



Board Billing Guide

Board Billing

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Overview

This guide explains the process of board billing in iSOMS, along with a few things you might need to take into consideration when filling out the entries in the booking. Felons (and any other state inmates) are marked for board billing when the inmate can be housed in a county jail.

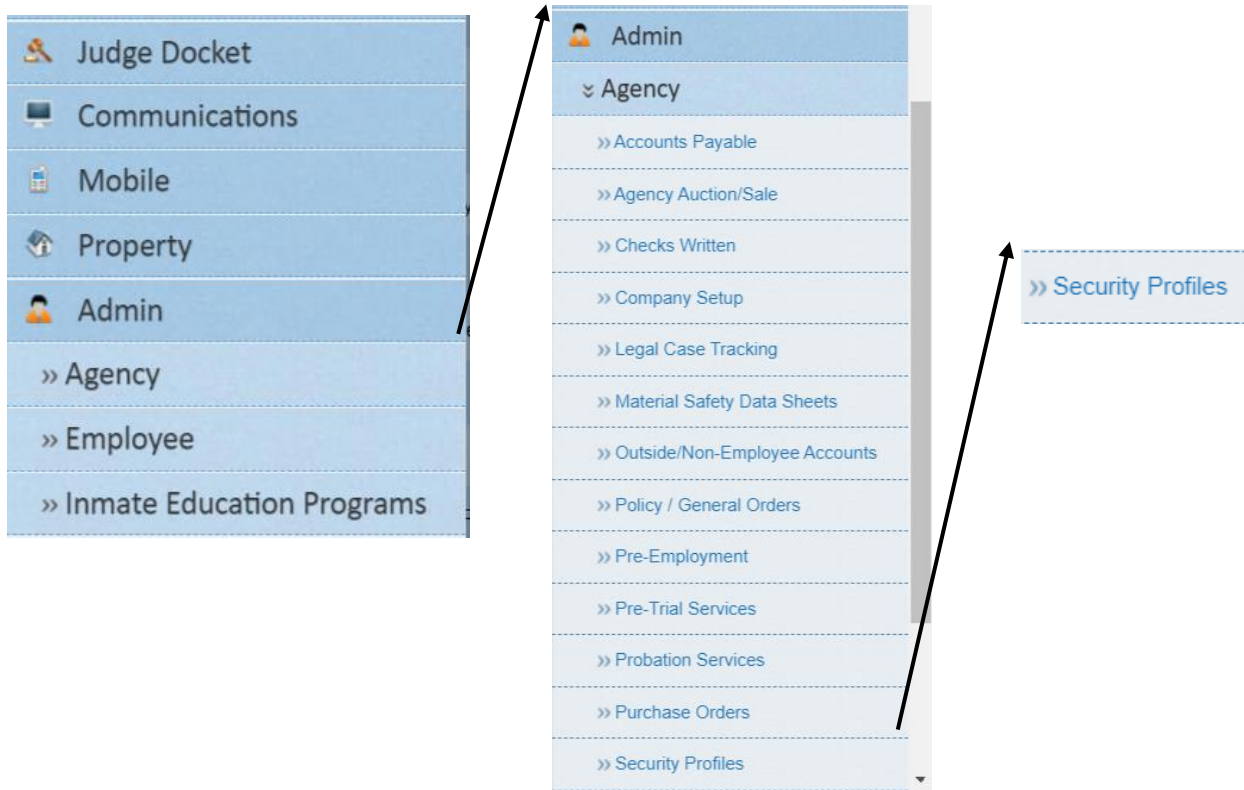
We will review how to add security profiles to make sure a user can edit and view the proper settings. We also will cover adding new auto-board billing so iSOMS will input the billing charges automatically when you add a new booking.



Board Billing Guide

Booking Security Profiles

On the Home page, Choose **Admin** → **Agency** → **Security Profiles**



This will open the **Security Profiles Search** screen. You can click **Lookup** to see all the profiles.

The screenshot shows the **Security Profiles Search** screen. It includes a search form with the following elements:

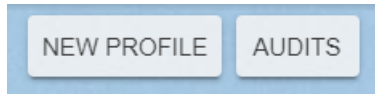
- Profile Name:** A text input field.
- Filters:** Three checkboxes: ☐ Super User, ☐ Show All Agencies, and ☐ Show Archived.
- Buttons:** Two buttons, **LOOKUP** and **CLEAR FILTER**, are located at the bottom of the form.

An arrow points from the **LOOKUP** button to the **LOOKUP** button in the second screenshot.



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To add a new profile, click **New Profile** in the upper right corner of the search screen.



