



UNITY

Uniform Nationwide Interstate Tracking for Youth

UNITY ICJO/JPS/JPO User Manual General Overview

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Acronyms

Acronyms	Description
ICJ	Interstate Compact for Juveniles
UNITY	Uniform Nationwide Interstate Tracking for Youth
ICJO	State Compact Office Staff
JPS	Juvenile Parole/Probation Supervisor
JPO	Juvenile Parole/Probation Officer
SS	Sending State
RS	Receiving State

Introduction

Welcome to the Uniform Nationwide Interstate Tracking for Youth (UNITY) System

The UNITY System is a browser-based system that tracks interstate juvenile movement. UNITY has a user-friendly interface and intuitive workflows that enable the fifty states and two territories that have adopted the Interstate Compact for Juveniles (ICJ) to manage workflow and communications, as well as provide consistent service to juveniles. UNITY is the approved electronic information system by which all compact transactions are required to be transmitted by State Compact Office Staff (ICJO), Juvenile Parole/Probation Supervisors (JPS), and Juvenile Parole/Probation Officers (JPO).

This manual is intended for State ICJO, JPS, and JPO users who are responsible for primary ICJ functions in UNITY and provides a general overview of the system. This document covers the first-time login process, common functions, conventions, and navigational aspects in UNITY, creating and managing juvenile information and case workflows. Users with the ICJO Admin role should review the UNITY State ICJO Administrator Manual to learn more about administrator modules and tasks.

The UNITY ICJO/JPS/JPO User Manual – General Overview includes the following:

- System Login
- Conventions and Navigation
- Home Page
- Profile
- User Directory
- Task Lists
- Juvenile
- Case

Login

Introduction: This chapter provides the user with the information necessary to log in to the UNITY system. Users will also learn the steps for resetting a password, establishing challenge questions, and be given instructions for what to do when the user login fails.

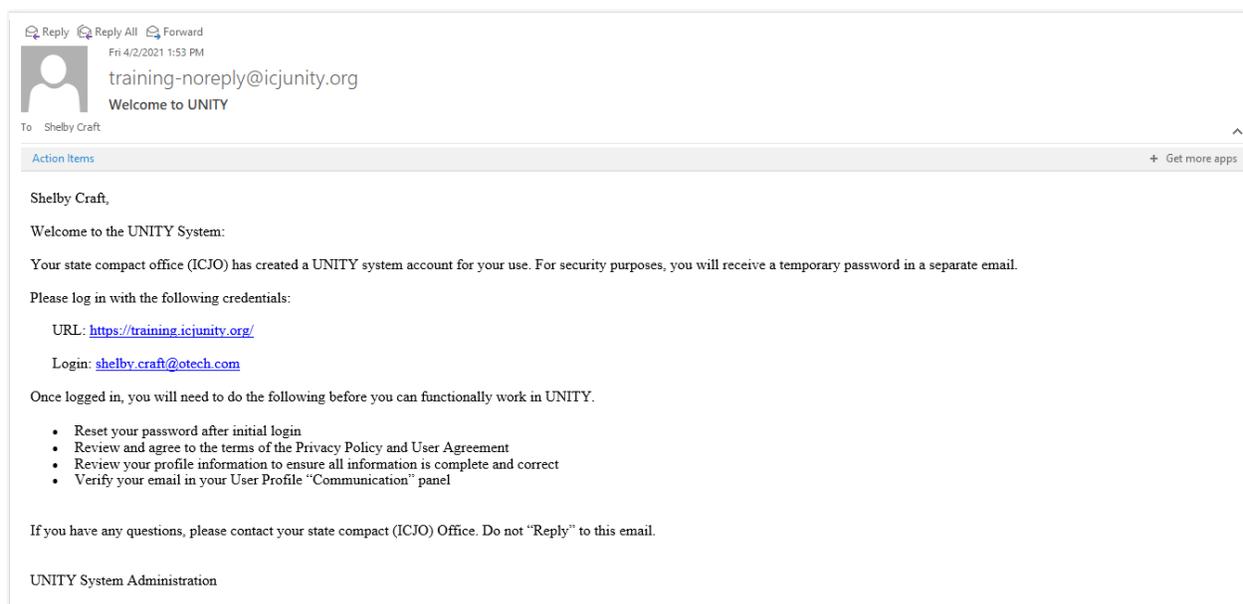
First-Time Login

New users will receive a welcome email from UNITY when their account is set up. The email contains login instructions along with the site address and username. UNITY uses the user's email as the username for authentication. To ensure the user's personal information is secure and only accessed by the user, a temporary password is provided. For security purposes, a separate second email is sent with a temporary password for initial login with your username. First-time login instructions include resetting your password, reviewing and agreeing to the Privacy Policy and User Agreement, reviewing your profile information, and verifying your email address.

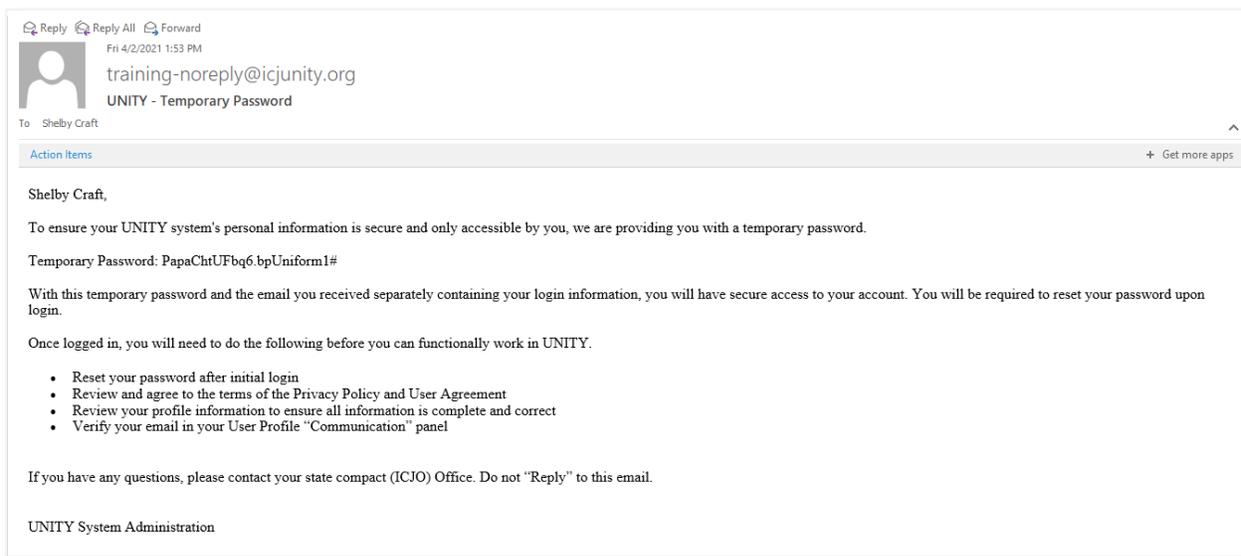
Welcome Emails

A new user receives two auto-generated emails from UNITY when the administrator creates the new user.

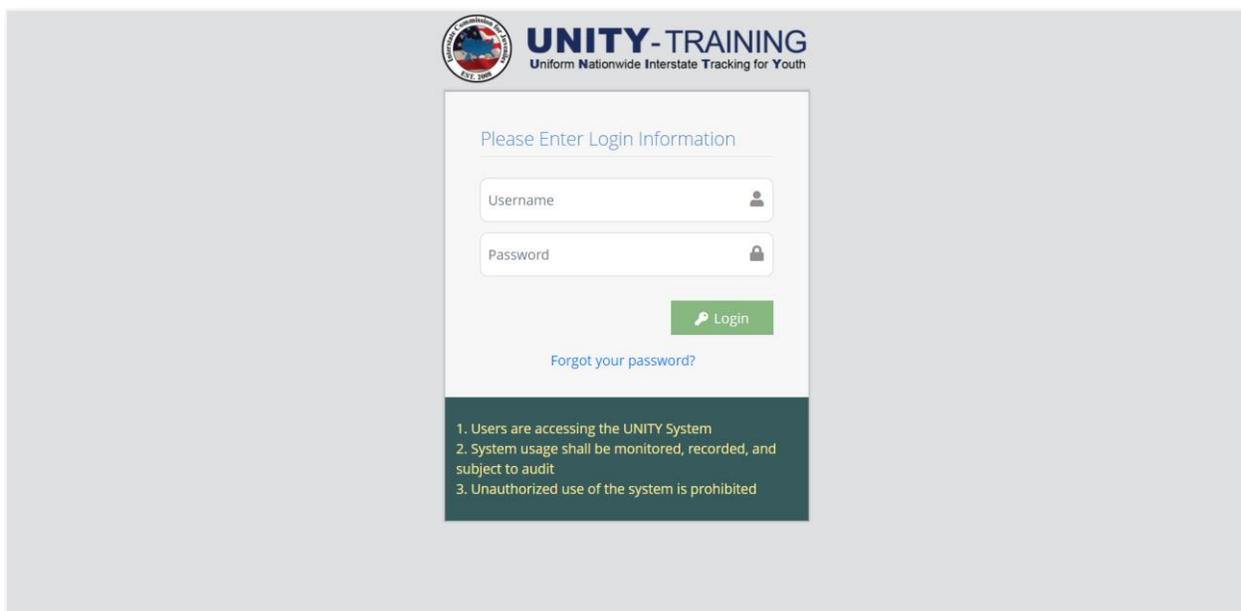
The first email contains the system URL and login.



The second email contains the temporary password and the steps the user must complete after successful login.



Click the URL hyperlink to go to the UNITY System login page.

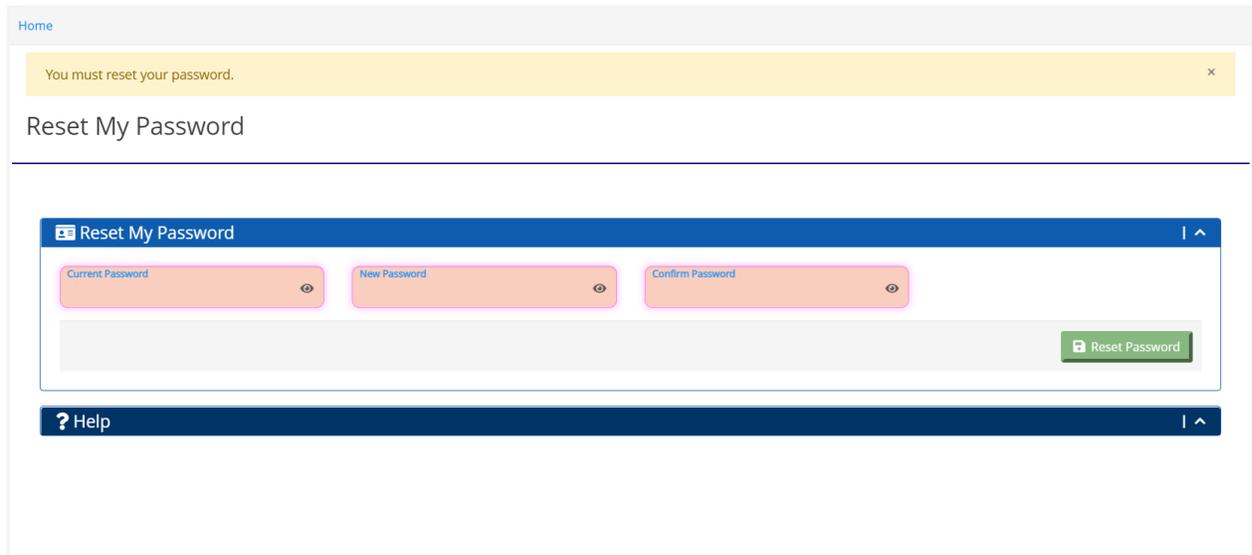


The new user enters the login (email address) and password and clicks the **Login** button.

Note: The password is case-sensitive. For first-time login, it is recommended to copy and paste the password directly from the Welcome email.

Reset Password

If the username and password are valid, UNITY will display the Reset My Password page as shown below.



The screenshot shows a web browser window with a 'Home' tab. A yellow notification bar at the top reads 'You must reset your password.' Below this, the page title is 'Reset My Password'. The main content area contains a form with three input fields: 'Current Password', 'New Password', and 'Confirm Password'. Each field has a red border and a small eye icon to the right. A green 'Reset Password' button is located to the right of the 'Confirm Password' field. Below the form is a dark blue footer bar with a white question mark icon and the text 'Help'.

In the Current Password field, enter the temporary password.

In the New Password field, enter a new strong password. The new password must meet the following requirements:

- Must be at least 8 characters long.
- Requires at least 2 numeric characters.
- Requires at least 2 characters that are upper case letters.
- Requires at least 2 characters that are lower case letters.
- Requires at least 2 characters that are symbols.

Note: If the password is missing a requirement, a red bar appears on the screen indicating which of the password requirements is missing from the new password.

Home

You must reset your password. ×

The password requires at least 2 numeric characters; this had 0. ×
The password requires at least 2 characters that are upper case letters; this had 1.
The password requires at least 2 characters that are symbols; this had 0.

Reset My Password

Reset My Password | ^

Current Password
NovemberRo5!1\$

New Password
Testpassword

Confirm Password
Testpassword

Reset Password

? Help | ^

Re-enter the new password in the Confirm Password field and click the **Reset Password** button. The user receives a confirmation message that the password reset is successful, and is redirected to the User Profile page.

System Consents

When the user clicks the Reset Password button, the Consent page opens. On the Consent page, the user must read and agree to the following published Consents:

- ICJ Administrative Policy 02-2021: UNITY Privacy Policy
- UNITY User Agreement

To agree to each Consent, the user must select Yes on the toggle for each Consent.

Consent: UNITY User Agreement

Uniform Nationwide Interstate Tracking for Youth (UNITY) System
Interstate Commission for Juveniles

END USER AGREEMENT

This UNITY End User Agreement ("Agreement") governs access privileges and the use of the Uniform Nationwide Interstate Tracking for Youth System. By way of this agreement the Interstate Commission for Juveniles ("ICJ") grants you, and you alone, electronic access to UNITY. Access is granted solely for use in accordance with the conditions and limitations outlined in this End User Agreement and the UNITY Privacy Policy ("Privacy Policy"). By signing this Agreement, you acknowledge that you have received, read and understand both the Agreement and the Privacy Policy and agree to comply with the specified conditions and limitations and any other included directive on the use and operation of UNITY.

If you cannot agree with the conditions specified in either this Agreement or the Privacy Policy, you will not be granted access to UNITY. Your failure to adhere to the conditions outlined may result in the suspension or termination of privileges without notice.

CONDITIONS

By signing this Agreement you agree to the following conditions:

1. You have read and understand both this Agreement and the Privacy Policy.
2. The information provided in your application is true and accurate.
3. Access to UNITY is necessary to the performance of your duties.
4. Your right to use UNITY is exclusive to you. You may not authorize others to use your access.
5. You shall not use or divulge UNITY data for your personal interest, gain or exploitation or for the personal interest, gain or exploitation of any other individual, and shall not be assigned or otherwise transferred to any other person.
6. When using UNITY you shall not leave it unattended in areas where it might be accessed by unauthorized individuals.
7. You shall not access UNITY on public computers.
8. You shall not divulge UNITY data to any person not authorized to receive it.
9. You shall not copy, reproduce, duplicate, modify, adopt or lend, sell or otherwise transfer, in whole or part, any information contained in UNITY, except for the specific business use authorized by ICJ.
10. All information you enter or attach is true, accurate, verified, current and complete to the best of your knowledge.
11. You agree not to disrupt, interfere, alter or tamper with any information or materials associated with UNITY use.
12. You agree to report any suspicious activity or known security or user violations to the National Office for the Interstate Commission for Juveniles. You agree to in no way change UNITY software, or to in any way decompile, disassemble or imitate any part of UNITY software.

By selecting "Agree," you acknowledge that you have read the UNITY Privacy Policy and End User Agreement and agree to be bound by the terms and conditions set forth. You agree to use UNITY for lawful purposes only and you acknowledge that your failure to do so may subject you to civil and criminal liability. If you do not agree to the terms and conditions of this agreement, you may not access, view, obtain services from, or otherwise use UNITY.

Agree:

Click the **Agree** button to agree to all Consents.

Home

Consent: ICJ Administrative Policy 02-2021: UNITY Privacy Policy

Consent: UNITY User Agreement

If the user does not agree to each Consent or clicks the **Disagree** button, the user cannot gain access to the UNITY system.

Home

Consent: ICJ Administrative Policy 02-2021: UNITY Privacy Policy

Consent: UNITY User Agreement

When the user clicks the **Agree** button on the Consents page, the My Profile page opens. The user should review the profile information to ensure all information is complete and correct.

My Profile

User

Demographics

Login Name: IllinoisIQO

First Name: CompAd Middle Name: Last Name: Jones

Job Title: Compact Admin User Role: IQO Admin

Time Zone: Eastern Standard Time Zone: 1 Aspen Drive

Last Password Reset Date: 1/21/2021 [Reset Password](#) Locked: Not Locked

Task Grid Preferences

Show Assigned To Show Zone Show Completed By Show Completed Date

Communication

Email: Robert.Paton@potech.com [Email Verified](#) Needs to be Verified [Verify Email](#)

Email Notifications

Mobile Phone Number: 614-743-8178 Work Phone Number: 614-547-0032

Email To Text:

Out of Office

Out of Office

Out of Office Start Date: mm/dd/yyyy Out of Office Contact User: Out of Office End Date: mm/dd/yyyy

Challenge Questions

Question: What was your favorite place to visit as a child? Who is your favorite actor, musician, or artist? What high school did you attend?

[New User Challenge Question](#)

[Save](#)

Click the **Save** button to save any changes made to the User Profile.

My Profile

User

Demographics

Login Name: shelby@potech.com

First Name: Shelby Middle Name: Last Name: Craft

Job Title: JPO User Role: JPO

Time Zone: Central Standard Time Zone: Boone County Probation

Last Password Reset Date: 3/26/2021 [Reset Password](#) Locked: Not Locked

Task Grid Preferences

Show Assigned To Show Zone Show Completed By Show Completed Date

Communication

Email: shelby.craft@potech.com [Email Verified](#) Needs to be Verified [Verify Email](#)

Email Notifications

Mobile Phone Number: Work Phone Number:

Email To Text:

Out of Office

Out of Office

Out of Office Start Date: mm/dd/yyyy Out of Office Contact User: Out of Office End Date: mm/dd/yyyy

Challenge Questions

Question: No data available

[New User Challenge Question](#)

[Save](#)

Verify Email Address

The user is required to verify the entered email address.

Communication

Email
shelby.craft@otech.com

Email Notifications

Mobile Phone Number

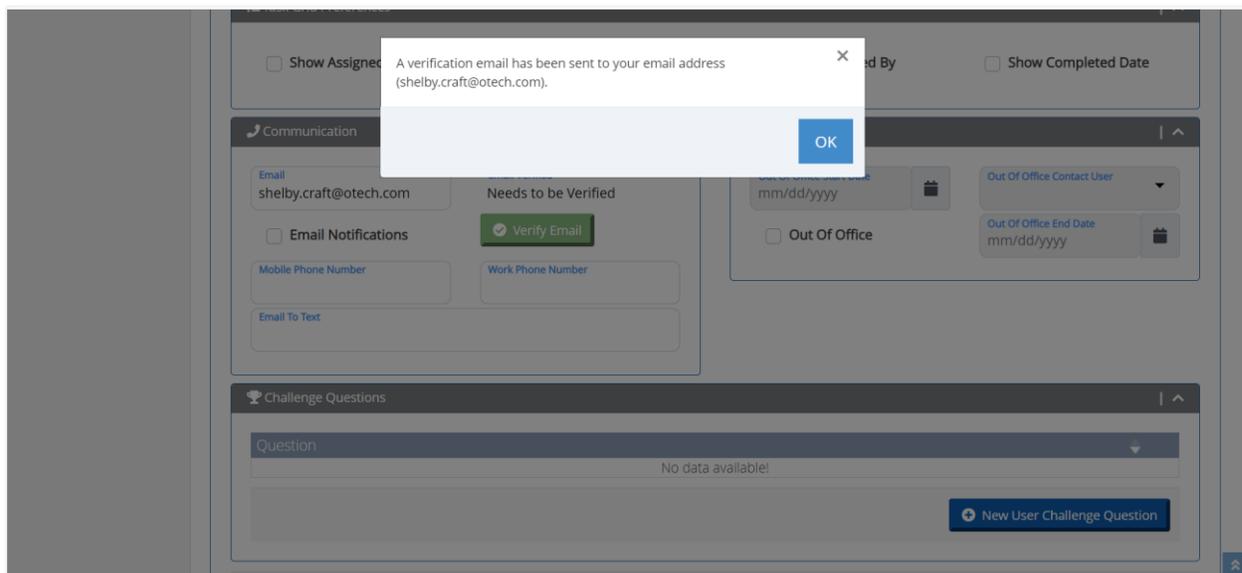
Work Phone Number

Email To Text

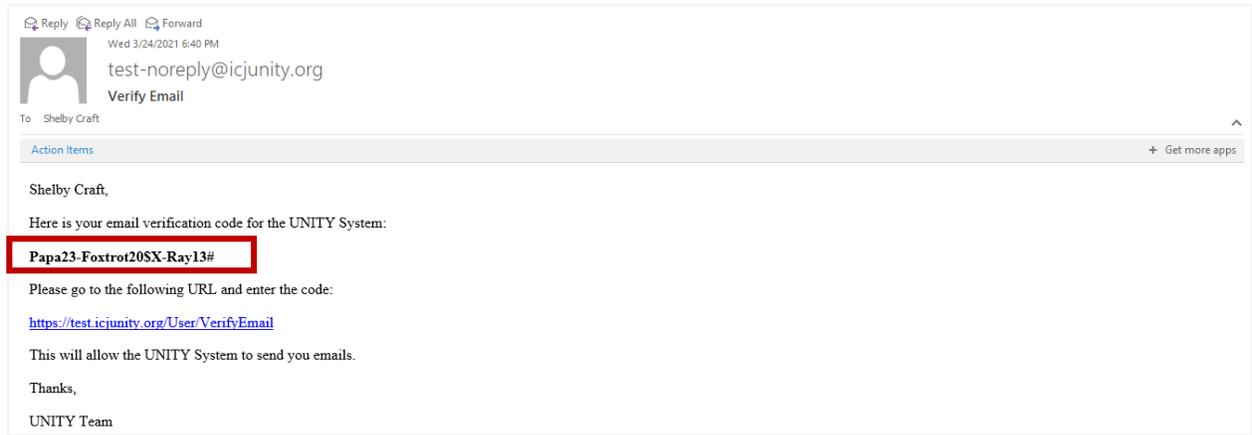
Email Verified
Needs to be Verified

Verify Email

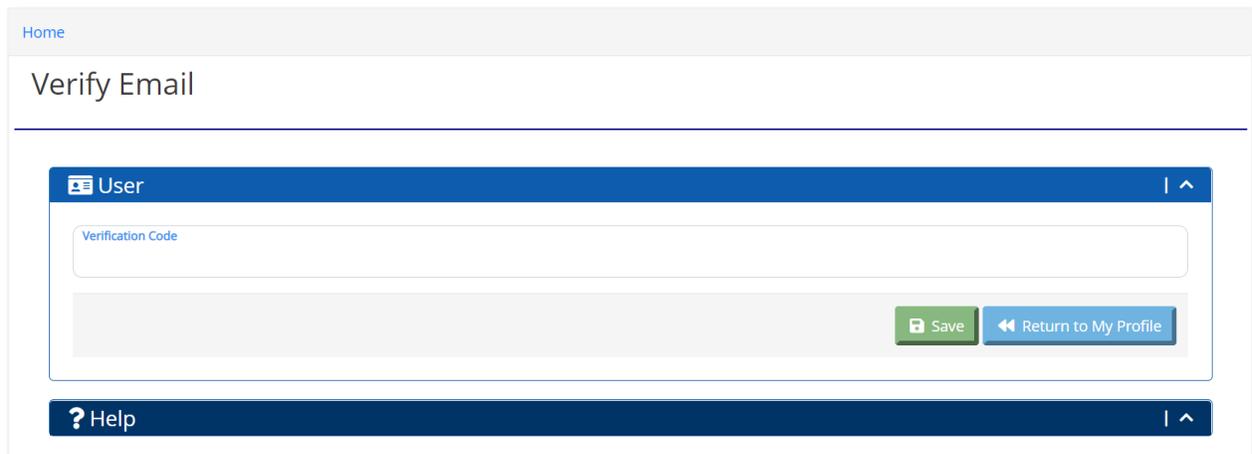
When the user clicks the **Verify Email** button, the user receives a message that a verification email was sent to the entered email address.



The user receives an email from UNITY that contains the email verification code.



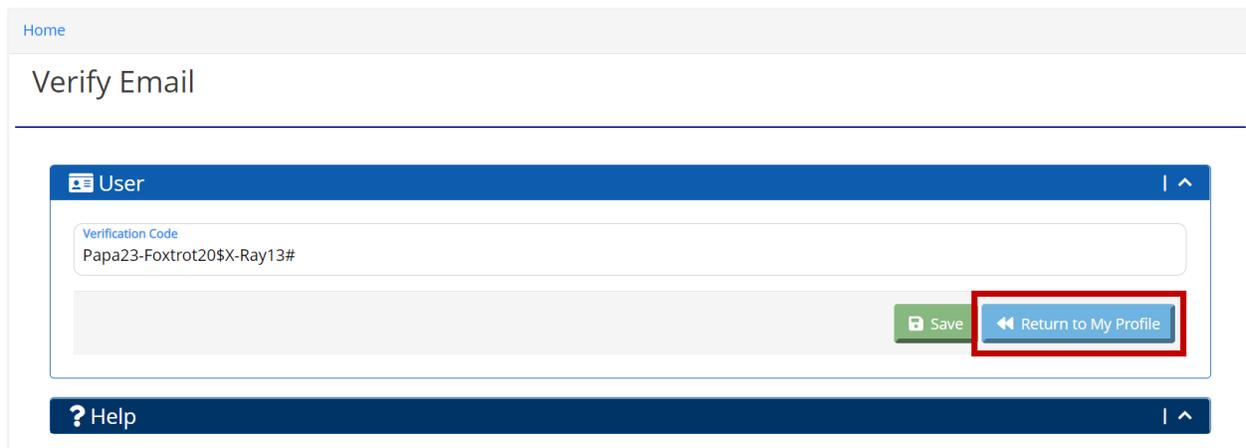
When the user clicks the URL hyperlink in the email, the user returns to UNITY and the Verify Email page opens.



Enter the Verification Code from the email and click the **Save** button.

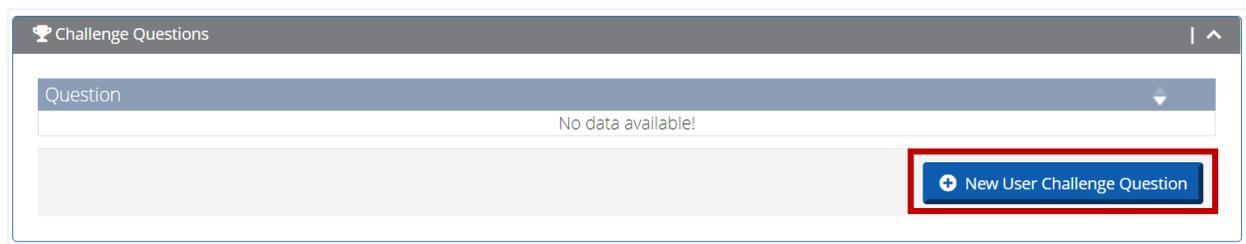


To return to the My Profile page, click the **Return to My Profile** button.



Add Challenge Questions

The user must set up challenge questions to reset the password from the Login page. In the Challenge Questions sub-section, the user can click the **New User Challenge Question** button to set up a new challenge question.



When the user clicks the **New User Challenge Question** button, the New User Challenge Question page opens.

Home

New User Challenge Question

Edit Challenge Question | ^

Question: What was your favorite place to visit as a child?

