

OFFICE OF THE DEFENDER GENERAL CASE MANAGEMENT SYSTEM

JustWare Defender How to Create a Name Record

This guide walks you through creating a Name Record in JustWare Defender

All users should be familiar with the JustWare 101 guide first.

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10-7-2015

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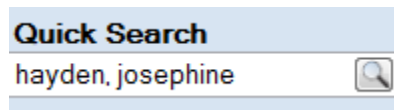
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How to Create a JustWare Name Record

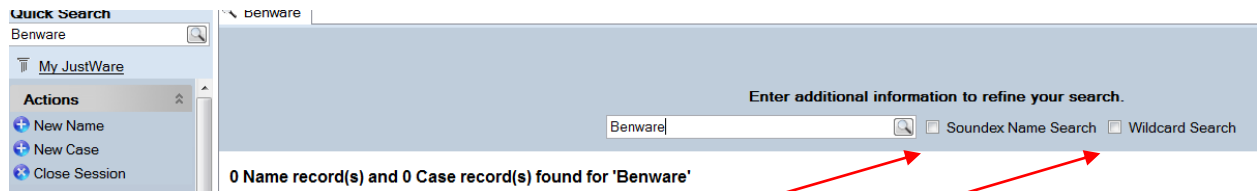
It is important to search for a name record before adding a new name, in order to avoid multiple name records for the same individual.

SEARCH FOR THE NAME OF THE PERSON for whom you are creating a new name record:

- Quick Search
- Fill in name (Last Name, First Name, or just Last Name, or just First Name)
- Press Enter or Click Search Button (Magnifying Glass)



If the name is not found, you will receive the following screen:



Note: You can click on Soundex or Wildcard to broaden your search. You can use the wildcard (*) if you are not sure of the spelling, i.e., search for Anderson or Andersen as Anders*. The wildcard only functions at the end of a word, not the beginning or middle. **Wildcard needs at least three letters filled in at the beginning of a name**

SEARCH FOR A JUVENILE NAME

If you know the person you are searching for is a juvenile:

- **Use Name Search (Under Search section)** (NOTE: you will see fields on this screen that we are not using)
- **Fill in juvenile's initials in Last Name**
- **Fill in Date of Birth (DOB)**
- **Press Enter to start the search, or click on Actions, Search**

The screenshot shows a software interface for searching for a juvenile name. On the left is a sidebar with 'Quick Search' and 'My JustWare' sections. Under 'Actions', there are options: 'New Name', 'New Case', 'View/Edit Name', 'Search', and 'Close Session'. Under 'Search', there are options: 'Case Quick Search', 'Name Search', and 'Name Quick Search'. The 'Name Search' option is selected. The main area displays a form with the following fields: Last Name (JH), First Name, Middle Name, Prefix, Suffix, Name Type, DOB (03/12/2001), DL State, DL Class, Drivers License Number, Race, Gender, Hair Color, Eye Color, Social Security Number, Badge Number, Birth Country, and DOC PID Number. Below the form is a 'Search Results' section with a search bar containing '<Search>' and a table with columns for Last Name, First Name, Middle Name, Name Type, and Race. A red arrow points from the 'Name Search' option in the sidebar to the search bar in the 'Search Results' section.

If any records are found matching the initials and DOB, they will be listed under **Search Results**.

If the name is not found, then you need

ENTER A NEW NAME (see below for entering a Juvenile Name):

- **Under Actions Click New Name**
The name screen loads
- **Fill in Name information that is known**
(Enter **DOB** by entering numbers only; age auto fills when record is saved; in **Race** and **Gender** you can enter the first letter of the dropdown information, such as "W", and press Tab. Note the birth country, if possible, if not the U.S.)
- **Save the record**
Click on File, Save Name, or Actions, Save Name
Press Ctrl-S

ENTER A NEW JUVENILE NAME


- **Under Actions Click New Name**
The name screen loads
- **Enter the juvenile's initials in the Last Name field**
- **Enter Date of Birth**
(Enter **DOB** by entering numbers only; age auto fills when record is saved)
- **Enter any other information that you want to include.**
In **Race** and **Gender** you can enter the first letter of the dropdown information, such as "W", and press Tab. Note the birth country, if possible, if not the U.S.)
- **Save the record**
Click on File, Save Name, or Actions, Save Name
Press Ctrl-S


When the record is saved, you will see the yellow ribbon at the top of the record indicating this is a Juvenile.