The name of the security profile is not critical. We will use **Booking Officers** here just for reference, but just ensure that you assign that profile to the correct users later.

Name
Booking Officer

Description
BOOKING OFFICER GENERAL

After you choose or add a new security profile, you will view the profile on the next screen.

Security Profiles: View Record LOOKUP

<< FIRST < PRIOR NEXT > LAST >> SAVE DELETE

Name
BOOKING

Description
BOOKING OFFICER GENERAL ☐ Agency Super User

Profile Permissions			Module Permissions
<input type="checkbox"/> Hide Print To Email <input type="checkbox"/> Hide Continuing Education <input type="checkbox"/> Hide Reminders <input type="checkbox"/> Hide Uniform <input type="checkbox"/> Hide Contract Info <input type="checkbox"/> Hide Search Menu <input type="checkbox"/> Employee Notifications Super User <input type="checkbox"/> Hide Email <input type="checkbox"/> Hide Text <input type="checkbox"/> View Internal Affairs <input type="checkbox"/> View Undercover Name List	<input type="checkbox"/> Employee Records <input type="checkbox"/> Hide Bio <input type="checkbox"/> Hide Weapon <input type="checkbox"/> Hide Payroll <input type="checkbox"/> Hide Supervisor <input type="checkbox"/> Hide Medical <input type="checkbox"/> Hide Rank <input type="checkbox"/> Hide Phone List <input type="checkbox"/> Hide Compliance <input type="checkbox"/> Hide HR <input type="checkbox"/> Hide Topics Menu <input type="checkbox"/> Hide Assigned Items	<input type="checkbox"/> Booking Records <input type="checkbox"/> Notifications Super User <input type="checkbox"/> Hide Inmate Medical <input type="checkbox"/> All Changes After Release <input type="checkbox"/> Incident / K9-Incident Reports <input type="checkbox"/> Public Version Only <input type="checkbox"/> Assign Reports <input type="checkbox"/> Approve Reports <input type="checkbox"/> Clear Reports <input type="checkbox"/> Jail Incidents <input type="checkbox"/> Assign Reports <input type="checkbox"/> Approve Reports <input type="checkbox"/> Clear Reports	<input checked="" type="checkbox"/> Exclude From Employee Notifications <input type="checkbox"/> Exclude From General Orders <input type="checkbox"/> Exclude From Personal Information <input type="checkbox"/> Exclude From Employee Messages <input type="checkbox"/> Exclude From Group Email <input type="checkbox"/> Hide Department Forms <input type="checkbox"/> Allow Shift Note Protected Departments <input type="checkbox"/> Allow Inmate Classification <input type="checkbox"/> Allow Inmate Sentence Edit <input type="checkbox"/> Allow PassOn Major Change <input type="checkbox"/> PassOn Administrator <input type="checkbox"/> PassOn Supervisor <input type="checkbox"/> Jail Investigations <input type="checkbox"/> Payroll Supervisor <input type="checkbox"/> Select PassOn Major <input type="checkbox"/> Show Department Policy <input type="checkbox"/> Exclude Email Text All Users <input type="checkbox"/> Email Send To Internet Only <input type="checkbox"/> Email Can Only Send Internal <input type="checkbox"/> Purchase Order Administrator <input type="checkbox"/> Receipts General Only

Click on the **Module Permissions** tab, and then scroll down to the **Booking** module.

Module Permissions



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Module	Module
Arrest (legacy winsoms)	Booking
BOLO	<input type="checkbox"/> Super User
Booking	<input type="checkbox"/> Hide File Links
Booking Import	<input checked="" type="checkbox"/> Can View
Booking Meals	<input checked="" type="checkbox"/> Can Add
Booking Medical (booking) Attachments	<input checked="" type="checkbox"/> Can Edit
Booking Medical Attachments	<input type="checkbox"/> Can Delete
Booking Medical Chart Notes	<input type="checkbox"/> Hide Images
Booking Meds (Notes, Images, Attachments)	<input type="checkbox"/> Hide Notes
Booking Notifications	<input type="checkbox"/> Hide Print To Email
Booking Sentence	<input type="checkbox"/> Hide Export To Xls
Building Maintenance	<input type="checkbox"/> Hide Export To Csv
Building Parts	<input type="checkbox"/> Hide Export To Db
Building WorkOrder	<input type="checkbox"/> Hide Export To Zip
Business Contacts	<input type="checkbox"/> Hide Module Scans/Attachments
CAD Alerts	<input type="checkbox"/> Exclude From Push Notifications
CAD Burn Permits	<input type="checkbox"/> Hide Appointments
CAD Department Email	<input type="checkbox"/> Hide Visitation
	<input type="checkbox"/> Hide Billing
	<input type="checkbox"/> Hide CheckLists
	<input type="checkbox"/> Hide Classification
	<input type="checkbox"/> Hide Commissary
	<input type="checkbox"/> Hide Housing
	<input type="checkbox"/> Hide Incidents
	<input type="checkbox"/> Hide Incompatibles
	<input type="checkbox"/> Hide Meals
	<input type="checkbox"/> Hide Mail Log
	<input type="checkbox"/> Hide Medical
	<input type="checkbox"/> Hide Tracking/Movements
	<input type="checkbox"/> Hide Release Contacts
	<input type="checkbox"/> Hide Sentence
	<input type="checkbox"/> Hide Victims
	<input type="checkbox"/> Hide Visitation