Answer:

[Return to User Profile](#)

? Help | ^

The user can select a question from the Question dropdown and provide an answer in the Answer field. The user can click the **Save User Challenge Question** to save the challenge question.

New User Challenge Question

Edit Challenge Question | ^

Question: What high school did you attend?

Answer: Elida

[Save User Challenge Question](#) [Save User Challenge Question And Add New](#) [Return to User Profile](#)

? Help | ^

To save the entered challenge question and enter a new question and answer, click the **Save User Challenge Question and Add New** button.

New User Challenge Question

Edit Challenge Question

Question: What high school did you attend?

Answer: Elida

[Save User Challenge Question](#) [Save User Challenge Question And Add New](#) [Return to User Profile](#)

[? Help](#)

To return to the My Profile page, click the **Return to User Profile** button.

New User Challenge Question

Edit Challenge Question

Question: What high school did you attend?

Answer: Elida

[Save User Challenge Question](#) [Save User Challenge Question And Add New](#) [Return to User Profile](#)

[? Help](#)

On the My Profile page, the Challenge Questions appear in the Challenge Questions section.

Challenge Questions

Question	
What high school did you attend?	View Delete
What is your mother's maiden name?	View Delete
What was your high school mascot?	View Delete

[+ New User Challenge Question](#)

To view the Challenge Question, click the **View** button. When the user clicks the View button, the Edit User Challenge Question page opens.

Home

Edit User Challenge Question

Edit Challenge Question | ^

Question
What high school did you attend?

Answer
Elida

[Save User Challenge Question](#) [Return to User Profile](#)

Changes | ^

Help | ^

The user can edit the answer to the challenge question and click the **Save User Challenge Question** button to save the change.

Home

Edit User Challenge Question

Edit Challenge Question | ^

Question
What high school did you attend?

Answer
Elida

[Save User Challenge Question](#) [Return to User Profile](#)

Changes | ^

Help | ^

Click the **Return to User Profile** button to return to the My Profile page.

Home

Edit User Challenge Question

Edit Challenge Question | ^

Question
What high school did you attend?

Answer
Elida

[Save User Challenge Question](#) [Return to User Profile](#)

Changes | ^

Help | ^

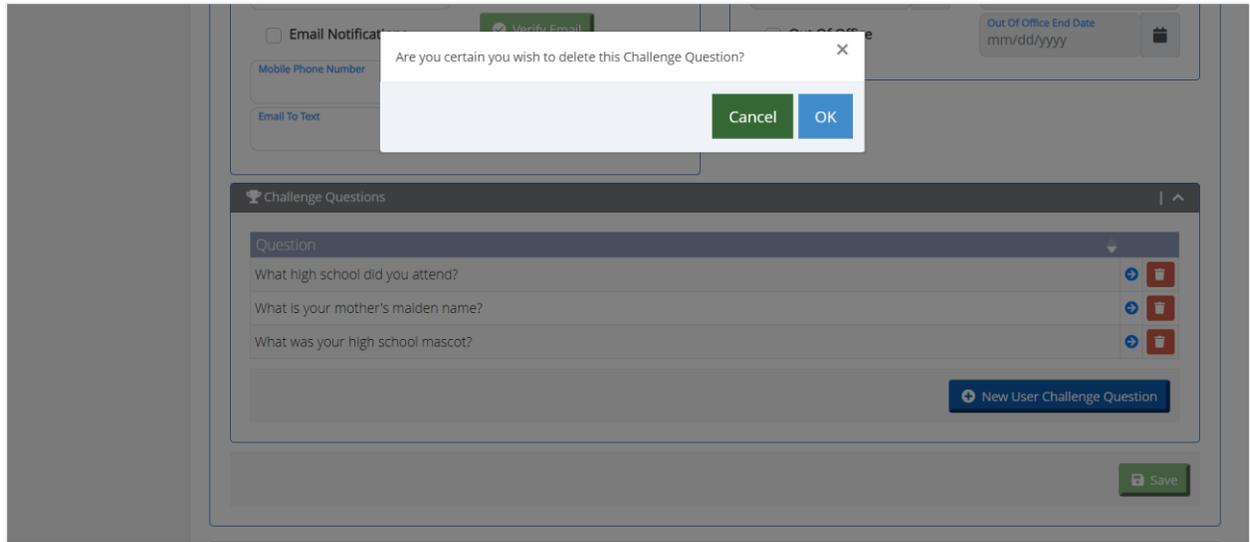
To delete a challenge question, click the **Delete** button in the Challenge Question subsection.

Challenge Questions | ^

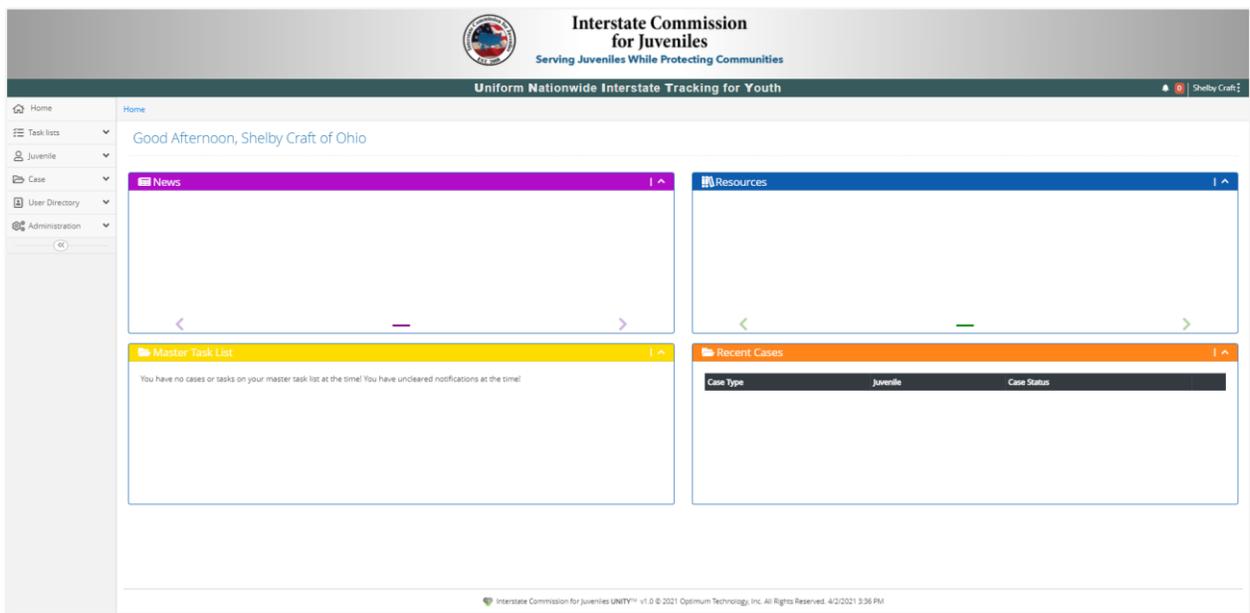
Question	
What high school did you attend?	+ - Delete
What is your mother's maiden name?	+ - Delete
What was your high school mascot?	+ - Delete

[+ New User Challenge Question](#)

When the user clicks the **Delete** button, the user receives a message to confirm deleting the Challenge Question. To delete the Challenge Question, click the **Yes** button. To keep the Challenge Question and return to the My Profile page, click the **Cancel** button.



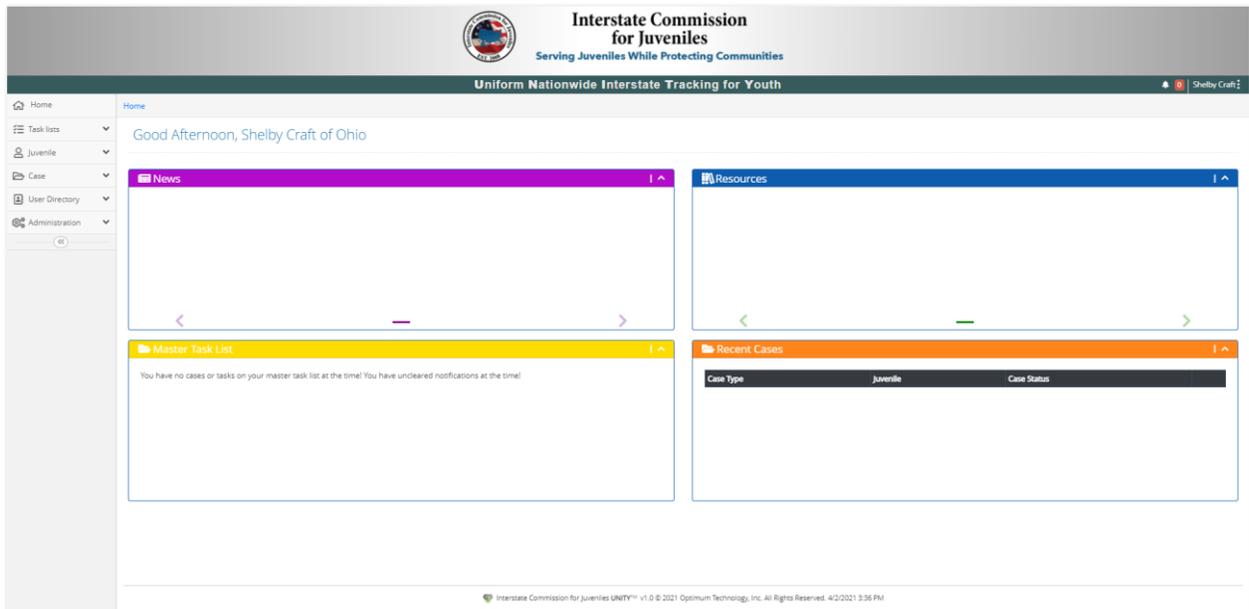
The user can click on Home in the Menu Bar to access the UNITY Home page.



Note: After the first login, the user sees the Home Page after entering a correct username and password.

Successful Login

After the first-time login, the user can go directly to the Login page and enter the username and password. If the user and password are valid, the user is logged into the UNITY system and will see the Welcome/Home Page.

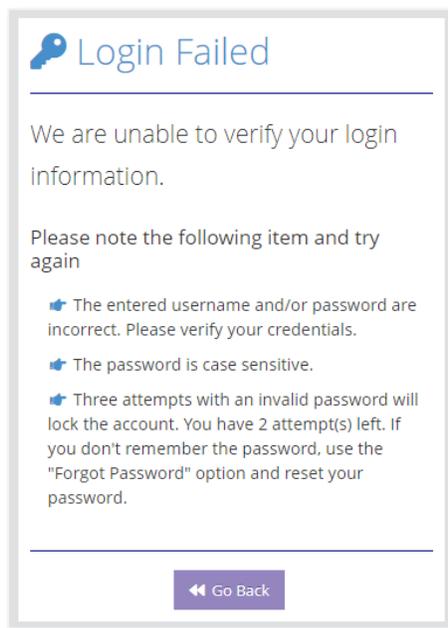


Failed Login

UNITY has built-in security features, including account security locks. Accounts are locked after 3 unsuccessful login attempts. An unsuccessful login attempt will result in a Login Failed message. The user can return to the login screen and try again. On the third unsuccessful login attempt, the account is locked. This means that the account is inaccessible for 10 minutes. After 10 minutes have passed, the user can try logging in again with the correct password. If the user enters the incorrect password again, the account will lock immediately for 10 minutes again without allowing retries. For security reasons, the number of invalid logins will increment after every invalid login attempt. After every successful login, the number of invalid logins count will reset to 0 for the user. The user will then be allowed 3 unsuccessful login attempts until the account gets locked again.

If the user has set up challenge questions, the Forgot Password feature can be used to reset the password or contact the State ICJO administrator to immediately unlock the account. The State ICJO can also reset the user's password to prevent further account locks due to incorrect passwords.

If the username and password are not valid, the user sees the Login Failed screen.

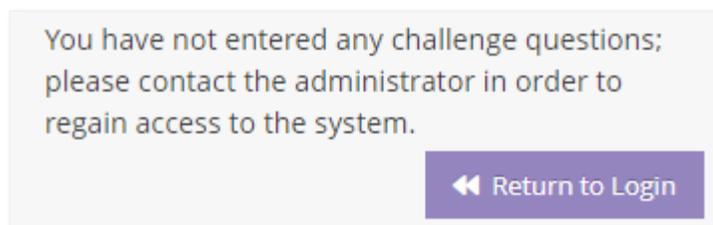


The user can click the Go Back button to re-enter the username and password. If the user enters the incorrect username and password three times, the account is locked. The user must contact the UNITY administrator to unlock the account or wait 10 minutes to log in again.

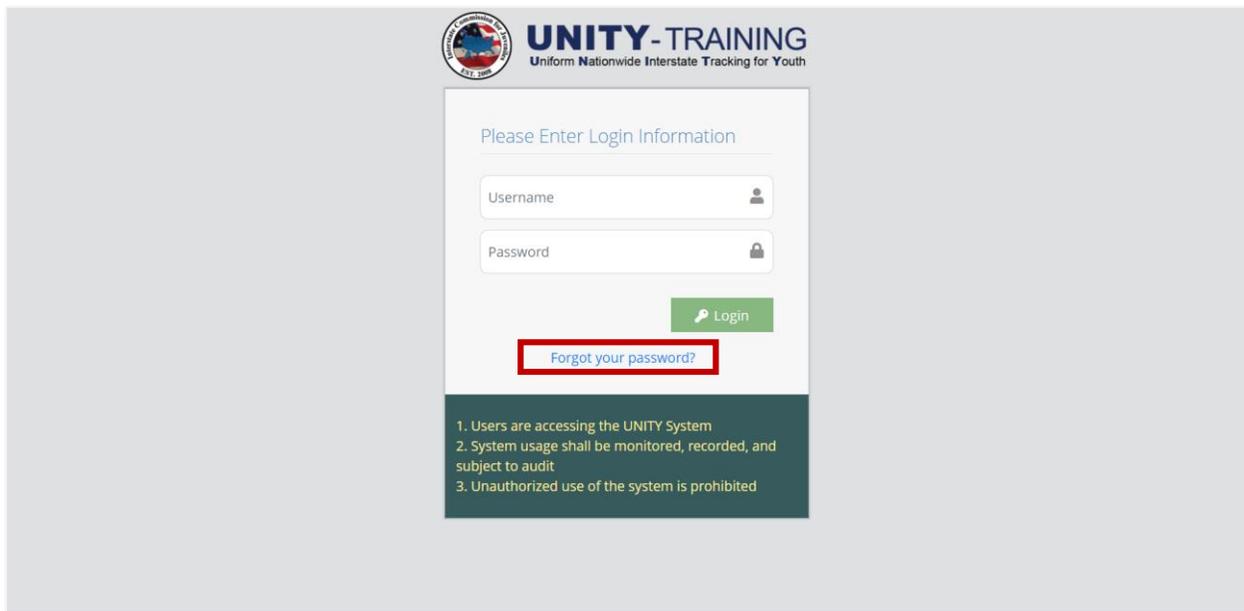
Note: It is recommended that the user select the Reset Password button on the login page if the user cannot remember the correct password.

Password Reset

If the user registered Challenge Questions in UNITY, the user can reset the password from the Login page at any time.

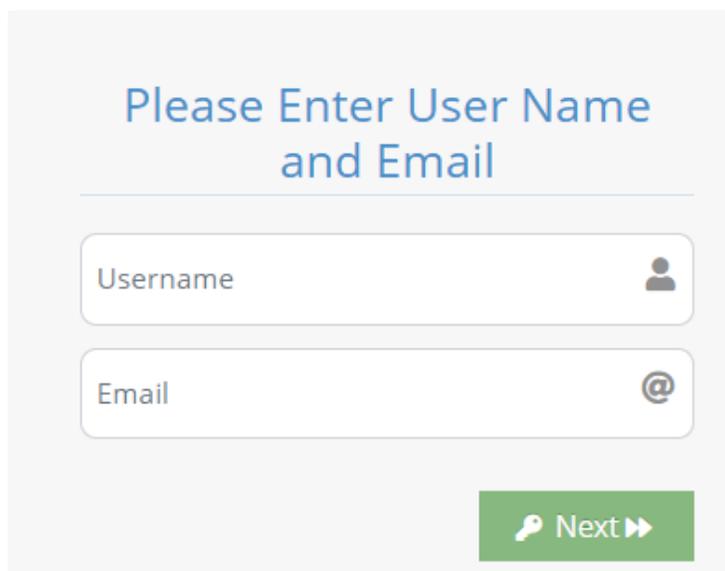


On the Login page, the user clicks the Forgot Your Password button.



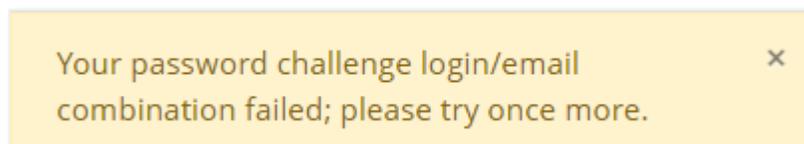
The image shows the login interface for the UNITY-TRAINING system. At the top left is the logo for the Department of Justice, Office of Justice Programs, and the text "UNITY-TRAINING Uniform Nationwide Interstate Tracking for Youth". The main heading is "Please Enter Login Information". Below this are two input fields: "Username" with a person icon and "Password" with a lock icon. A green "Login" button is positioned below the password field. A red-bordered box highlights the text "Forgot your password?". At the bottom, a dark green box contains three numbered items: "1. Users are accessing the UNITY System", "2. System usage shall be monitored, recorded, and subject to audit", and "3. Unauthorized use of the system is prohibited".

On the next screen, enter the username and email address and click the **Next** button.



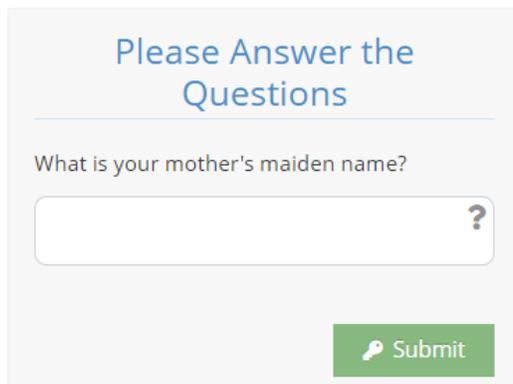
The image shows a screen titled "Please Enter User Name and Email". It features two input fields: "Username" with a person icon and "Email" with an @ symbol icon. A green "Next" button with a right-pointing arrow is located at the bottom right.

If the username and email combination are invalid, the user will see the pop-up below and must re-enter the username and email.



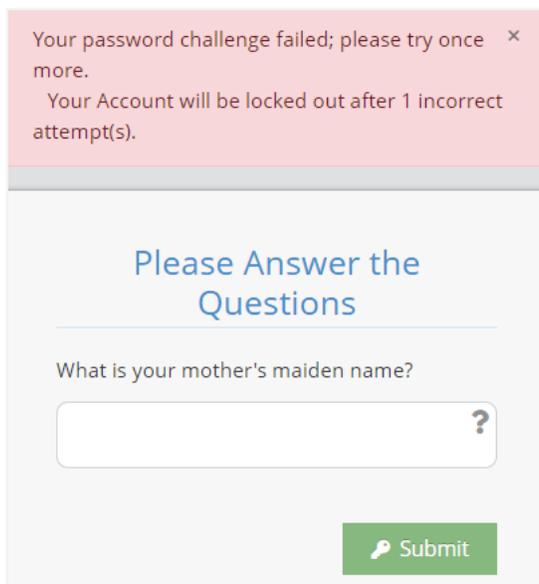
Your password challenge login/email combination failed; please try once more. ×

If the username and email combination are valid, and the user registered a challenge question, the user must enter the answer to the Challenge Question and click the **Submit** button.



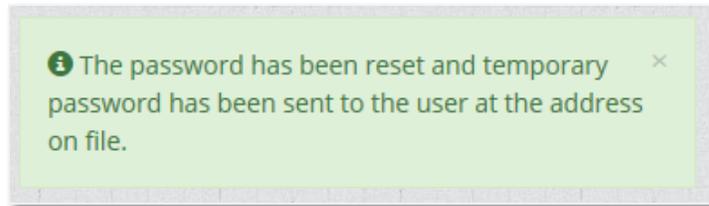
The screenshot shows a light gray form titled "Please Answer the Questions" in blue. Below the title is a horizontal line. The question "What is your mother's maiden name?" is displayed in gray text. Below the question is a white text input field with a small question mark icon on the right side. At the bottom right of the form is a green "Submit" button with a white key icon.

If the answer is incorrect, the user is prompted to re-enter the answer. The account will lock if the answer is incorrect 2 times. The user will need to contact the ICJO Admin to unlock the account.



The screenshot shows the same "Please Answer the Questions" form as above, but with a red error message box at the top. The error message reads: "Your password challenge failed; please try once more." followed by "Your Account will be locked out after 1 incorrect attempt(s)." The form below the error message is identical to the previous screenshot.

If the answer is correct, a system-generated temporary password is sent to the user's registered email address.



On the Login page, enter the username and the temporary password and click the **Login** button.

A screenshot of the UNITY-TRAINING login page. At the top left is a circular logo with a map of the United States and the text "UNIFORM NATIONWIDE INTERSTATE TRACKING FOR YOUTH". To the right of the logo is the text "UNITY-TRAINING" in bold, with "Uniform Nationwide Interstate Tracking for Youth" underneath. Below the logo and header is a white login form with the heading "Please Enter Login Information". The form contains two input fields: "Username" with a person icon and "Password" with a lock icon. Below the fields is a green "Login" button with a white arrow icon. Underneath the button is a blue link that says "Forgot your password?". At the bottom of the form is a dark green box containing three lines of white text: "1. Users are accessing the UNITY System", "2. System usage shall be monitored, recorded, and subject to audit", and "3. Unauthorized use of the system is prohibited".

The user will be logged into the system and prompted to reset the password.

Home

You must reset your password. x

Reset My Password

Reset My Password | ^

Current Password | New Password | Confirm Password

Reset Password

? Help | ^

Enter the password received in the email as the Current Password. In the New Password field, enter the new password. The new password must contain the following:

- Must be at least 8 characters long.
- Requires at least 2 numeric characters.
- Requires at least 2 characters that are upper case letters.
- Requires at least 2 characters that are lower case letters.
- Requires at least 2 characters that are symbols.

Note: *If the password is missing a requirement, a red bar appears on the screen indicating which of the password requirements is missing from the new password.*

Re-enter the new password in the Confirm Password field and click the **Reset Password** button. The user receives a confirmation message that the password reset is successful.

Password Has Been Reset

After a successful password reset, the user is logged into the UNITY system and will see the Welcome/Home Screen.

Logout

The Logout button can be accessed from the blue Header Bar, in the top right corner of the page under the logged-in user's name. Click the username to invoke the dropdown menu with the Logout option. Click on the Logout button to securely log out of the UNITY system.

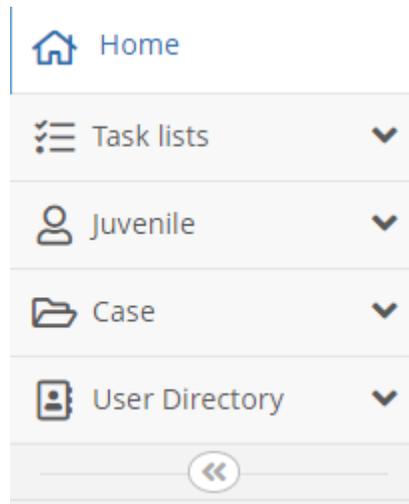
Conventions and Navigation

Introduction: In this chapter, the overall design and general navigation of the UNITY System are discussed. These features are consistent throughout the UNITY System.

Menu Bar

The Menu Bar on the left side of the window displays the main modules of UNITY. The number of Menu Items available is determined by your role within the UNITY System. Screenshots within this guide may show more or fewer sections than the user has available.

Click on a menu item to display its dropdown menu. Modules in the left menu bar may differ based on user permissions or as new modules are added.



The Menu Items for a user with a JPS or a JPO role include:

- Home
- Task Lists
- Juvenile
- Case
- User Directory

Header Bar

The Header Bar is the top blue bar below the ICJ banner image. It features the expanded form of the UNITY system's name – **U**niform **N**ationwide **I**nterstate **T**racking for **Y**outh, along with quick access menu options.

The Header bar on top is always visible with menu options even when the user navigates through other pages of the UNITY system. Clicking on the user's name drops down the following menu options:

1. Profile
2. Resources
3. My Contacts
4. Master Task List
5. Logout



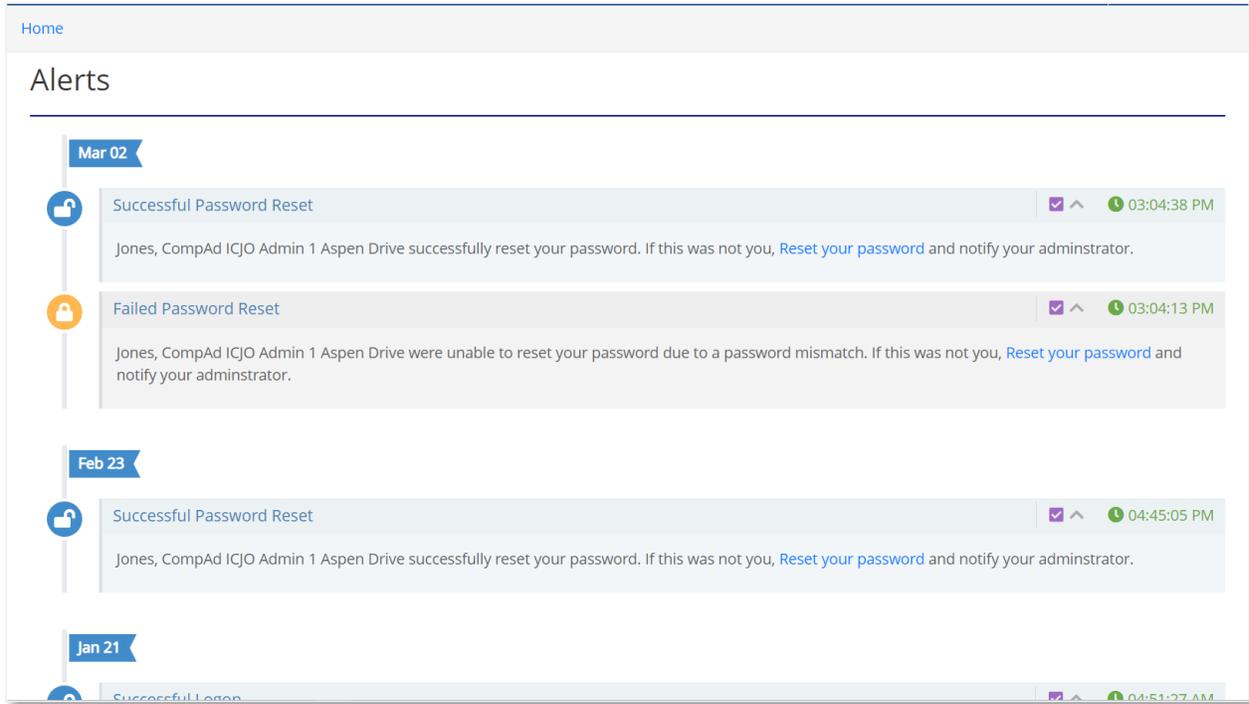
Alerts

Click the bell icon on the top right corner of the Header bar to access Alerts. The number next to the bell icon displays the number of alerts that have not been cleared by the user.

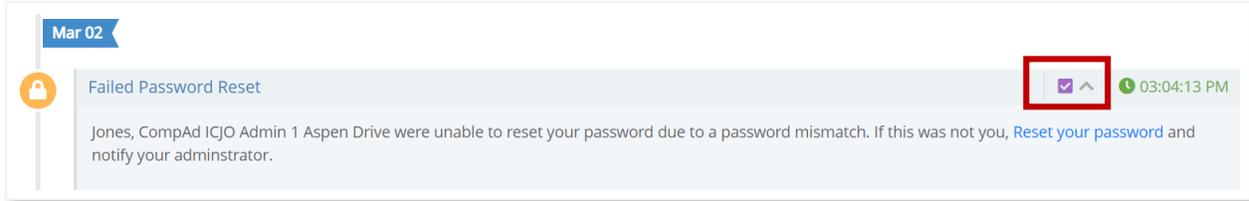


When the user clicks the **Bell** icon, the Alerts page opens.

