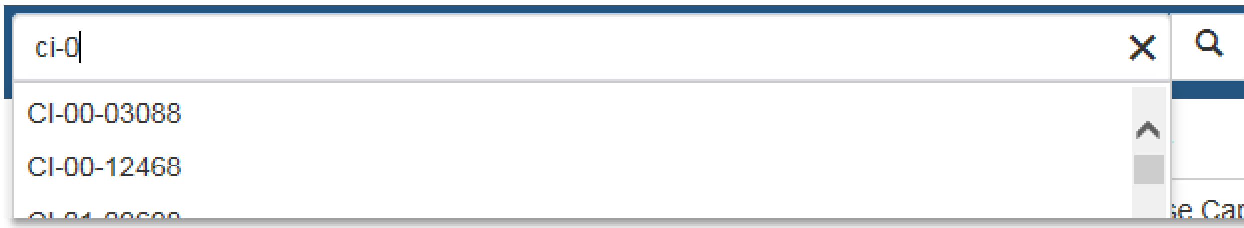
1. Select the Result Type to be searched by: Case, Room Assignment, List, or All types. The available search options will change depending upon the Result Type selected.

2. Set the maximum number of search results to be displayed in the results grid. If there are more results than the maximum number, then a message will be displayed showing the total number of available results and a suggestion to narrow the search criteria.

3. Set the Start and End dates as the range within which the search is to occur. Please note that if the Start Date box is left blank, the search will default to starting on today's date.

4. Enter all or part of the Case Number into the search box.

    - The type-ahead feature will return suggestions for Case Numbers as characters are entered:



    - If available, the results for Civil cases are pulled from CountySuite: Civil Court, while the Criminal cases are based upon CPCMS.

5. Select the Location in which the event takes place.

6. Select the Official presiding over the event.

7. Select the Case Attribute(s) associate with the Case Event: Confidential, Telephonic, Video, Interpreter, Lancaster County Prison, State Prison, Other Prison

8. Select the Event Type. The type-ahead feature will return suggestions as characters are entered.

9. Select the Participant Role (ex. Plaintiff, Defendant Attorney, Probation Officer, etc.). This search option is used in conjunction with Participant Name.

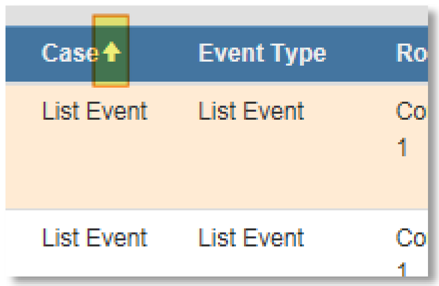
10. Enter the Participant's Name. Checking Exact will enable the exact name match functionality. With this selected, entering either the "Last Name" only, or "Last Name, First Name", will display results that match exactly to the text as entered. With Exact unchecked, the search results will be more broadly based upon partial matches to the entered text.

11. Enter text into the Notes box to search within Case Event notes.

12. Once the desired search criteria has been entered, select Search to perform the search, or Reset to remove the criteria. To print the search results, select Print.

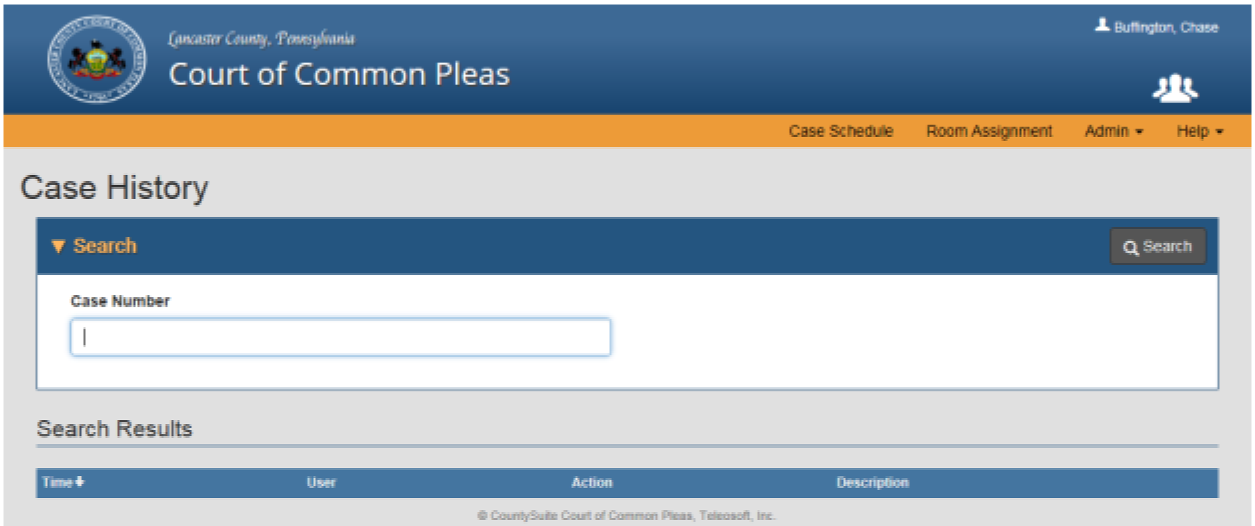
13. The Search Results grid will display a list of Case Schedule Events based upon the entered criteria.

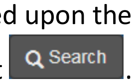
    - To re-order the list of results, select the desired column heading. Selecting a heading multiple times will toggle ascending and descending order:

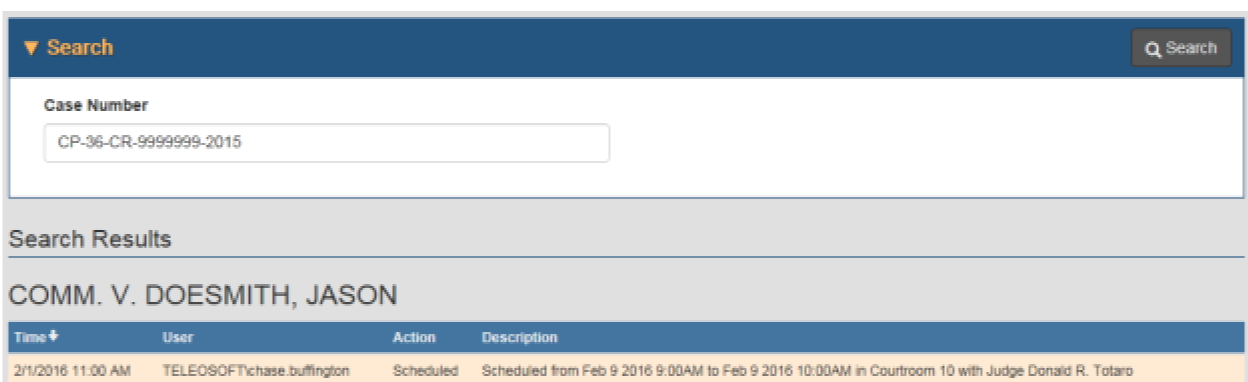


How to Search Case History

From the Case Schedule screen, select the Admin drop down menu, then select **Case History**. The Case History screen will be displayed.



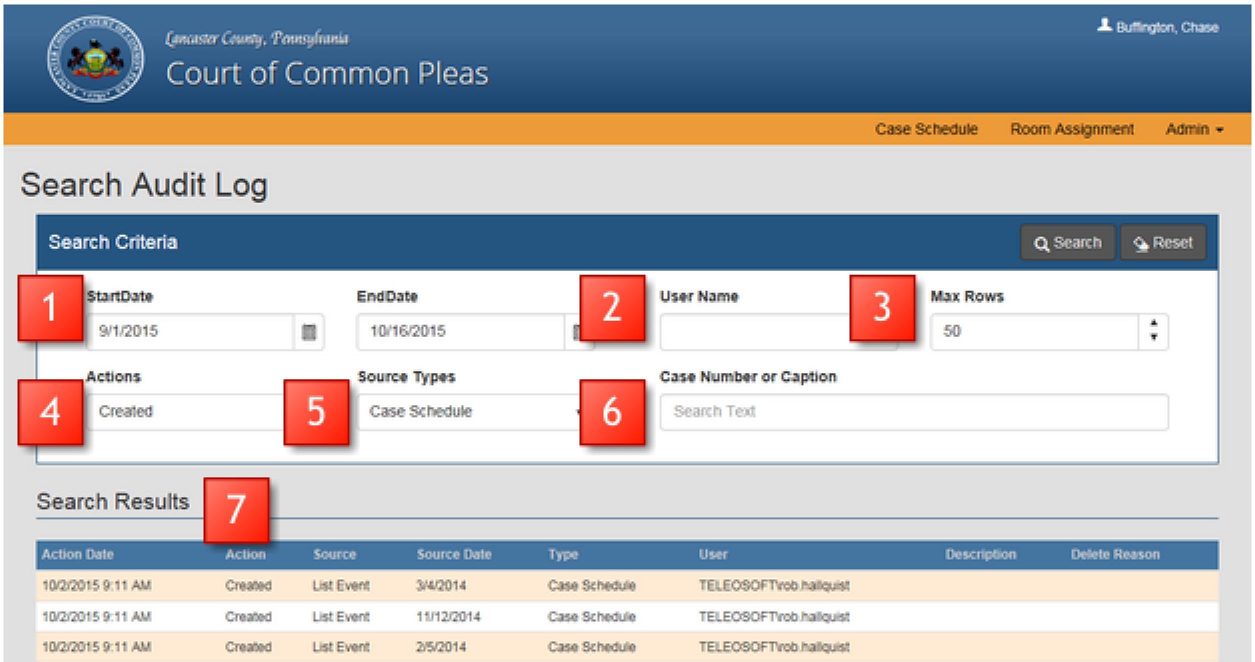
- Enter all or a part of the case number into the Search box. The type-ahead feature will return suggestions based upon the characters entered. Select the desired Case Number and press <Enter> or select 
.



- The search results will display historical information related to the case number that matches the search text, including the Time of the action, the User that performed the action, the Action taken, and a brief description of the action.

How to Search the Audit Log

From the Case Schedule screen, select the Admin drop down menu, then select **Audit Log**. The Audit Log screen will be displayed.



Step-by-step

1. Select the Start and End dates to narrow the search results within a specific date range.

2. Enter all or part of a user name to find Actions taken by particular users.

3. Limit the maximum number of rows returned in the search results.

4. Filter the results by the type of Action.

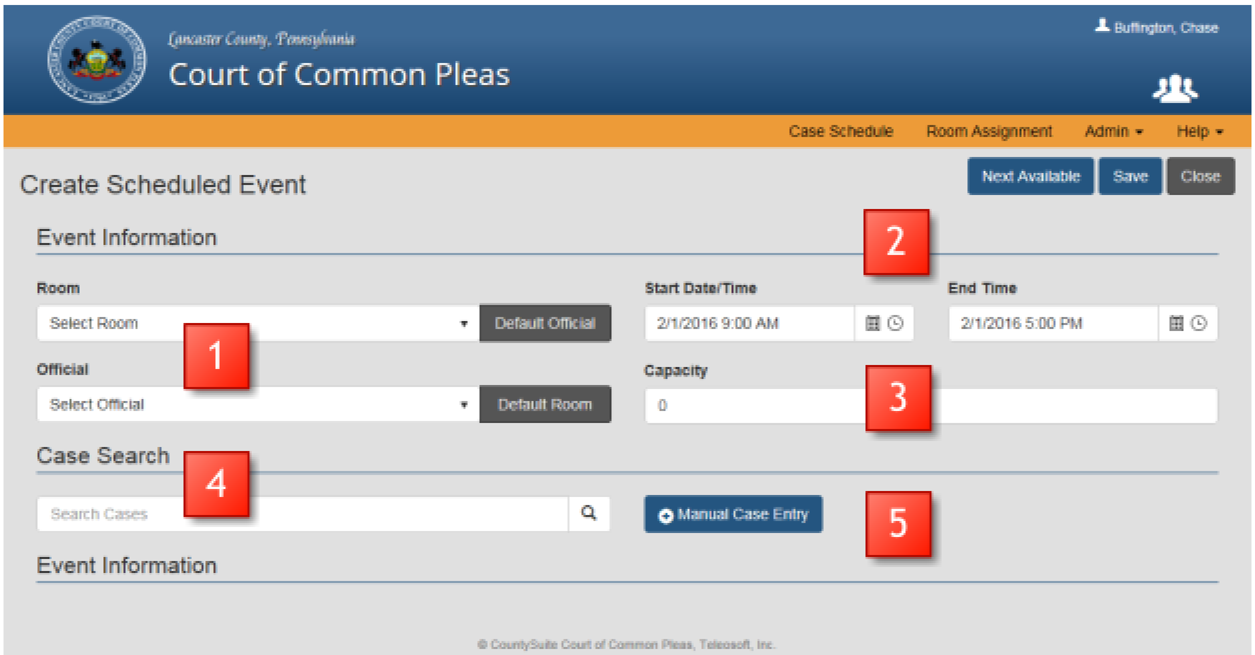
5. Select the Source Type where the Actions were taken.

6. Enter all or part of the Case Number or Caption text to include in the search results.

7. The Search Results grid displays historical data by Action Date, Action, Source, Source Date, Type, User, Description, and Delete Reason, if applicable.

How to Create a Scheduled Event

From the Case Schedules screen, select either the New button at the top of the screen or the button for a particular listed Room. The Create Scheduled Event screen will be displayed.



Step-by-step

1. Select the Room and Official for the Event from the drop down menus (these will already be set if the button was selected on the Case Schedules screen). Selecting Default Official or Default Room will display the associated Official and Room, respectively (if applicable).

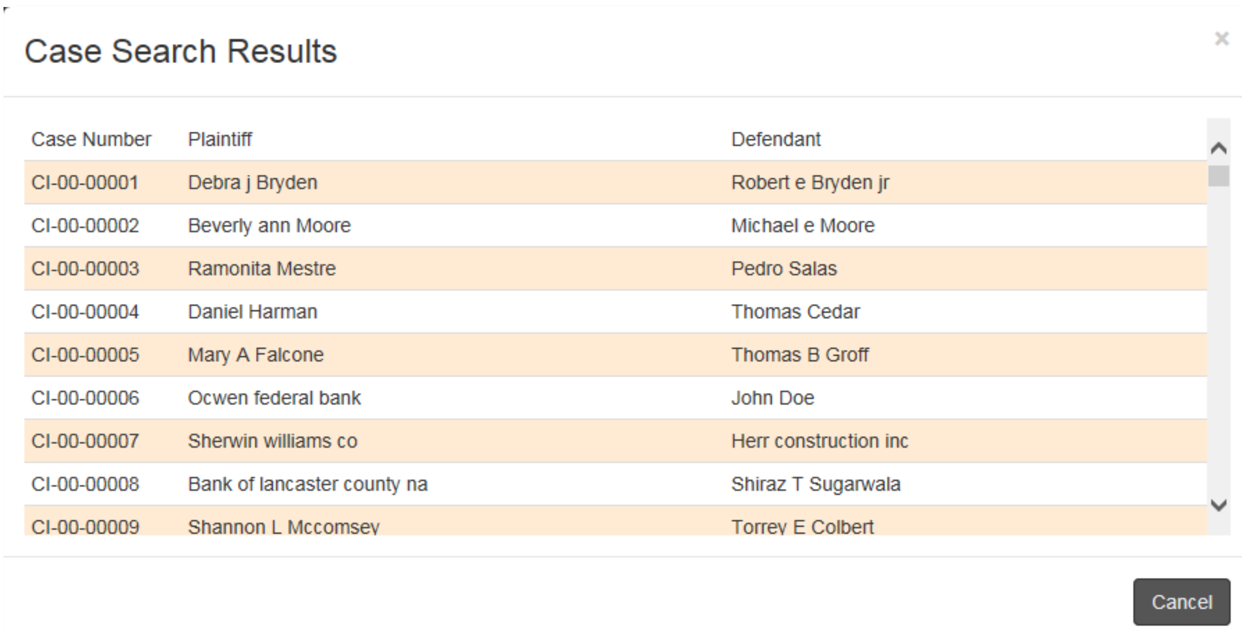
2. Enter the Event Start Date/Time and End Time by either typing the date into the text field or by selecting the and icons and then selecting the date from the calendar and the time from the drop down menu.