IMPORTANT: Notice Booking *Can View*, *Can Add*, and *Can Edit* should be checked at minimum. This allows this security profile to get into the booking module, add new records, etc. Without this, they cannot add or look up the inmate in the records.

<input type="checkbox"/> Super User
<input checked="" type="checkbox"/> Can View
<input checked="" type="checkbox"/> Can Add
<input checked="" type="checkbox"/> Can Edit
<input type="checkbox"/> Can Delete

For users you **DO** want to see Board Billing, make sure that the **Hide Billing** checkbox is *not* checked. If this checkbox is not checked, then users with this profile can see board billing.

For users you **DO NOT** want to see Board Billing, have the **Hide Billing** checked to *prevent* users with this profile from seeing board billing.

<input checked="" type="checkbox"/> Hide Billing
--

For example:

CAN see board billing

<input type="checkbox"/> Hide Appointments
<input type="checkbox"/> Hide Visitation
<input type="checkbox"/> Hide Billing
<input type="checkbox"/> Hide CheckLists
<input type="checkbox"/> Hide Classification
<input type="checkbox"/> Hide Commissary

CANNOT see board billing

<input type="checkbox"/> Hide Appointments
<input type="checkbox"/> Hide Visitation
<input checked="" type="checkbox"/> Hide Billing
<input type="checkbox"/> Hide CheckLists
<input type="checkbox"/> Hide Classification
<input type="checkbox"/> Hide Commissary