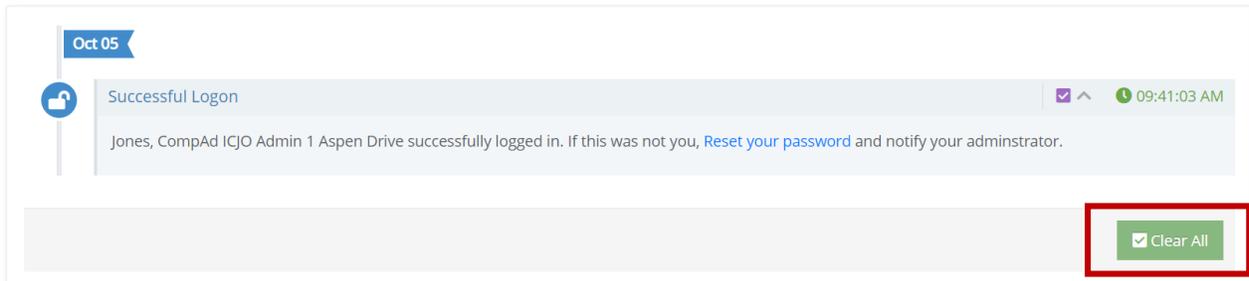
The Alerts page contains system alerts and user notifications to alert the user of any action completed or action needed. This includes system alerts such as password reset notifications as well as case notifications such as assigned tasks, juvenile apprehended, and case submission alerts.



The user can click the **Dismiss** icon to clear the alert from the Alerts page.



The user can click the **Clear All** button at the bottom of this page to clear all alerts from the Alerts page.



Breadcrumbs

Links that are located below the **UNITY** banner are the Breadcrumbs that indicate the navigational path. Breadcrumbs track the navigational path within the UNITY system. This makes it easy to trace the previous pages and navigate backward at any point in time.

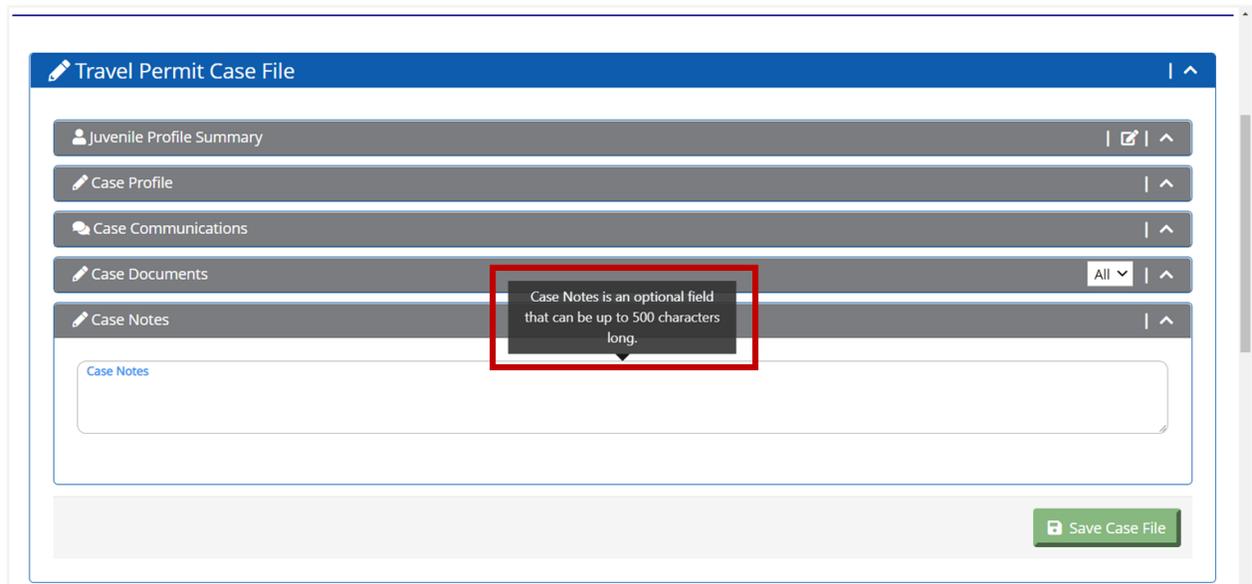


Home :: > Search > View Case

A double colon (::) separates each area to reflect the hierarchy of where you are in the system. To navigate to a particular section, click the name of the section in the navigational path.

Tooltips

There are tooltips available for many fields and controls throughout the UNITY system. When the user hovers over a field that has a tooltip attached to it, a popup box appears that displays information about that specific field. Tooltips are useful to new users that have questions about a specific field or what information to enter into a specific field. Depending on the context where the field appears, the tooltip will describe the purpose of the field, whether user data input is required or optional, data input format, the maximum number of allowable characters within that field, validation criteria, or other useful tips for the user.



Required Fields

All required fields in UNITY are surrounded by a pink halo.



If the field is required and no data is entered, the field is salmon-colored.



Grid Features

The UNITY system features a grid in multiple places to make data presentation, sorting, and searching easier. Each grid has the following features:

Pagination

- The pagination feature on the bottom left corner of the grid allows users to page through the available reports.
- The grayed-out number indicates where the user is currently in the grid. In the above image, the user is currently on Page 1.
- All other white numbers are clickable and will take the user directly to that page of the grid.
- The ">" takes the user to the next page of the grid.
- The ">>" takes the user to the last page of the grid.
- The "<" takes the user to the previous page of the grid.
- The "<<" takes the user to the first page of the grid.



Go to Page Dropdown

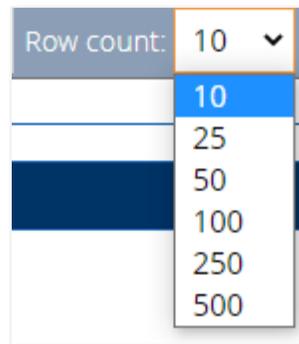
The 'Go to Page' dropdown feature next to the pagination grid allows a user to select and access a specific page. The user can type the page number, or select from the dropdown. Typing or selecting the page number will directly take the user to that page in the grid.



Row Count Dropdown

The 'Row Count' Dropdown allows the user to select the number of records to show on one page.

Selecting a different row count from the dropdown allows the user to view the specified number of rows on the page.



Row Numbers

The row numbers indicator is visible on the bottom right of the grid. The user can see the total number of rows in the grid, and the number of rows currently visible.

Showing 1-10 of 314

Collapse

The user can collapse the grid by clicking on the upward arrow in the top right corner of the grid, and make it visible again by clicking on the downward arrow.



Changes

The Changes section appears at the bottom of some pages in UNITY that involve updating data fields such as the My Profile page and Juvenile page. The Changes section lists all the changes made on the page. Changes are grouped by date and time in reverse chronological order along with a summary of the data updated.



Help

On the bottom of every page in UNITY, there is a Help section. The Help section contains the contact information for the logged-in user’s State ICJO administrators that the user can contact for assistance.

An online Support Request form is available for users to ask a question or report an issue. This state-specific Support link is available in the Help section. The requests are reviewed by the State ICJOs and routed to the ICJ National Office if required.



Home Page

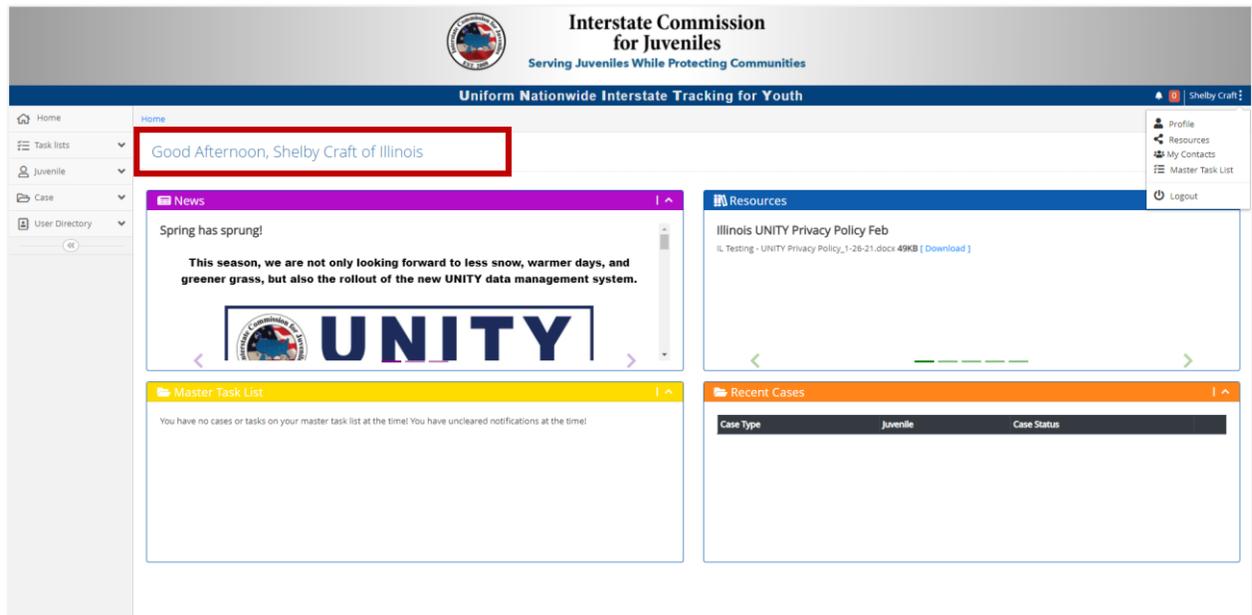
Introduction: The user lands on the Home Page after successfully logging into the UNITY System as discussed in the Login Chapter.

The Home Page displays a welcome message and features a dashboard with the following information:

1. News
2. Resources
3. Master Task List
4. Recent Cases

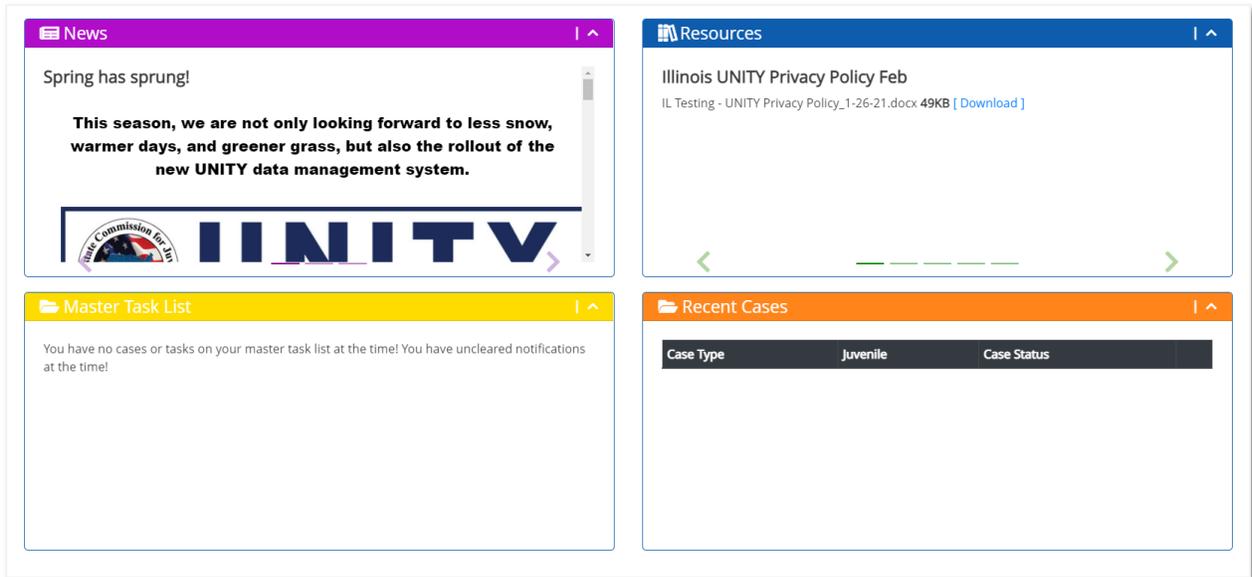
Welcome Message

The Welcome Message displays the Greeting, Name of the User, and User Agency.



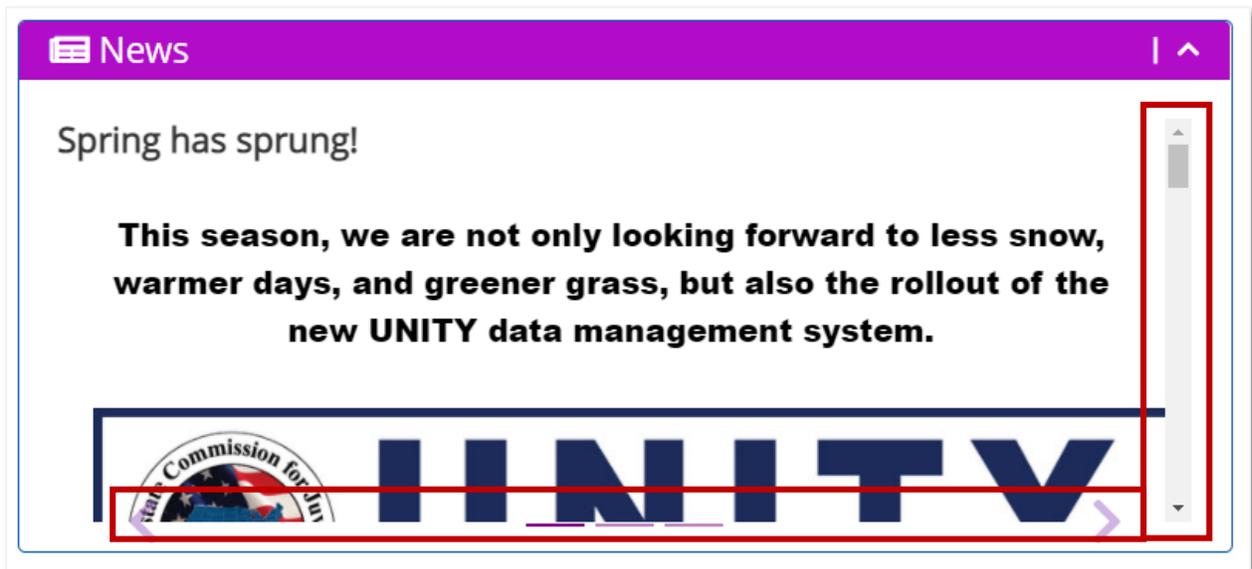
Dashboard

The Homepage contains a Dashboard with News, Resources, Master Task List, and Recent Cases sections.



News

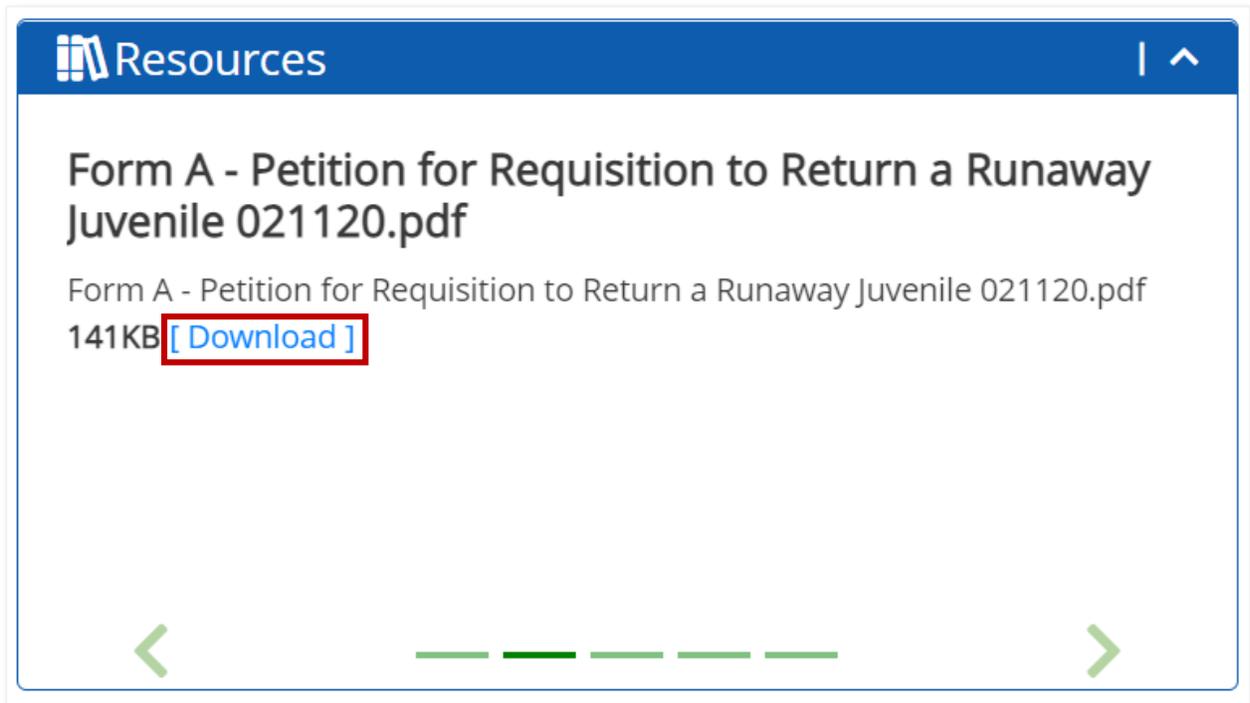
The News section displays current news items published by the National Office as well as your State ICJO Administrator. The user can use the arrow icons at the bottom of the News section to access additional News items and use the scroll bar to read through the news.



Resources

The Resources section contains resources such as user manuals uploaded by the National Office as well as State ICJO administrators. These are available to download from the Resources section for the user's reference.

The user can click the **Download** hyperlink to download and view the resource.



The user can use the arrow icons at the bottom of the Resources section to access additional Resources.

The user can also view all Resources by clicking the user's name in the Header Bar and selecting Resources.

Master Task List

The Master Task List section displays a notification of how many cases and required tasks are available within the Master Task List that need the user's attention and follow-up. The user can click on the hyperlink to go to the Master Task List page for further review and action.

This section also displays a notification of how many alerts are available on the Alerts page that has not been cleared by the user. The user can click on the **Here** hyperlink to go to the Alerts page for further review and action.

Master Task List

Your master task list has **2** cases with **6** required tasks in them; you can view them by clicking [here](#).

You have **9** uncleared alerts; you can view and clear them by clicking [here](#).

Recent Cases

The Recent Cases section displays the top 5 active cases that the user has worked on. The user can click on the View button of each case listed to navigate directly to the View/Edit case page.

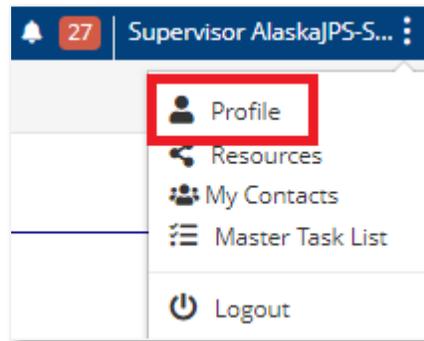
Recent Cases

Case Type	Juvenile	Case Status	
Travel	Carl Craft (3/5/2005)	Active	

Profile

Introduction: The Profile stores demographic details about the user and allows the user to update their information and manage their preferences.

The user can access their user profile by clicking the user name on the top right of the portal, then clicking Profile.



When the user clicks Profile, the My Profile page opens.

 A screenshot of the 'My Profile' page. The page is divided into several sections:

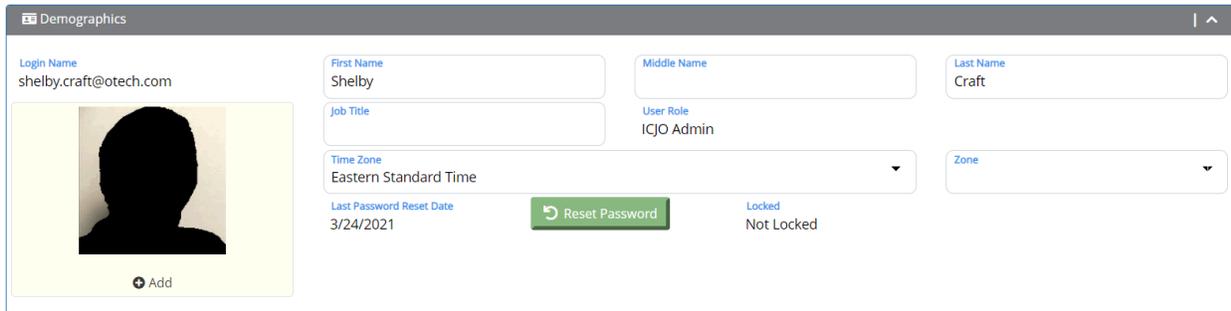
- Demographics:** Includes fields for Login Name (IllinoisJQO), First Name (CompAd), Middle Name, Last Name (Jones), Job Title (Compact Admin), User Role (IQO Admin), Time Zone (Eastern Standard Time), and Zone (1 Aspen Drive). It also shows a 'Last Password Reset Date' of 1/21/2021, a 'Reset Password' button, and a 'Locked' status (Not Locked).
- Task Grid Preferences:** Includes checkboxes for 'Show Assigned To', 'Show Zone', 'Show Completed By', and 'Show Completed Date'.
- Communication:** Includes fields for Email (Robert.Paton@cojoch.com), Email Notifications (unchecked), Mobile Phone Number (614-743-8178), and Email To Test. It also has a 'Verify Email' button.
- Out of Office:** Includes fields for Out of Office Start Date (mm/dd/yyyy), Out of Office Contact User, Out of Office End Date (mm/dd/yyyy), and an 'Out of Office' checkbox.
- Challenge Questions:** Includes a list of questions: 'What was your favorite place to visit as a child?', 'Who is your favorite actor, musician, or artist?', and 'What high school did you attend?'. There are buttons for 'New User Challenge Question' and 'Save'.

On the My Profile page, the user can view and edit information in the following sub-sections: Demographics, Task Grid Preferences, Communication, Out of Office, and Challenge Questions.

After updating details in each sub-section, click the Save button at the bottom of the User section to save any changes made.

Demographics

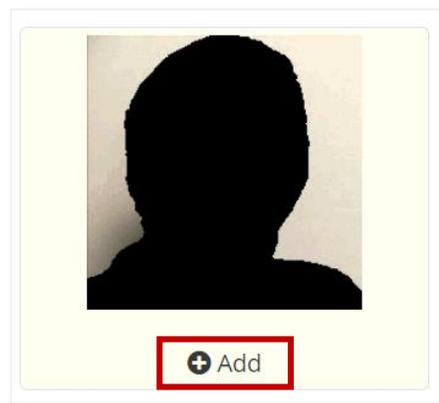
The Demographic sub-section displays the demographic information entered by the administrator during the creation of the user in UNITY. The user can edit all fields in the Demographic sub-section.



The screenshot shows a web form titled "Demographics" for a user profile. On the left, there is a "Login Name" field with the value "shelby.craft@otech.com" and a placeholder photo area with a silhouette and an "Add" button. The main form contains several input fields: "First Name" (Shelby), "Middle Name" (empty), "Last Name" (Craft), "Job Title" (empty), "User Role" (ICJO Admin), "Time Zone" (Eastern Standard Time), and "Zone" (empty). Below these fields, there is a "Last Password Reset Date" of 3/24/2021, a green "Reset Password" button, and a "Locked" status indicator showing "Not Locked".

Add Photo

The user can add a photo to their user profile. To add a photo, click the **Add** icon in the Demographics sub-section.



When the user clicks the **Add** icon, the Upload Photo page opens. The user can choose a saved photo and click the **Save Photo** button.

Home

Upload Photo

Photo Upload

Photo
Choose File | ICJ.png

Return Save Photo

? Help

When the user clicks the **Save Photo** button, the user receives a confirmation message that the photo is saved and the user returns to the My Profile page. The uploaded photo displays in the demographic section.

Demographics

Login Name
shelby.craft@otech.com

First Name
Shelby

Middle Name

Last Name
Craft

State
Illinois

Reporting Agency

Job Title

User Role
ICJO Admin

User Type
Active User

Time Zone
Eastern Standard Time

Supervision Type

Last Password Rese...
3/25/2021

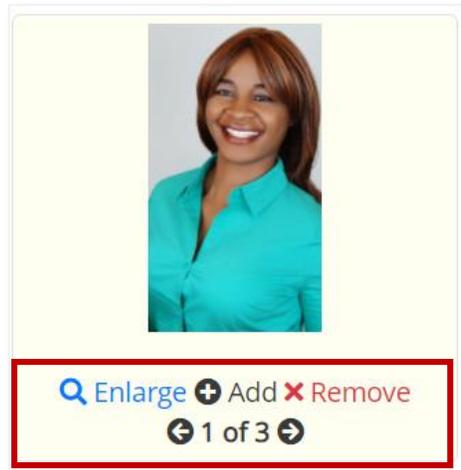
Reset Password

Locked
Not Locked

Lock

Enlarge + Add x Remove
1 of 3

The user has the option to view an enlarged image of the photo, view additional photos, as well as add or remove the photo in the Demographics section.



Reset Password

The user can reset the password in the Demographics sub-section. To reset the password, click the **Reset Password** button.

A screenshot of a user profile form titled "Demographics". The form contains the following fields and controls:

- Login Name: shelby.craft@otech.com
- First Name: Shelby
- Middle Name: (empty)
- Last Name: Craft
- State: Illinois
- Reporting Agency: (dropdown menu)
- Job Title: (empty)
- User Role: ICJO Admin
- User Type: Active User
- Supervision Type: (dropdown menu)
- Time Zone: Eastern Standard Time
- Last Password Rese...: 3/25/2021
- Locked: Not Locked
- Lock: (button)
- Reset Password: (button, highlighted with a red border)

On the left side of the form, there is a profile picture of the same woman as in the first image, with the same "Enlarge + Add x Remove" and "1 of 3" controls below it.

When the user clicks the Reset Password button, the Reset My Password page opens.

Home

Reset My Password

Reset My Password
| ^

Current Password

New Password

Confirm Password

Reset Password

? Help
| ^

In the Current Password field, enter the current password. In the New Password field, enter the new password. The new password must contain the following:

- Must be at least 8 characters long.
- Requires at least 2 numeric characters.
- Requires at least 2 characters that are upper case letters.
- Requires at least 2 characters that are lower case letters.
- Requires at least 2 characters that are symbols.

Note: If the password is missing a requirement, a red bar appears on the screen indicating which of the password requirements is missing from the new password.

Home

You must reset your password.
×

The password requires at least 2 numeric characters; this had 0.

The password requires at least 2 characters that are upper case letters; this had 1.

The password requires at least 2 characters that are symbols; this had 0.

×

Reset My Password

Reset My Password
| ^

Current Password

NovemberRo5!1\$

New Password

Testpassword

Confirm Password

Testpassword

Reset Password

? Help
| ^

Re-enter the new password in the Confirm Password field and click the **Reset Password** button. The user receives a confirmation message that the password reset is successful and the user returns to the My Profile page.

Task Grid Preferences

The Task Grid Preferences sub-section controls what columns the user sees in the Case Tasks Grid for Travel, Transfer, and Return cases.

The screenshot shows a window titled "Task Grid Preferences" with a dark header bar. Below the header, there are four checkboxes arranged horizontally, each with a label to its right:

- Show Assigned To
- Show Zone
- Show Completed By
- Show Completed Date

Note: It is recommended that ICJOs keep all options selected for their Task Grid. All columns are deselected by default for JPS or JPO users and can be changed manually here.

Communication

The Communication sub-section contains the user's email and phone numbers. Users can verify and update their contact details here.