    - Entering an End Date greater than the Start Date will display the Weekly section for recurring events:

- Check the days on which the event should occur on a weekly basis, within the specified date range.
- To find the Next Available date for scheduling, see the section on How to Select the Next Available Date.

3. To schedule openings for multiple cases during a time block (called a **List Event**), set the **Capacity** to a number greater than 0.

4. To search for an existing Case, enter the Case Number into the Case Search box and press <Enter> or select . A list of Cases matching the entered text will be displayed.


Case Search Results

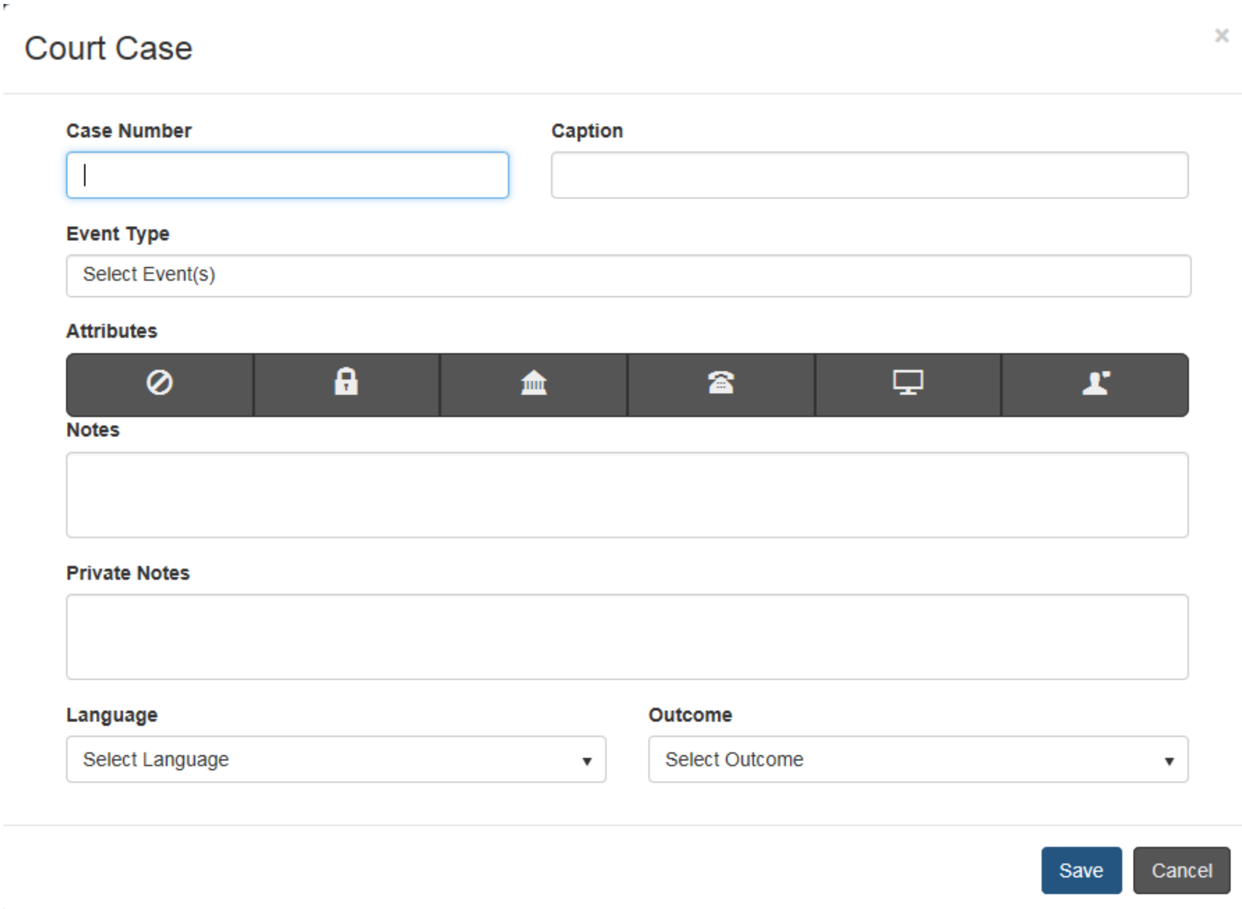
Case Number	Plaintiff	Defendant
CI-00-00001	Debra j Bryden	Robert e Bryden jr
CI-00-00002	Beverly ann Moore	Michael e Moore
CI-00-00003	Ramonita Mestre	Pedro Salas
CI-00-00004	Daniel Harman	Thomas Cedar
CI-00-00005	Mary A Falcone	Thomas B Groff
CI-00-00006	Ocwen federal bank	John Doe
CI-00-00007	Sherwin williams co	Herr construction inc
CI-00-00008	Bank of lancaster county na	Shiraz T Sugarwala
CI-00-00009	Shannon L Mccomsey	Torrey E Colbert

- Select the grid line of the desired Case.

- The Court Case dialog box will display, allowing the user to enter the Caption, the Event Category, the Event Type, the Case Event Attributes, the Notes (both public and private), the Language, and the Outcome.

- Select Save.

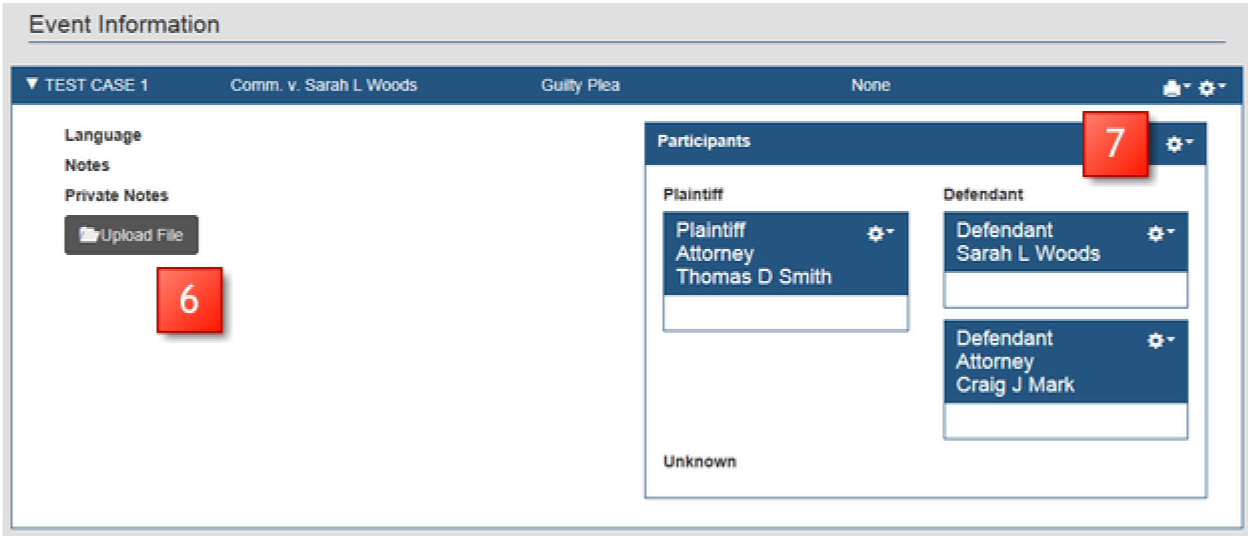
5. To manually add a case to the Event, select the Manual Case Entry button.

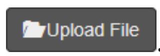


- The Court Case dialog box will allow the user to enter the Case Number, a Caption, Event Category, Event Type, Case Event Attributes, Notes (both public and private), Language, and Outcome.

- Select 

.



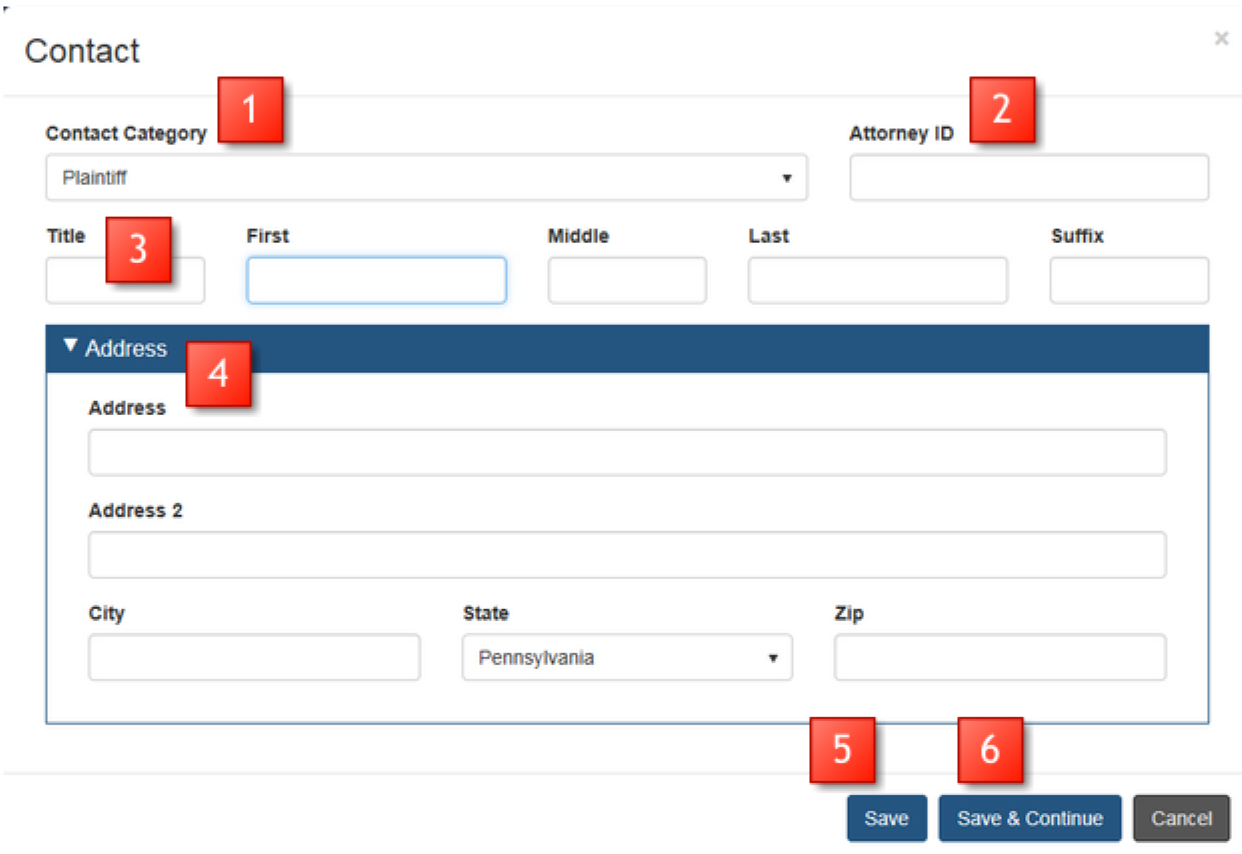
6. To attach a file to the Event, select .

7. To add Case Participants, see the section on How to Add Case Participants.

8. Select  to save the Scheduled Event.

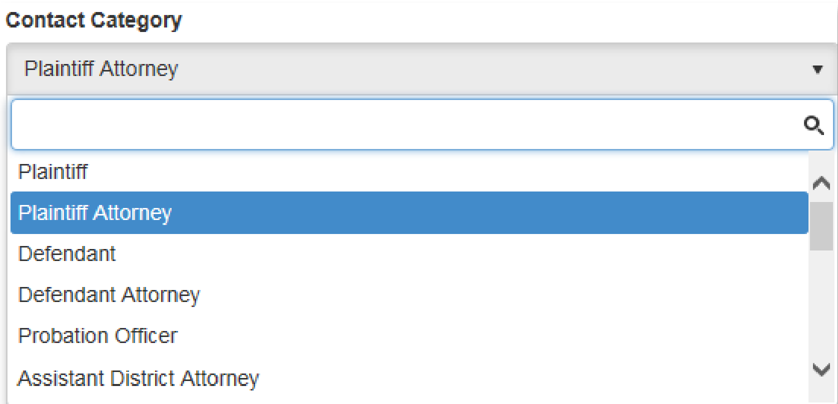
How to Add Case Participants

From the Create Scheduled Event screen, select the button in the Participants section of the Event Information, and then New from the drop down.



Step-by-step

1. Select the Category for the Contact.



2. Enter the Attorney ID, if applicable.

3. Enter the Contact's name.

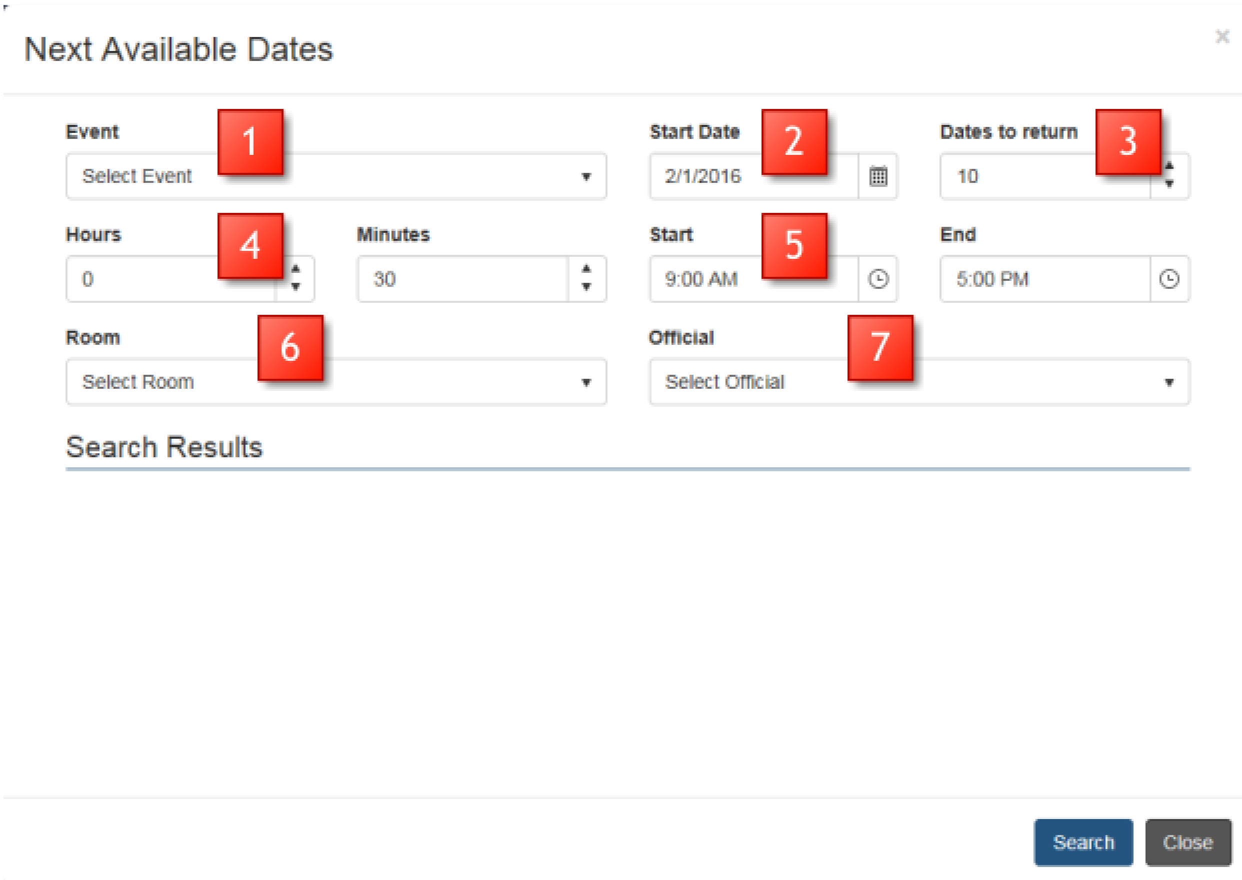
4. Enter the Contact's address.