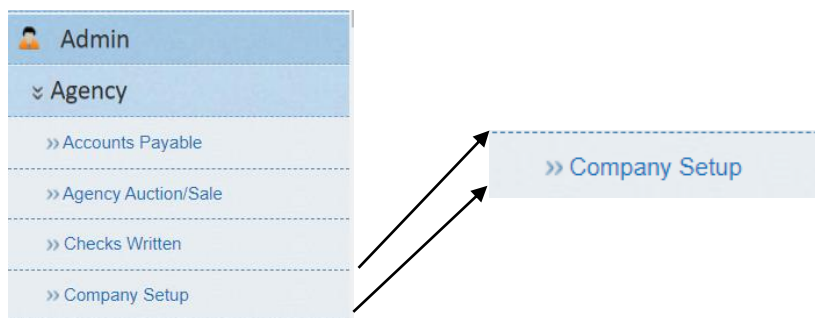


Board Billing Guide

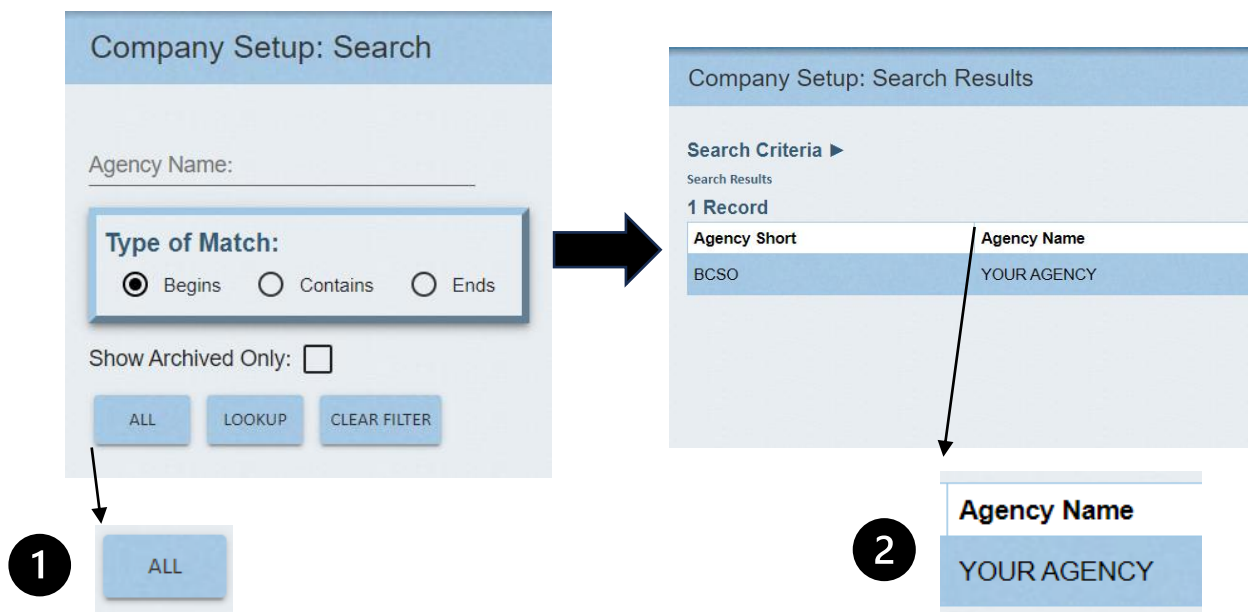
Auto-Billing Settings

In this section, we will take a look at the settings available for auto-billing. Note that this section does not explain how to set up auto-billing itself, as that is described in the next section on page 8. This section only pertains to settings for the control and use of auto-billing. One of the settings in this section is useful for setting up auto-billing to your state's department of corrections. For this, keep reading or see NEW-BOOKING-DEFAULT-DEPARTMENT on page 7.

To edit the auto-billing settings, choose **Admin → Agency → Company Setup**



On the Company Setup Search screen, select **ALL** and then double click your agency's name on the table.





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Select the **Settings** tabs on the next screen of Company Setup.

Company Setup: View Record

LOOKUP AUDITS BACK TO SEARCH RESULTS TOPICS ADD REPORTS MAINTAIN FILE

<< FIRST < PRIOR NEXT > LAST >> SAVE DELETE

Agency Name: YOUR AGENCY Agency Short: BCSO Agency #: 3 OR#: TN0000000 Contributor Block Login

House #: 1905 Street: HIGH PARK CIR Apt/Lot #: City: MARYVILLE State: TN ZipCode: 37803 County: BLOUNT

Phone #: (865)-380-4600 Fax #: MYAGENCYEMAIL@EMAIL.COM Website: WWW.MYAGENCY.ORG

Department: BLOUNT COUNTY SHERIFF'S OFFICE SSA Facility ID: TN9876 SSA Reporter ID: 1234 IBRS/FIPS County Id:

Pay Period Days(14,28,30) Clock Card Start Date: 0

Settings

Settings

Scroll down the page and click on the **Program** drop-down menu. Use the drop-down menu and choose **Booking** to get to the booking settings.

Program

Accident

2 Settings

Setting	Setting Type	Setting Value	Description
DEFAULT-REPORT-BY	YESNO		Default = Yes. If No, on New Accident will not auto populate logged in user as Reporting Officer
GENERAL-PROPERTY-DEFAULT-DESCRIPTION	MTEXT		Default is blank. If Populated, will be the Default General Property Description, it can be changed by user

Default = Yes. If No, on New Accident will not auto populate logged in user as Reporting Officer

Program

Accident

Booking



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Then scroll through the settings to find the setting you need. They are not all grouped together because settings are listed alphabetically.

Available Settings:

AUTO-CREATE-FIRST-BOARD-BILL-RECORD

AUTO-CREATE-FIRST-BOARD-BILL-RECORD	YESNO
-------------------------------------	-------

Default: YES

Function: When this is set to **YES**, iSOMS creates a boarding bill record for the Agency Responsible for any active booking as you view them. If you want to turn off the auto-billing feature completely, set this to **NO**.

NEW-BOOKING-DEFAULT-DEPARTMENT

NEW-BOOKING-DEFAULT-DEPARTMENT	YESNO
--------------------------------	-------

Default: YES

Function: When this is set to **YES**, iSOMS adds your agency as the **Agency Responsible** for the inmate automatically. You can set this to **NO** if you want to bill another agency, such as your state department of corrections. This setting is only evaluated when **AUTO-CREATE-FIRST-BOARD-BILL-RECORD** is disabled.

AUTO-COMPLETE-OPEN-BOARD-BILL

AUTO-COMPLETE-OPEN-BOARD-BILL	YESNO
-------------------------------	-------

Default: YES

Function: When this is set to **YES**, then when you create a new board bill and any open board bills exist on that inmate's booking record, they will be completed with Today as the End Date for billing. In other words, this setting automatically ends old Board Billings when you create new billings.