The screenshot shows a window titled "Communication" with a dark header bar. The main content area contains several input fields and a button:

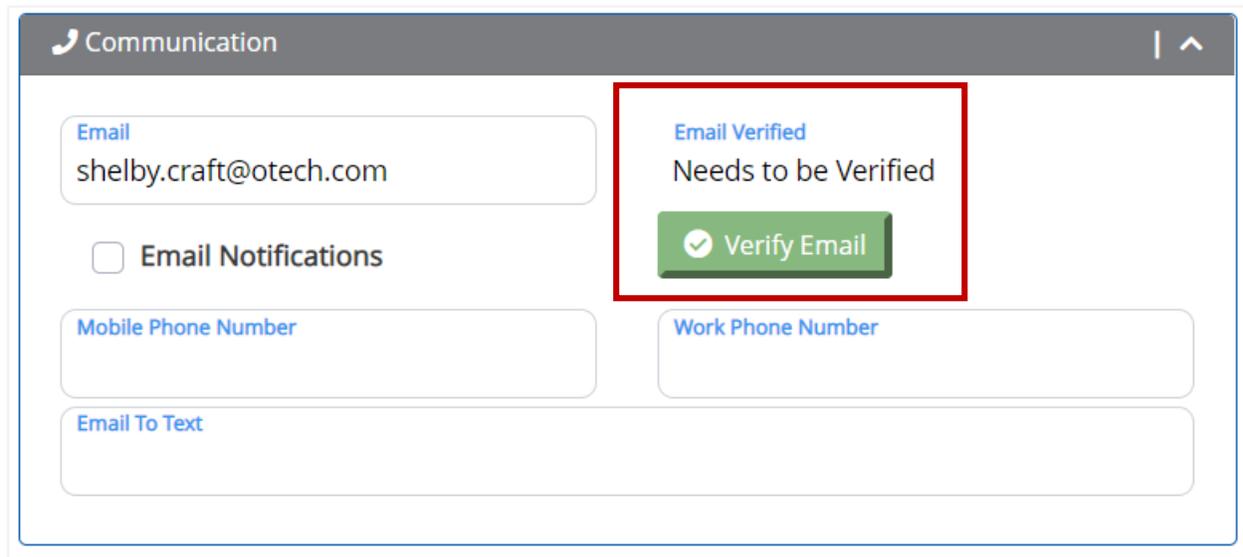
- An "Email" field containing the text "shelby.craft@otech.com".
- An "Email Verified" status indicator that says "Needs to be Verified".
- A green "Verify Email" button with a checkmark icon.
- An "Email Notifications" checkbox, which is currently unchecked.
- A "Mobile Phone Number" field.
- A "Work Phone Number" field.
- An "Email To Text" field.

UNITY sends email notifications based on the user's preferences set up on their profile page. To receive automated email alerts from UNITY, the **Email Notifications** field has to be selected and the user's email has to be successfully verified.

The user's contact phone numbers and Email to Text field in this section are only for reference purposes and will not be used by UNITY to send any notifications.

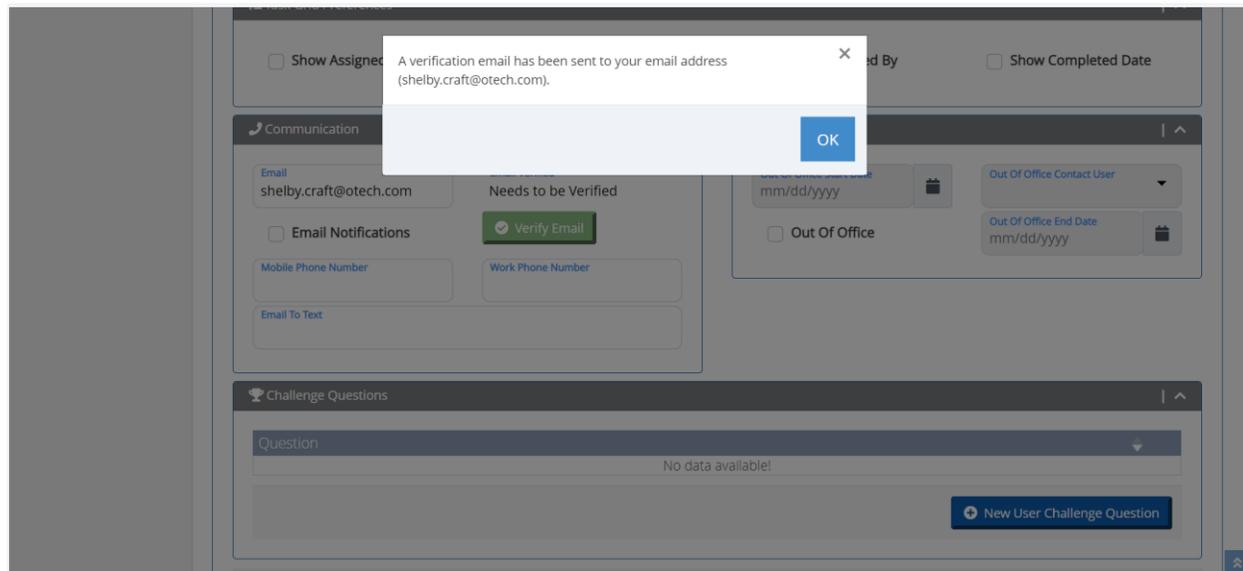
Verify Email

The user is required to verify the entered email address to be able to receive email notifications from UNITY.

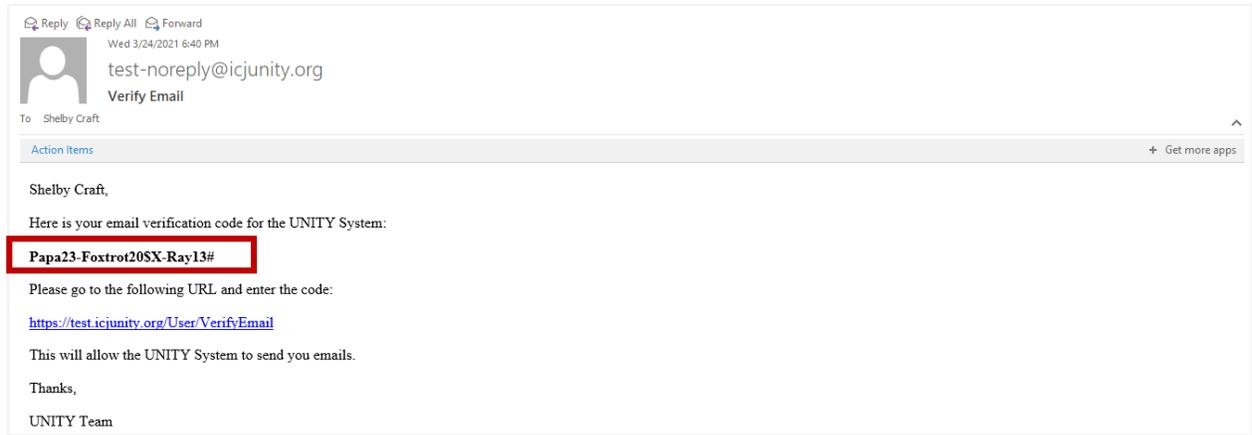


The screenshot shows a 'Communication' profile page. The 'Email' field contains 'shelby.craft@otech.com'. Below it is an unchecked 'Email Notifications' checkbox. To the right, a red box highlights a message that says 'Email Verified Needs to be Verified' with a green 'Verify Email' button. Below the email field are 'Mobile Phone Number' and 'Work Phone Number' fields. At the bottom is an 'Email To Text' field.

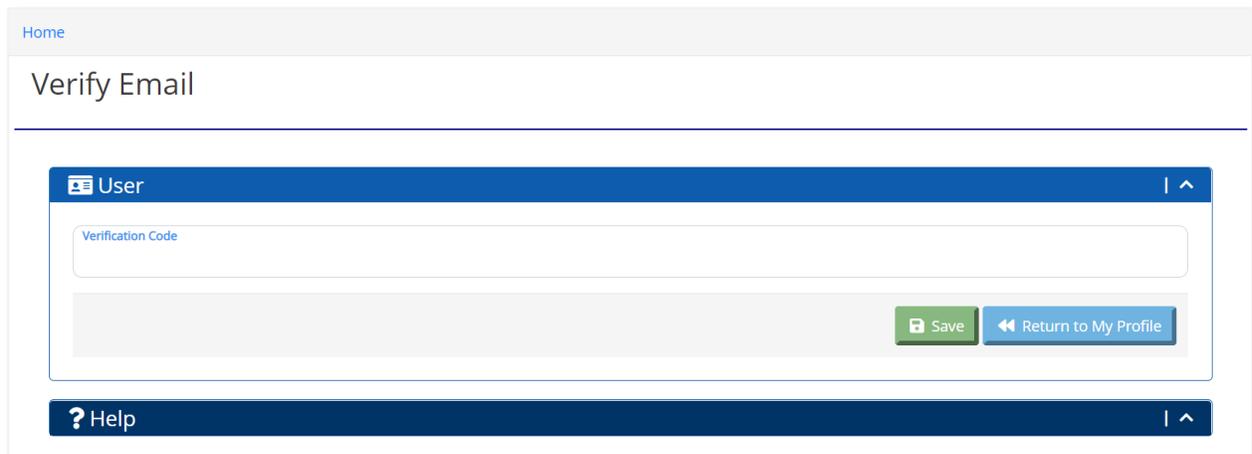
When the user clicks the **Verify Email** button, the user receives a message that a verification email was sent to the entered email address.



The user receives an email from UNITY that contains the email verification code.



When the user clicks the URL hyperlink in the email, the user returns to UNITY and the Verify Email page opens.



Note: If the user is not logged in at the time of verifying email, the login page is displayed. After logging in, click on the URL hyperlink in the email again to return to Verify Email page in UNITY.

Enter the Verification Code from the email and click the **Save** button.

Home

Verify Email

User

Verification Code
Papa23-Foxtrot20\$X-Ray13#

Save Return to My Profile

Help

To return to the My Profile page, click the **Return to My Profile** button.

Home

Verify Email

User

Verification Code
Papa23-Foxtrot20\$X-Ray13#

Save Return to My Profile

Help

Out of Office

UNITY has an Out of Office feature where users can set out of office start time, end time, and out-of-office contact user.

Out Of Office

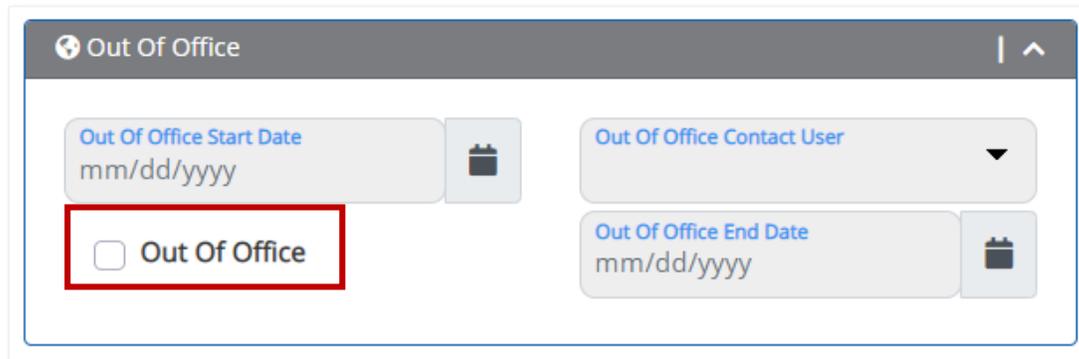
Out Of Office Start Date
mm/dd/yyyy

Out Of Office Contact User

Out Of Office End Date
mm/dd/yyyy

Out Of Office

After the user enters the date information and contact user fields, click the Out of Office checkbox.



The screenshot shows a window titled "Out Of Office". It contains four input fields: "Out Of Office Start Date" (mm/dd/yyyy) with a calendar icon, "Out Of Office Contact User" (a dropdown menu), "Out Of Office End Date" (mm/dd/yyyy) with a calendar icon, and an "Out Of Office" checkbox. The checkbox is highlighted with a red rectangular border.

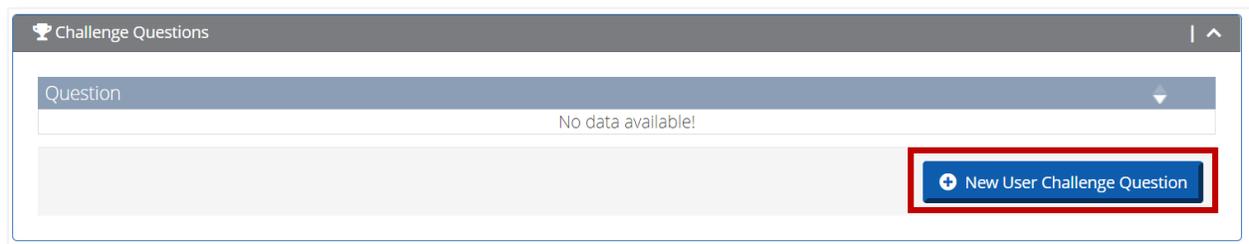
During the period the user is out of office, the user listed in the Out of Office Contact User field receives the user's case information. Notifications are also sent to the appropriate UNITY users in the user's zone structure.

Note: The Out of Office feature does not permanently reassign cases to the alternate contact. When the end date passes, the out of office automatically turns off.

Challenge Questions

The user must set up challenge questions to be able to reset their password from the Login page.

In the Challenge Questions sub-section, the user can click the **New User Challenge Question** button to set up a new challenge question.



The screenshot shows a window titled "Challenge Questions". It features a search bar labeled "Question" with a dropdown arrow and the text "No data available!". At the bottom right, there is a blue button with a plus icon and the text "New User Challenge Question", which is highlighted with a red rectangular border.

When the user clicks the **New User Challenge Question** button, the New User Challenge Question page opens.

Home

New User Challenge Question

Edit Challenge Question | ^

Question: What was your favorite place to visit as a child?

Answer:

[Return to User Profile](#)

? Help | ^

The user can select a question from the Question dropdown and provide an answer in the Answer field. The user can click the **Save User Challenge Question** to save the challenge question.

New User Challenge Question

Edit Challenge Question | ^

Question: What high school did you attend?

Answer: Elida

[Save User Challenge Question](#) [Save User Challenge Question And Add New](#) [Return to User Profile](#)

? Help | ^

To save the entered challenge question and enter a new question and answer, click the **Save User Challenge Question and Add New** button.

New User Challenge Question

👍 Edit Challenge Question
| ^

Question

What high school did you attend?

Answer

Elida

📁 Save User Challenge Question

➕ Save User Challenge Question And Add New

⬅️ Return to User Profile

? Help
| ^

To return to the My Profile page, click the **Return to User Profile** button.

New User Challenge Question

👍 Edit Challenge Question
| ^

Question

What high school did you attend?

Answer

Elida

📁 Save User Challenge Question

➕ Save User Challenge Question And Add New

⬅️ Return to User Profile

? Help
| ^

On the My Profile page, the Challenge Questions appear in the Challenge Questions section.

🏆 Challenge Questions
| ^

Question	
What high school did you attend?	➔ 🗑️
What is your mother's maiden name?	➔ 🗑️
What was your high school mascot?	➔ 🗑️

➕ New User Challenge Question

To view the Challenge Question, click the **View** icon. When the user clicks the View icon, the Edit User Challenge Question page opens.

Home

Edit User Challenge Question

Edit Challenge Question | ^

Question
What high school did you attend?

Answer
Elida

[Save User Challenge Question](#) [Return to User Profile](#)

Changes | ^

Help | ^

The user can edit the answer to the challenge question and click the **Save User Challenge Question** button to save the change.

Home

Edit User Challenge Question

Edit Challenge Question | ^

Question
What high school did you attend?

Answer
Elida

[Save User Challenge Question](#) [Return to User Profile](#)

Changes | ^

Help | ^

Click the **Return to User Profile** button to return to the My Profile page.

Home

Edit User Challenge Question

Edit Challenge Question

Question
What high school did you attend?

Answer
Elida

[Save User Challenge Question](#) [Return to User Profile](#)

Changes

Help

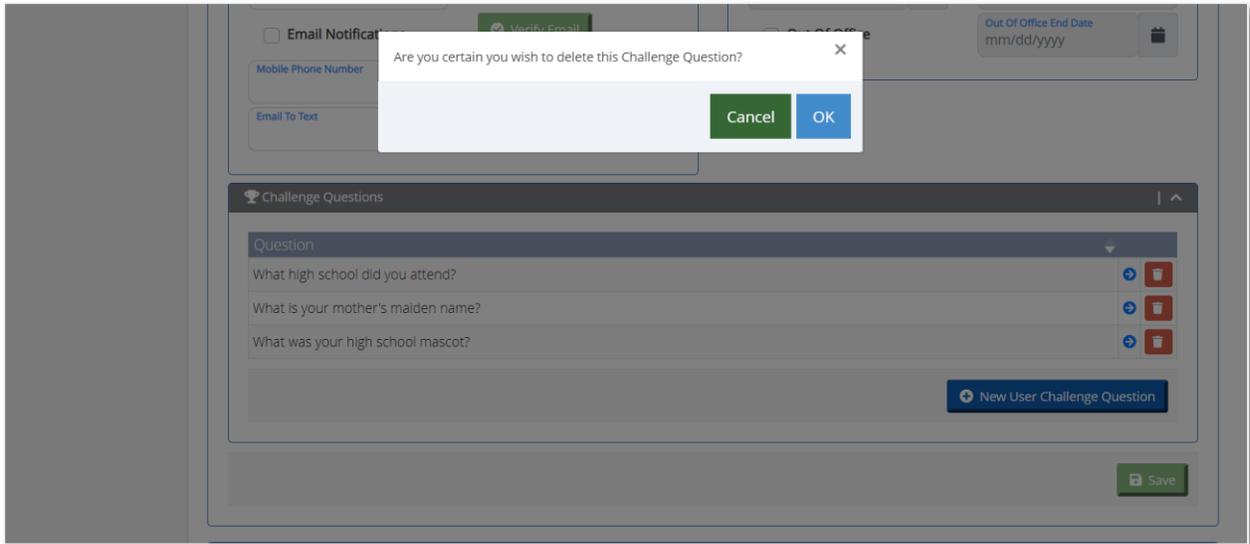
To delete a challenge question, click the **Delete** icon in the Challenge Question subsection.

Challenge Questions

Question	
What high school did you attend?	+ 
What is your mother's maiden name?	+ 
What was your high school mascot?	+ 

[+ New User Challenge Question](#)

When the user clicks the **Delete** icon, the user receives a message to confirm deleting the Challenge Question. To delete the Challenge Question, click the **Yes** button. To keep the Challenge Question and return to the My Profile page, click the **Cancel** button.

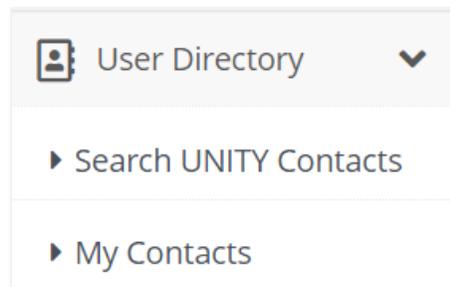


User Directory

Introduction: In this chapter, the User Directory module is discussed. In the User Directory submodule, JPO & JPS users can view contact information for all users within their state. A State ICJO user can view contact information for all users within their state as well as State ICJO contacts from other states.

User Directory Module

The user can access the User Directory module in the Menu Bar. The User Directory module has two submodules: Search UNITY Contacts and My Contacts.



Search UNITY Contacts

When the user selects the Search UNITY Contacts submodule, the Search UNITY Contacts page opens.

Home :: > Search UNITY Contacts

List User Contact

User Search Criteria

State: Illinois | Zone: [Dropdown] | Reporting Agency: [Dropdown] | County: [Dropdown]

First Name: [Text] | Last Name: [Text] | User Role: [Dropdown]

Work Phone: [Text] | Mobile Phone: [Text] | Email: [Text]

[To My Contacts] [Search]

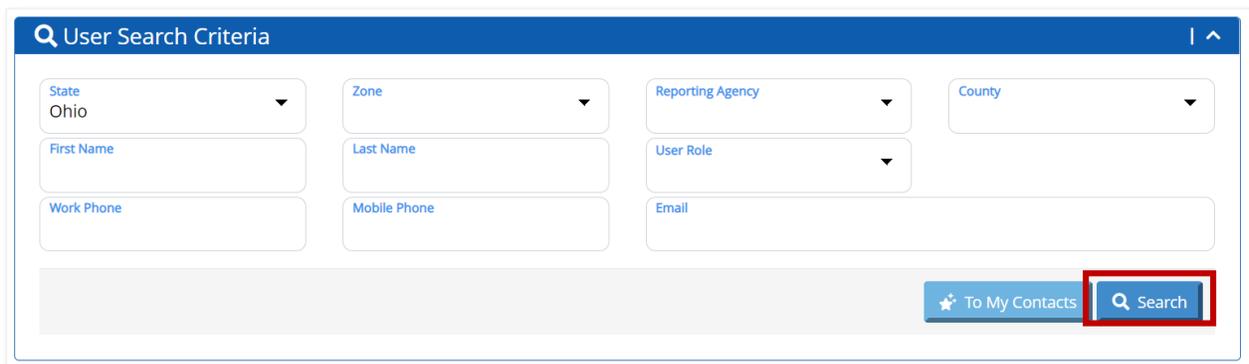
User Search Results

State	User	User Role	Zone	Email	Mobile Phone Number	Work Phone Number	
Illinois	Afolabi, Bobade JPS Woodford County	JPS	Woodford County			773-951-8665	[+][↻]
Illinois	Afolabi, bobade JPS Woodford County	JPS	Woodford County				[+][↻]
Illinois	Alejo, Adrian JPS 1 Aspen Drive	JPS	1 Aspen Drive	adrian.alejo@cookcountyil.gov			[+][↻]
Illinois	Alexander, Dennis JPS Woodford County	JPS	Woodford County				[+][↻]
Illinois	Alvarez, Cristina JPS Woodford County	JPS	Woodford County				[+][↻]
Illinois	Anderson, Paul JPS Woodford County	JPS	Woodford County	paul.anderson@doc.illinois.gov		312.446-8939	[+][↻]
Illinois	Anderson, John JPO Woodford County	JPO	Woodford County	john.anderson@cookcountyil.gov			[+][↻]
Illinois	Andrus, Kelley JPO 1 Aspen Drive	JPO	1 Aspen Drive	kjandrus@22ndcircuit.illinoiscourts.gov			[+][↻]
Illinois	Anne Schwartz, Mary JPS Woodford County	JPS	Woodford County	mschwartz@9thjudicial.org			[+][↻]
Illinois	Arenas, Francisco IPS 1 Aspen Drive	IPS	1 Aspen Drive				[+][↻]

The Search UNITY Contacts page has two sections: User Search Criteria and User Search Results.

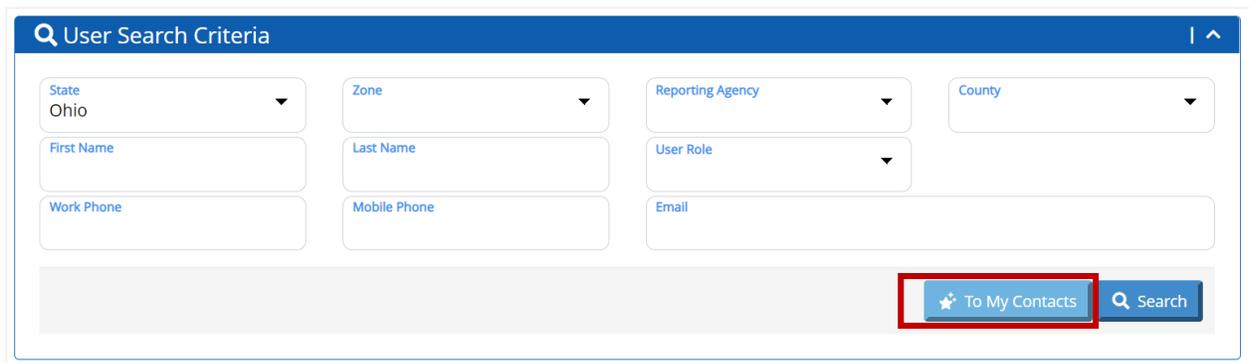
User Search Criteria

In the User Search Criteria section, enter the search criteria and click the **Search** button to search UNITY contacts.



The screenshot shows the 'User Search Criteria' form. It features several input fields: 'State' (dropdown menu with 'Ohio' selected), 'Zone' (dropdown menu), 'Reporting Agency' (dropdown menu), 'County' (dropdown menu), 'First Name', 'Last Name', 'User Role' (dropdown menu), 'Work Phone', 'Mobile Phone', and 'Email'. At the bottom right, there are two buttons: 'To My Contacts' (with a star icon) and 'Search' (with a magnifying glass icon). The 'Search' button is highlighted with a red rectangular box.

The user can click the **To My Contacts** button to go to the My Contacts section.



This screenshot is identical to the one above, showing the 'User Search Criteria' form. However, in this version, the 'To My Contacts' button (with a star icon) is highlighted with a red rectangular box, while the 'Search' button is not.

User Search Results

When the user enters search criteria in the User Search Criteria section and clicks the **Search** button, the search results display in the User Search Results section.

State	User	User Role	Zone	Email	Mobile Phone	Work Phone	
Ohio	Lawson, Nate ICJO Admin North - Unit One	ICJO Admin	North - Unit One	jjohnson@juvenilecompact.org	614-743-8178	614-547-0032	+ →

Go to page: 1 Row count: 10 Showing 1-1 of 1

To add the user to the My Contacts list, click the **plus sign** icon. This will allow each user to maintain a personalized list of contacts from the My Contacts list for quick and easy reference.

State	User	User Role	Zone	Email	Mobile Phone	Work Phone	
Ohio	Lawson, Nate ICJO Admin North - Unit One	ICJO Admin	North - Unit One	jjohnson@juvenilecompact.org	614-743-8178	614-547-0032	+ →

Go to page: 1 Row count: 10 Showing 1-1 of 1

The plus sign icon changes to a minus sign icon when the contact is added to the My Contacts list. Click the **minus sign** icon to remove the contact from the My Contacts list.

State	User	User Role	Zone	Email	Mobile Phone	Work Phone	
Ohio	Lawson, Nate ICJO Admin North - Unit One	ICJO Admin	North - Unit One	jjohnson@juvenilecompact.org	614-743-8178	614-547-0032	- →

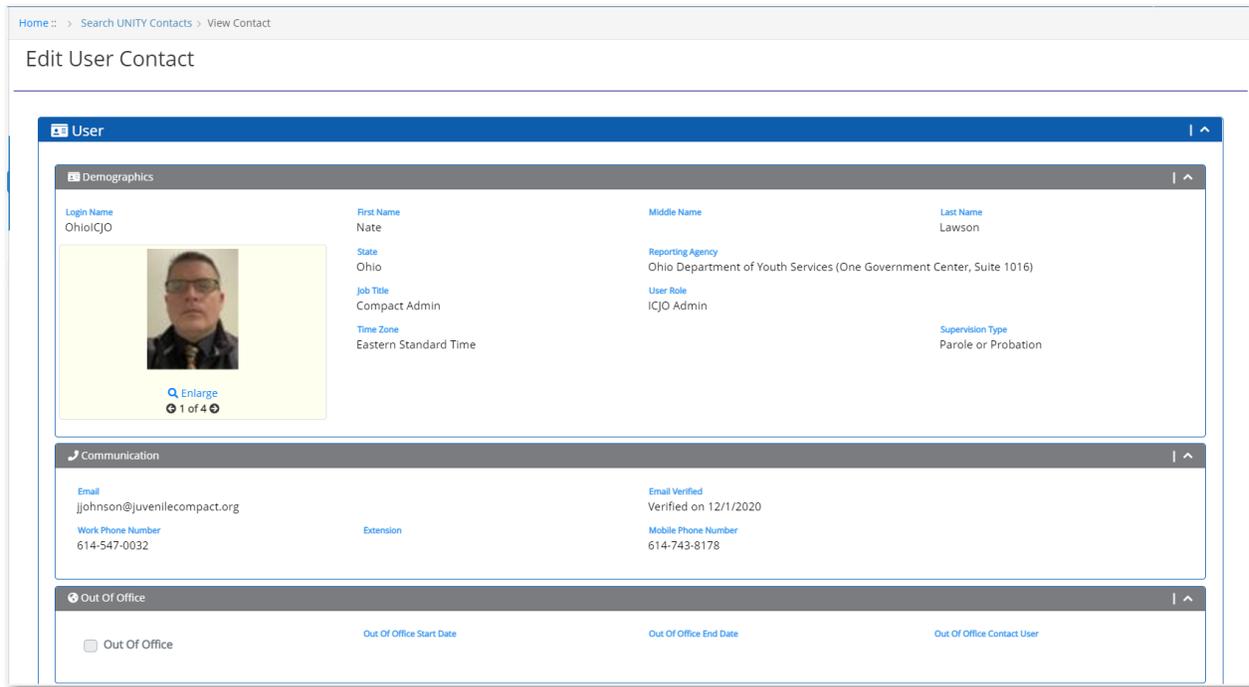
Go to page: 1 Row count: 10 Showing 1-1 of 1

To view the details for the contact, click the **View** icon.