5. Select **Save** to save the Contact information and close the dialog box.

6. Select **Save & Continue** to save the Contact information and clear the dialog box to enter a new Contact.

How to Select the Next Available Date

From the Create Scheduled Event screen, select Next Available at the top of the screen.



Step-by-step

1. Choose the Event Type.

2. Choose the date from which to Start the search.

3. Choose the number of dates to return in the search results.

4. Choose the block of time in hours and minutes.

5. Choose the time of day.

- Note: Entering the Hours and/or Minutes will cause the Start and End times to act as a time range within which the application will search for the block of time. If Hours and Minutes are set to 0, then the Start and End time will act as a single open block of time (ex. For an all-day opening, set the Hours and Minutes to 0, and then set the Start time to 9 AM and the End time to 5 PM)

6. Choose the room to check for availability.

7. Choose the Official.

8. Select Search.

The Search Results will show schedule availability by Date, Room, Official, Event, and Times. Select the drop down under the Times column, the desired time block, and then Select.

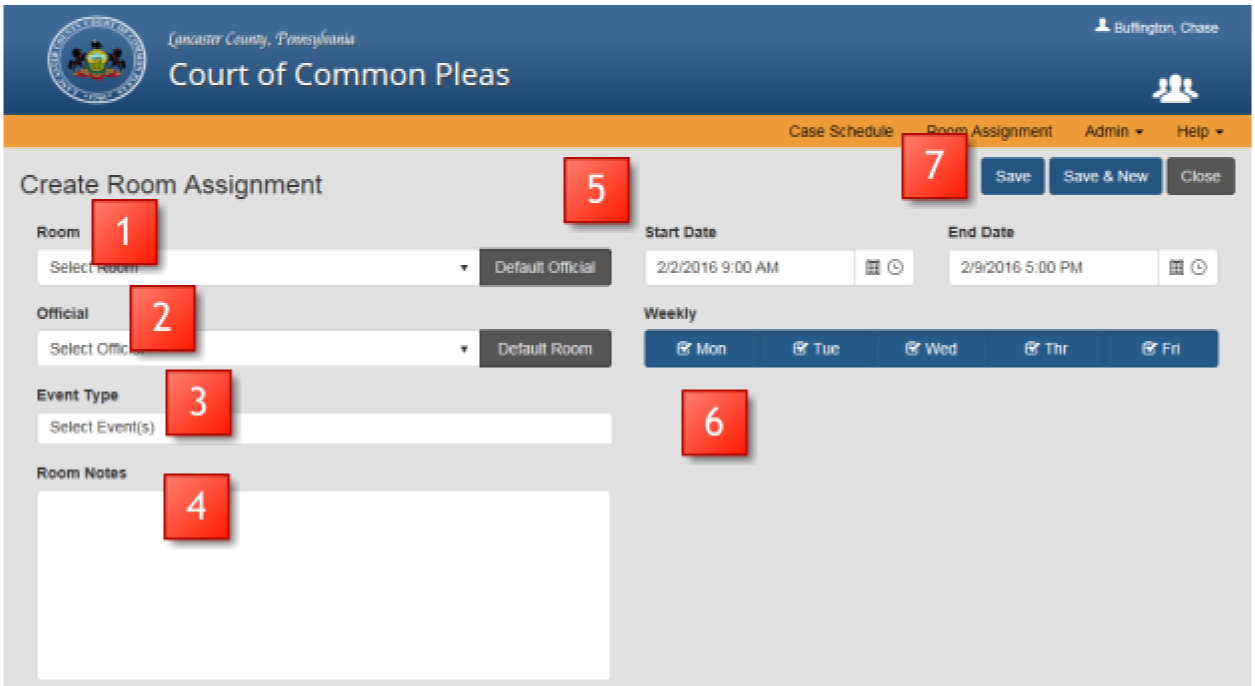

Search Results

Date	Room	Official	Event	Times	
2/2/2016	Courtroom 3	Howard F Knisely	Criminal Trials	9:00 AM - 9:30 AM	Select
2/2/2016	Courtroom 7	Christopher A. Hackman	Family Business Court - Letters Q, R, & So	9:00 AM - 9:30 AM	Select
2/2/2016	Courtroom 8	Dennis E Reinaker	Video Hearings	9:00 AM - 9:30 AM	Select
2/2/2016	Courtroom 12	David L Ashworth	Criminal Trials	9:00 AM - 9:30 AM	Select

The selected values will then be automatically populated on the Create Scheduled Event screen.

How to Create a Room Assignment

From the Room Assignment screen, select either the New button at the top of the screen or the button for a particular listed Room.



Step-by-step

1. On the Create Room Assignment screen, select the Room from the drop down menu (this will already be set if the button was selected on the Room Assignment screen).

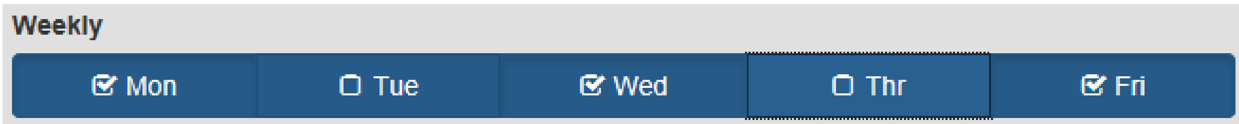
2. Select the Official from the drop down menu.

3. Select the Event Type from the drop down menus. Additional Event Types can be added by clicking on the Event Type bar and selecting from the drop down menu.

4. Enter any notes regarding the Room Assignment in the Room Notes field.

5. Enter the Event start and End dates by either typing the date into the text field or by selecting the and icons and then selecting the date from the calendar and the time from the drop down menu.

6. To create a recurring Event, select a Start date and a different End date. A grid will appear, showing the days of the week on which the Event will occur. Add or remove days by selecting the checkboxes:

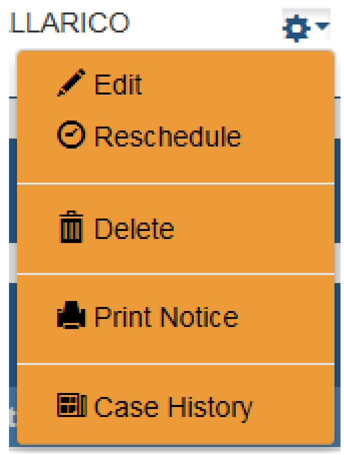


  - The Event will now occur on the selected days of the week, between the specified start and end dates.

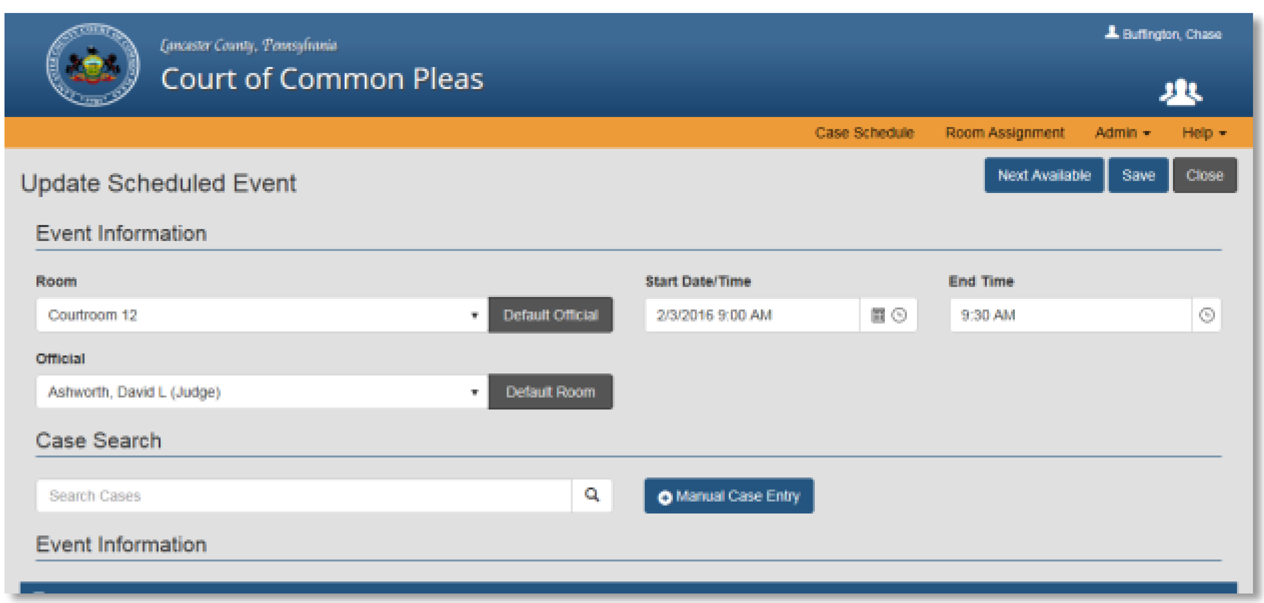
7. Select Save to save the Room Assignment, or Save & New to save the current Room Assignment and clear all information except for the dates.

How to Modify a Scheduled Event

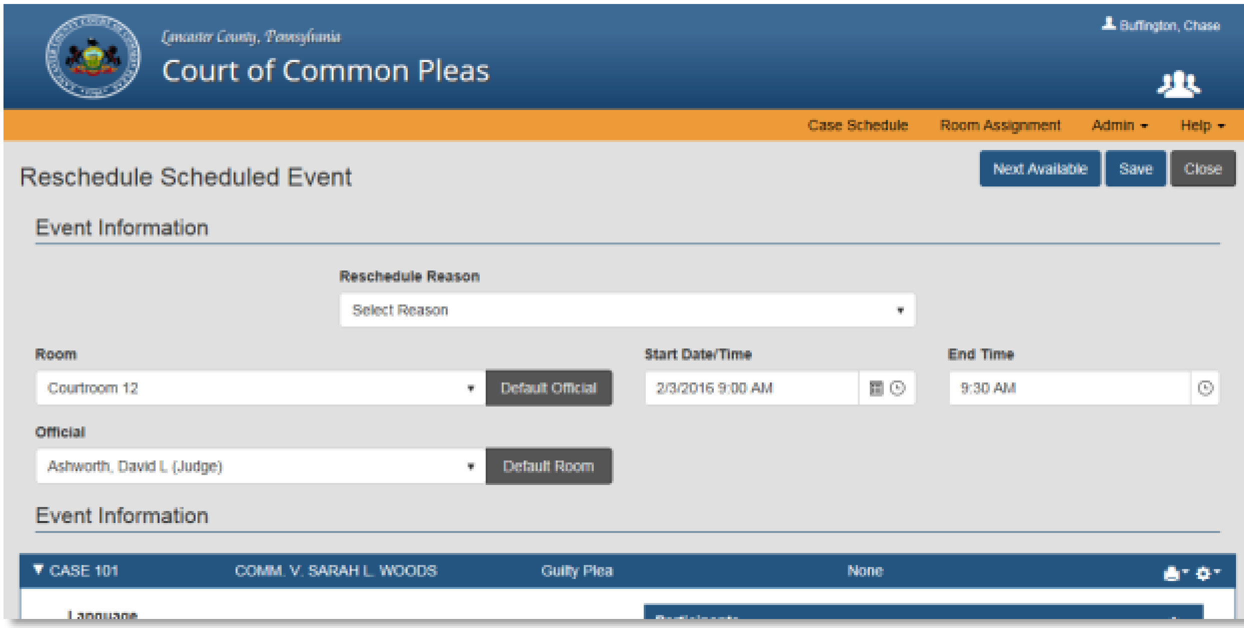
On the Case Schedules screen, select the icon on the desired Case:



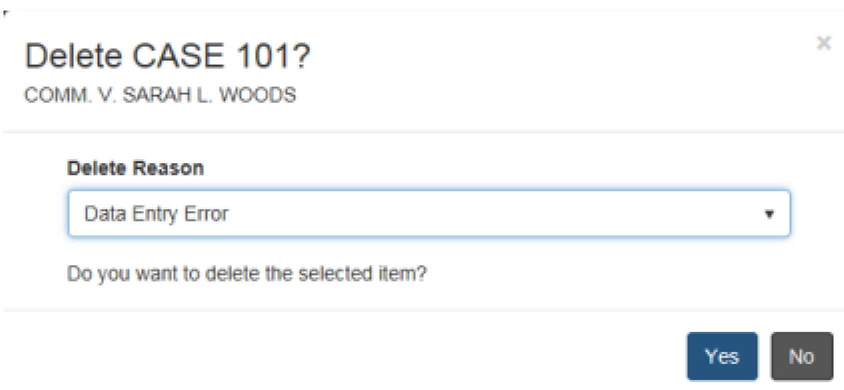
- **Edit** - This will display the Update Scheduled Event screen, which allows the user to change the Room, Official, Start Date, and Capacity, as well as add Events, upload files, and modify the Event Participants. Select Save to commit the changes.



- **Reschedule** – Change the date and time of the Event. Select a reason for the reschedule, a new Room Assignment, a new Official, and new Date and Times. Event Information can also be edited on this screen. Select Save to commit the changes.



- **Delete** – Delete the Event. Select a reason for the deletion from the drop down and select Yes.



- **Print Notice** – Prints the notice to send out to Case Participants.

COURT OF COMMON PLEAS OF LANCASTER COUNTY OF LANCASTER

OFFICE OF COURT ADMINISTRATION - SCHEDULING SECTION
LANCASTER COUNTY COURTHOUSE
50 NORTH DUKE STREET
PO BOX 83480
LANCASTER, PA 17608-3480
PHONE (717) 299-8041 FAX (717) 295-3599

February 03, 2016

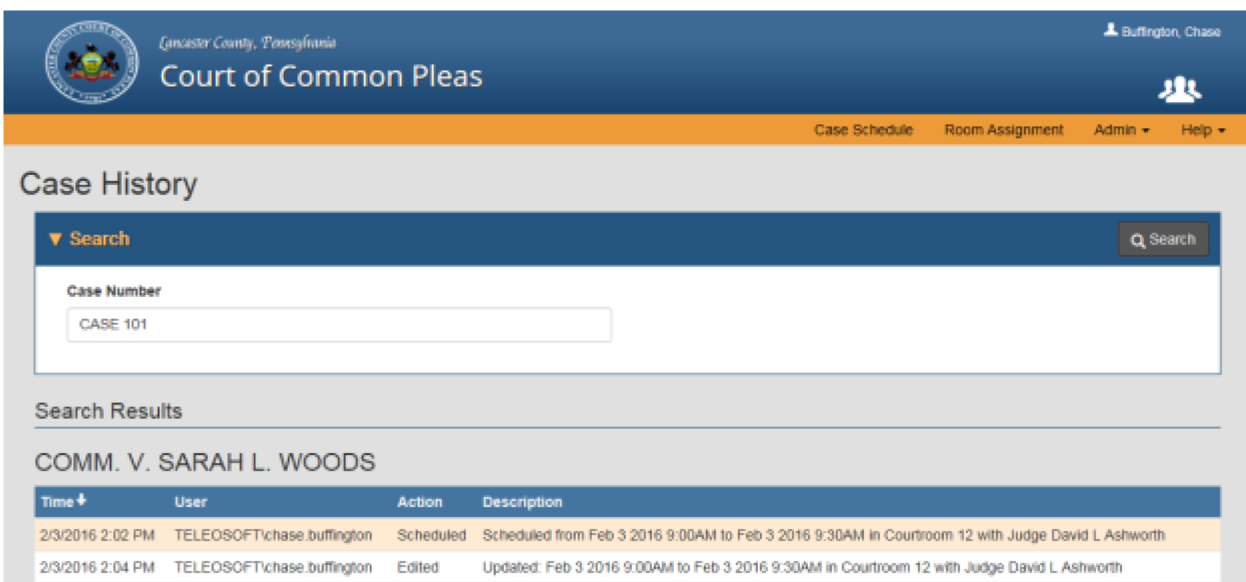
Thomas D Smith
123 Main Street
Lancaster, PA 83480

NOTICE OF COURT APPEARANCE

You are hereby notified that you are required to appear for a Guilty Plea regarding:

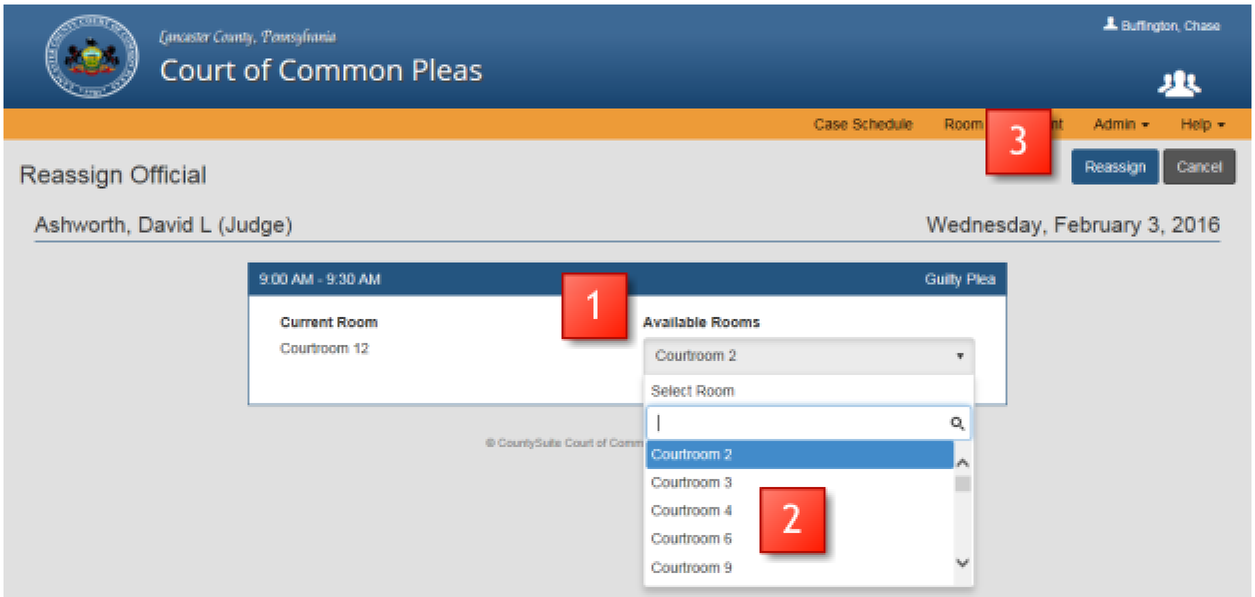
Case: CASE 101 Woods, Sarah L on February 03, 2016 at 9:00 AM in Courtroom 12 of the Courthouse.

- **Case History** – This will display the Case History screen.



How to Reassign an Official

On the Case Schedule screen, select the Court Official's name on the Scheduled Event. The Reassign Official screen will display, showing the current assignment.

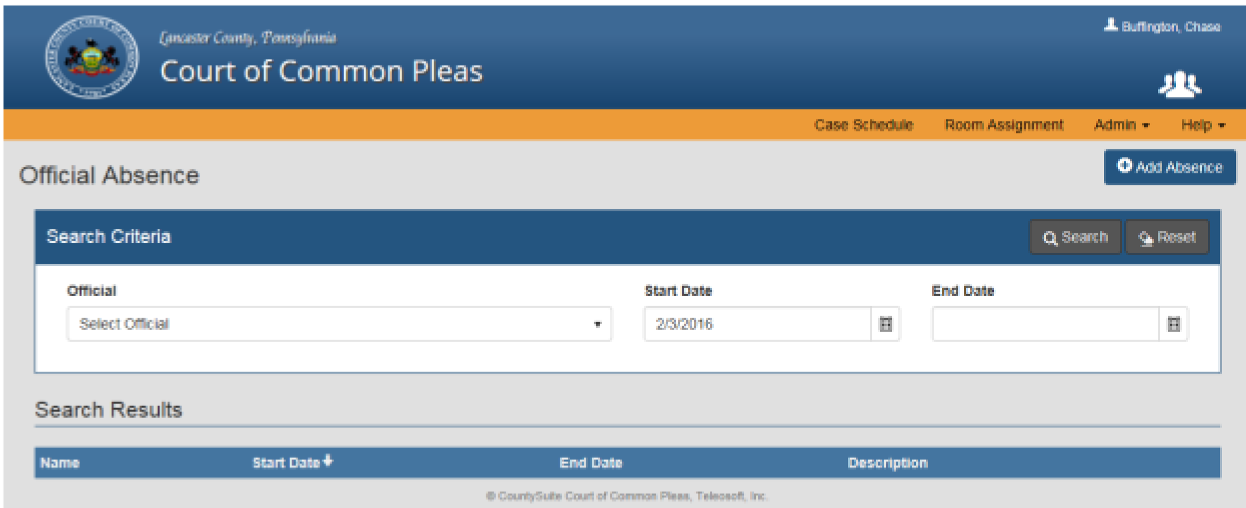


Step-by-step

1. Select the Available Rooms drop down.
2. Select the new room.
3. Select Reassign to commit the change.

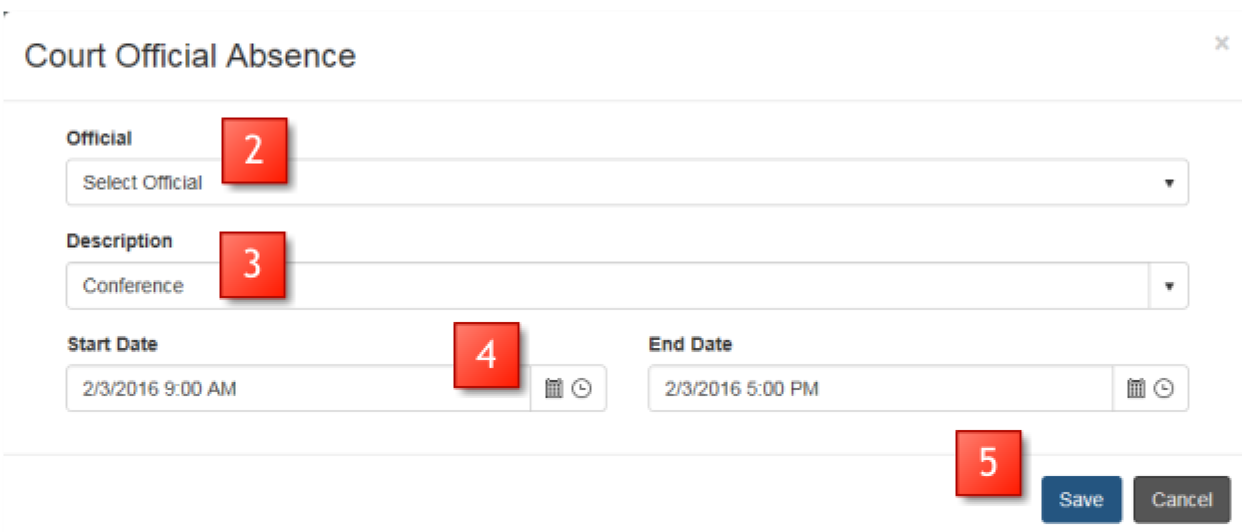
How to Add/Edit Official Absences

From the Case Schedules select the Admin drop down menu and select **Official Absence**. The Official Absence screen will be displayed.



Step-by-step

1. Select Add Absence.



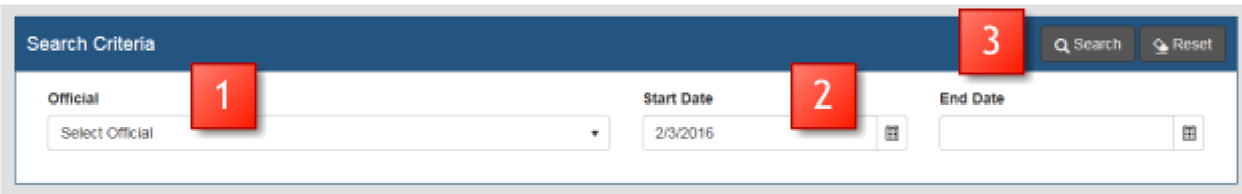
2. Select the Official.

3. Select a description for the absence.

4. Enter the Start and End dates for the absence.

5. Select Save.

To Edit or Delete an existing Absence, enter search criteria:



1. Select the Official.

2. Enter the Start and End dates for the absence.

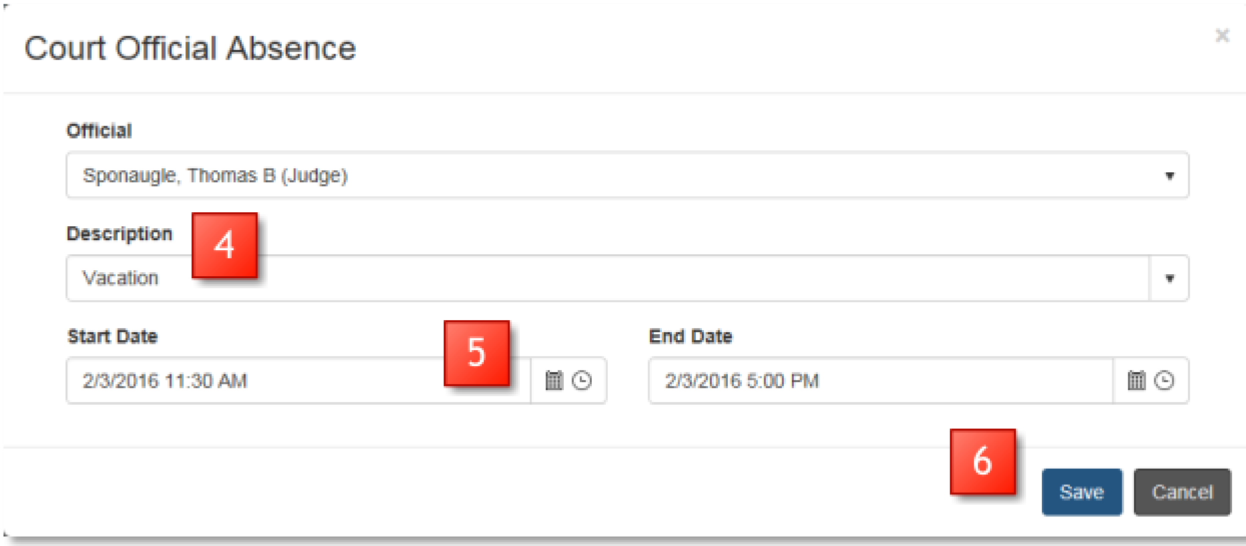
3. Select Search.

A list of results matching the search criteria will be displayed in the Search Results grid.

- Select ⚙▾.

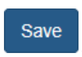
- Select Edit to modify the absence, or Delete to delete the absence.

- Selecting Edit displays the Court Official Absence dialog.



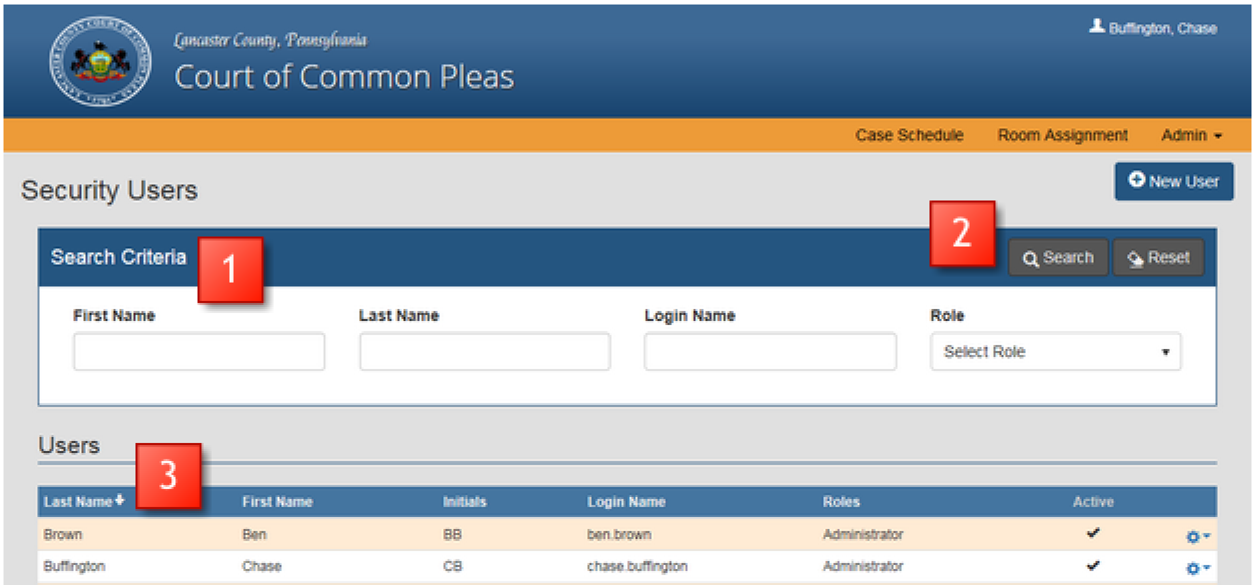
4. Select the description.

5. Change the Start Date and/or End Date.

6. Select .

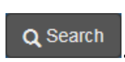
How to Search for a User

From the Case Schedule screen, select the Admin drop down menu, then select **Security Users**. The Security Users screen will be displayed.



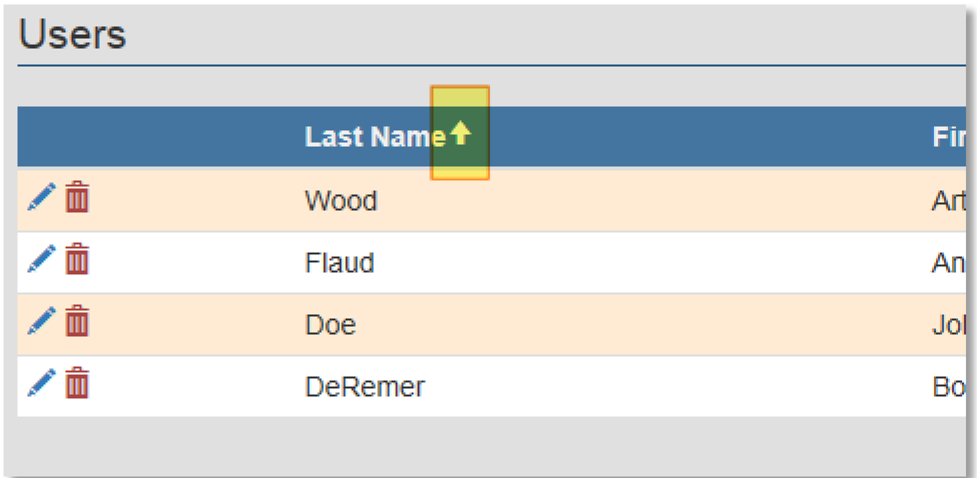
Step-by-Step

1. Enter all or part of the user's First Name, Last Name, Windows LoginName, and/or Role into the search boxes.

2. Press <Enter> or select 
.

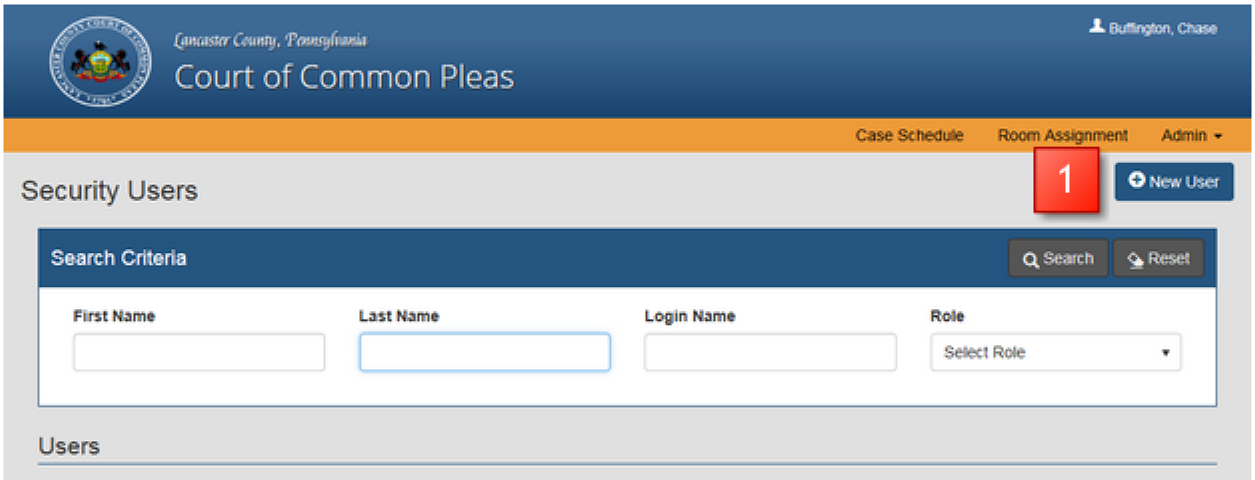
3. The search result grid will return the list of users that match the entered criteria.