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Setting Up Auto-Billing

Begin on the iSOMS home screen.

The screenshot shows the iSOMS dashboard. On the left is a sidebar menu with options: Global Records Search, System, Records, Corrections, Detective, Court, Judge Docket, Communications, Mobile, Property, and Admin. The main area is titled 'YOUR AGENCY' and contains a notification titled '1 Employee Notification'. The notification table has columns: Entry Date, Entry By, Effective Until, Reason, Title, Cleared By, Cleared Date, and Notes. The entry shows a date of 08/23/2010 and a note about a WinSOMS update. Below the table, a message states: 'There will be a WinSOMS update this wednesday at 0800 for 30 minutes.' At the bottom right, it says 'Dashboard Last Updated 05/16/2024 16:58'.

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Navigate to:

Corrections → Booking → Intake/Booking Records

This screenshot shows the iSOMS sidebar menu. The 'Corrections' option, marked with a red checkmark, is highlighted. Below it are sub-options: Administrative, Booking, and Commissary.

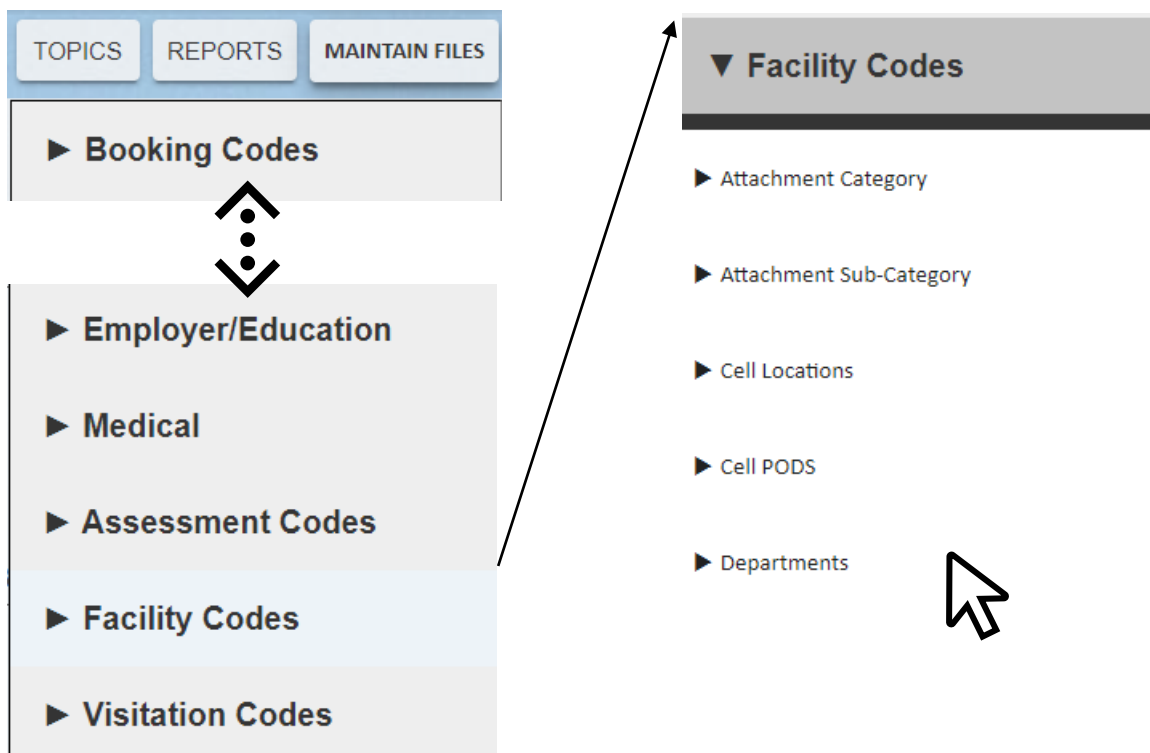
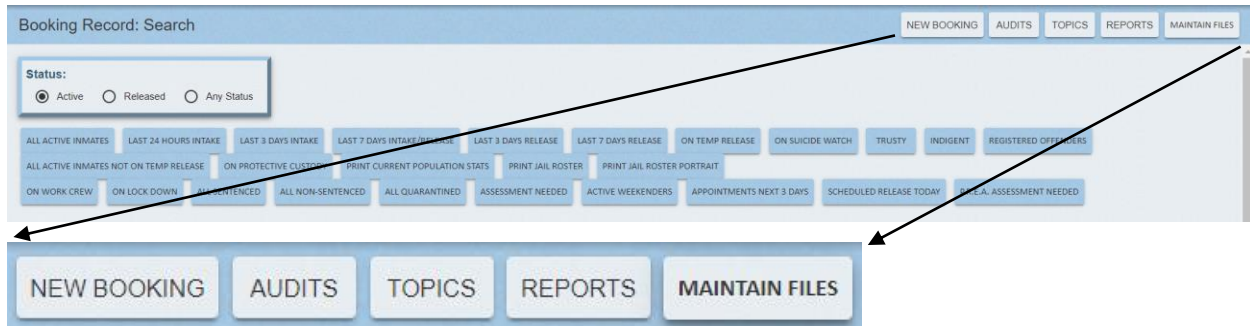
This screenshot shows the 'Corrections' menu expanded. The 'Booking' option is selected, and its sub-menu is displayed, showing 'Intake / Booking Records' as the next step in the navigation path.