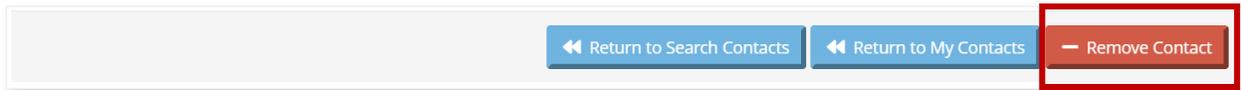
State	User	User Role	Zone	Email	Mobile Phone	Work Phone	
Ohio	Lawson, Nate ICJO Admin North - Unit One	ICJO Admin	North - Unit One	jjohnson@juvenilecompact.org	614-743-8178	614-547-0032	+ →

Go to page: 1 Row count: 10 Showing 1-1 of 1

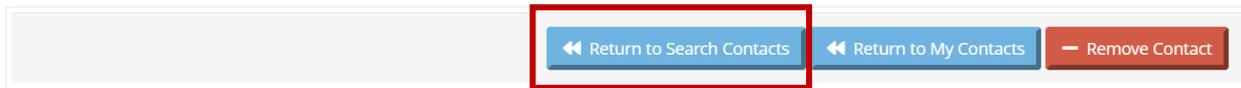
When the user clicks the **View** icon, the View Contact page opens. This displays the user's demographic information as well as communication and out-of-office details.



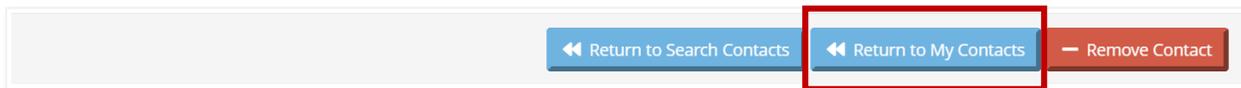
To remove the contact from the My Contacts list, click the **Remove Contact** button.



To return to the Search UNITY Contacts page, click the Return to Search Contacts.



To return to the My Contacts page, click the Return to My Contacts button.



My Contacts

When the user selects the My Contacts submodule from the Menu Bar, the My Contacts page opens. The My Contacts page is a personalized list of contacts maintained by each user and displays all contacts added by the user from the Search UNITY Contacts section.

If the user has contacts added to the My Contacts page, they can be accessed from here for quick and easy directory reference.

Home :: > My Contacts

My Contacts

State	User	Email	Mobile Phone Number	Work Phone Number		
Illinois	Afolabi, Bobade JPS Woodford County			773-951-8665	-	+
Illinois	afolabi, bobade JPS Woodford County				-	+
Illinois	Alejo, Adrian JPS 1 Aspen Drive	adrian.alejo@cookcountyil.gov			-	+
Illinois	Gross, Renae JPO	renae.gross@otech.com			-	+

<< < 1 > >> Go to page: 1 Row count: 10 Showing 1-4 of 4

[Return to Search Contacts](#)

[? Help](#)

If the user wants to remove any of the contacts from their My Contacts page, they can click the **minus** icon.

Home :: > My Contacts

My Contacts

State	User	Email	Mobile Phone Number	Work Phone Number	
Illinois	Afolabi, Bobade JPS Woodford County			773-951-8665	- +
Illinois	afolabi, bobade JPS Woodford County				- +
Illinois	Alejo, Adrian JPS 1 Aspen Drive	adrian.alejo@cookcountyil.gov			- +
Illinois	Gross, Renae JPO	renae.gross@otech.com			- +

Go to page: 1 Row count: 10 Showing 1-4 of 4

[Return to Search Contacts](#)

[? Help](#)

A shortcut to the My Contacts page is also available by clicking on the user name from the top right dropdown menu on the Header bar.

Interstate Commission for Juveniles
Serving Juveniles While Protecting Communities

Uniform Nationwide Interstate Tracking for Youth

Shelby Craft

- Profile
- Discover
- My Contacts
- Master Task List
- Logout

Home :: > My Contacts

My Contacts

My Contacts

Task Lists

Introduction: In this chapter, the Task Lists module is discussed. The Master Task List provides a quick overview of cases with pending required tasks that need action.

Master Task List

The Master Task List page shows a summary of all cases with pending required tasks that need action along with due dates. This list also has shortcuts to easily access case and juvenile detail pages.

The screenshot displays the 'Master Task List' interface. At the top, there is a breadcrumb 'Home > Master Task List'. Below the title, there is a 'Master Task List Filter Criteria' section with four dropdown menus: 'AllMyRole Tasks' (set to 'All Tasks'), 'Case Type' (set to 'All'), 'Sending/Receiving State' (set to 'All States'), and 'Days Remaining' (set to 'All').

Below the filters is the 'Case Tasks' section, which includes a 'Zone' filter set to 'Assigned To'. A table lists tasks for two cases. The first case is 'CIL210310-002-J5210309-01 Travel Permit - Illinois to Ohio - Jane Smith'. The second case is 'CIL210310-003-J5210309-01 Travel Permit - Illinois to Ohio - Jane Smith'. Each case has three tasks: 'Current Residence*', 'Travel Information*', and 'Court Case Information*'. All tasks are assigned to 'CompAd Jones' in the '1 Aspen Drive' zone and have a due date of '3/20' with a status of '4 days overdue'.

Task	Assigned to	Zone	Due Date
CIL210310-002-J5210309-01 Travel Permit - Illinois to Ohio - Jane Smith			
Current Residence*	CompAd Jones	1 Aspen Drive	Due 3/20, 4 days overdue
Travel Information*	CompAd Jones	1 Aspen Drive	Due 3/20, 4 days overdue
Court Case Information*	CompAd Jones	1 Aspen Drive	Due 3/20, 4 days overdue
CIL210310-003-J5210309-01 Travel Permit - Illinois to Ohio - Jane Smith			
Current Residence*	CompAd Jones	1 Aspen Drive	Due 3/20, 4 days overdue
Travel Information*	CompAd Jones	1 Aspen Drive	Due 3/20, 4 days overdue
Court Case Information*	CompAd Jones	1 Aspen Drive	Due 3/20, 4 days overdue

At the bottom of the interface is a 'Help' button.

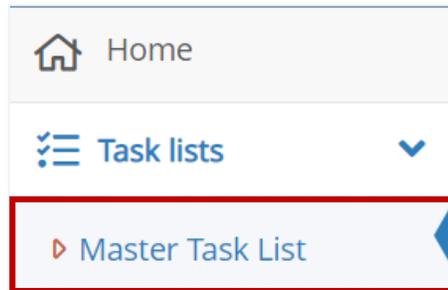
For a JPO or a JPS user, all case tasks displayed in the Master Task List will be from within the same zone as the logged-in user.

A zone is the unique structural mapping of a state's JPS and JPO management and juvenile supervision areas. A zone mapping can be based on Borough, County, District, Parish, or other regional area groups. Each JPO and JPS user in UNITY is assigned to a zone as per their state's zone structure.

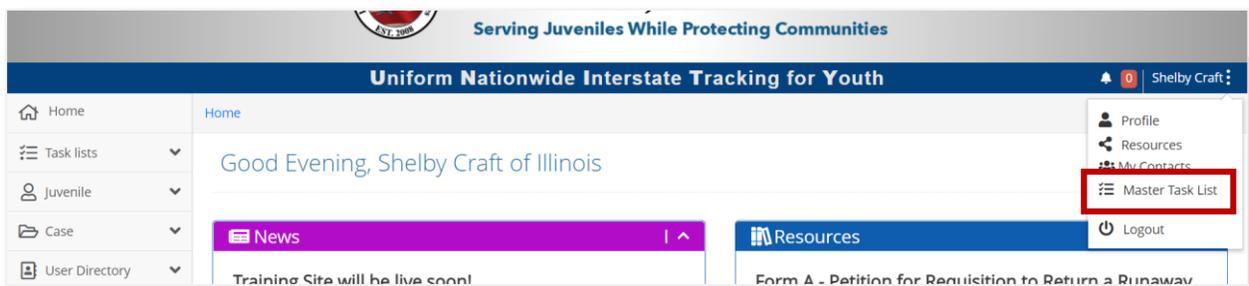
The Master Task List is focused only on cases with pending **required** tasks (displayed in salmon color) that must be completed and does not list any optional tasks to be completed. On viewing the case details page, additional tasks may be seen that include required as well as optional tasks to be completed.

The user can navigate to the Master Task List section from three locations in UNITY: Menu Bar, Header Bar, and the Dashboard.

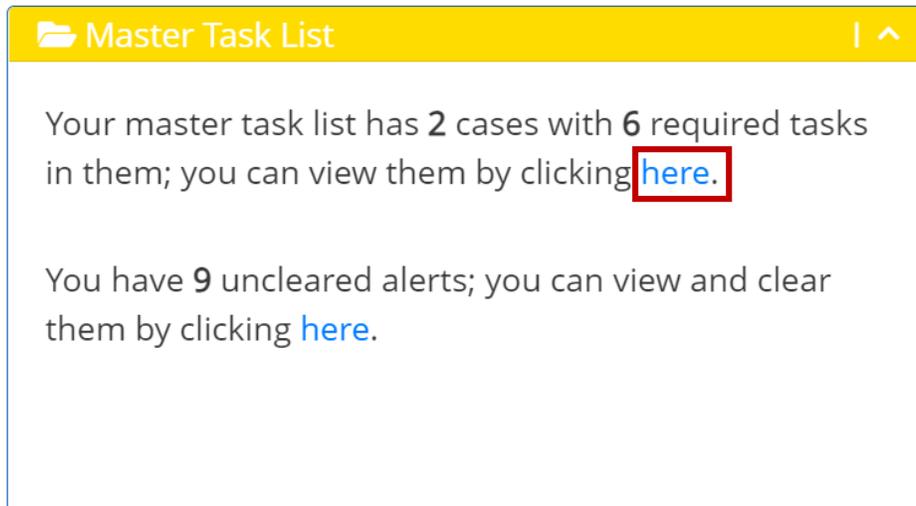
In the Menu Bar, the user can select the Master Task List submodule to go directly to the Master Task List page.



A shortcut to the Master Task List page is also available by clicking on the user name from the top right dropdown menu on the Header bar.



The user can also click on the hyperlink in the Master Task List section of the home page dashboard to go directly to the Master Task List page.

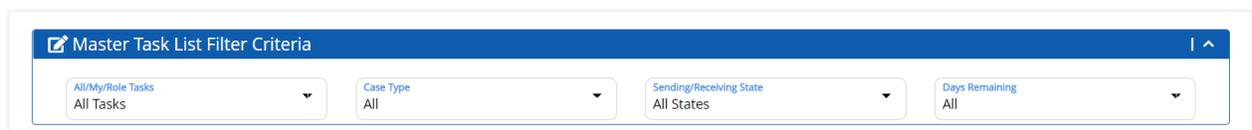


The Master Task List section on the home page dashboard shows a summary of the number of cases within the user's zone that have required tasks that are pending, along with the total number of required tasks in all those cases that need action.

Note: When the user clicks on the Master Task List hyperlink from the home page dashboard, the Master Task List page loads with the default filter criteria based on the user's role (JPO, JPS, or ICJO). The count displayed on the home page is based on all required tasks pending within the user's zone. For a JPO or a JPS user, this count may not match on the Master Task List with the default filter as "Tasks Assigned to Me", depending on how many unassigned tasks remain within the zone. The different filter criteria available in the Master Task List page is explained in the sections below

Master Task List Filter Criteria

In the Master Task List Filter Criteria section, the user can filter tasks based on role, case type, sending/receiving state, and days remaining.



If the user selects specific filter criteria in the Master Task List Filter Criteria section, the search results are refreshed in the Case Tasks section per the user's selection.

The section below describes the filter criteria available to customize the Master Task List grid view.

All/My/Role Tasks Dropdown Filter

The following options are available in the Tasks filter:

1. All Tasks

This filter shows all active cases that have required pending tasks including the tasks assigned to the logged-in user, or another user with the same role as the logged-in user, or a group assignment to a generic role same as the logged-in user. For a JPO or JPS user, all case tasks displayed in this list belong to the same zone as the logged-in user.

2. Tasks Assigned to Me

This filter shows active cases that have required pending tasks specifically assigned to the logged-in user with the user's name appearing in the Assigned To column. This is the default filter selection when a JPO or a JPS user views the Master Task List page.

3. Unassigned Tasks in My Role in My Zone

This filter shows active cases with required pending tasks that have not been assigned to a specific user in UNITY and are assigned to a generic role same as the logged-in user's role in the same zone.

For a JPS or a JPO user, the All/My/Role Tasks filter is defaulted to the "Tasks Assigned to Me" filter to provide a focused list of tasks that require the user's attention.

Case Type Filter

The following options are available in the Case Type filter:

1. All

This filter shows all active Travel, Transfer, or Return cases that have required pending tasks to be completed.

2. Travel

This filter shows all active Travel cases that have required pending tasks to be completed.

3. Transfer of Supervision

This filter shows all active Transfer cases that have required pending tasks to be completed.

4. Return

This filter shows all active Return cases that have required pending tasks to be completed.

Sending/Receiving State Filter

The following options are available in the Sending/Receiving State filter:

1. All States

This filter shows all active cases from/to all states that have required pending tasks to be completed.

2. State selection

This filter shows all active cases with the Sending or Receiving State matching the state selected in this dropdown, that have required pending tasks to be completed.

Days Remaining Filter

The following options are available in the Days Remaining filter:

1. All

This filter shows all active cases that have required pending tasks to be completed with any due date that falls in the past, current, or in the future.

2. Overdue

This filter shows all active cases that have required pending tasks to be completed with a due date that has already passed. These overdue tasks need the immediate attention of the logged-in user.

3. Due Today

This filter shows all active cases that have required pending tasks to be completed today.

4. Due Within 3 Days

This filter shows all active cases that have required pending tasks to be completed within the next 3 days.

5. Due Within a Week

This filter shows all active cases that have required pending tasks to be completed within the next 7 days or a week.

6. Due Within 30 Days

This filter shows all active cases that have required pending tasks to be completed within the next 30 days.

Case Tasks

In the Master Task List Case Tasks section, the case number, case type, sending state, receiving state, and the juvenile name are displayed along with all required case tasks that need action

The Case Tasks grid is grouped by cases and sorted by the due date in chronological order. Cases with tasks that have the longest overdue dates in the past are listed on top and cases with tasks that have the farthest due dates in the future are listed towards the end of the list.

The columns displayed in the Case Task grid include the pending task name, Assigned To User/Role, Zone assignment as well as Due Date. This view can be customized by clicking on the Assigned To and Zone checkbox selections that can be turned on or off to display the column detail in the Case Task grid. UNITY will remember these user selections and display the Case Task grid according to the user's preference during the next login.



To complete the assigned tasks, the user can click the **Case Number** hyperlink to go to the Case page.

Task	Assigned to	Zone	Due Date
CIL210310-002-JS210309-01 Travel Permit - Illinois - Parole to Ohio - Jane Smith			
Current Residence* JuvenileProfileSlashCurrentResidenceSlash 52255	CompAd Jones	1 Aspen Drive	Due 3/20, 4 days overdue
Travel Information* TravelPermitDataEntry 52257	CompAd Jones	1 Aspen Drive	Due 3/20, 4 days overdue
Court Case Information* CourtCaseTravel 52259	CompAd Jones	1 Aspen Drive	Due 3/20, 4 days overdue

The user can click the **Juvenile Name** hyperlink in the Case Tasks section to go to the Juvenile page.

Task	Assigned to	Zone	Due Date
 CIL210310-002-JS210309-01 Travel Permit - Illinois - Parole to Ohio	Jane Smith		
Travel Information* TravelPermitDataEntry 52257	CompAd Jones	1 Aspen Drive	Due 3/20, 4 days overdue
Court Case Information* CourtCaseTravel 52259	CompAd Jones	1 Aspen Drive	Due 3/20, 4 days overdue

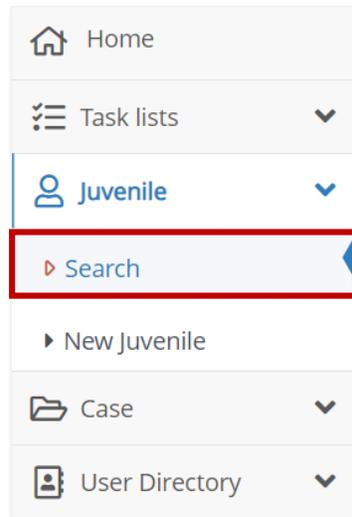
After the user completes the pending task, the task is removed from the Master Task List.

Juvenile

Introduction: In this chapter, the Juvenile module of the UNITY System is discussed. This chapter covers searching for a Juvenile who is already in the UNITY System as well as adding a new Juvenile to the UNITY System.

Juvenile Search

The Search submodule is located in the left Menu bar.



When the user clicks Search in the Menu Bar, the Search Juveniles page opens.

Search Juveniles

Q Juvenile Search Criteria
| ^

▼

▼

▼

+ New Juvenile
Q Search

📄 Juvenile Search Results
| ^

Last Name	First Name	Date Of Birth	Current Age	State	Race	Sex	Juvenile Number	
o	Aaerio	1/16/1958	63 years old	PA	Asian or Pacific Islander	Male	AC180809-01	➔
LLN	A'alla	5/31/2020	0 years old	WI	Black	Female	AG151026-01	➔
Thompson	Aaron	9/6/1994	26 years old	AL	Black	Male	AT130930-01	➔
Frenchee	smith	8/9/2001	19 years old	AL	White	Female	AF180515-02	➔
Frenche	A'dana	8/9/2000	20 years old	WI	Black	Female	AF180516-01	➔
Frenche	A'Dana	8/9/2000	20 years old	OH	Black	Female	AF180717-01	➔
Davis	A'drean	2/6/2001	20 years old	AL	Black	Male	AD161212-01	➔
Sargeant	A'ishah	10/7/2002	18 years old	CA	Black	Female	AS171002-01	➔
Johnson	A'jahn	1/27/2000	21 years old	LA	Black	Male	AJ160711-01	➔
Burrell-Sledge	A'Kiera	10/4/1999	21 years old	AL	Black	Female	AB140114-01	➔

⏪ < 1 2 ... 10364 10365 > ⏩
Go to page:
Row count:
Showing 1-10 of 103643

Juvenile Search Criteria

In the Juvenile Search Criteria section, the user can search for a current juvenile by last name, first name, date of birth, state, sex, or race. The user can enter values in one or more search criteria fields to search for the juvenile.

Q Juvenile Search Criteria
| ^

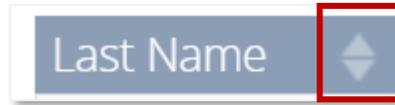
▼

▼

▼

+ New Juvenile
Q Search

The Juvenile Search Results section displays 10 results by default. The user can sort any column in the Juvenile Search Results section by clicking the double arrows.



When the user enters information in the Juvenile Search Criteria section, the search results are displayed in the Juvenile Search section.

Last Name	First Name	Date Of Birth	Current Age	State	Race	Sex	Juvenile Number	
SMITH	AARON	9/10/1993	27 years old	OH	Black	Male	AS121102-01	➔
Smith	Abigail	3/30/2000	20 years old	OR	White	Female	AS130401-01	🗑️ ➔
Goldsmith	Abraham	7/30/1999	21 years old	SC	White	Male	AG150803-03	➔
Goldsmith	Abraham	7/30/1999	21 years old	SC	White	Male	AG150803-02	🗑️ ➔
Smith	Andreous	12/9/1999	21 years old	KY	Black	Male	AS170605-01	🗑️ ➔
Smith	Adam	7/18/1996	24 years old	OH	White	Male	AS150723-01	🗑️ ➔
Smith	Adam	12/13/1995	25 years old	AR	White	Male	AS130919-01	🗑️ ➔
Smith	Adam	7/26/2001	19 years old	OH	White	Male	AS190329-01	🗑️ ➔
SMITH	ANDREW	8/22/1998	22 years old	NY	Black	Male	AS121114-01	🗑️ ➔
Smith	Andrew	1/31/1999	22 years old		Black	Male	AS180717-01	🗑️ ➔

Navigation: << 1 2 ... 128 129 >> Go to page: 1 Row count: 10 Showing 1-10 of 1287

The user can click the **View** icon to go to the Edit Juvenile page.

Last Name	First Name	Date Of Birth	Current Age	State	Race	Sex	Juvenile Number	
Craft	Carl	3/5/2005	16 years old	OH	Other, Specify - Biracial	Male	CC210324-0	➔

Navigation: << < 1 > >> Go to page: 1 Row count: 10 Showing 1-1 of 1

When the user clicks the **View** icon, the Edit Juvenile page opens.

The screenshot shows the 'Edit Juvenile' page with a 'Demographics' section. The form includes the following fields:

- First Name: Carl
- Middle Name: (empty)
- Last Name: Craft
- Name Suffix: (dropdown)
- Juvenile Number: CC210324-01
- Nickname: (empty)
- Date of Birth: 03/05/2005
- Current Age: 16 years old
- Sex: Male
- Gender Identity: (dropdown)
- Race: Other, Specify
- Specify (Race): Biracial
- Weight in Pounds: 0
- Feet: 0, Inches: 0
- Mobile Phone: (empty)
- Email: (empty)
- Hair Color: (dropdown)
- Marital Status: (dropdown)
- Ethnicity: (dropdown)
- Eye Color: (dropdown)

The user can review and edit the juvenile information from this page. Click the **Save Juvenile** button to save any changes made on the Edit Juvenile page.

The screenshot shows the 'Edit Juvenile' page with a sidebar containing the following navigation options:

- Demographics
- Scars, Marks and Tattoos
- Social Media
- Current Residence
- Current Legal Guardianship
- Juvenile Documents
- Cases

The 'Cases' section displays a table with the following data:

Case Number	Sending State	Receiving State	Case Type	Case Status	Date Opened	Date Closed
CL210324-001-CC210324-01	Illinois	Ohio	Travel	Active	3/24/2021	

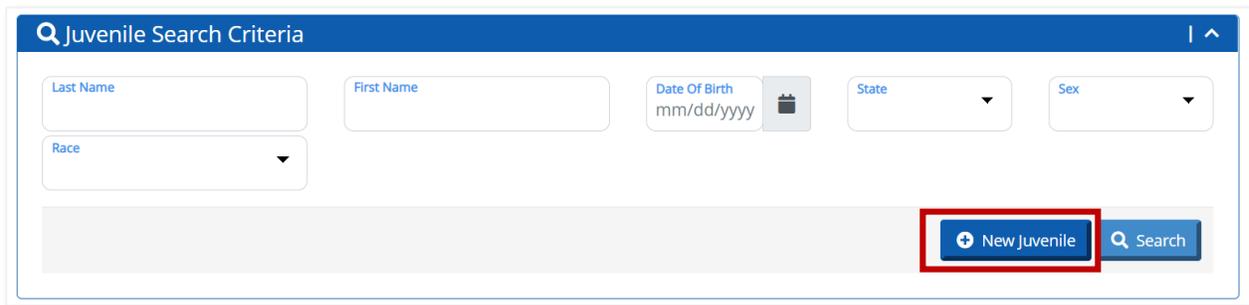
A 'New Case File' button is located below the table. The 'Save Juvenile' button at the bottom right is highlighted with a red box.

New Juvenile

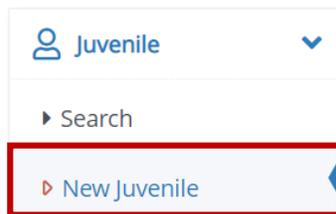
The user can create a new juvenile in two locations in UNITY: Search and New Juvenile.

Note: Before creating a new juvenile, the user should use the Search Juvenile page to ensure that the juvenile does not exist in UNITY to avoid duplicate entries of the same juvenile in the system.

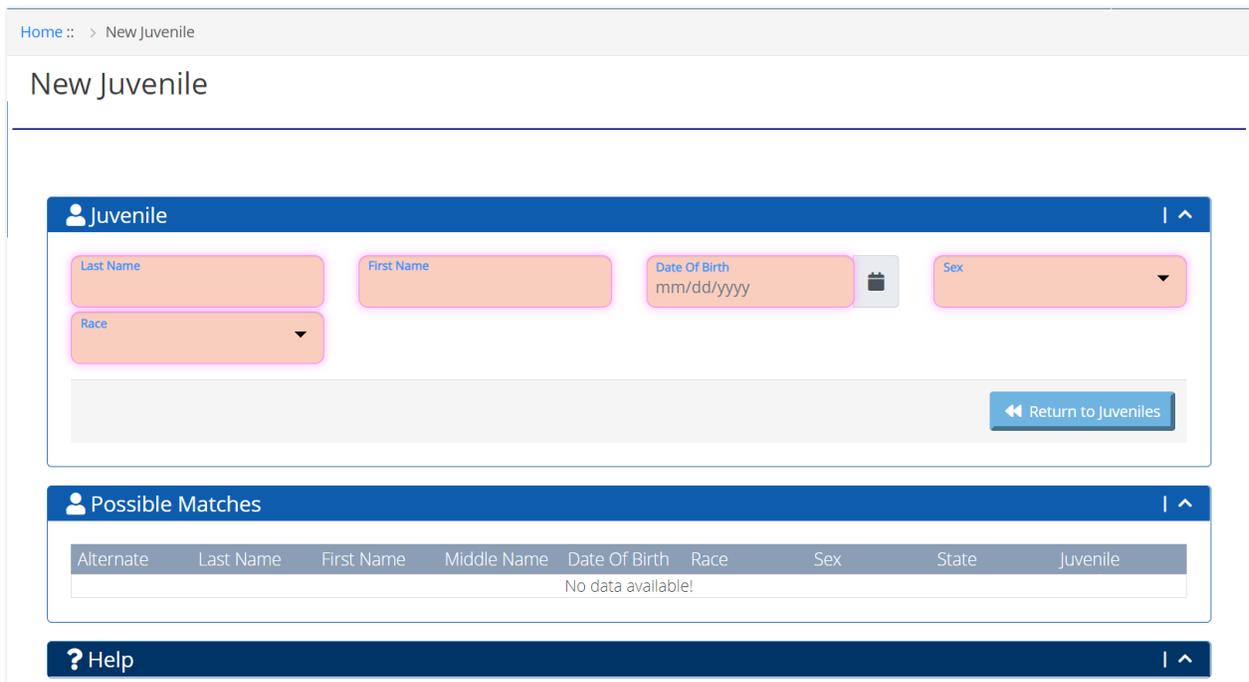
To create a new juvenile in the Search submodule, click the **New Juvenile** button.



The user can also create a new juvenile by selecting New Juvenile in the Menu Bar.



On the New Juvenile page, the user must enter data in the required fields indicated by salmon-colored fields



If there is a possible match, it will appear in the Possible Matches section on the New Juvenile page. The user can click the **View** icon to go to the View Juvenile page to check if this juvenile already exists in the UNITY system.