Remember that Names can be seen state-wide. Be careful that you do not include any information that could identify the juvenile. You can enter information on the Juvenile's family and other relationships in the Case Record, which is only seen by members of your Agency, and other JustWare users who you have involved in the case.

ENTER ADDITIONAL INFORMATION

Enter additional information on the appropriate tabs.

In each of these tabs you need to add a line by clicking on the Green Plus sign ().

The Red Minus sign () deletes a line (you will not be able to delete all lines, example, address entered by someone else).

- Any information in a dropdown in this section can be auto filled by entering the first letter of the word and pressing Tab.
- You need to fill in the Inactive Date, when that information becomes inactive.
- You do not need to fill in the Created By and Created On fields (that will auto populate when the record is saved).
- The **Note** field in any of the tabs is a text field, so you may enter any additional information.

Note: Do not enter the docket number of a case in the name record.

Contact Information

- **Address** (enter the street, enter zip code first and primary city for the zip code will auto fill. For zip codes that have more than one town attached to it (Montpelier, Berlin), you need to check the City, and the City field will contain a dropdown menu for the towns associated with that zip code. If you enter the city first and a different zip code, the city will not be changed to match the zip code).
- **Phone**
- **Email (email addresses are not synched with Outlook)**

Name record on the **Contact Information** tab:

Benware, Ralph A DOB: 09/09/1988

Last Name*	First Name	Middle Name	Prefix	Suffix
Benware	Ralph	A		
DOB	Age	Race	Gender	Birth Country
09/09/1988	27	White	Male	
DOC PID Number	Badge Number	Created By	Created On	
		Evans, Lora - X004682	7/16/2015 10:00:22 AM	

[VICourtsOnline](#)
 [DG Website](#)
 [Offender Locator](#)
 [Westlaw Signin](#)

Case Involvements (Read-Only) | **Contact Information** | Flags | Numbers | Relationships | Name Summary

Address

Address Type*	Agency & C/O	Address	City	State	ZIP Code	Inactive Date	Created By	Created On	Last Modified By	Last Modified On
Home	Parents' home	121 Broad Lane	MIDDLEBURY	Vermont	05753		Evans, Lora - X004682	7/16/2015 5:30:19	Evans, Lora - X004682	7/17/2015 9:04:02

Phone

Phone Type*	Phone Number*	Inactive Date	Notes	Created By	Created On	Last Modified By	Last Modified On
Home	(802) 388-2222		Parents' phone	Evans, Lora - X004682	7/17/2015 9:01:00	Evans, Lora - X004682	7/17/2015 9:01:00
Cell	(802) 333-2222		Girlfriend's phone	Evans, Lora - X004682	7/17/2015 9:01:00	Evans, Lora - X004682	7/17/2015 9:01:00

Email

Email Type*	Email Address*	Inactive Date	Notes	Created By	Created On	Last Modified By	Last Modified On
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Flags

Any information entered in **Flags** will display in a **Notifications** window when the name record is opened and as a red notice underneath a name record shown in a search. The following information can be identified:

- Check Literacy
- Check Mental Health
- Deceased
- Disability
- Needs Interpreter
- Nickname
- Veteran

Enter any additional information in the **Notes** field:

- Check Mental Health – indicate where the information comes from; i.e., a finding by a previous judge.
- Check Literacy – indicate what the issue is
- Needs Interpreter – indicate the language spoken by the person
- Nickname – enter the nickname