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In the booking module in iSOMS, click on the following.

Maintain Files → Facility Codes → Departments



NOTE: On some monitors, it may be necessary to zoom out to see the **Departments** button.



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Click on **ALL** on the Maintain Department Search Screen:

We are looking for the department that is responsible for the board billing. This is typically the department of corrections for the state that your agency is in. For this example, we will use the *Tennessee Department of Corrections*. Find your state DOC or the responsible agency in the list and double-click it:

Agency Letters	Department Name
SPD	SPD
STATI	STATI
TDLOC	TDLOC LOCAL JAIL SENTENCE
TWRA	TENN WILDLIFE RESORCES AG
TBI	TENNESSEE BUREAU OF INVES
TDOC	TENNESSEE DEPARTMENT OF C
THP	TENNESSEE HIGHWAY PATROL
TVA	TN VALLEY AUTHORITY POLIC
TPD	TOWNSEND POLICE DEPARTMEN
TRANS	TRANSCOR AMERICA



Board Billing Guide

This will open the Department Record for your DOC. We are going to use the first tab, which will be automatically selected, **Billing**. Now you will fill out the fields in the billing tab section. They are listed below.

Maintain Department: View Record

LOOKUP NEW DEPARTMENT AUDITS BACK TO SEARCH RESULTS REPORTS MAINTAIN FILES EXIT

<< FIRST < PRIOR NEXT > LAST >> SAVE DELETE

Department Letters: TDOC Department Name: TENNESSEE DEPARTMENT OF C ORI Number: 0 Sorting Rank: 0 Department Type: Department Color: State: TN ZipCode: Latitude: Longitude: Phone #: Fax#: Email: Department Website: ☐ Include On IBR Submissions ☐ Exclude From Website ☐ Exclude From Reports

Billing CAD/Dispatch CAD Alert Level Notes Contacts Internet Accounts Images Attachments State Agency Details Special Email Events

Billing Fields

☒ Exclude From Boarding Bill

Adult Male Rate: 35.00 Adult Female Rate: 35.00 Juvenile Rate: 0 Daily Charge: 35.00 Half Day Rate: 0 No Charge Intake Date: ☒ No Charge Release Date: ☒

Bill Contact Name: Email: Billing Address Label:

Exclude From Boarding Bill

Use this checkbox if you want to exclude this department from Boarding Bills. Obviously since you are setting up board billing for the department you chose, you want to make sure this box is **not** checked!

☐ Exclude From Boarding Bill

Fields continued on the next page.



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Male / Female / Juvenile / Daily Rates

Input the Male / Female / Juvenile rates as set by your state or agency you need for the appropriate categories: male, female, and juvenile inmates. If you do not have a juvenile rate, that is not always required. You should also input the daily charge, which is often identical to the male and female rates. Half day rate is typically not used, but you may fill it in if necessary.

Adult Male Rate:

35.00

Adult Female Rate:

35.00

Juvenile Rate:

0

Daily Charge:

35.00

No Charge Intake Date / Release Date

These checkboxes control if the intake and release date should be billed. Your state or the responsible agency will have guidelines, but typically most state correction departments want both of these textboxes checked. When these boxes are checked, the intake and release date will **NOT** be billed.

No Charge Intake Date: ☒

No Charge Release Date: ☒

Bill Contact / Name / Email

These fields are for the name, email, and address label for a billing. They are filled out if you are going to make an invoice for the billing. This is not common but these fields are available if you need that option.

Bill Contact Name:

Email:

Billing Address Label:



IMPORTANT: Remember to save your changes by clicking **Save** near the top of the screen, or you may lose all your hard work!