Juvenile

Last Name: Gross, First Name: Renae, Date Of Birth: 01/01/1995, Sex: Female, Race: White

Return to Juveniles | Create New Juvenile

Alternate	Last Name	First Name	Middle Name	Date Of Birth	Race	Sex	State	Juvenile
Exact Match	Gross	Renae		1/1/1995	White	Female		RG210305-01

If the user has confirmed that there are no matches and the new juvenile does not exist in the UNITY system, the user can click the **Create New Juvenile** button to proceed.

Juvenile

Last Name: Gross, First Name: Renae, Date Of Birth: 01/01/1995, Sex: Female, Race: White

Return to Juveniles | Create New Juvenile

Alternate	Last Name	First Name	Middle Name	Date Of Birth	Race	Sex	State	Juvenile
No data available!								

The user will see a confirmation message that the new user is created.

Edit Juvenile

After the user clicks the **Create New Juvenile** button, the Edit Juvenile page opens.

On the Edit Juvenile page, the user can complete the following sections:

- Demographics
- Scars, Marks, and Tattoos
- Social Media
- Current Resident
- Current Legal Guardianship
- Cases

Each one of the sections is explained below.

The user must minimally complete the required fields in the Demographics section for all cases. Depending on the case type, the Case page will prompt the user to complete additional required fields in the other Juvenile sections as part of the case steps.

After entering data on the Edit Juvenile page, the user should click the **Save Juvenile** button to save all entered data. The user will see the blue Saving bar then the green Saved bar after the data is saved.

The screenshot shows the 'Juvenile' system interface. At the top, there are several menu items: Demographics, Scars, Marks and Tattoos, Social Media, Current Residence, Current Legal Guardianship, Juvenile Documents, and Cases. The 'Cases' section is expanded, showing a table with the following data:

Case Number	Sending State	Receiving State	Case Type	Case Status	Date Opened	Date Closed
CIL210324-001-CC210324-01	Illinois	Ohio	Travel	Active	3/24/2021	

Below the table is a 'New Case File' button. At the bottom right of the interface, a 'Save Juvenile' button is highlighted with a red box.

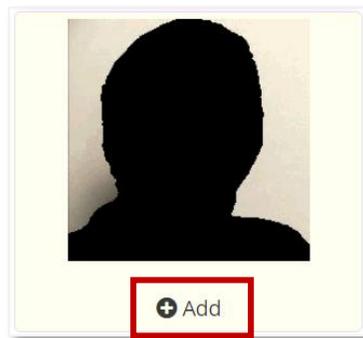
Demographics

In the Demographics section, the First Name, Last Name, Date of Birth, Sex, and Race are auto-filled with the data entered on the New Juvenile page. The user can enter additional data in demographics fields or edit auto-filled data in the required fields.

The screenshot shows the 'Demographics' section of the Juvenile system interface. The fields are organized as follows:

- First Name:** Renae
- Middle Name:** (empty)
- Last Name:** Gross
- Name Suffix:** (dropdown menu)
- Juvenile Number:** RG210305-01
- Nickname:** (empty)
- Date Of Birth:** 01/01/1995
- Current Age:** 26 years old
- Sex:** Female
- Gender Identity:** (dropdown menu)
- Race:** White
- Gang Affiliation:** (dropdown menu)
- Primary Language:** (dropdown menu)
- Weight in Pounds:** 0
- Feet:** 0
- Inches:** 0
- Marital Status:** (dropdown menu)
- Hair Color:** (dropdown menu)
- Mobile Phone:** (empty)
- Gender Identity:** (dropdown menu)
- Ethnicity:** (dropdown menu)
- Eye Color:** (dropdown menu)
- Email:** (empty)
- Juvenile Additional Information:** (text area)

The user can add a photo on the Edit Juvenile page. To add a photo, click the Add icon in the Demographics sub-section.



When the user clicks the **Add** icon, the Upload Photo page opens. The user can choose a saved photo and click the **Save Photo** button.



When the user clicks the **Save Photo** button, the user receives a confirmation message that the photo is saved and the user returns to the My Profile page. The uploaded photo displays in the demographic section.

The screenshot shows a 'Demographics' form with the following fields and values:

- First Name:** Carl
- Middle Name:** (empty)
- Last Name:** Craft
- Name Suffix:** (dropdown menu)
- Juvenile Number:** CC210324-01
- Date Of Birth:** 03/05/2005
- Nickname:** (empty)
- Gang Affiliation:** (dropdown menu)
- Current Age:** 16 years old
- Primary Language:** (dropdown menu)
- Sex:** Male
- Gender Identity:** (dropdown menu)
- Marital Status:** (dropdown menu)
- Race:** Other, Specify
- Specify (Race):** Biracial
- Ethnicity:** (dropdown menu)
- Weight In Pounds:** 0
- Feet:** 0
- Inches:** 0
- Eye Color:** (dropdown menu)
- Hair Color:** (dropdown menu)
- Mobile Phone:** (empty)
- Email:** (empty)
- Juvenile Additional Information:** (empty text area)

The user can add more photos to the Demographics section by clicking the **Add** icon.

Scars, Marks, and Tattoos

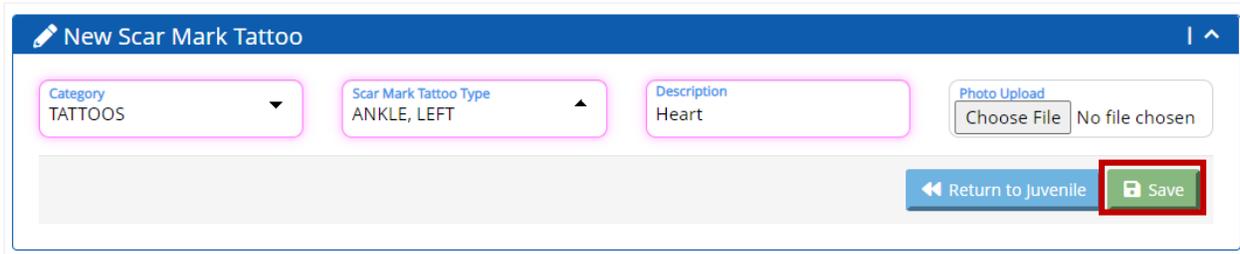
In the Scars, Marks, and Tattoos section, the user can click the **New Scar Mark Tattoo** button to add information.

The screenshot shows the 'Scars, Marks and Tattoos' section with a table and a button:

Scar Mark Tattoo	Description
No data available!	

Below the table is a button labeled **New Scar Mark Tattoo** with a plus icon, highlighted with a red box.

On the New Juvenile Scar Mark Tattoo page, enter data in the required fields and click the **Save** button.



The user will see a confirmation message that the information is saved.

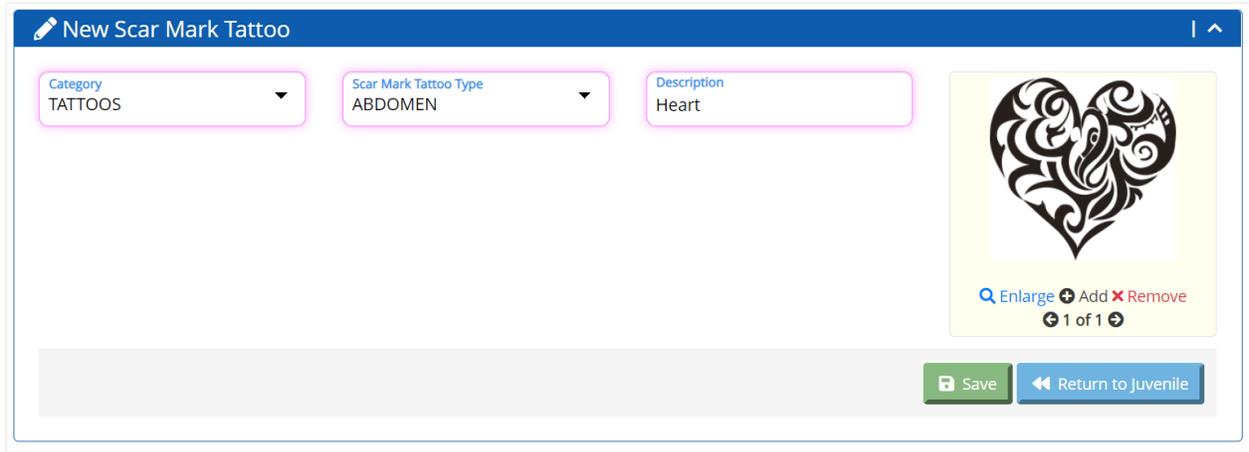
The user can enter a picture of the scar, mark, or tattoo on the Edit Juvenile Scar Mark Tattoo page. To add a picture, click the **Add** icon.



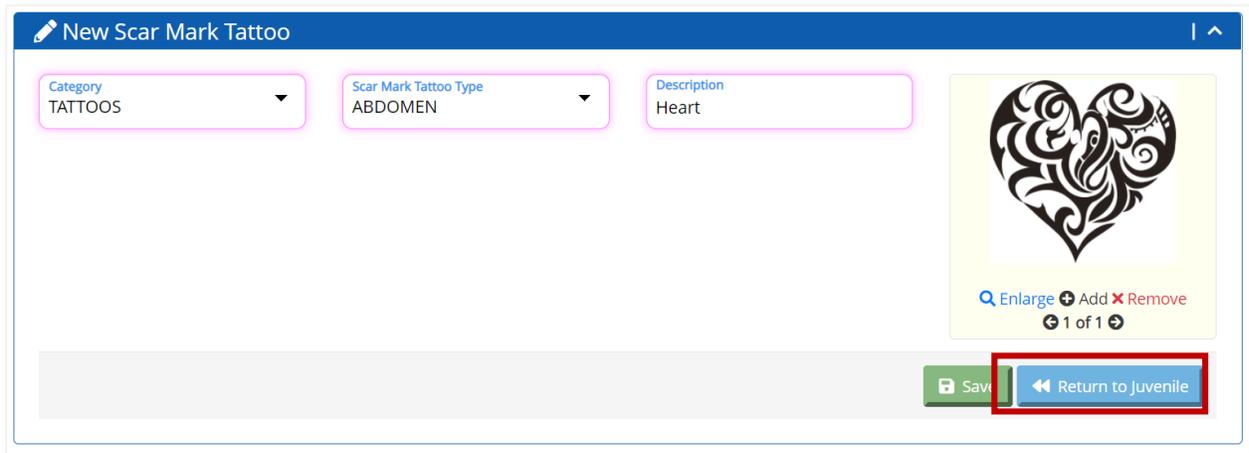
When the user clicks the Add icon, the Upload Photo page opens. The user can choose a saved photo and click the **Save Photo** button.



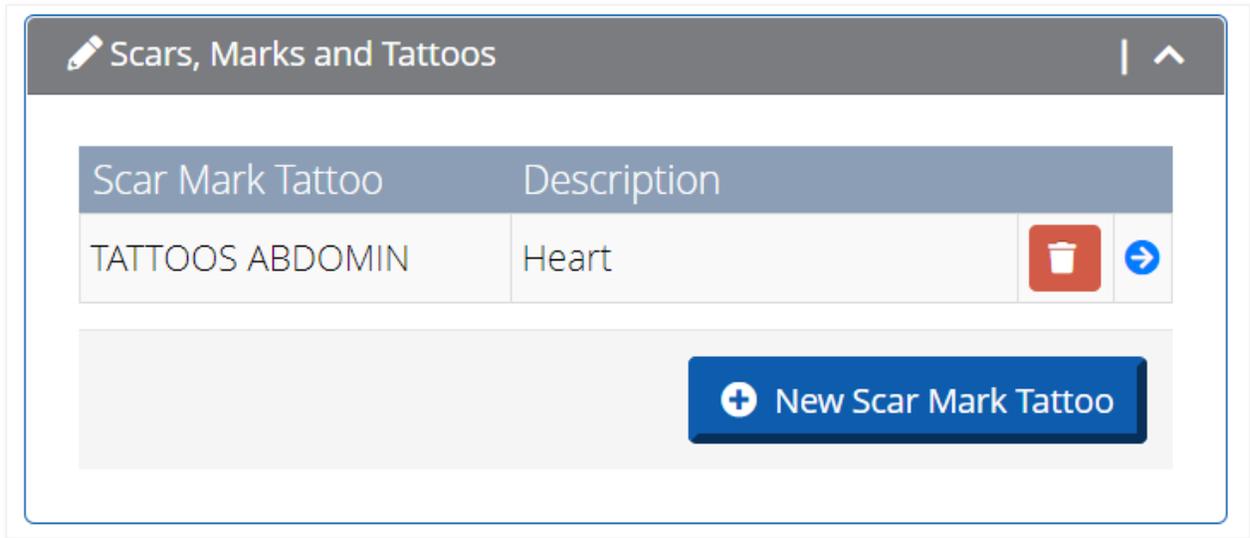
When the user clicks the **Save Photo** button, the user receives a confirmation message that the photo is saved and the user returns to the Edit Juvenile Scar Mark Tattoo page. The uploaded photo displays in the New Scar Mark Tattoo section.



Click the **Return to Juvenile** button to return to the Edit Juvenile page.

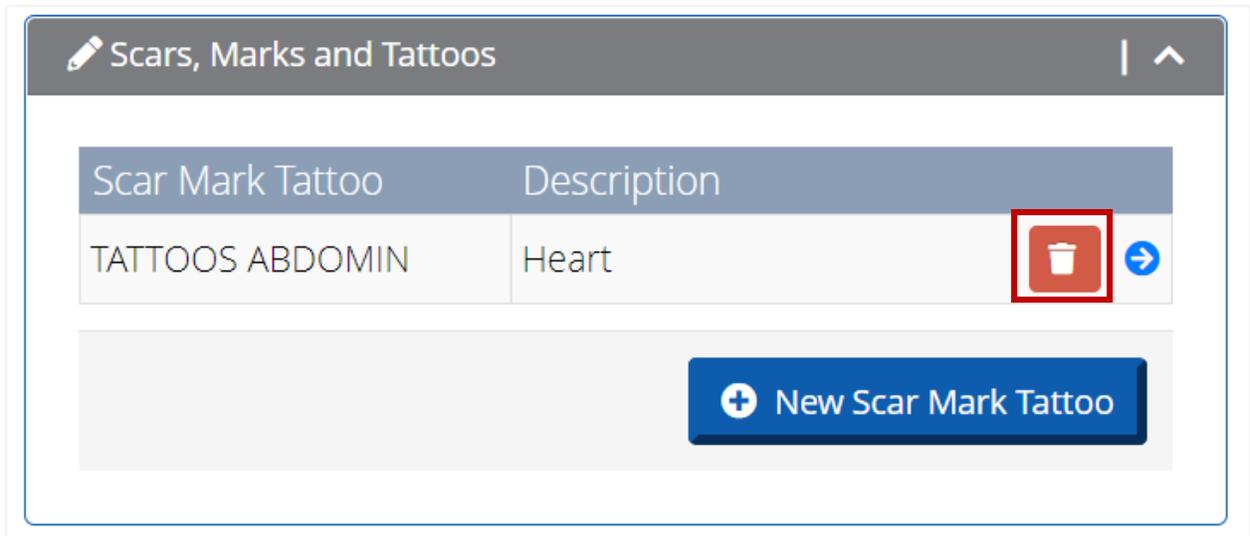


The scar, mark, or tattoo displays in the New Scar Mark Tattoo section.

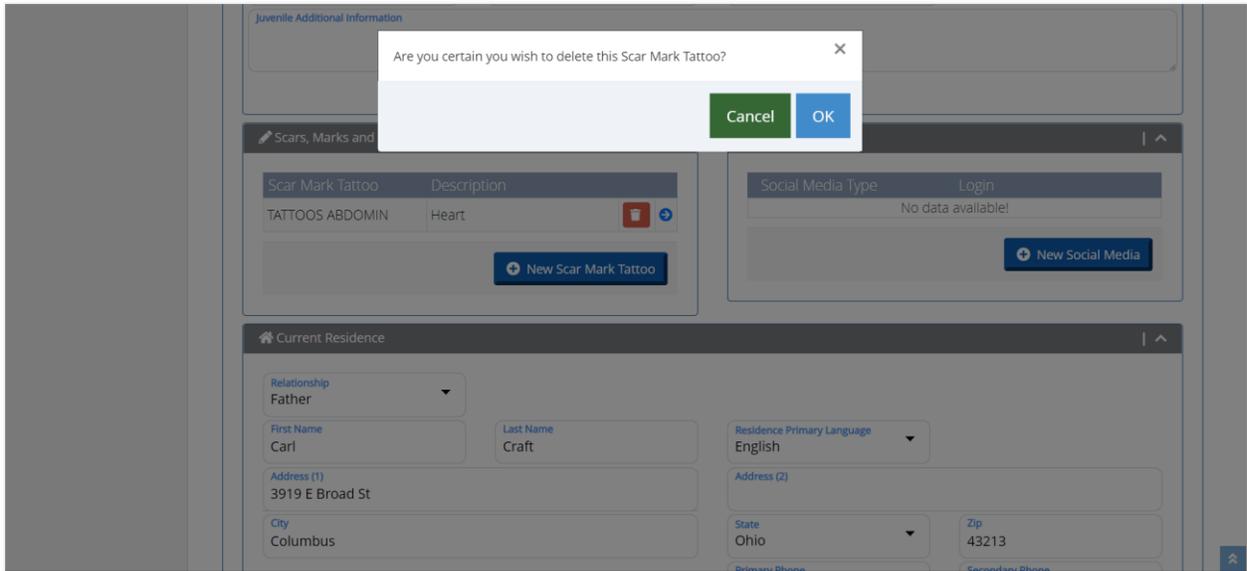


The user can add more scars, marks, and tattoos by clicking the **New Scar Mark Tattoo** button.

To delete a scar, mark, or tattoo, click the **Delete** icon.



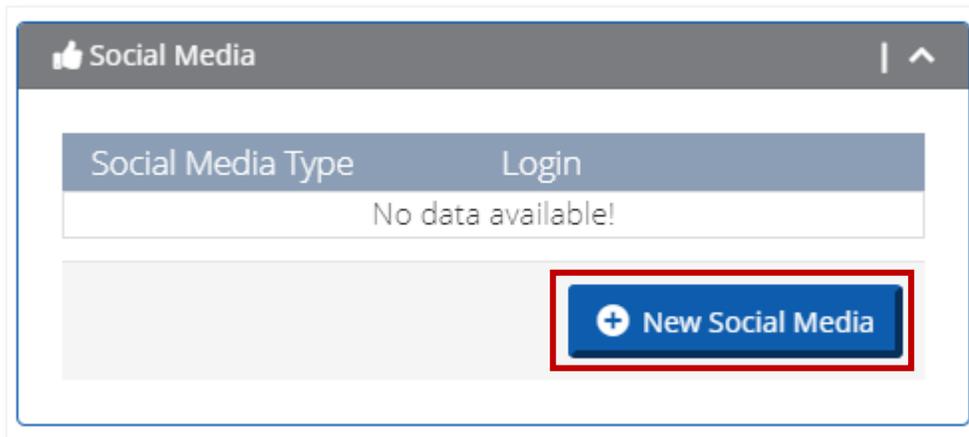
When the user clicks the **Delete** icon, the user receives a message to confirm deleting the scar, mark, or tattoo.



To delete the scar, mark, or tattoo, click the **Yes** button. To keep the scar, mark, or tattoo and return to the Edit Juvenile page, click the **Cancel** button.

Social Media

In the Social Media section, the user can click the **New Social Media** button to add information.



When the user clicks the **New Social Media** button, the New Juvenile Social Media page opens.

The screenshot shows a web form titled "New Social Media" with a blue header. The form contains a dropdown menu for "Social Media Type" with "Facebook" selected, a "Login" text input field, a "Password" text input field, and a "URL" text input field. At the bottom right, there are two buttons: a green "Save" button and a blue "Return to Juvenile" button. A pink rectangular highlight is drawn around the "Social Media Type" dropdown menu.

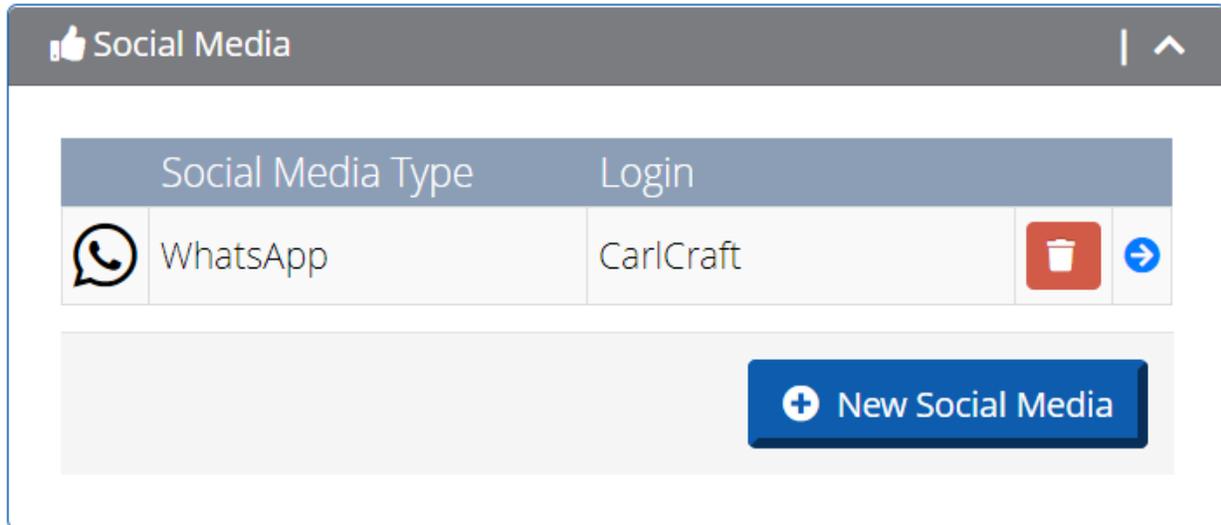
On the New Juvenile Social Media page, enter data in the required fields and click the **Save** button.

This screenshot is identical to the previous one, but the "Save" button is highlighted with a red rectangular border. The "Social Media Type" dropdown menu is still highlighted in pink.

Click the **Return to Juvenile** button to return to the Edit Juvenile page.

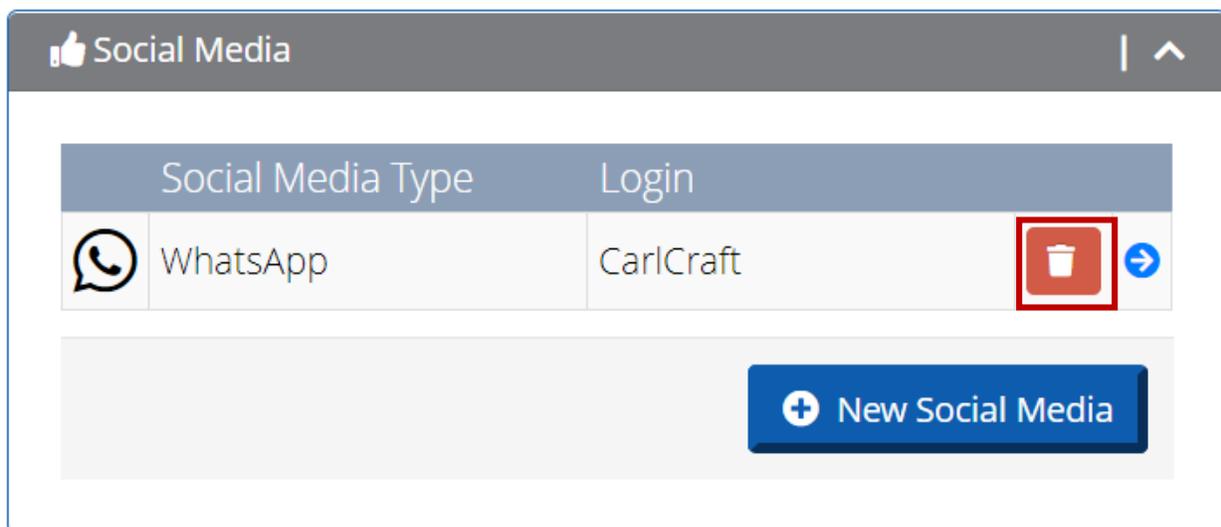
This screenshot is identical to the previous ones, but the "Return to Juvenile" button is highlighted with a red rectangular border. The "Social Media Type" dropdown menu is still highlighted in pink.

The social media details display in the Social Media section.

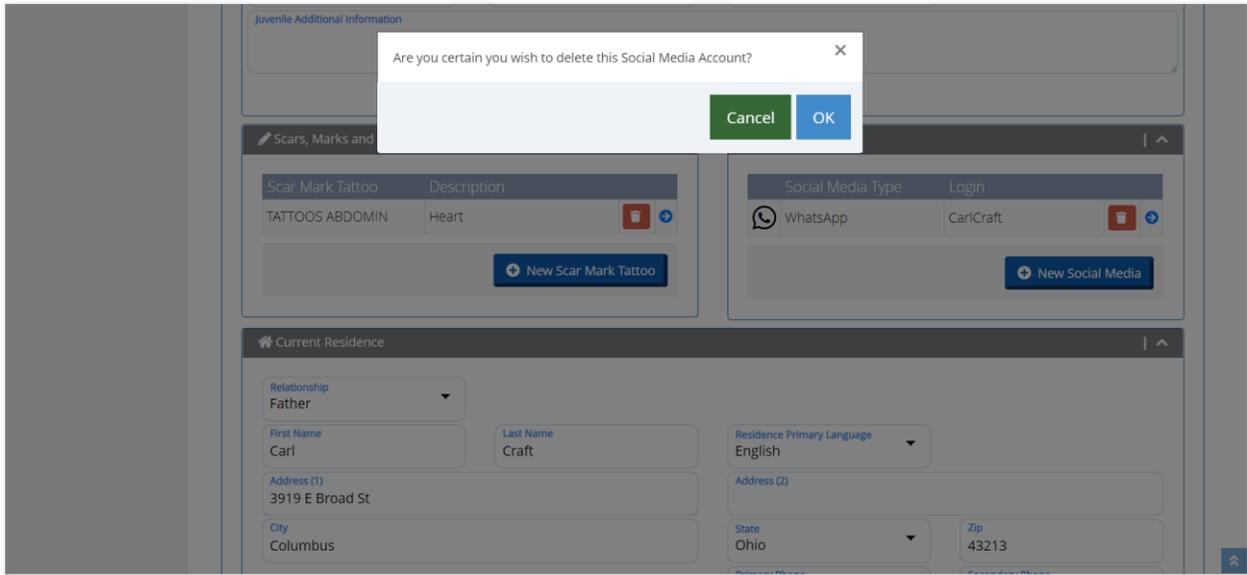


The user can add more social by clicking the **New Social Media** button.

To delete a social media entry, click the **Delete** icon.