4. To customize the order in which the results are displayed, select the column header. The results can be ordered by Last Name, First Name, Initials, Login Name, and Roles.



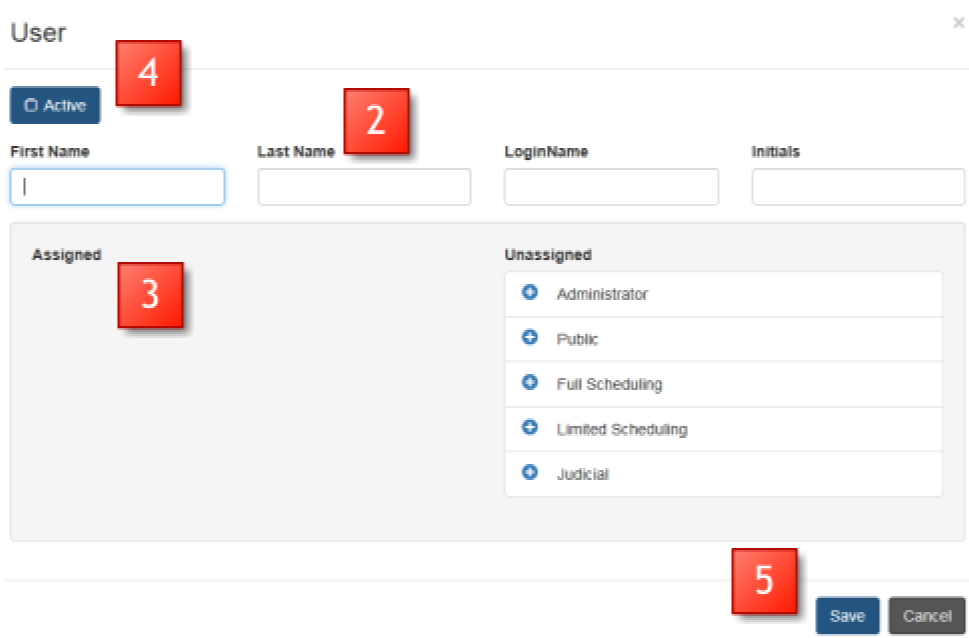
How to Add a New User

From the Case Schedule screen, select the Admin drop down menu, then select **Security Users**. The Security Users screen will be displayed.



Step-by-step

1. Select the New User button.



2. Enter the new user's First Name, Last Name, Windows LoginName, and Initials.

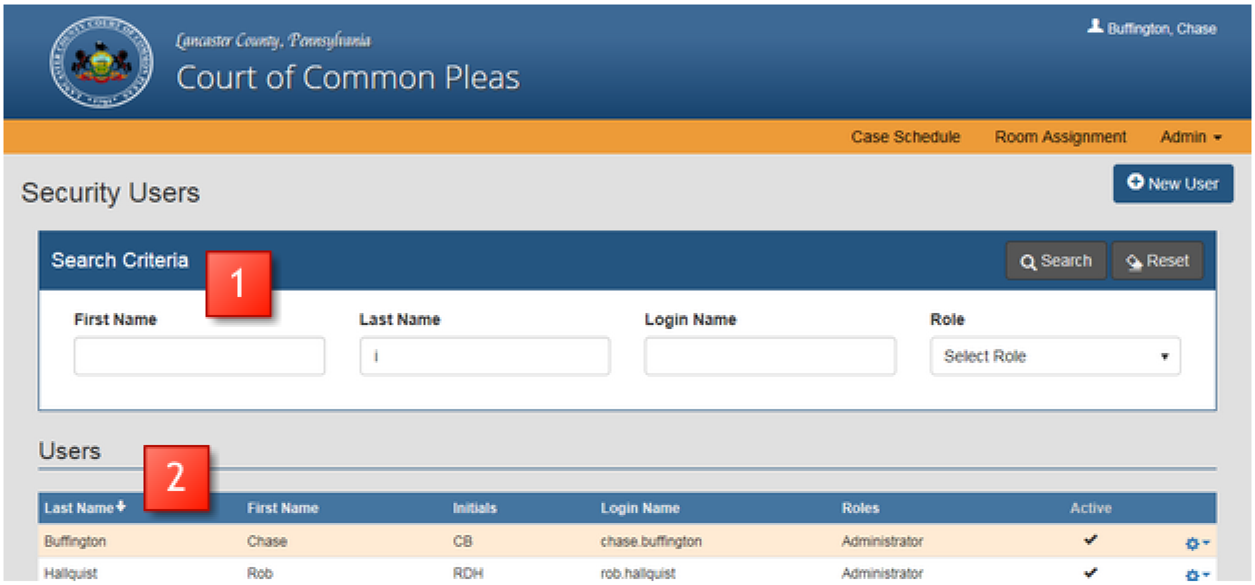
3. Choose the role(s) to assign to the user by selecting next to each role.

4. Check the Active box to set the user's status to active/inactive.

5. Select Save.

How to Edit a User

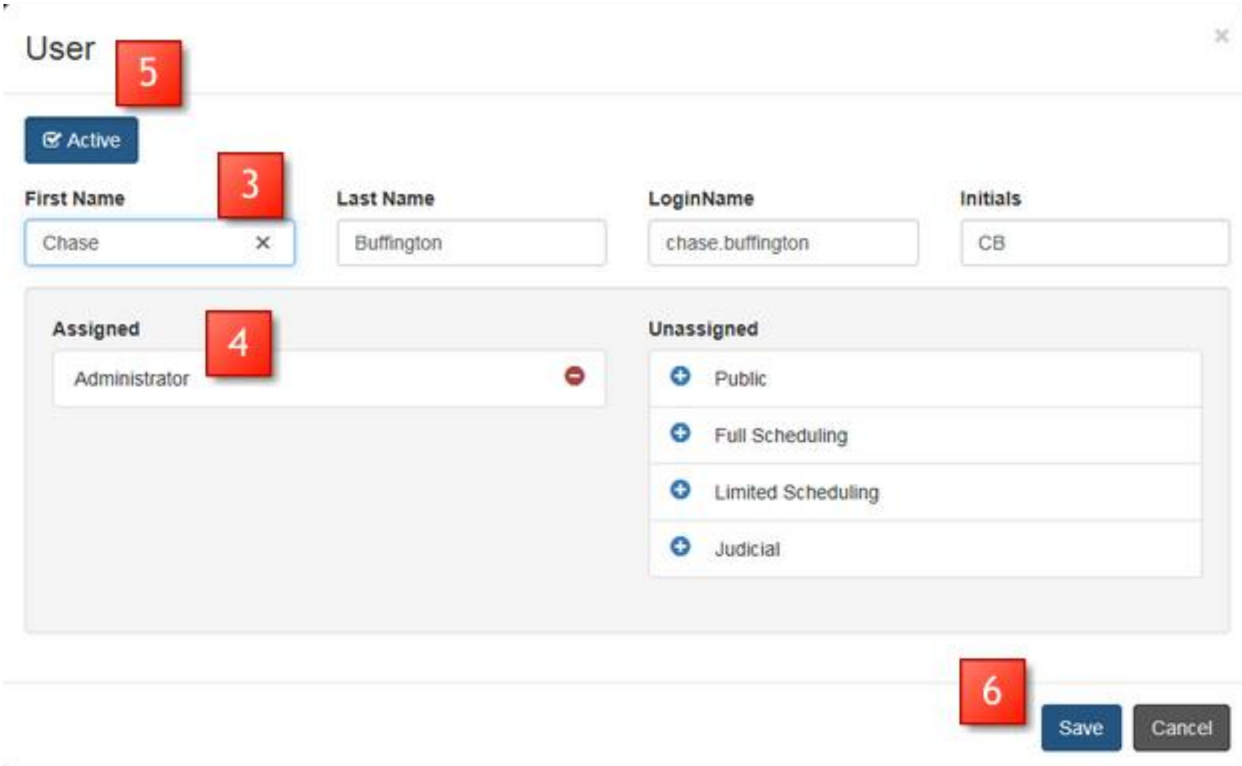
From the Case Schedule screen, select the Admin drop down menu, then select **Security Users**. The Security Users screen will be displayed.



Step-by-step

1. Enter the users First Name, Last Name, Login Name, and/or Role into the search boxes. Press <Enter> or select Search.

2. Select the ⚙ icon on a specific user's grid line in the search results, then select Edit.



3. Edit the new user’s First Name, Last Name, Windows LoginName, and/or Initials.

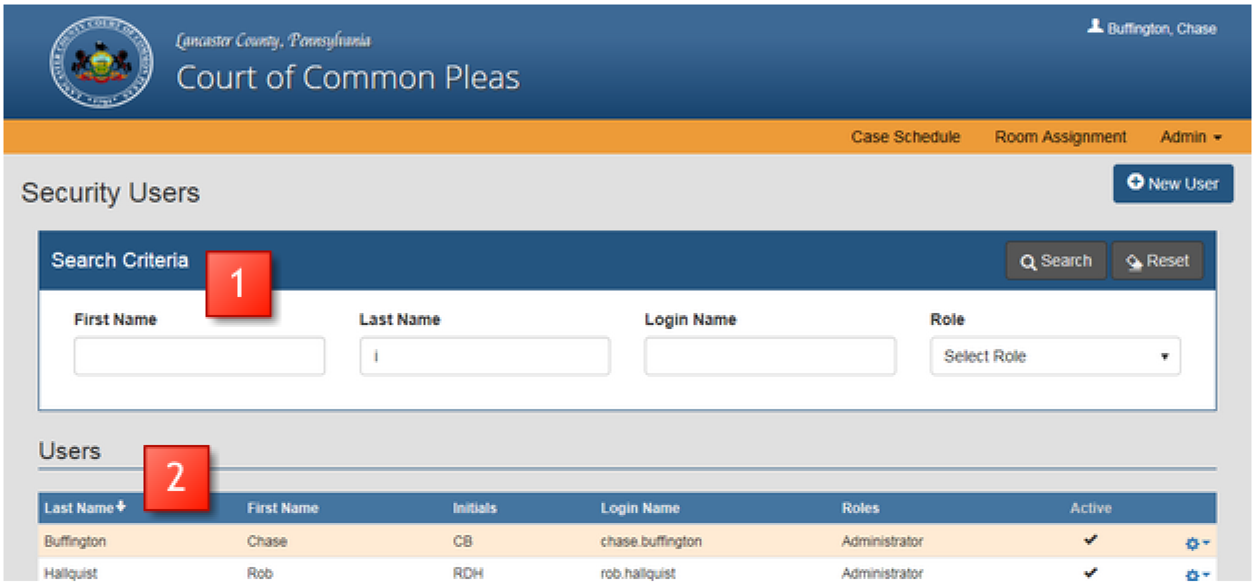
4. Edit the role(s) for the user by selecting to remove roles or to add roles.

5. Check the Active box to set the user’s status to active/inactive.

6. Select Save to commit the changes.

How to Delete a User

From the Case Schedule screen, select the Admin drop down menu, then select **Security Users**. The Security Users screen will be displayed.



Step-by-step

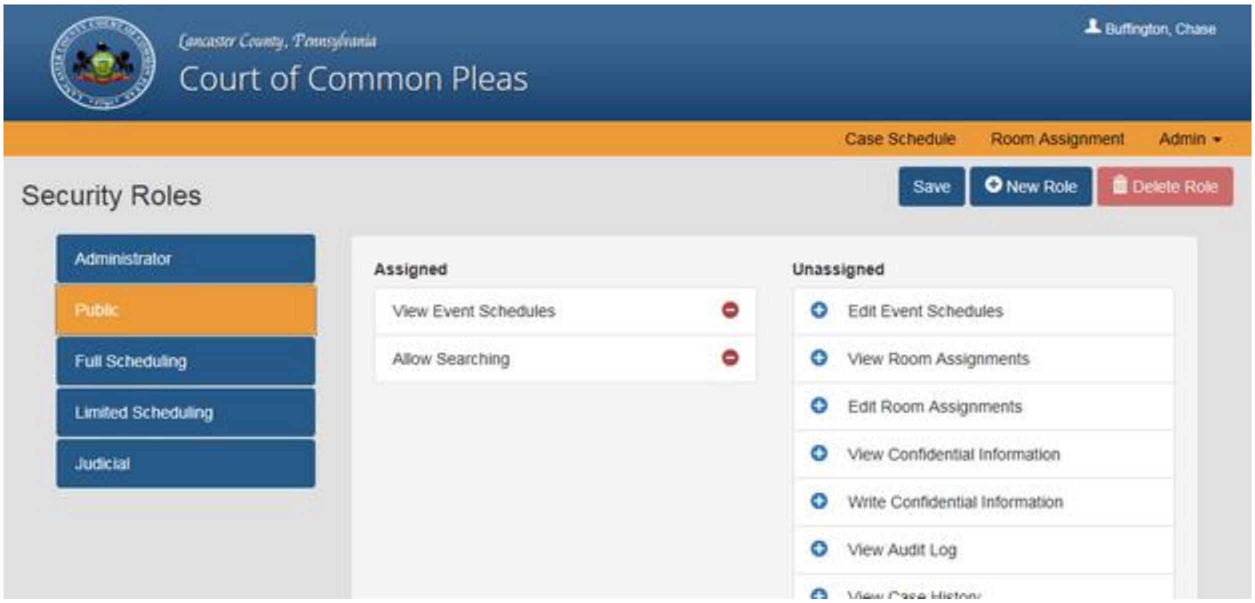
1. Enter the users First Name, Last Name, Login Name, and/or Role into the search boxes.

2. Select the  icon on a specific user's grid line in the search results, then select Delete.

3. Select Yes to confirm the user deletion.

How to View Security Role Permissions

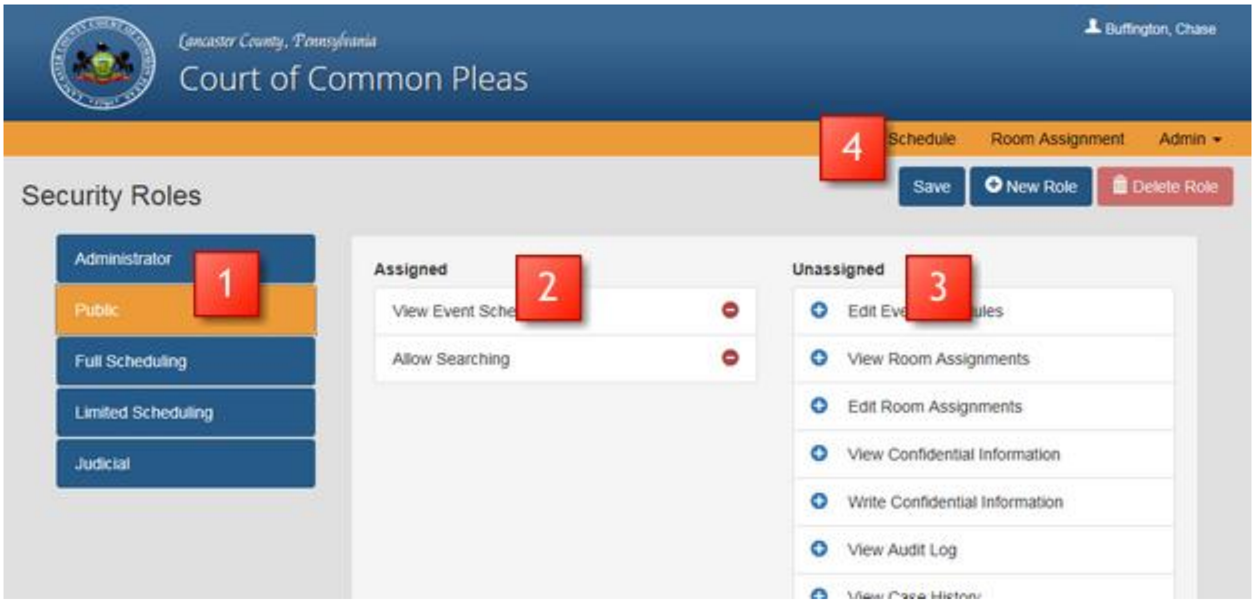
From the Case Schedule screen, select the Admin drop down menu, then select **Security Roles**. The Security Roles screen will be displayed.