SAVE



Board Billing Guide

Billing Information in New Bookings

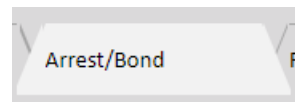
In this section, we will cover how billing information works in booking with the automatic billing feature of iSOMS, specifically for a new booking. For more information on how to make a new booking entry in general, see *Corrections Manual*, "Creating a New Booking Record."

Navigate to your booking records:

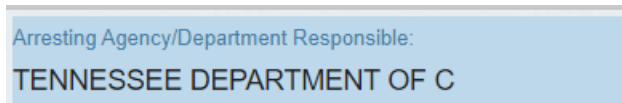
Corrections → Booking → Intake/Booking Records



Make a new booking. Once you have your booking open, go to the **Arrest/Bond** tab.



Here you want to edit the **Arresting Agency/Department Responsible** field to the same one you edited in *Maintain Files* (pg. 10) so that the billing will apply automatically. For our example in this manual, we chose *Tennessee Department of Corrections*, so we put that in this field.

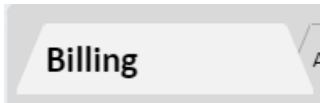


Make sure you click **Save** after filling this out. When you save this booking after adding the Department Responsible, iSOMS will automatically generate the Board Bill from the entry you provided earlier.



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If you go to the Billing tab, you can now view your Board Bill to ensure that it worked properly:



In our example, this Board Bill was automatically generated as soon as we saved the booking record. If you need to edit a booking record manually (perhaps a certain inmate has a different rate), double click on the billing and edit the appropriate fields. However, hopefully the information you added earlier in *Maintain Files* will do it automatically!

Department	Daily Rate
TENNESSEE DEPARTMENT OF C	35.00

To edit, double-click, fill out the fields, and **save**.

Department: TENNESSEE DEPARTMENT OF C

Bill Start Date: 05/20/2024 Time: 15:07:51 Bill End Date: Time: 0

Override Bill Days: 0

Daily Rate: 35.00 Half Day Rate: 0

☐ Force half day rate ☒ Exclude Start Date ☒ Exclude End Date

☐ Exclude This Record From Billing

Complementary Holds

Sometimes an inmate should be held without a board billing even though they normally would have one. In this case, navigate to the **Classification** tab and check the **Complementary Hold** checkbox to have the inmate excluded from auto billing. You may need to delete any auto billings after checking this box. If you do not do this, the system will create a new billing every time you save.

Classification

☐ Complementary Hold

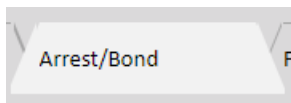


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Billing Information in Pre-existing Bookings

This section covers billing information in booking records that already exist. If you need more information on the process in general, see the preceding section, “Billing Information in New Bookings”.

You will begin by looking up a current booking (see *Corrections Manual*, “Booking Search Screen”, for info on looking up bookings). In order for this to work, you need to change the department responsible for the inmate. This change will automatically add a new billing. Once you have found your pre-existing booking, go to the **Arrest/Bond** tab.

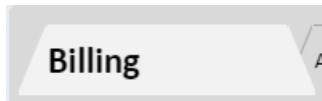


Like for a new booking, you want to edit the **Arresting Agency/Department Responsible** field to the same one you edited in *Maintain Files* (pg. 10) so that the billing will apply automatically. For our example in this manual, we chose *Tennessee Department of Corrections*, so we put that in this field. Your agency was likely here before, but you should change it at this point to get an accurate board billing.

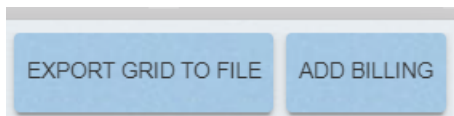
Arresting Agency/Department Responsible:

TENNESSEE DEPARTMENT OF C

Now you should navigate to the **Billing** tab.



Click **Add Billing** in the upper right corner.



This will open a box with fields to enter. Change the **department** to the appropriate one (in this example, Tennessee DOC) and then edit the **Billing Start** date to the appropriate day and time. Then click **Save**.

Make sure to save the booking itself as well.

You do not have to edit anything else here: iSOMS will automatically add the appropriate billing rate if you do a report. (Although the rate will stay at zero *here*, iSOMS will use the automatic rates when making the reports.)