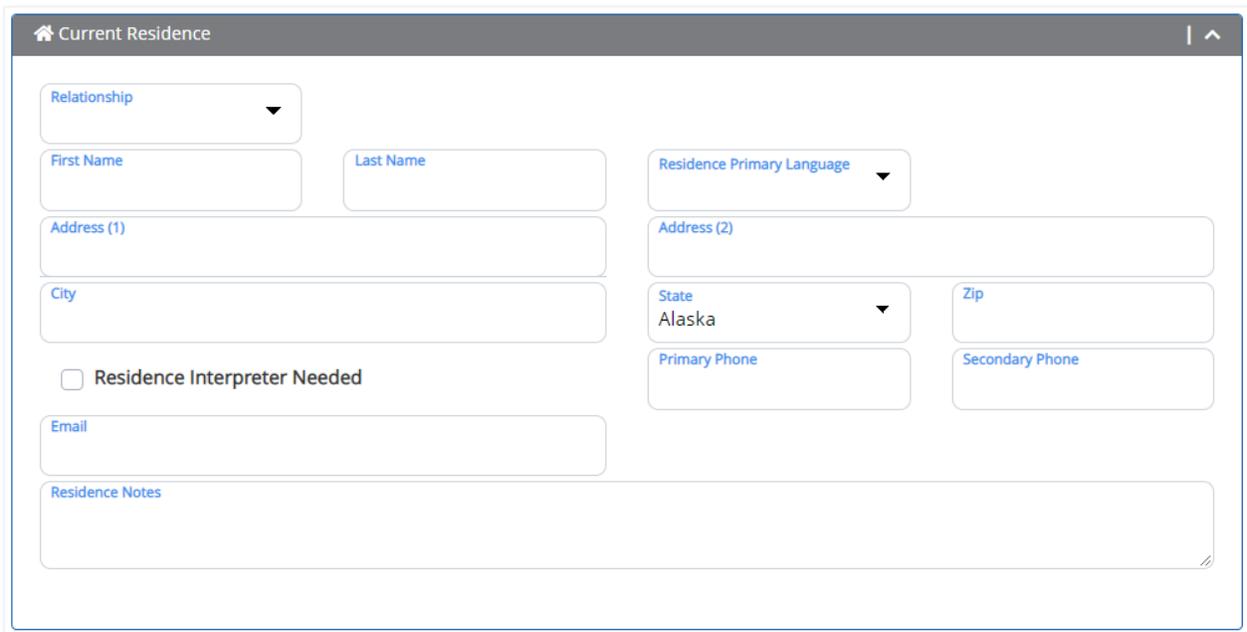
When the user clicks the **Delete** icon, the user receives a message to confirm deleting the social media entry.



To delete the social media entry, click the **Yes** button. To keep the social media entry and return to the Edit Juvenile page, click the **Cancel** button.

Current Residence

In the Current Residence section, the user can enter residence details such as Relationship, Address, Phone Number, and Email.

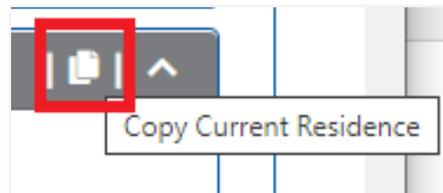


Note: If the user selects Residential Treatment Facility, Group Home, or Foster Home, an additional Facility Name field appears.

Current Legal Guardianship

In the Current Legal Guardianship section, the user can enter the guardianship details such as First Name, Last Name, Address, and Email.

If the current legal guardian is the same individual with the same address as entered in the Current Residence section, the user can click the **Copy Current Residence** icon to copy the information from the Current Residence section to the Current Legal Guardianship section.



Note: If there is more than one legal guardian, the user should include the additional guardian's name and contact information in the Legal Guardian Notes Section.

Note: If the user selects Custodial Agency in the Legal Guardianship field, the Custodial Agency Name appears.

Cases

In the Cases section, the user can enter a new case file or view current case information.

For a new juvenile, the Case section is blank.

For an existing juvenile, the Case section displays all current and past cases in UNITY. While all users have visibility over the number of cases a juvenile may have in UNITY, not all users

can view the case details page. To view the case details, the user must belong to either the Sending or Receiving States associated with the case file. All other users can view minimal information regarding the case such as the Case Number, Case Type, Sending / Receiving state, and Date Opened / Closed from the Cases section.

Note: States that are not a party to the case cannot view the case details.

To create a new case, click the **New Case File** button. When the user clicks the **New Case File** button, the New Case File page opens. The user then follows the steps to create a new case for this juvenile.

Home

New Case File

What type of process do you wish to initiate?

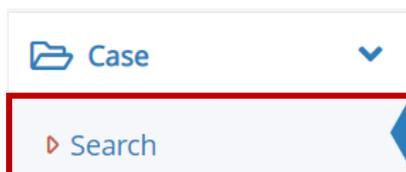
? Help | ^

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Case

Introduction: In this chapter, the Case module is discussed. In the Case module, the user can search for all cases in UNITY.

The user can access the Case module from the Menu Bar. To search for juvenile cases, select the Search submodule.



Case Search

When the user selects the Search submodule in the Menu Bar, the Search page opens.

Home :: > Search

Case Search

🔍 Case Search Criteria
| ^

Case Status

Case Type

Sending State

Receiving State

Case Number

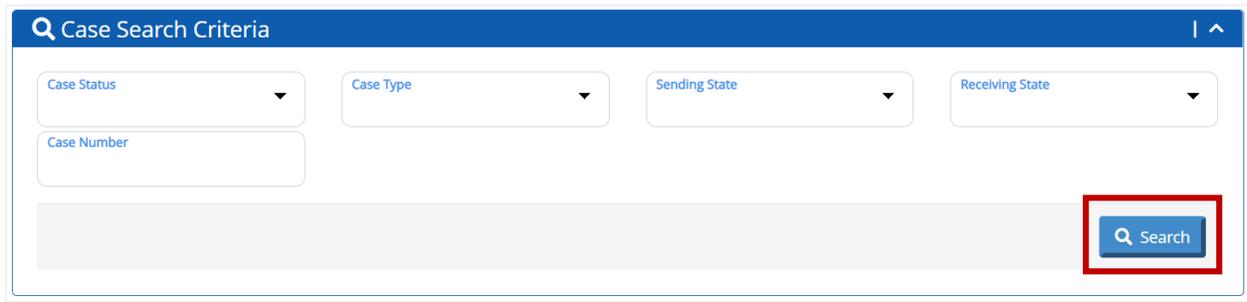
📄 Case Search Results
| ^

Last Name	First Name	Sending State	Receiving	Case Type	Case Status	Date Opened	Date Closed	Case Number
Kumar	Sathivel	Alaska	Alabama	Return	Active	3/24/2021		CAK210324-001-SK210317-01 ➔
charan	ramcharan	Wisconsin	Alabama	Transfer of Supervision	Active	3/24/2021		CW1210324-001-rc201012-03 ➔
Kumar	Sathivel	Alaska	Alabama	Return	Active	3/24/2021		CAK210324-002-SK210317-01 ➔

The Search page has two sections: Case Search Criteria and Case Search Results.

Case Search Criteria

In the Case Search Criteria section, the user can enter the Case Status, Case Type, Sending State, Receiving State, and/or Case Number and click the **Search** button.



The image shows a 'Case Search Criteria' form with several input fields: 'Case Status', 'Case Type', 'Sending State', 'Receiving State', and 'Case Number'. A red box highlights the 'Search' button at the bottom right of the form.

The search results display in the Case Search Results section.



The image shows a 'Case Search Results' table with the following columns: Last Name, First Name, Sending State, Receiving State, Case Type, Case Status, Date Opened, Date Closed, and Case Number. The table contains 10 rows of data. At the bottom, there is a pagination bar showing 'Go to page: 1' and 'Row count: 10', with a total of 2163 results.

Last Name	First Name	Sending State	Receiving State	Case Type	Case Status	Date Opened	Date Closed	Case Number
Kumar	Sathivel	Alaska	Alabama	Return	Active	3/24/2021		CAK210324-001-SK210317-01
charan	ramcharan	Wisconsin	Alabama	Transfer of Supervision	Active	3/24/2021		CWI210324-001-rc201012-03
Kumar	Sathivel	Alaska	Alabama	Return	Active	3/24/2021		CAK210324-002-SK210317-01
charan	ramcharan	Wisconsin	Alabama	Travel	Active	3/24/2021		CWI210324-003-rc201012-03
Kumar	Sathivel	Alaska	Alabama	Travel	Closed - Withdrawn	3/24/2021	3/24/2021	CAK210324-003-SK210317-01
charan	ramcharan	Wisconsin	Alabama	Travel	Active	3/24/2021		CWI210324-004-rc201012-03
Kumar	Sathivel	Alaska	Alabama	Travel	Active	3/24/2021		CAK210324-004-SK210317-01
charan	ramcharan	Wisconsin	Alabama	Travel	Active	3/24/2021		CWI210324-005-rc201012-03
Kumar	Sathivel	Alaska	Alabama	Travel	Active	3/24/2021		CAK210324-005-SK210317-01
charan	ramcharan	Wisconsin	Alabama	Travel	Active	3/24/2021		CWI210324-006-rc201012-03

Case Search Results

By default, the Case Search Results page displays the cases in UNITY in reverse chronological order of Case Opened date.

When the user enters search criteria in the Case Search Criteria section and clicks the Search button, the matching search results are displayed in the Case Search Results section.

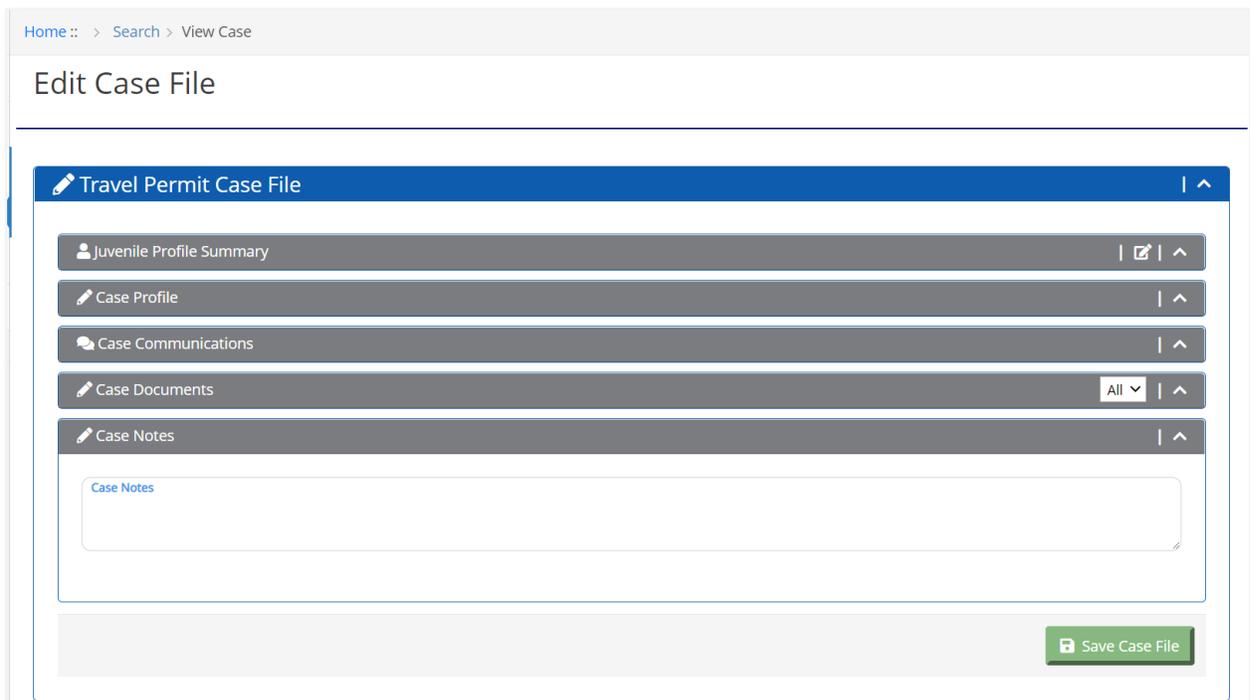
To view the case, click the **View** button.



The image shows a close-up of the first row of the 'Case Search Results' table. A red box highlights the 'View' button (represented by a blue arrow icon) at the end of the 'Case Number' column.

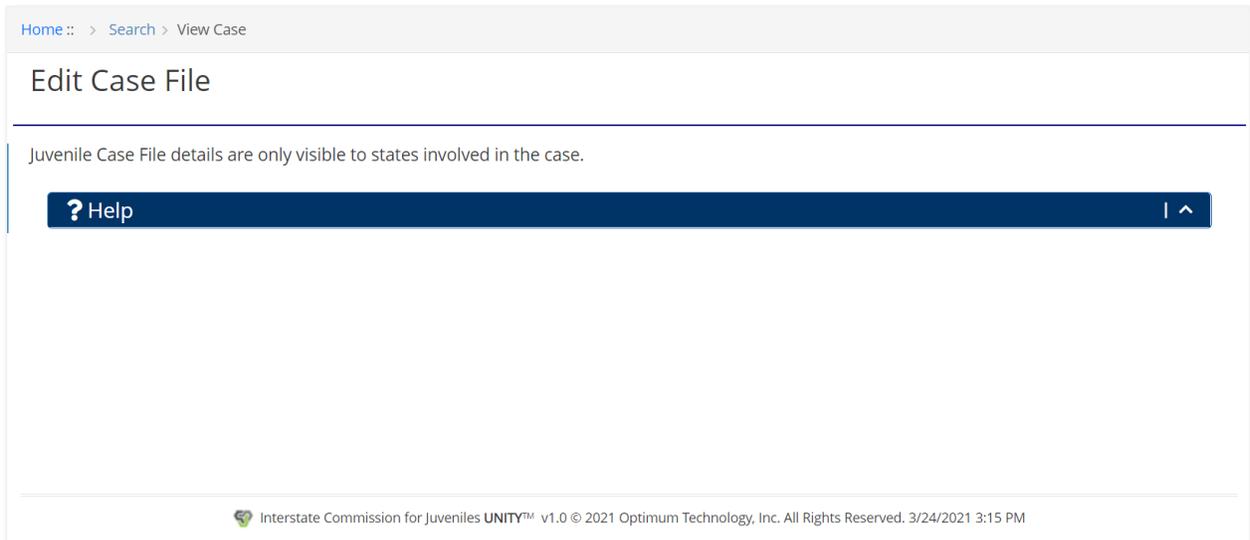
Last Name	First Name	Sending State	Receiving	Case Type	Case Status	Date Opened	Date Closed	Case Number
Kumar	Sathivel	Alaska	Alabama	Return	Active	3/24/2021		CAK210324-001-SK210317-01

When the user clicks the **View** button, the View Case page opens.



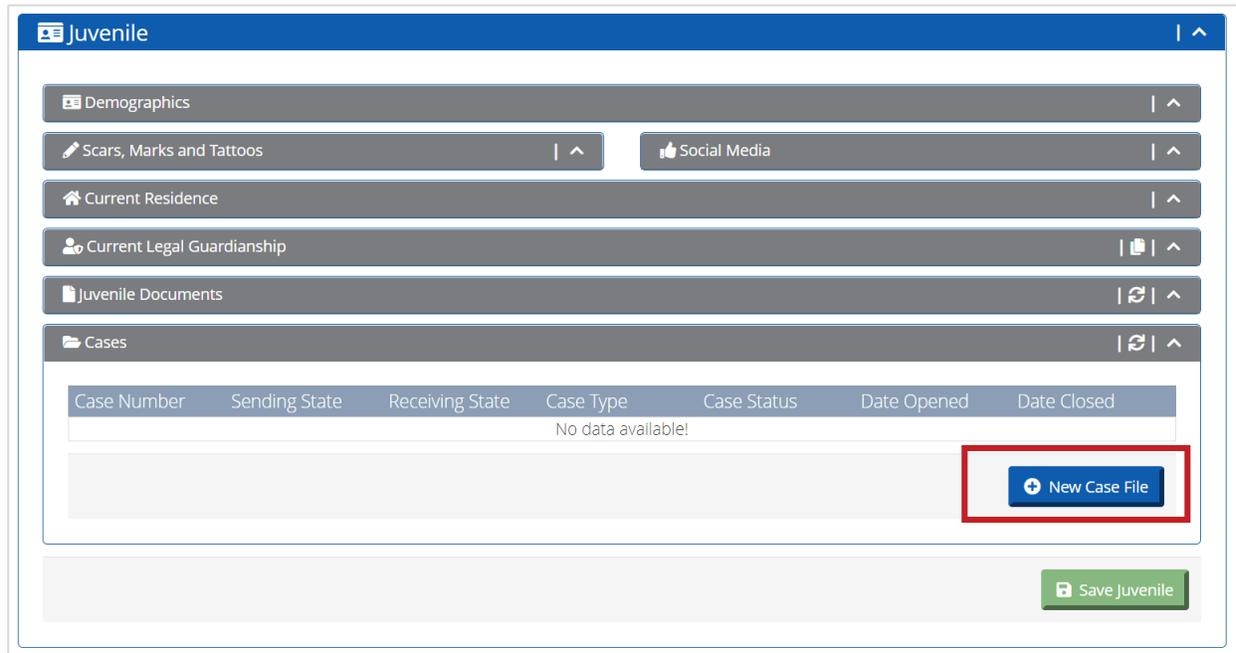
Note: The user can only view cases where their state is either the Sending or Receiving State on the case. The View Case page will not show any details if a case belonging to a different state is selected.

If the user is not authorized to view the details of a case, an appropriate message is displayed.

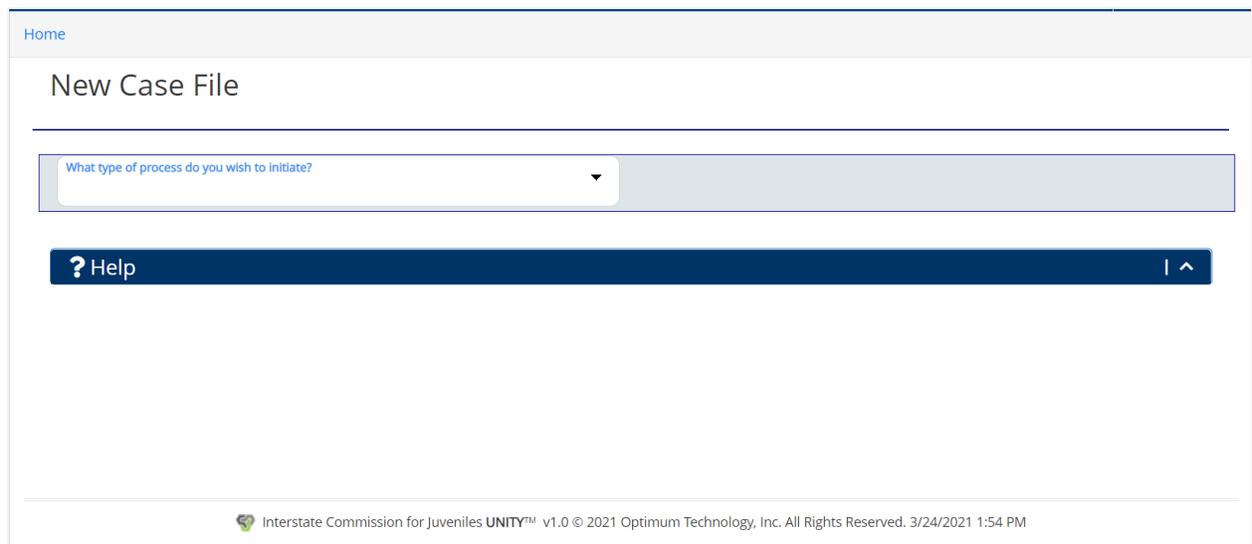


New Case

The user can create a new case by selecting the **New Case File** button in the Cases section of the Edit Juvenile page.



After the user clicks the **New Case File** button, the New Case File page opens.



The user can select the type of new case with the Case Type selector. The user can create three types of case files in UNITY: Travel, Transfer of Supervision (TOS), and Return.



The creation of a Travel, TOS, or Return case in UNITY follows a unique set of steps and is customized based on the user's inputs. The selection of the case type determines which fields the user is required to enter to create a new case.

Edit Case

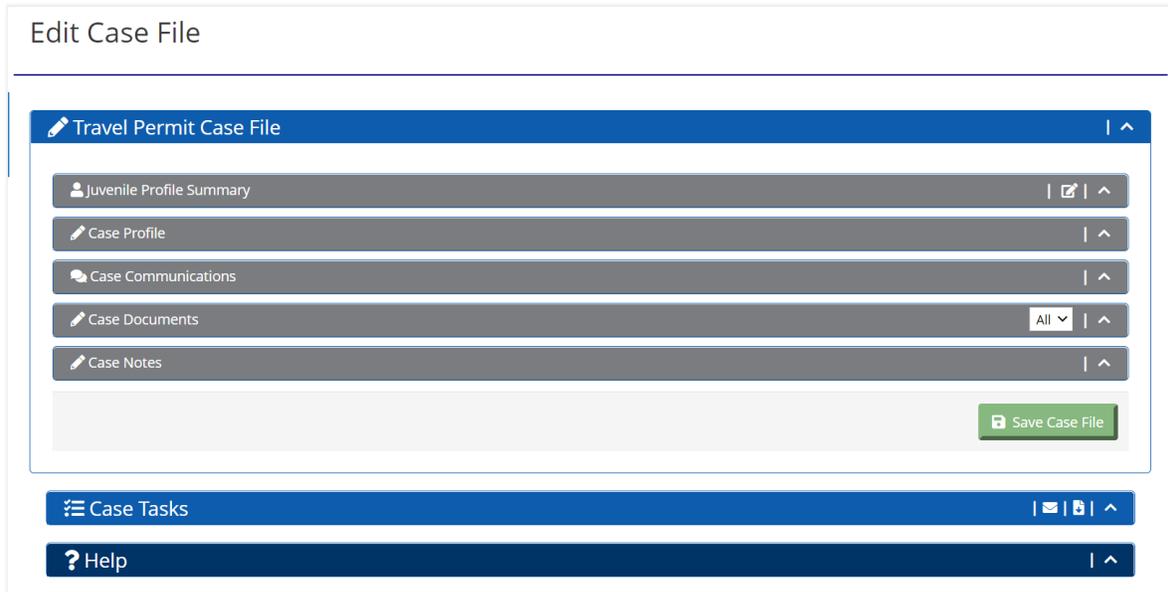
After the user completes the initial case creation steps, the Edit Case page opens. The Edit Case page is common for all the Case Types and has two sections: Case File and Case Tasks.

Case File

The Case File section is common for all case types. The name of this section is prefixed with the Case Type. For example, if you open a Travel Case, the section name is displayed as Travel Permit Case File.

The Case File section includes the information entered during the creation of the juvenile and case communications. The sub-sections include:

- Juvenile Profile Summary
- Case Profile
- Case Communications
- Case Documents
- Case Notes



By default, the sub-sections of the Case File sections are collapsed. Click the arrow to expand and review each of the sections.



Juvenile Profile Summary

The Juvenile Profile Summary sub-section displays the demographic information entered on the Edit Juvenile page. Click the **Edit Juvenile** icon to go to the Edit Juvenile page.

Juvenile Profile Summary

First Name Carl	Middle Name	Last Name Craft	Suffix
 Enlarge	Juvenile Number CC210324-01	Primary Language	Gang Affiliation
Email	Date Of Birth 3/5/2005	Current Age 16 years old	Race Other, Specify - Biracial
	Sex Male	Gender Identity	Height
	Ethnicity	Weight	Mobile Phone
	Eye Color	Hair Color	

The user can review and update juvenile information from the Edit Juvenile page.

Demographics

First Name Carl	Middle Name	Last Name Craft	Name Suffix
 Enlarge Add Remove 1 of 2	Juvenile Number CC210324-01	Nickname	Gang Affiliation
	Date Of Birth 03/05/2005	Current Age 16 years old	Primary Language
	Sex Male	Gender Identity	Marital Status
	Race Other, Specify	Specify (Race) Biracial	Ethnicity
Weight In Pounds 0	Feet 0	Inches 0	Eye Color
Hair Color	Mobile Phone	Email	

Juvenile Additional Information

Click on the Save Juvenile button to save all changes and click the browser's **Back** button to return to the Edit Case File page.

Case Profile

The Case Profile sub-section displays the Case Type, Sending State, and Receiving State entered on the New Case File page.

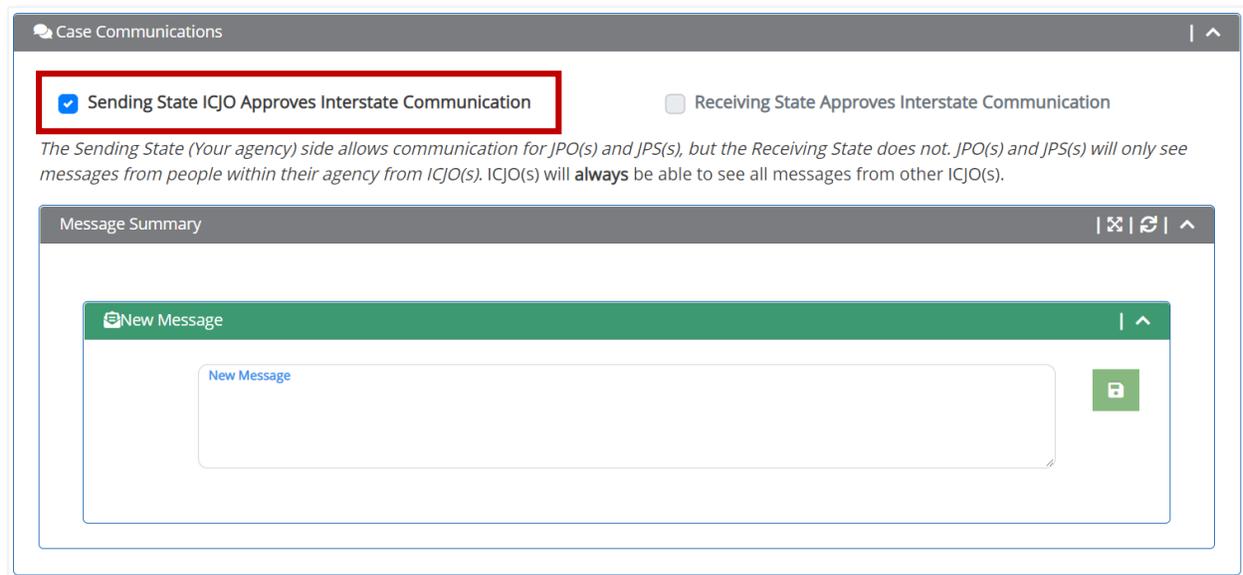
The user can select the Receiving State Officer Assigned User from the dropdown and can enter the Receiving State Court Case File Number in the textbox. The Sending State user can also click the checkbox if the Sending State wishes to return authority to approve Travel Permits.

Case Communications

The Case Communications sub-section displays a summary of all sent and received case-specific messages, and allows the user to send a new message about the case.

By default, both the Sending State and Receiving State do not allow communication across states for JPOs and JPSs. JPOs and JPSs will only see messages from users within their state agency. ICJOs are always able to see messages from the other State ICJOs.

If the **Sending State ICJO Approves Interstate Communication** option is selected, the Sending State allows interstate communication for JPOs and JPSs. For this to be a two-way communication, the Receiving State ICJO must also allow JPO/JPS interstate communication.



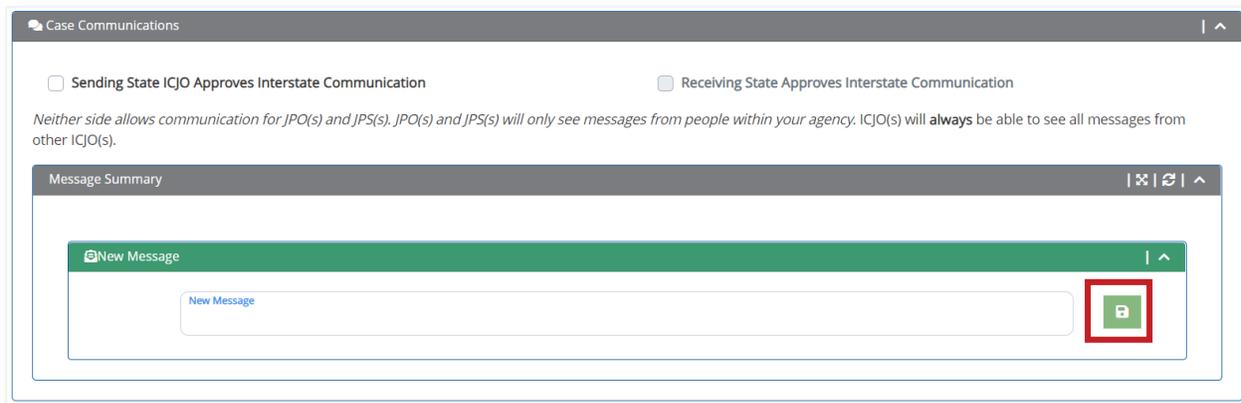
When the Receiving State ICJO edits the case, the **Receiving State Approves Interstate Communication** option is available for selection.