- Select a role listed on the left side of the screen.
- Permissions that have been assigned to this role will appear under the "Assigned" column, and permissions that have not been assigned to this role will appear under the "Unassigned" column.

How to Edit Security Role Permissions

From the Case Schedule screen, select the Admin drop down menu, then select **Security Roles**. The Security Roles screen will be displayed.



Step-by-step

1. Select a role listed on the left side of the screen.

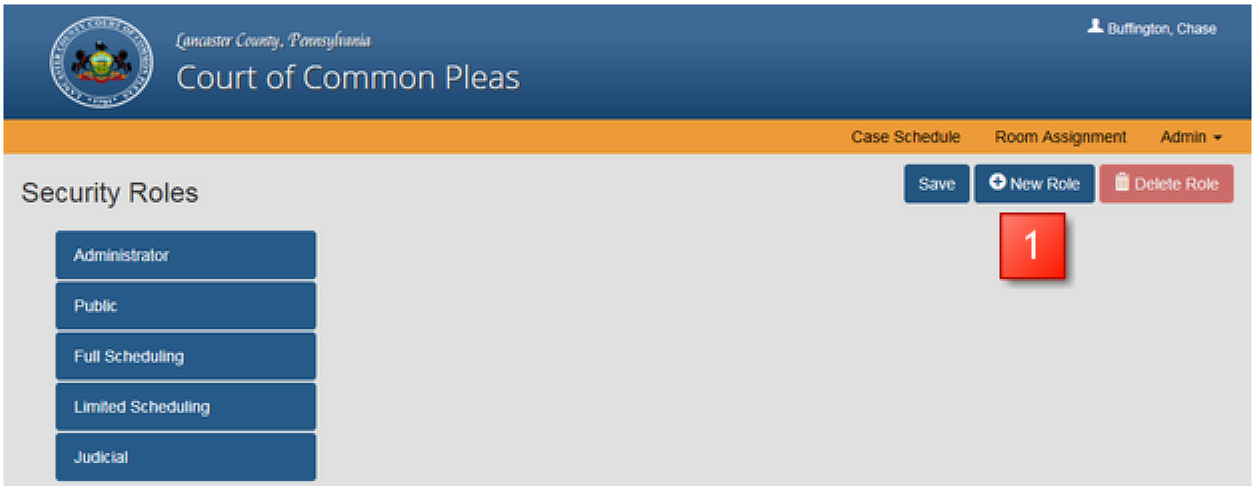
2. Select the on the “Assigned” permissions to remove them from the role.

3. Select the on the “Unassigned” permissions to add them to the role.

4. Select Save to commit the changes.

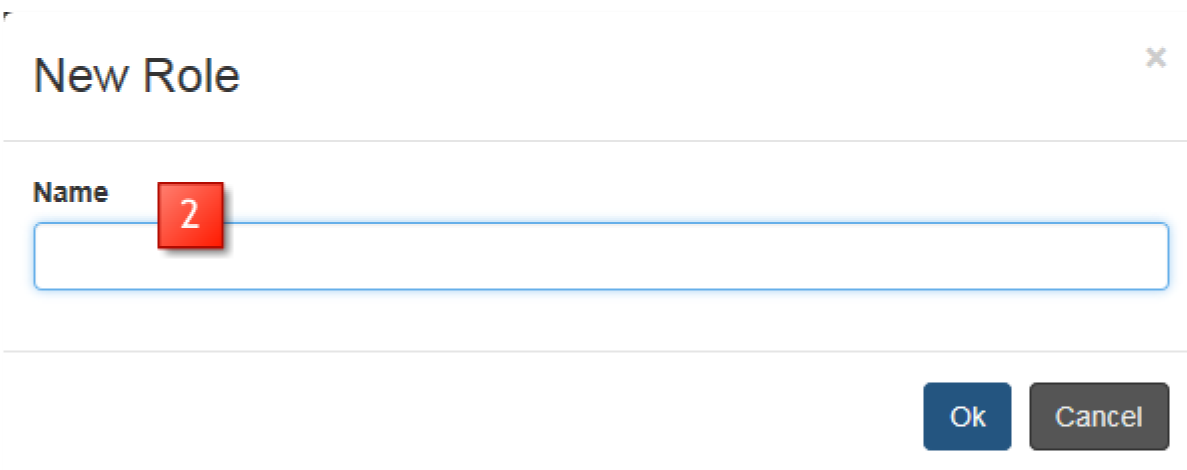
How to Add a Security Role

From the Case Schedule screen, select the Admin drop down menu, then select **Security Roles**. The Security Roles screen will be displayed.

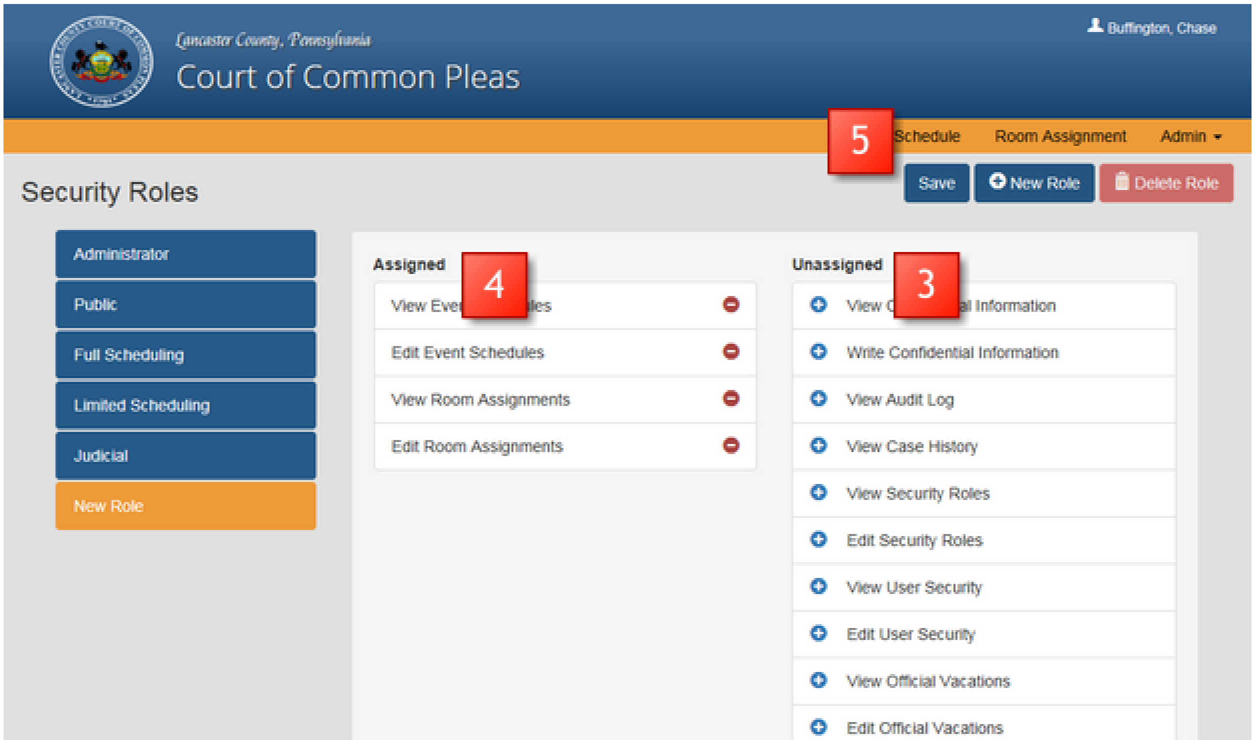


Step-by-step

1. Select the New Role button at the top of the screen.



2. Enter the title of the new security role into the “Name” text box and select Ok.



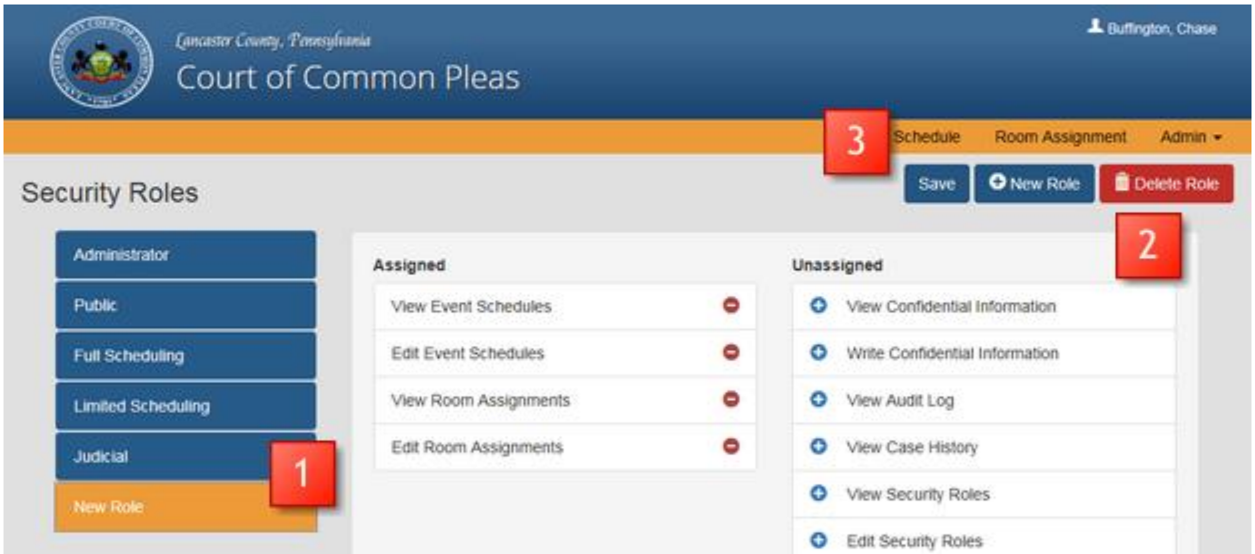
3. Select the on the “Unassigned” permissions to add them to the role.

4. Select the on the “Assigned” permissions to remove them from the role.

5. Select the Save button at the top of the screen.

How to Delete a Security Role

From the Case Schedule screen, select the Admin drop down menu, then select **Security Roles**. The Security Roles screen will be displayed.

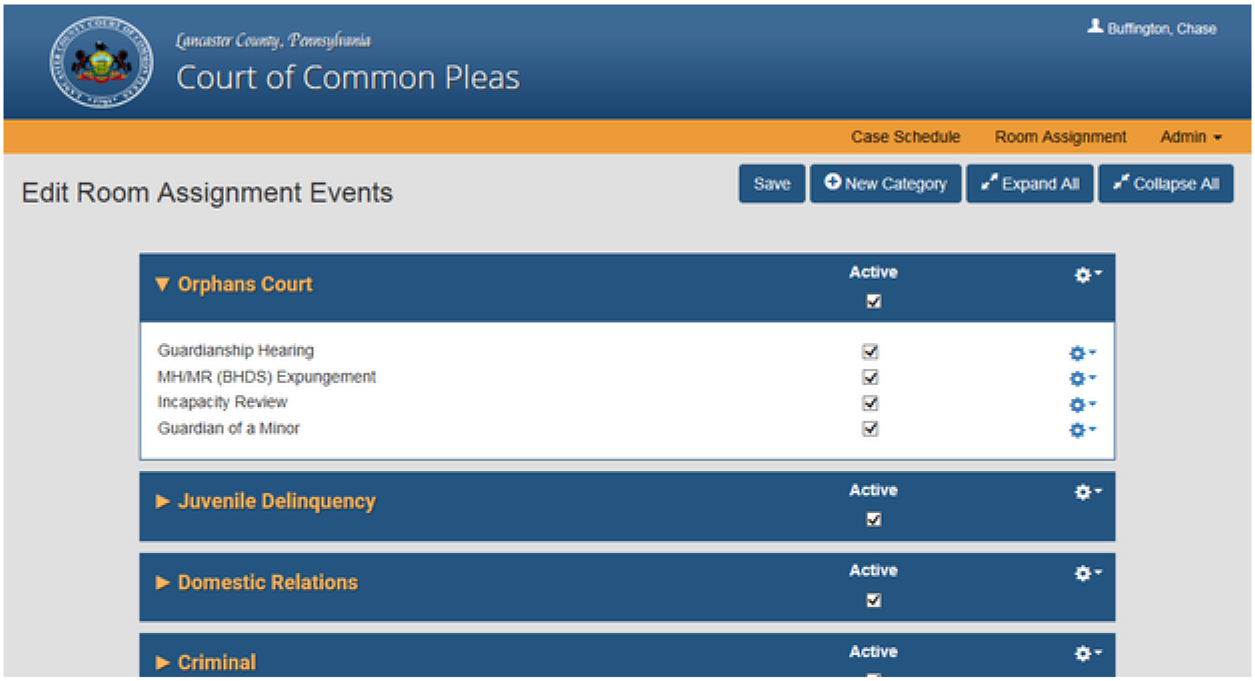


Step-by-step

1. Select the role to be deleted on the left side of the screen.
2. Select the Delete Role button at the top of the screen.
3. Select the Save button at the top of the screen.

How to View Room Assignment Categories and Events

From the Case Schedule screen, select the Admin drop down menu, then select **Room Assignment Events**. The Edit Room Assignment Events screen will be displayed.

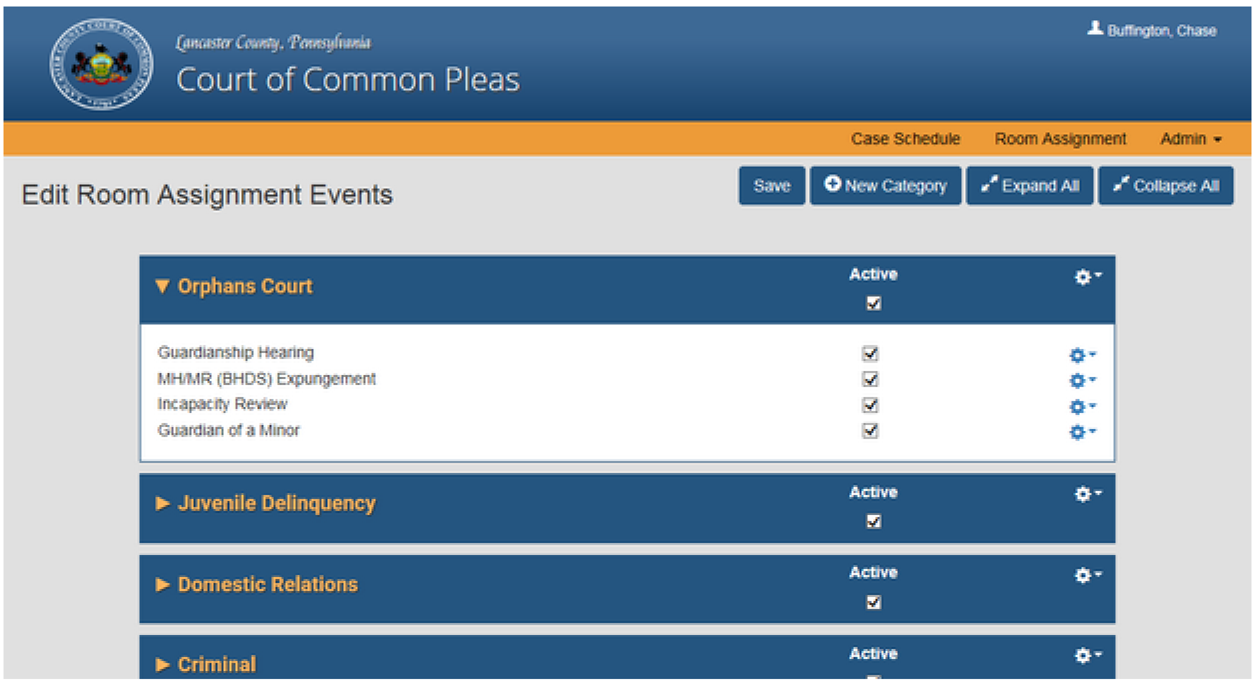


- The Room Assignment Categories will be listed.
- In order to view the Events under each Category, select the carat on each Category, or Expand All at the top of the screen to see all Events.
- Selecting Collapse All at the top of the screen will hide all Events.