Department:

TENNESSEE DEPARTMENT OF C

Bill Start Date:

11/03/2022

Time:



16:18:45



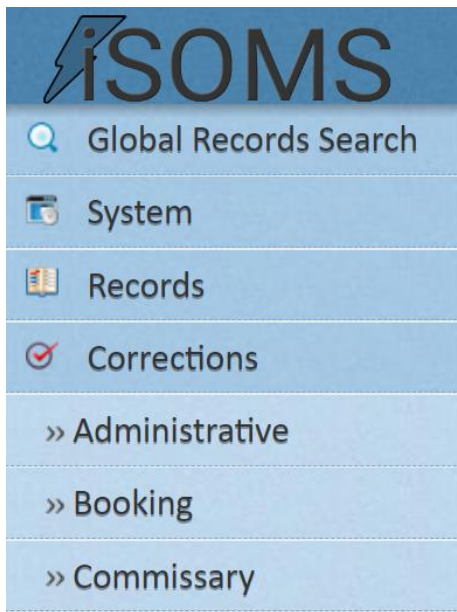
Board Billing Guide

Board Billing Report

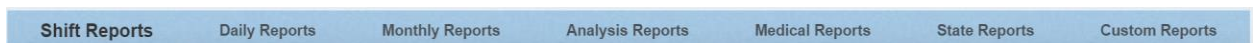
To view and create a report for board billing, you need to navigate to **Jail Reporting**.

Navigate to:

Corrections → Booking → Jail Reporting



All the headings in the blue bar will take you to different report categories and then the reports available for that category will show in the grid below.



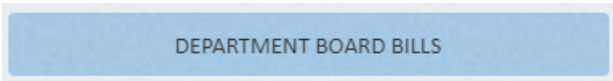
In our case, we want to find **Monthly Reports**:





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Find the **Department Board Bills** button:



This report will show the board bills over particular billing dates. It will list the inmate's name, booking number, billing rate, and the total billed over the particular billing dates. The fields are explained below.

Jail Reporting: Department Board Bills

Report Style
Board Bills

Billed Dates From: 06/06/2024 Billed Dates Through: 06/06/2024

Department:

Inmate:

☒ Use Maintain Files Departments For Rates

☐ Include All Charges ☐ Build Missing Boarding Records ☒ Evaluate Temp Releases ☐ Include Temp Release Notes

Invoice #: Invoice Date: ☐ Include Invoice Info ☐ Include Remit To Address

Report Format:
☒ PDF ☐ Excel ☐ XML ☐ SQL

[VIEW](#) [DOWNLOAD](#) [EMAIL](#) [CLEAR FILTER](#)

Report Style in this report only changes the paper rotation, but it is available if you need it.

Report Style Board Bills

Report Style Board Bills 8 X 11

Typically you will do a report on the month, so change the **Billed Dates From** and **Billed Dates Through** to match the month.

Billed Dates From: 06/01/2024 Billed Dates Through: 06/30/2024



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(continued on the following page)

For **Department**, you will want to make sure that you chose the same agency we chose in *Maintain Files* on page 10 (as an example, Tennessee Department of Corrections).

Department:
TENNESSEE DEPARTMENT OF C

Unless you need a billing report on a single individual, you do not need to fill out the **Inmate** field.

Inmate:

Make sure you check the **Use Maintain Files Departments for Rates** checkbox to use the automatic rates as explained in this guide.

☒ Use Maintain Files Departments For Rates

You are not required to fill these checkboxes in, but they can include all charges, build missing records, or include temp releases and their notes. Only use these if you need them.

☐ Include All Charges ☐ Build Missing Boarding Records ☒ Evaluate Temp Releases ☐ Include Temp Release Notes

You can use the following fields to create an invoice-like report. They are not standard practice but available if you want to create an invoice from the Board Bill.

Invoice #: Invoice Date: ☐ Include Invoice Info ☐ Include Remit To Address

Click **View** to view the report or **Download** to download it.

TENNESSEE DEPARTMENT OF CORRECTIONS								
Inmate Name	Age	Race	Sex	Booking Number	Billed From	Billed Thru	Days	Amount
O'SHELL, SHANNON KIMBERLY	59	W	F	20240500009	06/01/2024	06/30/2024	30	1050.00
ABBOTT, DARREN LYNN	0	W	M	20200900001	06/01/2024	06/30/2024	30	1050.00
ADAMS, ANDREA JOY	59	W	F	20240300010	06/01/2024	06/30/2024	30	1050.00
ALSUP, SHERMOND ARMEZ	34	B	M	2006006028	06/01/2024	06/30/2024	30	1050.00



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For More Information...

We hope this guide has been helpful to you and your agency. If you have any more questions, call us at 888-644-5786.

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