If the Receiving State Approves Interstate Communication is clicked, the Receiving State allows interstate communication for JPOs and JPSs.

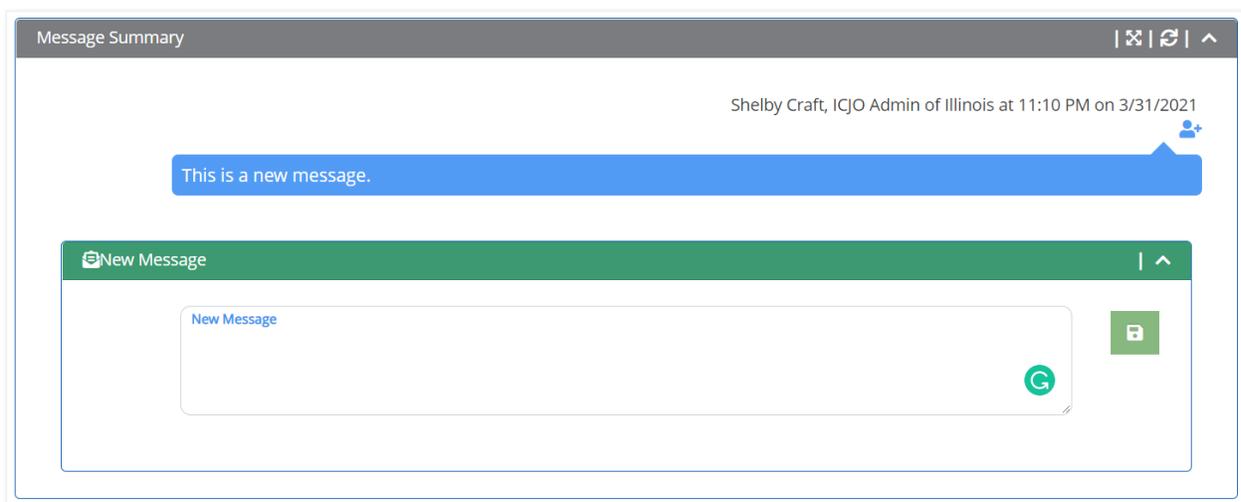
If both options are clicked, both the Sending State and Receiving State allow interstate communications for JPOs and JPSs. The JPOs and JPSs will see messages from both the Sending State and the Receiving State.



To send a message to another agency contact, enter the message, and click the **Save** button.

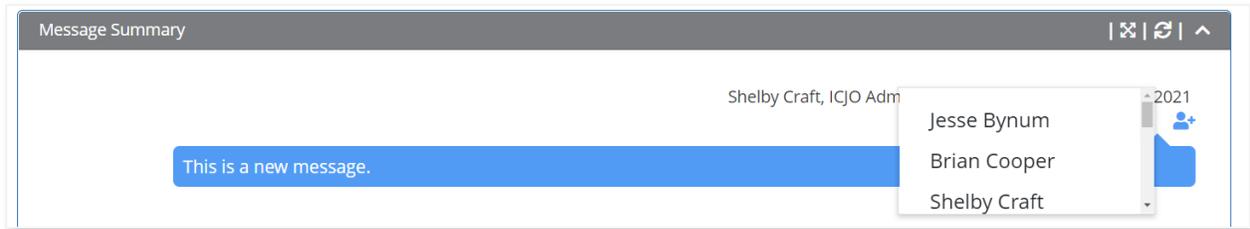


When the user clicks the **Save** button, the message displays above.

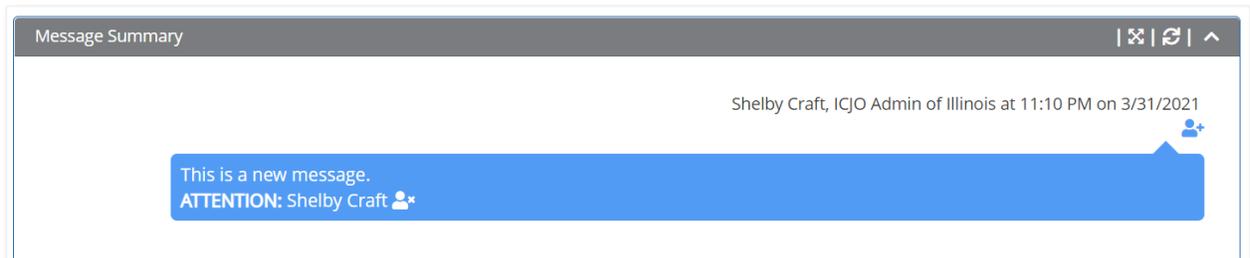


The user can tag another user by clicking the **Attention To** icon. When the user clicks the **Attention To** icon, in the top right corner of a message, a window displaying available users opens. The dropdown displays the following types of users:

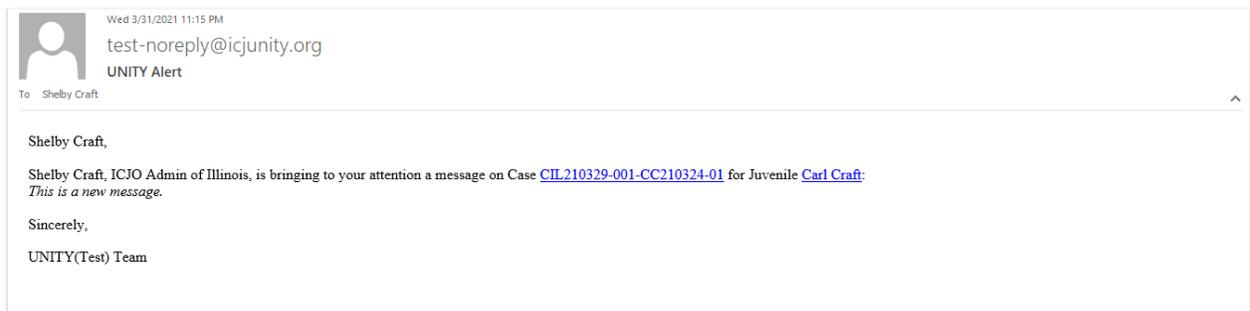
- ICJOs in the Sending State
- ICJOs in the Receiving State
- Any user that is assigned to a task in the case
- Any user that completed a task in the case
- Any user that performs an action (accept, reject, upload, and/or save) in the case



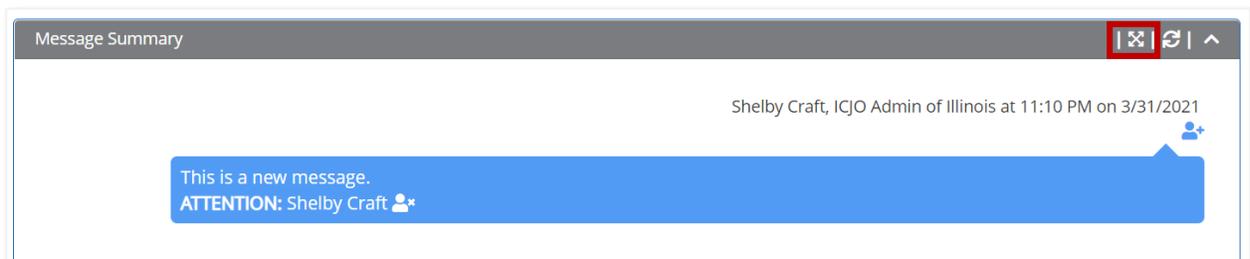
Select the user to tag the user in the message.



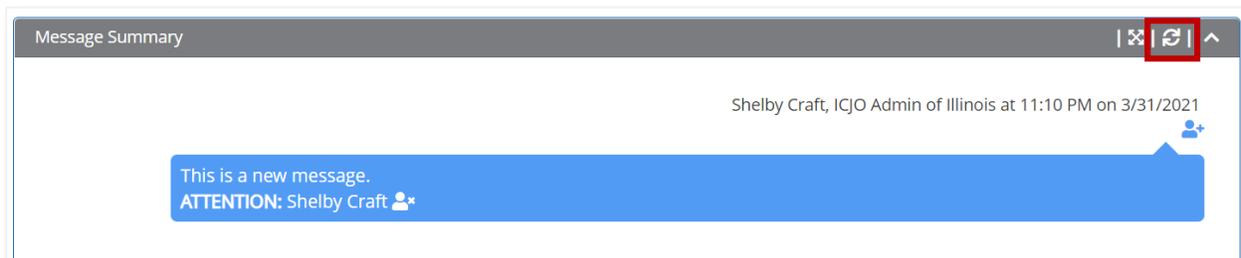
If the tagged user's email address is verified in the My Profile section, the tagged user receives an email notification.



Click the **Expand/Collapse** icon in the Case Communications section to show all messages.



Click the **Refresh** button to refresh the messages in the Case Communication section.

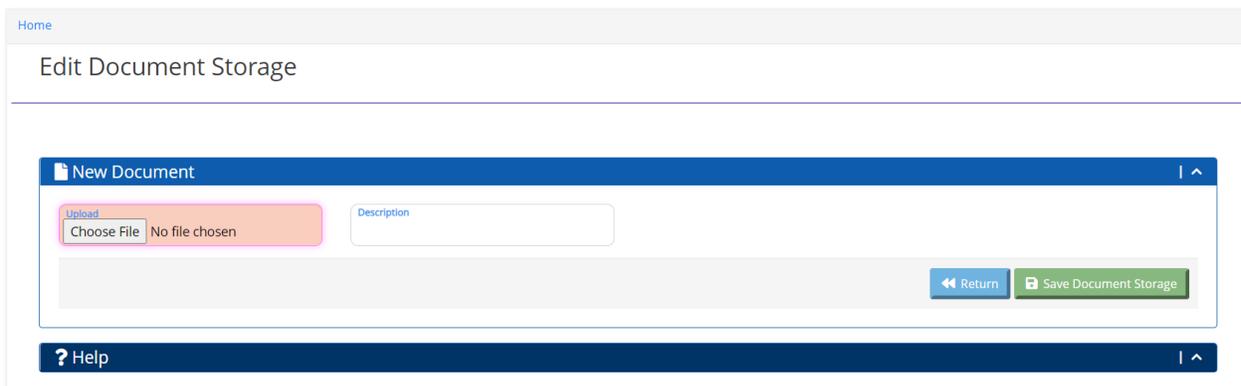


Case Documents

To upload a document to the case file, expand the Case Documents section and click the **New Document** button.



The Edit Document Storage page opens. Locate the document to upload and click the **Save Document Storage** button.

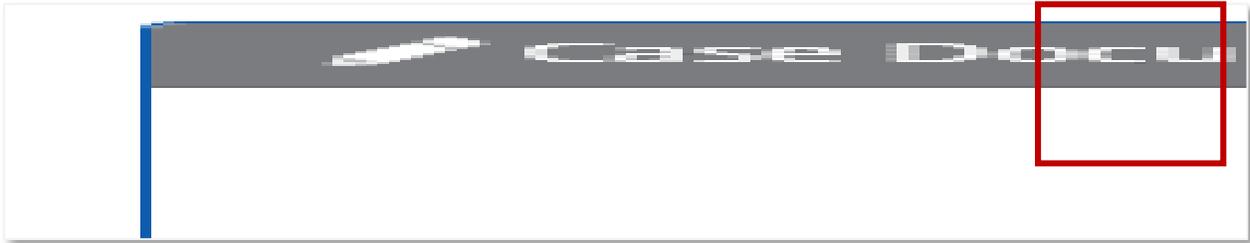


The uploaded document will appear in the Case Documents sub-section on the Edit Case File page.

The user can view All documents in the Case Documents section or filter the documents based on the following:

- Documents available under Case Tasks groups
- Sending State Documents
- Receiving State Documents

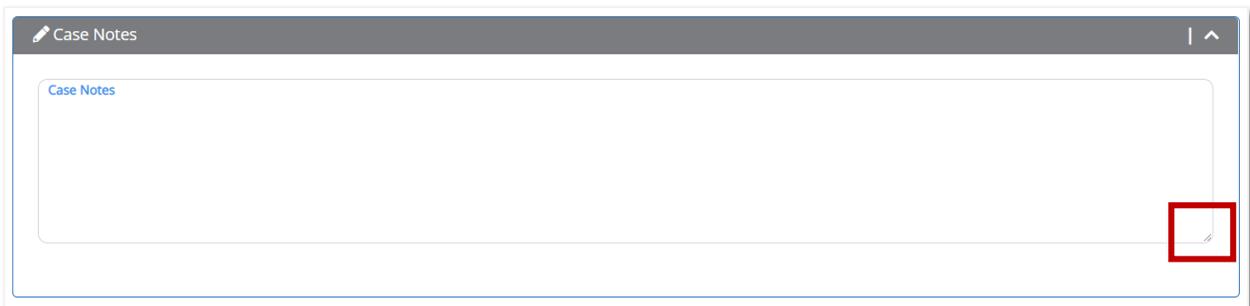
- Users that uploaded documents



If there are no documents, the filter does not display anything.

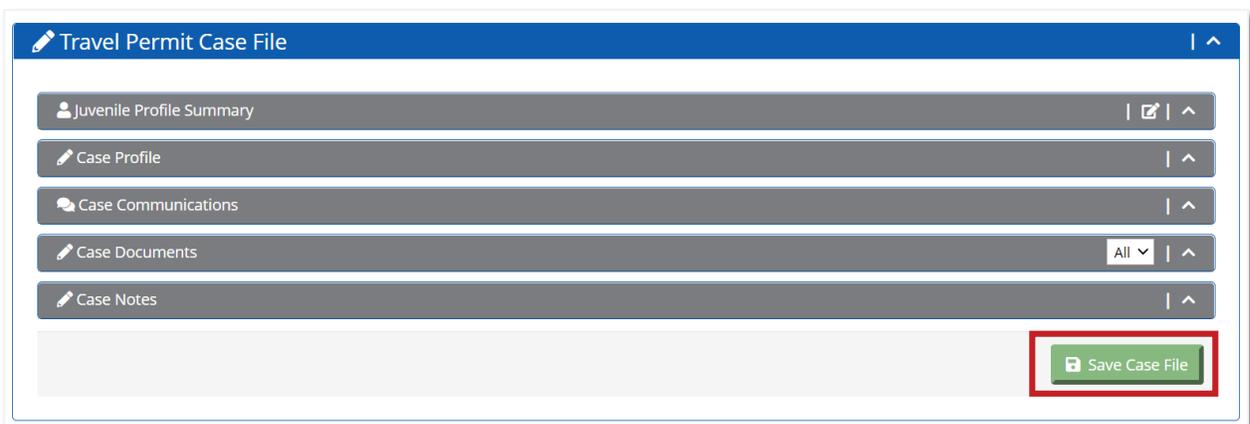
Case Notes

The Case Notes displays the notes entered by the user. The user can click the Expander to expand the Case Notes textbox.



Save Case

The user can click the **Save Case File** button to save changes made in the Travel Permit Case File section.



Case Tasks

The Case Tasks section allows the user to complete the sections that pertain to the case. The first and last name of the juvenile is always visible in the blue section header of the Case Tasks section.

The common elements of the Case Tasks section are explained in this section. The case type-specific elements of the Case Tasks section are explained in the respective Travel, TOS, and Return manuals. The Case Tasks section contains the following:

1. Case Tasks Column Selector
2. Case Tasks Grid
3. Events List

Column Selection

The user can choose to include or exclude certain details in the Case Tasks grid by selecting appropriate column selections in the Case Tasks section.

Task	Assigned to	Zone	Completed by	Completed Date
Juvenile Profile Current Residence/Legal Guardian (✓)	ICJO			
Transfer of Supervision Referral (✓)	ICJO			
Court Case (✓)	ICJO			
TOS Referral/Court Case Submission (1*)	ICJO			
Additional Court Case (1*)	ICJO			

The Case Tasks grid displays the Task Name and Completed Date columns by default. The Assigned To, Zone, and Completed By are optional columns that the user can choose to include in the Case Task grid. To add Assigned To, Zone, and/or Completed By columns to the Case Tasks grid, click the appropriate selections in the Case Tasks Column Selector. After the user selects the columns in the Case Tasks Column Selector, the same columns appear in all Case Tasks grids each time the user logs in.

The user can also set the default column preferences on the Edit Profile page.

Task Grid

The Case Task grid lists all the workflow tasks specific to this case.

Task	Assigned to	Zone	Completed by	Completed Date
Juvenile Profile Current Residence/Legal Guardian (✓)	ICJO			
Transfer of Supervision Referral (✓)	ICJO			
Court Case (✓)	ICJO			
TOS Referral/Court Case Submission (1*)	ICJO			
Additional Court Case (1*)	ICJO			

Sending State Events
 Receiving State Events

Task Header

Case tasks are logically grouped together in the Case Tasks section. The blue bar with a folder icon in the Task header that groups a set of tasks. Tasks grouped within a Task header can be compared to files kept within a folder.



The Task Header contains a collective name and completion date for this group of tasks. Depending on the Column selections chosen by the user, the default Assigned To and Zone information is also displayed.

The user can add other pertinent documents to this group of tasks by clicking the Add (+) icon in the top right corner of the Task Header.

Task List

A list of tasks to be completed is displayed under each Task Header. There could be one or more tasks under each Task Header.

Task	Assigned to	Zone	Completed by	Completed Date
Juvenile Profile Completion (1*)	ICJO			Due 4/1, 2 days left
IL Current Residence*	Shelby Craft	Boone County Probation		
Travel Information (1*)	ICJO			Due 4/1, 2 days left
IL Travel Information*	Shelby Craft	Boone County Probation		
Court Case Information (1*)	ICJO			Due 4/1, 2 days left
IL Court Case Information*	Shelby Craft	Boone County Probation		

The first column in the Task Grid displays the abbreviation of the state (example: **IL**) that is responsible for the completion of this task.

The Task column in the Task grid displays the task name. A required task row is shaded in salmon color to indicate that the task must be completed by the State. An optional task may also be listed under the same Task Header.

The Assigned To column displays the user to whom this task is assigned to. Tasks could be assigned to a generic user group/role, which can then be reassigned to a specific user by clicking on the Edit icon next to the Assigned To user/group name.

The Zone column displays the zone that the task is assigned. Some tasks may not have a zone assignment and will be blank in which case a State ICJO user can update this task. A specific zone could be assigned to this task by clicking on the Edit icon and selecting a zone.

The Completed By column shows the name of the user that completed this task. When the task is not completed, this column value is blank.

The Completed Date column shows the completed date or the completion due date. When a task is yet to be completed, it shows the completion due date and a countdown of the number of days left to complete the task. When a task is not completed before the due date, the Completed Date shows Overdue and the number of days it has been overdue. When the user completes a task, the Completed Date column will have the actual date of completion of this task.

Task Types

There are different types of tasks and each one of them has specific functions associated with it.

Data Entry Tasks

Data entry tasks are the tasks where user input is required. Examples of data entry tasks include Travel Information or Court Case Information.



Users can click on the **plus** icon of data entry tasks to open the relevant section with input fields.

The salmon-colored fields with a pink halo indicate required fields. The user must enter data in these fields if not already present. Once the user has entered data in a required field and tabs out, the salmon-colored background disappears and the pink halo remains to indicate the required criteria of these fields.

UNITY pre-fills data in the fields where the relevant information was previously entered by the user and is readily available and relevant in this scenario. Users can then review all the details and update information if required before saving the data entry task.

Once the user enters data in all fields and clicks the **Save** button of the section, the data entry section automatically closes and the salmon color around the task line disappears and becomes white.



A green checkmark appears next to the task line to indicate this task is completed. The Completed By and Completed Date indicate the user who completed the task and the date when it was completed.

An **edit** icon appears in the task line to allow users to edit the task details as long as the case has not been submitted to the other state.

Generate Tasks

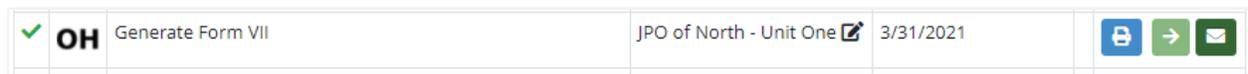
Generate tasks are the tasks where the user can click a button to generate a completed Form PDF file using the input data provided in UNITY. Examples of Generate tasks include Generate Form VII or Generate Travel Plan.



Click the **Printer** icon to generate the form indicated in the Task Name.

While the form is generating, a **gear** icon is displayed to indicate form generated is in progress.

Once form generation is complete, a green checkmark appears next to the task name and two additional icons appear next to the printer icon.



The user can view the generated document by clicking the **arrow** icon.

The user can email the generated document by clicking the **Email** icon.

Upload Tasks

Upload tasks are the tasks where a signed form or scanned document could be uploaded to the task. Examples of Upload tasks include Upload Signed Form VII.



The user can click on the **Upload Document** icon to open the Document Upload section, where a file can be selected from your computer to upload.

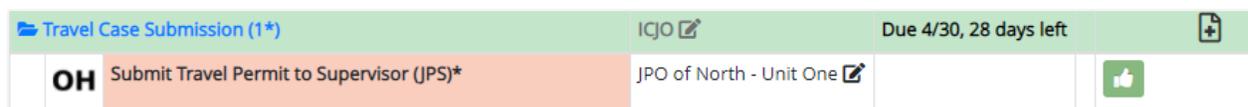
Once the file has been uploaded, additional options are presented in the Upload task.



The user can choose to upload another scanned document, erase the last uploaded document, and view or email the uploaded document.

Action Tasks

Action tasks are the tasks where the user can approve or reject a task either to submit up to the JPS/ICJO or to submit to the other State. Examples of action tasks include Submit to Supervisor, or Submit to Receiving State, etc.



When the user clicks on the green **thumbs-up** icon, the Approval Comment box opens where the user can optionally add a note.



Click the **Approve** button to move to the next task step. For example, a JPO approves a task and sends it to the JPS. When a JPS opens the case, the JPS user can approve or deny the task step. The green thumbs-up icon approves the task step and sends it to the

ICJO. The red **deny** button sends it back to the JPO for corrections. The JPS can add a comment or reason for an approval or rejection action.

OH	Submit Travel Permit to State Compact (ICJO)*	JPS of North - Unit One		
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After the JPS approves the task, the next task appears for the ICJO who in turn approves to send the case to the Receiving State.

OH	Submit Travel Permit to Receiving State*	ICJO		
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The Task Grid guides the user through each step of the data entry, generate, upload, action steps of the case. After each task line item is completed, the next logical step appears in the Task Grid. The task steps are designed to follow the Case workflow rules.

Read-Only Tasks

Once the case has been sent to the Receiving State, all the Sending State task steps are collapsed and become read-only. This is indicated by the Eye icon as shown below.

Juvenile Profile Completion (✓)		ICJO			
	OH Current Residence*	Test Testing	3/31/2021		

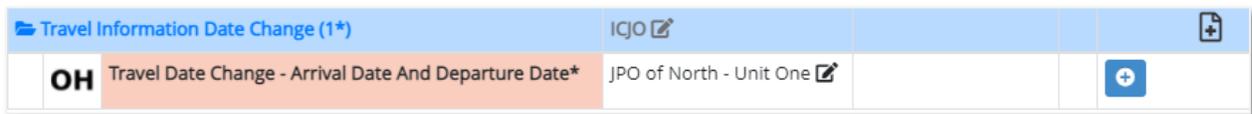
Clicking on the **Eye** icon allows the user to view a read-only view of the task details for future reference.

Events List

The Events List consists of Sending State Events and Receiving State Events. Each list contains a menu of options to create an event relevant to each Case Type. The list of events presented to the user is conditional and will depend on the current workflow step of the case.

Available Sending State Events	
Sending State Events Create Event	Receiving State Events Create Event
<ul style="list-style-type: none"> Notification of Travel Date Change – Arrival Date & Departure Date Notification of Travel Date Change – Arrival in Receiving State Notification of Travel Date Change – Departure from Receiving State Request for Sex Offender Registration Requirements Request for Victim Notification Assistance Withdraw Travel Case 	

Choose the event from the list and click on Create Event. This will create a new Task Header with one or more new tasks in the task group.



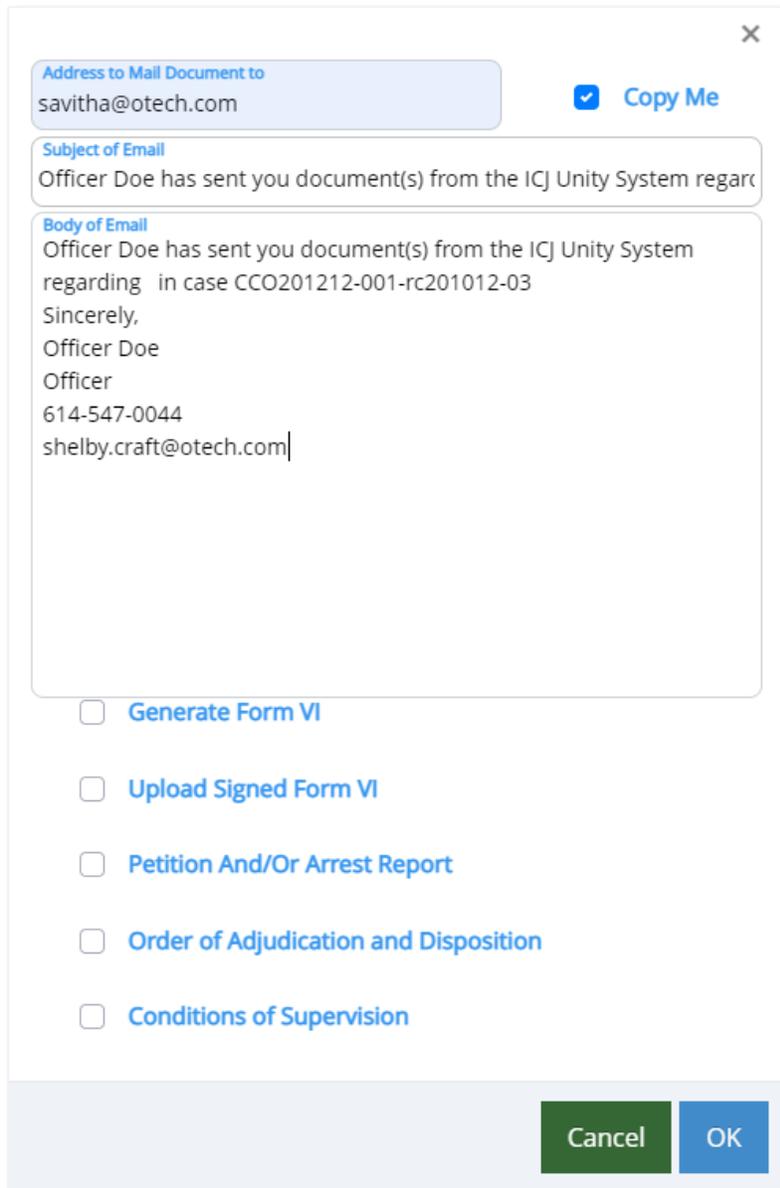
Email Case Files

The user can click on the email icon in the Case Tasks grid.



A popup box opens with a default template appears.

The user can enter an email address in the Address to Mail Document to field, edit the Subject and/or Body of the Email. The user can select one or more case documents listed to attach in the email. To send a copy of this email to the user's email address, select the "Copy Me" checkbox. This requires a verified email address in the User Profile page of the logged-in user. Click the OK button to send the email.



Address to Mail Document to
savitha@otech.com

Copy Me

Subject of Email
Officer Doe has sent you document(s) from the ICJ Unity System regard

Body of Email
Officer Doe has sent you document(s) from the ICJ Unity System regarding in case CCO201212-001-rc201012-03
Sincerely,
Officer Doe
Officer
614-547-0044
shelby.craft@otech.com

Generate Form VI

Upload Signed Form VI

Petition And/Or Arrest Report

Order of Adjudication and Disposition

Conditions of Supervision

Cancel OK

Download Case Files

The user can click on the Download all Files icon in the Case Tasks grid to download all case files to their computer.



A compressed zip file is downloaded and saved on the computer including all documents about this case.