How to Add/Delete Room Assignment Categories and Events

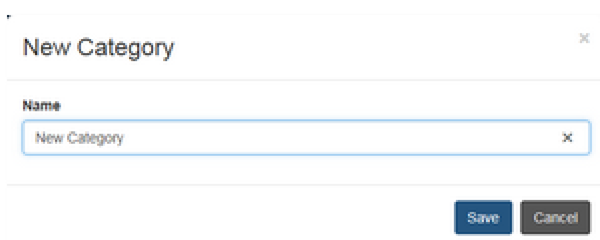
From the Case Schedule screen, select the Admin drop down menu, then select **Room Assignment Events**. The Edit Room Assignment Events screen will be displayed.

Note: To apply all changes made to Room Assignment Categories and Events, select Save at the top of the screen.



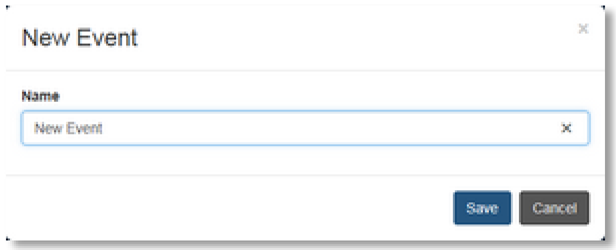
Step-by-step

1. To create a new **Category**, select the New Category button at the top of the screen.



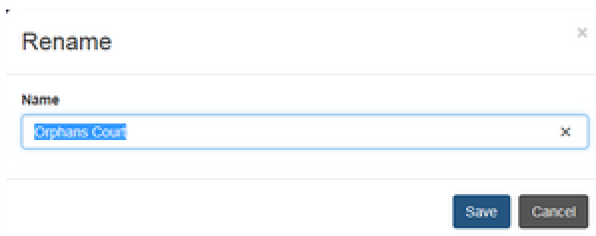
2. Enter the name of the Category and select Save.

3. To create a new **Event**, select the icon on a specific Category's grid line, then select New.



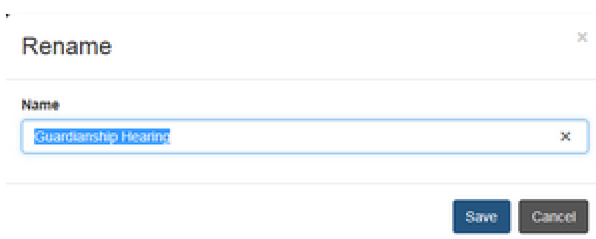
4. Enter the name of the Event and select Save.

5. To Edit a Room Assignment Category, select the icon on a specific Category's grid line, then select Edit.



6. Enter the new Category name, and select Save.

7. To Edit a Room Assignment Event, select the icon on a specific Event's grid line, then select Edit.



8. Enter the new Event name, and select Save.

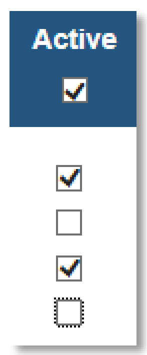
9. To Delete a Category, select the ⚙ icon on a specific Category's grid line, then select Delete.
   - If Delete is not displayed in the drop down menu, that Category is currently being used and may not be deleted until there are no longer any active Cases using it.

10. Select Yes to confirm the deletion.

11. To Delete an Event, select the ⚙ icon on a specific Event's grid line, then select Delete.
    - If Delete is not displayed in the drop down menu, that Event is currently being used and may not be deleted until there are no longer any active Cases using it.

12. Select Yes to confirm the deletion.

13. Select the checkbox under the "Active" column to set the **Category** or **Events** to Active/Inactive.

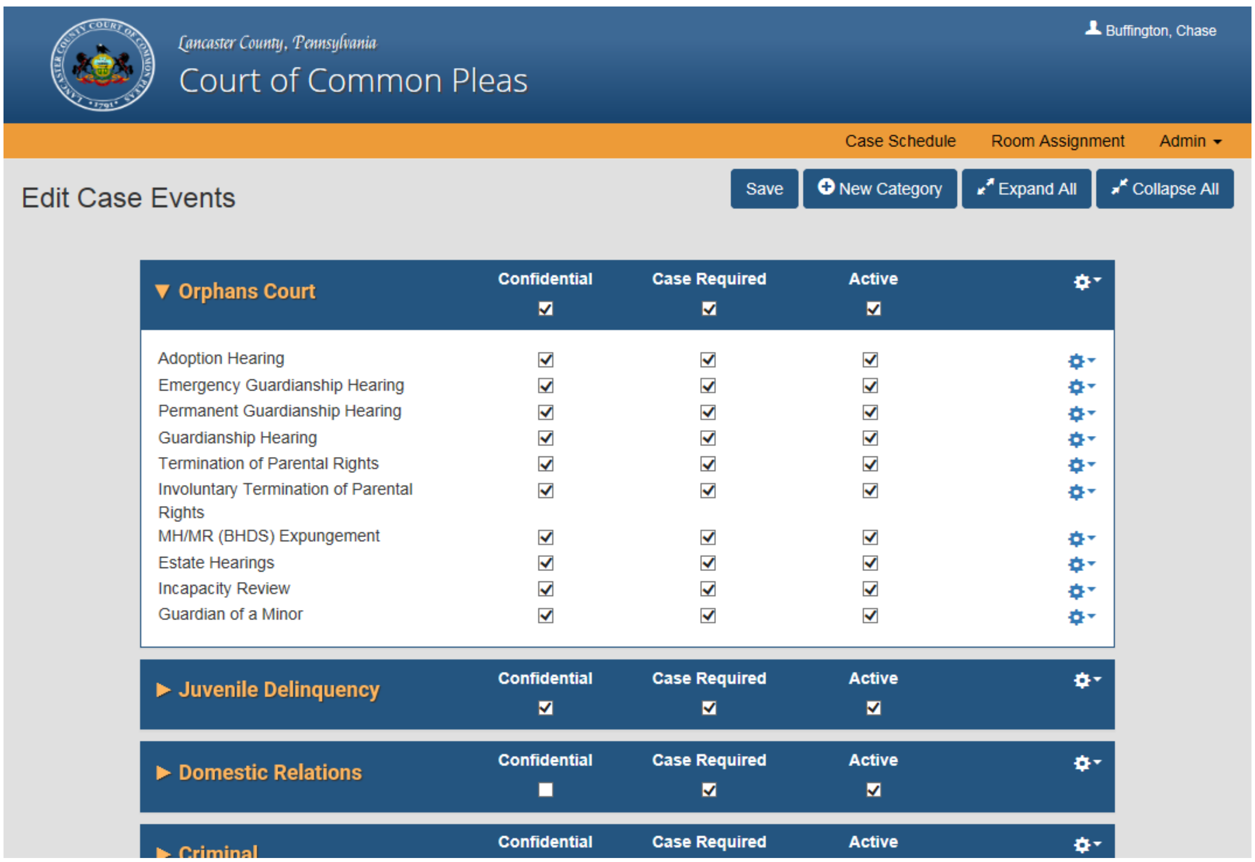


- "Inactive" Categories and Events remain available under on the Edit Room Assignment Events page, but do not appear as options on the Create Room Assignment page.

How to Add/Delete Case Schedule Categories and Events

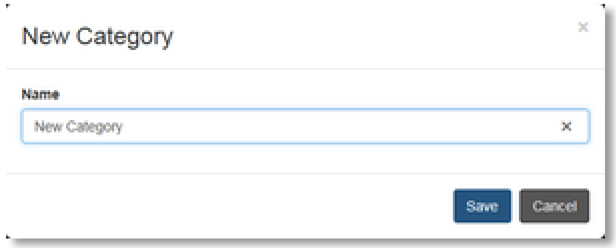
From the Case Schedule screen, select the Admin drop down menu, then select **Case Schedule Events**. The Edit Case Events screen will be displayed.

Note: To apply all changes made to Case Schedule Categories and Events, select Save at the top of the screen.



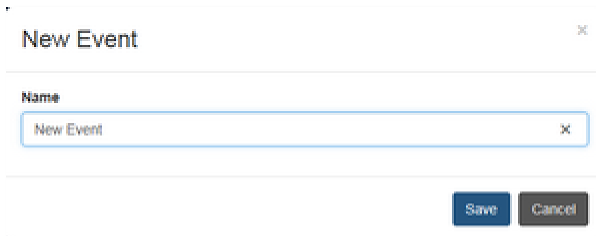
Step-by-step

1. To create a new **Category**, select the New Category button at the top of the screen.



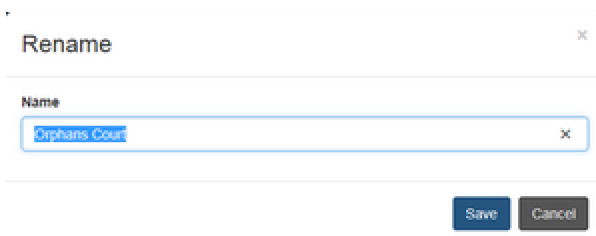
2. Enter the name of the Category and select Save.

3. To create a new **Event,** select the icon on a specific Category's grid line, then select New.



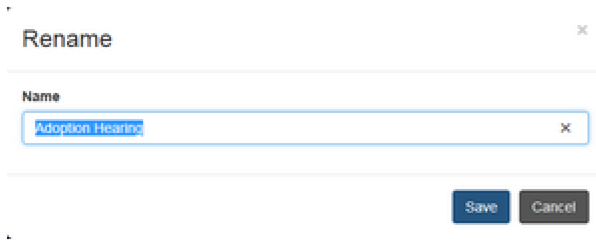
4. Enter the name of the Event and select Save.

5. To Edit a Case Schedule Event Category, select the icon on a specific Category's grid line, then select Edit.



6. Enter the name of the Category and select Save.

7. To Edit a Case Schedule Event, select the icon on a specific Event's grid line, then select Edit.



8. Enter the name of the Event and select Save.

9. To Delete a Category, select the icon on a specific Category's grid line, then select Delete.

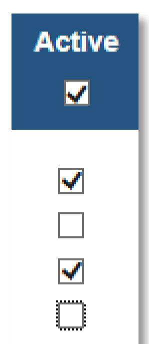
    - If Delete is not displayed in the drop down menu, that Category is currently being used and may not be deleted until there are no longer any active Cases using it.

10. To Delete an Event, select the icon on a specific Event's grid line, then select Delete

    - If Delete is not displayed in the drop down menu, that Event is currently being used and may not be deleted until there are no longer any active Cases using it.

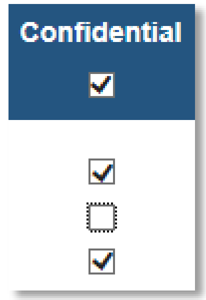
11. Select Yes to confirm the deletion.

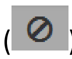
12. Select the checkbox under the "Active" column to set the **Category** or **Events** to Active/Inactive.



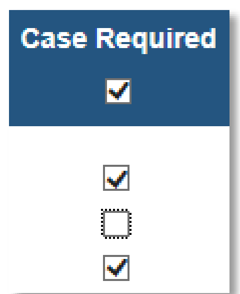
    - "Inactive" Categories and Events remain available under on the Edit Case Events page, but do not appear as options on the Create Scheduled Event page.

13. To set the Confidential status of the Event type, select the checkbox under the "Confidential" column.



- Confidential Event types automatically set the “Confidential” () Court Case attribute. Only users with appropriate permission will be able to view confidential Events.

14. If the Event requires that a Case number be assigned upon Event creation, select the checkbox under the “Case Required” column.

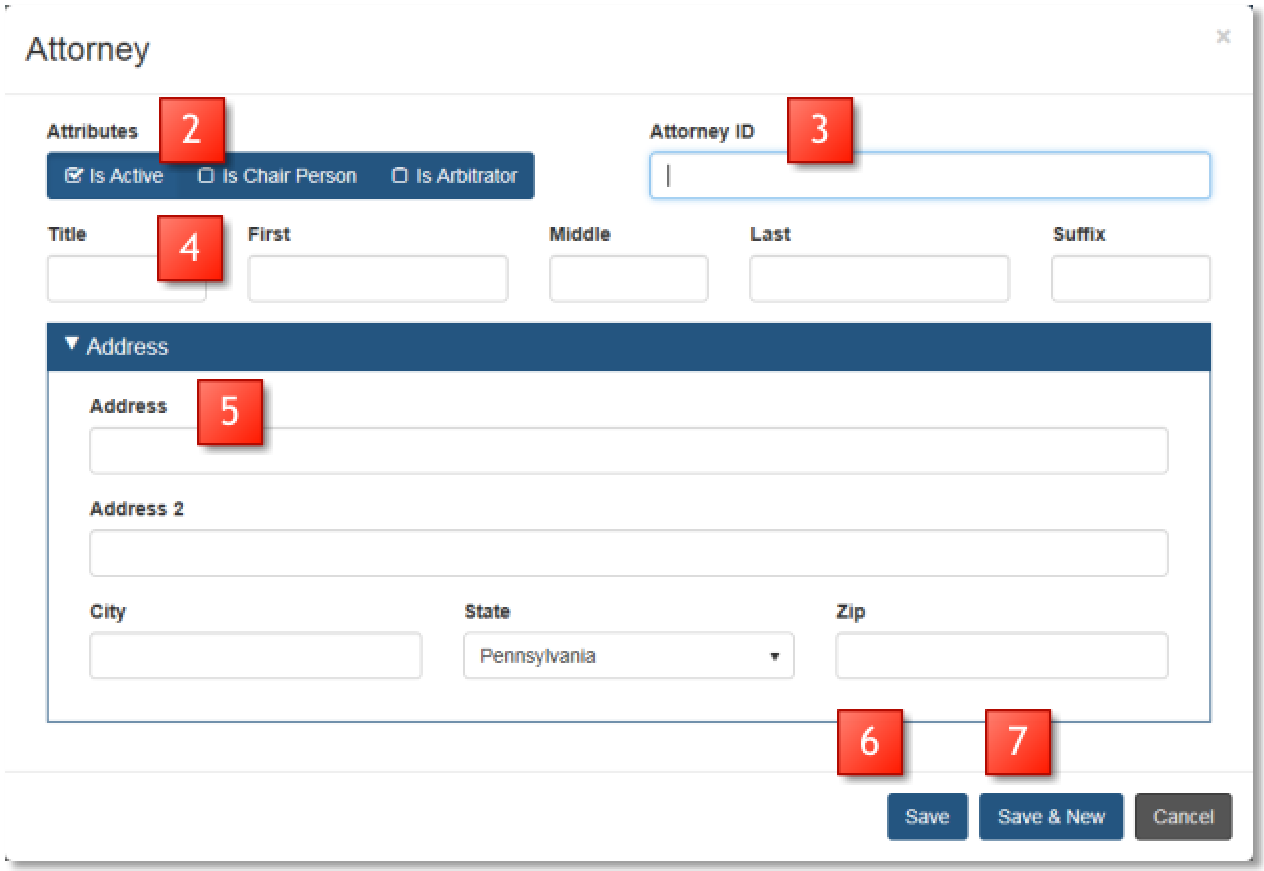


How to Add an Attorney

From the Case Schedule screen, select the Admin drop down menu, then select **Attorneys**. The Attorney Administration screen will be displayed.