Name record on the **Flags** tab:

Benware, Ralph A. DOB: 09/09/1988									
Last Name*		First Name			Middle Name		Prefix		Suffix
Benware		Ralph			A				
DOB	Age	Race	Gender	Birth Country	DOC PID Number	Badge Number	Created By	Created On	
09/09/1988	27	White	Male				Evans, Lora - X004682	7/16/2015 10:00:22 AM	
VtCourtsOnline DG Website Offender Locator Westlaw SignIn									
Case Involvements (Read-Only) Contact Information Flags Numbers Relationships Name Summary									
Type* Note Created By Created On Last Modified By Last Modified On									
Needs Interpreter	Speaks Bosnian			Evans, Lora - X004682	7/17/2015 8:59:08	Evans, Lora - X004682	7/17/2015 10:18:21		

Numbers

You can enter the person's **DOC PID Number** or **Badge Number** in the top section of the name record, or you may enter it under the **Numbers** tab, where you can include notes associated with the number.

Note: Do not enter the docket number of a case in the name record.

Relationships

The **Primary Relationships** and the **Secondary Relationships** tabs display how people are related to one another in their personal lives. When a name record is related to the current record, the related name record becomes a hyperlink. Click the hyperlink or press Enter to open a linked name.

When a primary or secondary relationship is entered in a name record, the related name record is automatically updated.

The following relationships can be identified in JustWare Defender.

- Alias
- Child
- Dating Relationship
- Employer
- Ex-Boyfriend
- Ex-Girlfriend
- Ex-Spouse
- Grandparent
- Guardian
- Maiden Name
- Married Name
- Other – Put in Notes
- Parent
- Relative
- Roommate
- Sibling
- Spouse
- Ward

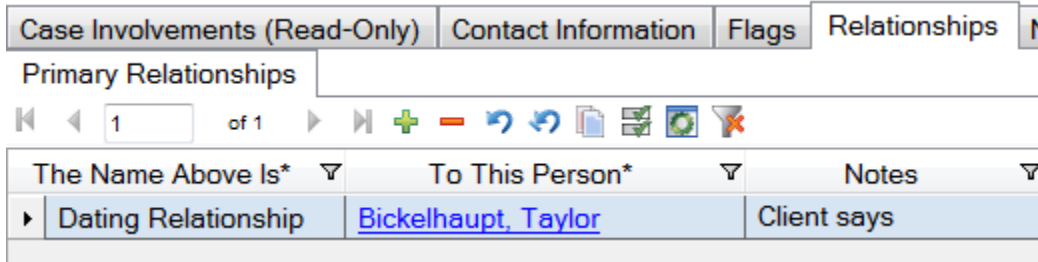
Note: Enter **Primary Relationship** information in the current name record, and it is shown as **Secondary Relationship** in the related name record.

To Create a Primary Relationship:

- Click on **Relationships** Tab
- Add a line (by clicking the Green Plus Sign)
- In the **The Above Name is** field choose the relationship of the person whose name record you are in from the dropdown (or type first letter of relationship and press Tab) to the person you are adding as a primary relationship.

- In the **To This Person** field either type the person's name and press Tab or Enter, or click on one of the search buttons to search for the name.
 - If the name is found, click on the name and it is added to the current record.
 - If the name is not found, create a new name record: under **Actions**, click **New Name**. Complete the name record (as indicated above). Then click **Relate Name** under **Actions**, or **press Ctrl-S** (to save the new name record and relate the name to the current name record).

The **Relationships** tab with a primary relationship entered:



Note: any relationship information will be identified in a red notice underneath a name record shown in a search.

Save the record

Click on File, Save Name, or Actions, Save Name

Press Ctrl-S

Name Summary

This tab provides a report showing the name information, contact information, name notes, and case involvements. You can also access the same report under **Reports, Name Summary**.

Case Involvements, the first tab, is a read-only tab showing any cases that the person is involved in, and how they are involved (client, witness, etcetera).