

## Quick Add Case Search

- Go to menu item “Tasks” - “Quick Add Case” (see screenshot below)
- Important:** if there are more than three children or more than one father, then it is best to use the “Add Appointment Case” menu item, instead of this Quick Add Case. Also, it is best to select an attorney in the “For Attorney” dropdown, because it will default the following on the Add page: Attorney, Judge, Dept, Petition Type, Hearing Type and Date.
- Required Fields:**
  - Agency:** if the user only belongs to one agency then it will default their Agency
  - Either a Case# or the Mother’s Last Name and First Name.** However, it is best to enter all the children and their Case #s, and the Mother and the Father, so the search process can attempt to locate cases that have any of the matching names or Case #s, and display them in the Search Result.
- Other Processes:**
  - If the user is an attorney, then it will default their name in the “For Attorney” dropdown
  - Enter the search criteria and then use the “Search” button.
  - The Search Result section returns all cases having an exact same Last Name and First Name or an exact same Case #. This helps the user decide whether to continue adding the case or use the JCATS # hyperlink to route to an already existing case. It also helps inform the user about possible conflicting cases that exist in other agencies within their agency group. If you choose to continue adding the case, then you need to use the “Bypass Search Results/Add New Case [1]” button, which routes to the Quick Add Case page (see next page).
  - If no matches are found, then it will automatically go to the Quick Add Case page (see next page)

Inquiry
Administration
Tasks
Jcats Admin 1

Case Name	Case #	Appt. Date	Status	Attorney	JCATS #	Quick Add Case Search
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Quick Add Case Search

Agency

FJI Demo

For Attorney

Attorney, FJI Demo (FJI Demo)

	Last Name (Exact)	First Name	DOB	OR Case #
Child 1	Green	George		ABC123
Child 2				
Child 3				
Mother	Green	Gemma		
Father 1				
Father 2				

Search Result For FJI Demo (1)

JCATS #	Agency	Case Role	Last Name	First Name	DOB	Gender	Case #	Close Date	Attorney
<a href="#">60468169</a>	FJI Demo	Mother	Green	Gemma	10/10/1990	F	2222222		Attorney, FJI Demo

Showing 1 to 1 of 1 entries

Previous 1 Next

Search
Bypass Search Results/Add New Case [1]

## Quick Add Case

- The process routes to this page from the Quick Add Case Search page
- Important:**
  - Clients:** If clients are a sibling group then remember to check the client checkbox for each of your clients. If you forget to do this, or you checked the wrong person as your client, then you can correct this later using the Client checkbox on the Edit Person page, which is accessed via the person's name on the Main page.
  - Dates:** since the Appt Date, Ptn File Date, and Hearing Date are defaulted to today's date, remember to change these dates when back entering a case. If you forgot to do this, then you can correct this later using the following edit pages: Edit Case, Edit Petition, Edit Hearing, Edit Person (Role Start Dates), Edit Associations (Association Start Dates), and Address and Placements (Address Start Dates).
- Fill in the necessary data elements and then use one of the buttons to save the case. JCATS will let you know if you have omitted any required elements.
- The "SS" checkboxes are for those that are Spanish Speaking
- The Address checkboxes are for those residing at either the selected Placement Address or and address entered for Address Street, City, State, Zip.
- The Address Street field incorporates an address lookup, based on the state, as you are typing. If you selected an address, then it will automatically populate the City and Zip Code fields as well.
- Hearing Dept and Hearing Officer need NOT be entered if they are the same as the Case Judge and Case Dept.
- Upon clicking one of the "Save" buttons, if all validation are passed, then you'll be routed to the Main page for the case you just created.

Quick Add Case										
Client	Case #	Role	Last Name	First Name	DOB	Gender	Association to Children	SS	Address	
<input type="checkbox"/> Parent 1		Mother	Green	Gemma		F	MO (Mother)	<input type="checkbox"/>		
<input checked="" type="checkbox"/> Child 1	ABC123	Child	Green	George				<input type="checkbox"/>		
Appt Date		IsPanel	Case Judge	Case Dept	Case Referral Source			Attorney	Designated Day	
07/03/20		<input type="checkbox"/>	Judge, Assigned	401 (Alamec)				Attorney, FJI Demo		
Ptn File Dt		Ptn Type	Allegation 1	Allegation 2	Allegation 3	Allegation 4	Physical File Name			
07/03/20		300 Original								
Hearing Type		Hearing Date/Time			Hearing Dept	Hearing Officer	Appearing Attorney			
Arraignment/Detention		07/03/2020 8:30 AM								
Note type		Subject			Note					
Placement Address				OR Address Street	City	State	Zip Code	Address Phone		
				Enter a location		California				
Client	Case #	Role	Last Name	First Name	DOB	Gender	Association to Children	SS	Address	
<input type="checkbox"/> Child 2		Child						<input type="checkbox"/>		
<input type="checkbox"/> Child 3		Child						<input type="checkbox"/>		
<input type="checkbox"/> Parent 2		Father						<input type="checkbox"/>		
<input type="checkbox"/> Parent 3		Father						<input type="checkbox"/>		

Save/Main
Save/Add Another Case [1]