Step-by-step

1. Select the New Attorney button.



2. Select the Attorney contact's attributes, including if the Attorney is an active user, a Chair Person, and/or an Arbitrator.

3. Enter the Attorney ID.

4. Enter the Attorney's name.

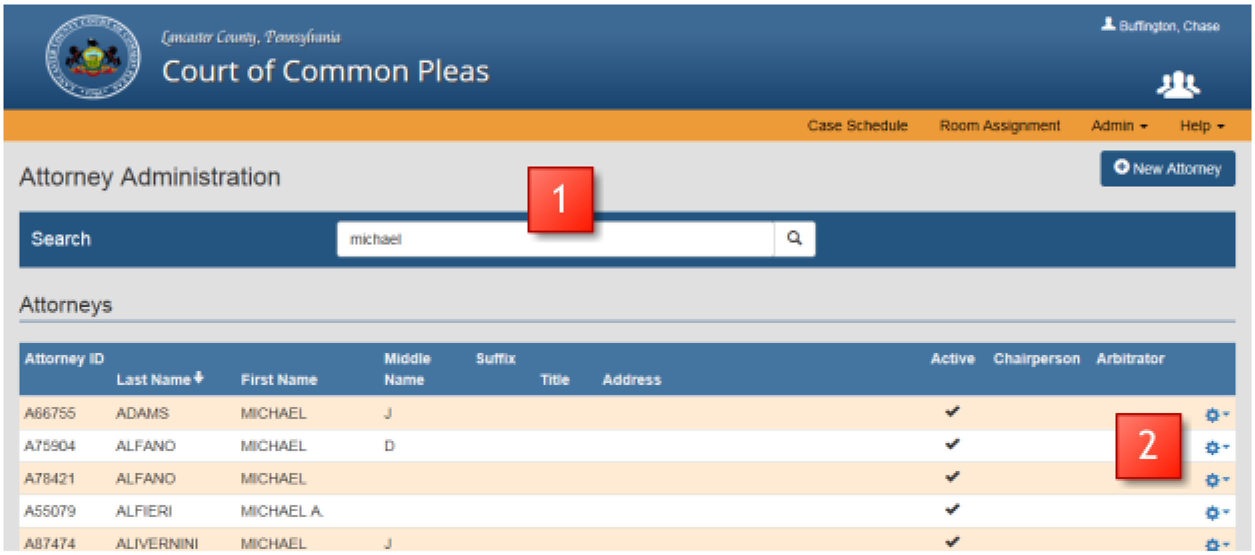
5. Enter the Attorney's address.

6. Select Save to save the Attorney Contact information and close the dialog box.

7. Select Save & Continue to save the Attorney Contact information and clear the dialog box to enter a new Contact.

How to Edit an Attorney

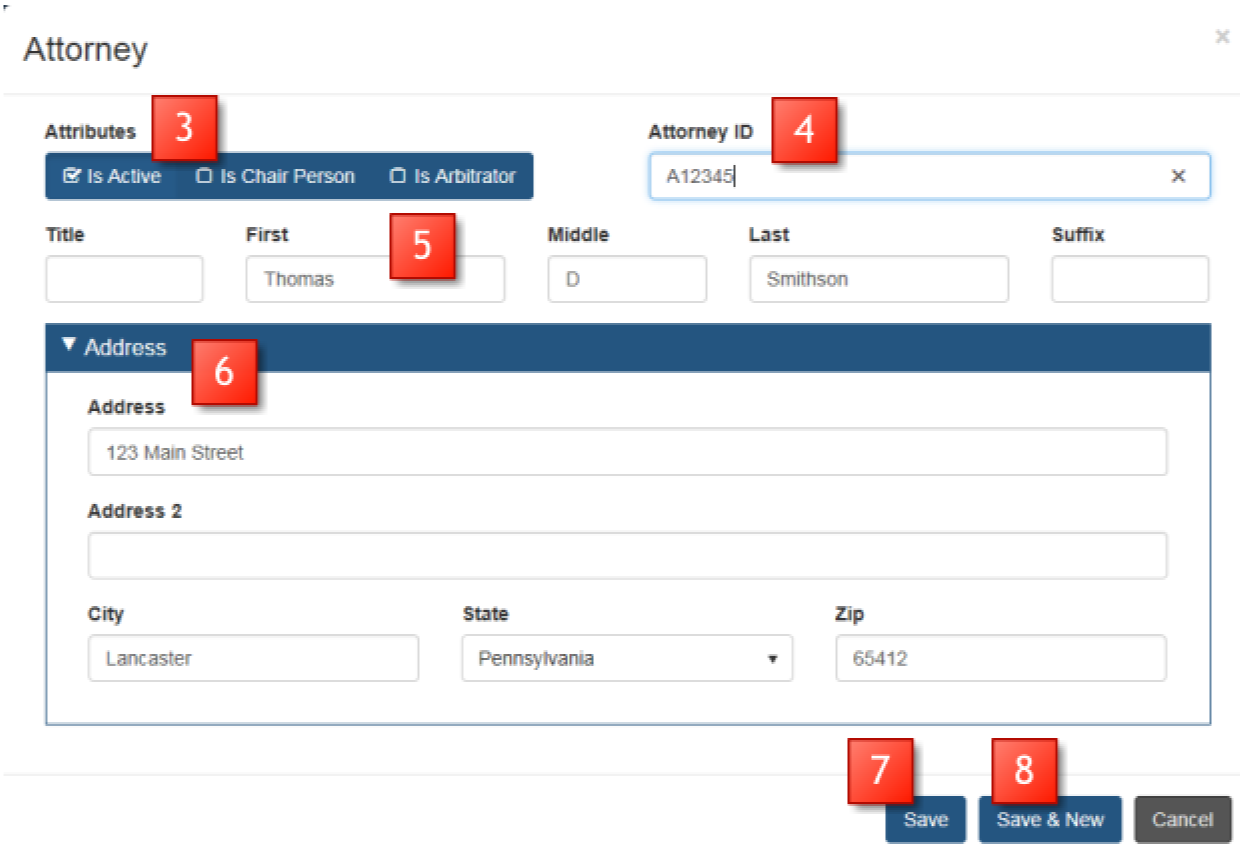
From the Case Schedule screen, select the Admin drop down menu, then select **Attorneys**. The Attorney Administration screen will be displayed.



Step-by-step

1. Enter either all or part of the Attorney's First Name and Last Name, or the Attorney ID. Press <Enter> or select .

2. Select the icon on a specific Attorney's grid line in the search results, then select Edit.



3. Edit the Attorney contact's attributes, including if the Attorney is an active user, a Chair Person, and/or an Arbitrator.

4. Edit the Attorney ID.

5. Edit the Attorney's name.

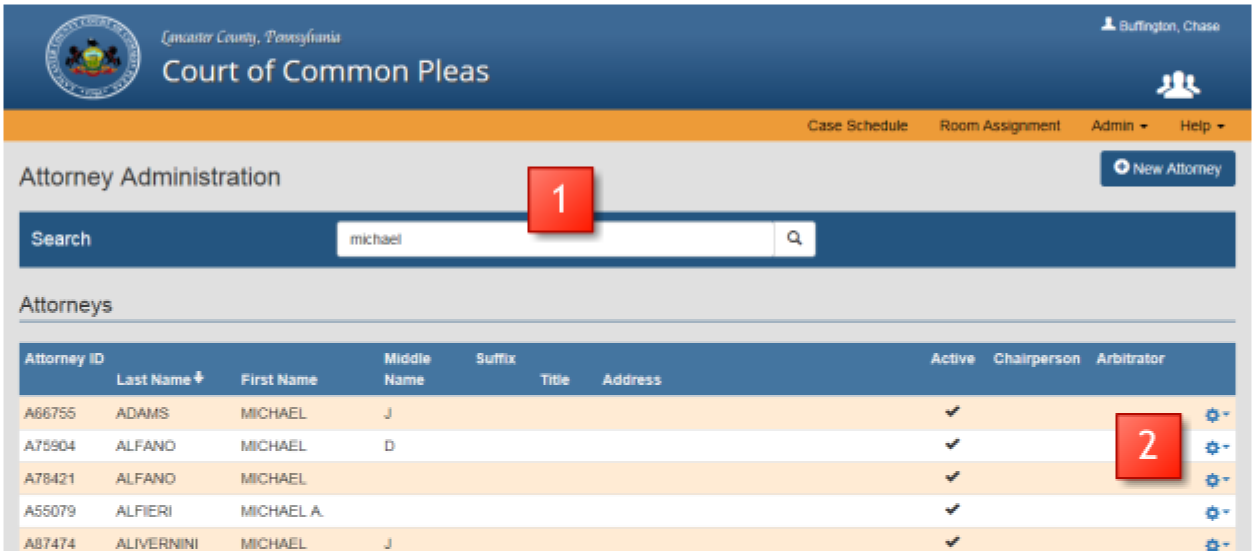
6. Edit the Attorney's address.

7. Select Save to save the Attorney Contact information and close the dialog box.

8. Select Save & Continue to save the Attorney Contact information and clear the dialog box to enter a new Contact.

How to Delete an Attorney

From the Case Schedule screen, select the Admin drop down menu, then select **Attorneys**. The Attorney Administration screen will be displayed.



Step-by-step

1. Enter either all or part of the Attorney's First Name and Last Name, or the Attorney ID. Press <Enter> or select .

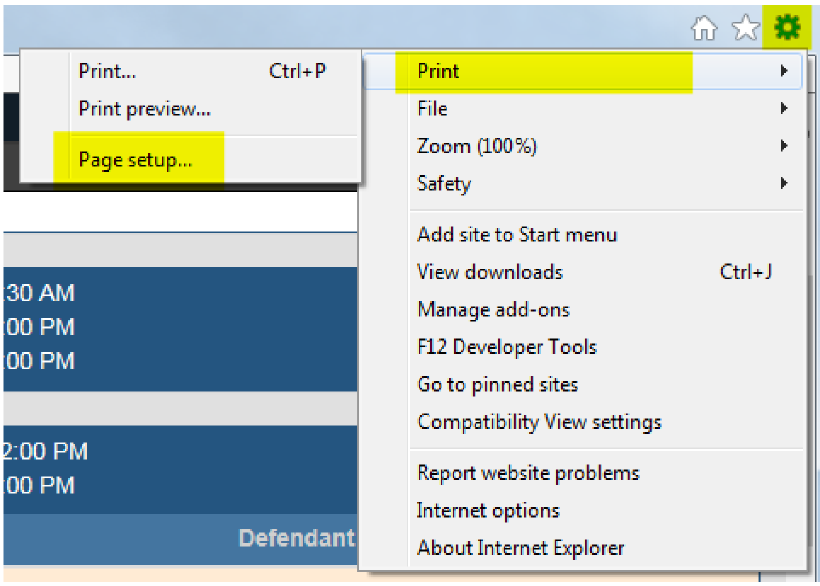
2. Select the icon on a specific Attorney's grid line in the search results, then select Delete.

3. Select Yes to confirm the Attorney deletion.

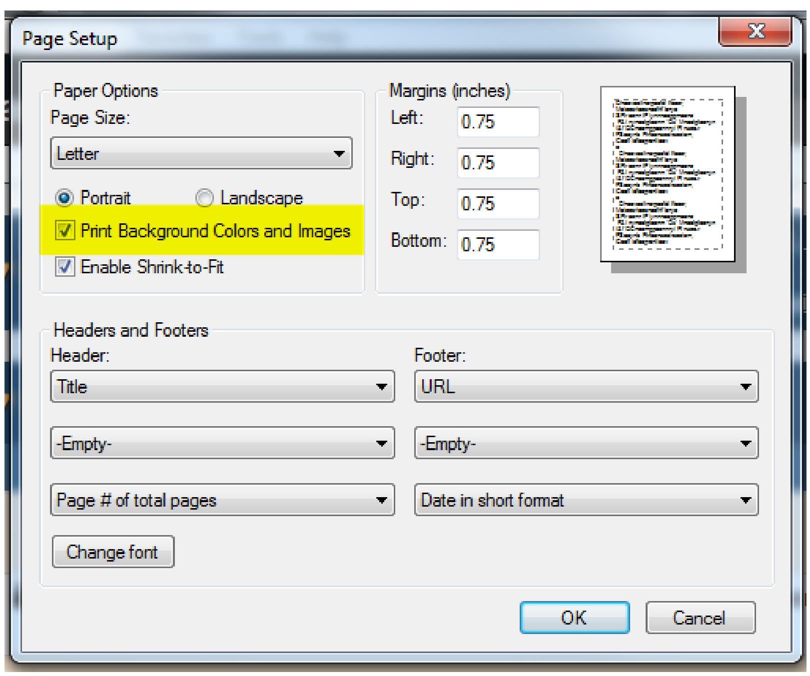
How to Print Background Colors from Schedules

When printing out schedules, the background color appears in the Print Preview screen, but will not show on the printout unless the browser's print settings are modified.

1. **Internet Explorer 11**
    a. Select "Print > Page Setup..." from the Settings menu (cog):



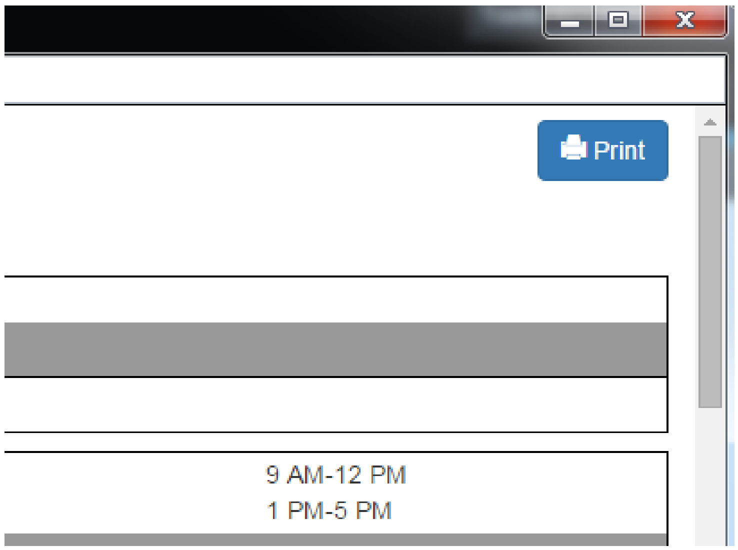
    b. Check the "Print Background Colors and Images" checkbox:



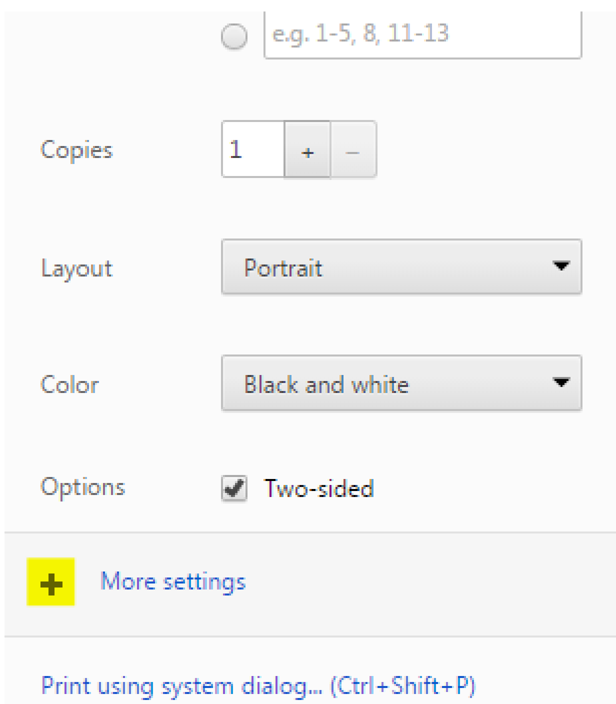
2. Chrome

a. Click the "Print" button on the Schedule page (displays print preview)

b. Click the "Print" button on the Print Preview:



c. In the Chrome print dialog, click the + button next to the More Settings:



d. Check the “Background Graphics” checkbox: