Corrections Manual

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Corrections Manual

Introduction

Welcome to the iSOMS corrections manual! This manual will take you through the entire corrections section of iSOMS:

- Administrative
- Booking
- Commissary
- Inmate Tracking
- Medical
- Visitation

Booking Overview

This first section of the manual explains how to input new bookings in iSOMS with detailed steps and visual media. iSOMS provides three different ways to create a new booking: **standard booking**, **pre-booking**, and **importing offender information** into a booking record.

Standard booking is the standard method that allows the booking officer to create a brand new booking record. There are two additional preparatory methods that might be chosen by a given agency. First, the *pre-booking* option allows some bio information to be entered by another officer before the inmate gets to a booking officer. Second, *offender information* can be *imported* to begin the booking record from an incident report that was entered into iSOMS.

If your agency has already decided whether to use standard booking vs. pre-booking/importing incidents, you may simply skip the bullet sections under "**Purpose and Overview.**" These sections compare the different methods and may not be necessary if you are not deciding which method to use.

Whether or not you choose one of these preliminary methods, the booking officer will still need to complete the standard booking process. This manual covers the initial steps for the pre-booking process and importing offender information into a record. Afterwards it explains creating and completing a booking with the standard booking process in full detail.



Figures like this will appear throughout this manual. These will remind you of important information for booking with iSOMS.

Pre-Booking

Purpose and Overview

Pre-booking allows someone other than the booking officer (usually a patrol officer) to enter some of the information for the booking ahead of time. Your agency may choose to use this option. Consider the following advantages and disadvantages of pre-booking:

- Pre-booking can save some time for the booking officer since the patrol officer already has the information. The booking officer will have some information already entered when they start the booking.



IMPORTANT: The booking officer will still have some work to do. Pre-booking reduces the amount of work for them, but it does not complete the full booking process.

- Pre-booking reduces the chance of miscommunication. The information will be put into the computer directly, hopefully with reduced chance of any misunderstandings.

- When considering pre-booking, realize this means an officer will have to input the information *twice* as they must also fill out an incident report. Consider whether you prefer the pre-booking or incident report import method.

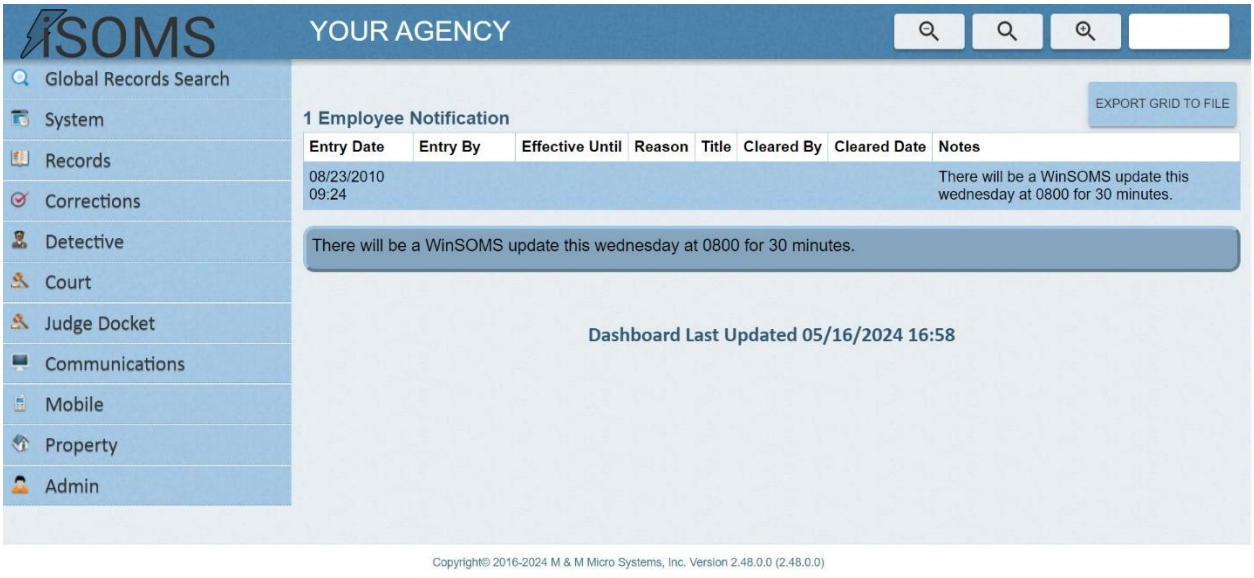
- Pre-booking must be done before the booking, but many agencies have their officers write their incident reports after booking. This does increase the time between when officers arrive with a prisoner and when the prisoner is booked. If the officers must book the prisoner before having access to a computer or before filling out incident reports, you may consider doing standard booking instead.

Be aware that the pre-booking records will be submitted by the officer, and then a supervisor must approve them before they show up in the booking records. When the booking officer begins their work, the booking is already in the booking records, so the booking officer can open the record to complete the booking.

WARNING: The pre-booking **must** be approved by a supervisor after it is *submitted*, or the booking officer will *not* be able to locate the information in the records.

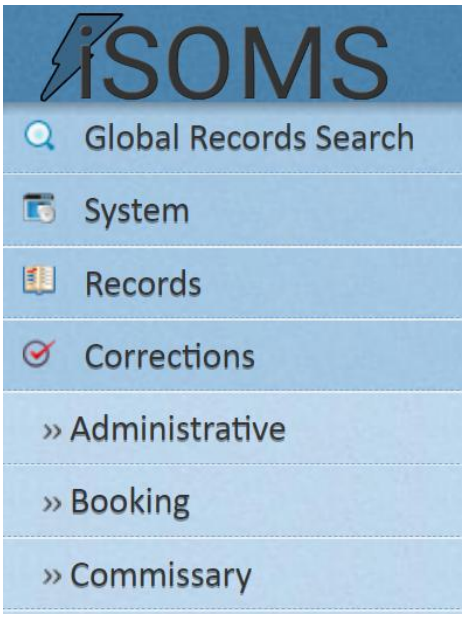
Prebooking Records

To begin a pre-booking record, begin on the iSOMS home-screen.



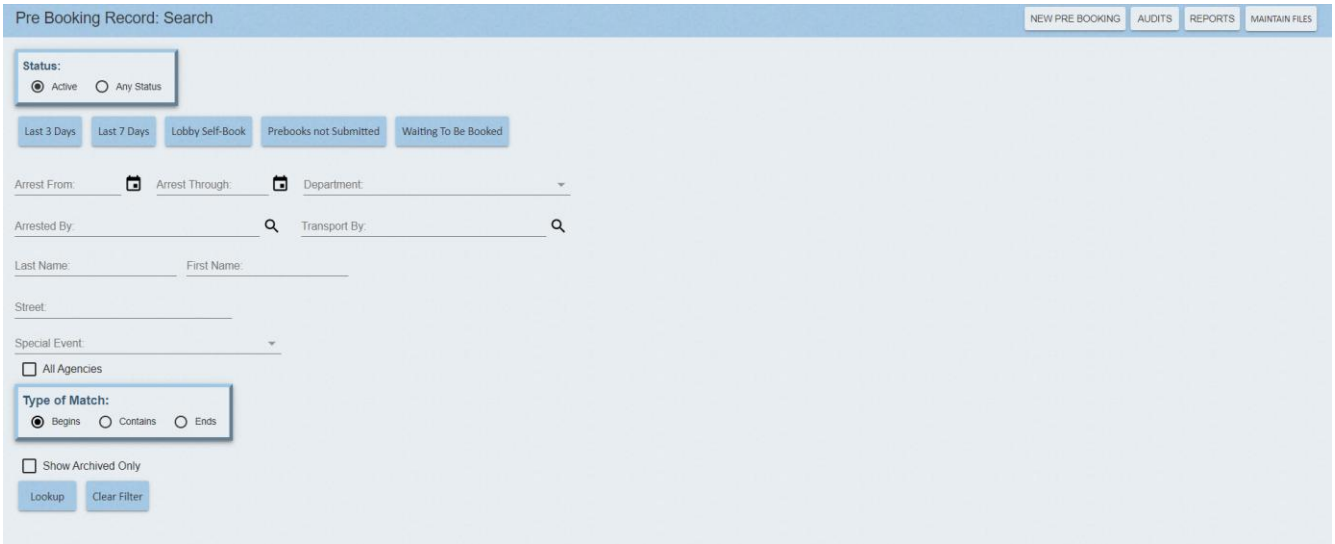
Navigate to:

Corrections → Booking → Pre Booking Records





The following screen is the search screen and menu for pre-booking records. There are several options to search for pre-booking records that have already been created. To create a new pre-booking record, you can click on the New Pre Booking button in the upper right corner.

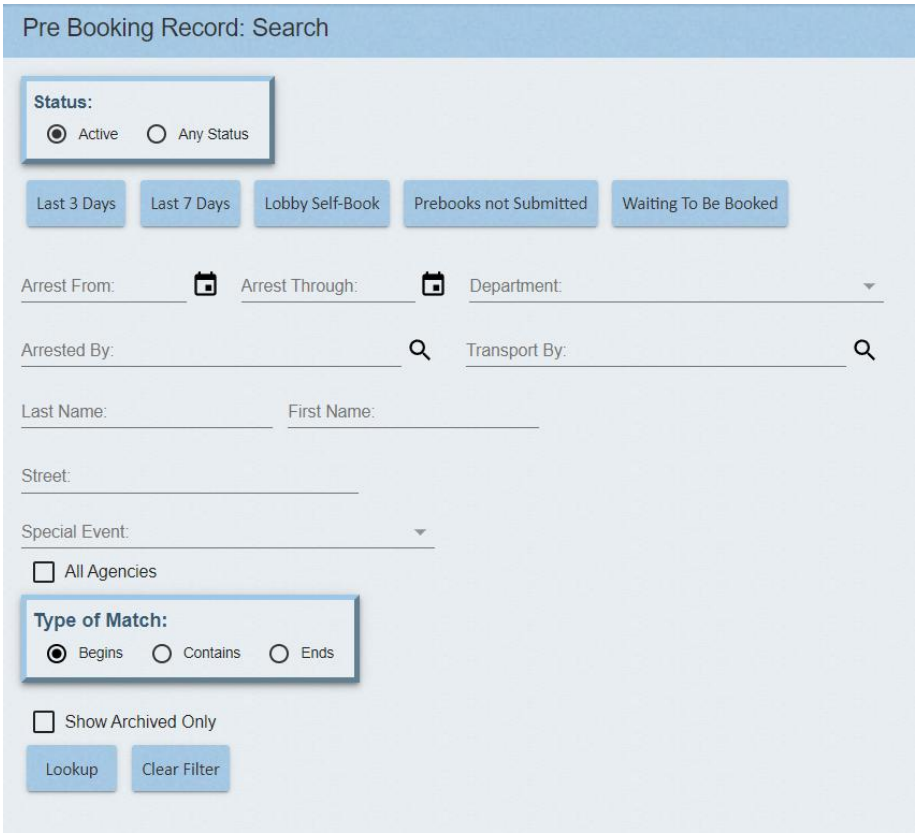


Search Screen

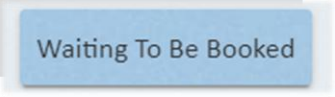
This search is **only** for pre-booking, not standard booking. Use the options if you would like to search for a specific pre-booking entry but note this is *not* a normal booking entry. To find a standard booking entry, please use the standard "booking search" (see page 42).

Use the fields provided to narrow your search. For example, you can search by arrest date or name of inmate.

To create a *new* pre-booking entry, see the next page.

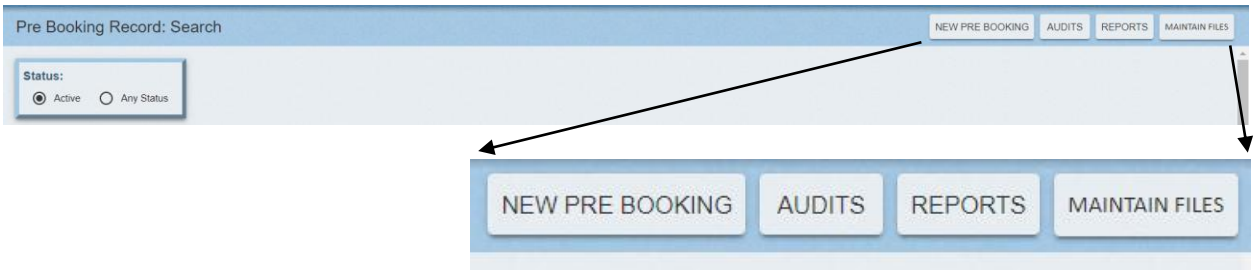


TIP: The "Waiting to Be Booked" option is a great shortcut for supervisors to approve prebooking records that have been submitted.



Creating a New Pre-booking

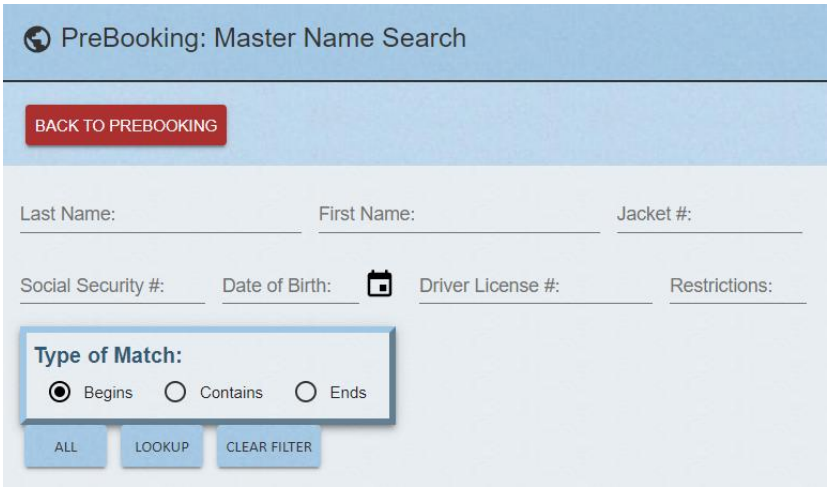
To create a new pre-booking, click "**New Pre Booking**" in the right hand corner of your screen.



Master Name Search

When you click on New Pre Booking, the following screen is the **Master Name search screen**. The Master Name system allows you to create new records, such as pre-bookings and bookings, from a single record for each person. You want to use this to either find someone's name in the Master Name records or enter a new name. You need to use an existing Master Name or create a new Master Name if you want to create a new pre booking record.



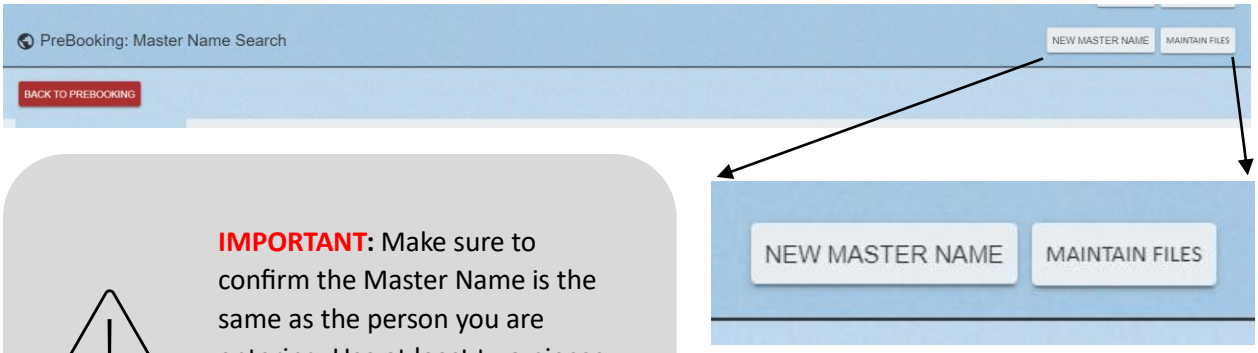


If the person being booked in already has a record in your system, you can enter information to narrow the search and click "**Lookup.**" Clicking **"All"** will show all Master Names in your system. If you are searching for a Master Name, once you enter any information to narrow the search and click "**Lookup,**" the next screen will show any results that matched your search, and you can choose the Master Name by clicking on it twice.



Confirming Master Names

Use at least two pieces of information to confirm that this is the Master Name you need to enter in the database. If the person you are pre-booking does not have a Master Name in the database, you need to create a new Master Name by clicking **"New Master Name"** in the upper right.

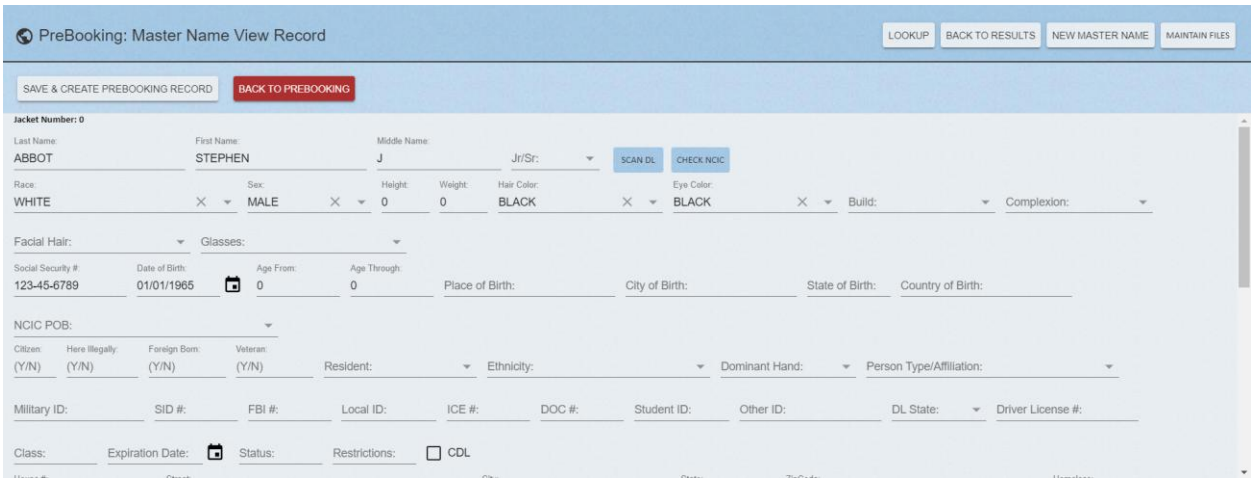


IMPORTANT: Make sure to confirm the Master Name is the same as the person you are entering. Use at least two pieces of information, such as DL # and birth date, to verify their identity.

Filling in Information about Pre Booking

Whether you added a new Master Name or used an existing one, on the following screen, you will find the Master Name information. If you used an existing one, it will be filled in. You can add additional information or edit information. Once you have confirmed that this is the correct Master Name, you can enter any additional information you need to enter.

Pre Booking Master Name Screen



Information filled in the Master Name will carry to all new bookings and pre-bookings. This means that filling info in here will automatically fill in fields later. For more detailed information on creating and filling in a new Master Name, see *Creating a New Master Name* on page 52. Make sure to fill in the following fields at a *minimum*:

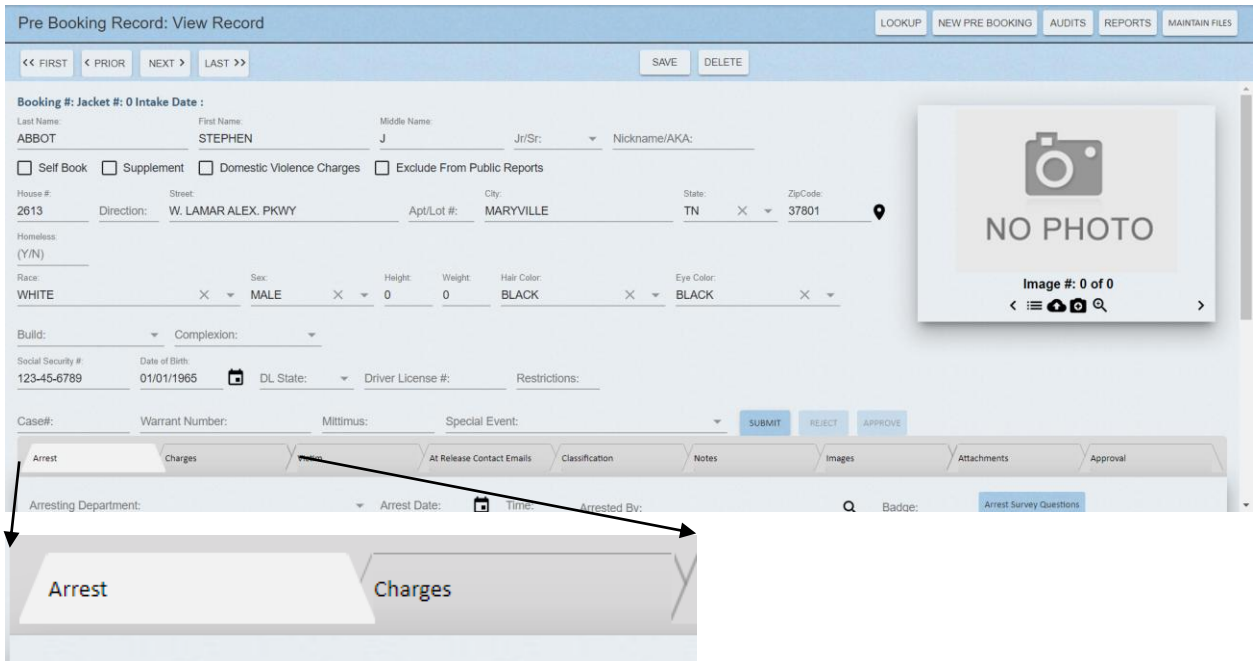
- Name (Last & First)
- Race & Sex
- Height & Weight
- Description (Hair, Eye, Build, Complexion, facial hair and glasses if applicable)
- Social Security # and Date of Birth (or estimated age if necessary)
- Driver License # (or other applicable ID)

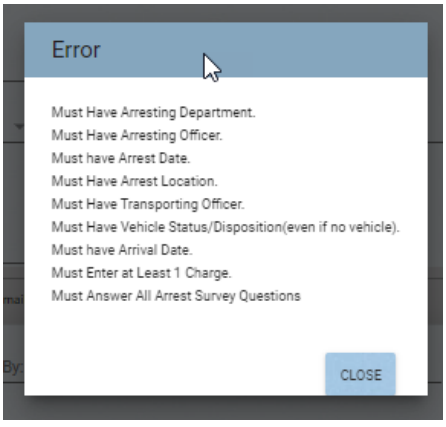
Afterwards, you can click the **"Save & Create PreBooking Record"** in the upper left.



Filling in the Arrest and Charges Tab

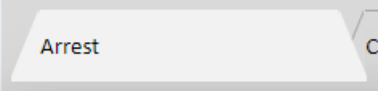
Now that you have clicked *Create Prebooking Record, t*he Master Name information will fill in on the pre-booking record. The **Arrest Tab** and the **Charges Tab** must be filled in before the pre-booking record can be submitted for approval.





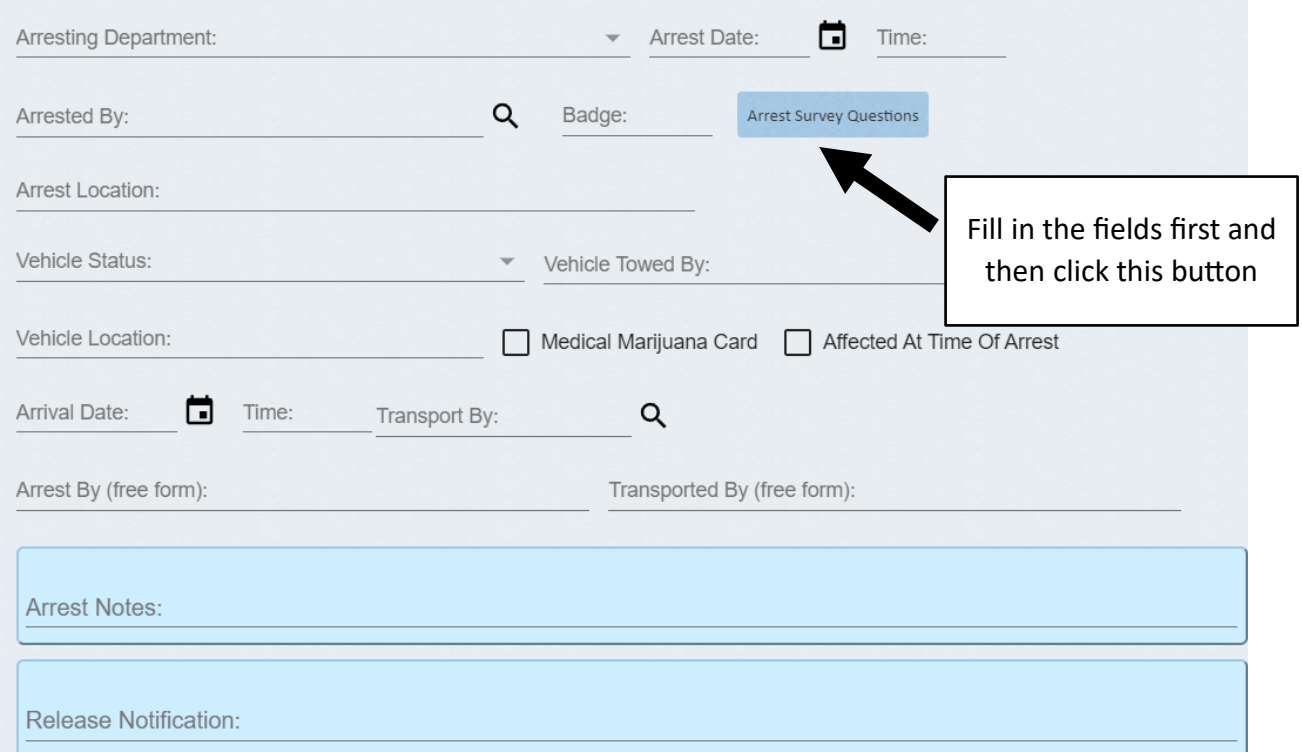
WARNING: You **must** fill out the arrest and charge tabs, or iSOMS will not allow you to continue the Pre-Booking process. If those tabs are not filled in, you will get an error message telling you what must be filled in.

Arrest Tab

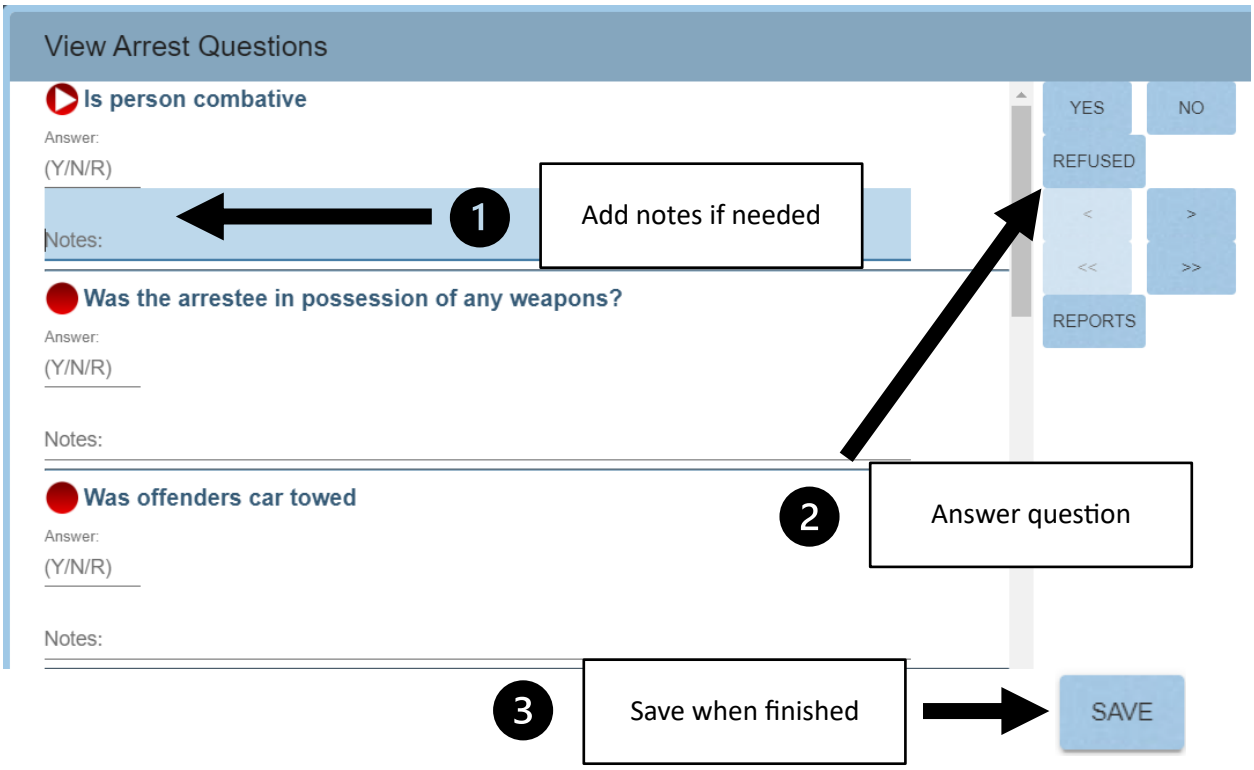


The **Arrest** tab stores information on the arrest of the individual. On the **Arrest** Tab, the following fields must be filled in:

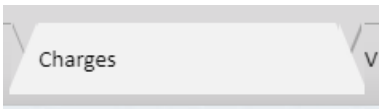
- Arresting Department
- Arresting Officer
- Arrest Date
- Arrest Location
- Transporting Officer
- Vehicle Status (even if no vehicle)
- Arrival date



The "**Arrest Survey Questions**" must also be filled in. Record any info you think is relevant and then click **Yes, No,** or **Refused** as appropriate to fill out the questions. When finished, click **Save** at the bottom of the window. See the next page for a screenshot of the window.



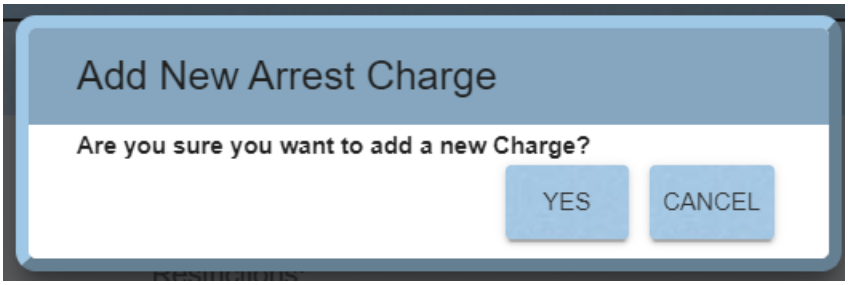
Charges Tab



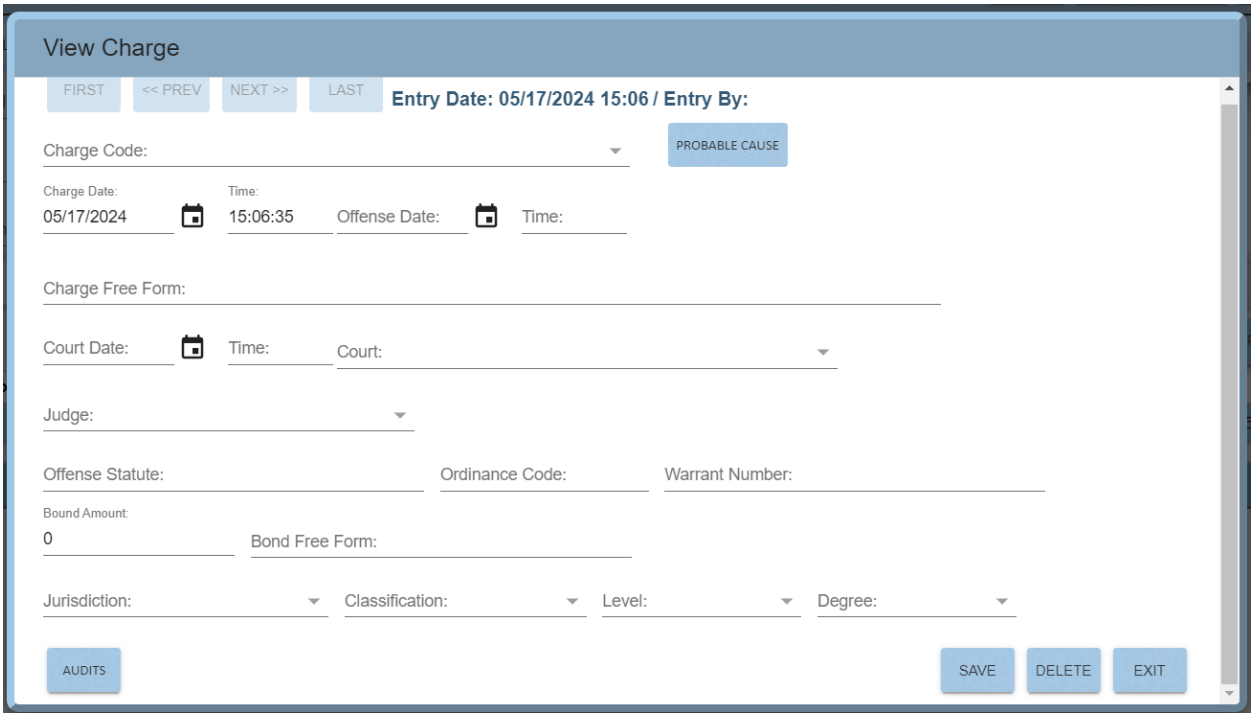
The **Charges** tab lists charges for this pre-booking. Use the **"Add Charge"** button to add a new charge. You must add at least one charge.



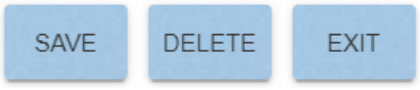
Click "**Yes**" when asked if you are sure you want to add a charge:



Add the charge information on the pop up screen. You should add all parts of the charge that you can, including the offense date and time.



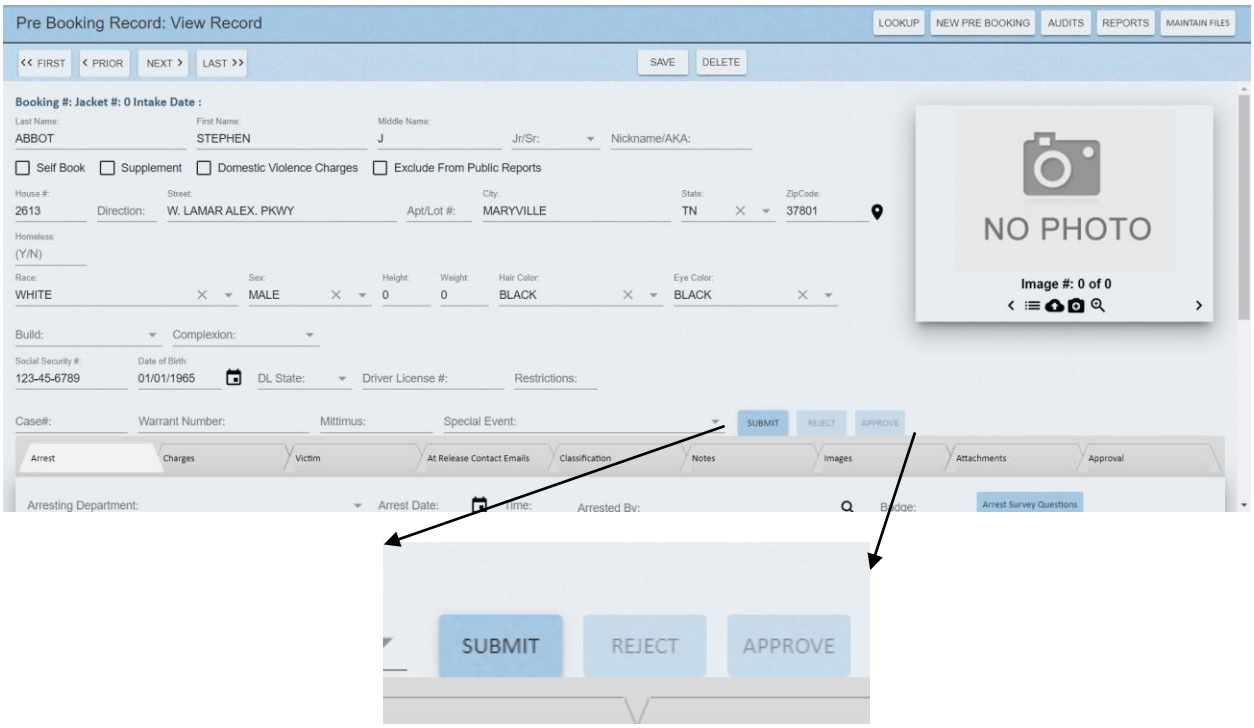
When finished, click "**Save**," then "**Exit**" in the bottom right corner of the screen.



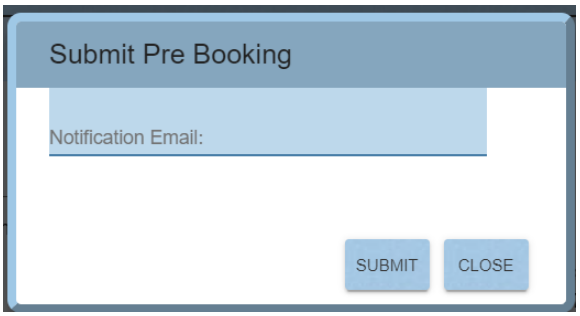
Submitting Pre Bookings

You only have to fill in some of the fields and the first two tabs. Additional information can *optionally* be filled out in the other tabs: see *Filling Out Additional Information* on page 31 for more info on those tabs. You do not have to use those tabs, but you can fill them in if you would like to add extra info.

Once all the desired information for the pre-booking record is filled in, click "**Submit**."



You will get a pop up window where you will add an employee's email. This should be the supervisor who will approve the Pre Booking record. Once you have entered the email, click "**Submit**."

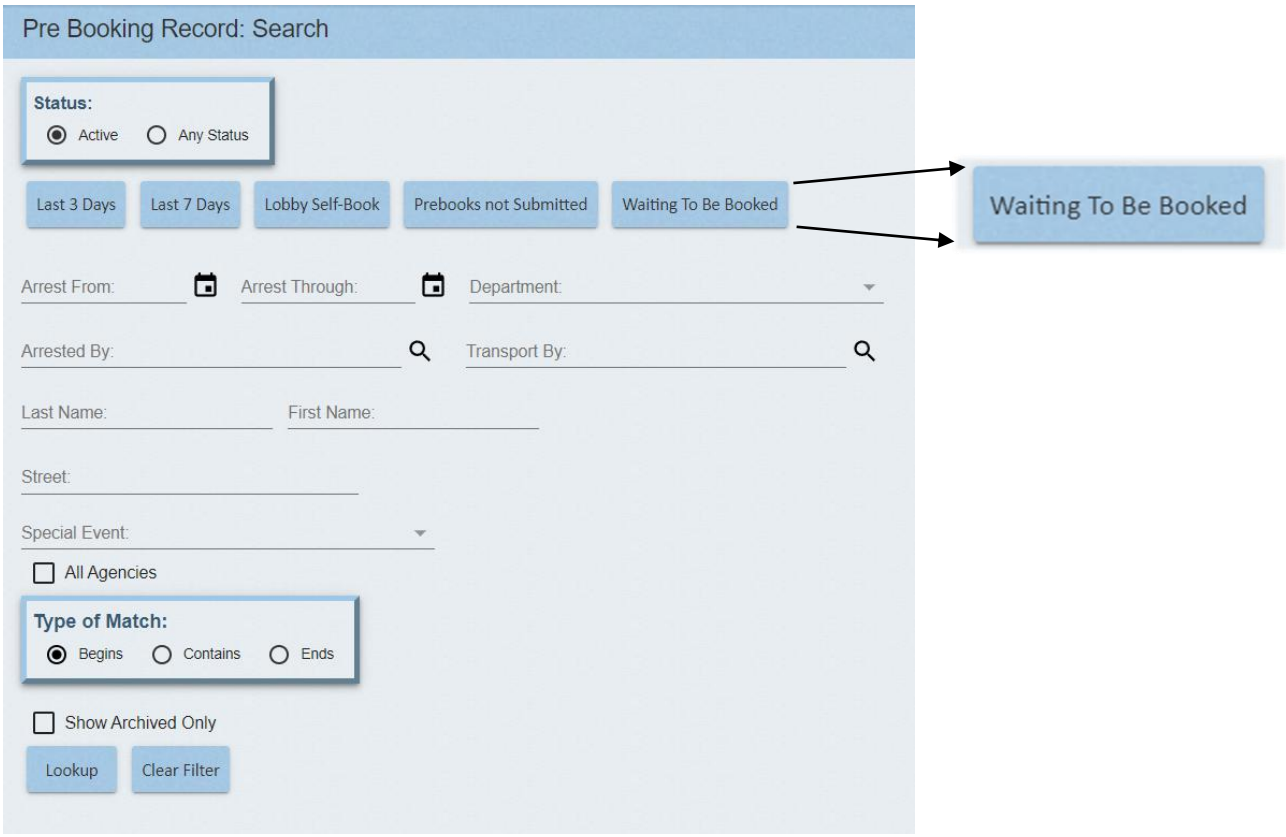


WARNING: If you do not enter an email, iSOMS will **not** allow you to submit the record. If possible, use the supervisor's email. If necessary, you may use another email, but the supervisor will still have to approve the Pre Booking either way.

After being submitted, the "**Reject**" and "**Approve**" buttons will be available if the person doing the report has the security clearance to approve a Pre Booking record.



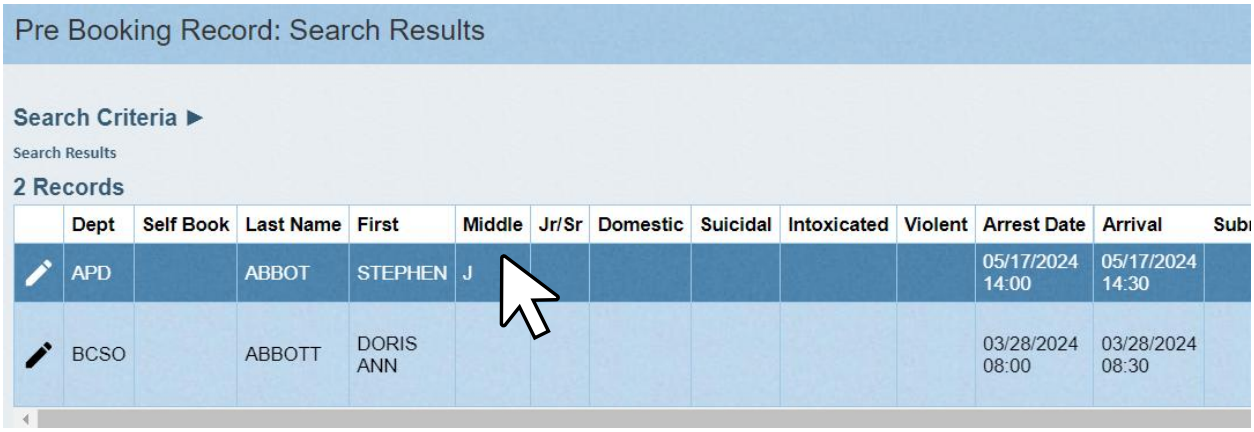
The Pre Booking record will also now be available in the Pre Booking record search results by using the "**Waiting To Be Booked**" button.



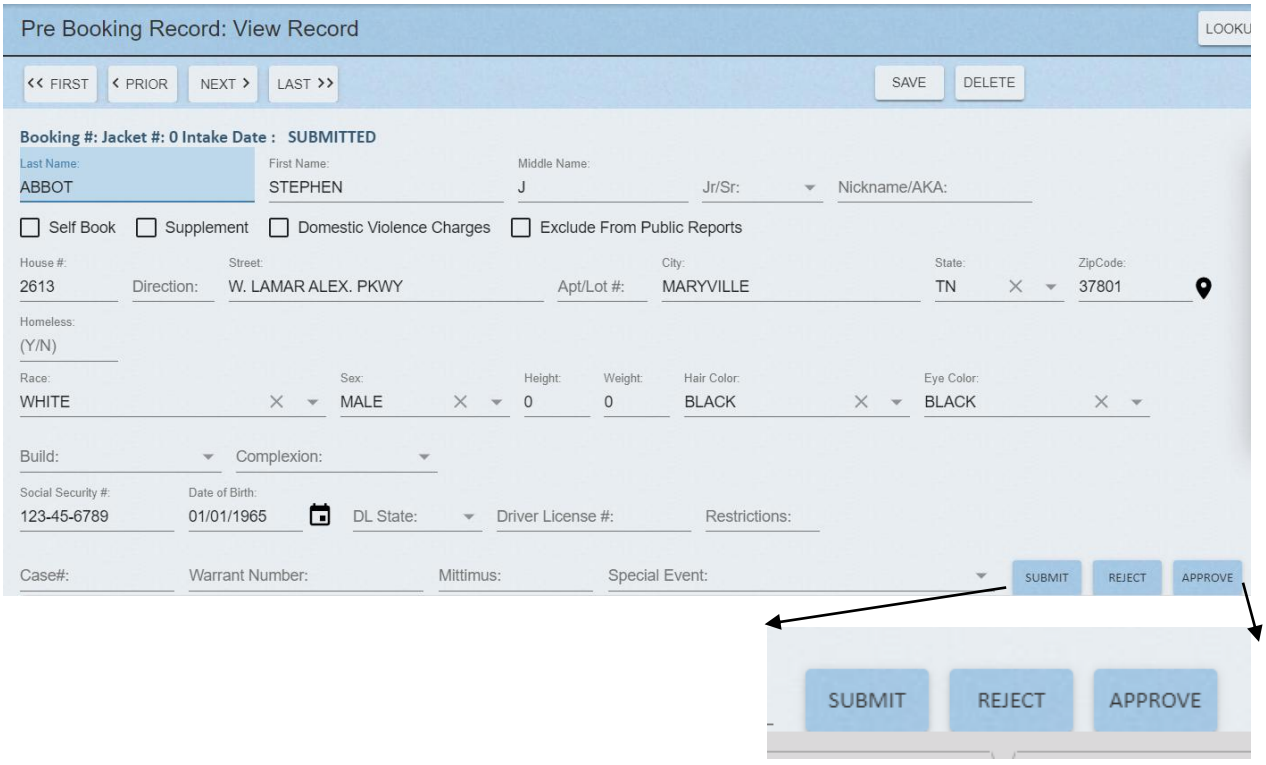
Approving Pre-bookings

The supervisor who is on duty can click on the record and approve the record if all the required information has been filled in. After this the record will be available in Intake/Booking Records for a booking officer to open and complete.

Click the record you wish to approve:



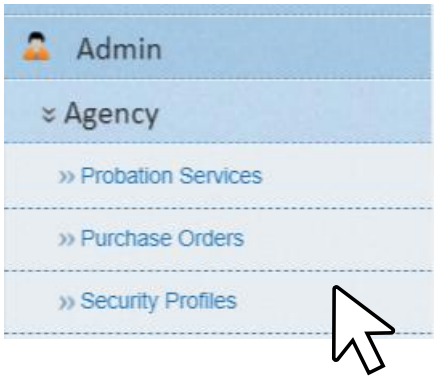
Then click the "Approve" button to approve it.



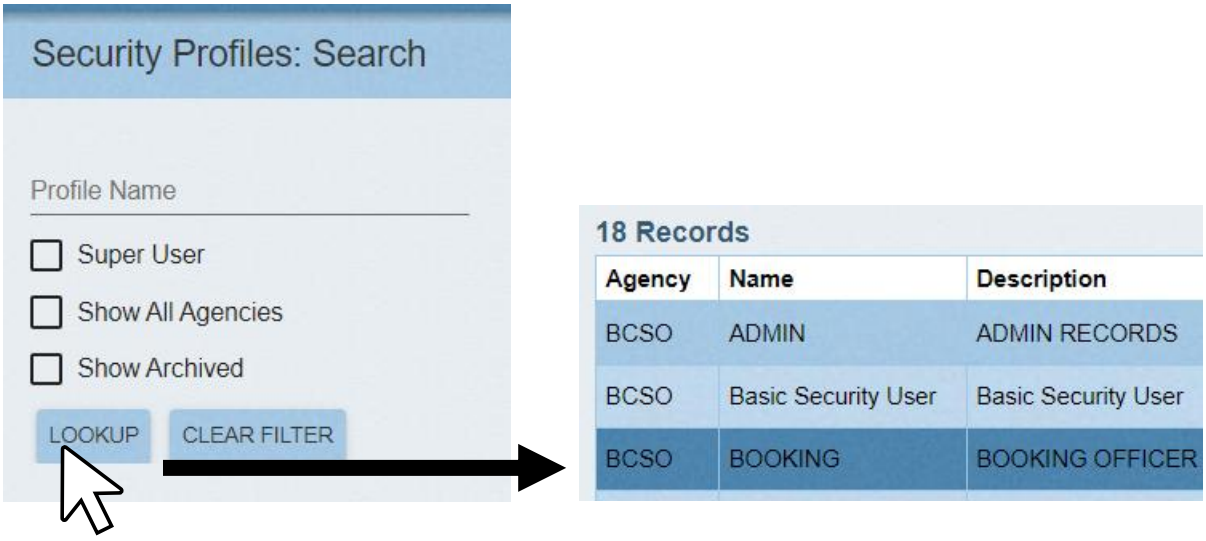
Security Permissions for Pre-booking

In order to approve pre-bookings, the security profile a user is using must have the proper permissions. To begin adding permissions to a security profile, a Superuser can navigate on the home screen menu to:

Admin → Agency → Security Profiles



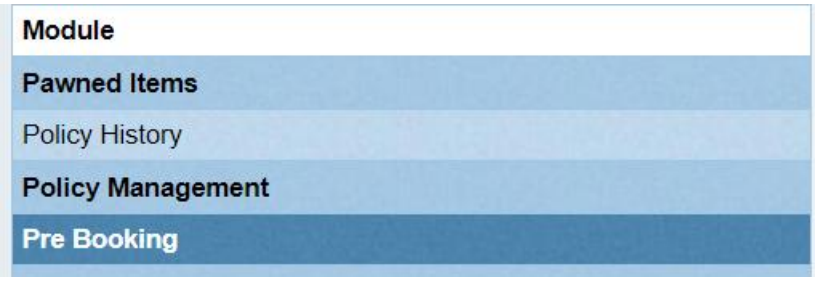
This will open the security profiles search screen. Click **Lookup** and double-click the security profile you want to edit:

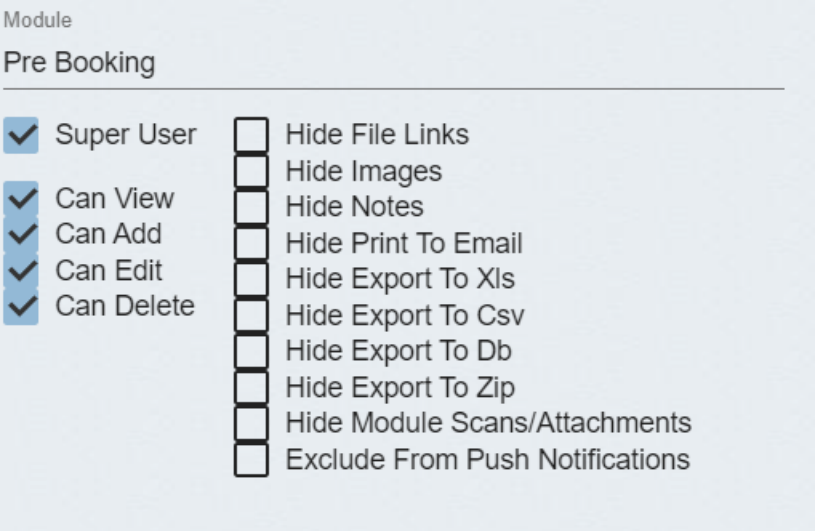


Click on the **Module Permissions** button on the following screen:



This will open a long list of module permissions. You will want to scroll down until you find the *Pre Booking Entry.* Enable the *Super User* checkbox as well as *Can View/Add/Edit/Delete.* Only do this for security profiles that you want to be able to approve / delete pre-bookings. After adding those permissions, users with that profile will be able to approve or reject pre-bookings.





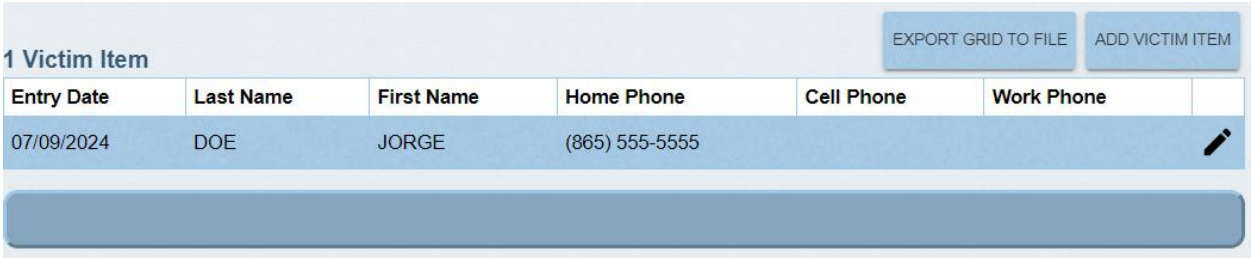
Filling in Additional Info

Only the first two tabs in pre-booking are required, but there are some more tabs available if you would like to add more details to the pre-booking.

Victim Tab

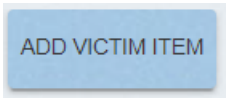


The **Victim** tab allows you to list victims for this pre-booking. To view a current entry, double-click it.

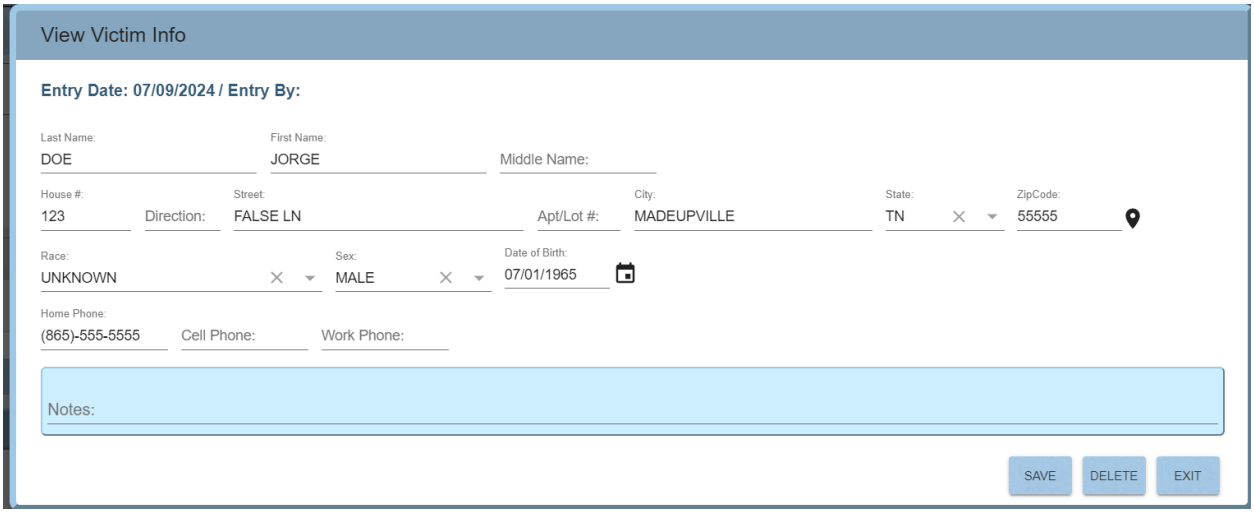


Adding a New Victim Entry

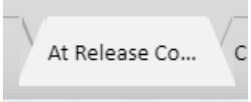
Click **Add Victim Item** to add a new entry.



Here you can list the victim's information. Add **Name, Address,** and **Identifying Info** and click **Save** when finished.



At Release Contact Emails Tab



The **At Release Contact Emails** tab allows you to add emails for reference to notify when the inmate being booked is released, such as victims or officers. To view or edit a current entry, double-click it on the table.

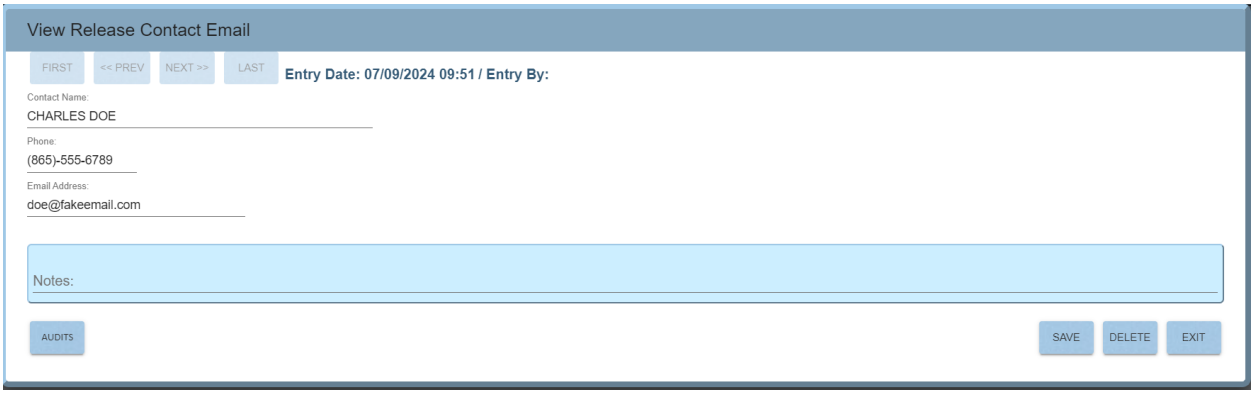


Adding a New Release Contact Email

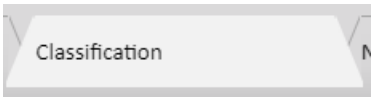
Click the **Add Release Contact Email** button to add a new contact email:



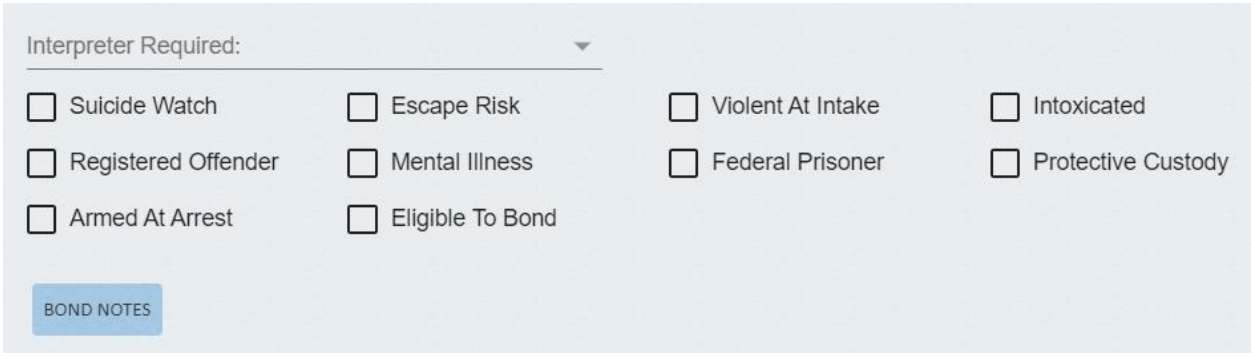
Fill in the **Name, Phone,** and **Email,** then add any pertinent notes. Click **Save** when finished.



Classification Tab



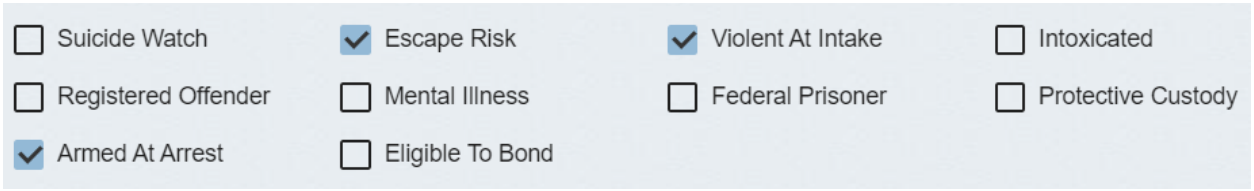
The **Classification** tab allows you to mark certain things about an inmate, their arrest, or intake.



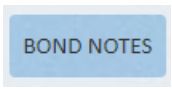
Add **Interpreter Required** in the dropdown menu if the inmate needs an interpreter to communicate.

Check any of the checkboxes below if one of the classifications apply, i.e. armed at arrest, escape risk, violent intake, etc. Some of these will add a warning at the top of the record when loaded, such as *Violent at Intake*.





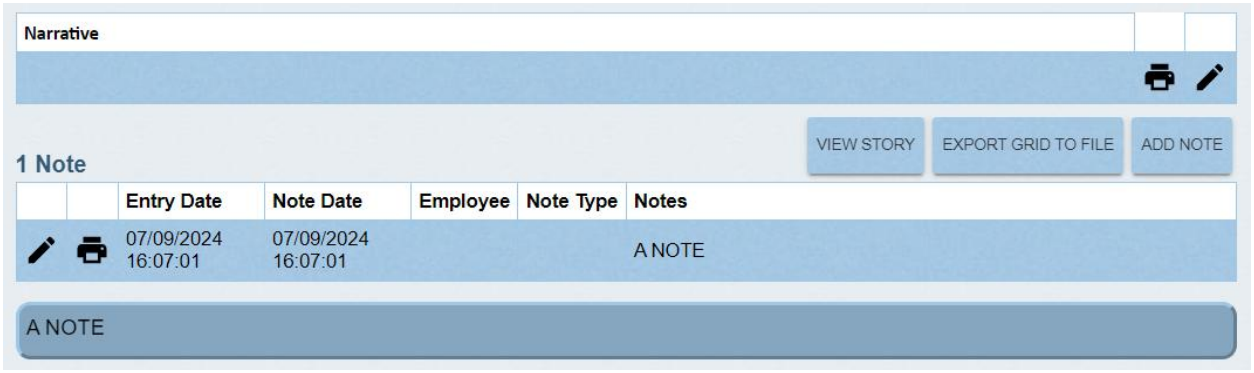
Add any relevant notes pertaining to the bond, if applicable, in **Bond Notes,** and when finished, click **Save** at the top of the screen to save the pre-booking.



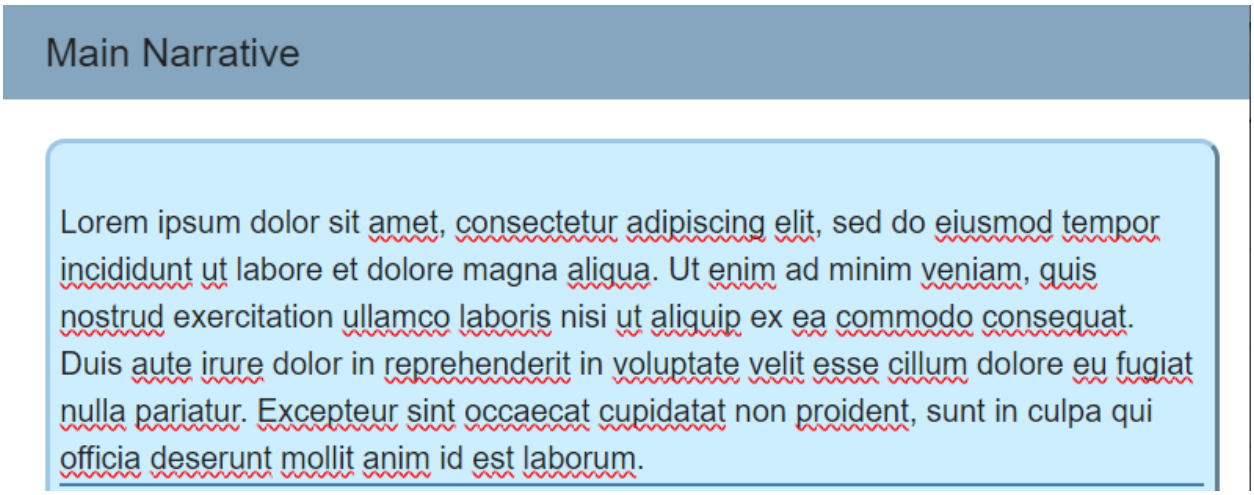
Notes Tab



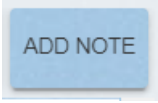
The **Notes** tab is used to view or add notes pertinent to the booking. Double-click on any entry in the table to edit or view it.

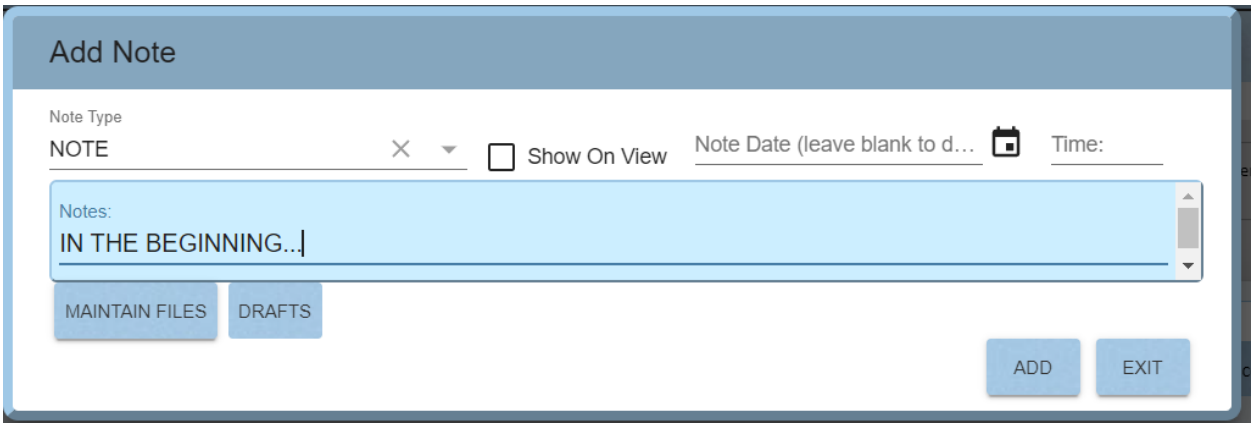


Narrative acts as an area where you can add a long note. This is useful when you want to add important or long form notes that won't be mixed in with the rest of the short notes.



Use **Add Note** to add a new note.



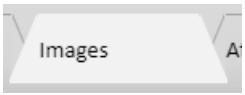


The **View Story** button will show all notes (except Narrative) that have been added on one page.





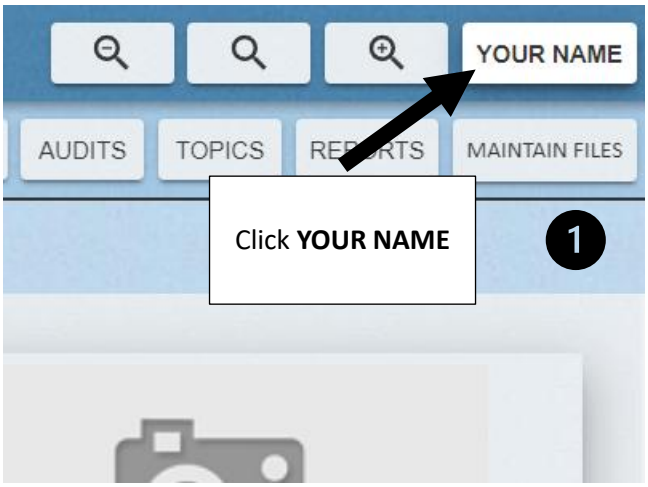
Images Tab

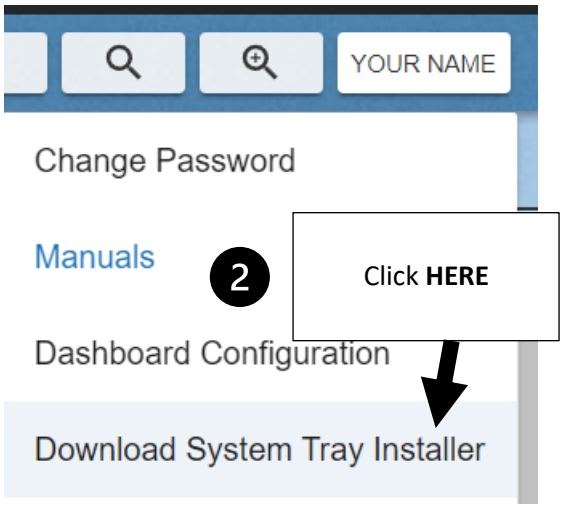


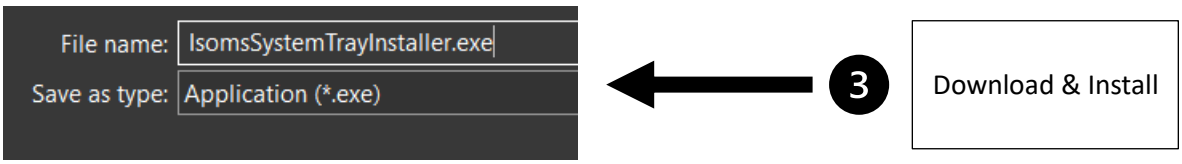
The **Images** tab is used to view, download, or add images. These images are normally for identifying or medical information, such as images of specific features of the inmates such as tattoos, piercings, or injuries. You can add a single image at a time or multiple images at a time. Click **Add Image** to add a single image.



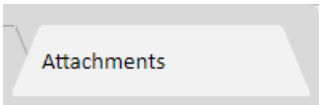
To add multiple images at a time, you will need the System Tray Installer downloaded to the computer you are using. The System Tray Installer can be found on the iSOMS home page by clicking on the button in the upper right with your username. Once you click on that, you will get a drop-down list, and **Download System Tray Installer** is one of the options. Download and install it on this computer.



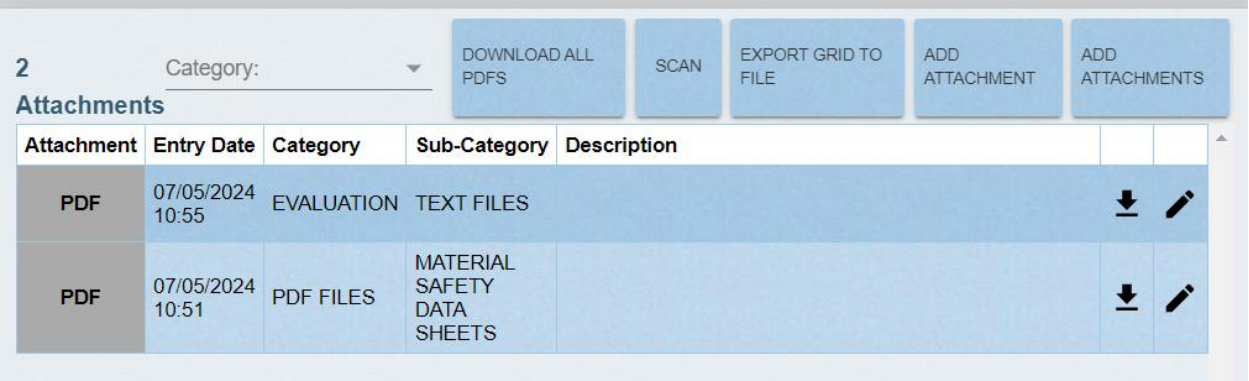




After you have the System Tray Installer on the computer, you can now use the **Add Images** button to upload multiple images at once if necessary.

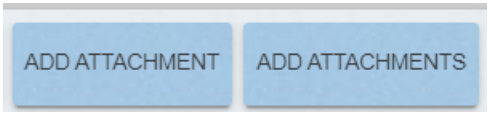


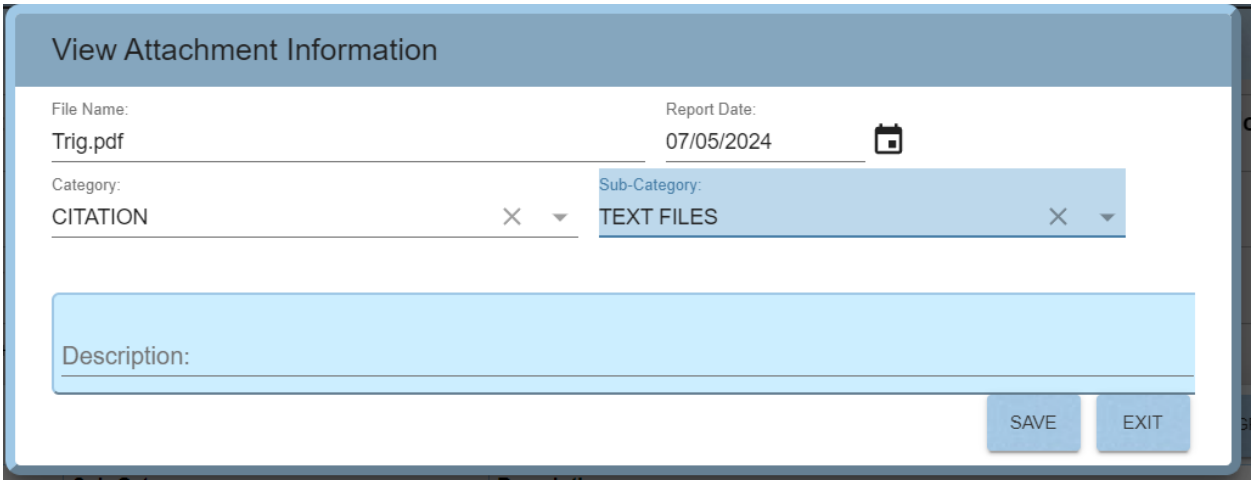
The **Attachments** tab is used to view, download, or add attachments, such as other files besides images associated with an inmate. Double-click a file entry to view the record for the attachment or click on the icon to download the attachment to the computer.



You can add a single attachment at a time or multiple attachments at a time. Just like above with images, you will need the System Tray Installer downloaded to the computer you are using to add multiple attachments at once. See the *Image* tab instructions on the previous page for instructions on installing the System Tray Installer.

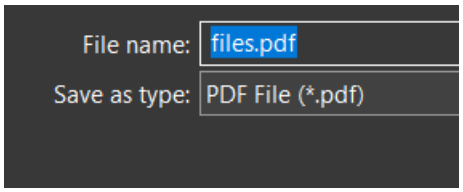
Click **Add Attachment** to add a single attachment or click **Add Attachments** to add multiple attachments at the same time. Choose the attachments from the computer, then add the appropriate category and sub-category for the file.



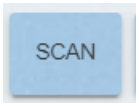


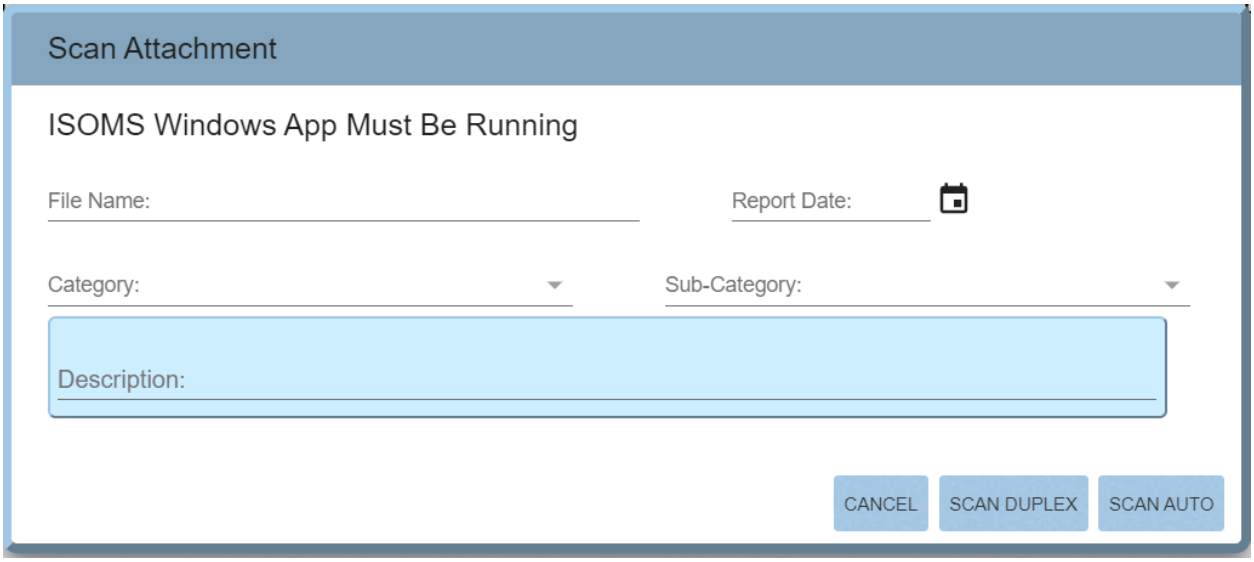
You can also **Download All PDFs** at once by clicking the appropriate button.





If you have the iSOMS Windows App, you can use **Scan** to scan files into the attachments.

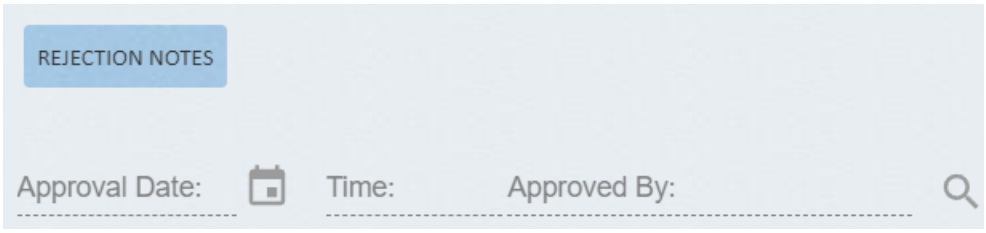




Approval Tab



The **Approval Tab** is simply an information tab that details approval or reason for rejection. **Rejection Notes** can be used to record why a pre-booking was rejected. If approved, the approval date and time can be viewed for the pre-booking on this tab as well.



Importing Offender Information from an Incident Report

Purpose and Overview

Like Pre-booking, importing from incident reports allows some of the information for the booking to be available ahead of time. Offender information can be imported from any arrests made in the last 48 hours. This method takes the incident report and creates a booking report out of the information from the incident report. Take the following into account when deciding whether to use this or another option:

- Importing from incident reports can save some time for the booking officer since the patrol officer is already putting the information in the incident report. The booking officer will have some information already entered when they start the booking.



IMPORTANT: The booking officer will still have some work to do. Importing from incidents reduces the amount of work for them, but it does not complete the full booking process.

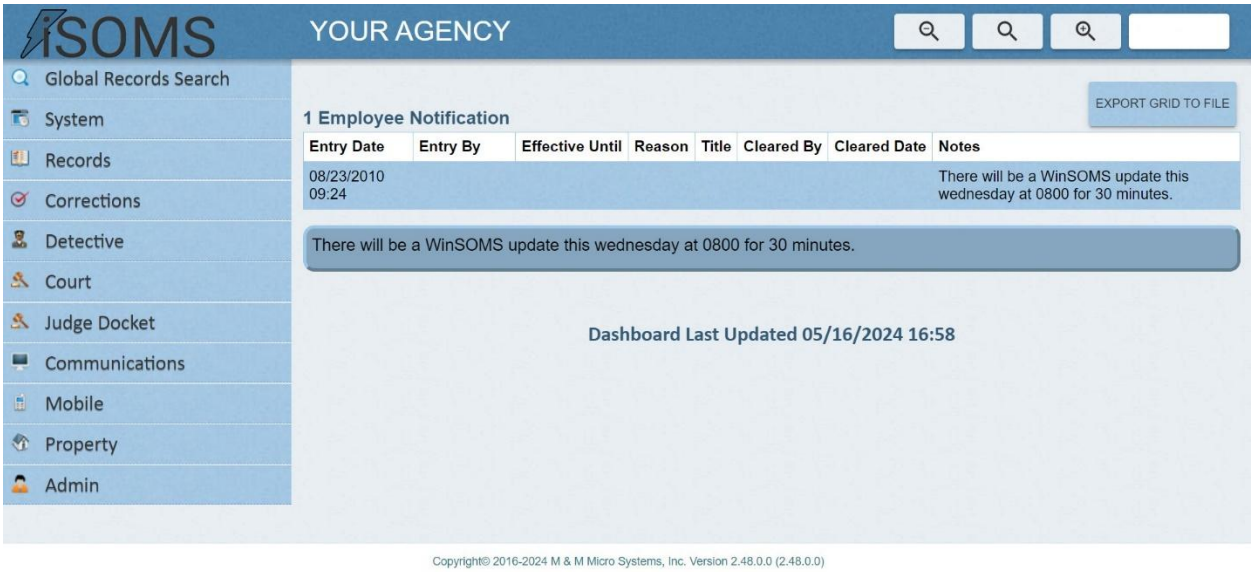
- Importing from incident reports reduces the chance of miscommunication. The information will be put into the computer directly, hopefully with reduced chance of any misunderstandings.

- When considering importing from incident reports, realize this means an officer will have to import the report *after* they finish the incident report. This increases the time needed filling in forms, but unlike pre-booking, they will not have to enter it twice. Consider whether you prefer the pre-booking or incident report import method, or if you will use only standard booking.

- Importing from the incident report must be done before the booking, but many agencies have their officers write their incident reports after booking. This does increase the time between when officers arrive with a prisoner and when the prisoner is booked. If the officers must book the prisoner before having access to a computer or before filling out incident reports, you may consider doing only standard booking instead.

Creating a Booking Record from Importing an Incident

To begin a booking record by importing the offender information, begin on the iSOMS home screen.



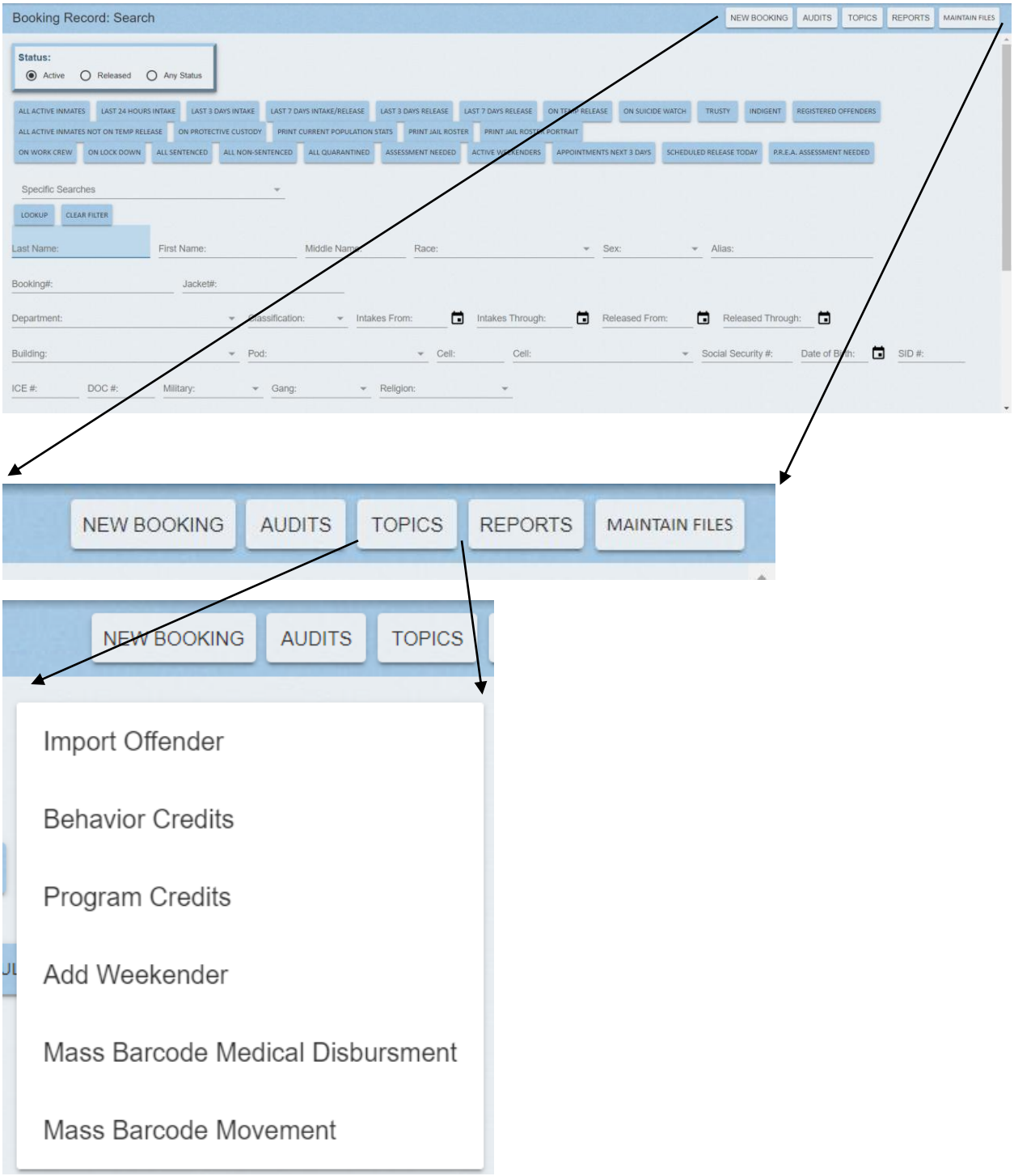
Navigate to:

Corrections → Booking → Intake/Booking Records



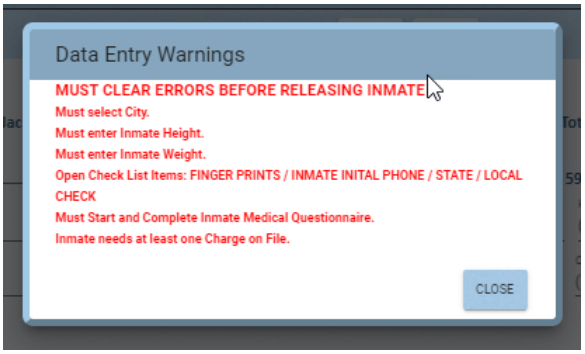


This will bring you to the **Booking Record Search Screen**. In the top right click on "**Topics**" and then "Import Offender" from the dropdown menu.



Release Warning

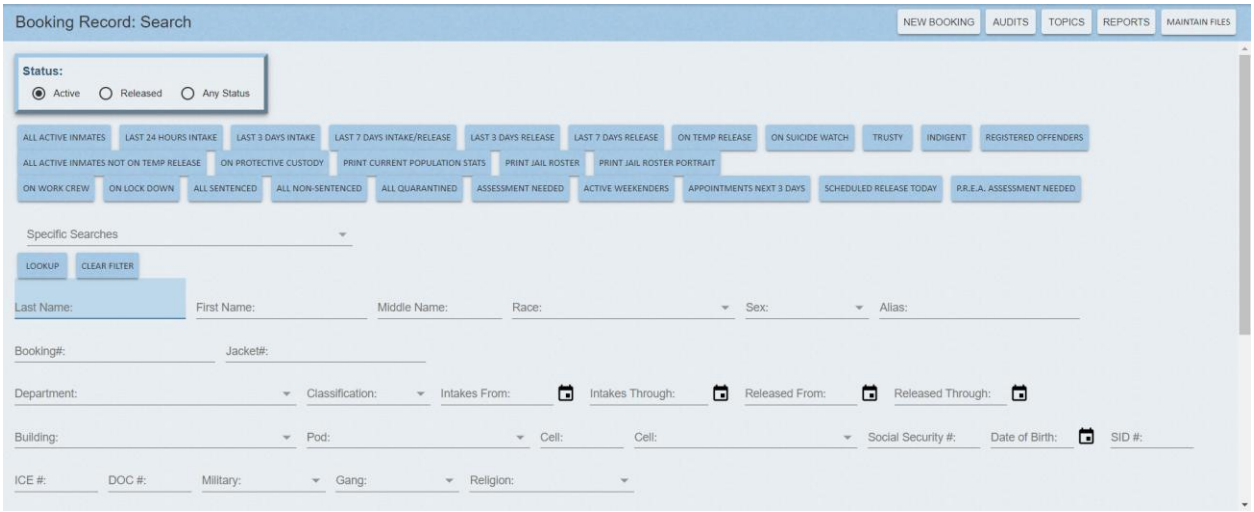
The next screen is the booking record. Click "**Save**" to save the record. Because not much information has been filled in an error message will pop up. These do not need to be fixed to create the booking record. This is just a warning of things that need to be done before the inmate is released. Just click "**Close**" and continue with the record. At this point, the rest of the process is like creating a new booking from scratch.



Booking Search Screen

Before looking at the standard booking process, we will take a quick look at the Booking Search Screen. This screen allows you to search for bookings that have already been created. The screen has two main sections:

1. **Quick searches** using the blue buttons near the top of the search screen.
2. **Regular Searches** using the fields and clicking "**Lookup"**



Quick Searches

As stated before, the blue buttons on top of the search screen allow you to do quick searches. There are several buttons such as All Active Inmates, Last 24 Hours Intake, Last 3 days Intake, On Temp Release, On Suicide Watch, Assessment Needed, Release Today, and many others that will give you quick access to information you need. Let's look at the search function of each of the buttons.



ALL ACTIVE INMATES: This lets you search for all active inmates in the booking records.

LAST 24 HOURS INTAKE / LAST 3 DAYS INTAKE: This searches all inmates booked in the last 24 hours or in the last 3 days, respectively.

LAST 7 DAYS INTAKE/RELEASE: This lets you see the records for all inmates taken in and/or released in the past 7 days.



LAST 3 DAYS RELEASE/LAST 7 DAYS RELEASE: Search for all inmates that were released in the last 3 or last 7 days.

ON TEMP RELEASE: Search for inmates that have been temporarily released.

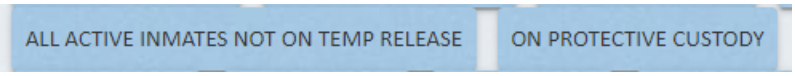
ON SUICIDE WATCH: Search for all inmates marked for suicide watch.



TRUSTY: Search for all inmates marked with **trusty** status (typically work outside cell).

INDIGENT: Search for all inmates marked **indigent** - inmates with minimal or no resources. This may have a specific definition in your state or agency.

REGISTERED OFFENDERS: Show all inmates that are registered sex offenders.



ALL ACTIVE INMATES NOT ON TEMP RELEASE: Find all *active* inmates that are *not* on temporary release.

ON PROTECTIVE CUSTODY: Find all booking records marked for protective custody.



These three buttons do not search records but rather create documents you can view or print that have information about the booking records.

PRINT CURRENT POPULATION STATS: Print a document with information on the age, race, sex, and other statistics of the current inmate population.

PRINT JAIL ROSTER/PRINT JAIL ROSTER PORTRAIT: Both the "**Jail Roster**" and "**Jail Roster Portrait**" buttons print a report with compact entries on each inmate that is not on release. The information on both will be the same, but "**Jail Roster**" is in landscape orientation for printing, while "**Jail Roster Portrait**" is in portrait orientation.

TIP: Use these printing buttons to get more information about all inmates in general or as a quick overview of each inmate.



ON WORK CREW: Find all inmates that are marked for work crew.

ON LOCK DOWN: Find all inmates that are marked as on lock down.

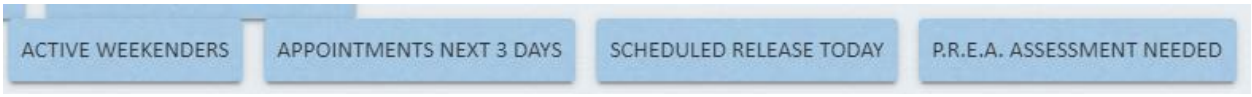


ALL SENTENCED: Find all inmates that have been sentenced.

ALL NON-SENTENCED: Find all inmates that have **not** been sentenced.

ALL QUARANTINED: Find all inmates that have been quarantined.

ASSESSMENT NEEDED: Find inmates that need an assessment. (Note that this is separate from P.R.E.A assessments, although a given inmate could need or be marked for both.)





ACTIVE WEEKENDERS: Find inmates that marked as active weekenders (inmates that only ser

APPOINTMENTS NEXT 3 DAYS: Find inmates with appointments scheduled within the next three days.

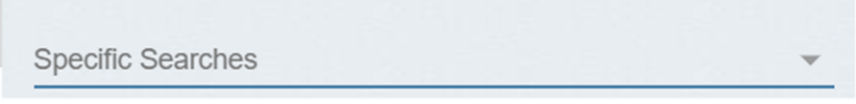
SCHEDULED RELEASE TODAY: Find inmates scheduled for release today.

P.R.E.A. ASSESSMENT NEEDED: Find inmates that need a P.R.E.A. assessment.

HERE ILLEGALLY: Find inmates that are marked as here illegally.

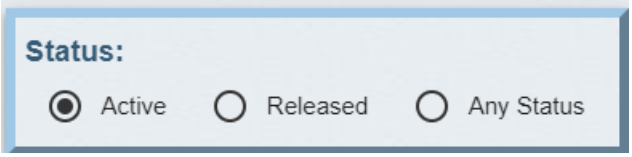


TIP: Use the **Specific Searches** underneath the quick search buttons to do a few more searches for booking entries that are missing important info, such as records missing cell designations or classifications.



Regular Searches

Using the fields provided, you can also search for a specific booking entry or set of entries by filling in fields to narrow the search. You can search using information such as Last Name or Driver's License Number. You can also choose statuses by clicking on the **radio buttons** in the status box at the top of the screen if you are looking for inmates with a specific status.



At the bottom of the screen, you may choose the type of match when you enter information into the fields to narrow your search.



Checking the **All Agencies** box will show returns from all agencies associated with yours. The **Show Archived Only** box will only be available to Super Users and, if checked, will show any deleted booking records.

TIP: Super Users (such as supervisors) can use **Show Archived Only** to find a booking record if it was accidently deleted or archived. Using this box will help you to find and restore the record if you are a Super User.

Standard Booking Process

Purpose and Overview

In this section, we will cover the standard booking process, including continuing a booking entry created from pre-booking or importing an incident report. For information on continuing the process, please see **Filling in the Booking Record** on page 60. If you choose not to have officers perform one of the two preparatory methods (pre-booking or importing incidents), then the booking officer will have to start the booking process.

If you are trying to decide how to do booking, consider the following about using the preparatory methods or the standard method:

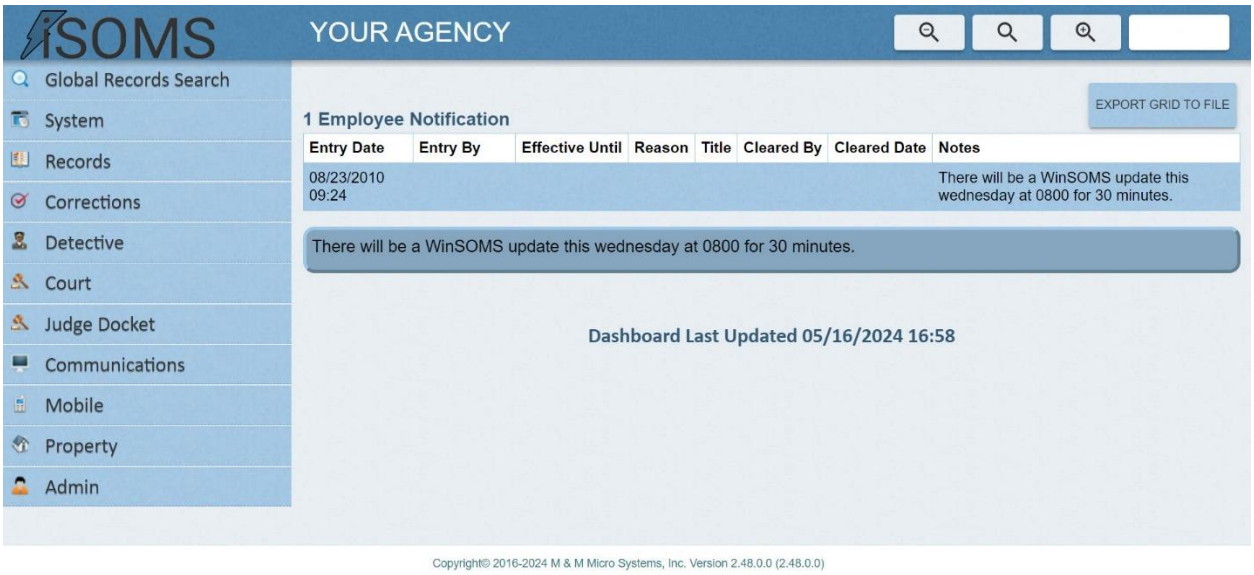
- Standard booking means the booking officer does not have to wait on the arresting officer to fill out information on the computer. This may be more helpful with getting the person booked quicker overall.

- Standard booking may be easier as you may only have to teach each booking officer how to work with the booking records. This may reduce the number of people who must learn this part of iSOMS. You should consider the preliminary methods and decide what works best for your agency concerning this.

- Standard booking is more work for the booking officer and all information must be coordinated with the arresting officer to ensure that the information is accurate. Consider these different facets of each method to decide which way to create new booking records.

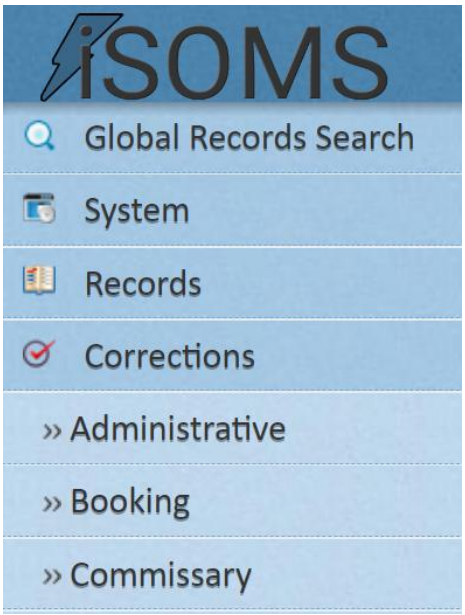
Creating a New Booking Record

To create a new booking record from scratch, begin on the iSOMS home screen.



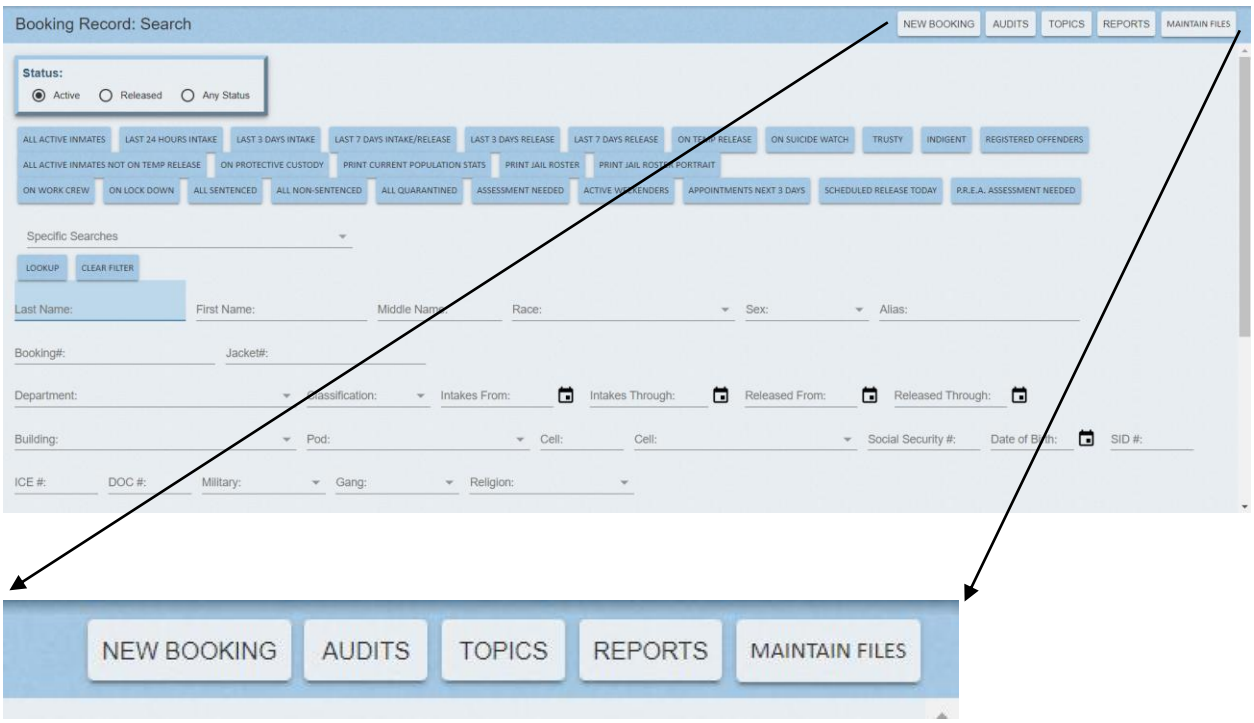
Navigate to:

Corrections → Booking → Intake/Booking Records

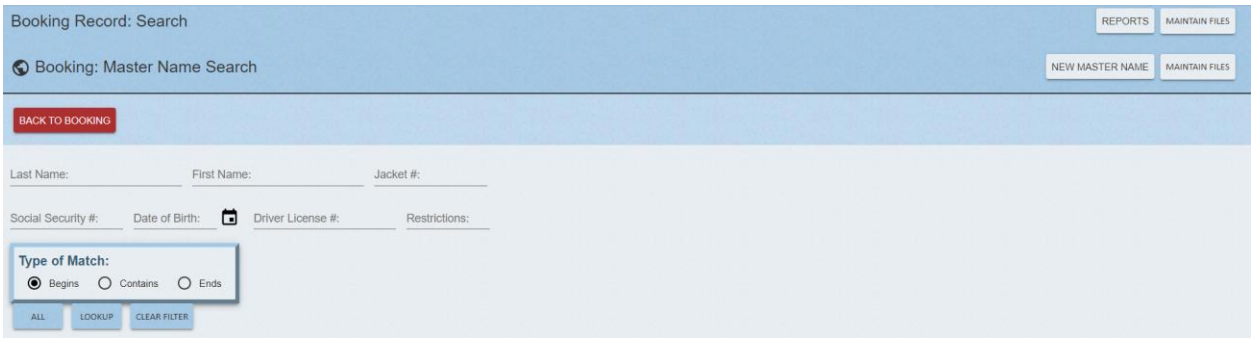




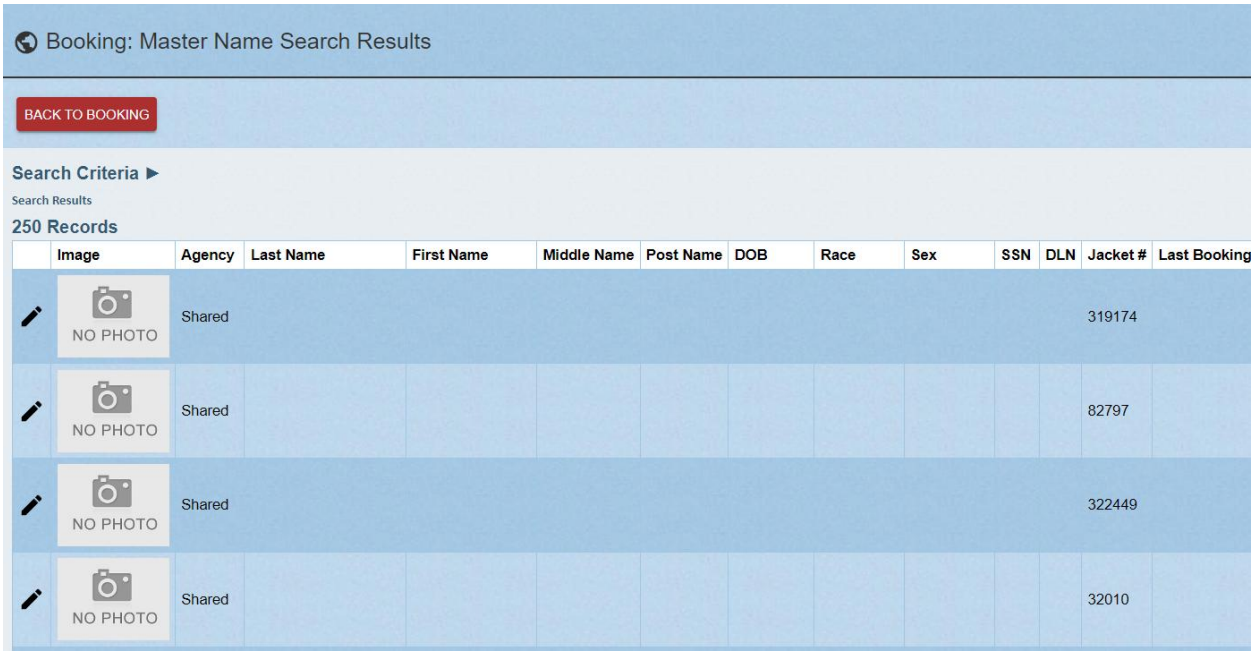
This will bring you to the **Booking Record Search Screen**. Click on **"New Booking"** in the upper right.



When you click on **New Booking** the following screen is the *Master Name Search* screen. This screen allows you to either find someone's name in the Master Name records or enter a new name. You need to use an existing Master Name or create a new Master Name if you want to create a new booking record.



If the person being booked in already has a record in your system, you can enter information to narrow the search and click "**Lookup.**" Clicking **"All"** will show all Master Names in your system. If you are searching for a Master Name, once you enter any information to narrow the search and click "**Lookup,**" the next screen will show any results that matched your search, and you can choose the Master Name by clicking on it twice.



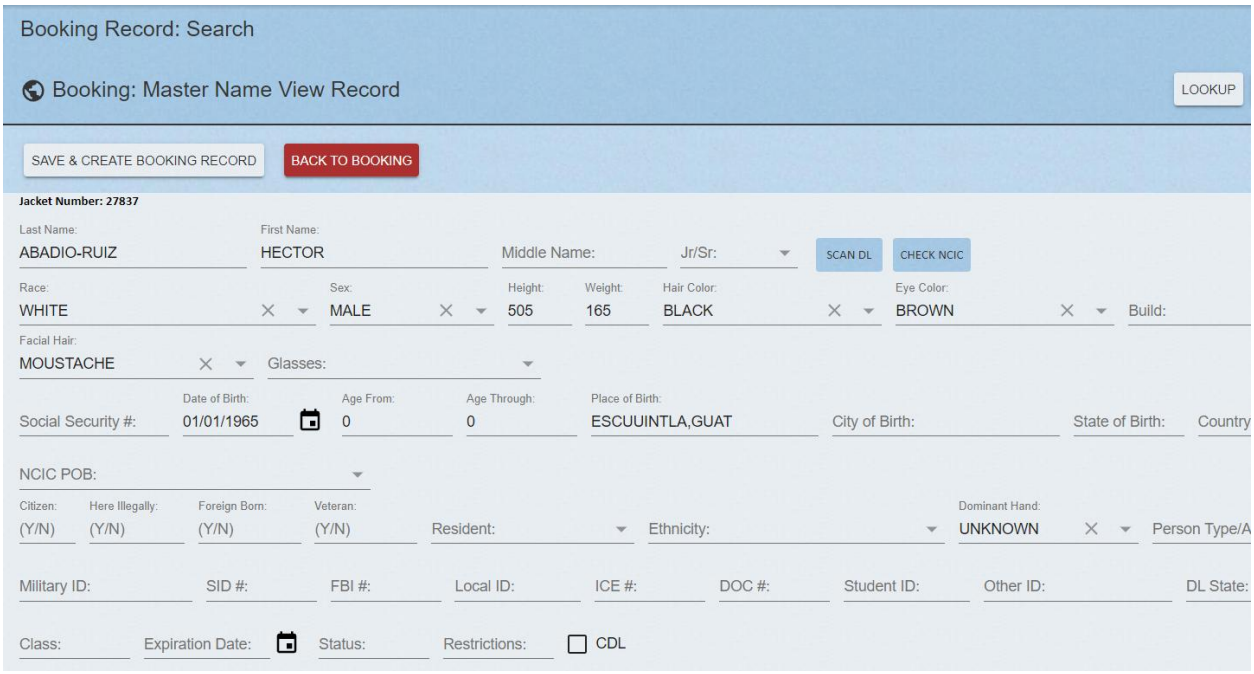
If the person you are booking has no Master Name in the database, you need to create a new one by clicking **"New Master Name"** in the upper right. (See **Creating a New Master Name** below on page 52.)



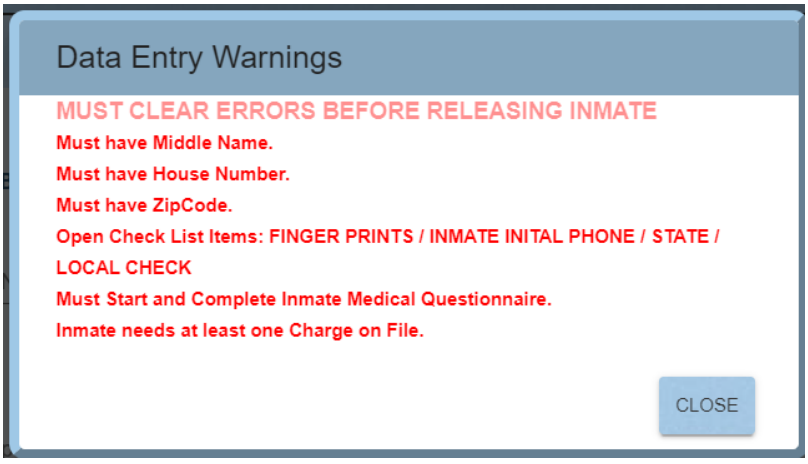
IMPORTANT: Make sure to confirm the Master Name is the same as the person you are entering. Use at least two pieces of information, such as DL # and birth date, to verify their identity.



Once you double click the row with the correct name, the Master Name will appear and fill in information for you. Click **“Save & Create Booking Record”** at the top of the screen to begin the booking record.

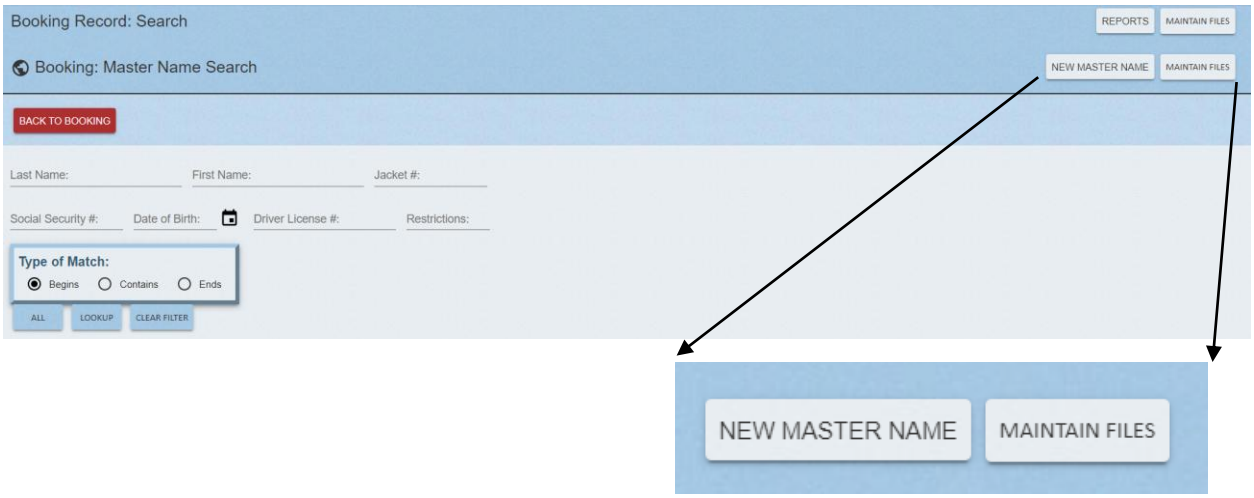


Because you have not entered much information yet, you will get a data entry warning. As you fill in the record, you should get fewer warnings. Some of these warnings are for information that needs to be entered before the inmate’s release.

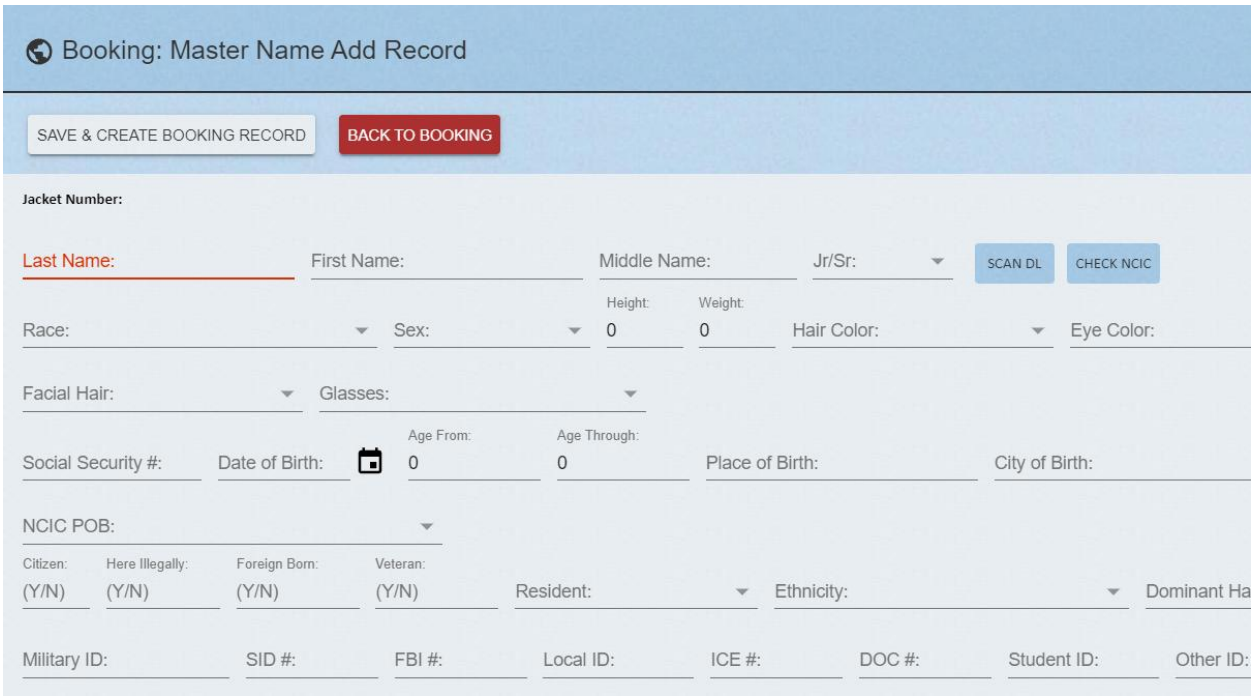


Creating A New Master Name

If the person you are booking in is not already in your system, a new Master Name will need to be created. From the Booking Search Screen, click on New Master Name in the upper right hand corner.



On the following screen, fill in as many fields as possible. (See next page)



Filling Out Master Name Fields

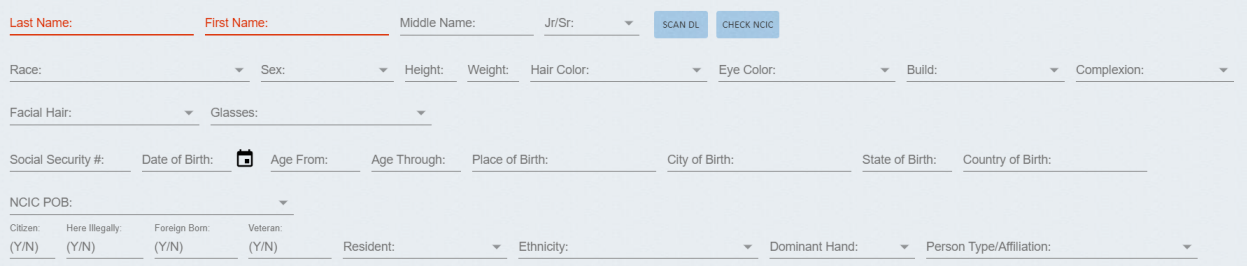
iSOMS has numerous fields to provide proper records on inmates and individuals, but the minimum information that should be filled in is:

- First and last name
- Date of birth
- Social security number (SSN)
- Driver's license information [if they have one]
- Sex
- Race
- Ethnicity.

NOTE: The iSOMS app can be used to scan the driver's license if you have it.

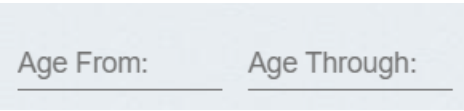
It is **recommended** to fill out the Employer and Bio/ID headings to reduce the amount of work for later when making a new booking.

Biographical

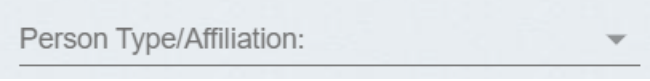


These fields are for name, descriptive aspects, social security number, age, place of birth, and so on. Filling these out will ensure the info is copied into the booking records every time the Master Name is used later.

Clarifications:

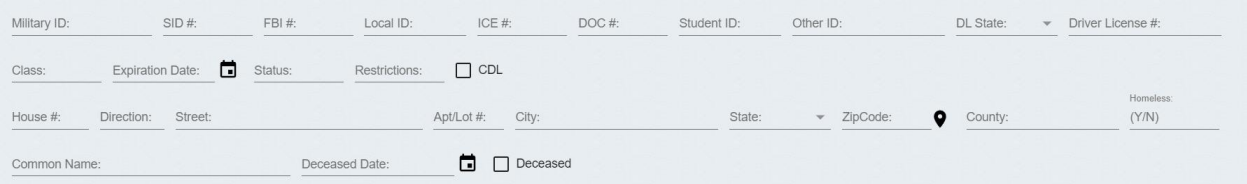


Age From and **Age Through** allows you to estimate the age of a person who does not have a known birthdate.



Person Type/Affiliation lets you mark this individual as a diplomat, juvenile, foreign citizen, military, etc.

ID and Address



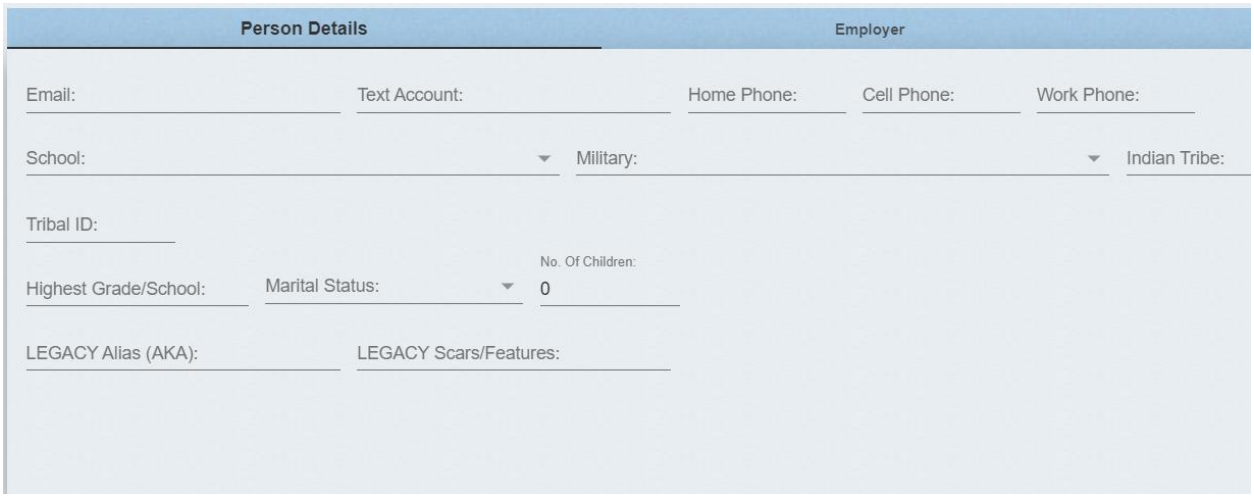
These fields are for identifications (including Driver's License information), and address info. There's also a checkbox and date if the person is deceased.

Master Name Tabs

These tabs allow you to enter additional information on the individual. Typically, you should fill in the first three tabs at minimum. Only the first three are available when making a **new** Master Name, but additional tabs are available when making a new booking with an **existing** Master Name.

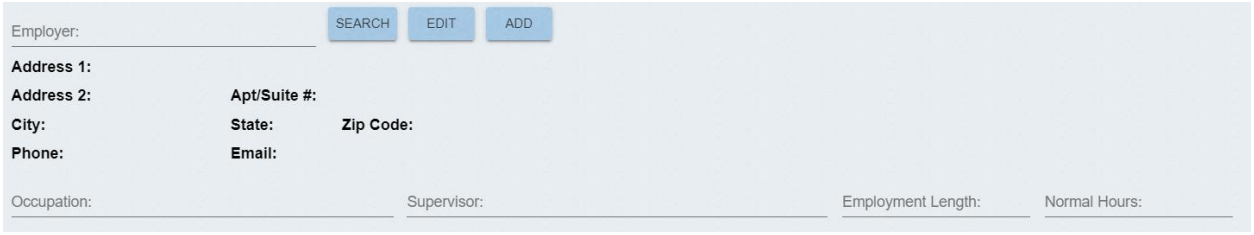


The **Person Details** tab is for information about personal contact info (such as email and phone numbers) and certain ID info, like military, education, and tribal IDs. **Marital Status** and **Number of Children** is also listed here.



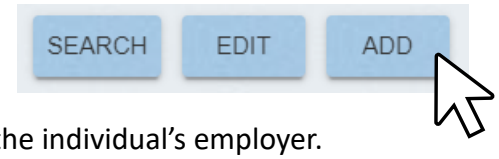


The **Employer** tab is for information on employers and job titles. The Employer system works by storing records of employers. This makes it so that you do not have to continuously re-enter the same information on the same business.

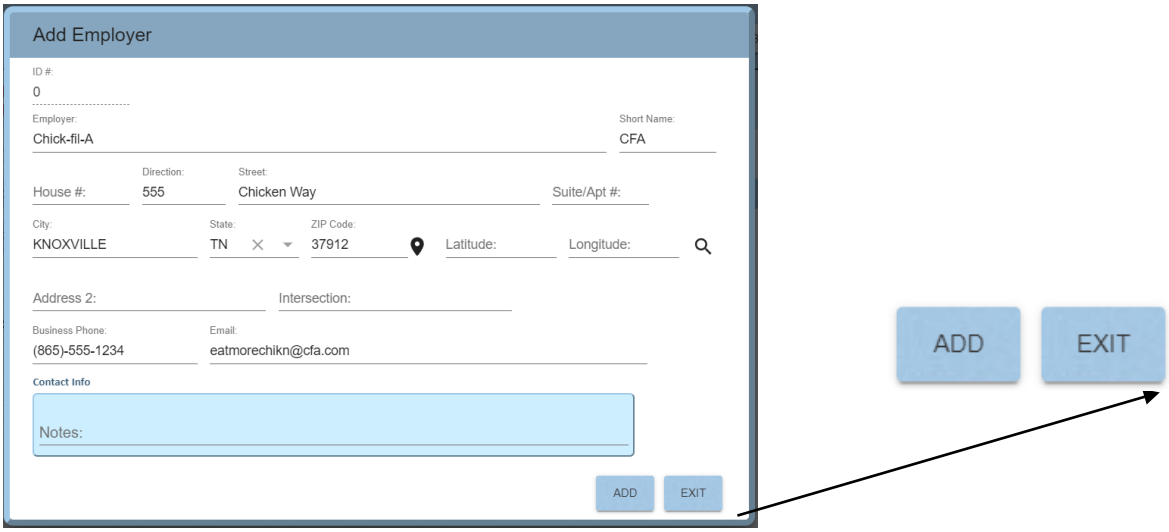


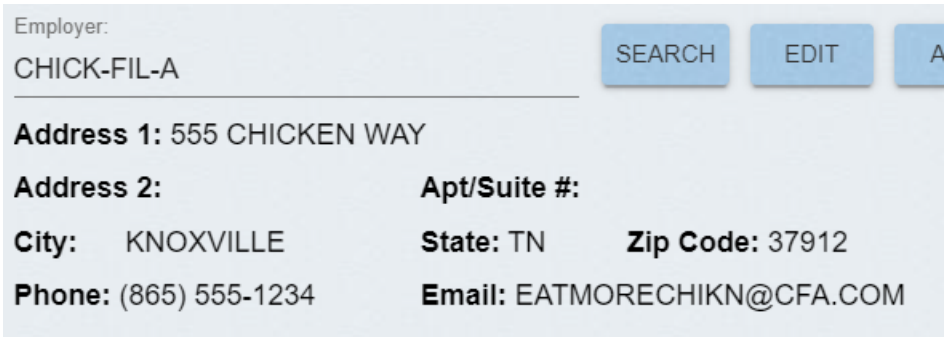
To add a new Employer:

Click **Add** to add a new employer.



Enter the employer information in the window, click **Add** at the bottom of the window, and then this will be marked as the individual's employer.





To edit a current Employer:

Click **Edit** to edit the inmate's current employer.



Click **Save** when you are done editing this employer.

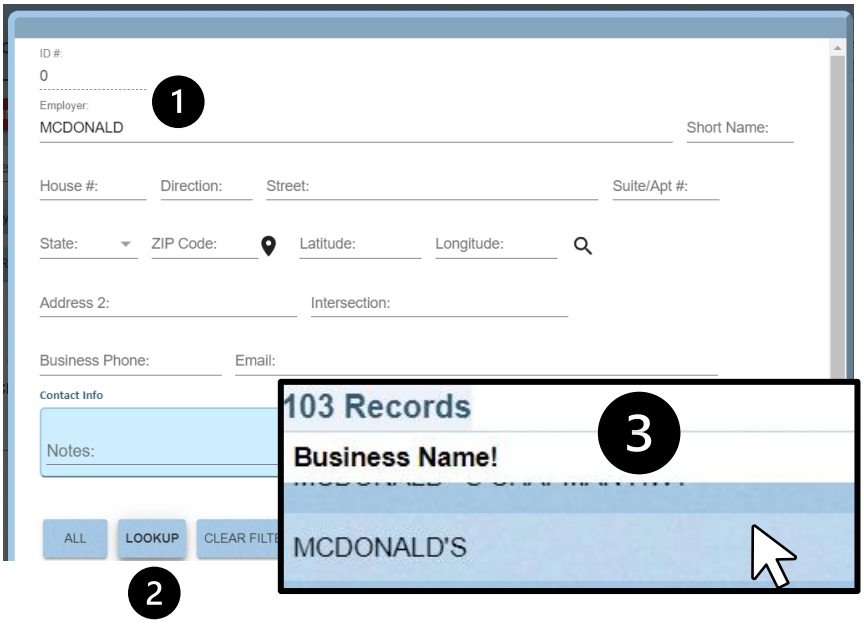


To use an existing Employer:

Click **Search** to use an existing employer.

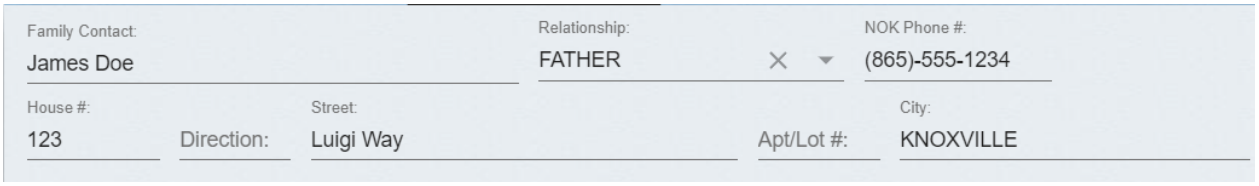


1. Enter the name or other identifying info and click the **Lookup** button near the bottom of the window in order to find existing employer records.
2. Then scroll down the window and select the correct employer from the list by double-click their record.





The **Family Contact** tab is for entering information on the *primary* family contact for this inmate. You can add information on the contact's name, phone number, and address.



Person Details, Employer, and *Family Contact* are the main three tabs, but the rest of tabs can be useful for adding additional identifying or contact information. If you are finished or do not have time to add the rest of the details to the other tabs, you can click **"Save & Create Booking Record."** This will take you to the booking record where the booking information can be filled in.



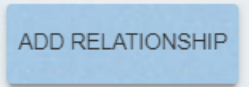
The rest of the tabs are explained on the following pages. When you fill them out in the Master Name tabs, the information can be automatically copied over to other records. Even though you have to take more time to fill out the rest of the tabs, it may help to have more filled out at later points. Note that some of the tabs (*Aliases* and *Address History)* may fill in automatically if you make changes to the Master Name.

TIP: Only the first three tabs (*Person Details, Employer,* and *Family Contact*) will be present if making a new Master Name. You can see the others if using an existing Master Name.

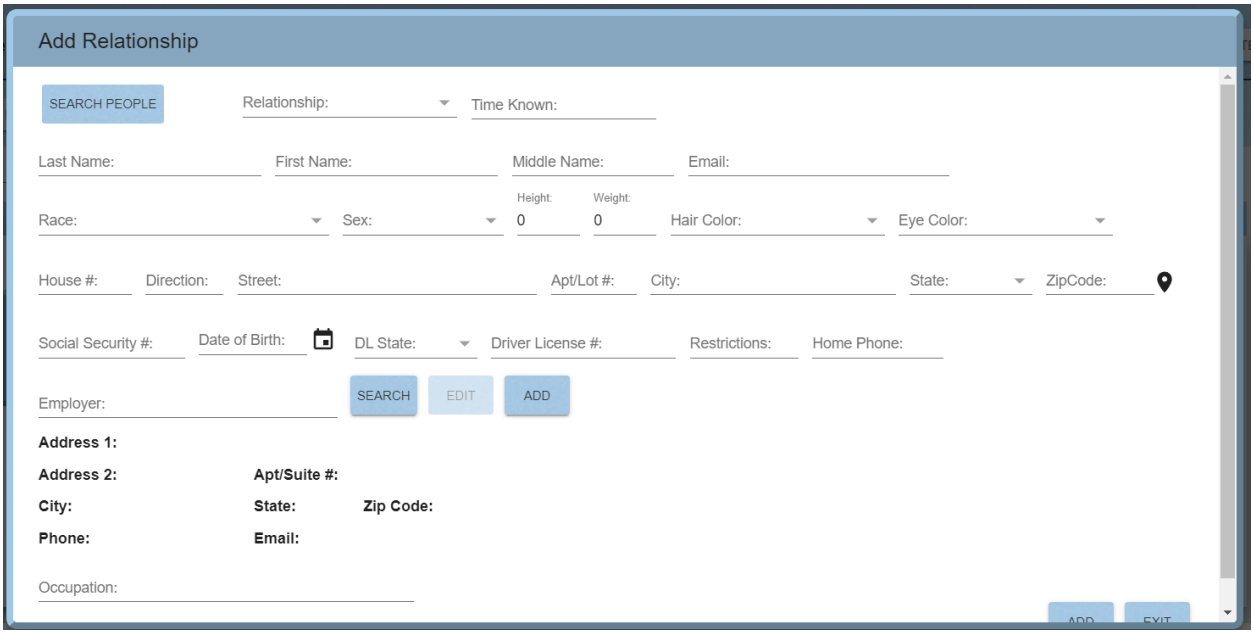
Relationships

Use the **Relationships** tab to add additional important relationships to the inmate. Click **Add Relationship** to add a new person related in some way to this inmate.





To record a relationship, you can either search for people already in your Master Name records or add one here.



Add any biological and identification information you can and make sure to fill out the two fields at the top: **Relationship** and **Time Known**.

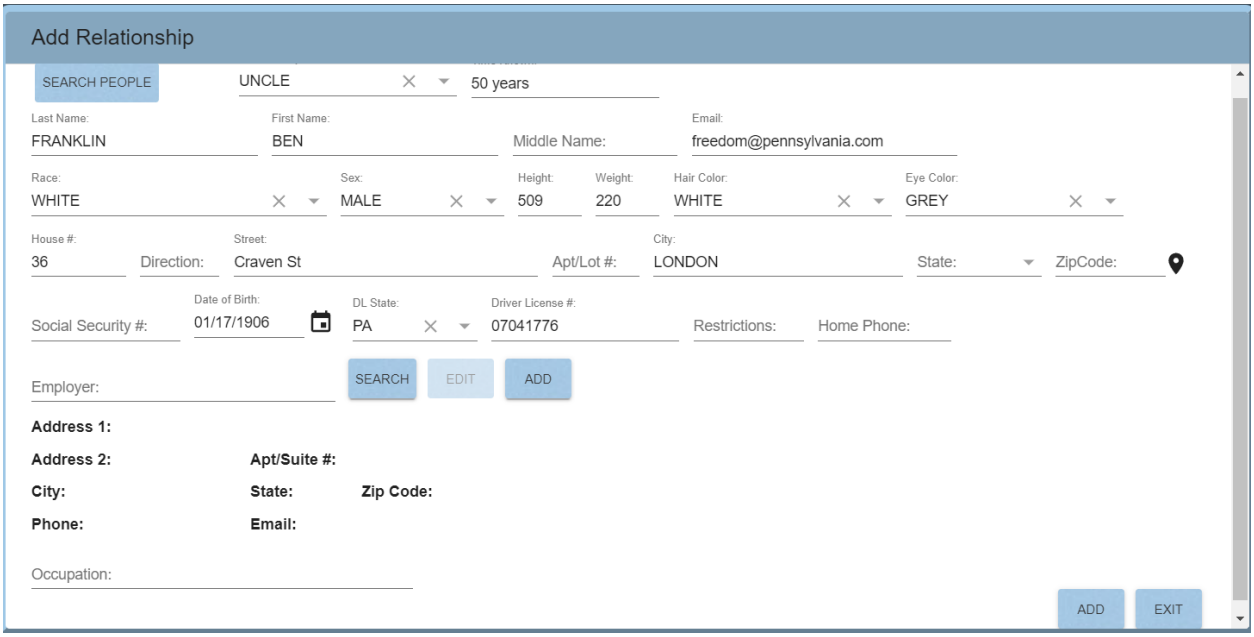
The **Relationship** field lets you add whether this person is a friend, parent, cousin, sibling, etc. and **Time Known** is for the amount of time the two people have known each other.

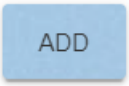




When finished, click **Add** at the bottom to save your record.

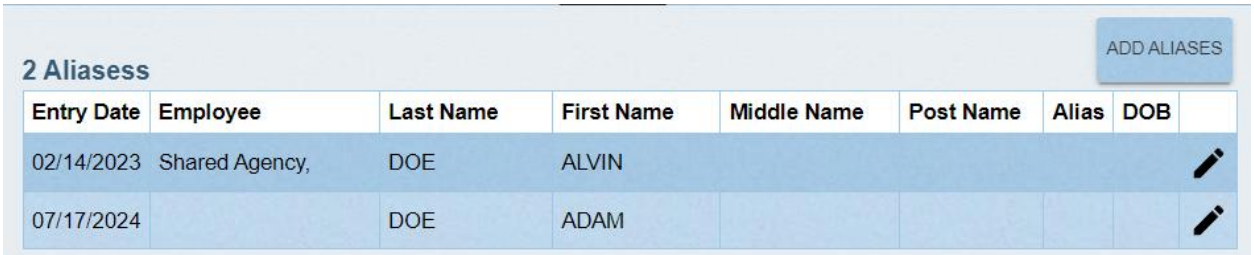
Example Entry





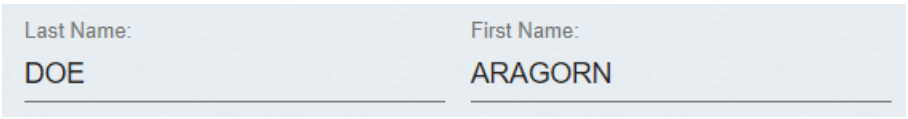
Aliases

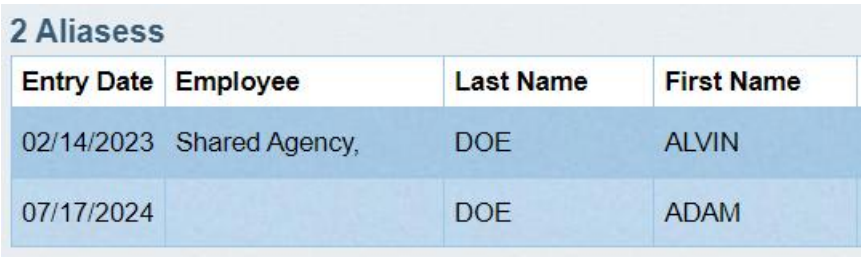
The **Aliases** tab tracks aliases the person has and also tracks past names recorded. To view, edit, or delete an alias, simply double click it from the table or click on the pencil (✎) icon.



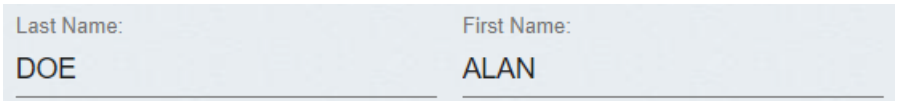
TIP: If you change the name of a pre-existing Master Name, iSOMS will automatically create an alias. Simply change the name and save, and an alias will be created for the Master Name. Since you are creating a new booking, you will only be able to view the automatic change if you access the Master Name later on.

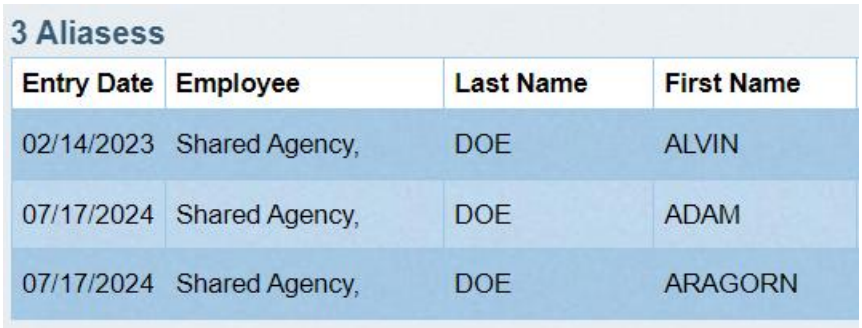
Example before name change:





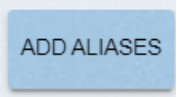
Example after name change:

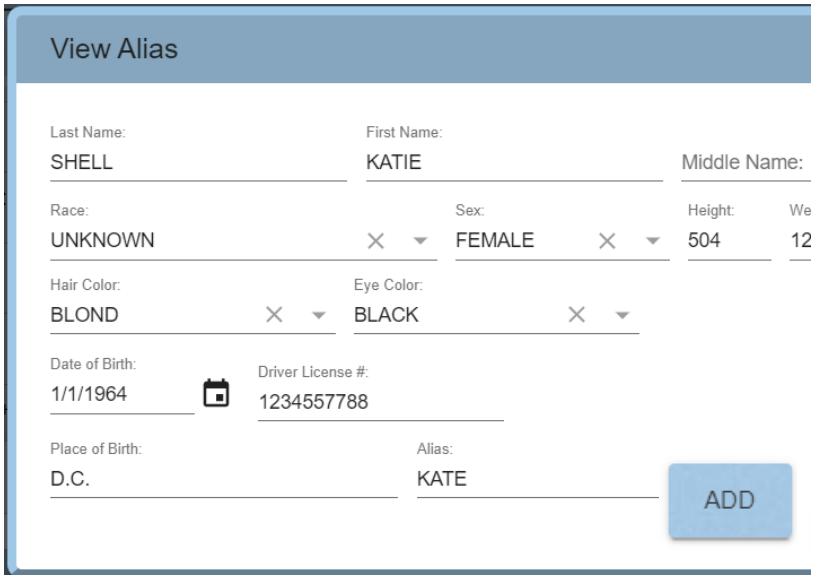




Adding a New Alias Manually

To add an entry, click **Add Aliases** in the upper right corner. The **Last / First / Middle Name** fields are for the actual alias: the ***Alias*** field in the window is for nicknames of the assumed identity. Add information about the assumed identity or alias and then click **ADD** when finished.





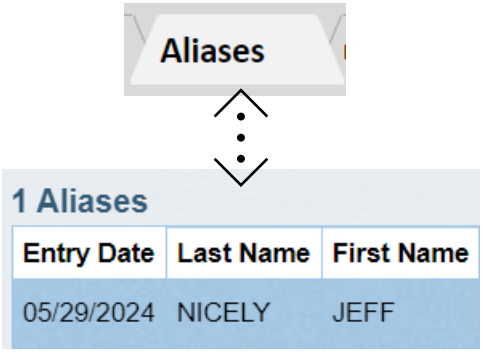
Aliases from Master Name

If you have merged two Master Names, the removed one will become an alias on the original's record. This keeps the original name record, which is especially useful when someone was going by a different name than their real name. Note the names listed here are for the alias: the name of the person will be stored in the main fields and not the alias tab. For more information, see *Merging Master Names* on page 718.

ALIAS

Created by the merge

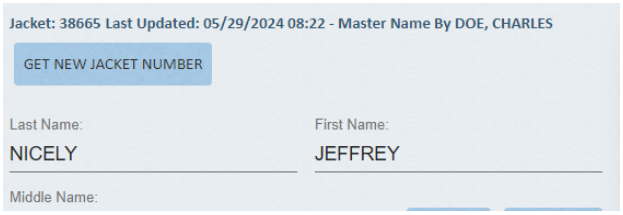
Under the Alias Tab



MASTER NAME

Original full name, not an alias

Under the main entry at page top



Features

The **Features** tab lists any important physical features for the inmate, such as scars, missing teeth, tattoos, etc.

Double-click an existing entry to edit it.

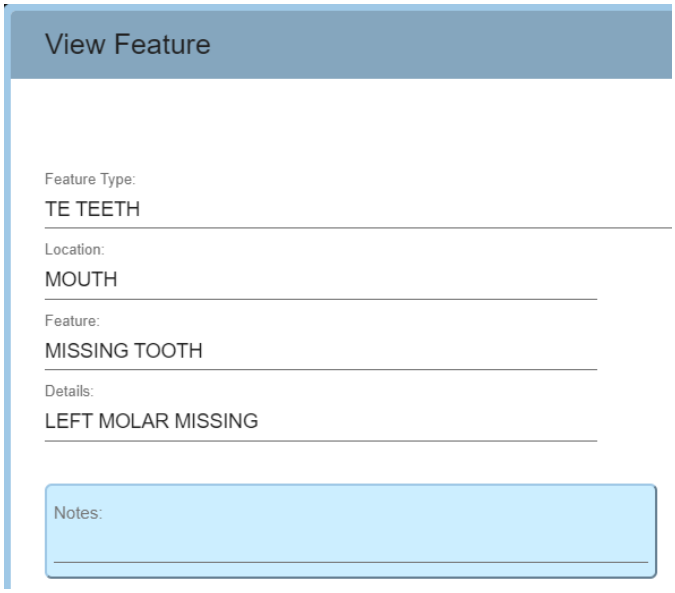


IMPORTANT: Features will also be imported from the Master Name if a Master Name with features was used to create the booking record. If features are updated in the *Features* tab in the booking record, it will not update the Master Name / Jacket. It is best if the information was entered ahead of time here in the Master Name.

Adding a New Feature

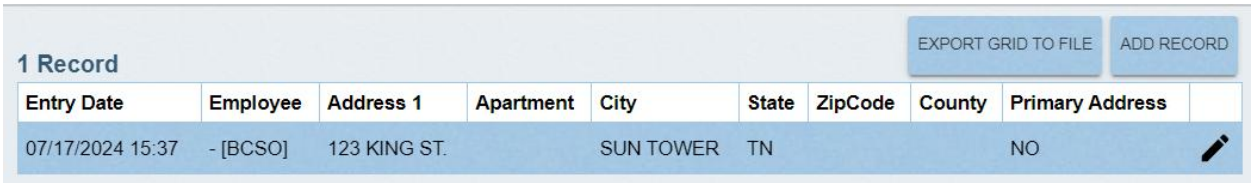
To add a new feature, click the **Add Feature** button. In the new window, add the **Feature Type, Location, Feature,** and **Details**. You can also add a photo of the feature if appropriate, as well as any notes needed for later reference.

When finished, click **Save** at the bottom of the window to save the feature.



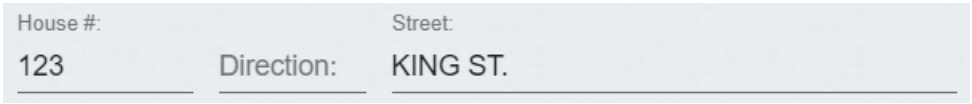
Address History

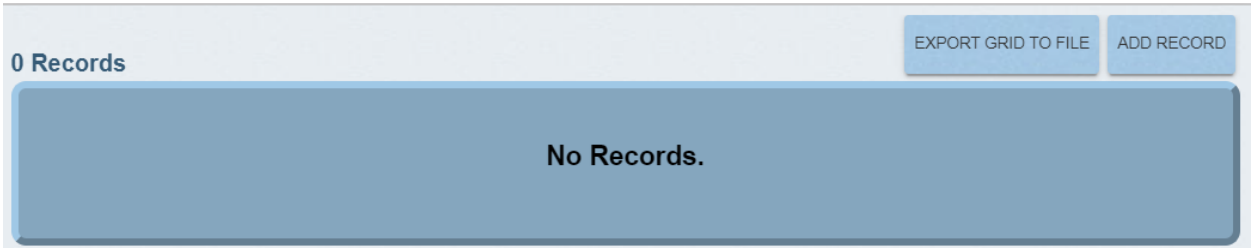
The **Address History** tab will keep track of the history of streets where the individual *used to live*. The main address is listed above the headings in the fields. To view, edit, or delete an entry, double click it from the table.



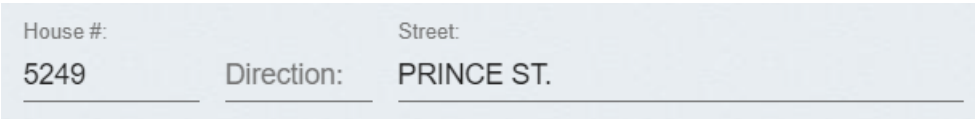
TIP: If you change any address details of a pre-existing Master Name, iSOMS will automatically create an address history record. Simply change the address and save, and the old address will become an address history record for the Master Name. Since you are creating a new booking, you will only be able to view the automatic change if you access the Master Name later on.

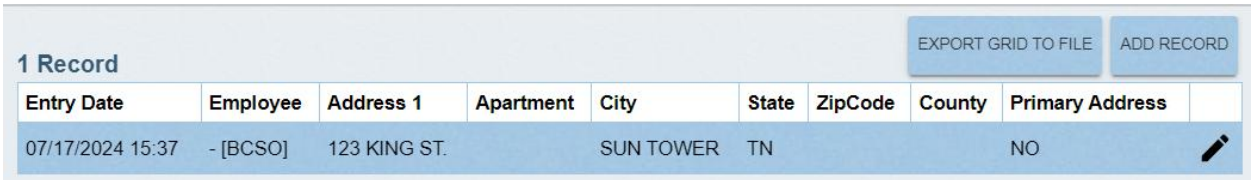
Example before Address Change:





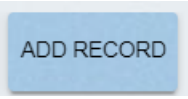
Example after Address Change:



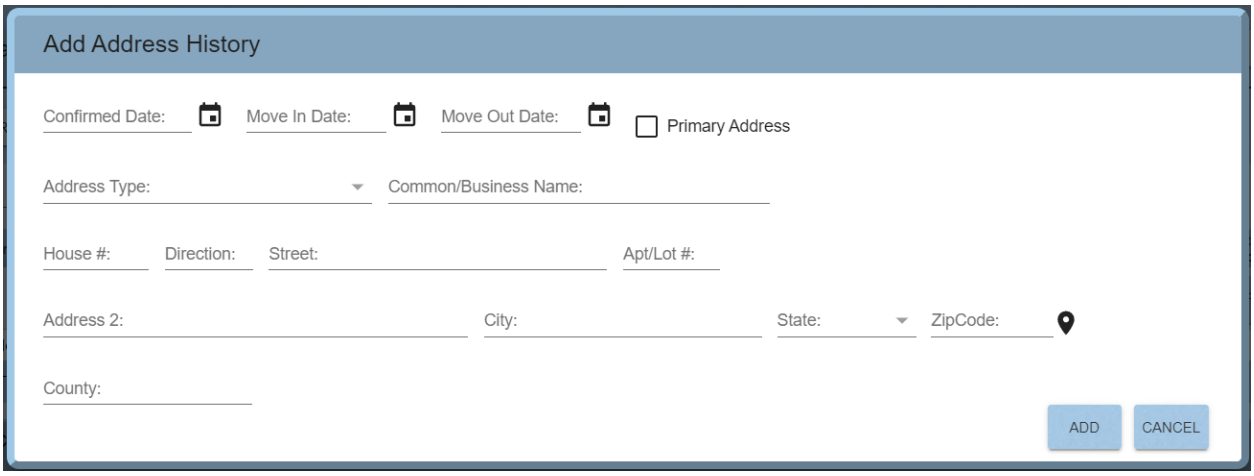


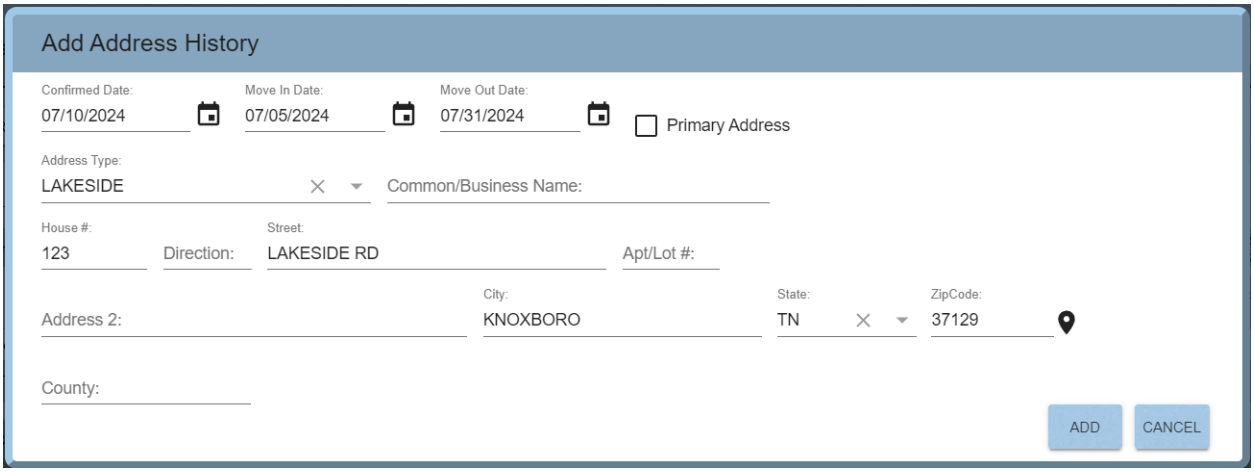
Adding a New Address History Manually

To add an entry, click **Add Record** in the upper right corner.



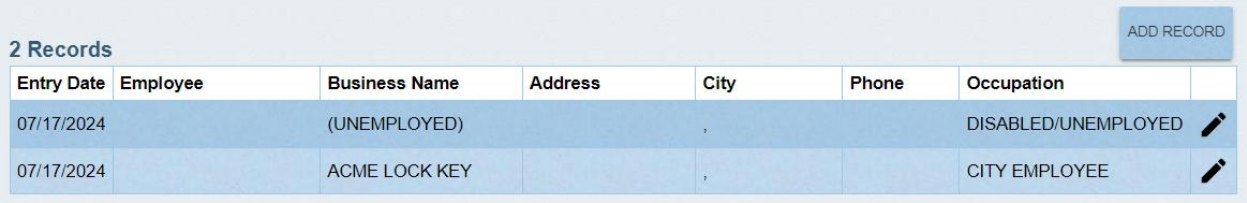
Fill in any desired information on the address and click **Add** when finished.





Employer History

The **Employer History** tab can be used to track previous employers. To view, change, or delete an entry, simply double click it on the table.



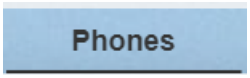
If you want to add a new entry, just click **Add Record** and type in the employer's name.



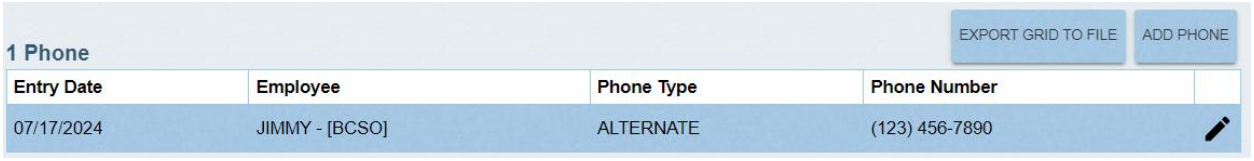
If it is not in your system, click **ADD** near the top of the window and fill in the details.

Once you have the employer, add **Occupation** for the position, add how long they had the employment in **Employment Length**, and **Normal Hours** if their working hours are known.

Click the **ADD** at the *bottom* of the window to save the record.



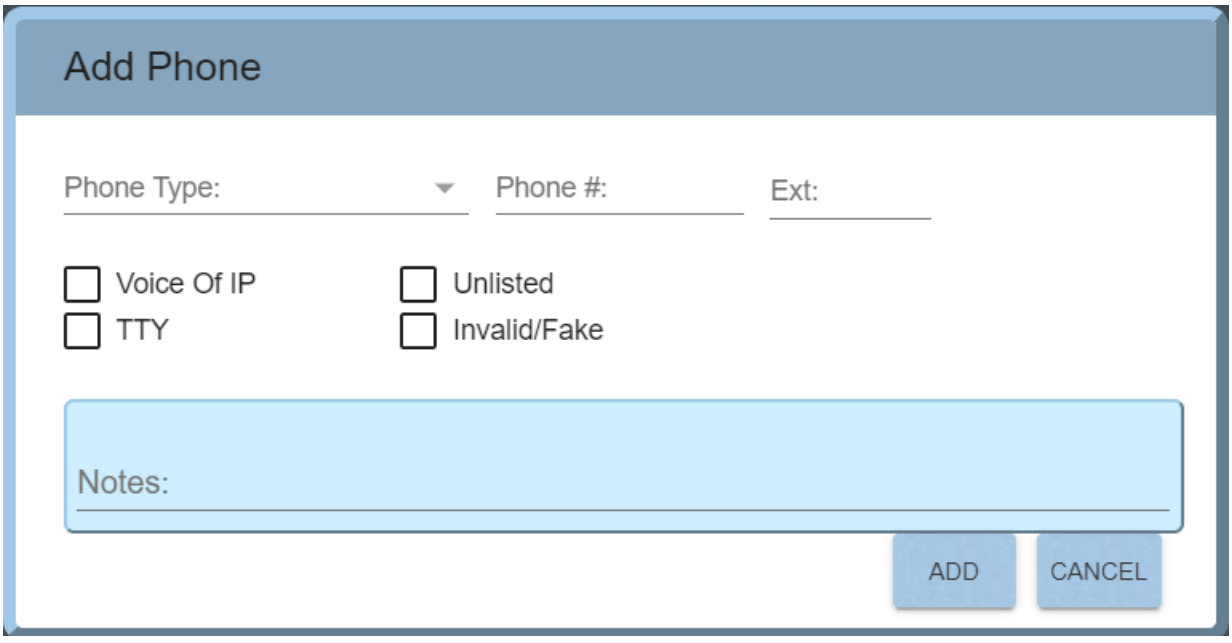
The **Phones** tab allows you to record previous phone numbers on the Master Name. To view, edit, or delete an entry, double click it on the table.



If you want to add a new entry, just click **Add Phone** and type in the necessary information.



You can add the **Phone Type,** such as home or cell. If the phone has special things to consider, such as an unlisted or fake number, you can check the box and add applicable notes.

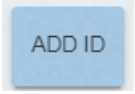




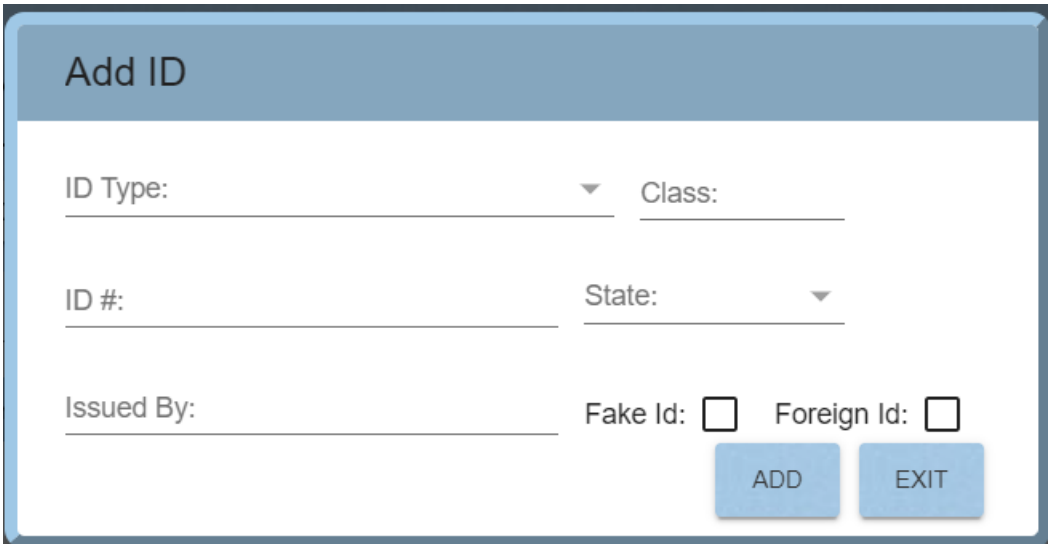
The **ID** tab lets you track previous IDs that are expired or don't fall into the categories listed in the fields above, such as green card, gang ID, or others. To view, edit, or delete an entry, double click it on the table.



If you want to add a new entry, just click **Add ID** and type in the necessary information.

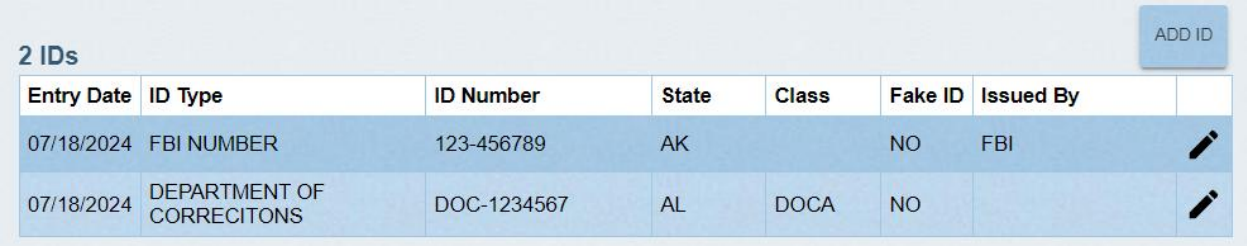


ID Type lists the ID type. Add the ID number and issuer. You can also include *Fake* or *Foreign ID.* When finished, click **ADD** to add the ID record to the table.

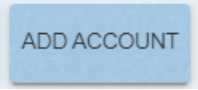


Internet Accounts

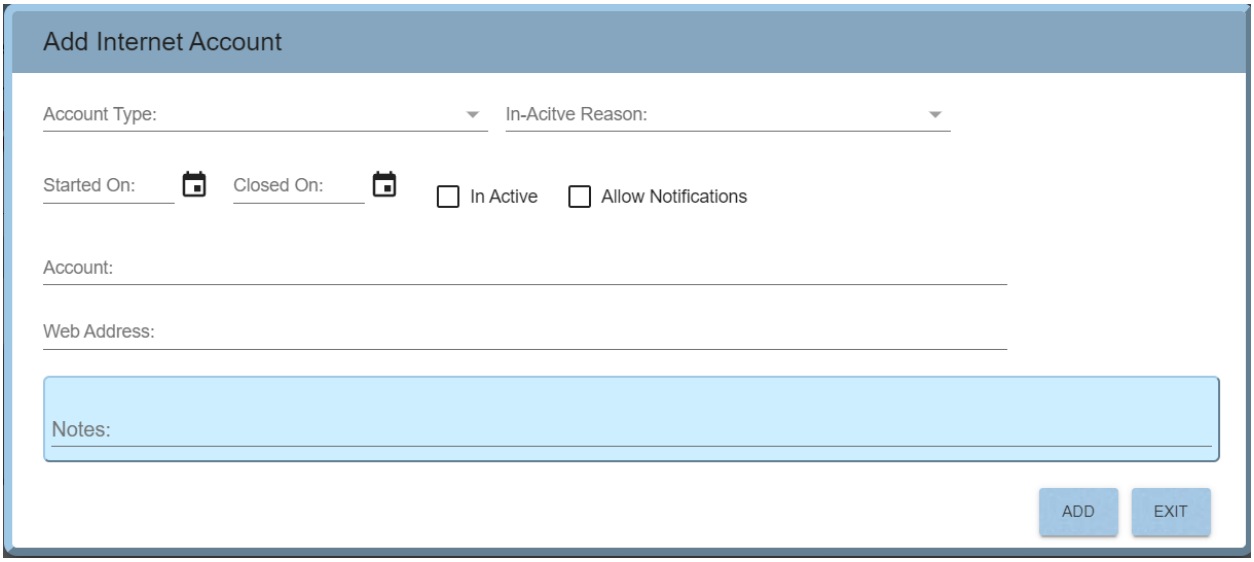
The **Internet Accounts** tab lets you track online accounts, such as shopping, social media, or other accounts. To view, edit, or delete an entry, double click it on the table.



If you want to add a new entry, just click **Add Account** and type in the necessary information.



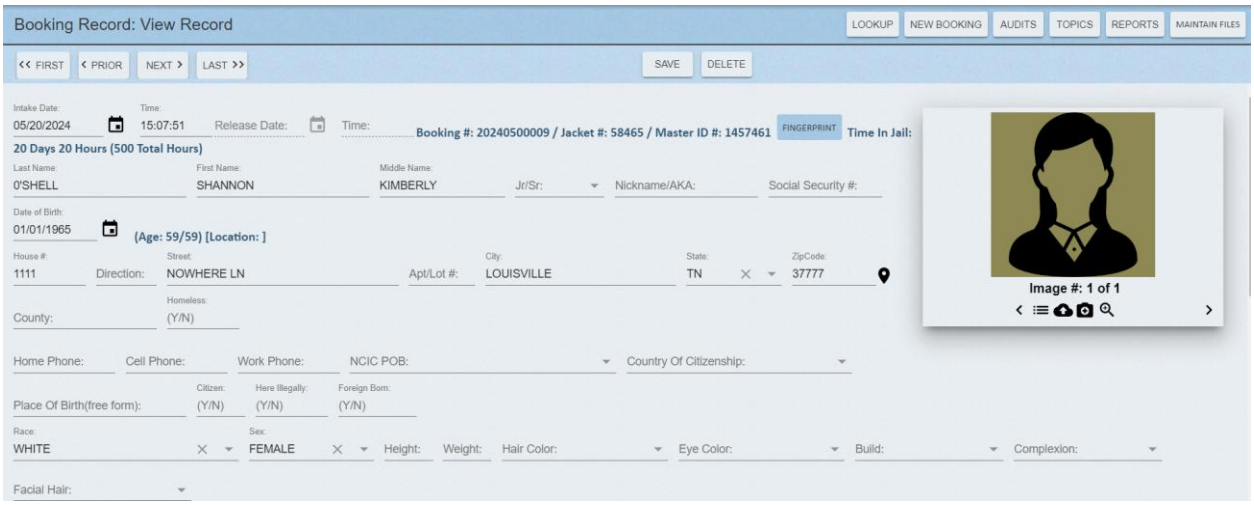
You can use **Account Type** to help identify the account type. Make sure to add the account name under **Account** and the website in **Web Address.** Add any applicable notes and click **Add** to save the entry.



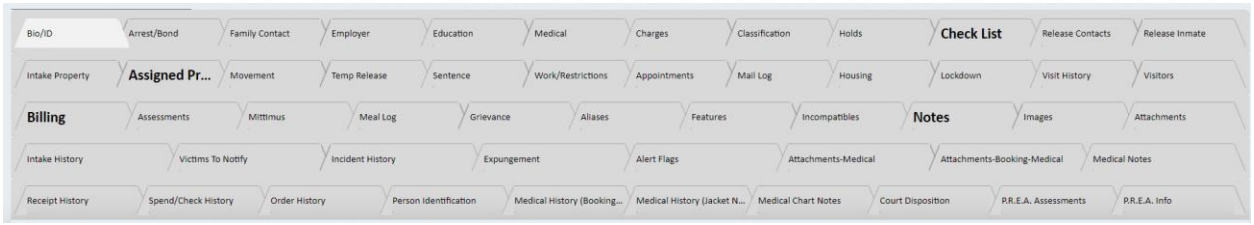
Filling In a Booking Record

After you create a booking record from any of the methods mentioned, you will need to fill in the booking record. The booking record has two main parts:

1. The fields at the top of the screen. These can have personal information, booking number, jacket number, release date and time in jail, etc.



2. The tabs below the fields, near the bottom of the screen. These tabs have a large amount of information that can be inputted, so we will go through them.



TIP: Occasionally you may realize that you created a new Master Name even though the person was already in your system. You can merge Master Names to get rid of duplicate records – see page 718.

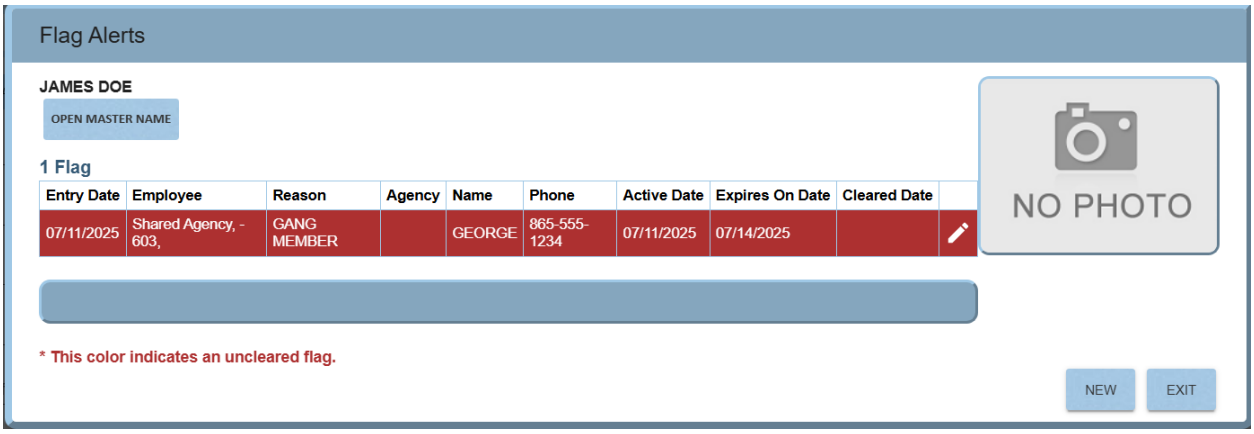
Alert Flags

Alert flags are notifications of critical information that will pop up whenever you open the booking record. They can be added directly under the **Alert Flags** tab. While the next few sections will discuss each field and tab in order, this section will discuss how to add Alert Tabs because they are often **critically important.**

You need to add alert flags to help others see important information as soon as they open the booking. For example, if an inmate is a member of a gang, a sex offender, or is at suicide risk, the alert flag lets others know these important facts immediately.

Viewing an Alert Flag

If anyone has added an Alert Flag to a booking, then whenever you open the booking, the Alert Flag will appear. For example, if a booking was marked with an alert flag for being a gang member, then when you open the booking, you will see the alert immediately:



TIP: You should use alerts whenever it would be important to know something immediately, such as gang membership, a medical need, or if armed and dangerous.

Adding an Alert Flag

To add an alert flag, scroll down the booking and click on the **Alert Flags** tab. Click on the **Add Alert Flag** button.

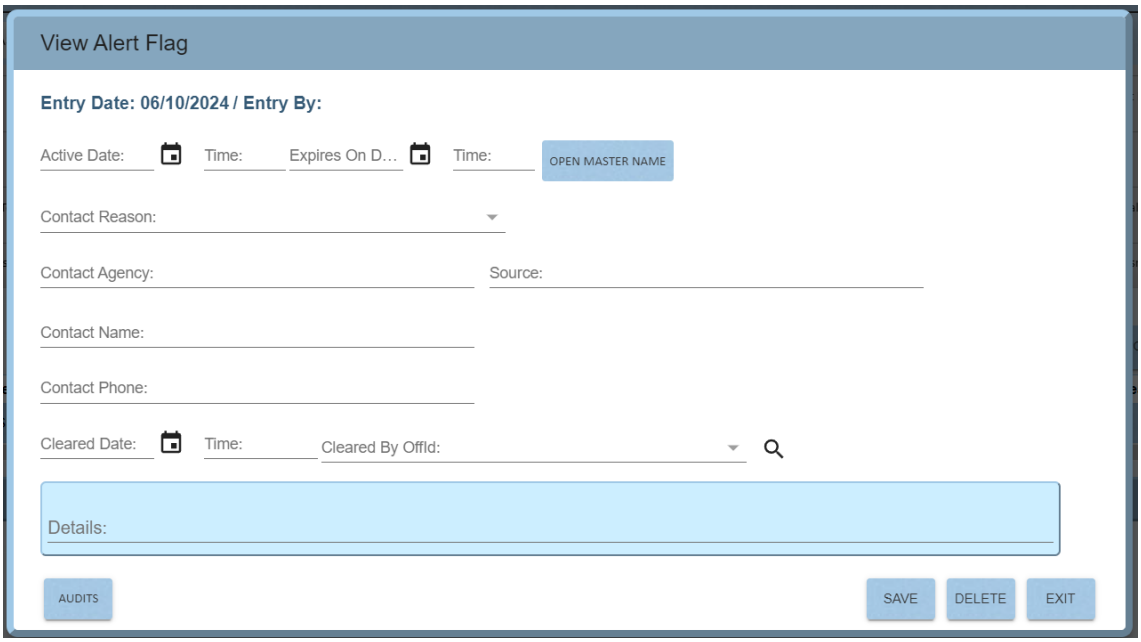




After clicking on the Add Alert Flag button, iSOMS will ask if you want to create a new Alert Flag. Click **Yes:**



This will open the new Alert Flag screen:



Filling Out an Alert Flag

Active Date and time are for when the flag becomes active. If you do not put an active date, the flag will still appear.



You can add **Expires on Date** to let others know when the reason for the flag is no longer relevant, **but this does not stop the flag from appearing.**

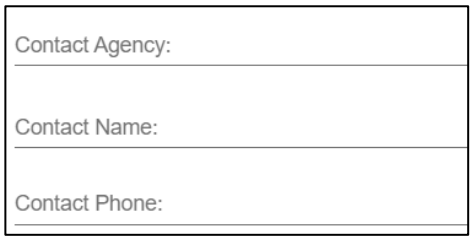


The **Contact Reason** fields are for the different alerts. Choose the reason for the alert so whoever opens this booking will see it immediately. The available options are:



Address Changed	Gang Member	Suicide Risk
Armed and Dangerous	Information	Suspected Drug / Narcotics
Currently on Probation	Medical	Suspected Gang Member
Deceased	Other	Suspected Medical Cond.
Flight Risk	Reg. Sex Offender	Trespassing

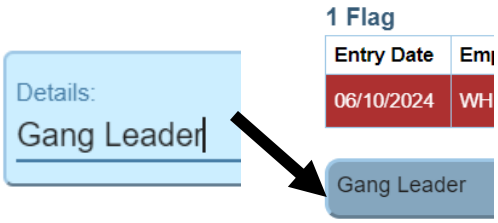
The **Contact Agency, Source, Name, and Phone** fields are for who to contact when seeing this alert if the information needs to be acted upon.



Add a **Cleared Date** (and the ID for the officer who cleared it) to make the alert **stop** appearing when the booking is opened.

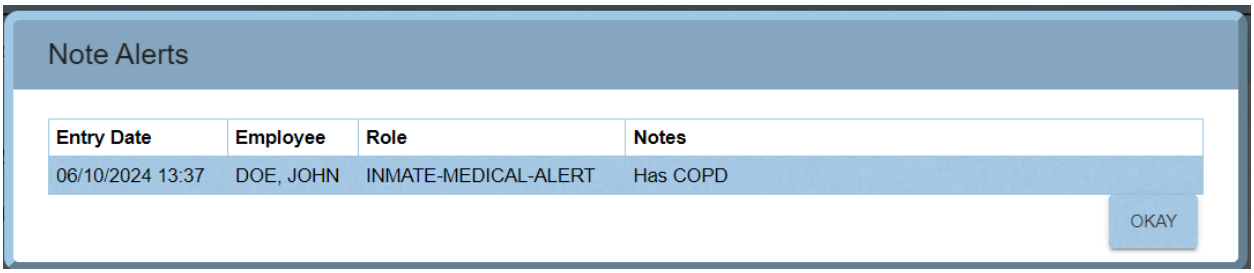


The **Details** box allows you to write notes that appear with the alert. Use this box to communicate additional info beyond the reason given above.

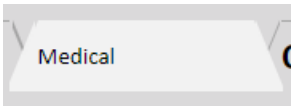


Medical Alerts

Alerts can also be made via a different tab - the **Medical Tab.** These alerts are for medical staff and are used when the inmate has some sort of medical need. They look like this:



To add a medical alert in this manner, navigate to the **Medical** tab:



Click one of the **ALERT** buttons available and fill in a note. This will alert whoever opens information on this inmate.



The **Master Name** alerts send out an alert when the Master Name is used.



These alerts are triggered when the booking is opened. **Booking Medical Alert** is shown to **medical staff** only, while **Booking Alert** is for a medical need that any officer should be able to see.



The **Allergy and Disease Medical Alerts** are to alert **medical staff** to allergies and disease.

Identification Fields

When you are looking at a booking record, the information in the fields above the tabs will fill in. That information came from pre-booking, importing offender information, using an existing Master Name, or creating a new Master Name. You can add or edit this information as needed. Verify that this is the correct person and add anything missing here.

IMPORTANT: Make sure to verify the information that has been correctly entered in the fields, such as birth date, Driver's License, address, etc**. This is important to ensure accurate information on inmates.**

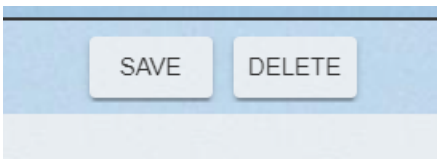
Filling in Booking Tabs and Tab Information

In the lower half of the screen are several rows of tabs and this is where you will enter the information for the booking. Fill in as much information as you can add. The next section will cover the different tabs and what information should be included under each one.

Your agency may have a checklist of required information. If so, be sure to follow it. The information for each tab is discussed below. If you are a supervisor or leader who is trying to decide what information is necessary, be sure to check out the different tabs to see what you think will be a good fit for your checklist.

Fill in the first six tabs (**Bio/ID, Arrest/Bond, Family Contact, Employer, Education, Medical**) and then go to the **Checklist** tab. Perform any necessary actions there to finish intake and then save the booking. The rest of the tabs can be added afterwards, either immediately if you are able or later on if necessary.

IMPORTANT: Click **Save** at the top of the booking record after information is entered into each tab. If you do not click "**Save**" as you complete each tab, information may be lost.



Corrections Manual

List of Tabs

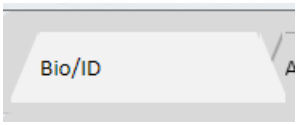
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IMPORTANT: At a minimum, the first six tabs should be filled in to save the booking: **Bio/ID, Arrest/Bond, Family Contact, Employer, Education, Medical**

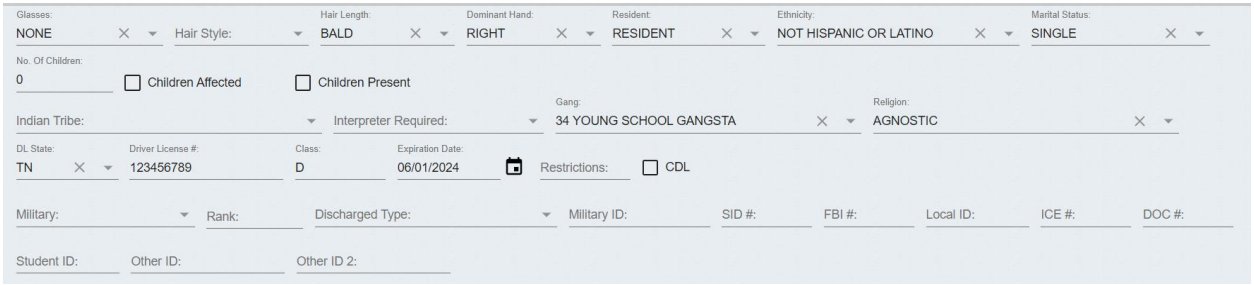


Bio / ID Tab

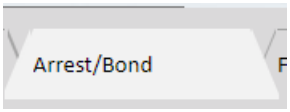


The **Bio/ID** tab is where you can enter personal information for the inmate such as appearance characteristics, gang affiliation, ID information and more. If using an existing Master Name, some of this information will load in from the Master Name file. Click "**Save"** after filling out.

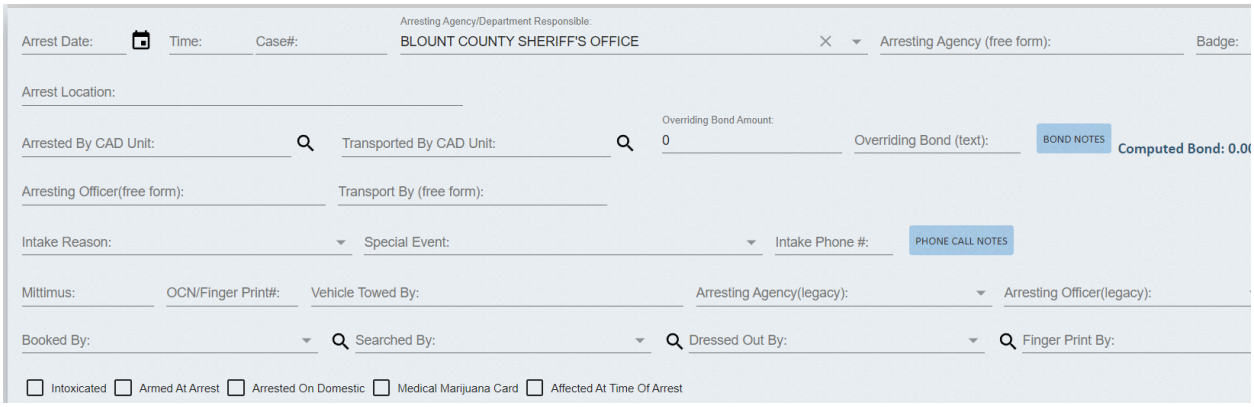
NOTE: If you update information here, it will not update the jacket number, so it is a good idea to update this information in the Master Name before creating the booking record. See **Creating a New Master Name** on page 52 for more information, including on fields to fill out.



Arrest / Bond Tab



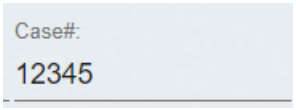
The **Arrest/Bond** is where you can enter information specific to the arrest, bond information and more.



List of Certain Fields



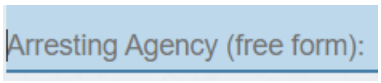
Arrest Date / Time is for the date and time of arrest.



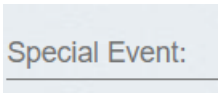
Case # allows you to add a case # for this arrest.



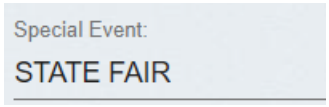
The **Arresting Agency/Department Responsible** field should be the agency that made the original arrest; however, this field can be changed to the Department Responsible for billing purposes. For example, if an inmate becomes a state inmate but will still be housed in a county facility, this field would be changed to the state's DOC for the purposes of board billing. See the *Board Billing* section on page 246.



Use the **Arresting Agency** to keep the information on which agency arrested this inmate even when using the **Department Responsible** field for billing.



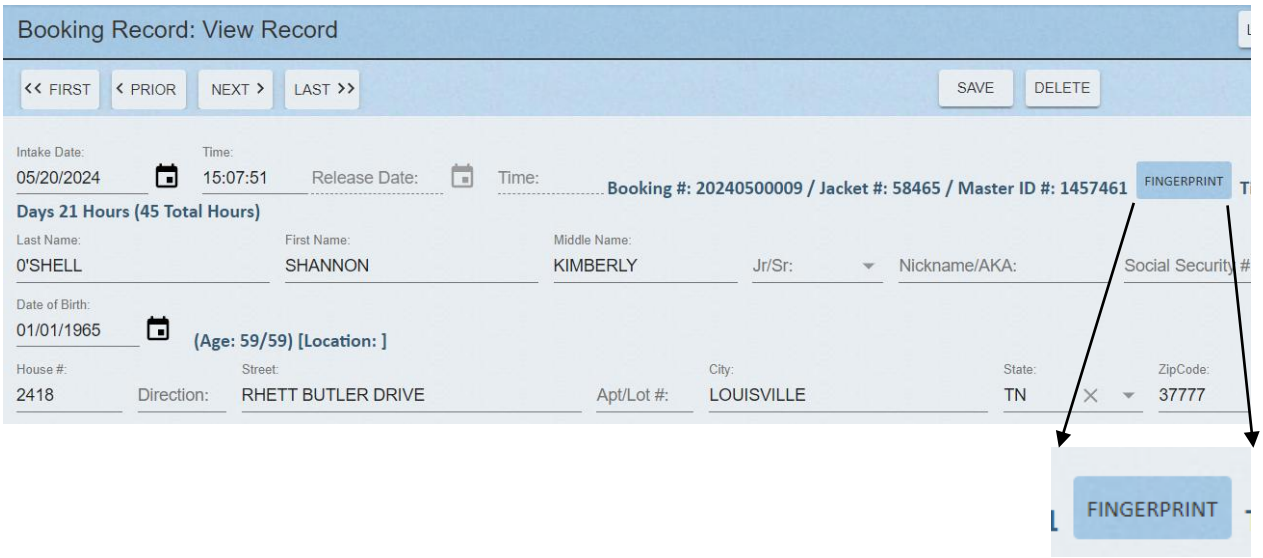
The **Special Event** field is to record if a certain event or activity was happening at the time of the arrest, such as a state fair, sports event, or community event. These events can be added by Super Users.



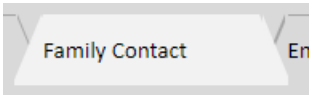
Fill out the rest of the fields on the arrest and click "**Save"** after filling out.

IMPORTANT: Fingerprint Request

After filling out the above two tabs, it is good practice to click the "**Fingerprint**" button at the top of the screen to send the request to the fingerprint machine. This request can take a few minutes to process, so sending it now can save time while the rest of the record is being filled out.



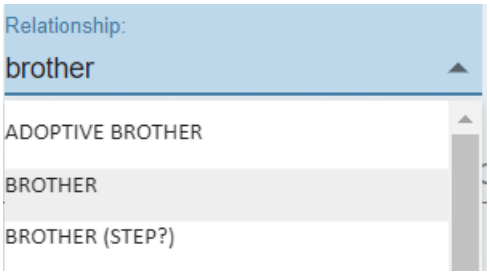
Family Contact Tab



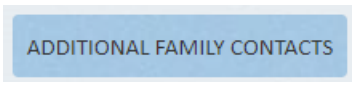
The **Family Contact** tab is where you can enter information for family or emergency contact for the inmate. The fields allow you to enter one person's contact information.

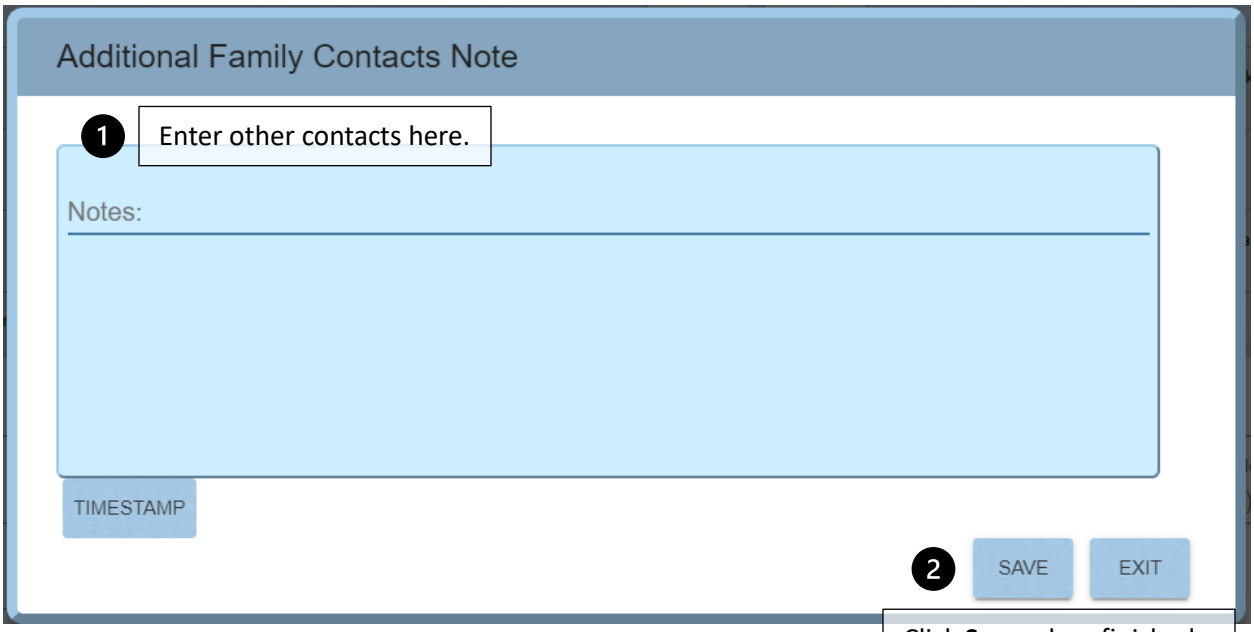


Be sure to use the **Relationship** field to record the relationship each person has to the inmate. The field has many possible entries, but you can search by typing in the field and then selecting the desired entry.

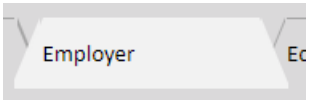


If you need additional contacts, they should be entered as notes using the "**Additional Family Contacts**" button. Click "**Save"** after filling out.





Employer Tab

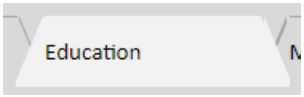


This tab is where you can enter the inmate's employer information, such as address and job title. If you need to enter additional employers, click "**Add.**" Click "**Save**" after filling out.

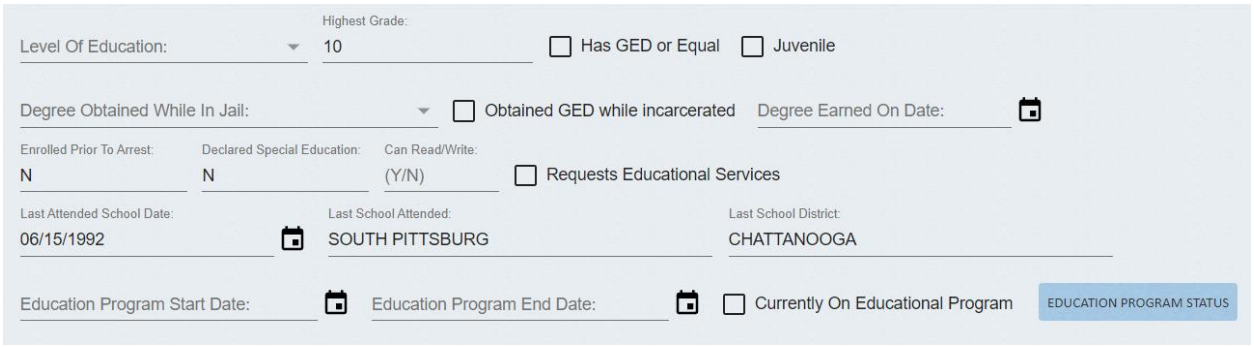
NOTE: If you update information here, it will not update the jacket number, so it is a good idea to update this information in the Master Name before creating the booking record. See *Creating a New Master Name* on page 52, or on page 55 for *Employers* specifically. If you forgot, simply fill this in, but make sure to fill the information in the Master Name.



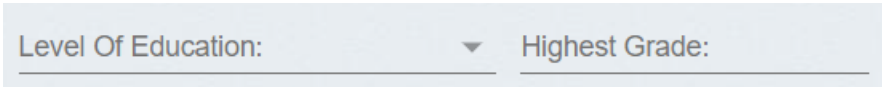
Education Tab



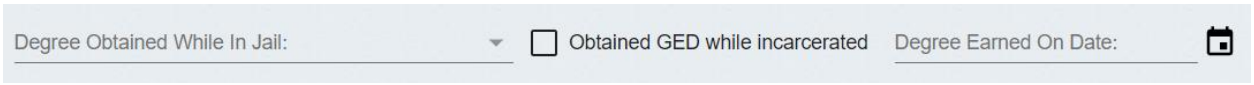
The **Education** tab is where you enter the inmate's education information.



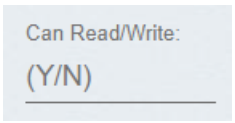
Selected Field Explanation



Record the **Level of Education** and **Highest Grades** each inmate finished in these fields.



These fields are for recording information on the inmate's education while incarcerated.



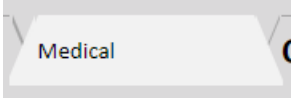
If the inmate is illiterate, use **Can Read/Write** to record this information.



These fields relate to records for any educational program your agency has.

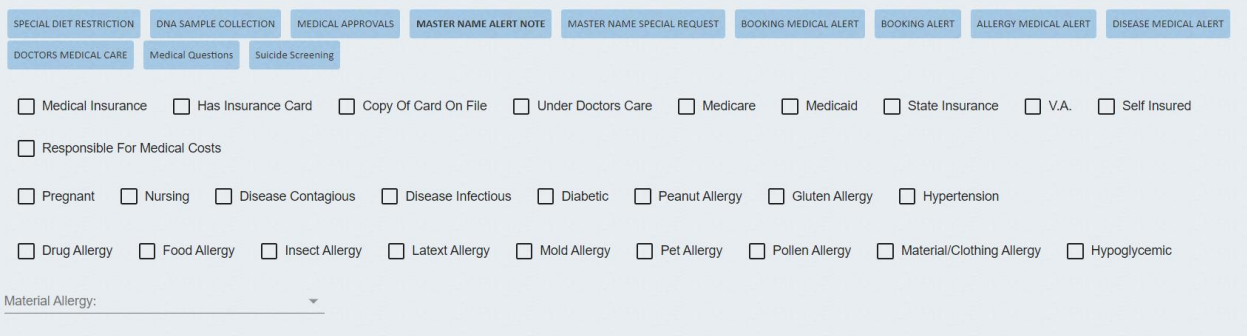
Click "**Save"** after filling out.

Medical Tab

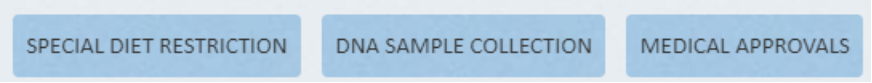


The **Medical** tab is where medical information will be entered. The buttons along the top are for inputting different pieces of medical information, including alerts to notify on opening the booking record. Let's take a quick look at what some of the buttons do.

In this section…
Diet / DNA / Approvals
Medical Alerts
Doctor Medical Care
Medical Survey
Medical Info

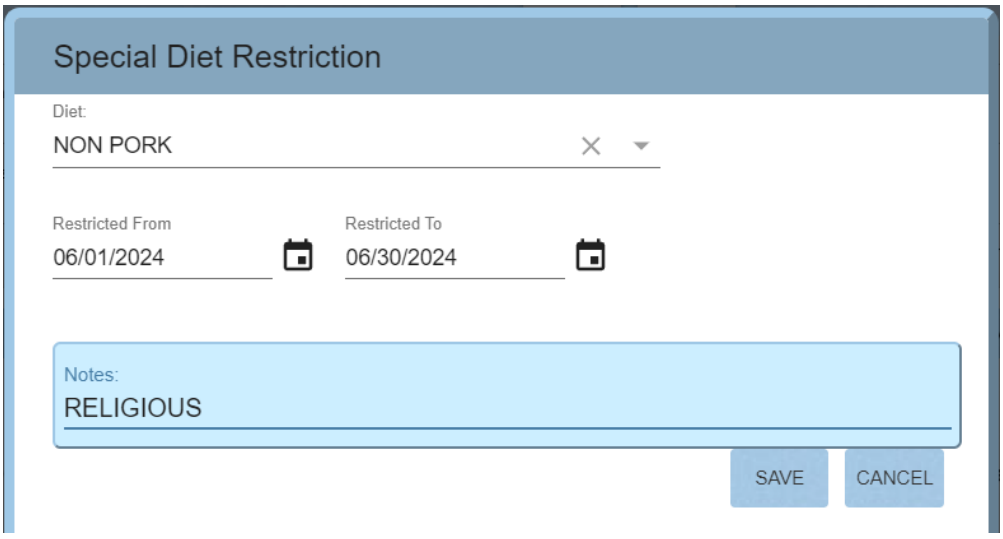


Diet / DNA / Approvals

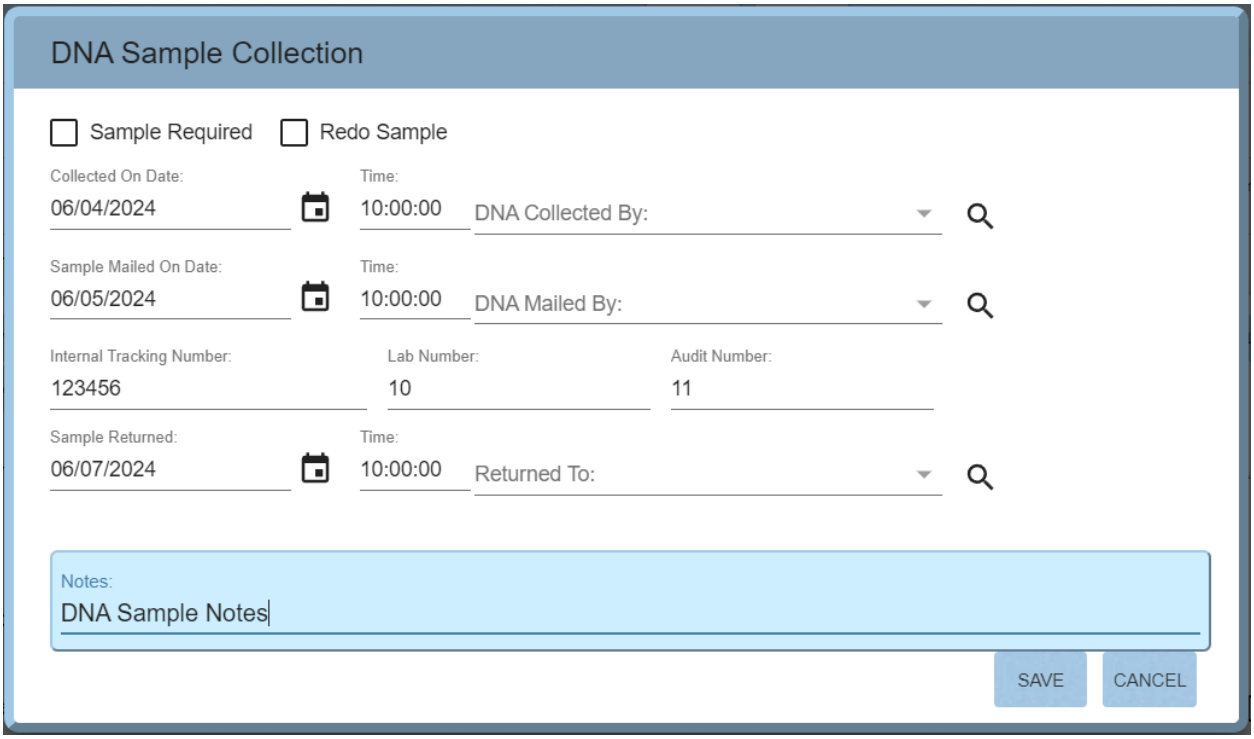


These buttons are for recording diet restrictions, DNA samples, and medical approvals.

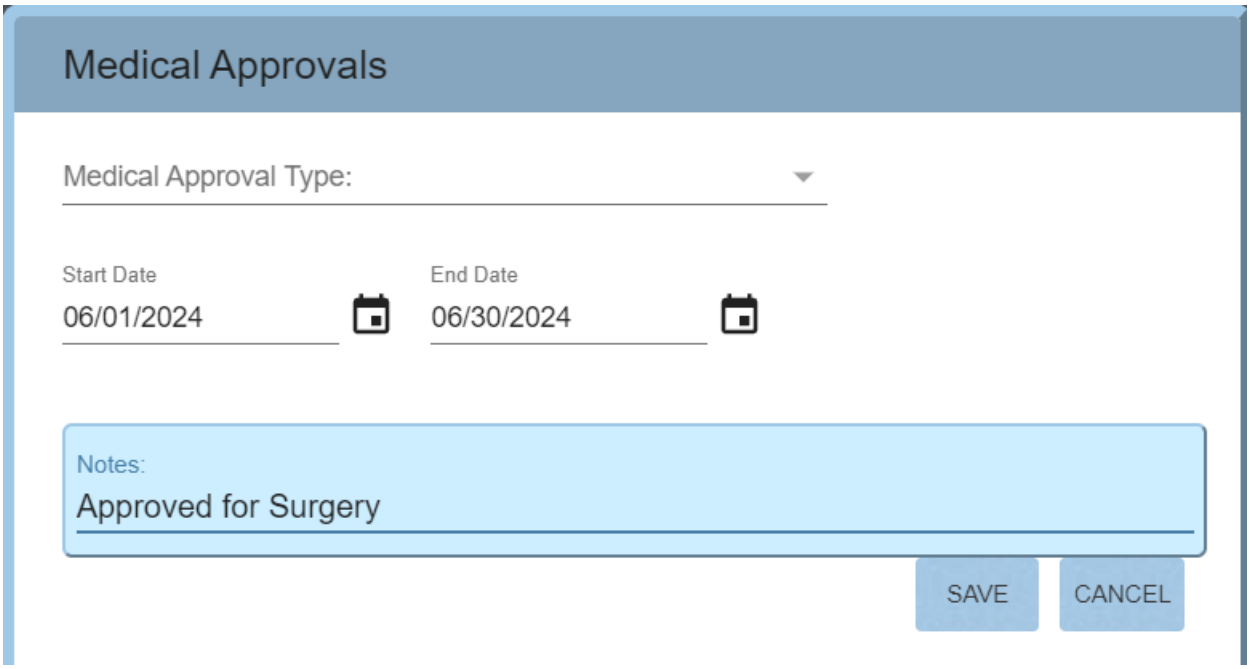
Special Diet Restriction allows you to enter any diet restrictions the inmate has.



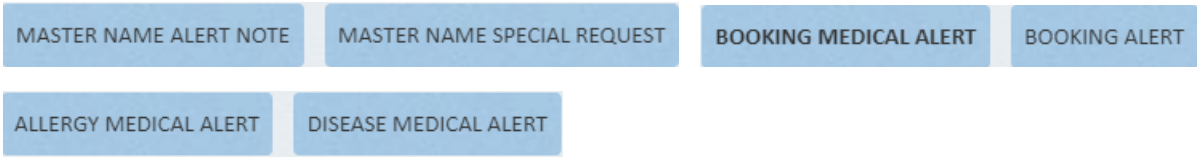
DNA Sample Collection lets you record information about DNA samples collected.



The **Medical Approvals** button allows supervisors and medical supervisors to provide medical approvals for medical info so others can see them.



Alerts and Notes

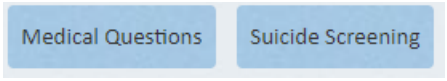


These buttons provide alerts when you open and view a booking. You should enter any necessary medical information in here to help with allergies or disease, so that an alert will appear when opening the booking to ensure proper medical care. See **Alert Flags** on page 70 for more information.



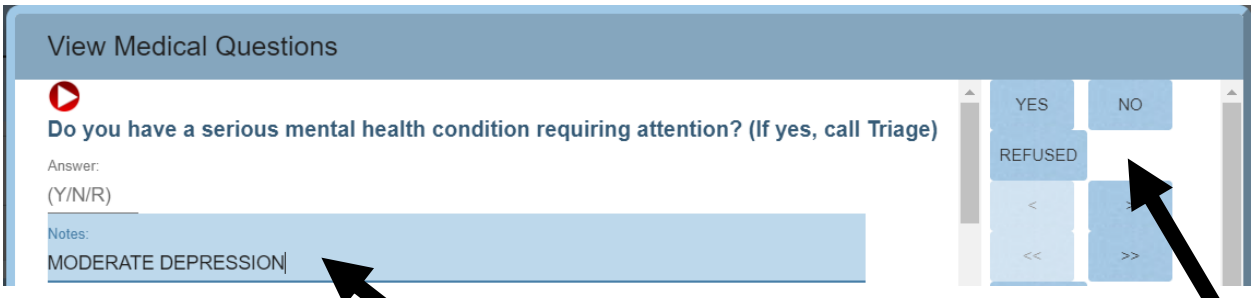
The **Doctors Medical Care** allows doctors to put instructions or other information for the inmate so that officers can view it as needed.

Medical Question Screening



The medical questionnaire, which is accessed using the **Medical Questions** button, should be filled out when booking an inmate. The **Suicide Screening** lets you record suicide screening questions. The **Medical Questions** includes the same questions from the suicide screening, so you typically do not need to fill out the suicide screening separately.

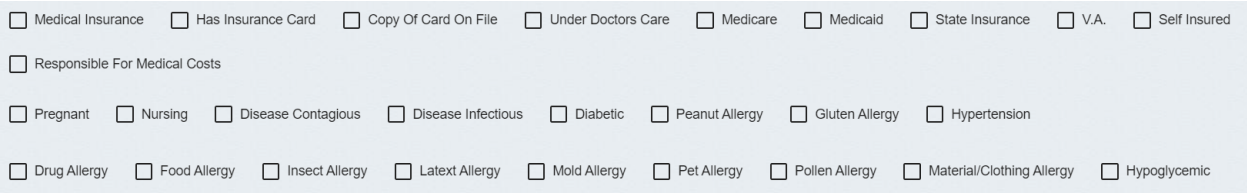
In order to fill out the questionnaire, click the **Medical Questions** button. This will bring up a list of questions that you should answer. As each question is processed, you will first be able to type notes and then you can click if the inmate answered **YES, NO, or REFUSED to answer.** When finished, click **Save** at the bottom of the window.



List of Medical Questions:

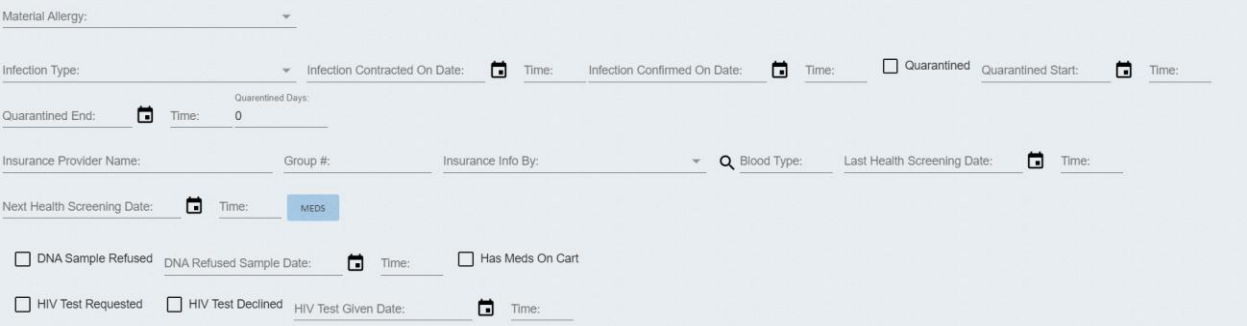
- Are currently taking a prescription medication?
- Do you understand medical care can be refused at any time?
- Have you recently taken or been prescribed medication for emotional problems?
- Have you ever experienced DTs or other serious withdrawal from drugs or alcohol?
- Have you ever suffered a head trauma that required hospitalization?
- Do you have any food or medication allergies?
- Are you diabetic?
- Are you pregnant?
- Do you understand to receive medical care, a Sick Call Form must be completed?
- Do you understand to notify the staff immediately if you need to request emergency medical care?
- Do you give consent to medical care and the release of medical information?
- Is there any reason you should be separated from another inmate while you are here?
- Have you understood all the questions I have asked you?
- Is there any other information you want us to be aware of at this time?
- Does the booking officer feel the inmate is incapable of understanding these questions? (If yes, notify supervisor)
- Does the booking officer feel the supervisor should be notified at this time? (If yes, notify supervisor)
- Does the inmate's behavior indicate a possibility of self harm? (If yes, call Triage)
- Are you allergic to Peanuts?
- Do you have a gluten sensitivity?

Checkboxes



Below the buttons, there are several check boxes for information on allergies, health conditions, medical care and more. These boxes relate to allergies, insurance/care, and current medical statuses such as being diabetic or being pregnant.

Medical Fields



These fields are for the rest of the medical information. There are also several drop-down option fields that can be filled in to ensure proper medical care. Medical personnel will complete an official record, but filling out this tab as thoroughly as possible is *very* important. Click "**Save"** after filling out.

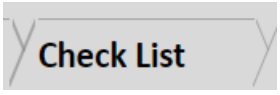
First Six Tabs Summary

IMPORTANT: At this point you should have filled out the first six tabs: **Bio/ID, Arrest/Bond, Family Contact, Employer, Education, Medical**. Make sure to view the **Checklist** tab to ensure you have finished everything necessary for Intake before exiting the booking.

Finish these six tabs:



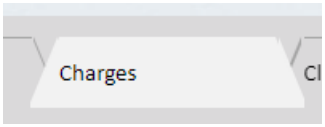
Ensure you finish the checklist for intake underneath the *Checklist* tab:



7 Check List Items

Item Description	Completed Date	Completed By	Canceled Date	Canceled By	During Detention
FINGER PRINTS					Yes
INMATE INITAL PHONE					Yes
STATE / LOCAL CHECK					Yes

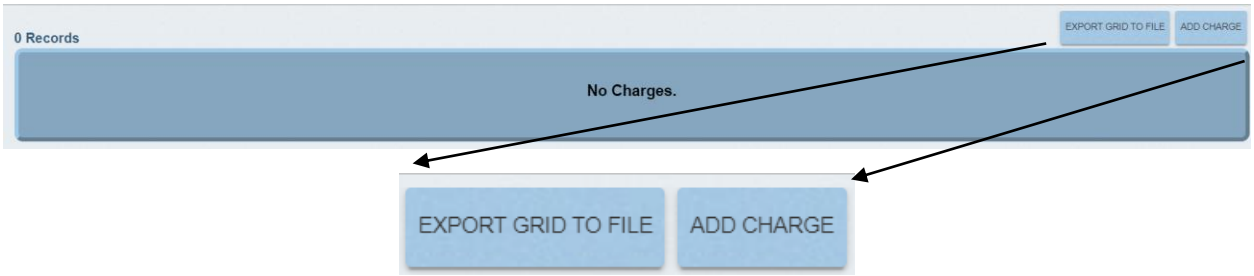
Charges Tab



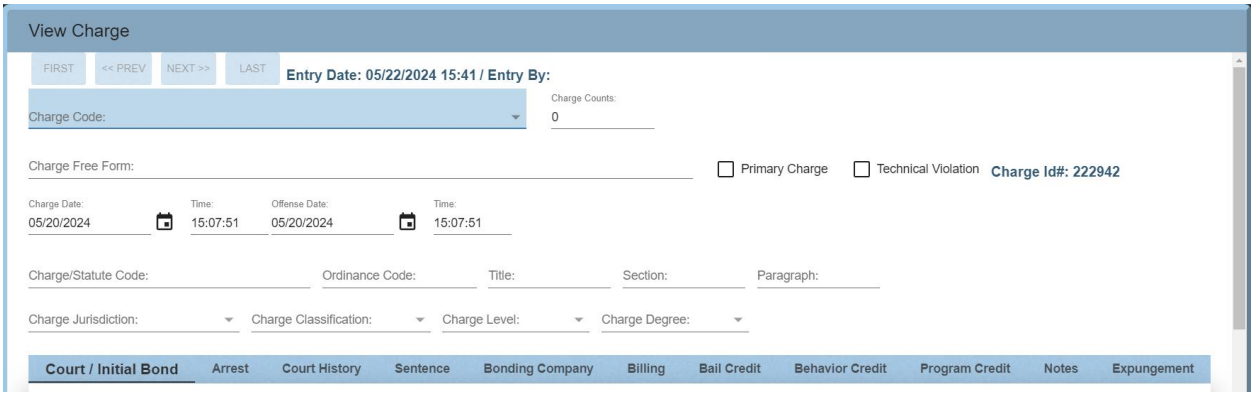
The **Charges Tab** is where the charges related to this booking are entered. You will enter the charges and information related to each charge. If you are using the "per charge" sentencing method, you will also enter the sentence length for each charge. Use the **Add Charge** button at the far right to add a charge.

In this section…

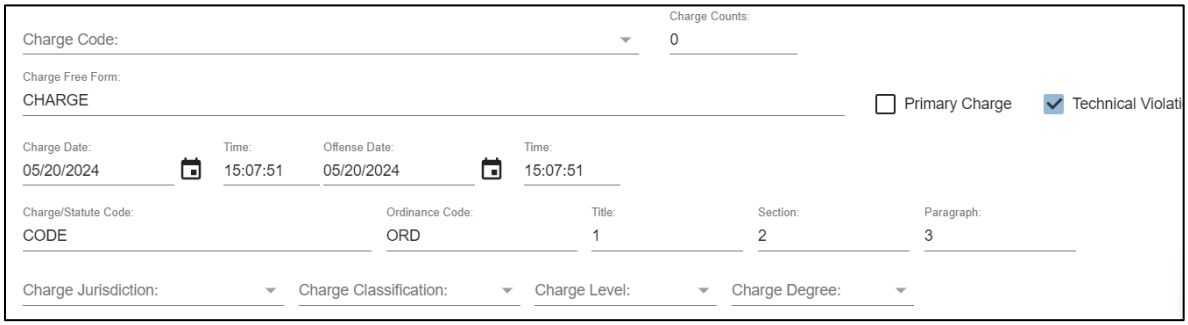
Adding Charges	Bail Credit
Court / Initial Bond	Behavior Credit
Arrest (Charge)	Program Credit
Court History (Charge)	Notes (Charge)
Bonding Company	Expunge Charge



When you click **Add Charge,** you will be asked if you are sure you want to add a charge. Click **Yes** and the below screen will appear.



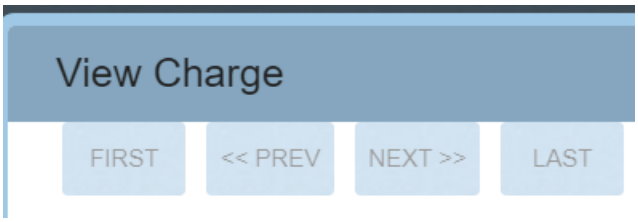
Enter the charge details into the fields and click **SAVE** to avoid losing work. Then reopen the charge by double-clicking it and continue editing.



Fill in as much information as possible: more can be added later as needed. There is a list of headings in the middle of the screen and each heading is a button that opens new details on Arrest, Court History and more.

Additional Information on the Charges Tab

Multiple charges can be added. Click **Save** at the bottom of this screen after entering the information for each charge and use the **Exit** button when done. You can also use the navigation buttons at the top left of this screen (**First, Prev, Next, Last)** to move between the charges quickly without having to close the entire screen.

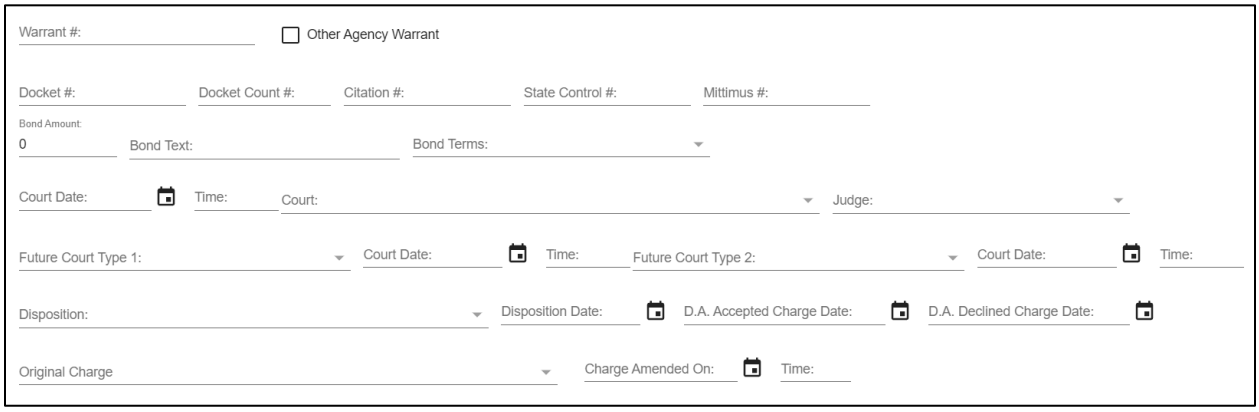


If you have trouble seeing everything on this screen, you should scroll down or zoom out in your browser settings on the right of your screen.



Court / Initial Bond

Record information related to the court warrant, initial bond, and disposition here.



Arrest

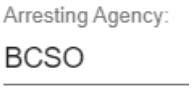
The **Arrest** heading is for information about the arrest. The **Arresting Agency** dropdown is especially important because it lets you record the original arresting agency for this charge even if the prisoner is transferred to another agency. When using Board Billing in iSOMS, the **Arresting Agency/Department Responsible** field under the Arrest/Bond tab is used to determine who is responsible for the inmate, but this is one of the fields available for the original arresting agency. See the *Arrest/Bond Tab* on page 77 for more information.

Under ARREST/BOND:



Field for current department responsible for the inmate

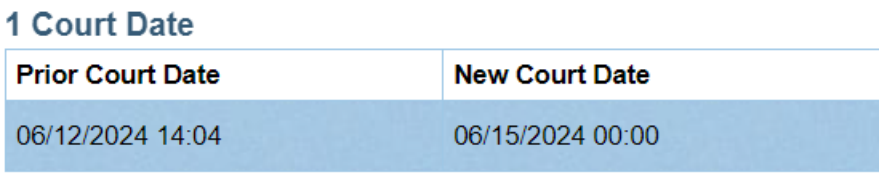
Under Arrest Heading in Charge:



Field for arresting agency on each charge

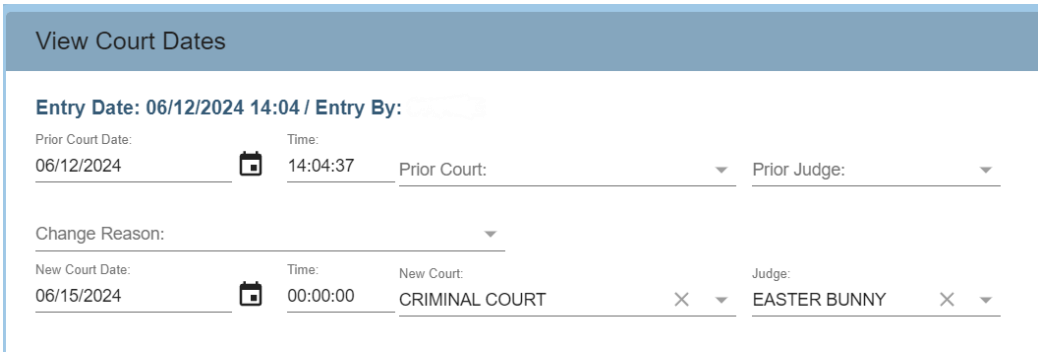
Court History

The **Court History** tab allows you to add court dates and information about them to the table. Double-click current court dates to edit them.



Click **Add Court Date** to add a new court date. If the court date is rescheduled, you can add information about any prior court date and the reason for the date change. After that you can add a new court date.



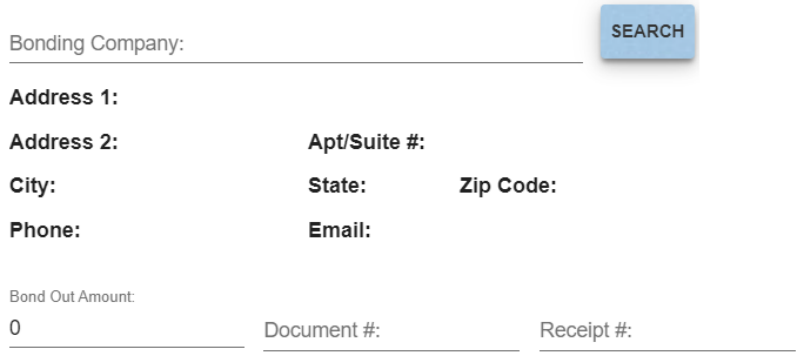




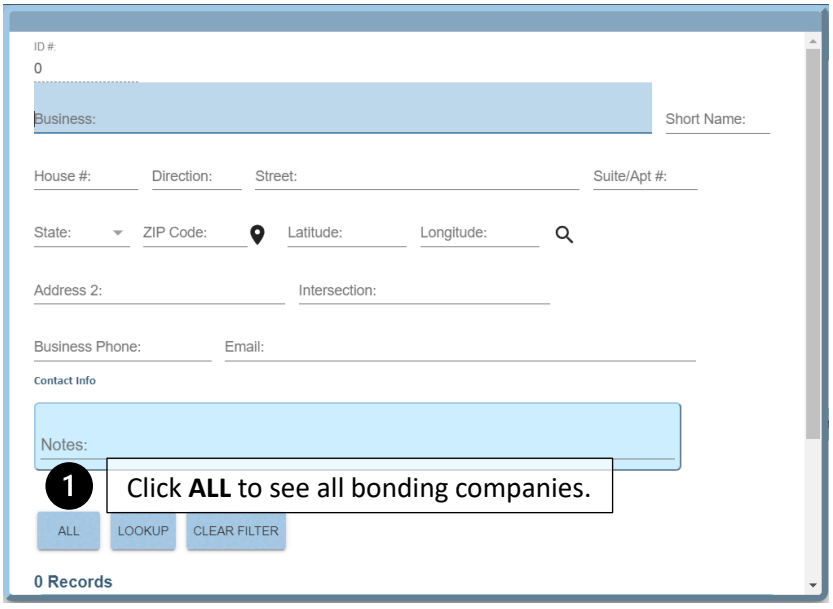
The **Sentence** heading you see here is used for the sentencing option when sentencing by charge. Sentencing will be covered in the *Sentencing* section on page 230.

Bonding Company

The **Bonding Company** tab lets you add a bonding company for the charge. At the bottom of the window are fields to enter the Bond Amount with document and receipt number. Press **Search** to choose the bonding company.



This will open the search screen. You can search by the name of the company or click **All** to see a list of bonding companies entered. Additional companies that are not present on the list will have to be added by a Super User.



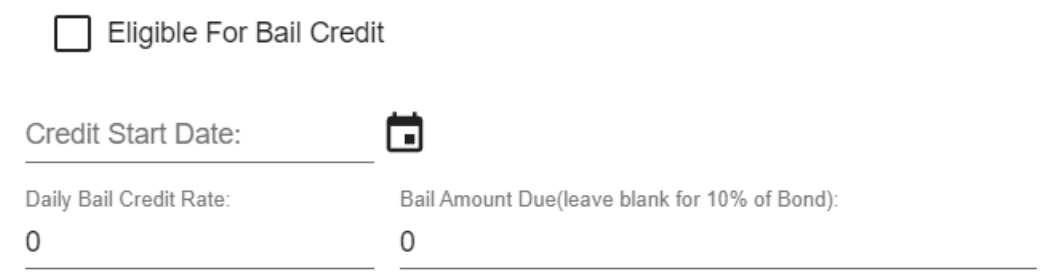


Billing

This tab is not typically used for automated billing. See *Board Billing* on page 246 for more information on automated board billing.

Bail Credit

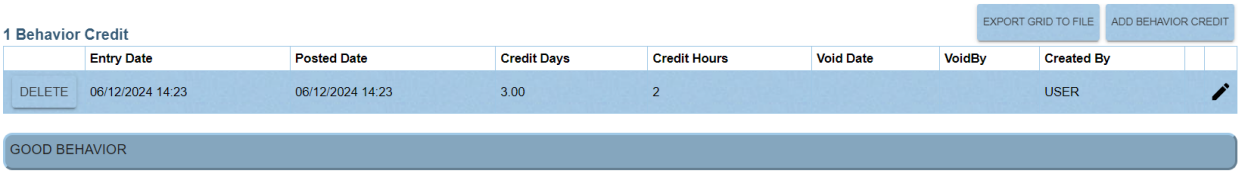
Use the **Bail Credit** heading if the inmate is eligible for bail credit to be applied.



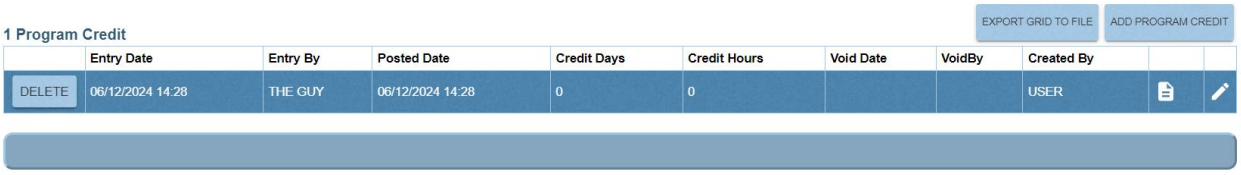
Behavior Credit Program Credit

Use the **Behavior Credit and Program Credit** headings for logging information on behavior or program credit. You can see any credits that have been added for this charge here. You can double-click any entry on the table to view it.

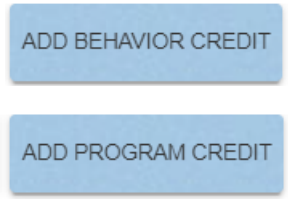
Behavior Credit Screen:

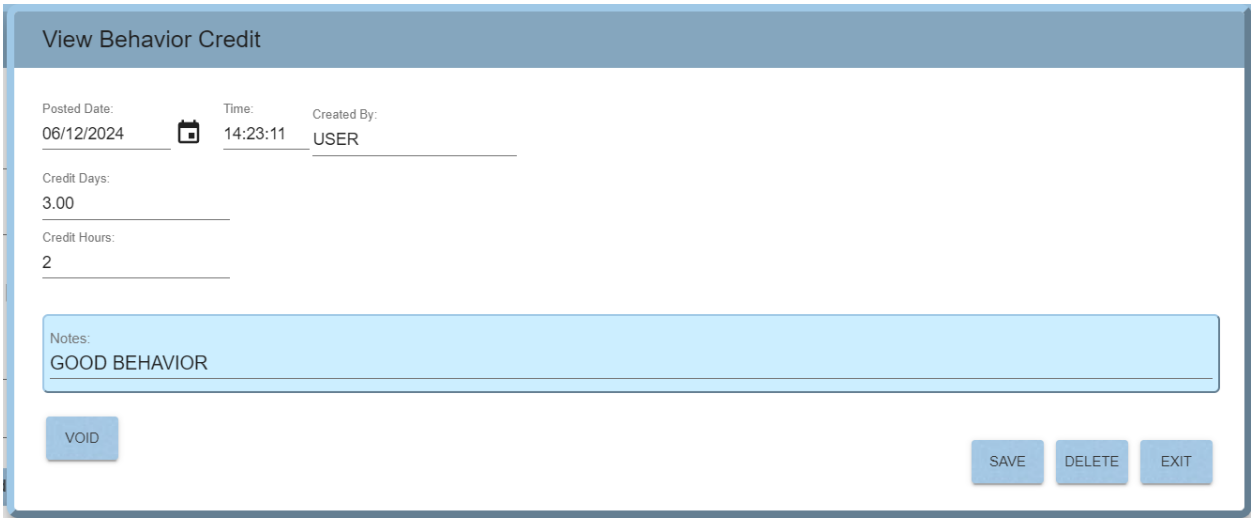


Program Credit Screen:



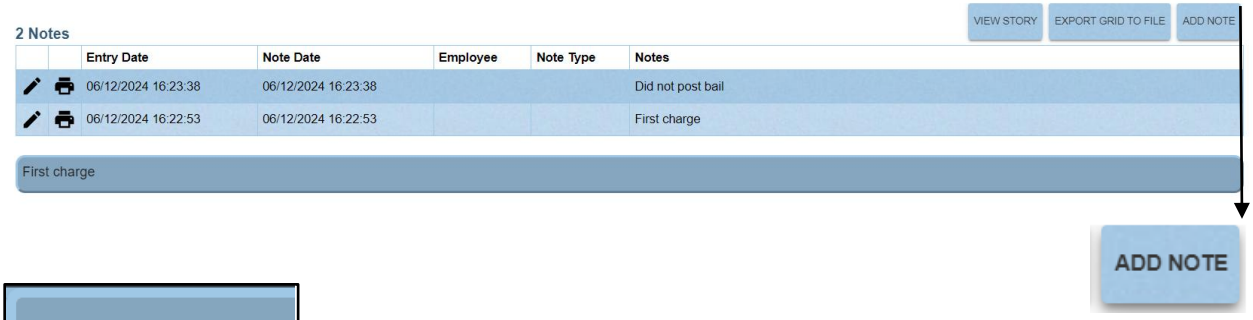
Click **Add Behavior Credit or Add Program Credit** to add a new credit. Input the credit days, credit hours, and any additional notes in the window.







The **Notes** heading allows you to add various notes to this charge. Click **Add Note** to add a new note to this charge. Double-click a current note to edit it.



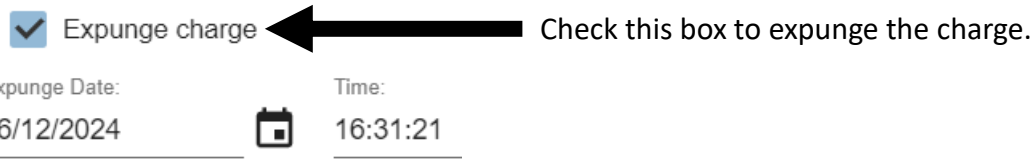


View Story allows you to see a compiled list of all the notes made for this charge. This is useful if there are several notes available.



Expungement

The **Expungement** heading allows Agency Super Users and Booking Super Users to expunge this charge. Only users with these security privileges can see charges once they have been expunged – all other employees will not see the charge if the **Expunge Record** checkbox is checked.



Users with the proper security privileges will see all charges, including expunged charges:

3 Charges

Expunged	Charge Code	Charge_Descrpition
Yes	512	AGGRAVATED LOANSHARKING
	14:324	ABANDONING OR DISCARDING ICE BOXES OR OTHER AIR TIGHT CONTAINERS
	15-104	WRONG WAY ON ONE WAY STREET

Users without expungement security privileges will *not* see the expunged charges:

2 Charges

Expunged	Charge Code	Charge_Descrpition
	14:324	ABANDONING OR DISCARDING ICE BOXES OR OTHER AIR TIGHT CONTAINERS
	15-104	WRONG WAY ON ONE WAY STREET

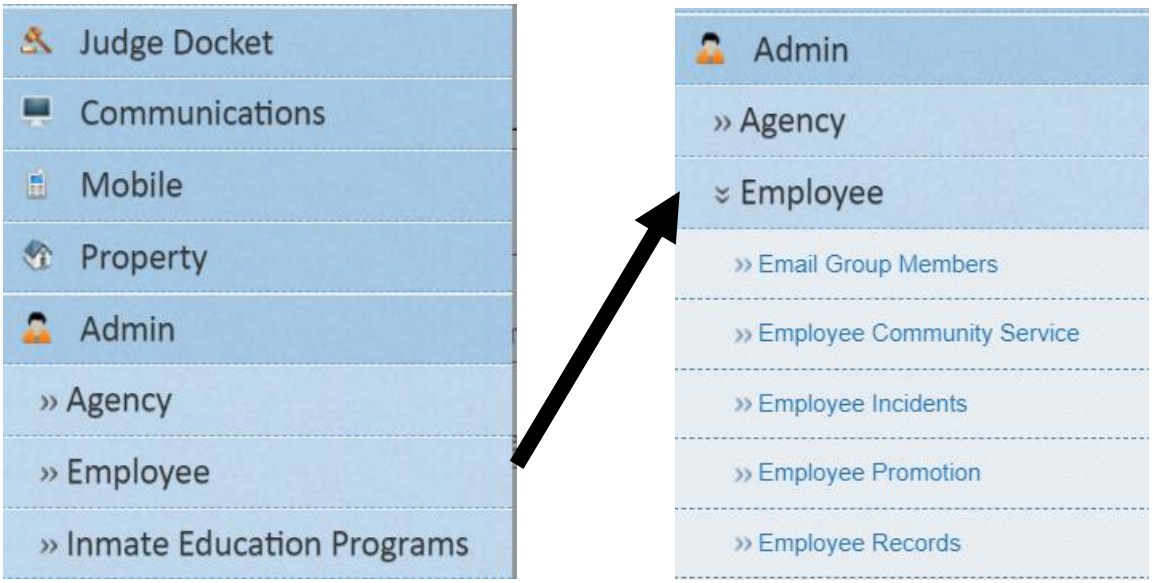
If the charge was improperly or accidentally expunged, a Super User or an employee with expungement permissions. can uncheck the box and the charge will be visible to all users again.

Adding Expungement Permissions

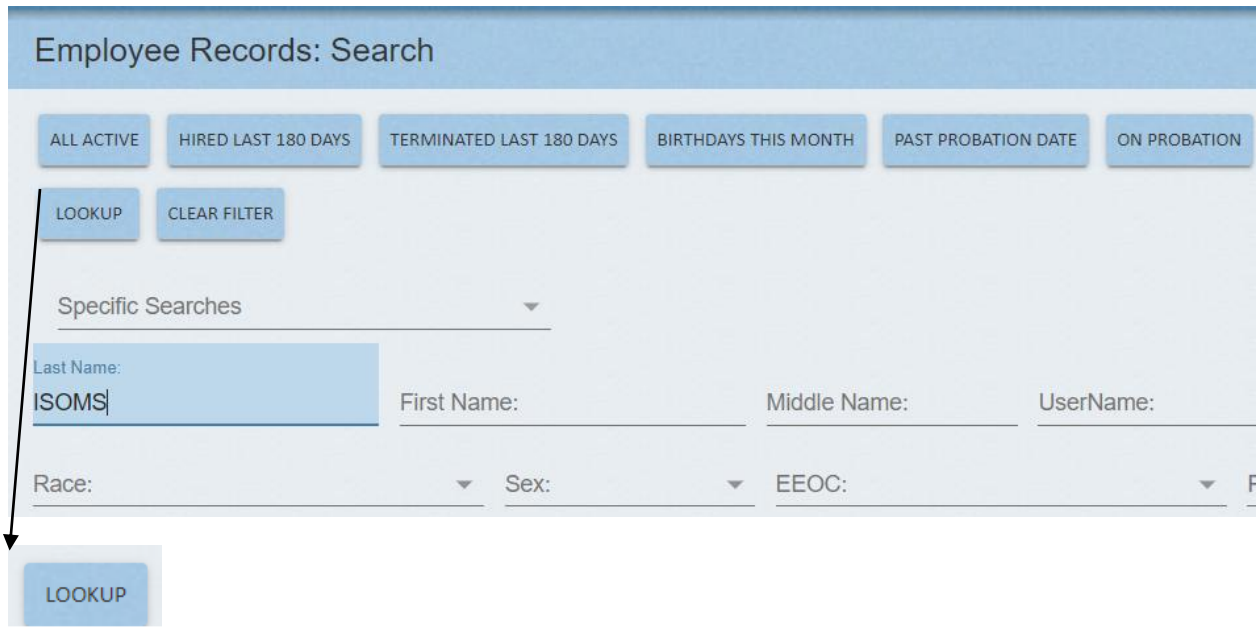
A Super User can give an employee expungement permissions, so they can see and expunge records.

To add expungement permissions, navigate to:

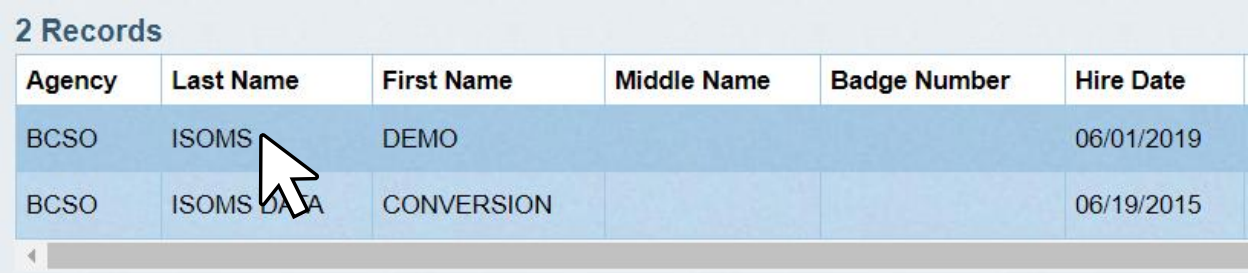
Admin → Employee → Employee Records



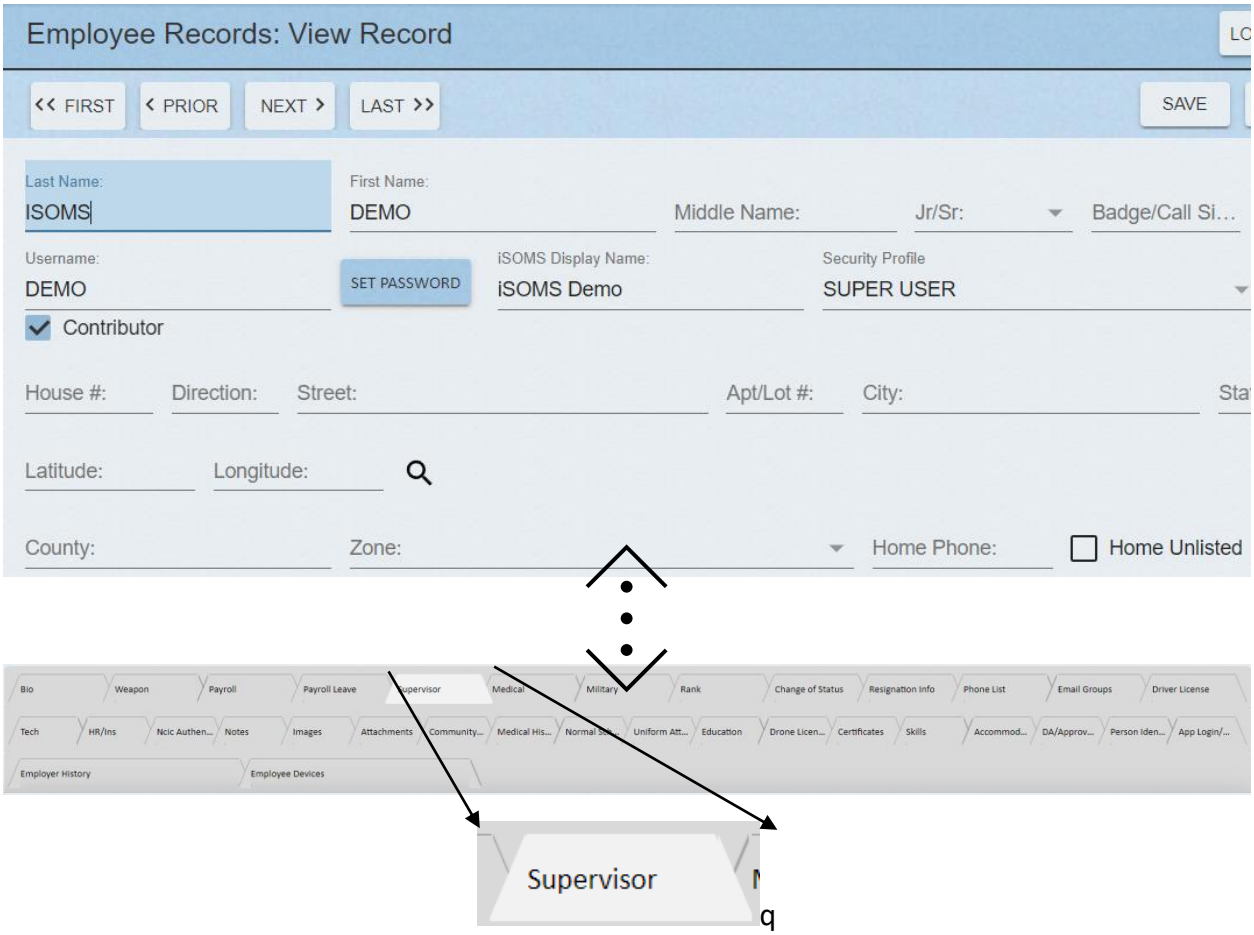
This will open the **Employee Records Search Screen**. Enter any search parameters you need to find the employee to whom you are adding Expungement Permissions, and then click **LOOKUP.**



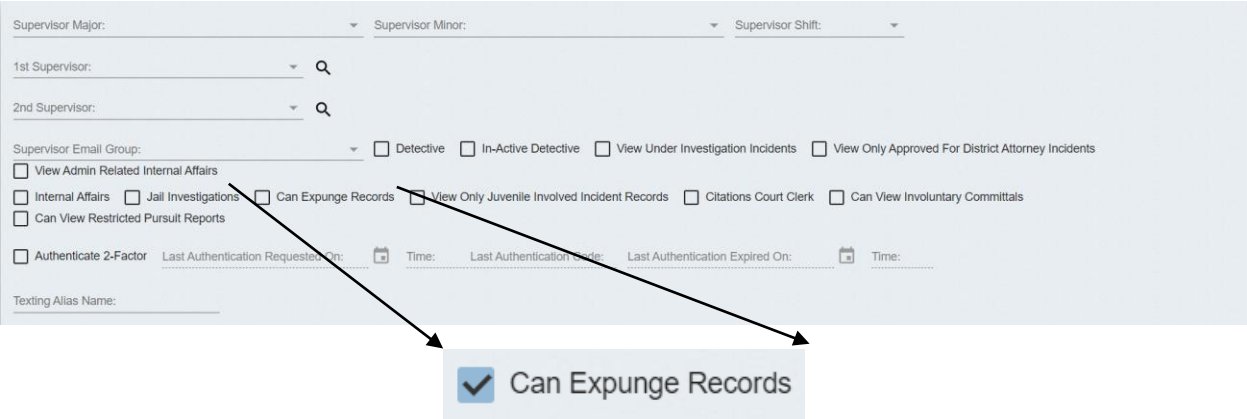
Double-click on the employee you are looking for in the list:



This will open their **Employee Record**. Scroll down and click on the **Supervisor** tab:

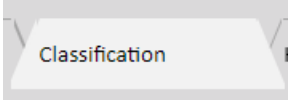


When you click on the Supervisor tab, you will see the below screen. Find the **Can Expunge Records** checkbox and click it. Now this employee can view expunged records and expunge charges and records.

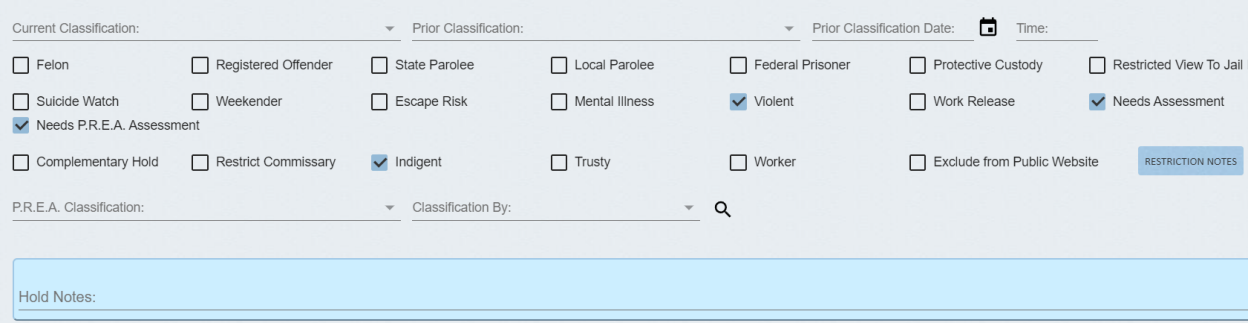


See the *Permissions* section of page X for more information on Super Users and permissions.

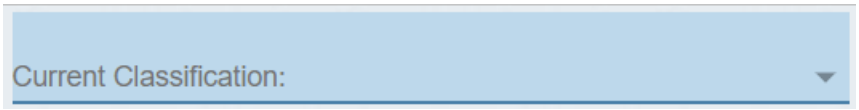
Classification Tab



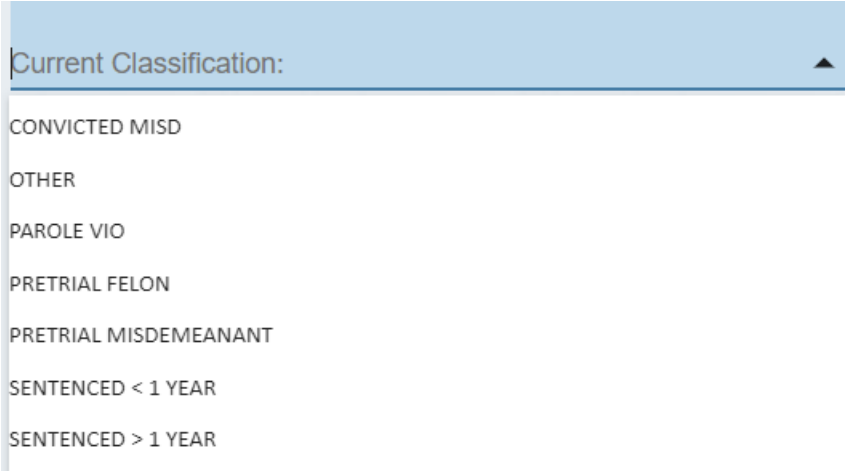
The **Classification** tab is where classification information for this inmate can be entered, such as if the inmate needs an assessment, is violent, has a mental illness, or the like. Classification is used for a variety of identification functions. One of the main uses is for the facility report, such as state facility reports in Tennessee or other states. Many of the fields will be explained below, but for more detailed information, see the *Facility Report and Classifications* section on page 264.



Classification Field Explanations

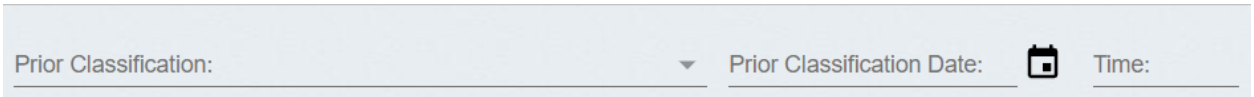


Use the **Current Classification** drop-down menu to select what classification this inmate is currently designated.

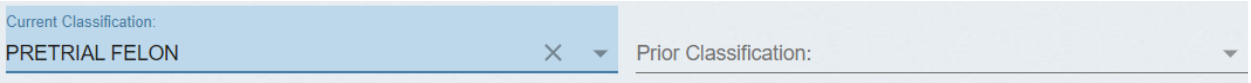


Typical options include Misdemeanant, Pre-trial, Parole Violator, etc.

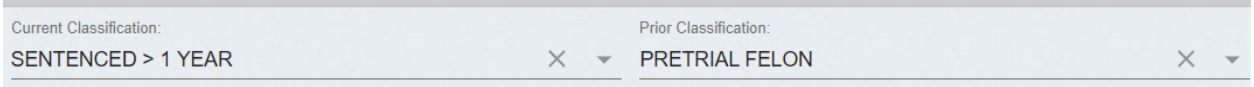
This will be used in facility reports, etc. for identifying what the inmate's current classification is.



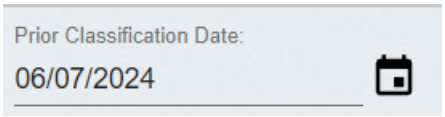
Use the **Prior Classification** and **Prior Classification Date** fields to identify what the inmate's previous classification was and when the switch to the current classification occurred. For example, if you had an inmate was a pre-trial felon before being tried, then the **Current Classification** would be *Pretrial Felon*:

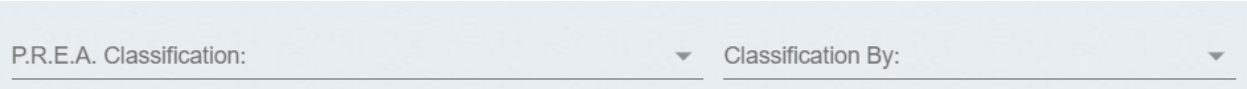


If they were tried, convicted as a felon, and sentenced to more than a year, the **Current Classification** would switch to *Sentenced > 1 Year* and **Prior Classification** would be *Pretrial Felon*:



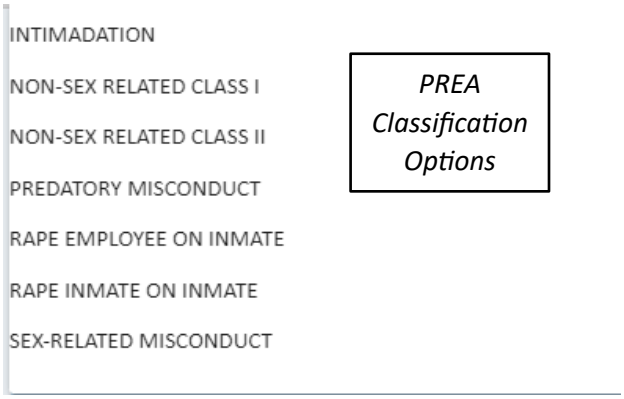
Prior Classification Date should be put as the date and time the classification changed, so iSOMS can track when the change occurred for reports.





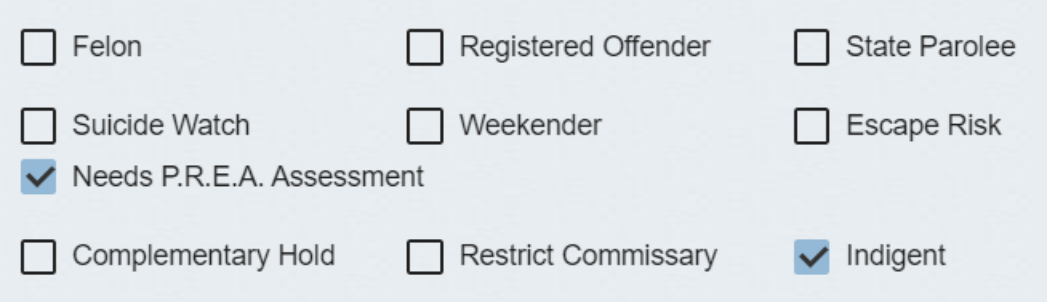
PREA Classification is for classifying according to the P.R.E.A assessment.

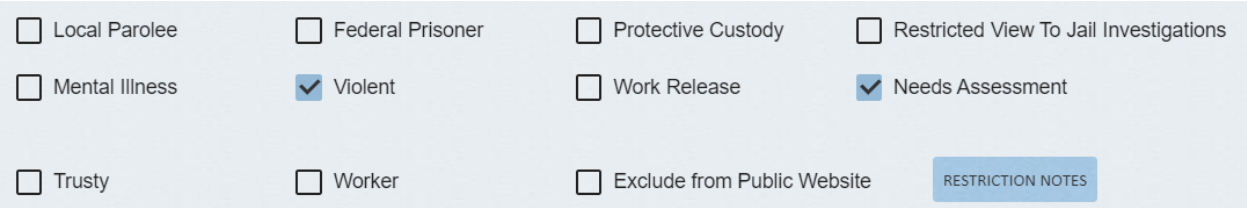
The **Classification By** will fill automatically with the person who inputs the **PREA Classification.**



PREA Classification Options

Selected Classification Checkboxes

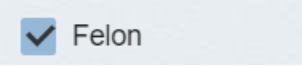




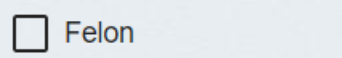
Use the checkboxes to mark what classifications and identification that should be used for this inmate. Be aware of the following checkboxes:

Felon

This relates to the Pre-Trial column in the facility report.

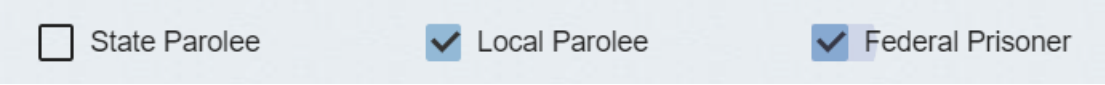


If this box is checked, the inmate will be classified as a felon.



If this box is NOT checked, the inmate will be classified as a Misdemeanant.

State Parolee / Local Parolee:



iSOMS uses the State/Local to put in the correct sub-column for reports.

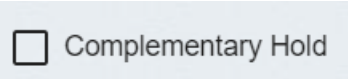
If you check Local, they will be classified as Local. The default is that they are a State Parole Violator.

Exclude from Public Website

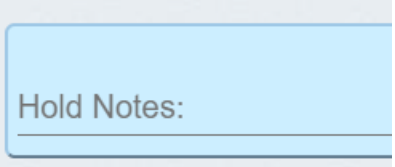


This will block the inmate's record from the public website. If this is done, you can add **Restriction Notes** for future reference.

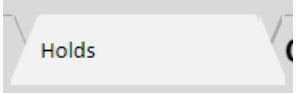
Complementary Hold and Hold Notes Field



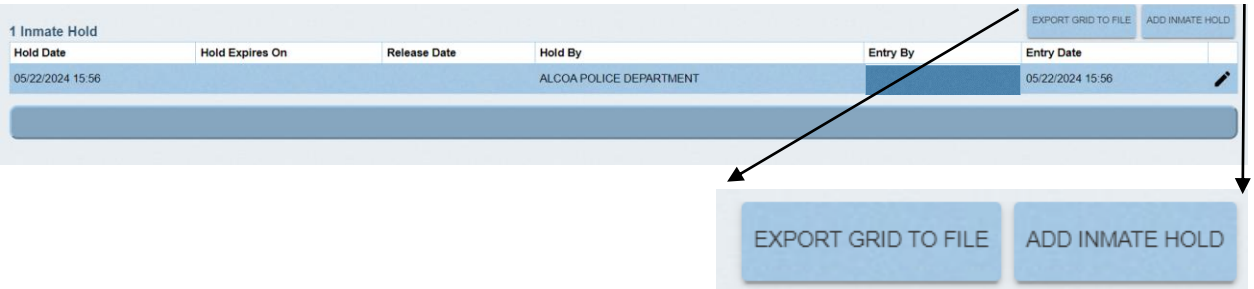
Mark this inmate as a complementary hold for another agency. The next tab is the **Holds** tab which can also be used for more detailed information.



This field allows you to add hold notes.

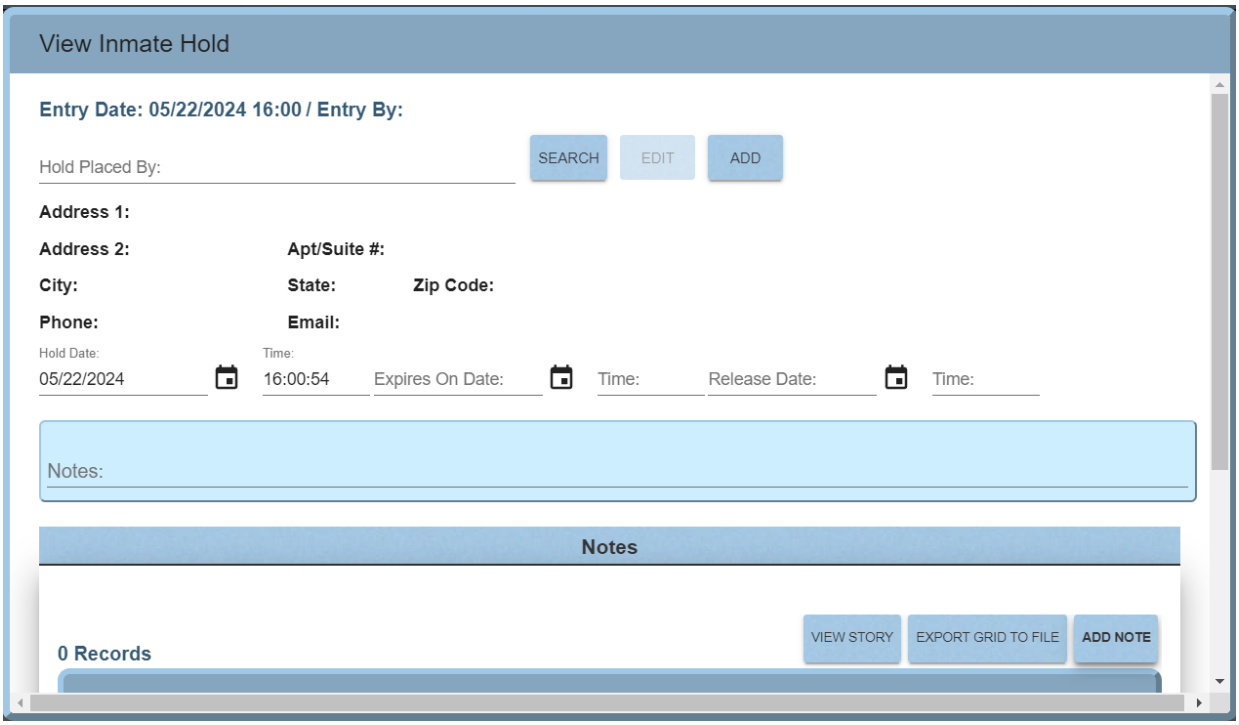


The **Holds** tab is where you can add new holds or see any current holds for this. If there are existing holds, they will be displayed. You can double click on the hold to view it.



Adding an Inmate Hold

To add a new hold, click **Add Inmate Hold** in the far right. If you click **Add Inmate Hold**, you will be asked “are you sure you want to add a new inmate hold?” Click **Yes** and then the following screen will pop up.

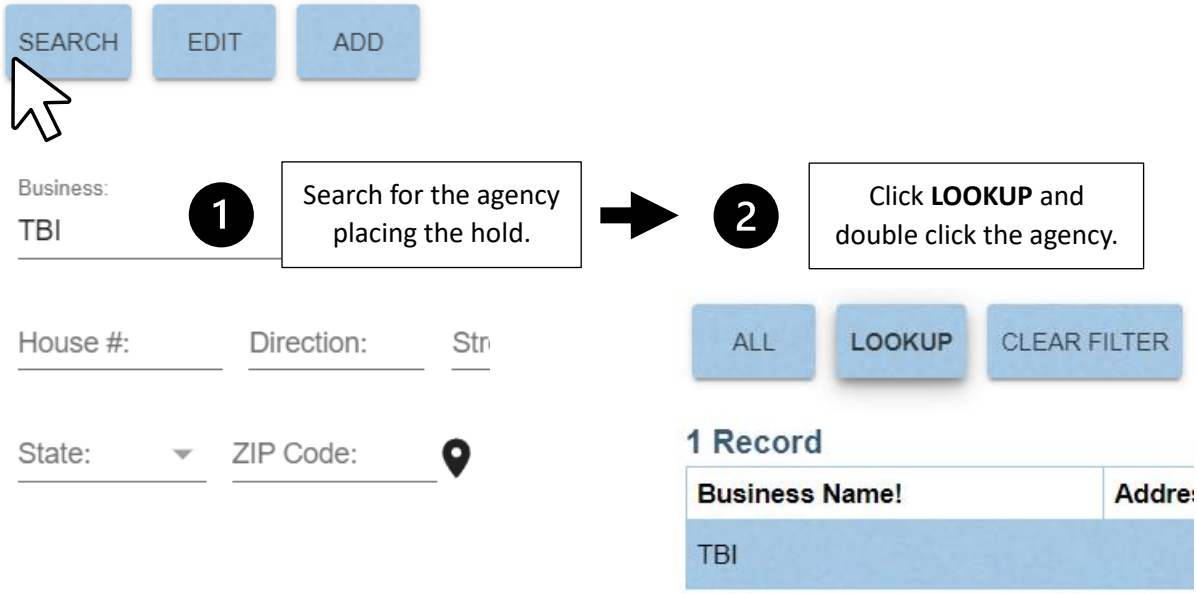


Continued on the next page

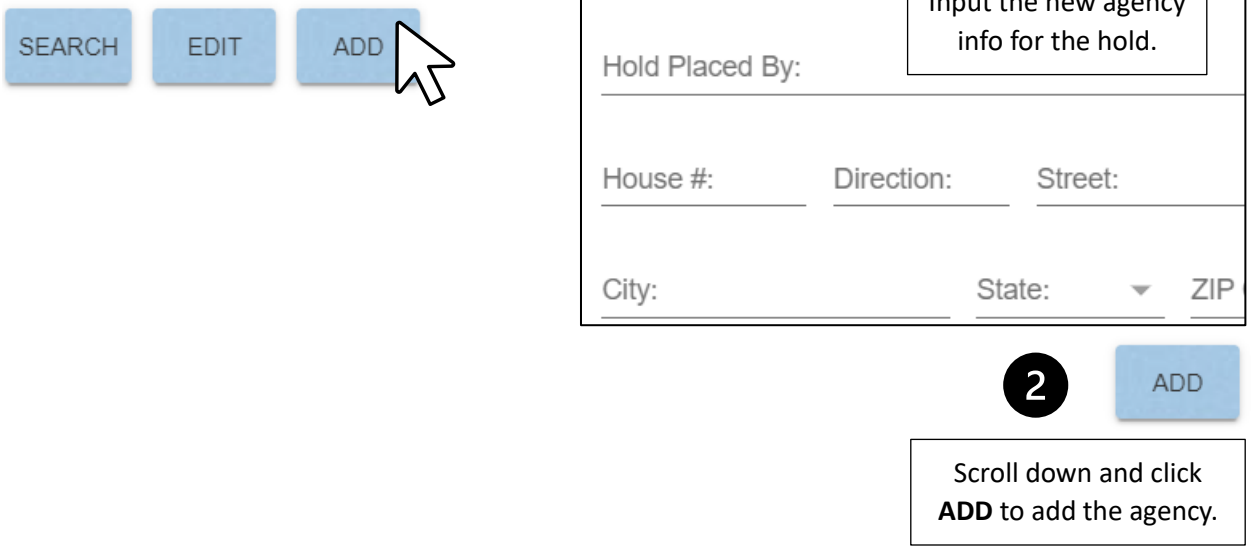
Corrections Manual

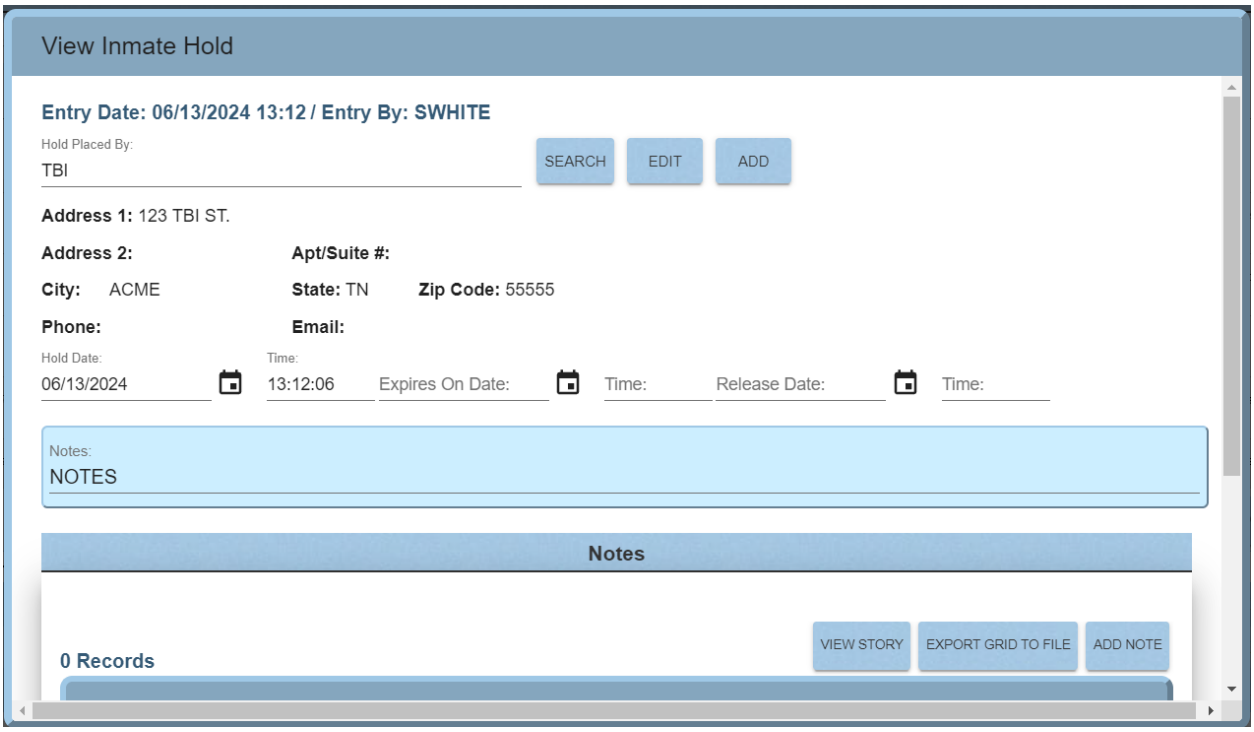
First, select the agency that placed the hold by using the **Search** or **Add** buttons.

Use **Search** if the agency has already been inputted before.

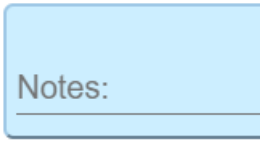


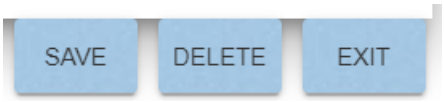
Use **Add** if you need to add a new agency and input the information for the new agency, then click **Add** at the bottom of the new window**.**





Enter any notes related to this hold and click **Save** to save the hold.





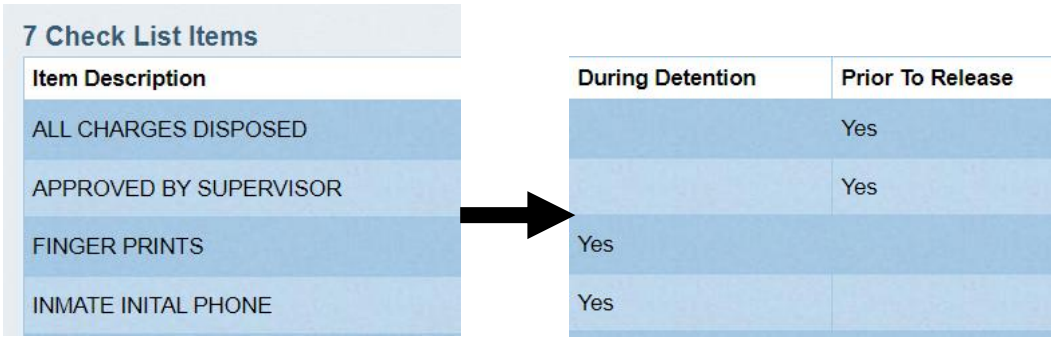
Check List Tab



The **Check List** tab is where the required check list items for every booking can be found. This is an automated list controlled through company/agency set-up. This list will remind you what needs to be finished during detention and prior to release.

In this section…
Completing Check List
Adding New Items to This Booking
Adding New Items to All Bookings

You need to go through the check list when you start a booking and when you go to release an inmate. You will see a list of items. There are two noteworthy columns to the right: *During Detention* & *Prior to Release. During Detention* items should be finished during the booking, while *Prior to Release* should be finished before the inmate is released. Some items may not be listed under either of these, so you should do those items as appropriate.

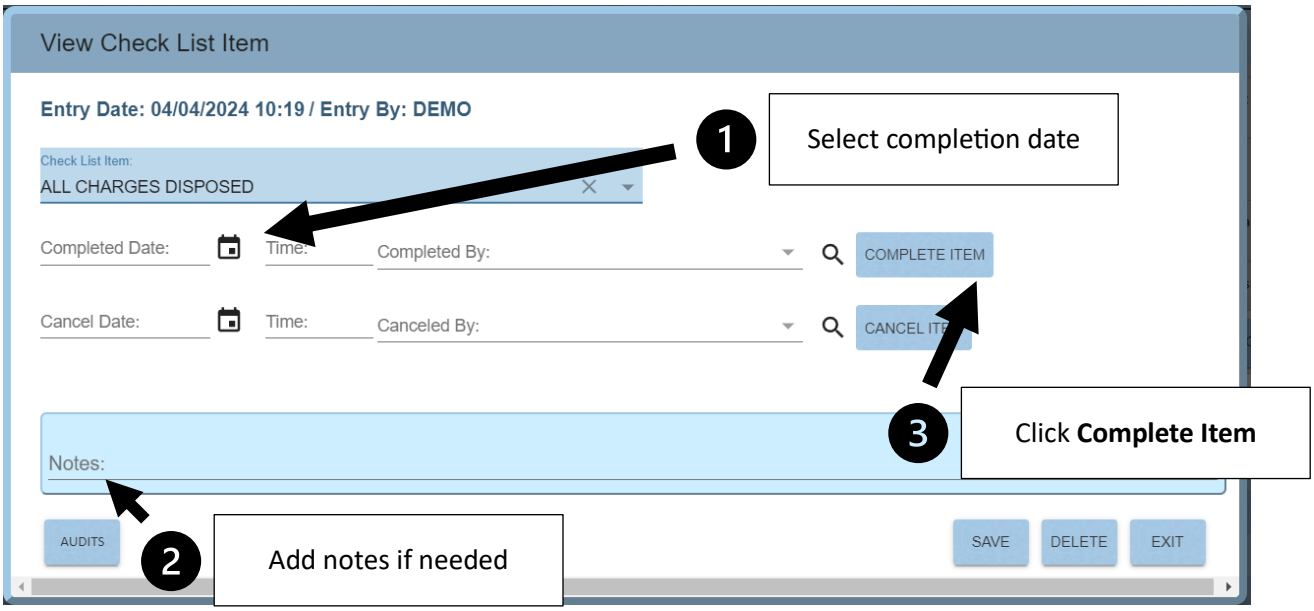


Completing Items

To complete single check list items, click on the pencil icon at the far right of the field for the item you are completing.



After clicking the pencil icon, you will get the following screen. You can put in the completion date (usually today) and add notes if necessary. Then click **COMPLETE ITEM**.



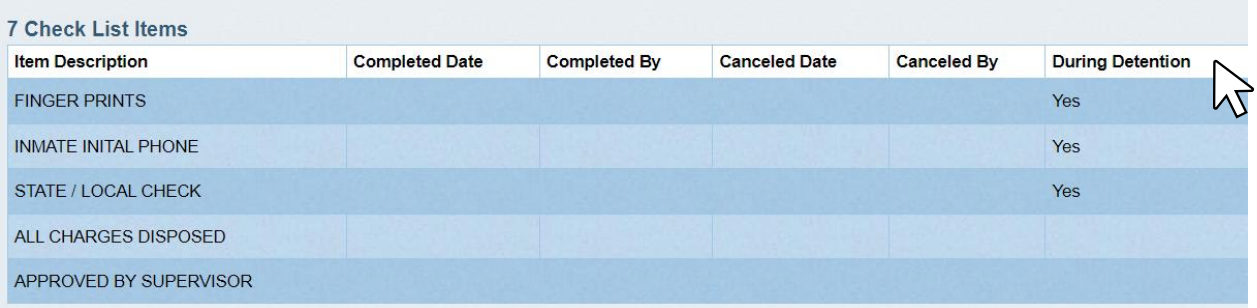
You also have the option to complete all items at once. If you click **Complete All,** you will be asked if you are sure you want to complete all the items. If you choose yes, then the date, time, and user who is completing the checklist will fill in.



TIP: Many of the list items are typically for release, so you should usually use **Complete All** when you are about to finish all the items before release.

Detention Example:

As an example, if we click the *During Detention* header once or twice, it will sort the table for us, so the items to be done first will be sorted to the top:



7 Check List Items

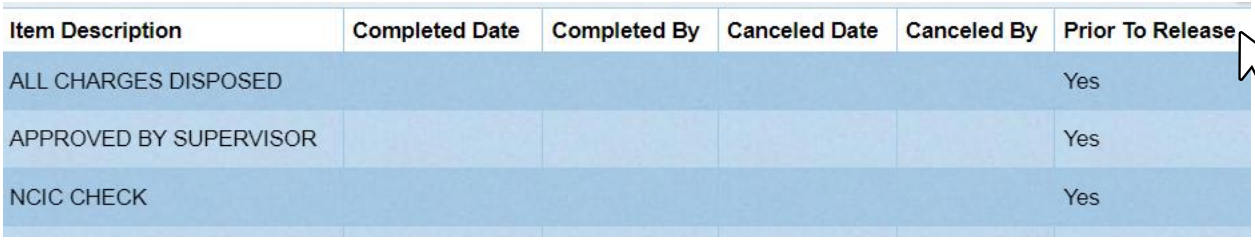
Item Description	Completed Date	Completed By	Canceled Date	Canceled By	During Detention
FINGER PRINTS					Yes
INMATE INITAL PHONE					Yes
STATE / LOCAL CHECK					Yes
ALL CHARGES DISPOSED					
APPROVED BY SUPERVISOR					

Now that we can see what should be done first, we make sure we do each item and check each one off.

1. Fingerprint the inmate
2. Give the inmate the initial phone call
3. Do a local and state check on the inmate's background.

Release Example:

When it comes time to release the inmate, if we click the *Prior to Release* header once or twice, it will sort the table for us, so the items to be done before release will be sorted to the top:



Item Description	Completed Date	Completed By	Canceled Date	Canceled By	Prior To Release
ALL CHARGES DISPOSED					Yes
APPROVED BY SUPERVISOR					Yes
NCIC CHECK					Yes

Then we simply do the checklist items necessary before release:

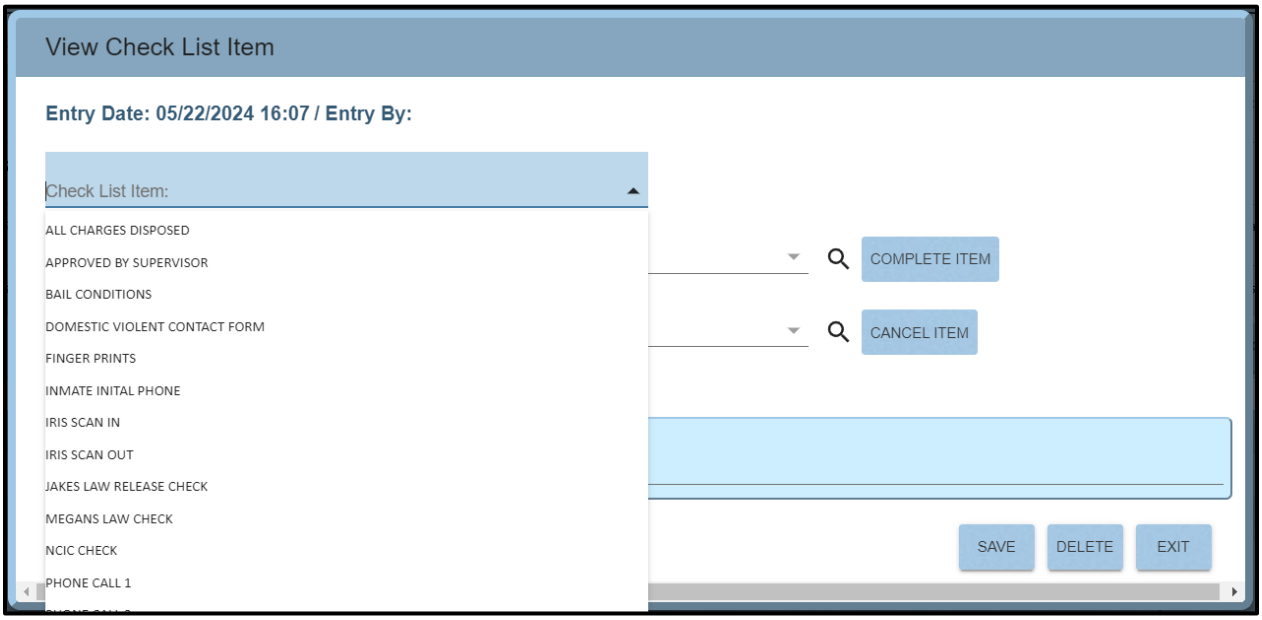
1. Make sure all charges are disposed.
2. Do an NCIC check.
3. Get a supervisor to approve the release.

Making New Checklist Items for This Booking

To add a new checklist item for *only this booking*, click **Add Check List Item.** This will open a new window to add an item. Using this option may be helpful if different officers release the inmates and you need to make sure something specific gets done for this inmate before they are released.



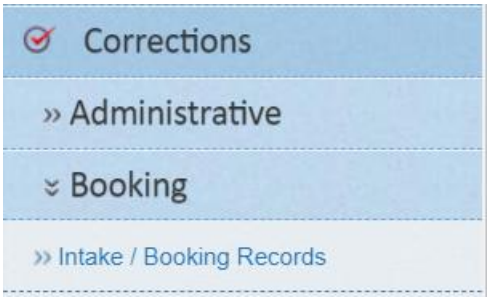
Any new check list items added here will *not* be added to the automated list that loads in for every booking. When you choose an item, you will use the drop-down list **Check List Item**. The options are controlled through *Maintain Files* and cannot be freeform.



Making New Checklist Items for All Bookings

A Super User can make new checklist items for all bookings so that booking officers are aware of the procedures necessary to book or release someone. The first thing you should do is navigate to the Booking Module via:

Corrections → Booking → Intake/Booking Records

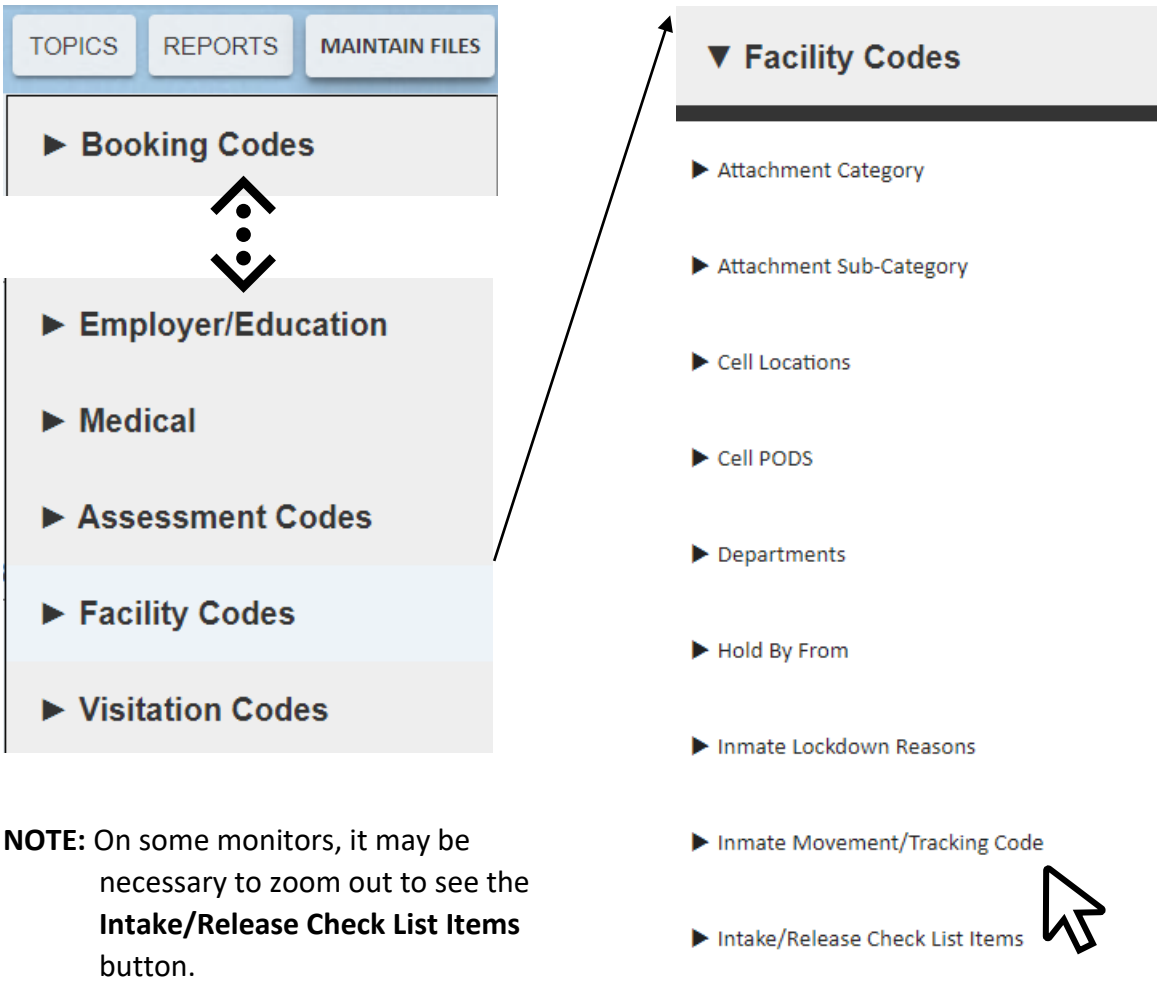


Corrections Manual

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

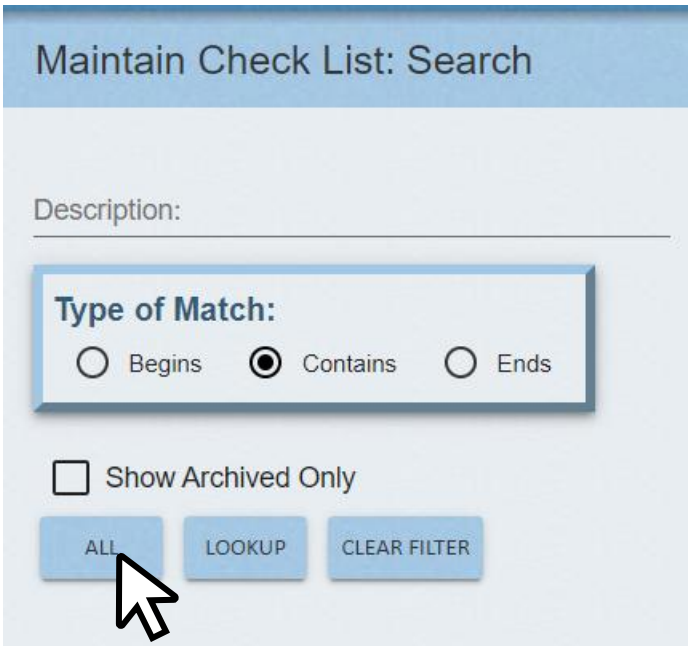
Maintain Files → Facility Codes → Intake/Release Check List Items





NOTE: On some monitors, it may be necessary to zoom out to see the **Intake/Release Check List Items** button.

This will open the **Maintain Check List** Screen. Click **ALL** to see all the checklist items.

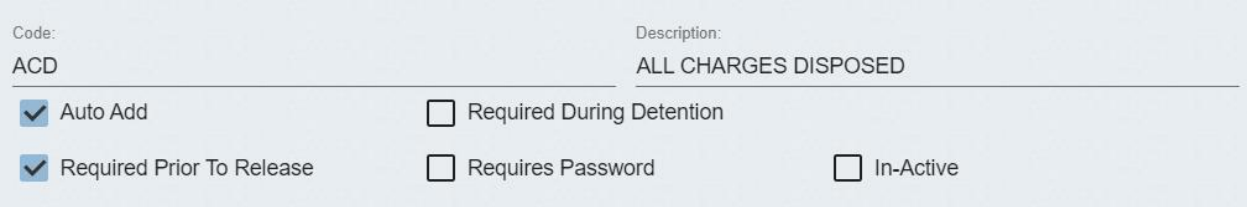


Here you can see all of the checklist items that iSOMS currently has for your agency. The *Auto Add* column is to automatically add the item to every new booking checklist. *Required During Detention / Prior to Release* let you mark to complete the item during detention or before release as appropriate.

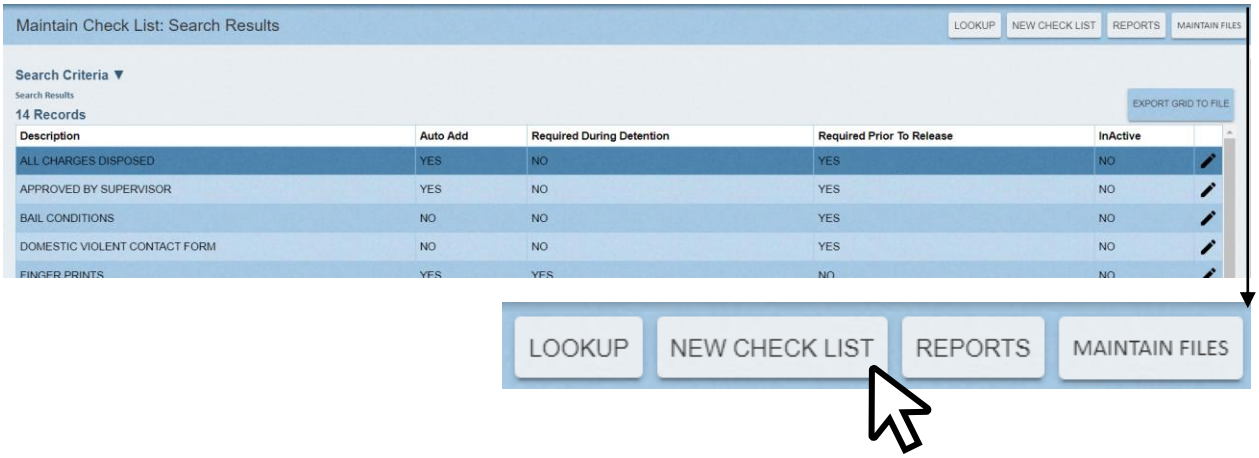
14 Records

Description	Auto Add	Required During Detention	Required Prior To Release
ALL CHARGES DISPOSED	YES	NO	YES
APPROVED BY SUPERVISOR	YES	NO	YES
BAIL CONDITIONS	NO	NO	YES
DOMESTIC VIOLENT CONTACT FORM	NO	NO	YES
FINGER PRINTS	YES	YES	NO
IRIS SCAN IN	NO	YES	NO
IRIS SCAN OUT	NO	NO	YES
JAKES LAW RELEASE CHECK	NO	NO	NO
MEGANS LAW CHECK	YES	NO	NO
NCIC CHECK	YES	NO	YES
PHONE CALL 1	NO	YES	NO
PHONE CALL 2	NO	NO	NO
INMATE INITAL PHONE	YES	YES	NO

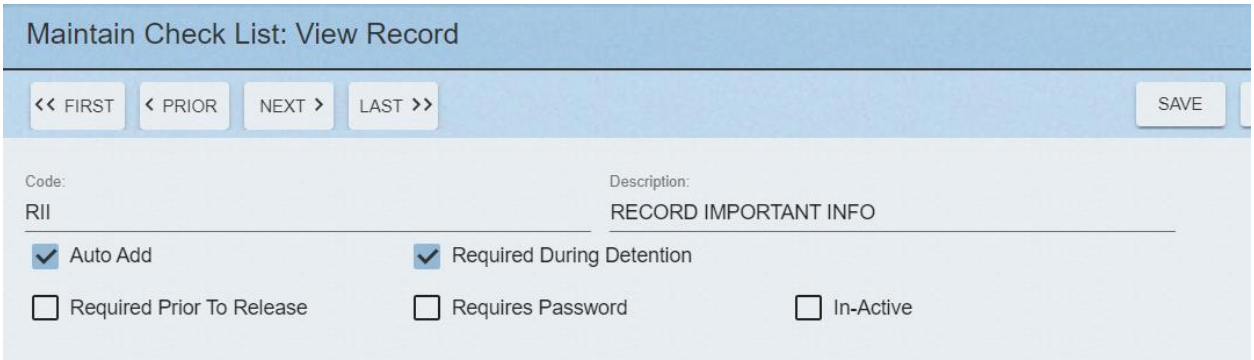
To edit a checklist item, simply double click it, and change the settings as appropriate.



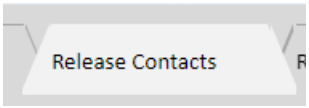
To add a new item, click **New Check List** in the upper right corner. This will open the New Check List Item screen.



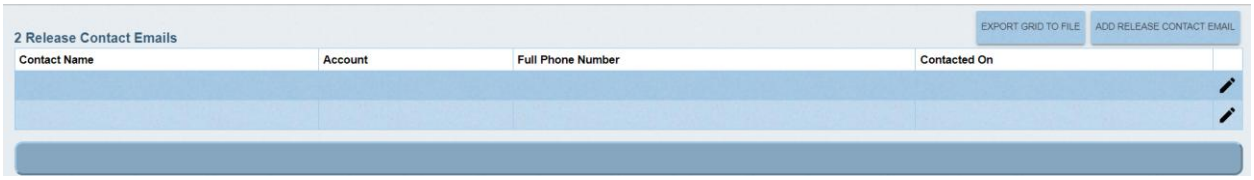
Add a code, description, and click then check the boxes if you want it to auto add or be required during detention or release. Then click **SAVE** near the top of the screen.



Release Contacts Tab

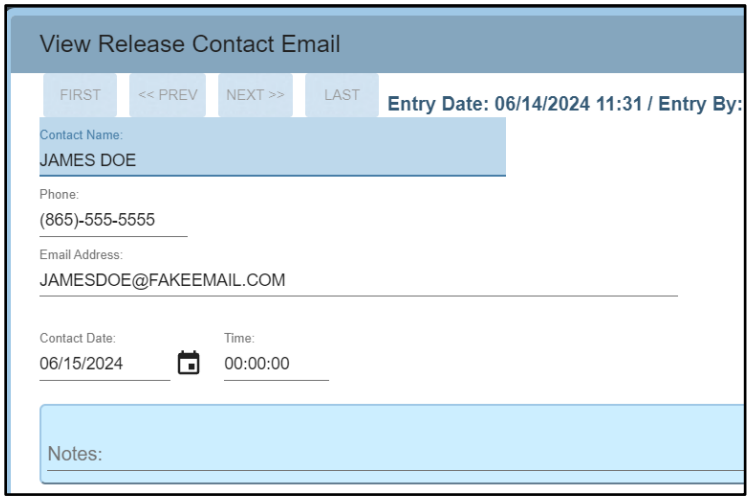


The **Release Contacts** tab is where you can enter information for contacts that need to be notified when an inmate is released.



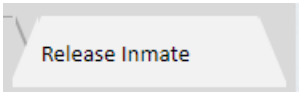
This is **not** the same as victim notification – there is a separate tab for victim notification and the contacts in this tab are *not* notified automatically. Examples of release contacts are another agency, parole, or probation. When you add a new contact, you can enter their name, phone number, email, and notes. You can also add the date and time when contact is made. Any contacts that have been entered can also be edited if contact information changes by clicking the pencil icon ( ) on the far right side of the screen.

The screen to the right is where you enter the contact information. Input the information you have. The fields are **Name**, **Phone**, and **Email Address**. **Contact Date** lists the date on which they were contacted. A **Notes** field is available for any notes related to the contact.

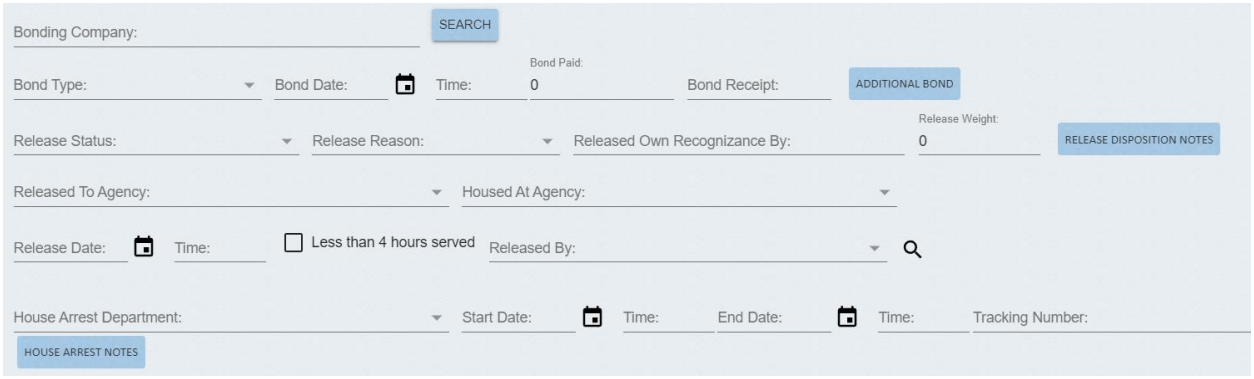


IMPORTANT: The contacts will **not automatically** be contacted upon release. This area just provides a place to hold the contact information.

Release Inmate Tab



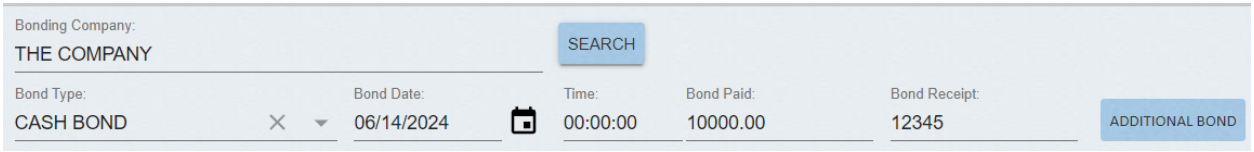
The **Release Inmate** tab is where information specific to releasing the inmate can be entered.



When you need to release an inmate, fill out the release info in the **Release Date**, **Released Time**, and **Released By** fields. These fields are required. If any of those fields are not filled out, the inmate will still show in your system as not released.

Field Explanations

Bonding Company / Bond Type / Bond Date & Time / Bond Paid / Bond Receipt



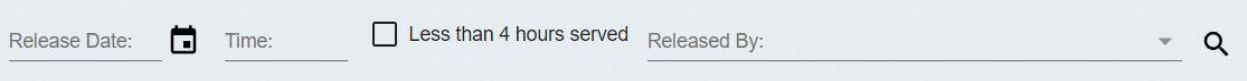
These fields are for inputting bond information. Use the **Search** button to select a bonding company. For more information on selecting the bond company, see the *Bonding Company* section of the Charges tab, page 91.

Release Status / Release Reason / Released Own Recognizance By / Release Weight / Released to Agency / Housed At Agency



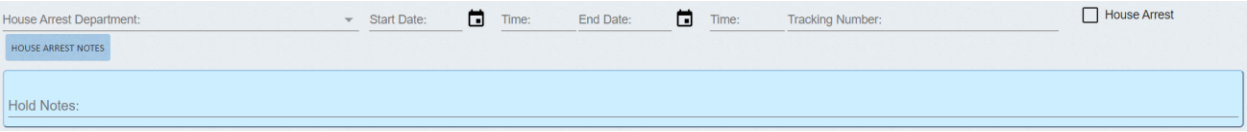
These fields are for the reason and status of the inmate's release. You can also record the weight of the inmate at release. If the inmate was released to another agency or is going to be housed at another agency, put that information here.

Release Date & Time / Released By



These fields are for the release information of the inmate.

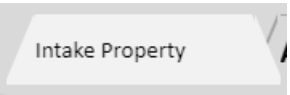
House Arrest Department / Start Date & Time / End Date & Time / Tracking # / Hold Notes



These fields are for recording information on house arrest. If the inmate will be under house arrest, make sure to include the start and end date. Check the **House Arrest** checkbox to keep track of this for reports.

REMINDER: You *must* fill out the Release Date, Release Time, and Released By fields, or the inmate will not show as released.

Intake Property Tab



The **Intake Property** tab is where you can enter information for property (items) the inmate had on them at the time of booking. As usual, you can double-click items on the table to edit them.

In this section…
Adding Property Items
Releasing Items
Changing Item Location



The buttons along the top right of the screen provide options to deal with the property.

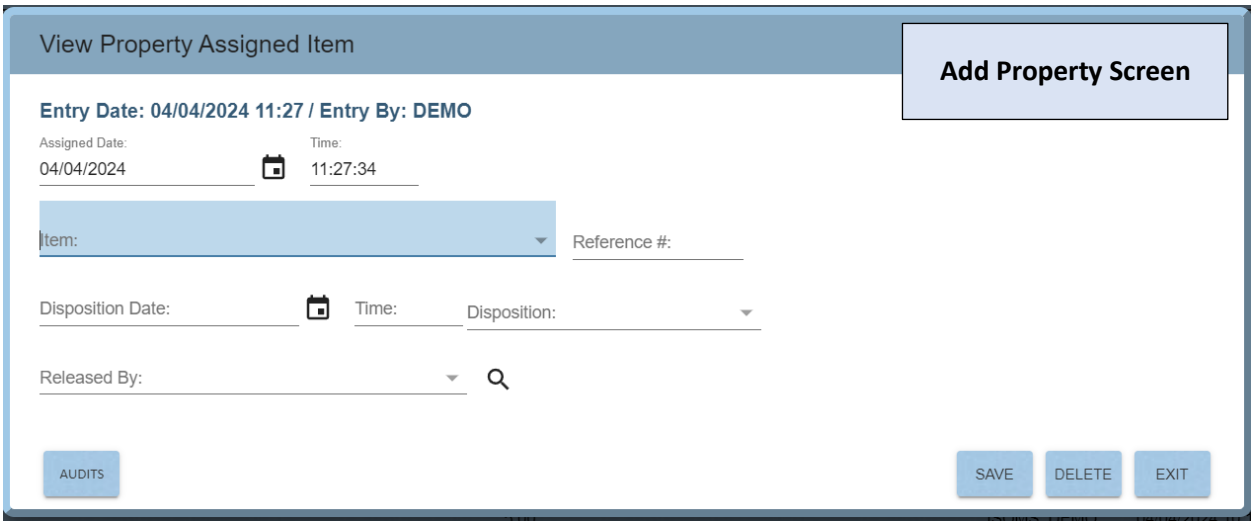


Adding Items

Single Items

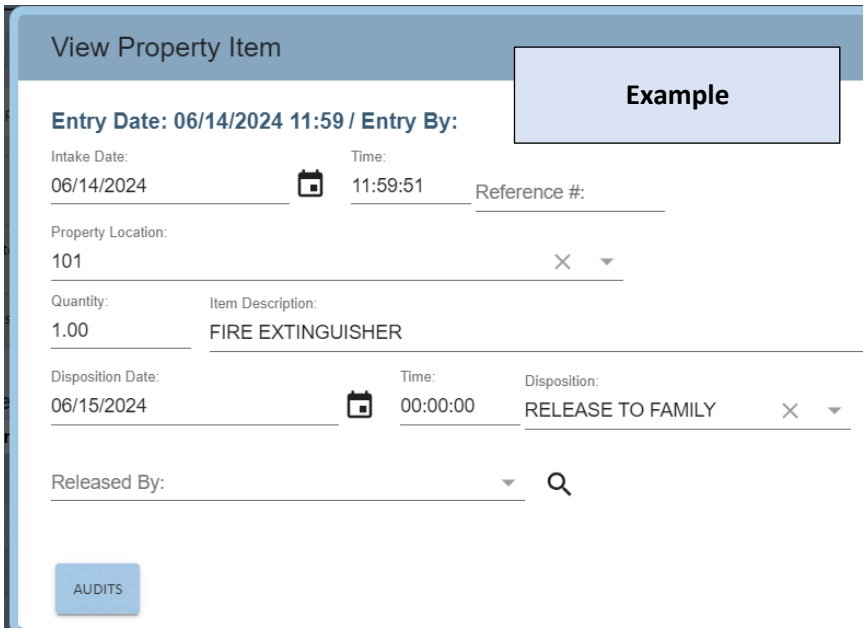
Use the **Add Property Item** button to add a single item. Disposition information can be added to property that is being added one at a time.





Describe the item, list how much of the item was present, and add disposition information if necessary.

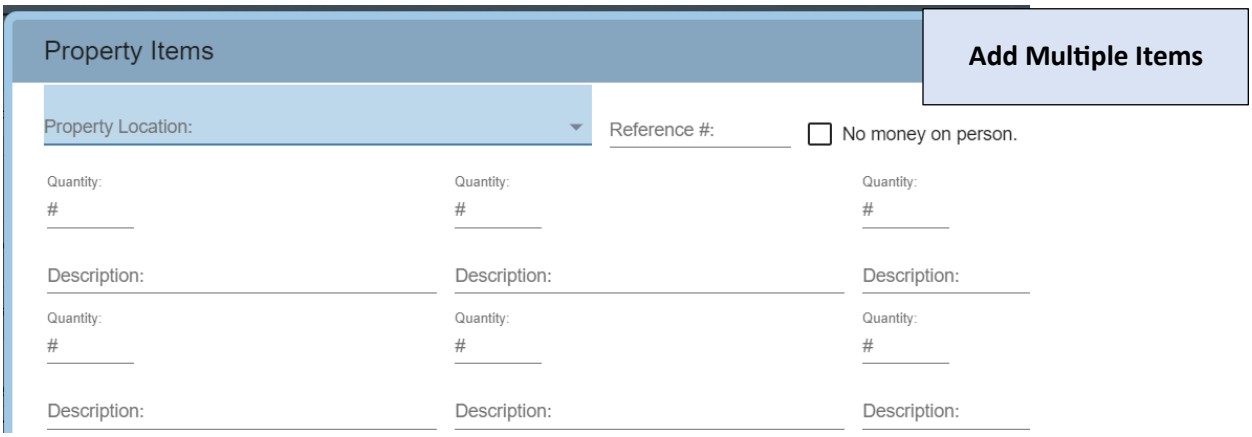
At some point the property will need to be released. The **Released By** field will record this when you release an inmate's property.



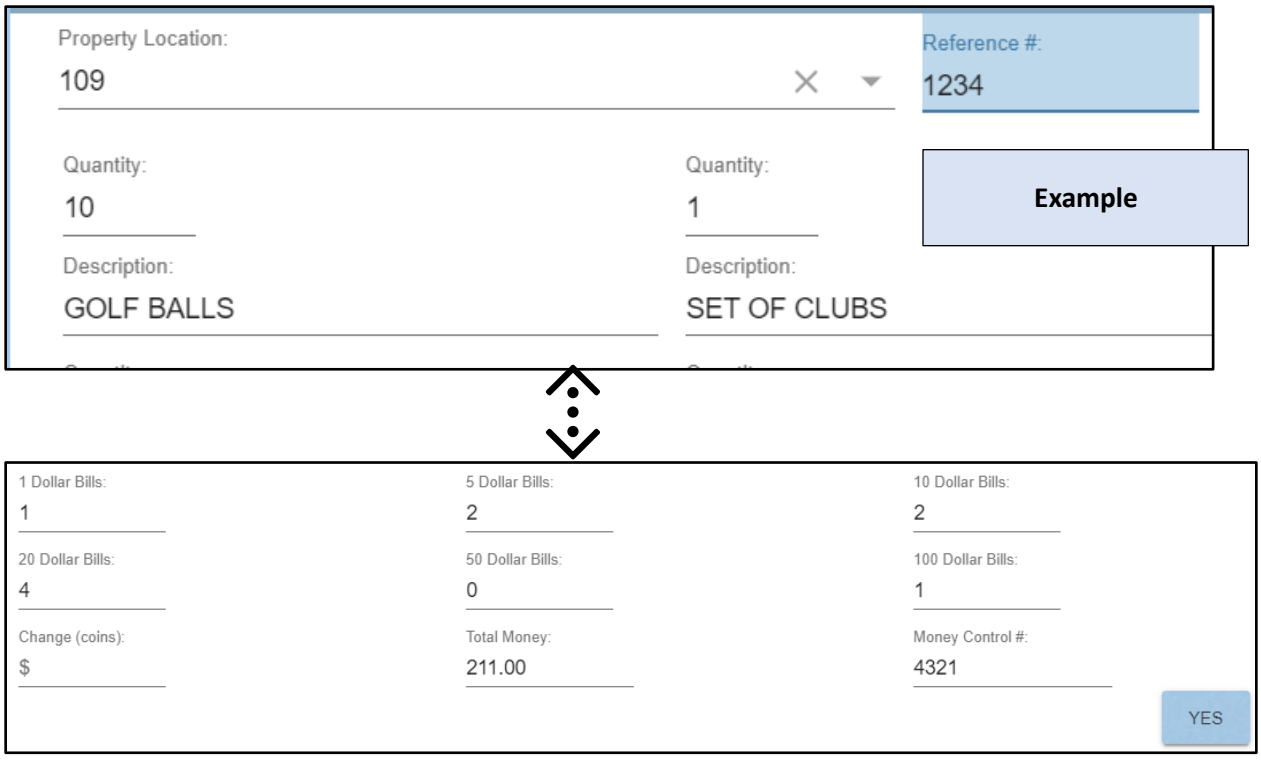
Multiple Items

You can use **Add Property Items** button to add several items at once. If adding money, you should use this option there are groupings for money on this screen.



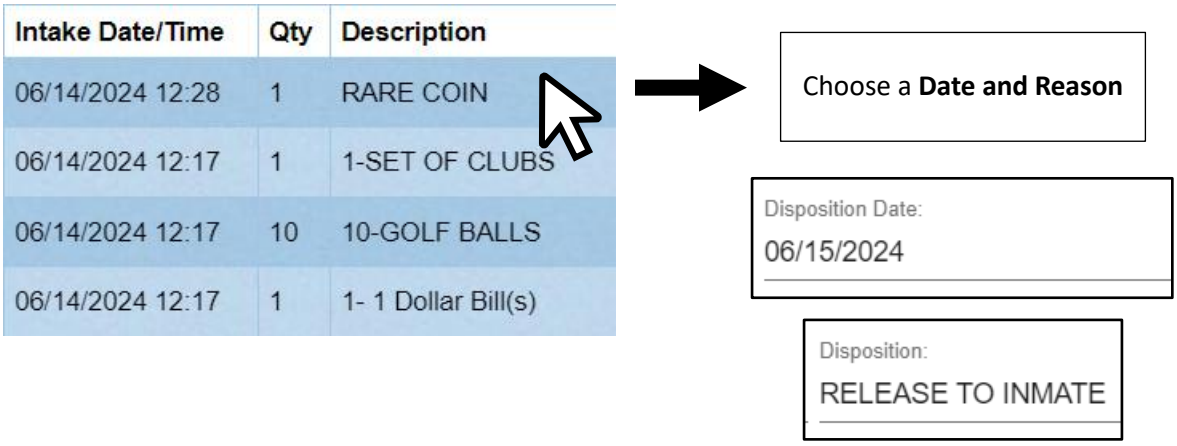


Input the location where the property will be held, add a reference number for the property, and describe each item. If the person has money on them, input it into each appropriate field. Click **Yes** when finished.



Releasing Items

When you want to release items, such as when the inmate is being released, you need to navigate to this tab to release them. Items can be released individually by double-clicking the item on the table, and then changing the disposition date and reason.



If you want to return all the items at once (such as at release), then the **Return Non-Disposed** button will let you return all non-disposed items. Here's an example of non-disposed items that we took from the inmate at booking time.

Qty	Description	Reference No.	Disposition Date/Time
1	1-MOVIE TICKET		
1	1-NOKIA PHONE		
1	RARE COIN		

If we click **Return Non-Disposed,** all of the items will become disposed.



Qty	Description	Reference No.	Disposition Date/Time
1	1-MOVIE TICKET		06/14/2024 12:46
1	1-NOKIA PHONE		06/14/2024 12:46
1	RARE COIN		06/14/2024 12:46

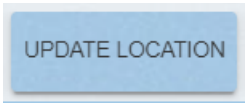
Reassigning All Locations at Once

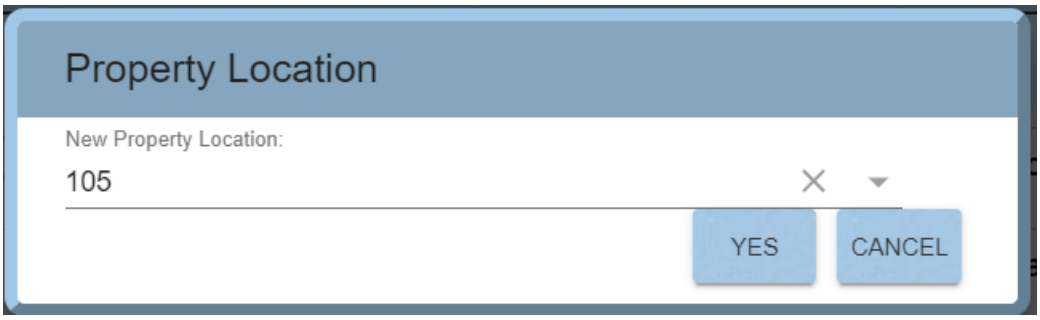
If you need to reassign all the locations of the items at once, you can use the **Update Location** button to do so. Simply click the button and choose a new location for all the items.

Before Location Reassignment

Location	Intake Date/Time	Qty	Description
102	06/14/2024 12:45	1	1-MOVIE TICKET
102	06/14/2024 12:45	1	1-NOKIA PHONE
102	06/14/2024 12:28	1	RARE COIN
102	06/14/2024 12:17	10	10-GOLF BALLS

After Location Reassignment





18 Property Items

Location	Intake Date/Time	Qty	Description
105	06/14/2024 12:45	1	1-MOVIE TICKET
105	06/14/2024 12:45	1	1-NOKIA PHONE
105	06/14/2024 12:28	1	RARE COIN
105	06/14/2024 12:17	10	10-GOLF BALLS

IMPORTANT: This only lets you re-assign the locations of items that have not yet been disposed of yet. If any items have been disposed of, this button will ignore those items.

Assigned Property Tab



The **Assigned Property** tab will list all the property being assigned to the inmate at booking.

11 Property Assigned Items

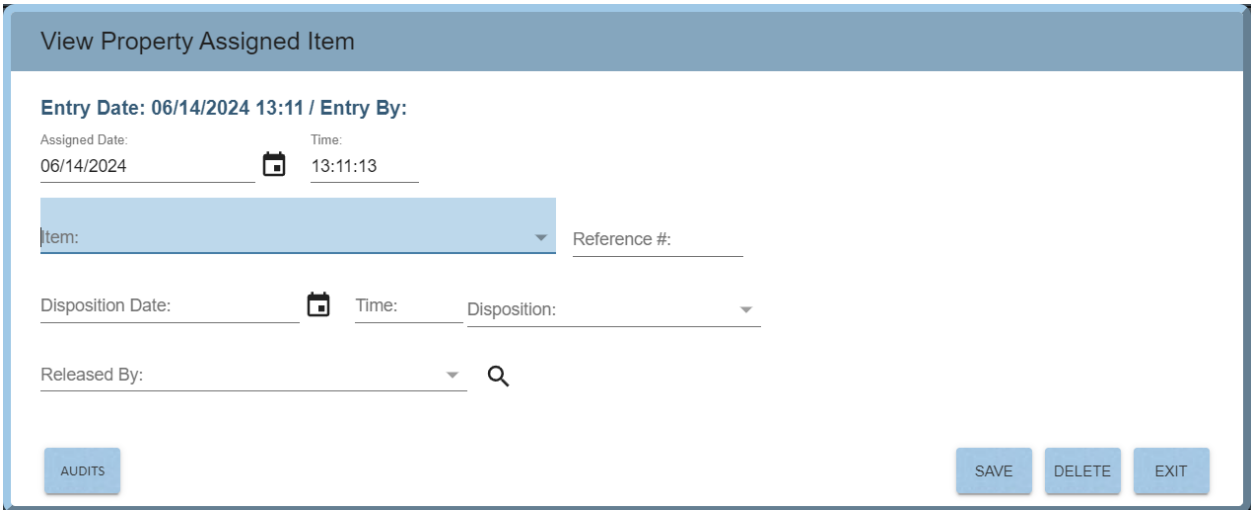
Assigned On	Description	Reference No.	Expendable	Replacement Cost
05/20/2024 15:07	PURPLE TSHIRT (FEMALE ONLY)			10.00
05/20/2024 15:07	SHEETS (2)			15.00
05/20/2024 15:07	SHOWER SHOES (CROCKS)			45.00
05/20/2024 15:07	STRIPE BOTTOM			20.00
05/20/2024 15:07	STRIPE TOP			20.00

The list will be the same for all inmates and is pre-selected in *Company Setup*. If items need information added, you can double click on an item to edit it.

Adding Additional Assigned Items

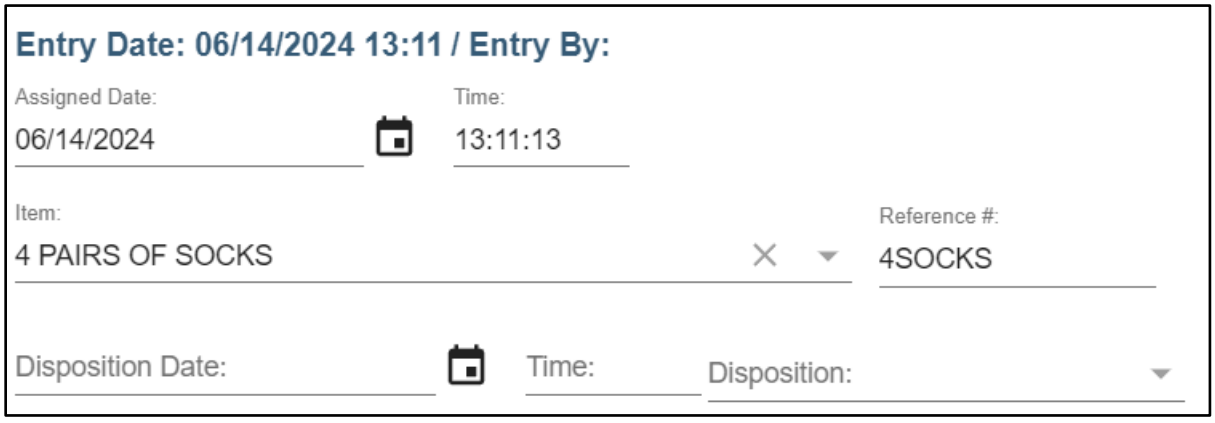
To add additional assigned items to this inmate only, click the **Add Property Assigned Item** in the top right corner of the tab.





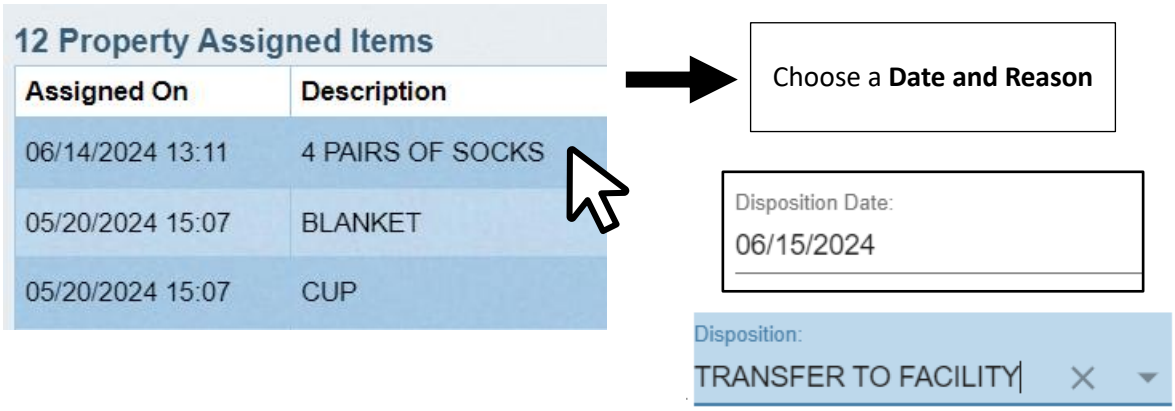
Add the item you need in the **Item** dropdown menu. These items are selected from a drop downlist which is controlled through *Maintain Files* and cannot be free form. The Disposition fields are for when the inmate no longer needs the item (e.g. because they are released) or the item needs to be reassigned.

Example of Assigned Item

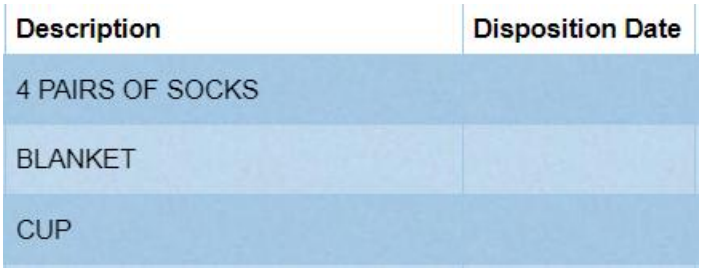


Releasing Items

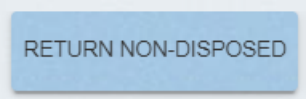
When you want to release assigned items, such as when the inmate is being released, you need to navigate to this tab to release them. Items can be released individually by double-clicking the item on the table, and then changing the disposition date and reason.



If you want to return all the items at once (such as at release), then the **Return Non-Disposed** button will let you return all non-disposed items. Here's an example of non-disposed items that we assigned to the inmate at booking time:

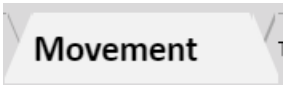


If we click **Return Non-Disposed,** all of the items will become disposed.



Description	Disposition Date
4 PAIRS OF SOCKS	06/14/2024 14:26
BLANKET	06/14/2024 14:26
CUP	06/14/2024 14:26

Movement Tab



The **Movement** tab is where all inmate movement and tracking information can be entered. You should enter information such as cell assignments, appointments, visits, court dates, church meetings, lockdowns, and more. This even includes information that is not a physical reassignment, such as supervisor checks or dispensing medications. Other tabs automatically link to this tab, so inputting information here is important to keep everything organized.

This is the tab where you assign or change cells of an inmate, so you can use it to record where an inmate is now being housed.

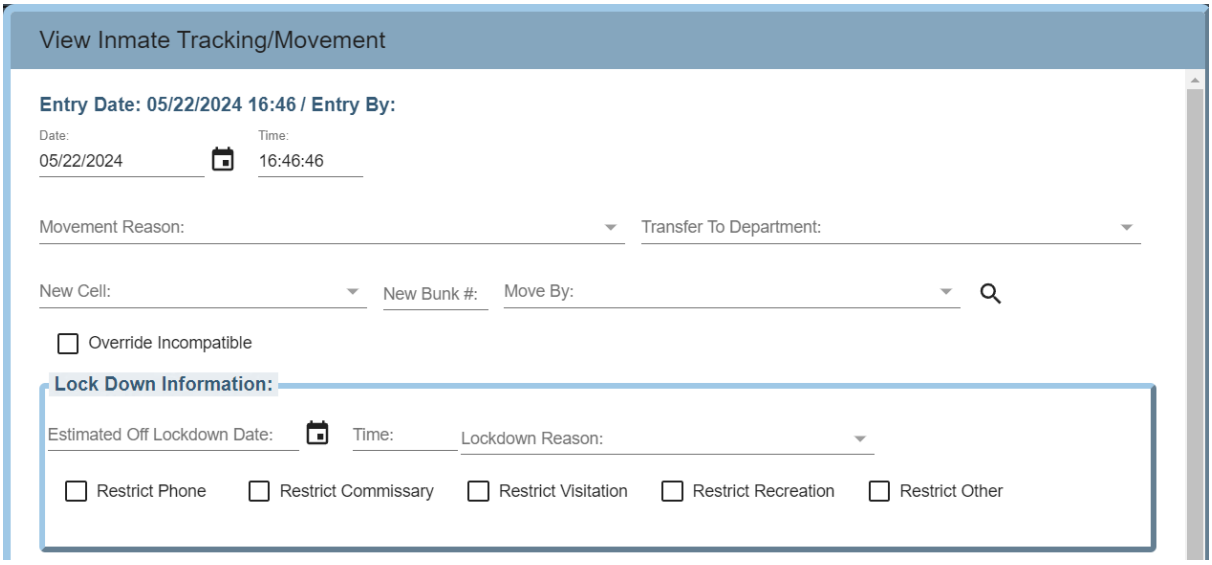


To edit an existing list item, simply double click it to edit it.

Add a New Movement or Tracking



When you click on the **Add Inmate Tracking** button on the upper right corner of the tab, the following screen will pop up where information can be entered. This screen also includes lockdown information.





Movement Reason lists the reason for the movement or status change of the inmate. Note that if the inmate has moved cells, you must also fill out the **New Cell** dropdown box as well. Appendix A (page 725) has a list of Movement Reasons for this box if you would like to see the default options.

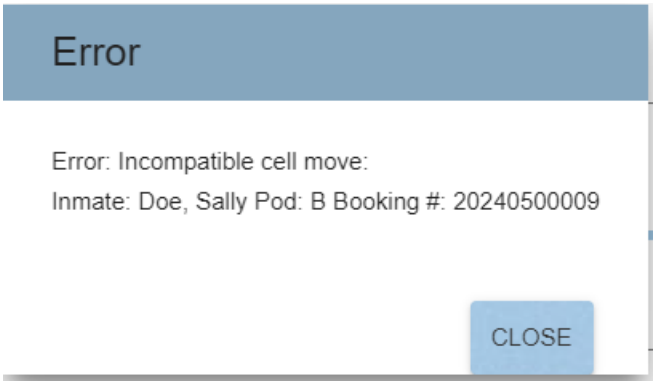


Transfer to Department should be filled in if the inmate is being moved to another department or agency.



New Cell / New Bunk # are the two fields that actually change the location of the inmate. Any changes here will be reflected in the **Housing** tab. If you attempt to move an inmate to a cell where another incompatible inmate is, you will get a warning about moving them into the same cell. You can override this with the **Override Incompatible** checkbox if necessary.

If anyone tries to move two incompatible inmates into the same cell, the following warning will appear:

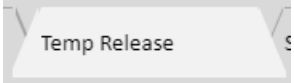


This helps others know not to combine these inmates in the same cell in case they are not familiar with the situation between the inmates. See the *Incompatibles* tab on page 166 for more information.

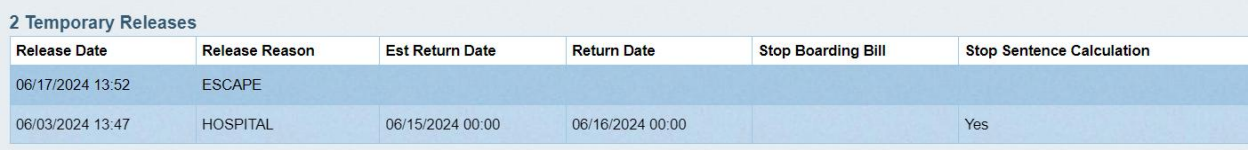


The **Lockdown Information** box is where you should input info if an inmate is going to be placed on lockdown. You can add the reason for the lockdown, the date the lockdown ends, and specific restrictions for this inmate.

Temp Release Tab



The **Temp Release** tab is where you can view or enter information for temporary release of the inmate. Use this tab to record Hospital visits, temporary reassignments to other agencies, or even escapes.

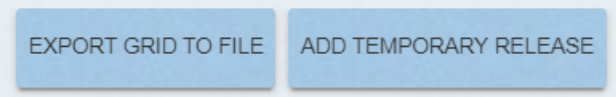


2 Temporary Releases

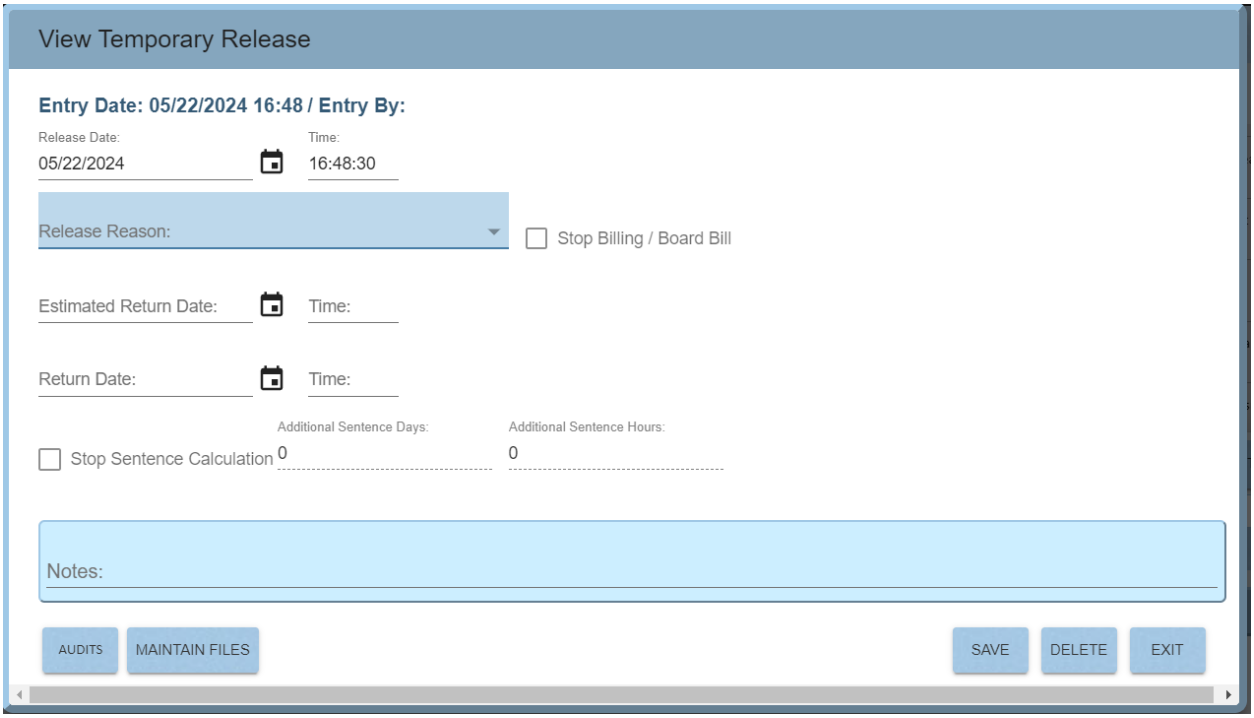
Release Date	Release Reason	Est Return Date	Return Date	Stop Boarding Bill	Stop Sentence Calculation
06/17/2024 13:52	ESCAPE				
06/03/2024 13:47	HOSPITAL	06/15/2024 00:00	06/16/2024 00:00		Yes

To edit an existing entry, simply double-click it to see the information and edit it.

Adding a New Temporary Release



When you click on the **Add Temporary Release** button on the upper right corner of the tab, the following window will pop up where information can be entered.



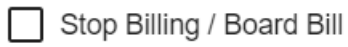
s



The **Release Date & Time** will automatically fill in the current date and time when you create a new Temp Release. If you need to change it, simply use this field to select the *beginning* date/time for the temp release.



The **Release Reason** drop-down menu allows you to record the reason for the temporary release.



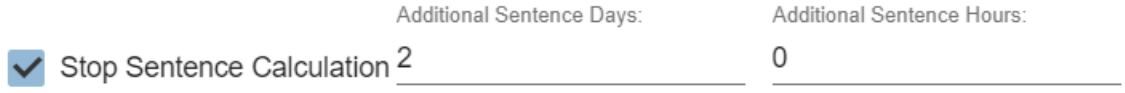
Use the **Stop Billing / Board Billing** checkbox to stop billing while the inmate is on temp release.



The **Estimated Return Date / Time** fields are for the date and time you expect the inmate to return. Note this may be different than the actual date and time the inmate returns. For example, the inmate might return from the hospital sooner or later than expected.

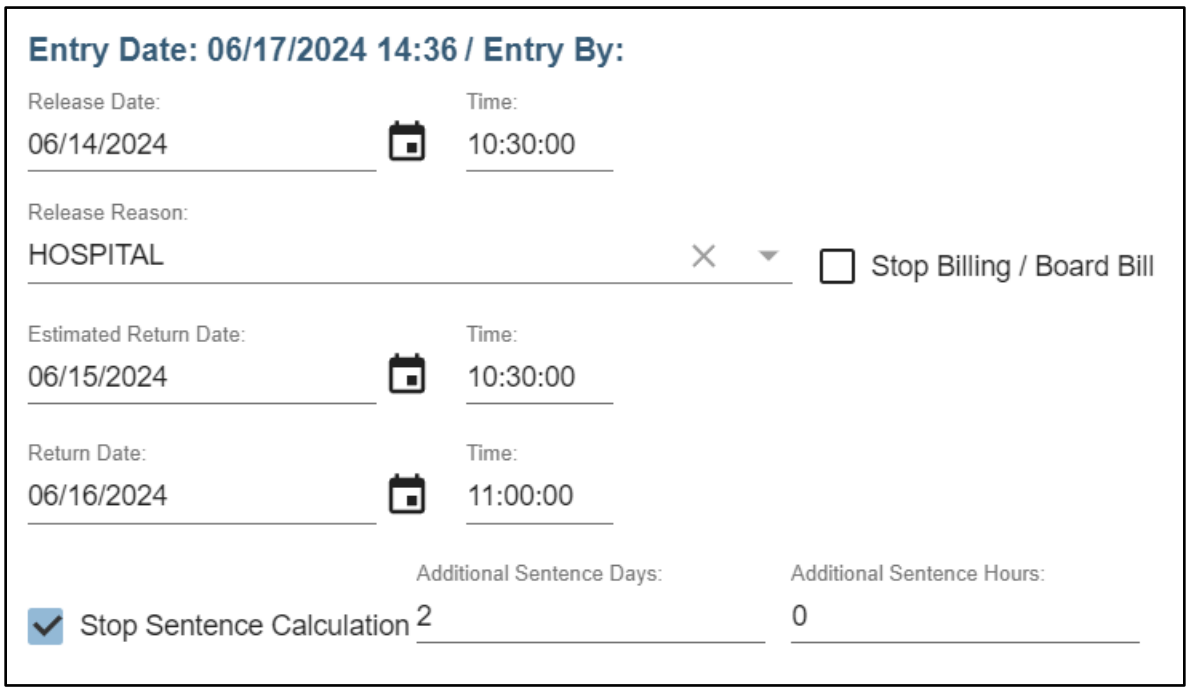


The **Return Date & Time** are for when the inmate has actually returned to your agency. You *must* fill this out in order to create another temporary release. Otherwise iSOMS views the inmate as still on temporary release and will not let you create another temporary release.

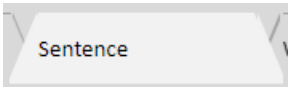


Use the **Stop Sentence Calculation** and the two time fields if the inmate is not serving sentence time while on temporary release. For example, if the inmate was released to another agency for 2 days, you would check the box and put 2 additional sentence days. This would keep the correct release date when iSOMS calculates the release date.

Example Entry:



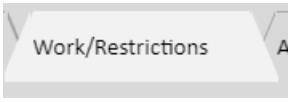
Sentence Tab



The **Sentence** tab is used to enter basic sentence information which means entering the inmate's total sentence information in one entry instead of per charge. Your agency will decide which method you use and who has permission to fill in sentence information. All users with security permissions in booking will be able to see the estimated release date in this tab, but only users with specific security permissions in sentencing will be able to input information. **NOTE**: Sentencing will be covered in detail later in this manual in its own section: see *Sentencing* on page 230.



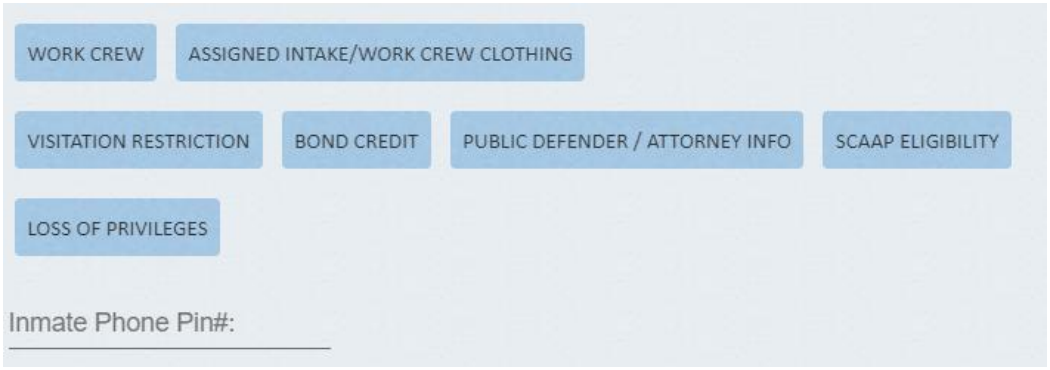
Work / Restrictions Tab



The **Work/Restrictions** tab is for information regarding work crew and restrictions for the inmate. You can enter crew info, bond credit, visitation restrictions, attorney info, SCAAP eligibility, and loss of privileges.

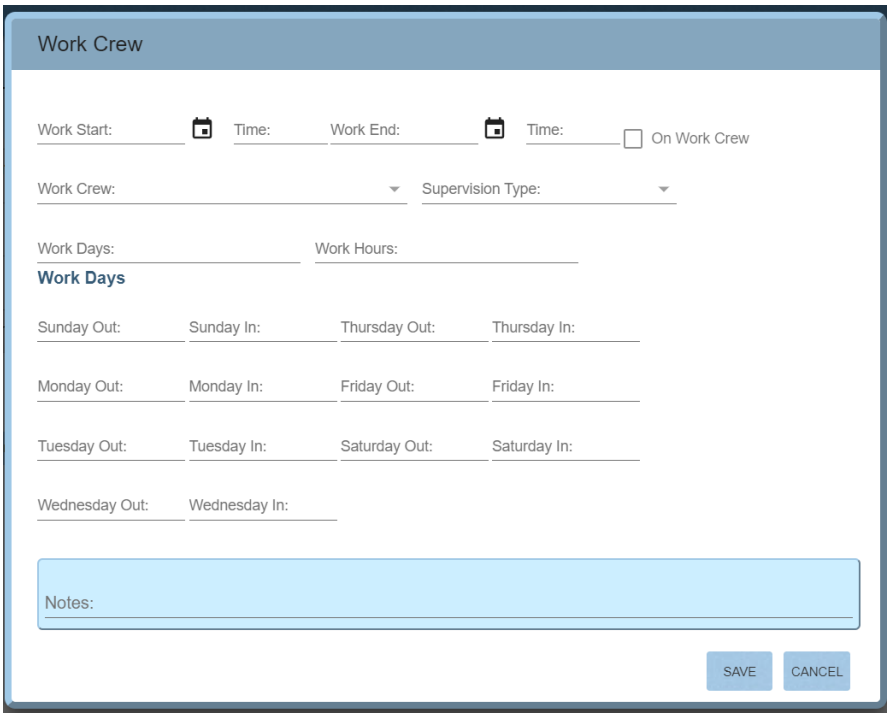
In this section…

Work Crew	Attorney Info
Visiting Restrictions	SCAAP Eligibility
Bond Credit	Loss of Privileges

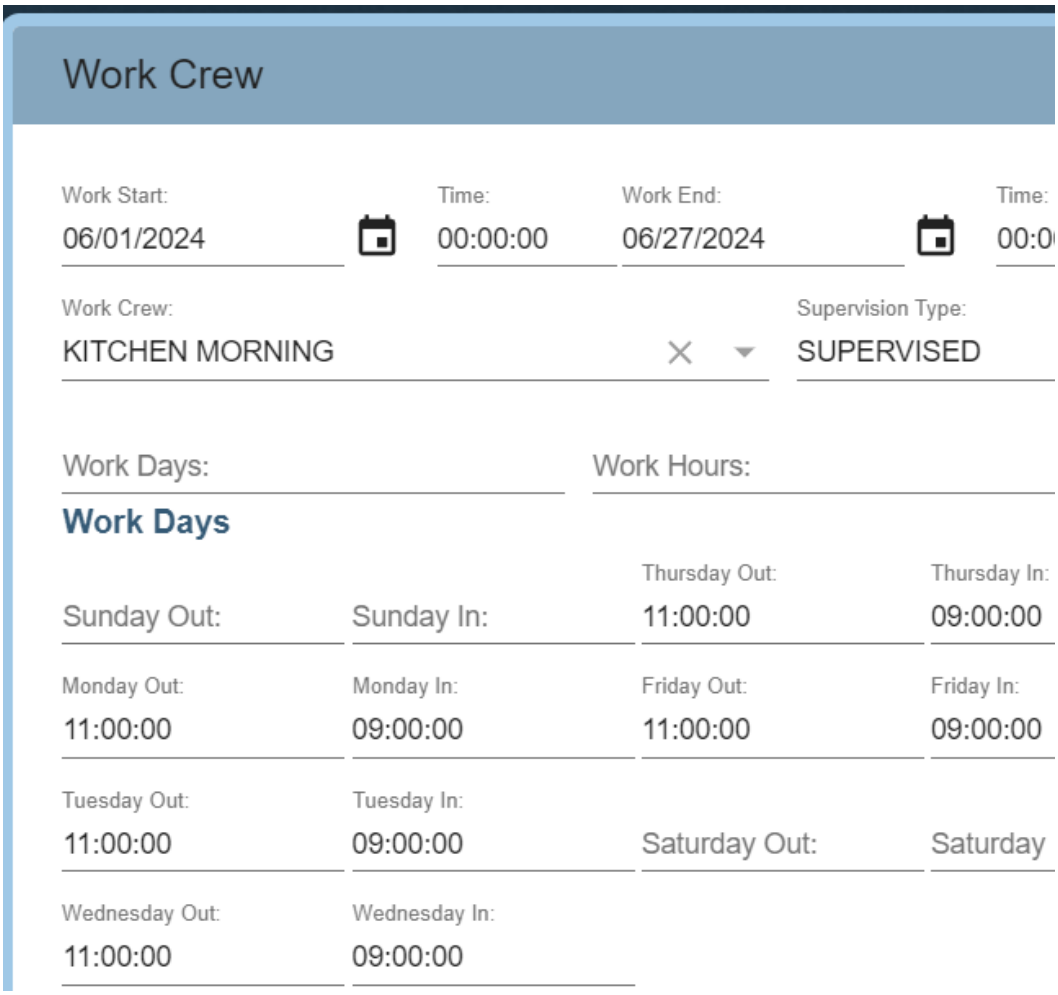


Adding a Work Crew Assignment

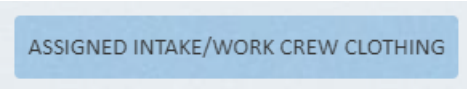
Click the **Work Crew** button to open the following window:



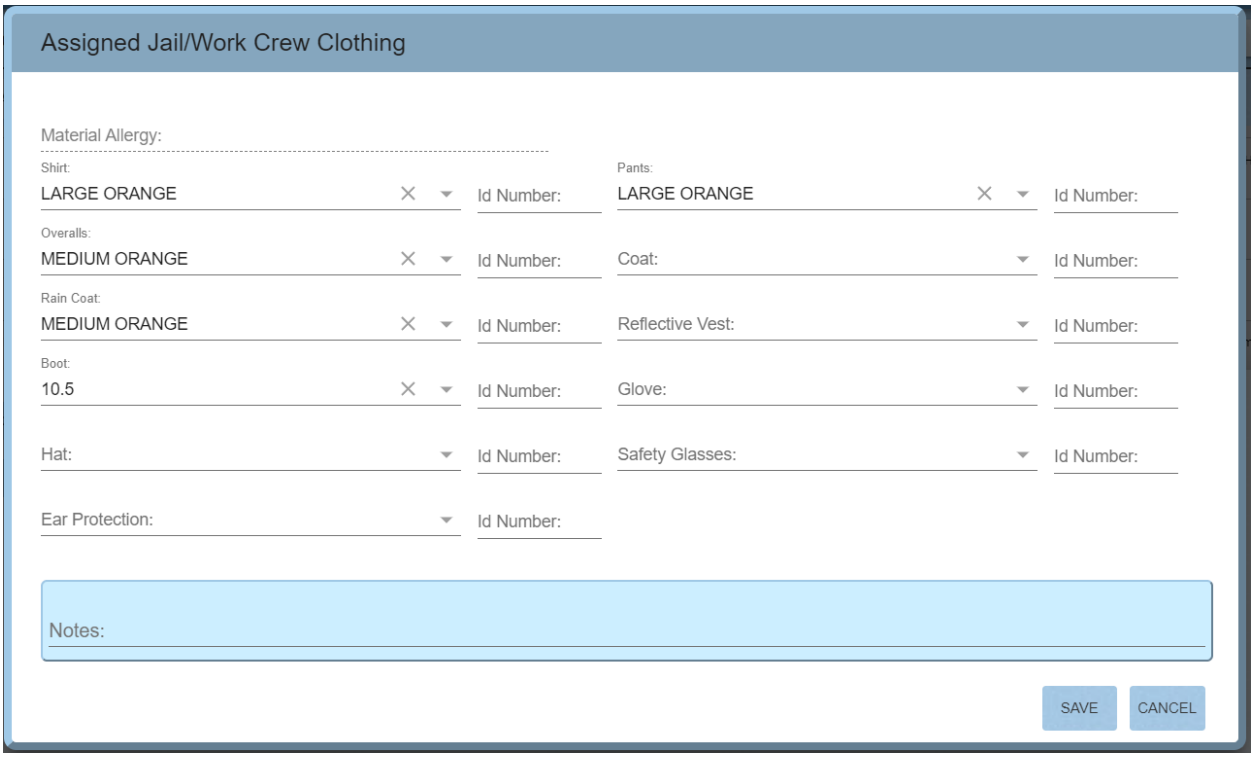
Fill in the details of the work, including to which crew the inmate is assigned. Add the times for appropriate days, and then click **SAVE** when finished.



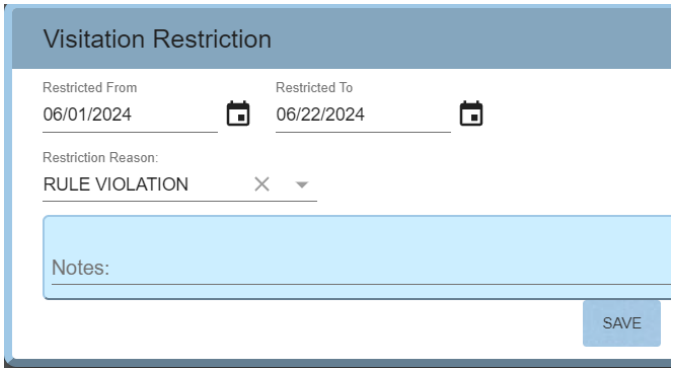
If the work requires certain assigned clothing, use the **Assigned Intake/Work Crew Clothing** button to assign specific clothing to this inmate:



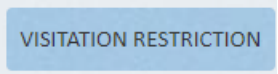
Fill in the clothing items assigned for the inmate and click **Save** when finished.



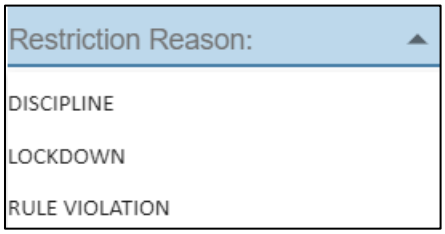
Adding Visitation Restrictions



You can add visitation restrictions on this tab to record any need to limit visits.

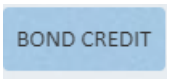


NOTE: These visit restrictions are not *automatically* notified. iSOMS will still allow you to add visits in the *Visit History* tab without a warning, so you may want to check here for any restrictions that might have been added by another person.

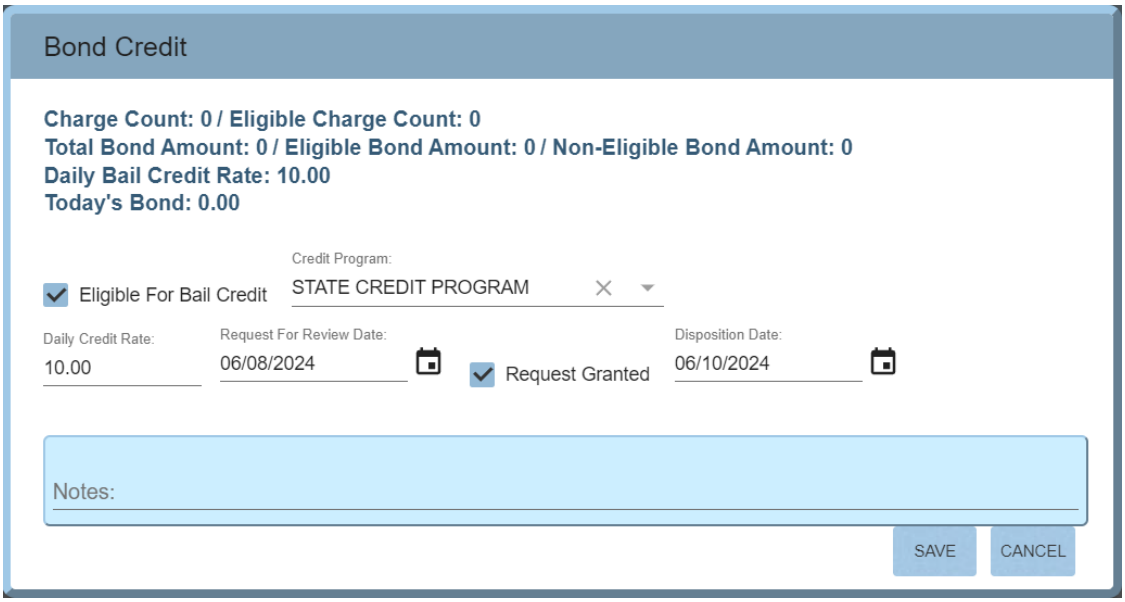


The **Restriction Reason** provides a few options to list why the restriction was placed. You can also add a note to record further information or reason.

Adding a Bond / Bail Credit



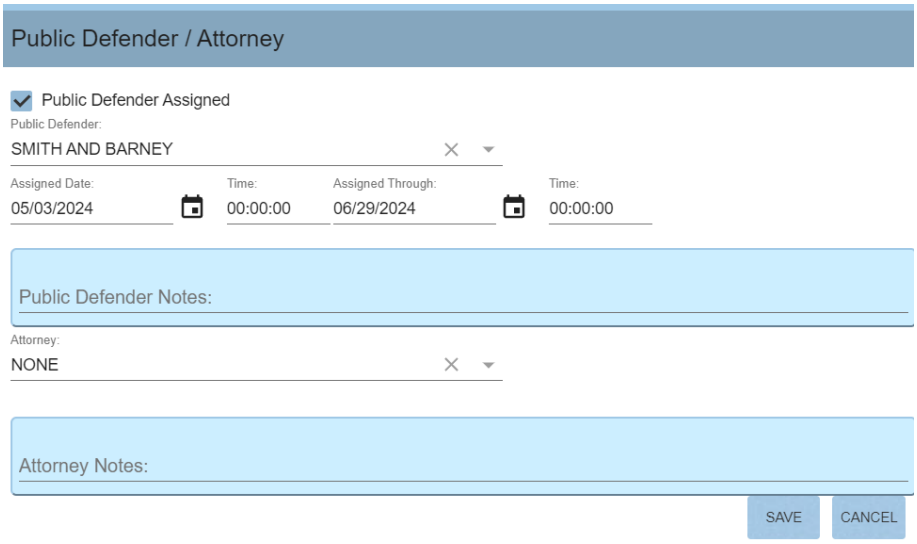
Click the **Bond Credit** button to add a bond / bail credit to this inmate's record. Fill out the Daily Credit Rate, the dates for Request for Review and Disposition if appropriate, and click Save when finished.



Public Defender / Attorney Information



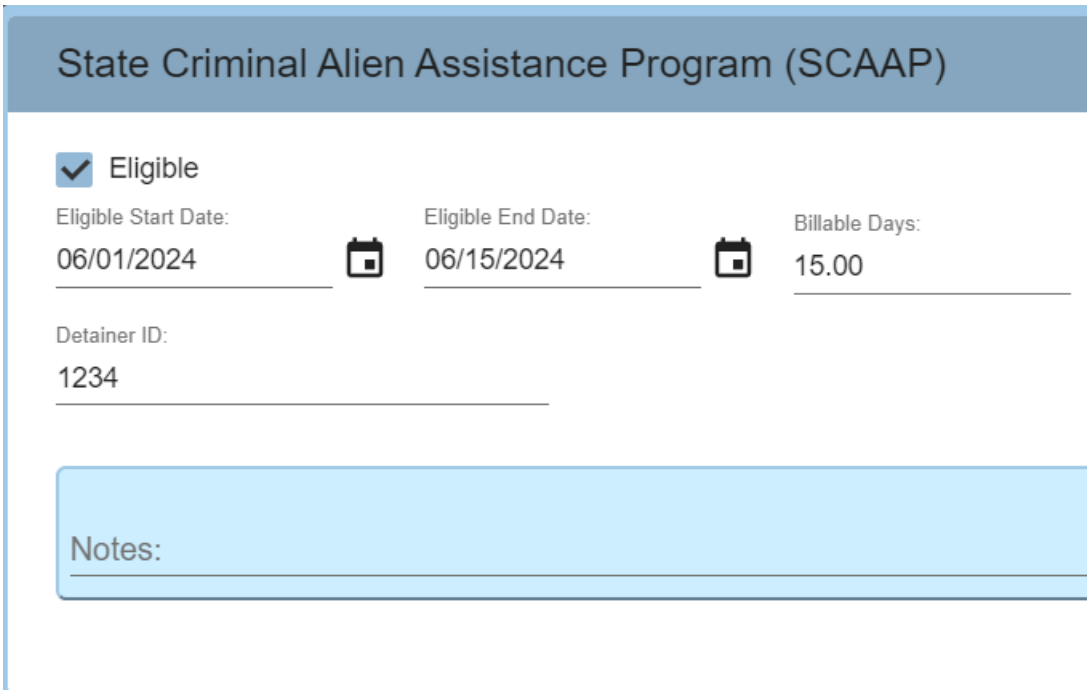
You can click the **Public Defender / Attorney Information** button to record the inmate's attorney or public defender. You can also add notes here if needed. Additional options for the dropdown menus will have to be added in *Maintain Files* by a Super User.



SCAAP Eligibility

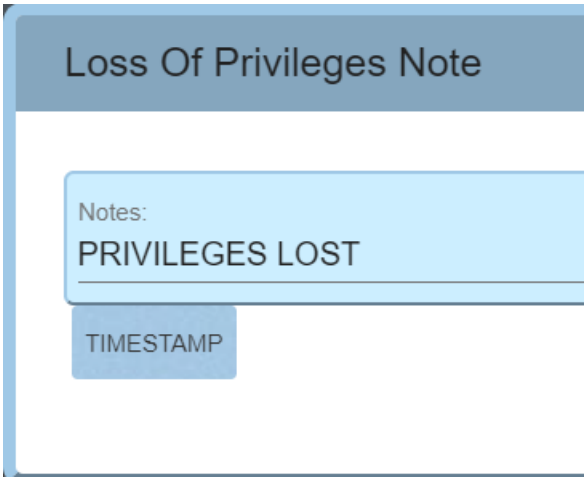


The **SCAAP Eligibility** button lets you record information on the inmate's eligibility and dates, including any notes. Use the *Eligible Start Date & Eligible End Date* to record the dates the program begins and ends, and then add other necessary info. Click **Save** when finished.

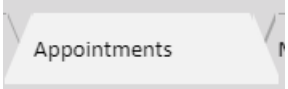


Loss of Privileges

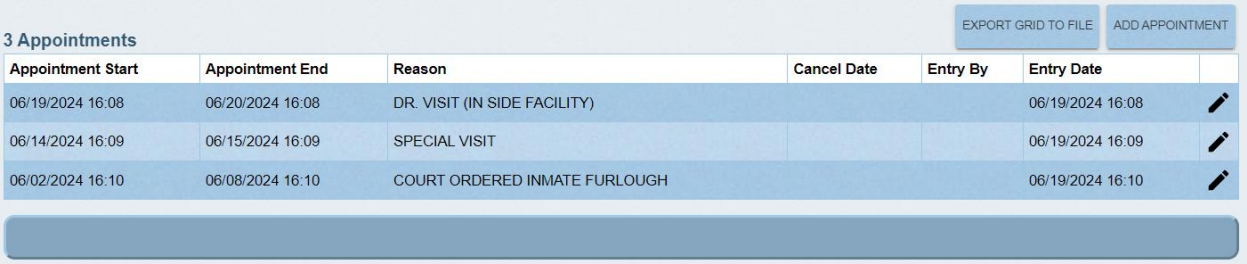
If an inmate has a loss of privileges, you can add a note on it on this tab by clicking the **Loss of Privileges** button.



Appointments Tab

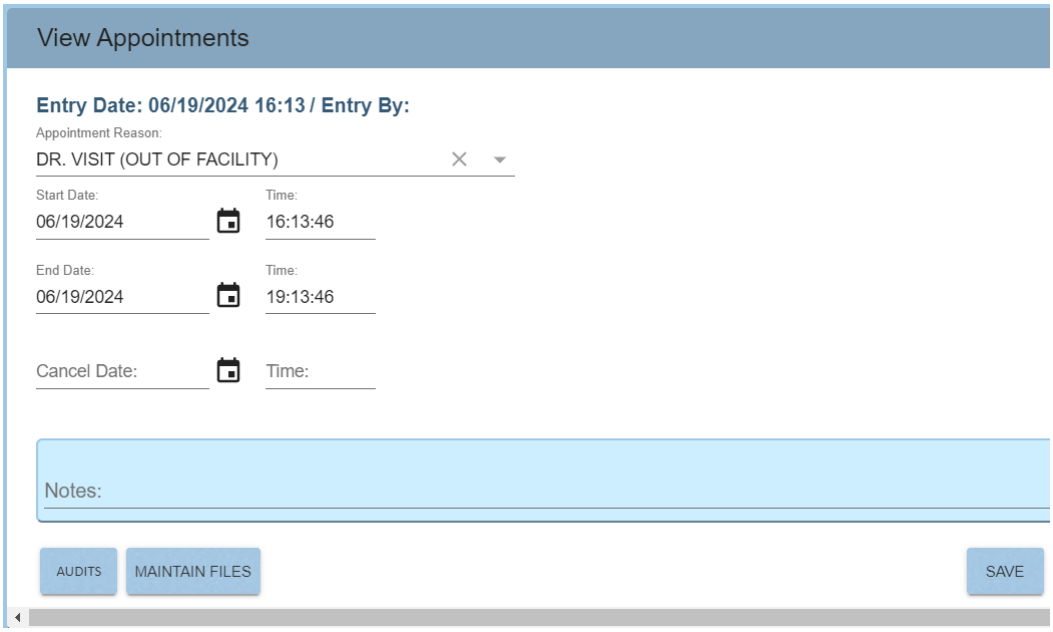


The **Appointments** tab is to be used to enter or view appointment information for inmates, such as doctor visits, attorney-client meetings, visitors, and so on. To edit an appointment, simply double-click it on the table.



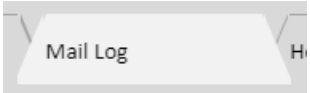
Adding an Appointment

Use **Add Appointment** to add a new appointment. Answer *Yes* to the confirmation window, and then the following window will appear:

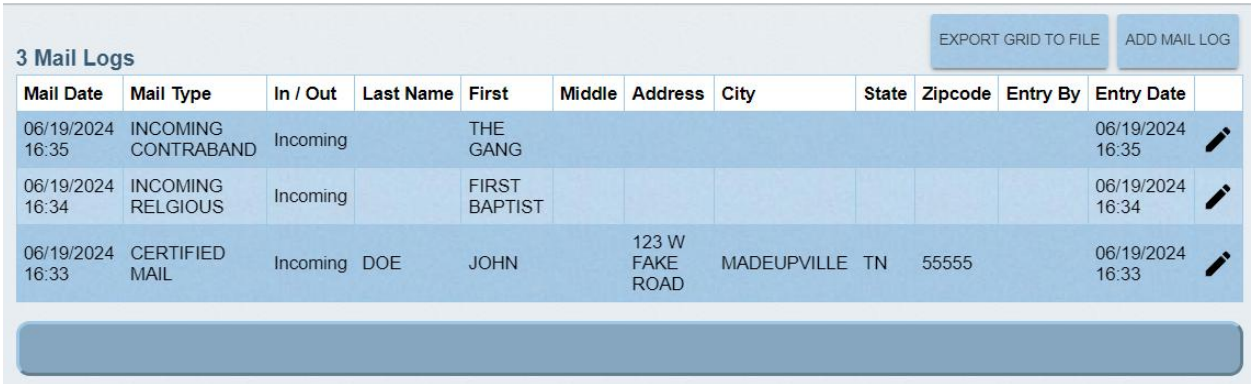


Add the appointment type under *Appointment Reason* and add the appropriate *Start and End Date* for the appointment. (Appt. Reasons are identical to movement reasons and found in Appendix A on page 725.) If the appointment is cancelled, you can add the *Cancel Date.* Notes are available below. Click **Save** when finished.

Mail Log Tab



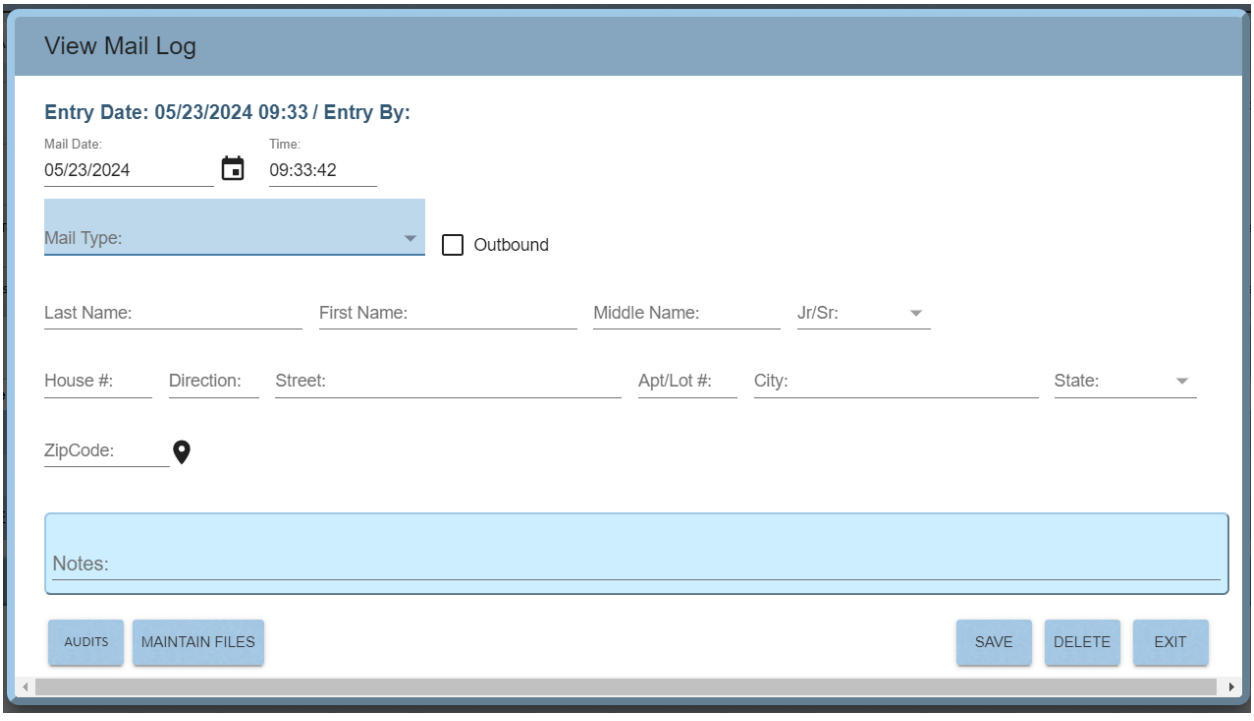
The **Mail Log** tab is to be used to enter and view mail that is received or sent by the inmate. Like other entry tabs, the current entries are on a table. Double-click a table entry to view or edit it.



Mail Date	Mail Type	In / Out	Last Name	First	Middle	Address	City	State	Zipcode	Entry By	Entry Date
06/19/2024 16:35	INCOMING CONTRABAND	Incoming		THE GANG							06/19/2024 16:35
06/19/2024 16:34	INCOMING RELGIOUS	Incoming		FIRST BAPTIST							06/19/2024 16:34
06/19/2024 16:33	CERTIFIED MAIL	Incoming	DOE	JOHN		123 W FAKE ROAD	MADEUPVILLE	TN	55555		06/19/2024 16:33

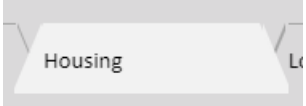
Adding a New Mail Long

Click **Add Mail Log** in the upper right to add a new Mail Long entry.

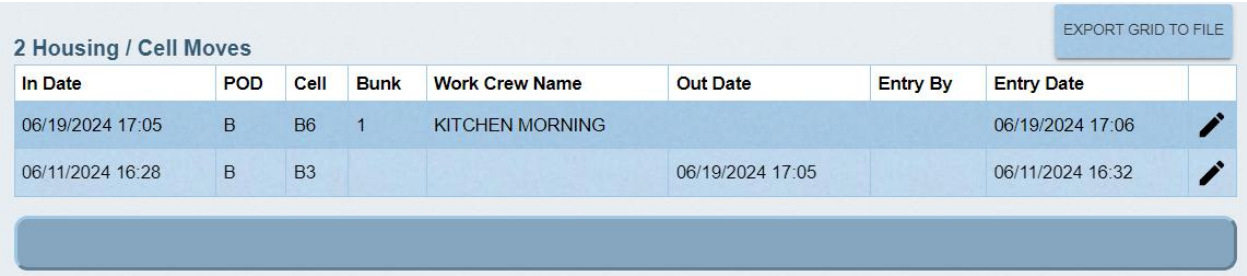


Add **Mail Type** to the dropdown field (more options can be added by a Super User in *Maintain Files*). Fill in the mail info, add any notes, and click **Save** to add the new mail log to the records.

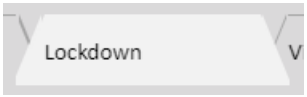
Housing Tab



The **Housing** tab will display all the housing information for the inmate. Information *cannot* be entered here; instead, the housing information that was entered in the **Movement** tab (page 123) will show here. **This tab will not allow you to add new entries, only edit them.**



Lockdown Tab

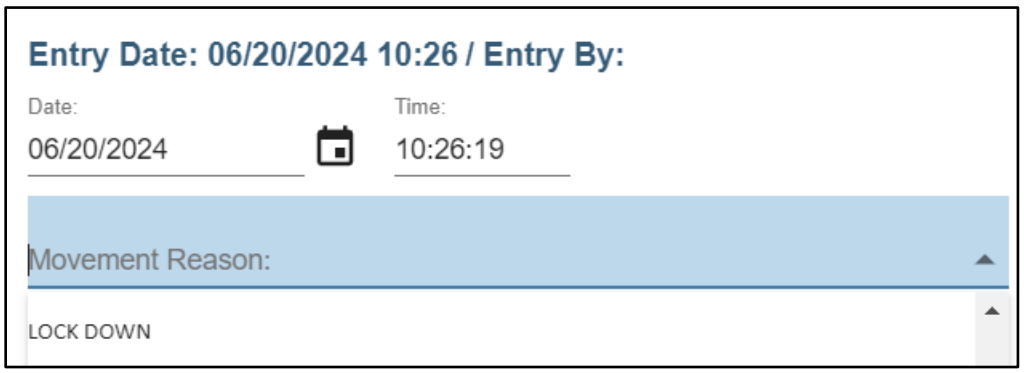


Lockdown of an inmate must be done by a superuser. Like the Housing tab, new information is not entered here. It is entered/completed in the **Movements** tab (page 123), but can be viewed by booking officers in this **Lockdown** tab. The dates the lockdown(s) began and are expected to end will show in this tab. You can also see specific restrictions and who entered the lockdown. **This tab will not allow you to add new entries, only edit them.**

How to Create a Lockdown:

Click on the **Movements** tab. (See page 123) Add a new movement, and choose *Lockdown* for **Movement Reason:**

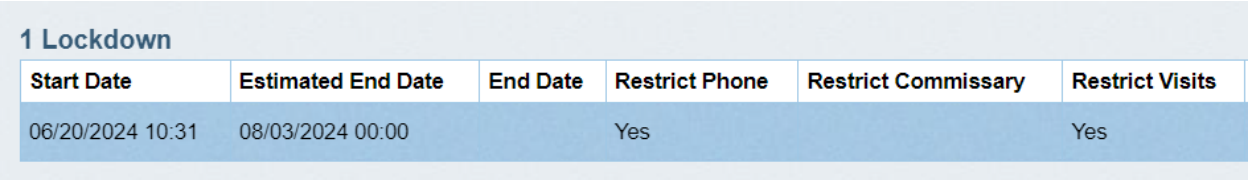


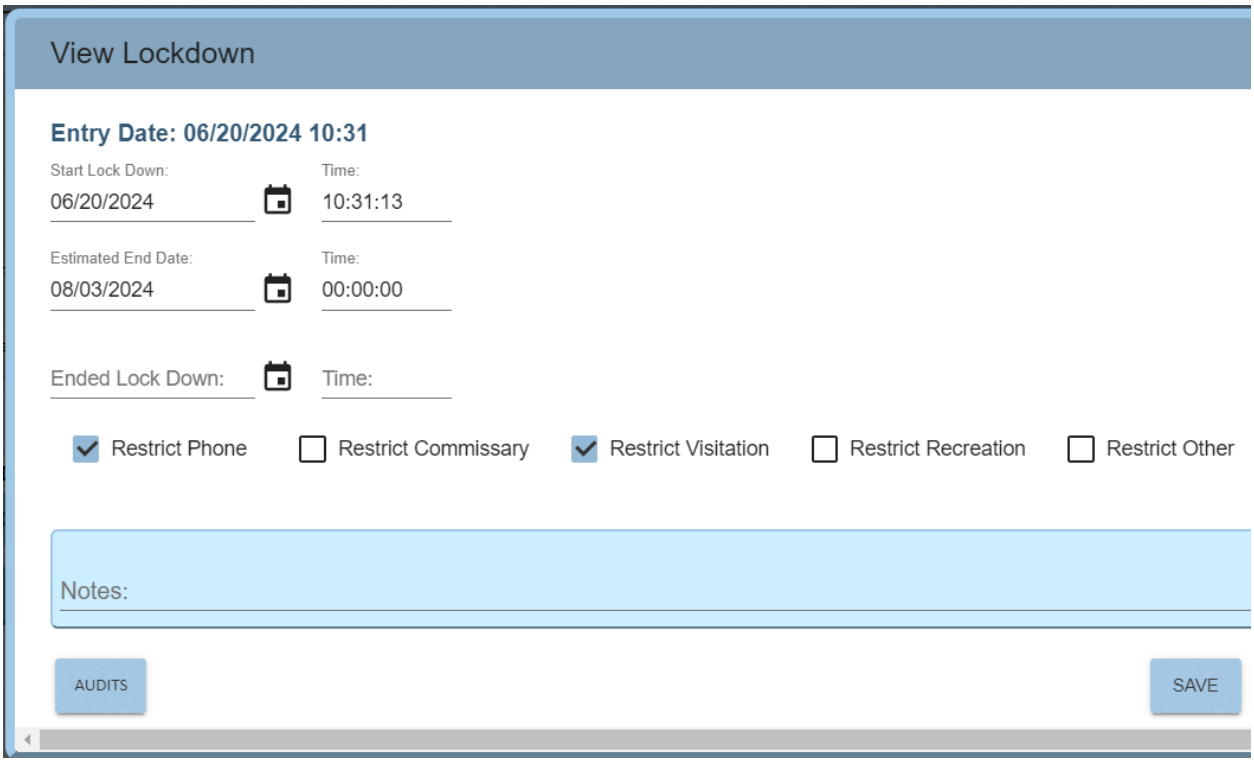


After you set the reason as Lockdown, fill in the **Estimated Off Lockdown Date and Lockdown Reason,** as well as any of the relevant checkboxes.

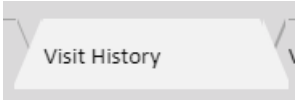


This will automatically add the lockdown to the **Lockdown** tab. You can double-click the entry to edit, for example, the restrictions or end the lockdown early.





Visit History Tab

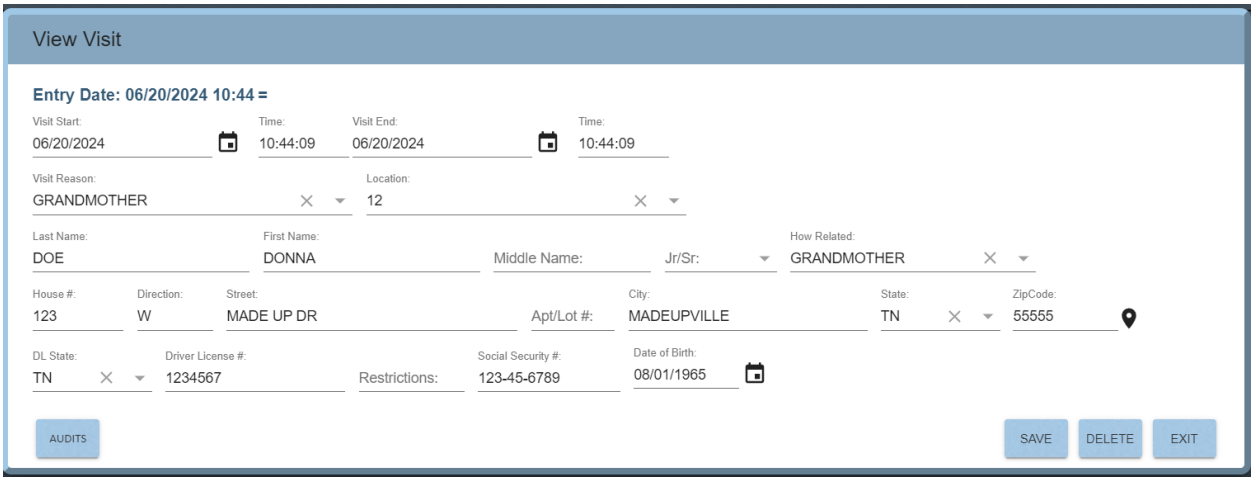


The **Visit History** tab is used to enter information about visits received by the inmate. If you would like to view a visit entry, double click it to view or edit it.

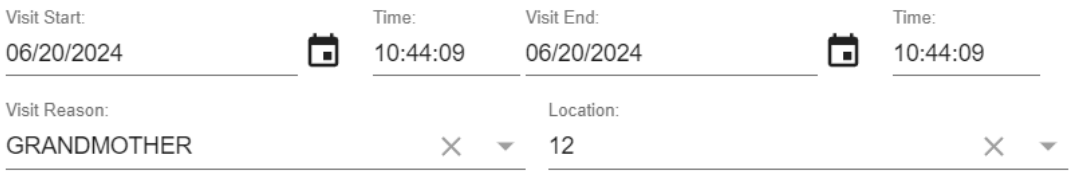


Add a New Visit

To add a new visit, click the **Add Visit** button in the upper right of the main tab.



Add the **Visit Start and End Date & Time**. Make sure to add the **Visit Reason**. You can use the **Location** to add the location where the visit will take place.

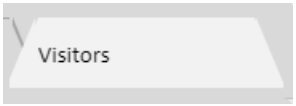


Now add the visitor's information, including how they are related or know the inmate, and then click **Save** when you are finished.

NOTE: These entries will **NOT** automatically add the person to the visitor tab; you must do that manually.

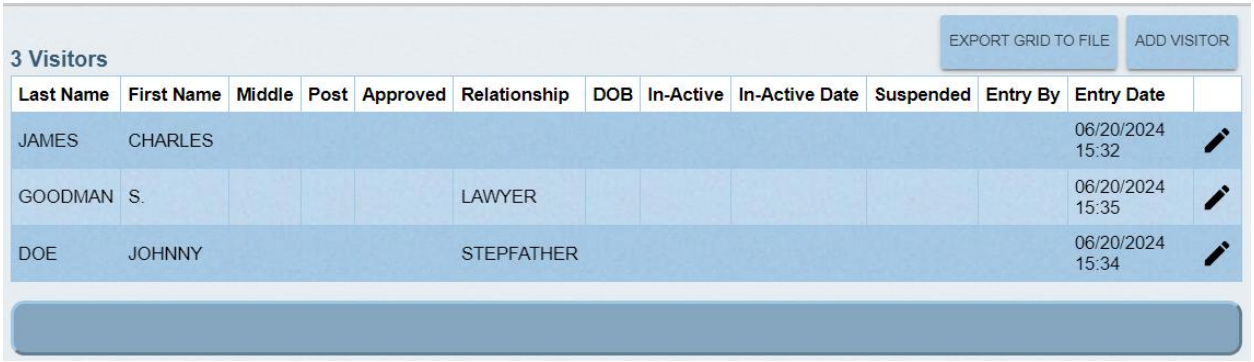
Corrections Manual

Visitors Tab



The **Visitors** tab is used to enter information about the people who would like to visit the inmate. This helps you keep track of visitors and their relationship with the inmate. Visitors can be marked as approved if they are approved to visit. Information for restrictions and suspensions will also be entered here.
If you would like to view a visitor's entry, double click it to view or edit it.

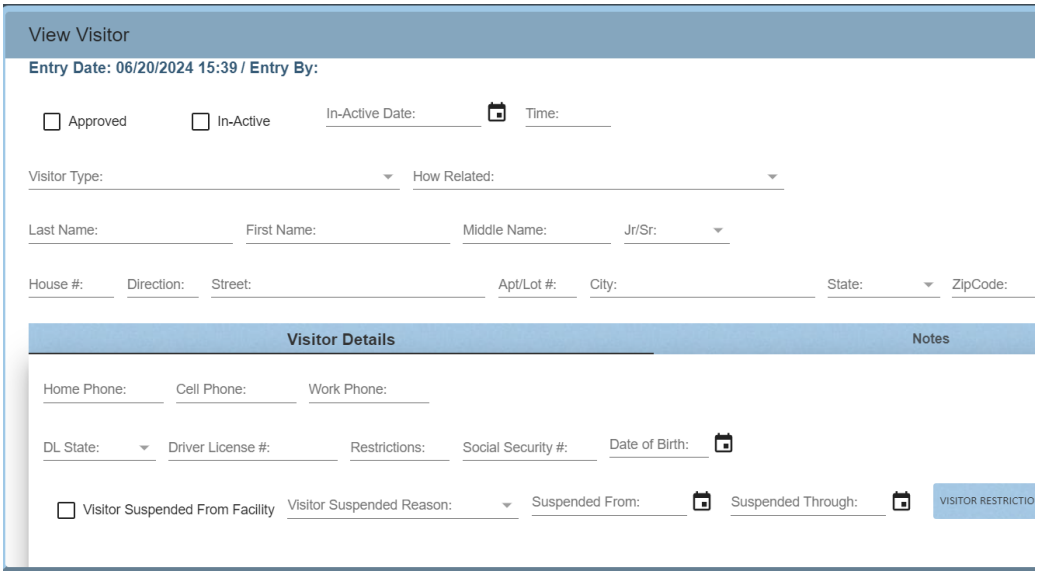
In this section…
Adding a New Visitor
Visitor Types and Relations
Visitor Restrictions



Adding a New Visitor

Double-click the **Add Visitor** button to add a record for a visitor.

The top section is for the personal details and address of the visitor. Make sure you use the **How Related** field to add the relation to the inmate.

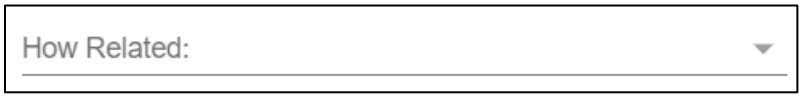


The bottom section of the window is two headings: **Visitor Details** for phone number, driver's license, or even suspension, while the other heading is for **Notes.**

Visitor Types and Relations

Visitor Type lists if the visitor is a family member, lawyer, or a minister. If the visitor is someone else, you can simply leave this field blank.



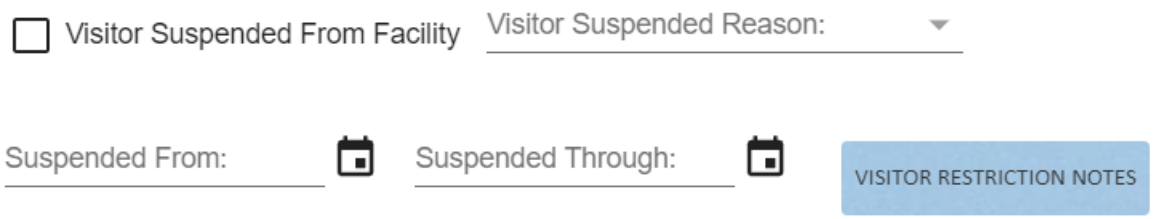


Use **How Related** to tell the specific relation of the visitor to the inmate. More options can be added by a Super User in *Maintain Files.*

Visitor Restrictions



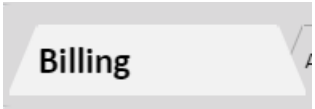
Underneath the *Visitor Details* heading, look at the bottom row of fields for visitor restrictions:



Use the **Visitor Suspended from Facility** button to record if this visitor is suspended. You will want to check here for any suspensions when checking in visitors. Don't forget to add the start and end date of the suspension and any notes using the **Visitor Restriction Notes** button.



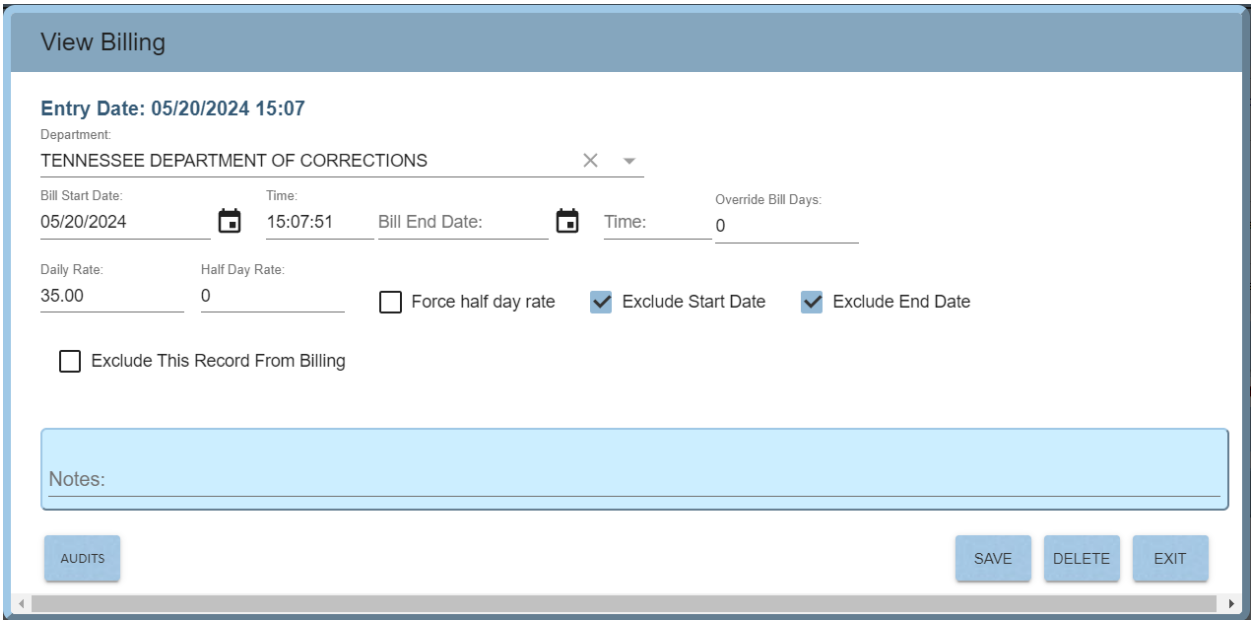
Billing Tab



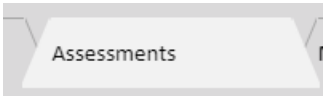
The **Billing** tab is for adding board bill information for the booking, such as the billing department, start and end dates, half day rate, etc. There is a box to check to exclude the end date if your agency does not bill for the release date.

NOTE: This is not where Board Billing is set up. Board Bill set up is done in *Maintain Files* by a Super User. Please see the *Board Billing* section on page 246 for information on how to setup and use Board Billing.





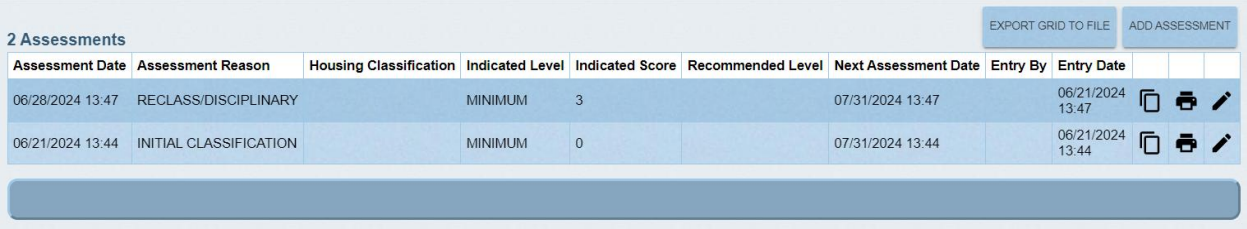
Assessments Tab



The **Assessments** tab provides information to fully assess the inmate and includes scores associated with the current charges, arrest, and previous arrests. This tab allows you to perform assessments to analyze factors and history of an inmate to help determine classification, etc. To edit a current entry, double click it in the table.

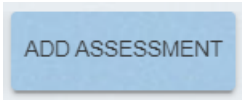
In this section…

Adding New Assess.	Mgmt. Summary
Custody Levels	Notes/Incidents
Adding Factors	Scoring
Adding History	Indicated Levels
Evaluation Performance	

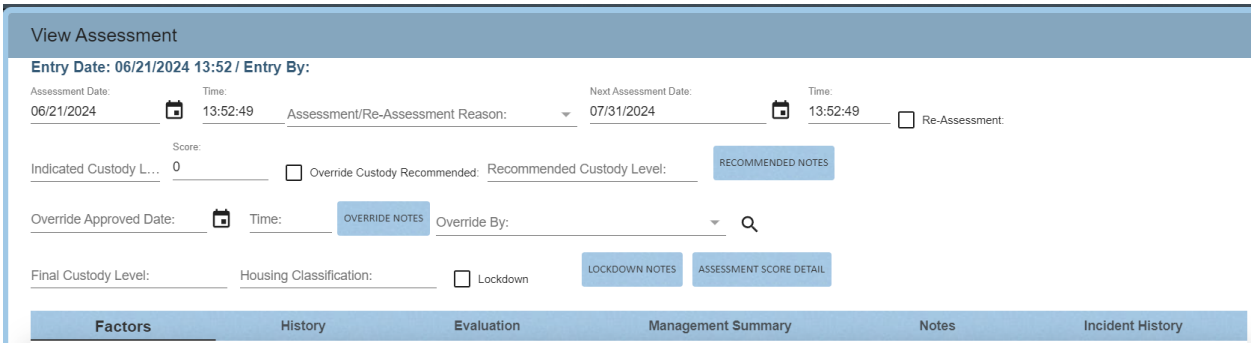


Adding a New Assessment

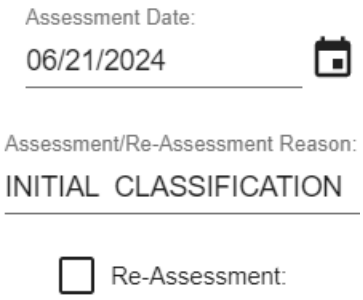
If you would like to add a new entry, click **Add Assessment** in the upper right of the main tab.



This will open the assessment window, where you can enter different factors and history to help you determine the housing classification of the inmate. The top fields are for the information on performing the assessment, and the headings along the middle of the window are to record the assessment.

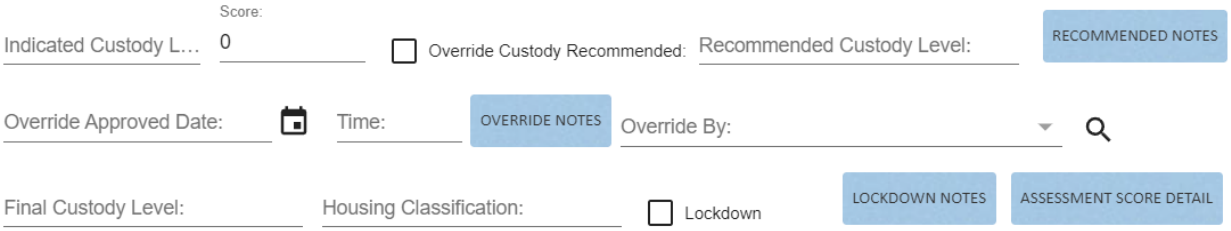


Assessment Details



Fill in the **Assessment Date** if it is different than the current date, and then add the **Assessment/Re-Assessment Reason.** The **Next Assessment Date** will be automatically calculated, but if you need to add a different date, you can do that here. Be sure to check the **Reassessment** checkbox if this is a reassessment.

Custody Levels



The next set of fields is for the custody level. The indicated custody level will give you *Minimum, Medium, or Maximum* automatically based on the score result from the assessment. When you save the assessment, the **Indicated Custody Level** will be automatically updated. This will help you decide the housing for the inmate.



If you believe that the assessment is not classifying the right level of housing, you can check the **Override Custody Recommended** box and add a **Recommended Custody Level** along with notes to explain the reason. Then a supervisor should add an **Override Approved Date,** a **Final Custody Level,** and a **Housing Classification** so that the housing level will be changed.



Note that there are options for lockdown here, but those options do not automatically coordinate with the *Lockdown* tab. Use the *Movements* tab to add a lockdown that automatically coordinates with the *Lockdown* tab.

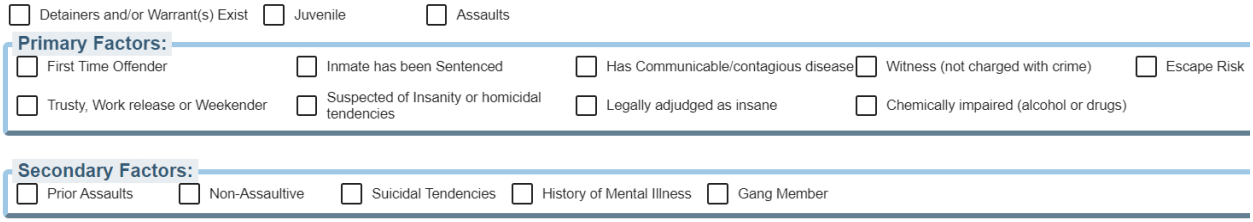
Each of the factors, history, etc. in the headings will add or subtract to the score that determines what level iSOMS recommends for the housing classification. However, the displayed score mainly uses the *Evaluation* tab. See the *Scoring* section at the end of this tab's explanation for a detailed view of the scores and their implications towards minimum, medium, and maximum.

Go through the factors, history, and evaluation tabs when giving an assessment, and then add additional information in notes, management summary, and incident history if needed.

Adding Factors



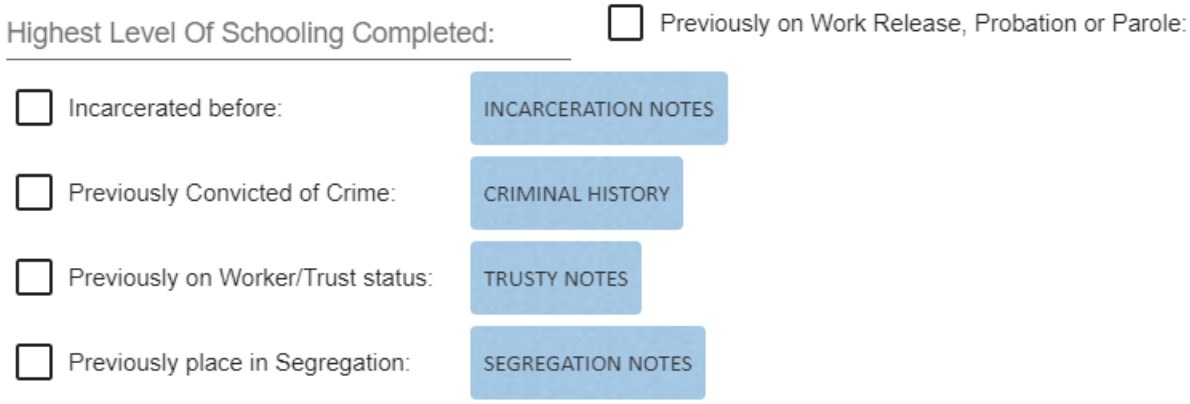
Click the *Factors* tab to begin adding factors. Check each box that qualifies. The **Detainers and/or Warrants Exist** and **Assaults** checkboxes have special effects on the score that will be discussed in the *Scoring* section that follows the heading explanations.



Adding History



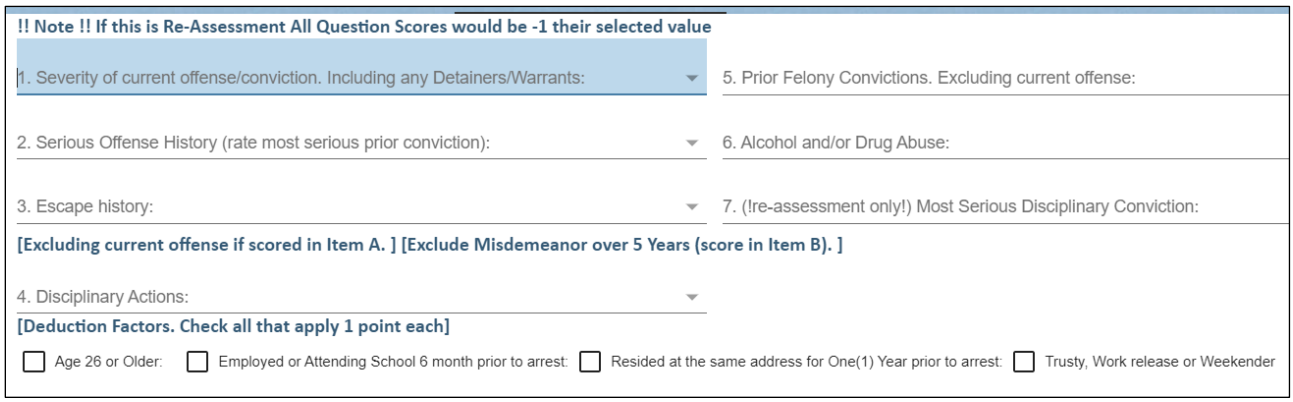
Use the *History* tab to keep track of the inmate's history during this assessment. Each of the checkboxes has an associated notes button. Check any appropriate boxes, take the necessary notes with the buttons, and then proceed to the *Evaluation* tab.



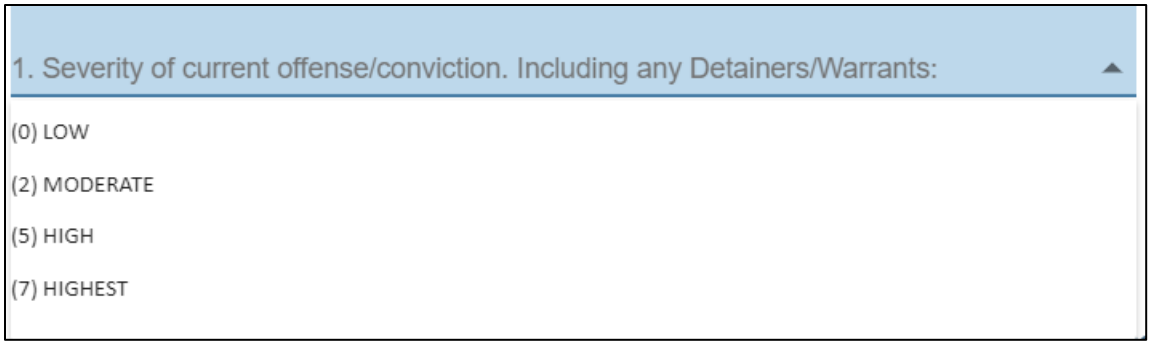
Performing the Evaluation



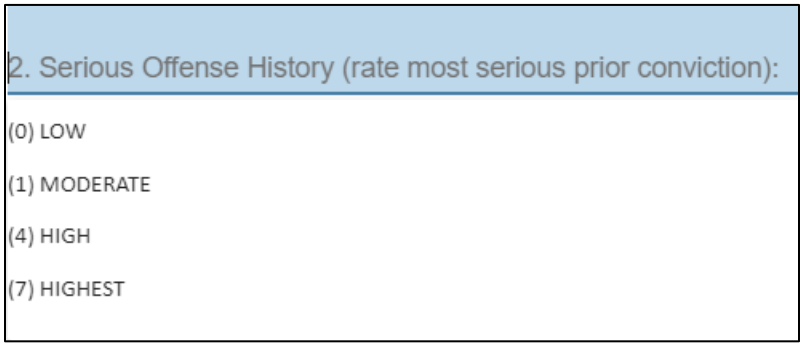
Now you will evaluate the inmate for their history on the *Evaluation* tab. These are the primary drivers of the *survey score*, which is one of the main factors in determining housing classification for the inmate. Answer each question and the score will bec calculated automatically.



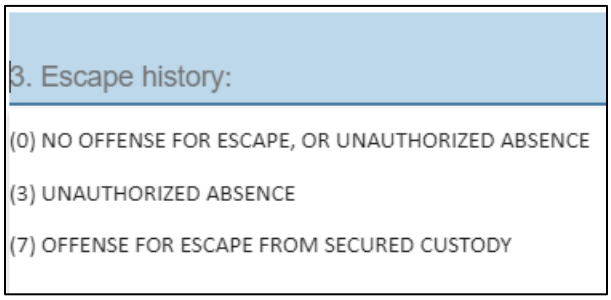
First, rank the **severity of the current offense**, including detainers and warrants.



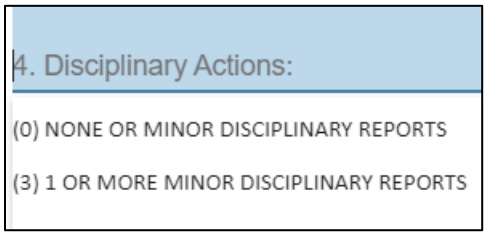
Next, rate the **most serious prior conviction**:



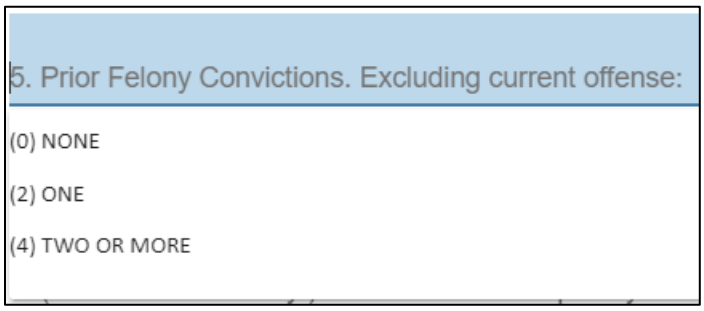
Now add any **escapes or unauthorized absences**:



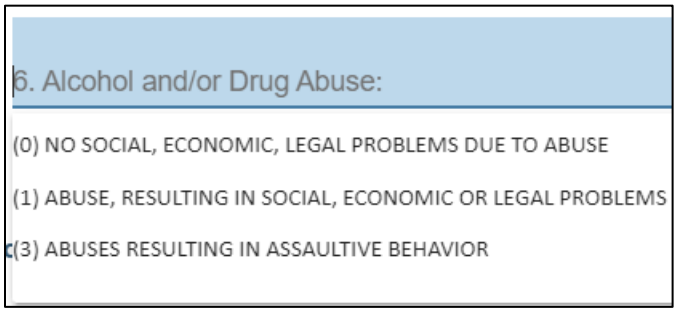
Fourth, take note if there have been any **disciplinary reports:**



List if there were **prior felony convictions:**



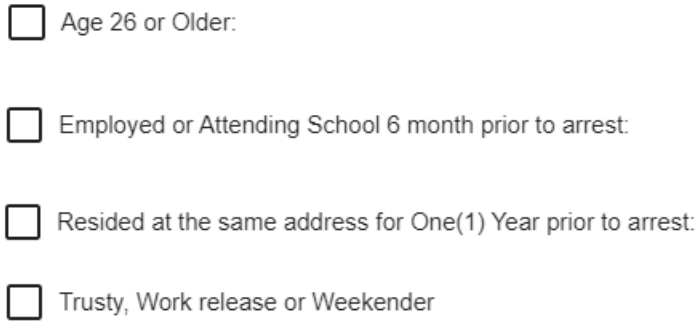
Add relevant **alcohol and/or drug abuse:**



If this is a reassessment, you may also have a **disciplinary conviction** listed as well:



Now you will add any **deduction** (stability) **factors** that reduce the score for the evaluation.

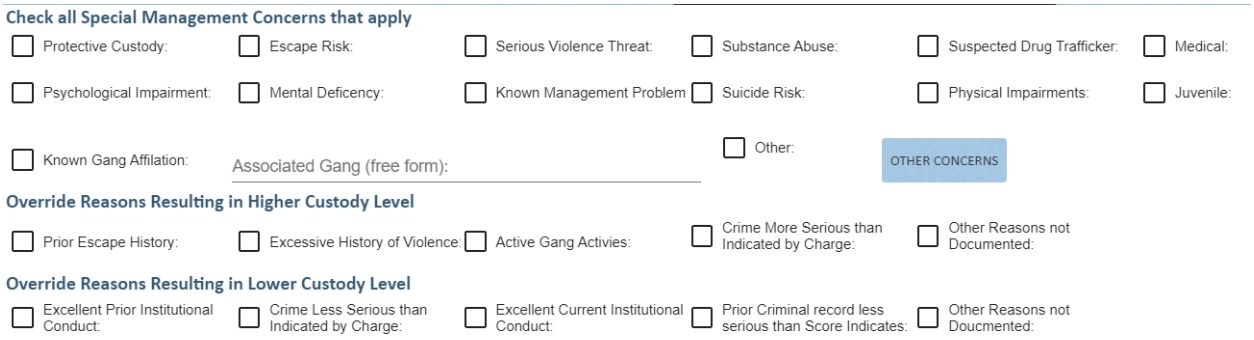


This will create a score and classification for the inmate. See *Scoring* for more information.

Management Summary



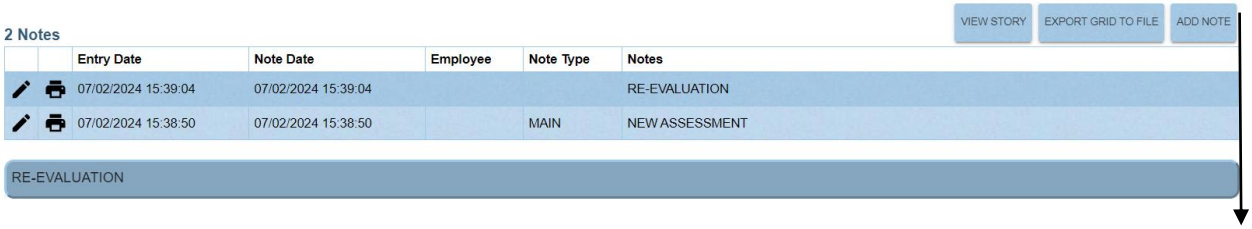
Use the *Management Summary* tab to add any special concerns or reasons for changing the custody level from its recommended level. This section is optional but allows you to keep track of special considerations for the inmate that may change the housing level. Simply check any of the boxes that are relevant to management or custody changes.



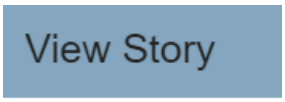
Notes



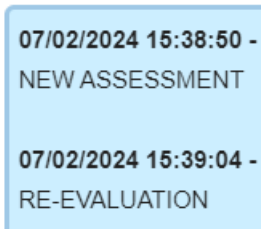
The **Notes** heading allows you to add various notes to this assessment. Click **Add Note** to add a new note to this charge. Double-click a current note to edit it. This heading is optional and available if needed for extra notes.







View Story allows you to see a compiled list of all the notes made for this assessment. This is useful if there are several notes available.





Incident History

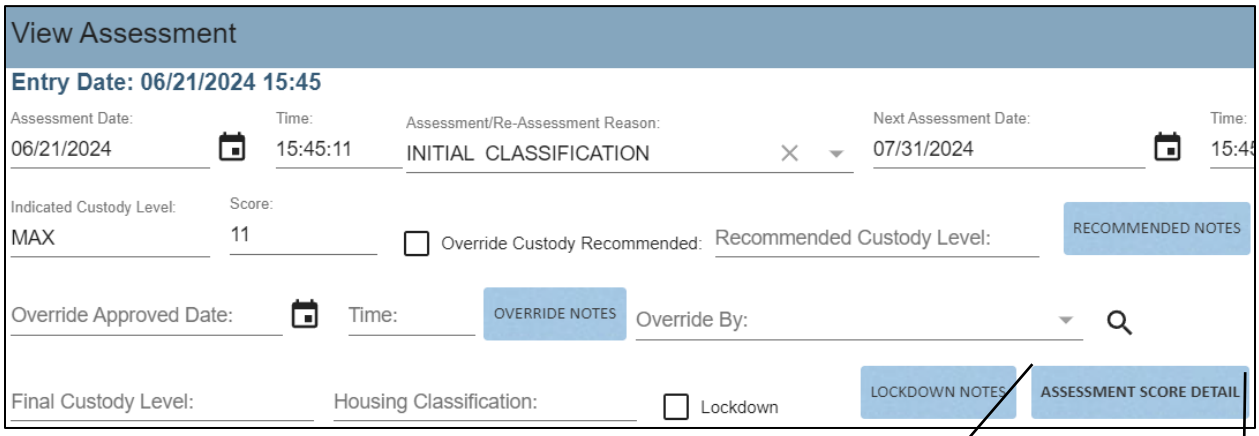


Incident History is a **read-only** tab that lets you view incidents that have been entered for this inmate as a convenience. Simply use this tab if you need to look up the incidents the inmate has been involved in.

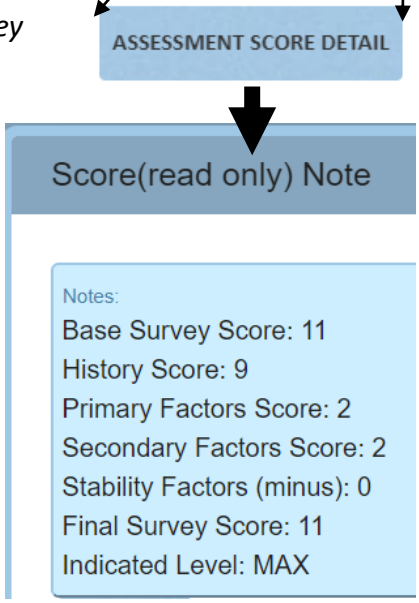
Scoring

Viewing Scores

On the **View Assessment** screen, click on the **Assessment Score Detail** button to view the scores that are calculated from the assessment:



iSOMS keeps track of three main scores during assessment: *Survey Score, Offense/History Score,* and *Factors.*



The ***Survey Score*** is the primary score that is displayed and used. It is created by adding all the values from the six dropdown fields on the *Evaluation* tab:

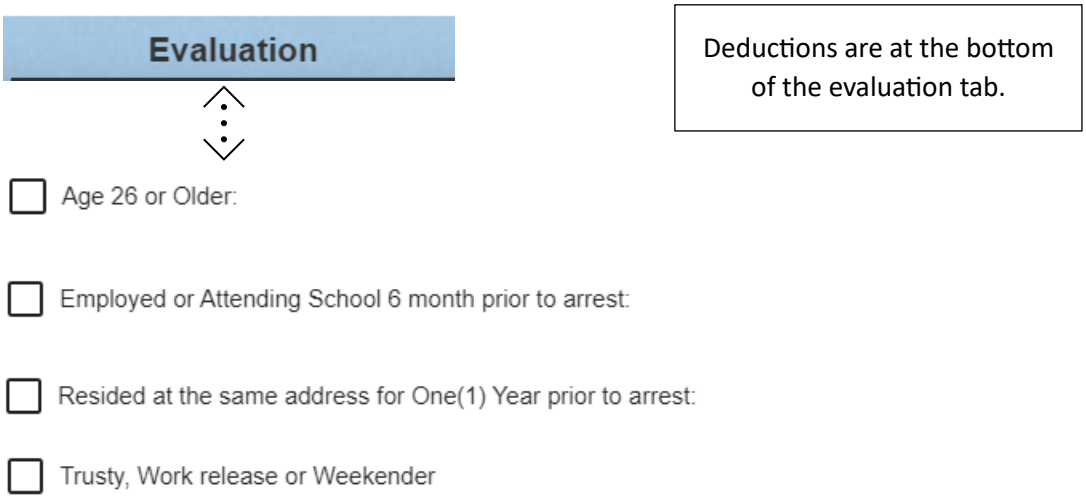
A. Severity of the current offense
B. Most serious prior conviction
C. Escapes or unauthorized absences
D. Disciplinary reports
E. Prior felony convictions
F. Alcohol and/or drug abuse

The ***Offense/History Score*** is tallied only by adding the first three fields in the evaluation:

A. Severity of the current offense
B. Most serious prior conviction
C. Escapes or unauthorized absences

The ***Primary and Secondary Factors*** scores are simply totals of how many primary and secondary factors were checked on the *Factors* tab.

Stability Score reduces the final score. When you check the *deduction* checkboxes (age or trusted statuses, for example), then the score will be reduced by 1 for each of these that was checked. The maximum that can be reduced is 4.

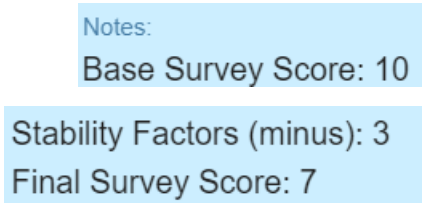


Calculating Scores and Indicated Levels:

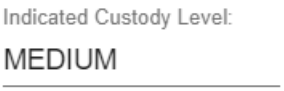
The **Final Survey Score** is the *Survey Score* minus *Stability (deduction) Score.*

For example, if you had a *Survey Score* of 10 and a *Stability Score* of 3, then the *Final Survey Score* would be 7.

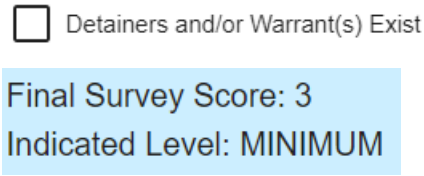
Survey Score (10) - Stability Score (3) = Final Survey Score (7)



The **Indicated Custody Level** will be determined by the *Final Survey Score:*



If the Final Survey Score is *less than* 6 and *Detainers and/or Warrants* **DO NOT** exist, then the indicated level will be **MINIMUM**.



If the Final Survey Score is *less than* 6 and *Detainers and/or Warrants* **DO** exist, then the indicated level will be **MEDIUM**.



Final Survey Score: 3
Level Changed Because Warrant Exists
Indicated Level: MEDIUM

If the Final Survey Score is *at least* 6 but *less than* 11 (6 through 10), then the indicated level will be **MEDIUM**.

Final Survey Score: 6
Indicated Level: MEDIUM

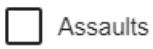
Final Survey Score: 10
Indicated Level: MEDIUM

If the Final Survey Score is *at least* 11, then the indicated level will be **MAXIMUM**.

Final Survey Score: 11
Indicated Level: MAX

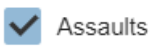
If the indicated level would be **MINIMUM,** but the *Assaults* checkbox is checked due to having a history of assaults, the indicated level will be changed to **MEDIUM.**

*Before **Assaults** is checked*



Final Survey Score: 5
Indicated Level: MINIMUM

*After **Assaults** is checked*



Final Survey Score: 5
Indicated Level: MEDIUM

If the ***History Score*** is *more than* 6, the indicated level will be set to **MAXIMUM** no matter what the other scores are because of the seriousness of the inmate's offense or history. In both of the below examples, the indicated level would normally be *minimum*, but the one with the high history score is changed to *maximum*.

History Score is 6 or less

Base Survey Score: 7
History Score: 5
Stability Factors (minus): 2
Final Survey Score: 5
Indicated Level: MINIMUM

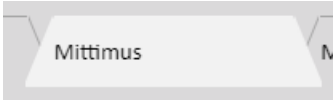
History Score is 7 or more

Base Survey Score: 7
History Score: 7
Stability Factors (minus): 2
Final Survey Score: 5
Indicated Level: MAX



IMPORTANT: If you add a *Recommended Custody Level,* then the *Score* will be ignored; the *Final Custody Level* will match the recommendation.

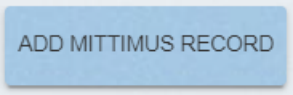
Mittimus Tab



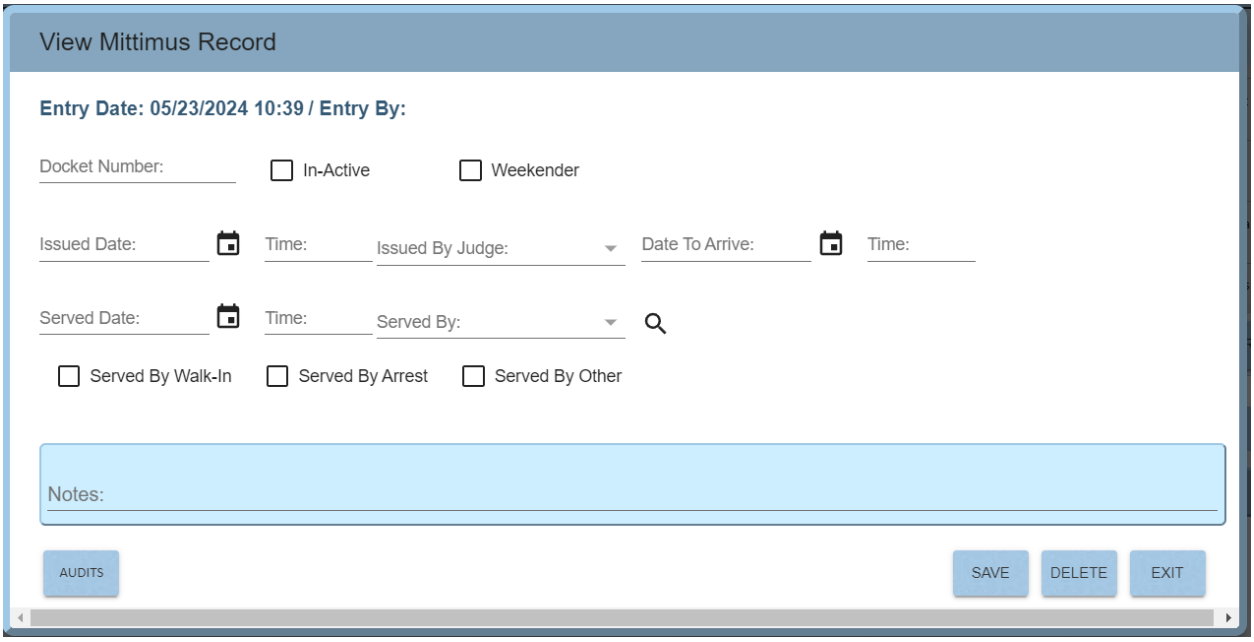
The **Mittimus** tab is where mittimus (e.g., a warrant for arrest) information that has been provided by the court can be viewed or entered. To view a current entry, double click on the record in the table.



Adding a New Mittimus Record

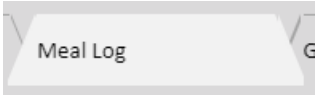


To add a new entry, click **Add Mittimus Record** in the upper right corner of the main tab.



Add the information for the Mittimus and click **Save** when finished.

Meal Log Tab



The **Meal Log** tab is where you can log the number and/or type of meals assigned to the inmate. To view an entry, double click it in the table.

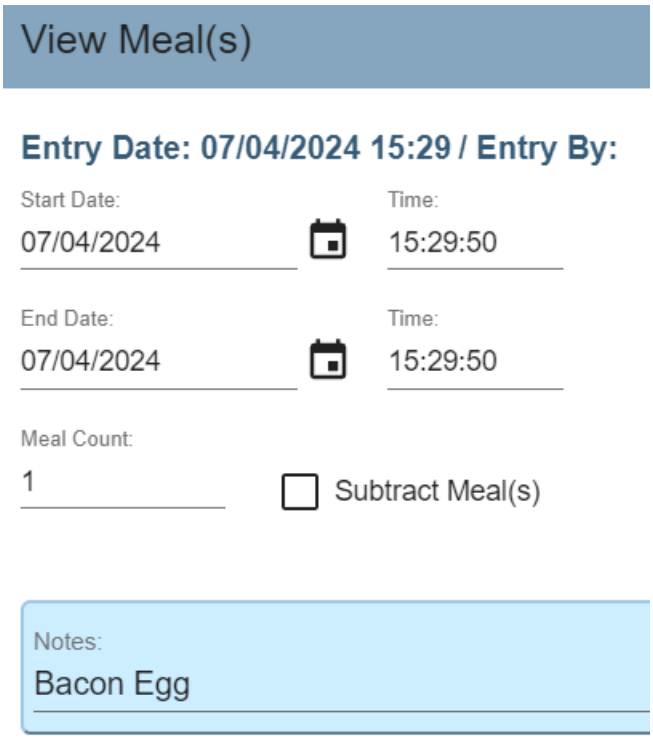


Adding a New Meal

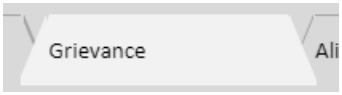
To add a meal, click **Add Meal** in the upper right corner.



This will bring up the meal editing window. Add **Meal Count** to keep track of the count, and **Notes** for any special notes if needed. This tab will usually be used for taking notes of specific meals that might be important to track or to count how many times a specific food item was given to a certain inmate.



Grievance Tab



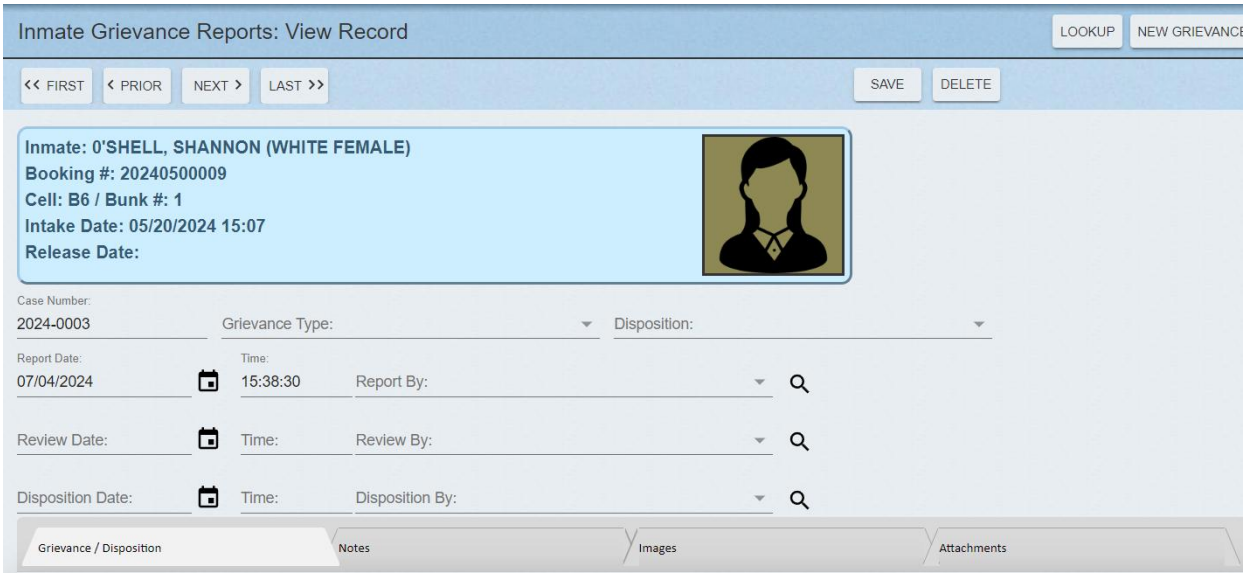
The **Grievance** tab can be used to view or enter any of the inmate's grievance reports. You will be able to view a brief summary of the grievance report; you may double-click the entry to open the full report (this will open a new window).

In this section…
Adding Grievance Reports
Grievance Report Info
Grievance Report Tabs

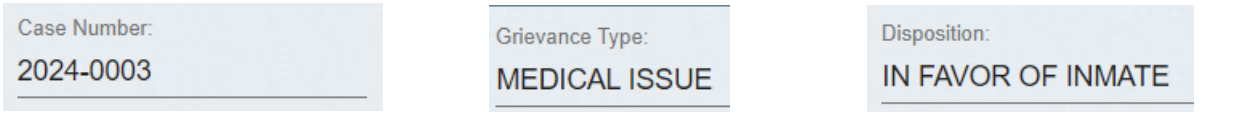


Adding a New Grievance Report

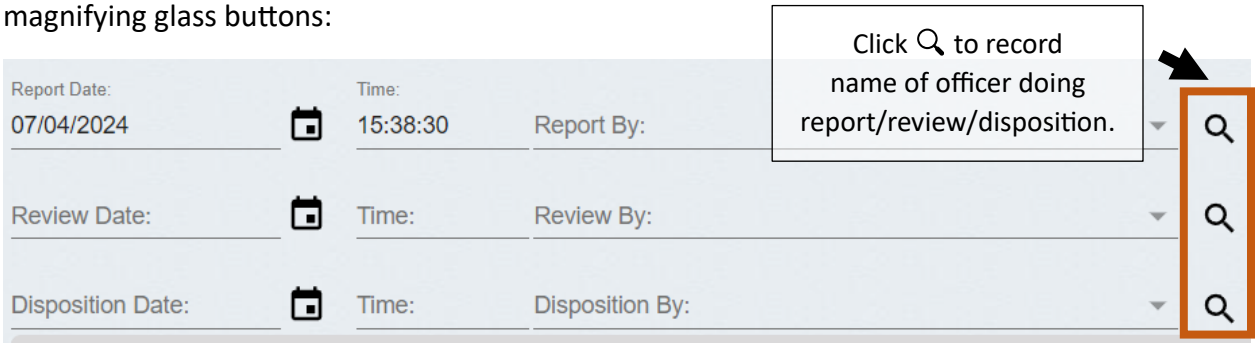
Click on the **Add Grievance Report** to add a new Grievance Report. This will open a new window for adding the grievance report. The top section is for filling out record information about the report, while the tabs are for adding pertinent information to the situation.



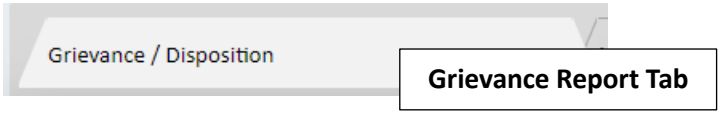
The **Case Number** will be filled in automatically, but you can change it if necessary. Add a **Grievance Type** from the dropdown menu. Once the grievance is settled, add the **Disposition** to record the way the grievance was settled.



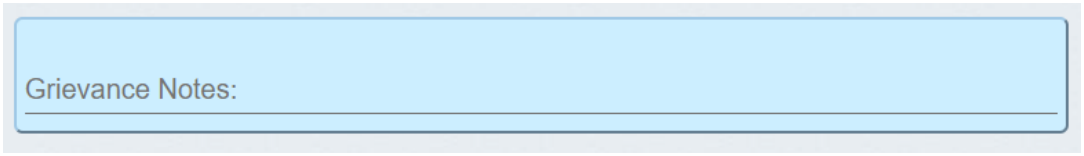
The other fields are to record when the report, review, and disposition were performed. You can lookup officers in the database to add who did each part of the report process by using the magnifying glass buttons:

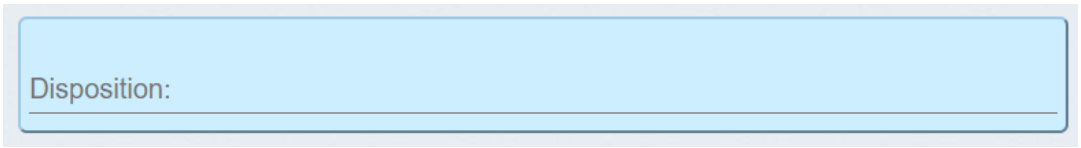


Grievance Report Tabs



Add notes related to the grievance and disposition here:

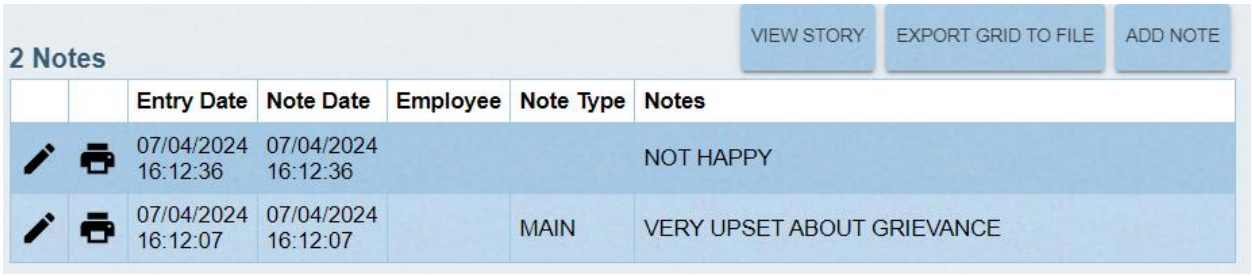






Grievance Report Tab

Add additional notes related to the grievance report here:





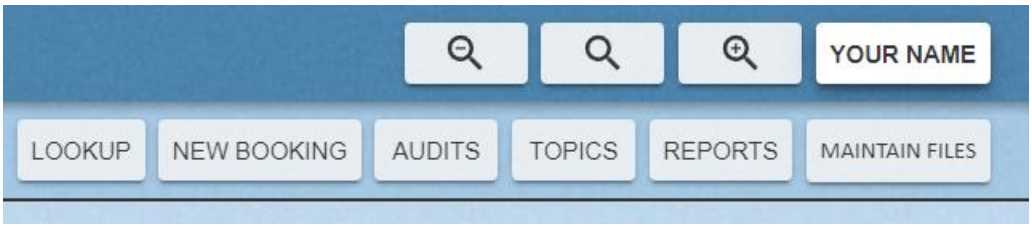
Grievance Report Tab

Add images related to the grievance report here.

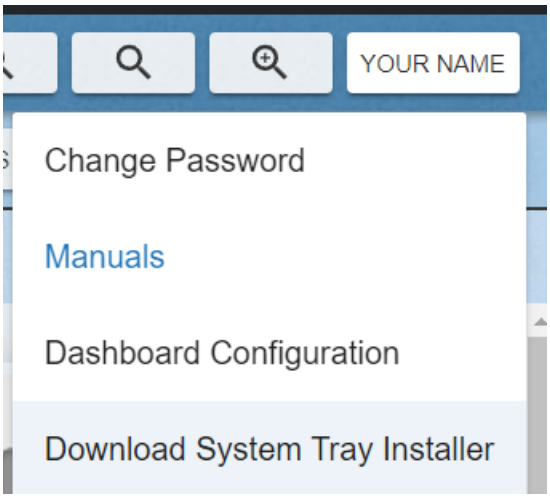
You can add a single image at a time or multiple images at a time.



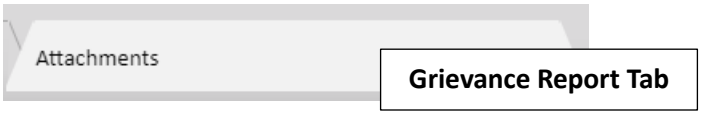
To add multiple images at a time, you will need the System Tray Installer downloaded to the computer you are using. The System Tray Installer can be found on the iSOMS home page by clicking on the button in the upper right with your username.



Once you click on that, you will get a drop-down list, and **Download System Tray Installer** is one of the options.



After you have the System Tray Installer on the computer, you can now use the **Add Images** button to upload multiple images at once if necessary.



Add attachments related to the grievance report here, such as related documents or paperwork.

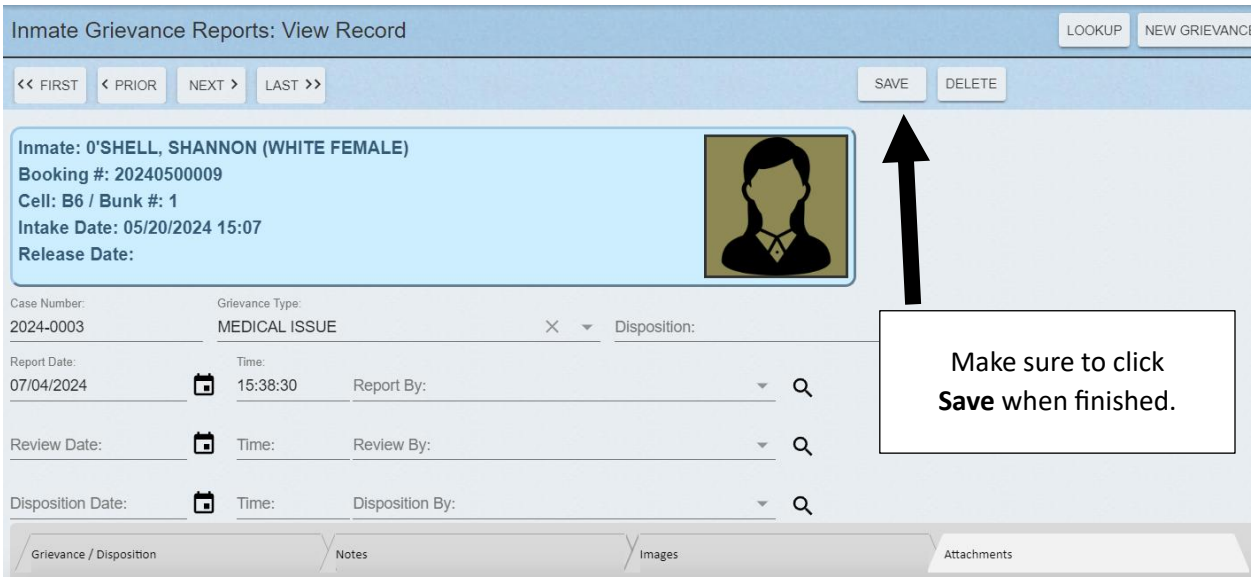
You can add a single attachment or multiple attachments at a time.

Just like above with images, you will need the System Tray Installer downloaded to the computer you are using to add multiple attachments at once. See the *Image* tab instructions on the previous page for instructions on installing the System Tray Installer.

You can also download attachments from this tab.



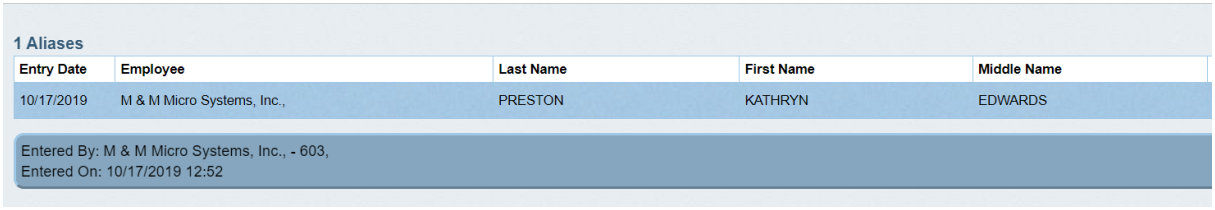
When you have finished with the grievance report, be sure to click **Save** at the top of the page to save the report. You can now return to the booking record in your original window.



Aliases Tab



The **Aliases** tab is used to view or enter any aliases the inmate uses or has used in the past. To view an entry, double click it in the table.

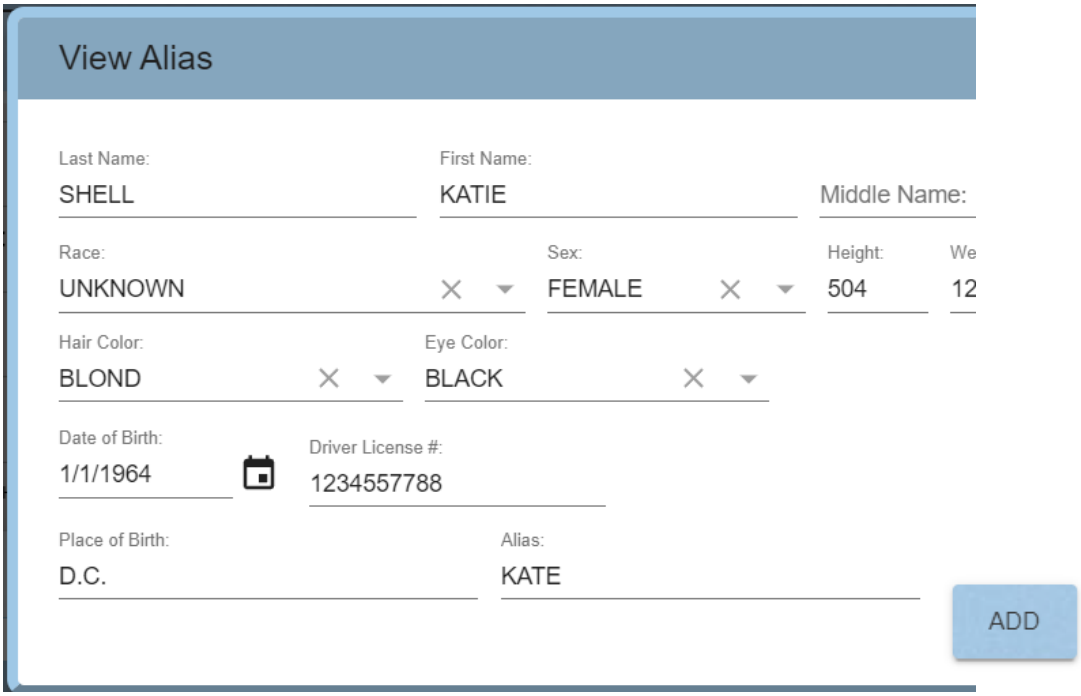


Adding a New Alias Manually



To add an entry, click **Add Aliases** in the upper right corner.

The **Last / First / Middle Name** fields are for the actual alias: the ***Alias*** field in the window is for nicknames of the assumed identity. Add information about the assumed identity or alias and then click **ADD** when finished.



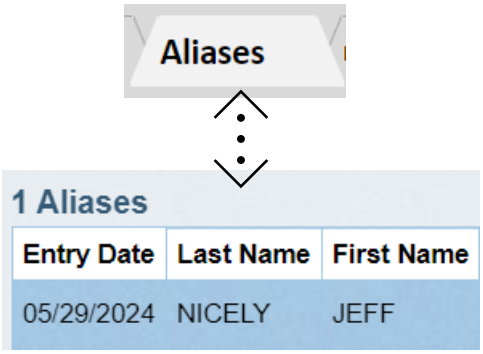
Aliases from Master Name

If you have merged two Master Names, the removed one will become an alias on the original's record. This keeps the original name record, which is especially useful when someone was going by a different name than their real name. Note the names listed here are for the alias: the name of the person will be stored in the main fields and not the alias tab.

ALIAS

Created by the merge

Under the Alias Tab



MASTER NAME

Original full name, not an alias

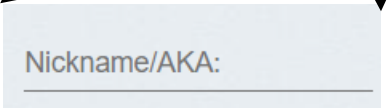
Under the main entry at page top



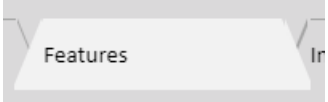
In the main fields at the top of the page (i.e. **NOT** under the Alias Tab), there is also a field for **Nickname/AKA**.



This is a place to put a nickname or common name for someone. What is important about this field is that when you search for an alias on the *Booking Search Screen,* it is looking in the **Nickname/AKA** field for the main entry. It does **NOT** search the Alias tab at all. Keep this in mind for searches.



Features Tab



The **Features** tab is used to view or enter specific features of the inmate, such as a scar or amputation. Double-click an existing entry to edit it.

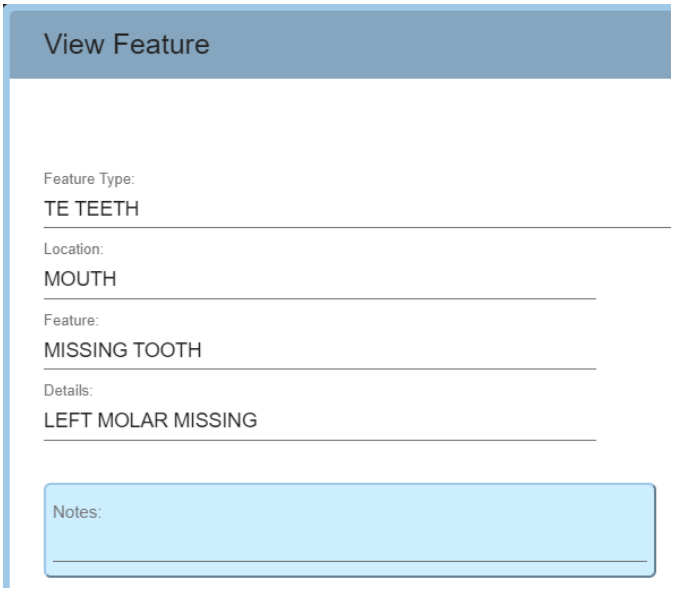


IMPORTANT: Features will also be imported from the Master Name if an existing Master Name was used to create the booking record. If features are updated in the *Features* tab in the booking record, it will not update the Master Name / Jacket. It is best if the information was entered ahead of time in the Master Name.

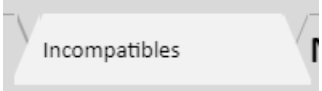
Adding a New Feature

To add a new feature, click the **Add Feature** button. In the new window, add the **Feature Type, Location, Feature,** and **Details**. You can also add a photo of the feature if appropriate, as well as any notes needed for later reference.

When finished, click **Save** at the bottom of the window to save the feature.



Incompatibles Tab

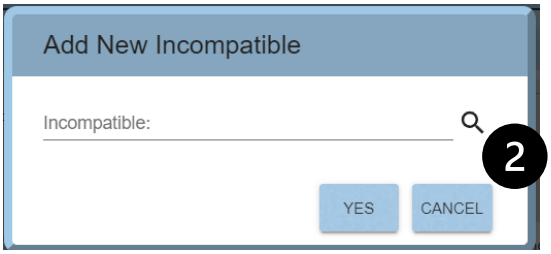


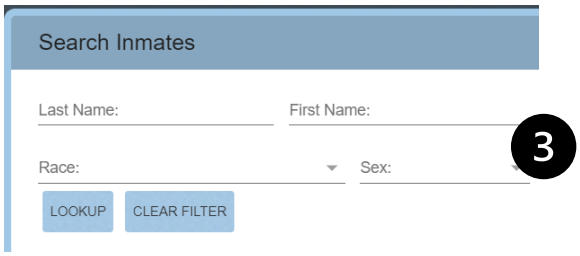
The **Incompatibles** tab is used to connect the booking records of other inmates who are incompatible with the current inmate. This is useful because when someone tries to assign incompatible inmates together, iSOMS will give them a warning so they are aware of the incompatibility.

Adding a New Incompatible

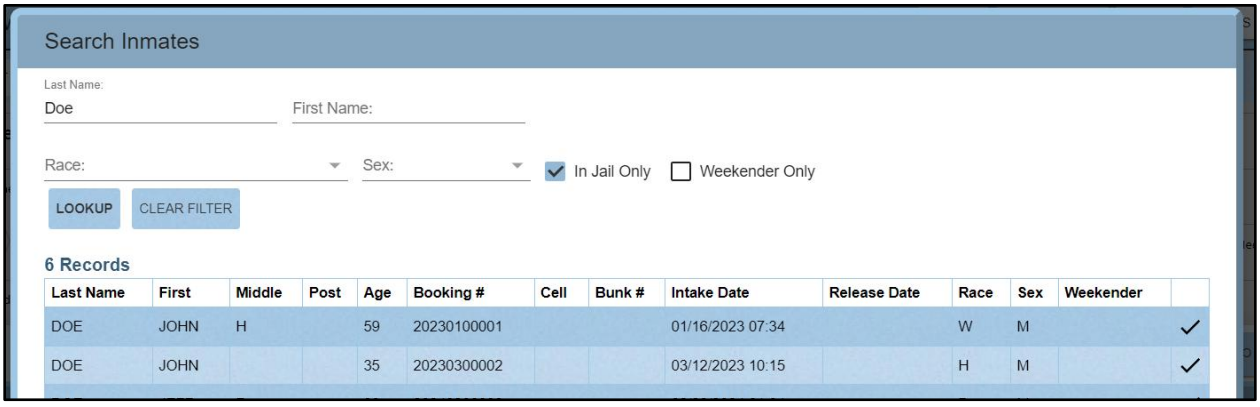
Click on **Add Incompatible** to add a new record. On the pop up screen either enter a name or click on the magnifying glass icon to search for the name of the inmate who is incompatible with the inmate you are booking.



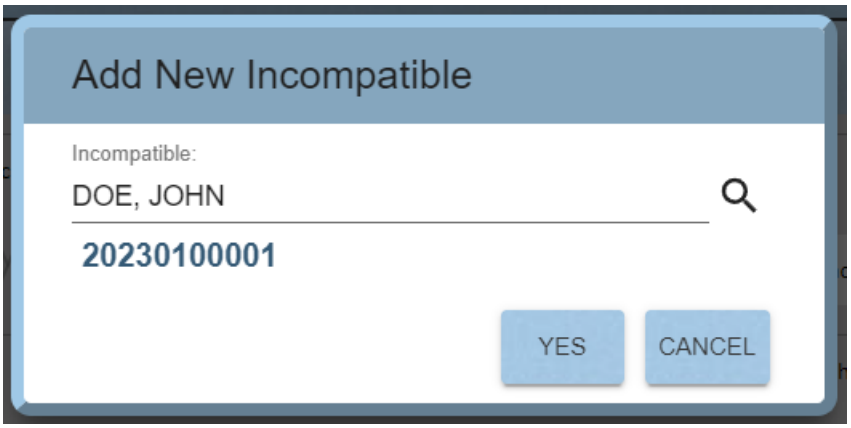




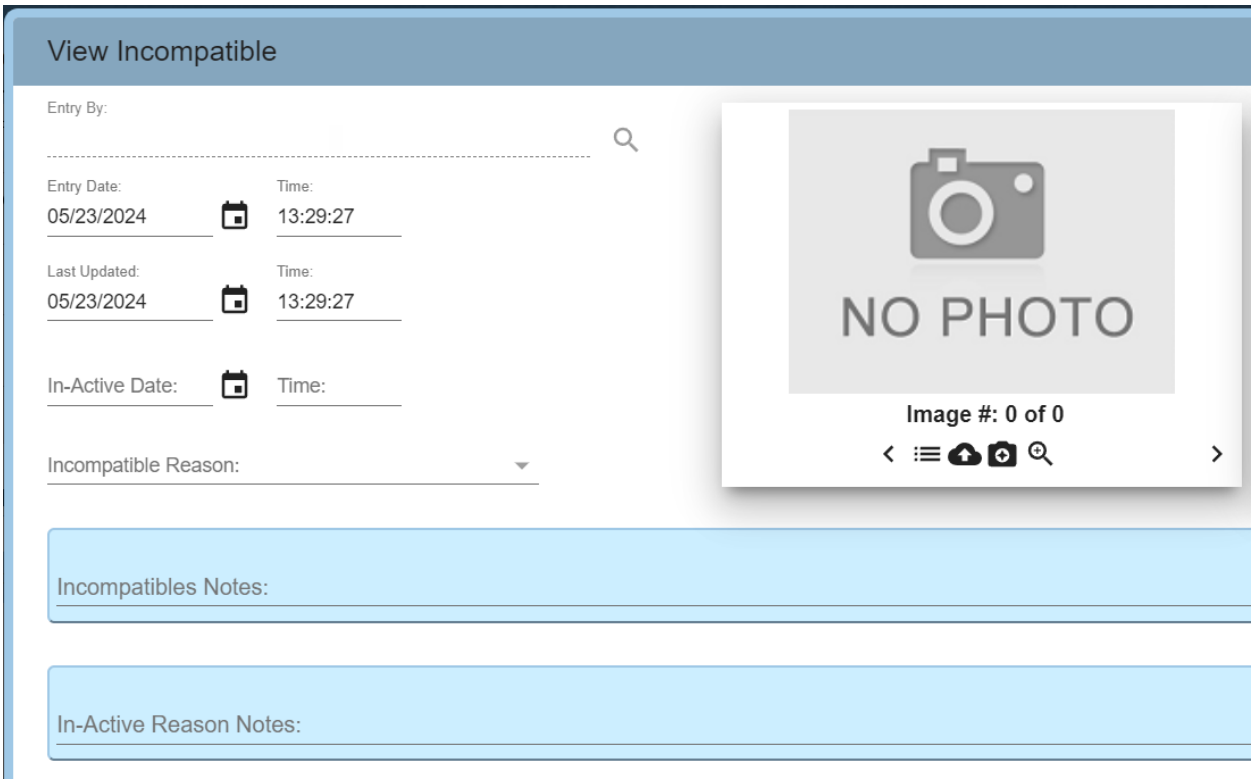
If you are searching on the above screen, enter the search criteria and click **Look Up**. This will bring up a list of inmates to choose from.



Double-click on the inmate you want to add, and then click **Yes** when back at the Add New Incompatible pop up.



On the following screen, you can enter more information such as incompatible reason and incompatible end date if the incompatible reason is temporary. Photos and notes can also be added. Once the record is filled in, click **Save** at the bottom of the screen and then **Exit**. The Incompatible entry will be added to both inmate's bookings when you add it under one of the inmate's records.

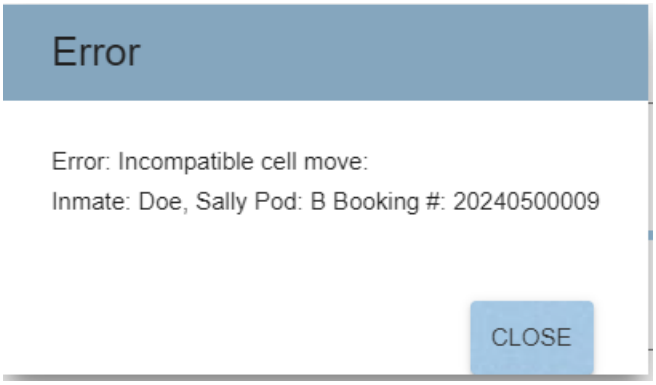


Incompatible Example

Once an incompatible is entered, anyone accessing the records will receive a warning if they try to move incompatible inmates into the same pod. For example, if we add *A. Smith* as incompatible to *Sally Doe:*



Then if anyone tries to move both *Smith* and *Doe* into the same cell, the following warning will appear:

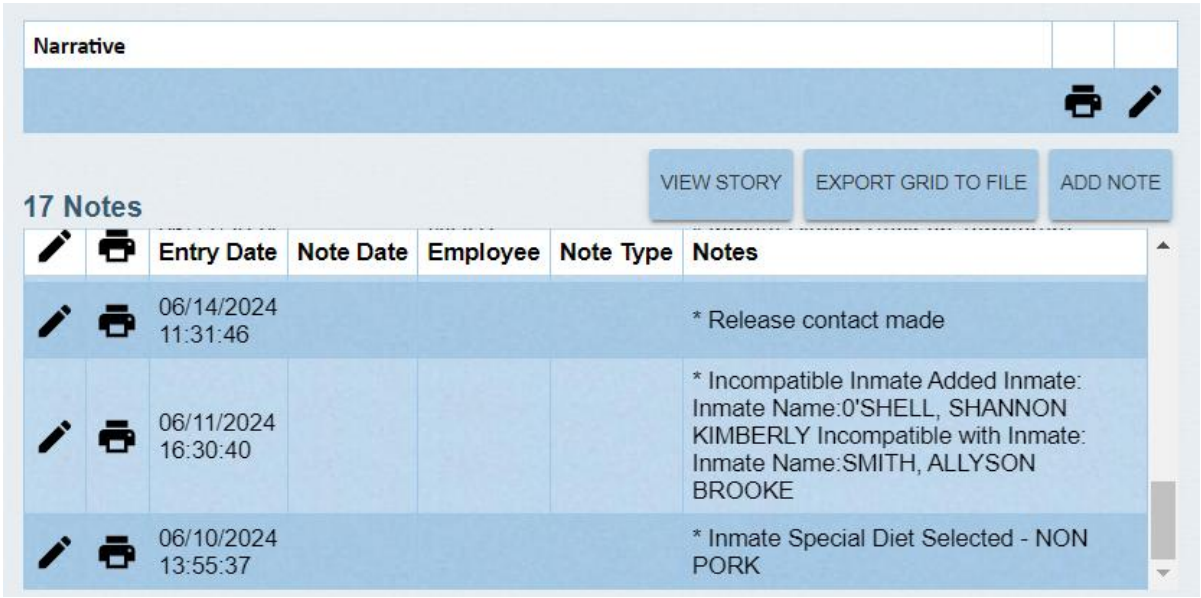


This helps others know not to combine these inmates in the same cell in case they are not familiar with either of the inmates.

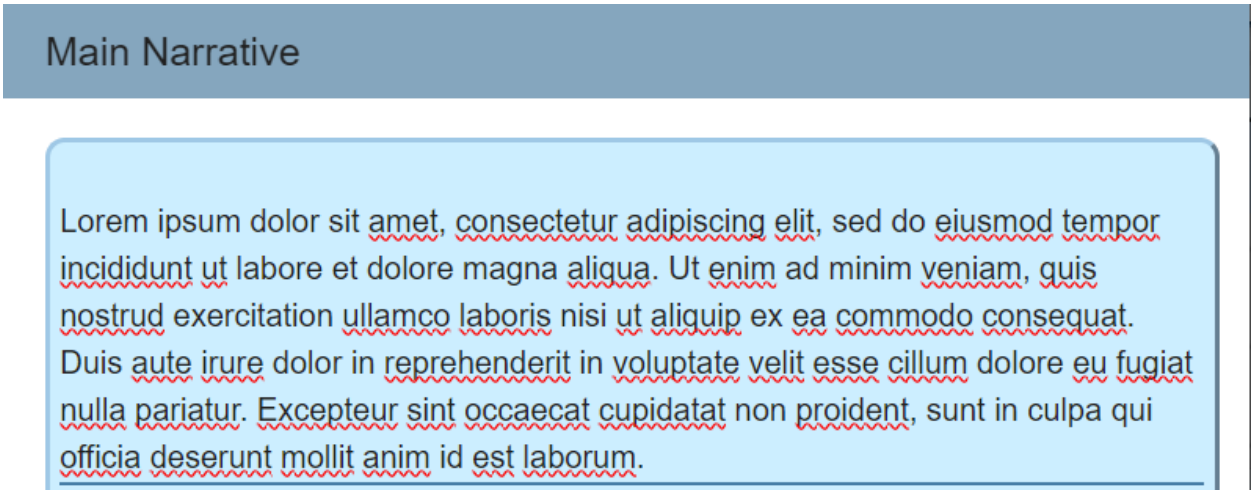
Notes Tab



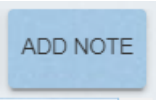
The **Notes** tab is used to view or add notes pertinent to the booking. Many of these notes will be automatically added as you fill in the booking record. Double-click on any entry in the table to edit or view it.

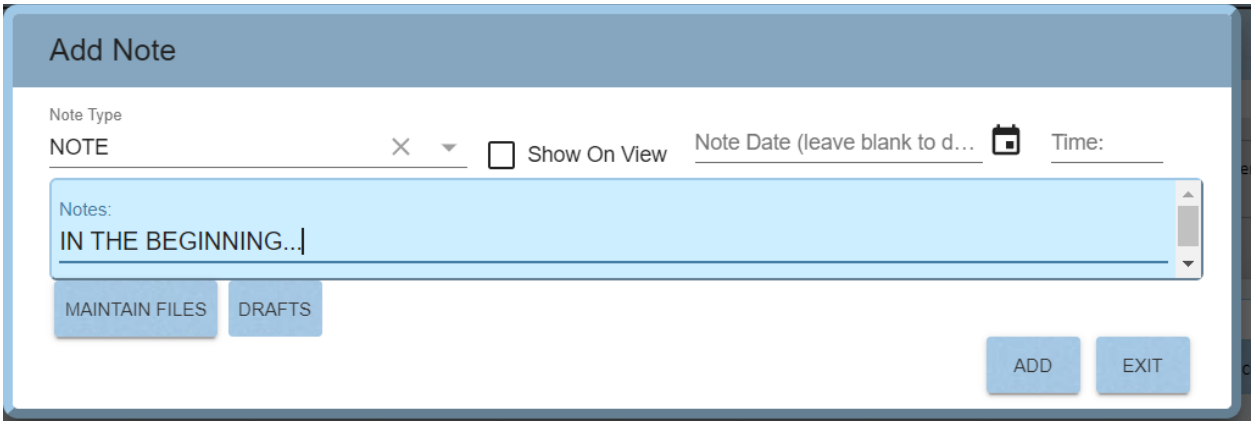


Narrative acts as an area where you can add a long note. This is useful when you want to add important or long form notes that won't be mixed in with the rest of the short notes.



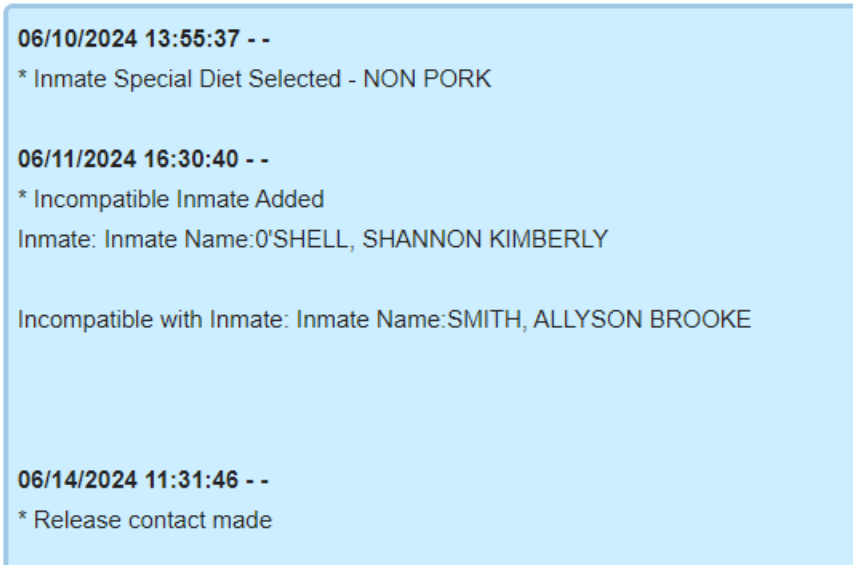
Use **Add Note** to add a new note.





The **View Story** button will show all notes (except Narrative) that have been added on one page.





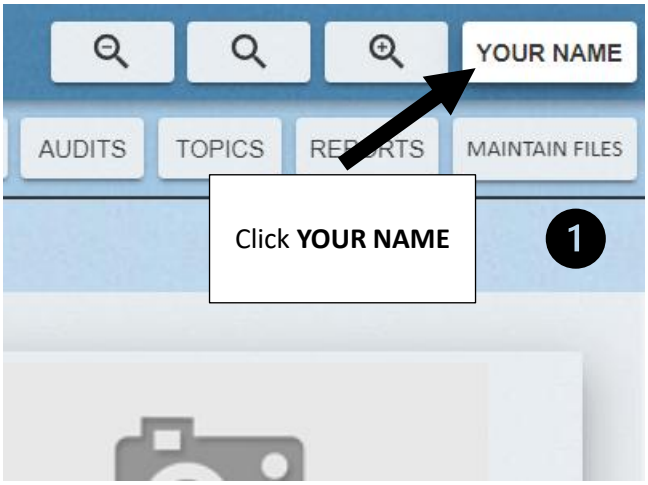
Images Tab

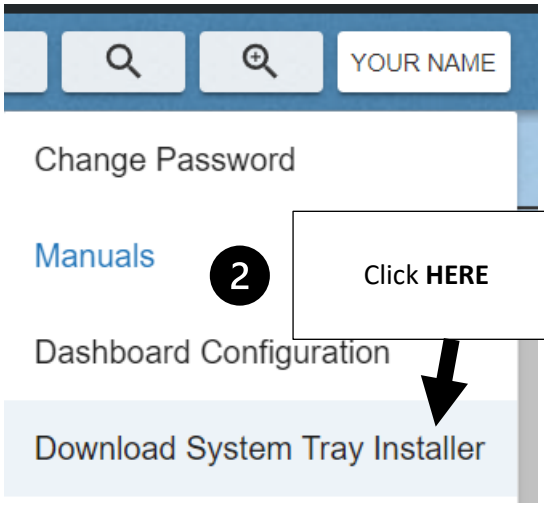


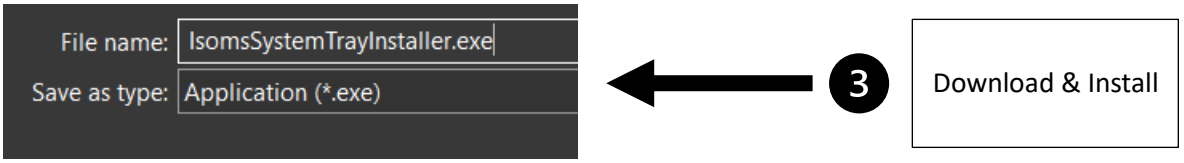
The **Images** tab is used to view, download, or add images. These images are normally for identifying or medical information, such as images of specific features of the inmates such as tattoos, piercings, or injuries. You can add a single image at a time or multiple images at a time. Click **Add Image** to add a single image.



To add multiple images at a time, you will need the System Tray Installer. The System Tray Installer can be found on the iSOMS home page by clicking on the button in the upper right with your username. Once you click on that, you will get a drop-down list, and **Download System Tray Installer** is one of the options. Download and install it on this computer.

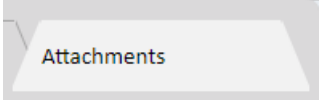




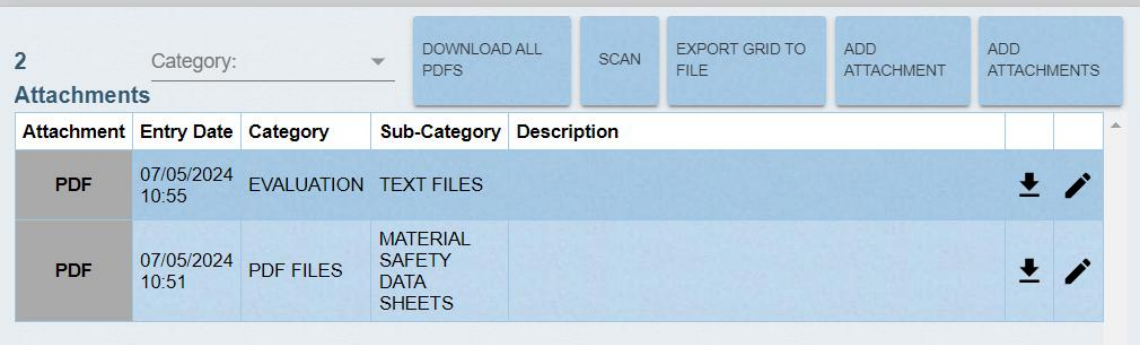


After you have the System Tray Installer on the computer, you can now use the **Add Images** button to upload multiple images at once if necessary.

Attachments Tabs



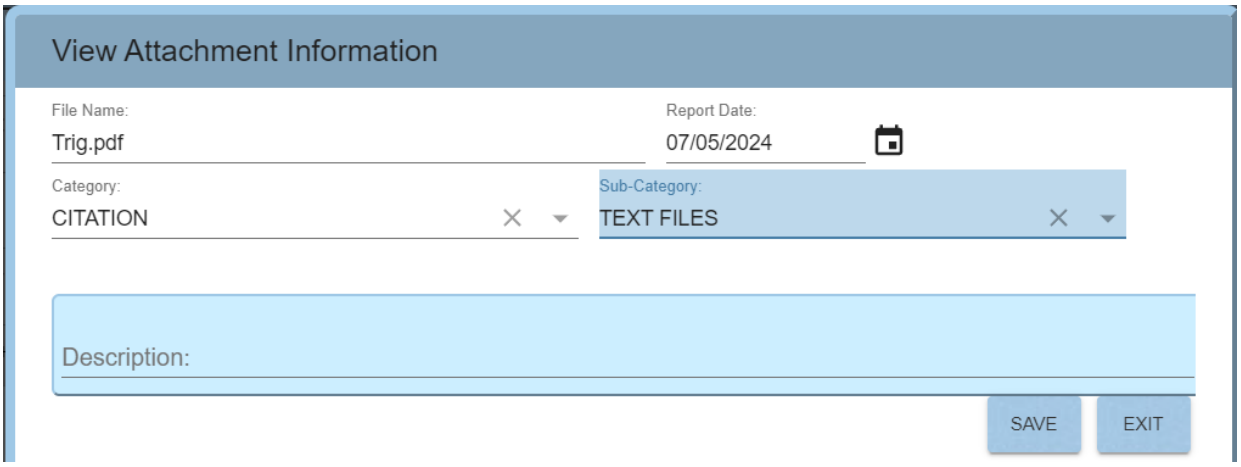
The **Attachments** tab is used to view, download, or add attachments, such as other files besides images associated with an inmate. Double-click a file entry to view the record for the attachment or click on the icon to download the attachment to the computer.



You can add a single attachment at a time or multiple attachments at a time. Just like above with images, you will need the System Tray Installer downloaded to the computer you are using to add multiple attachments at once. See the *Image* tab instructions on the previous few pages for instructions on installing the System Tray Installer.

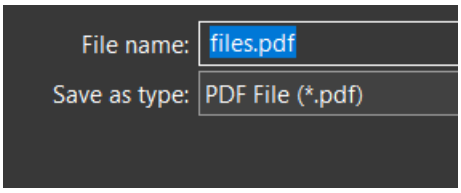
Click **Add Attachment** to add a single attachment or click **Add Attachments** to add multiple attachments at the same time. Choose the attachments from the computer, then add the appropriate category and sub-category for the file.



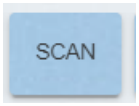


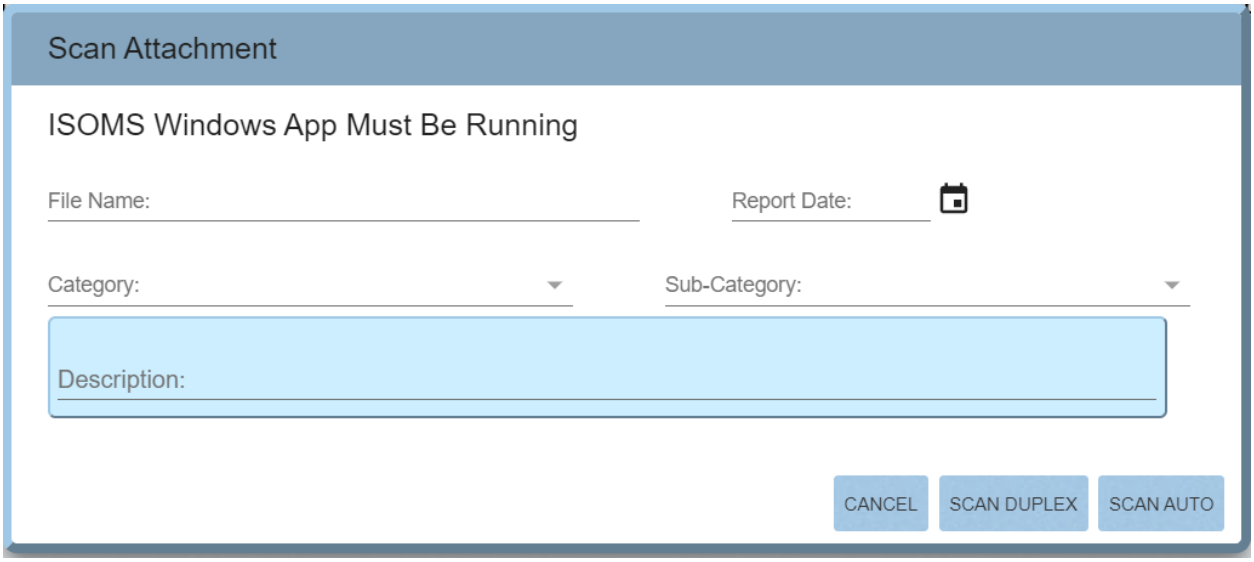
You can also **Download All PDFs** at once by clicking the appropriate button.



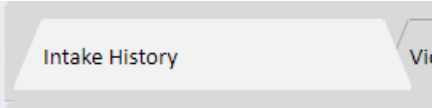


If you have the iSOMS Windows App, you can use **Scan** to scan files into the attachments.





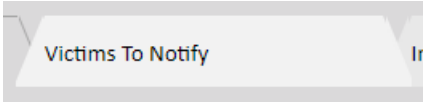
Intake History Tab



The **Intake History** tab will display every previous time this inmate has been booked into your facility. **This is a read-only tab.**



Victims to Notify Tab



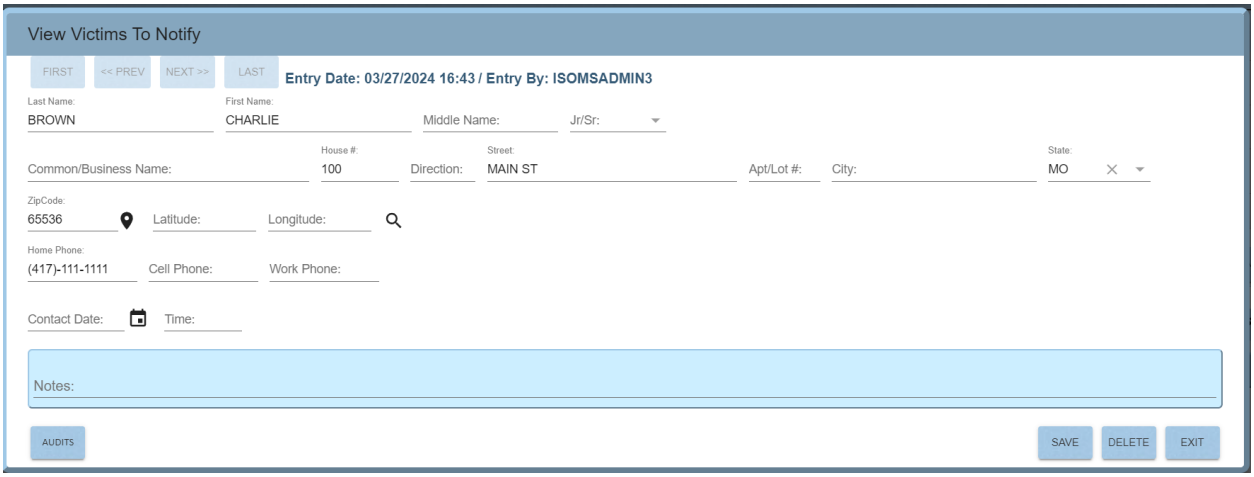
The **Victims to Notify** tab is used to view or enter information about victims who need to be notified prior to the inmate's release. Information can be pulled automatically from this tab for the victim notification program. Double click a current entry to edit it.



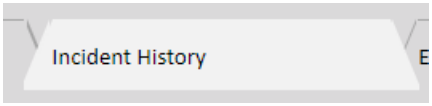
Adding a New Notification

Click **Add Victim** in the upper right corner of the main tab to add a new entry. Fill out the needed information and click **Save** to save the entry.



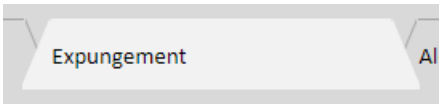


Incident History Tab

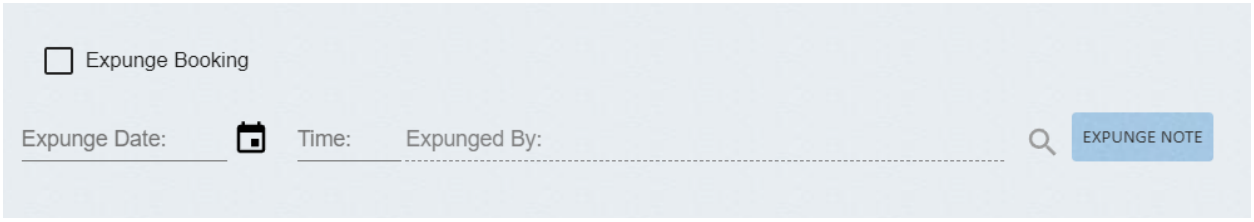


This tab will display a history of incidents for this inmate. **This is a read-only tab.**

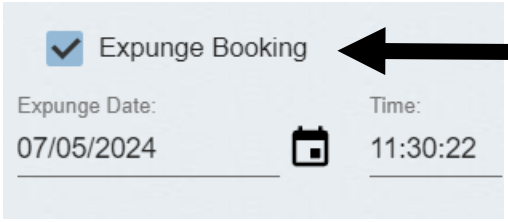
Expungement Tab



The **Expungement** tab is used if a court order has been issued to expunge the complete booking record. There is also an expungement option under the **Charges** tab on page for expunging individual charges without expunging the entire booking record. See page 87 and following for more details. You should use this tab if you need to expunge the entire booking record.



Checking **Expunge Booking** allows Agency Super Users and Booking Super Users to expunge this entire booking. Only users with these security privileges can see the record once it has been expunged – all other employees will not see the booking if the **Expunge Record** checkbox is checked.



Check this box to expunge the charge.

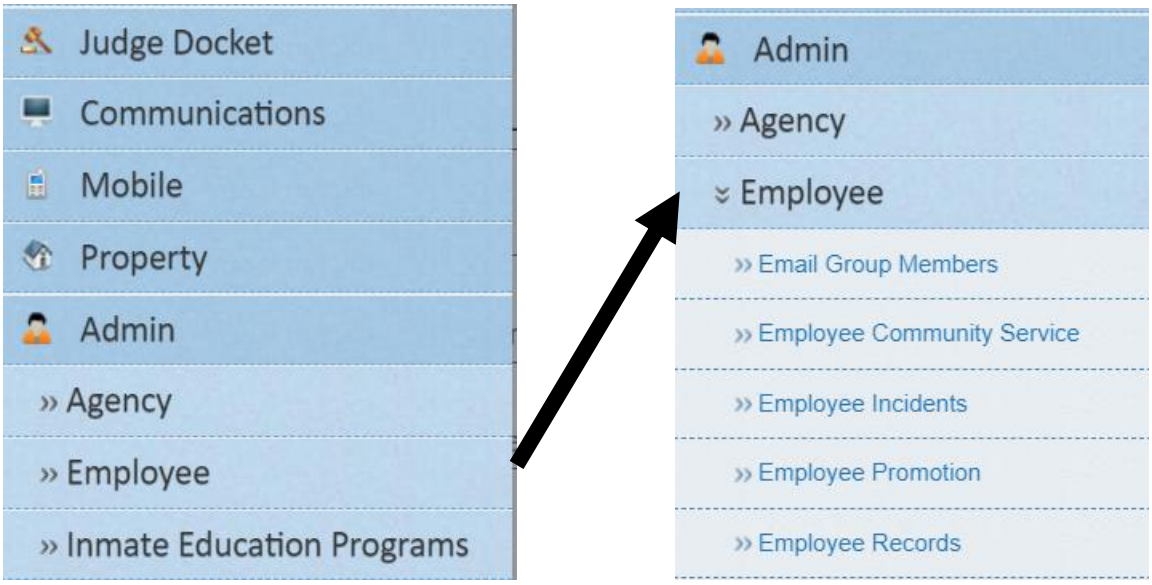
Users with the proper security privileges will still be able to see the record, but users without expungement security privileges will *not* see the expunged record.

If the record was improperly or accidentally expunged, a Super User or an employee with expungement permissions can uncheck the box. After this, the record will be visible to all users again.

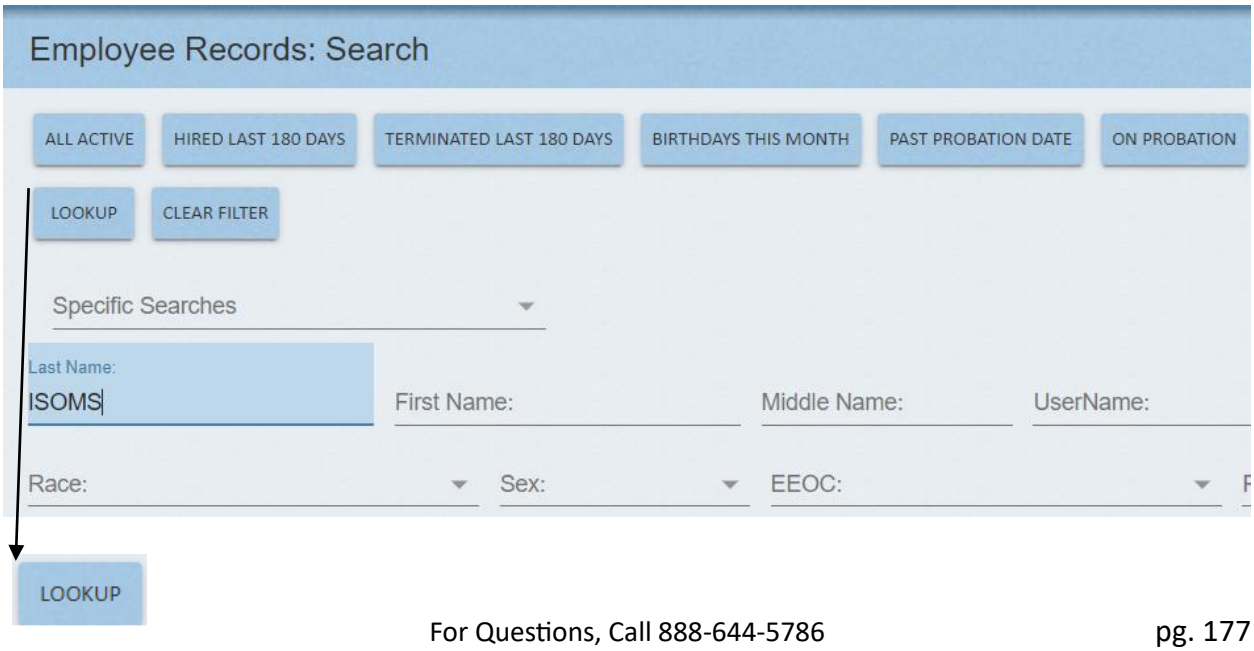
Adding Expungement Permissions

A Super User can give an employee expungement permissions, so they can see and expunge records. To add expungement permissions, navigate to:

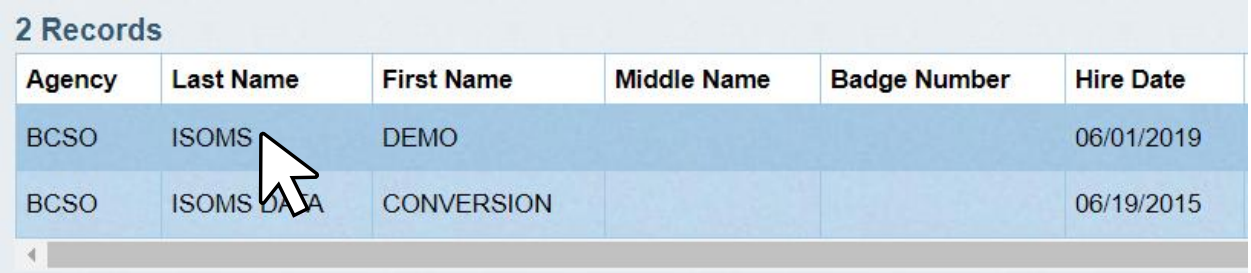
Admin → Employee → Employee Records



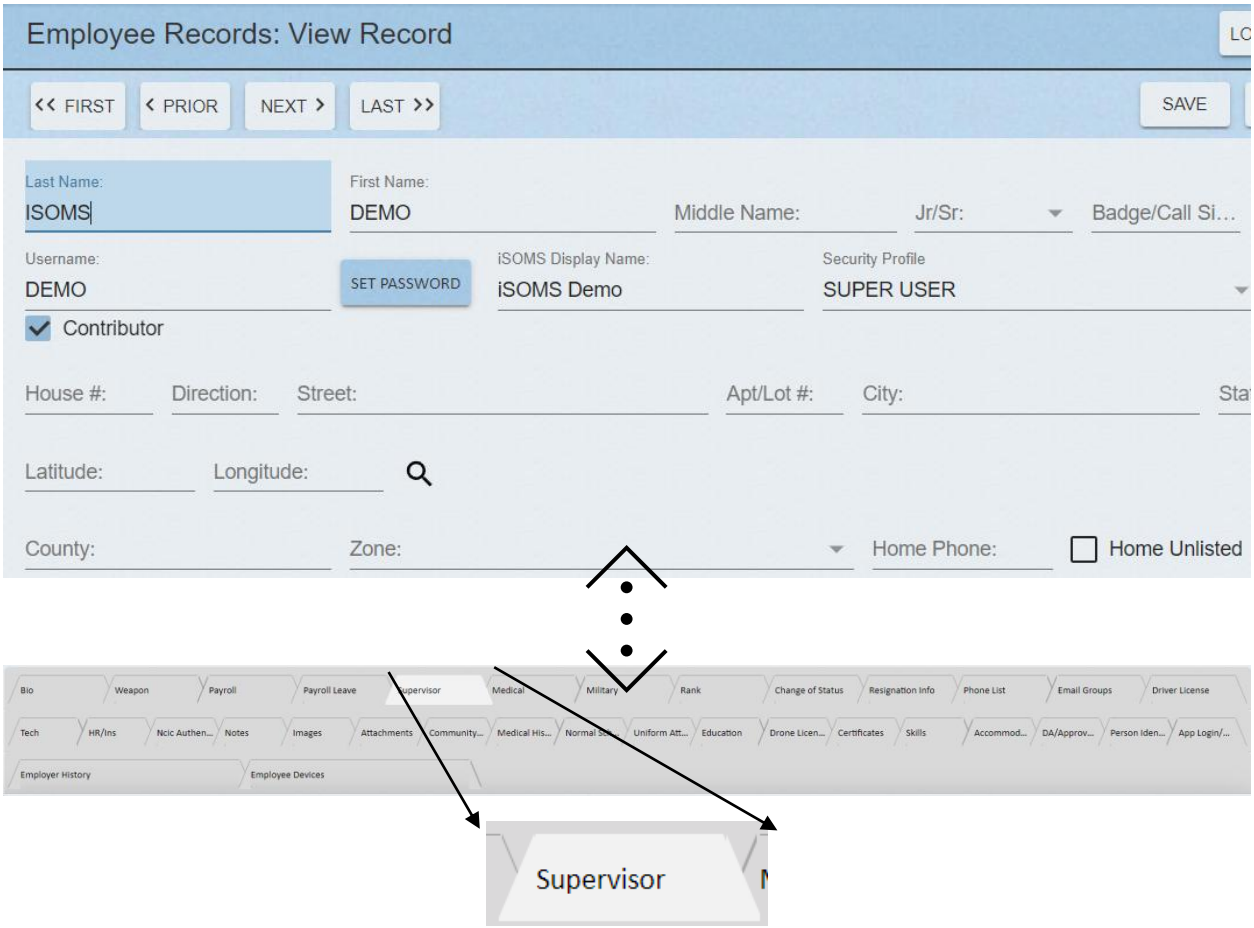
This will open the **Employee Records Search Screen**. Enter any search parameters you need to find the employee to whom you are adding Expungement Permissions, and then click **LOOKUP.**



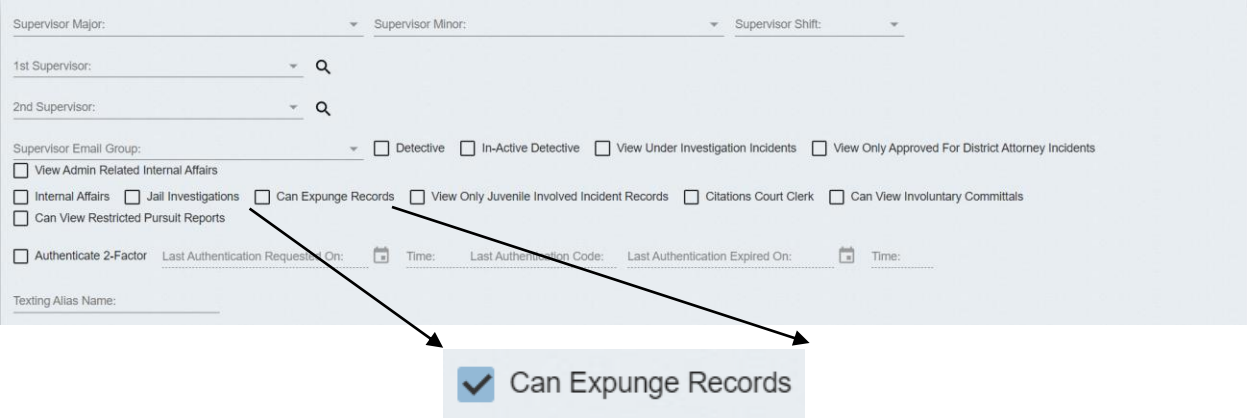
Double-click on the employee you are looking for in the list:



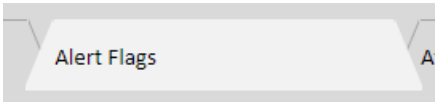
This will open their **Employee Record**. Scroll down and click on the **Supervisor** tab:



When you click on the Supervisor tab, you will see the below screen. Find the **Can Expunge Records** checkbox and click it. Now this employee can view expunged records and expunge charges and records. See the *Permissions* section of page X for more information on Super Users and permissions.



Alert Flags Tab



The **Alert Flags** tab is used to view or add alert flags that will create pop up warnings when anyone uses the Master Name that is on the booking record. These flags can be used to make sure other users know critical information. Contact information can be added if a particular person should be contacted when the warning pops up. See the **Alert Flags** section on page 70 to see how to add alert flags.

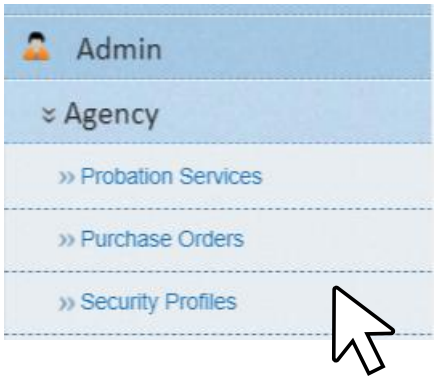


Medical Permissions

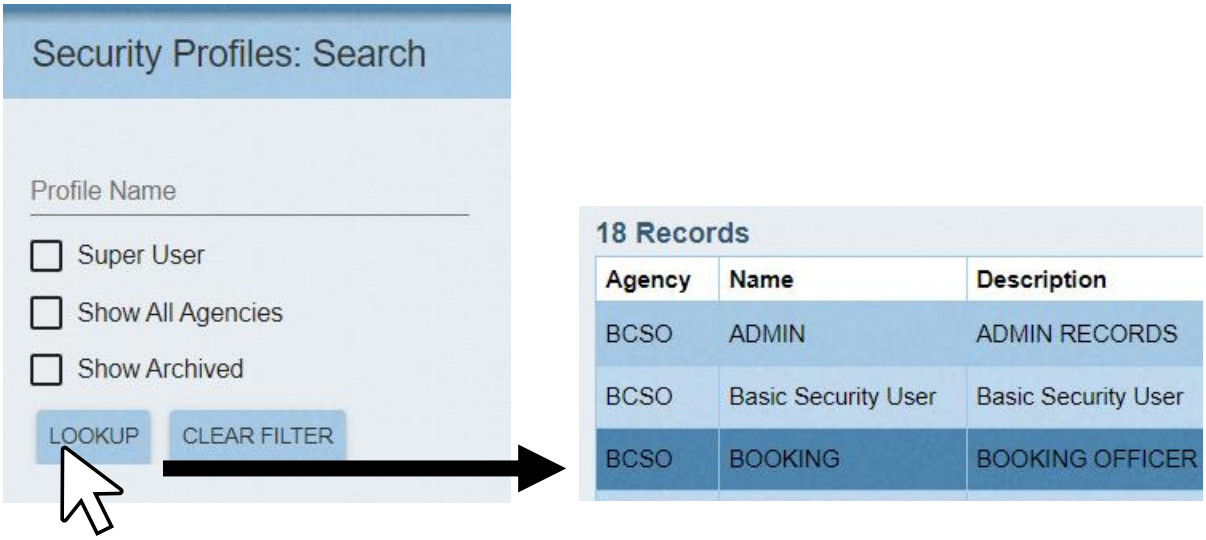
Some of the following tabs need medical (or medical adjacent) permissions. These permissions exist so that only proper staff have access to necessary medical information. These permissions are added via the security profiles system. Each user in the iSOMS system has a security profile associated with their account, so you must add permission to allow them to view and edit the medical entries if your agency uses iSOMS for medical records.

To begin adding permissions, a Superuser can navigate on the home screen menu to:

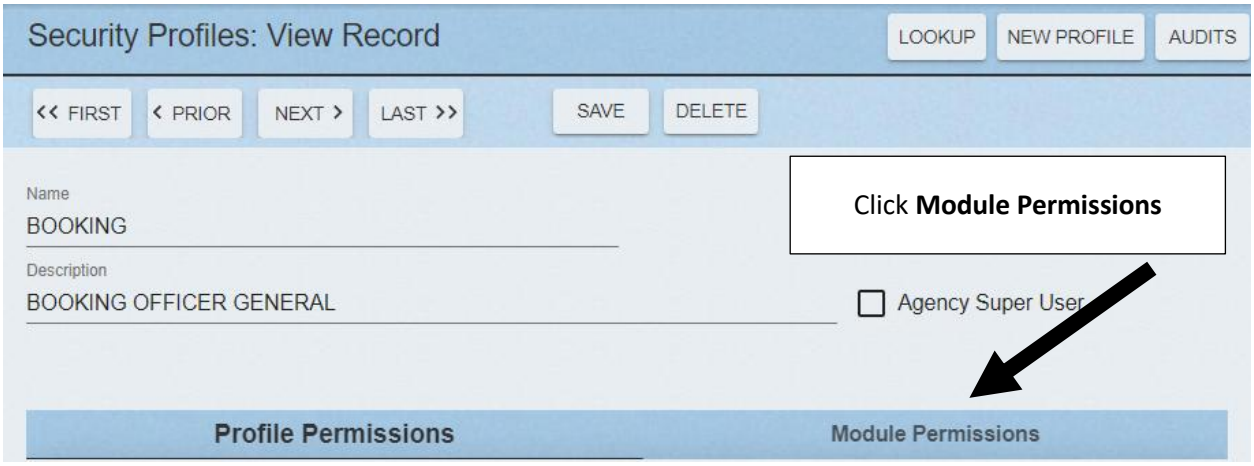
Admin → Agency → Security Profiles



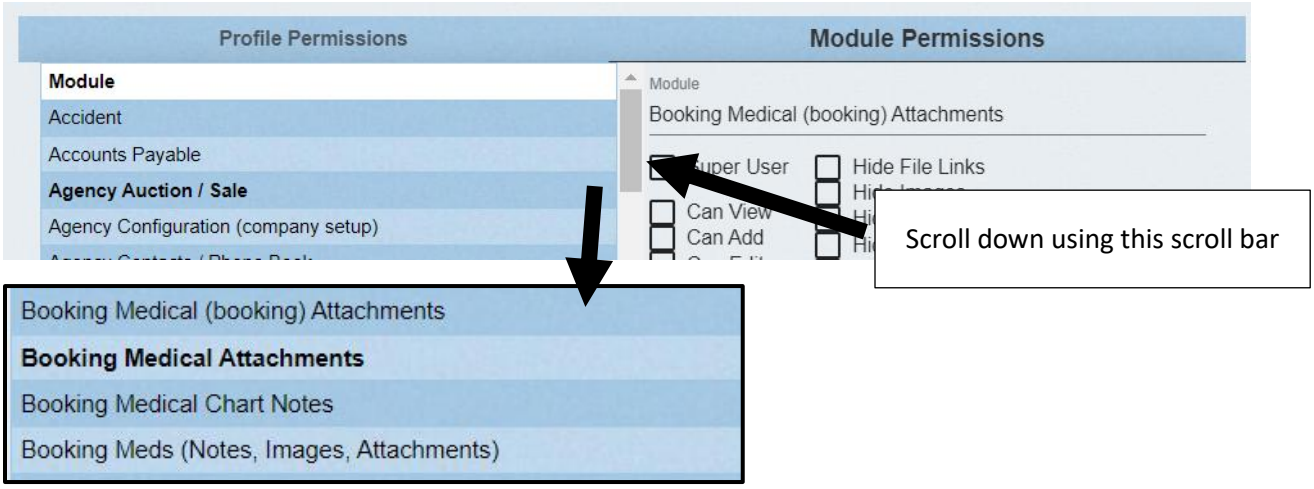
This will open the security profiles search screen. Click **Lookup** and double-click the security profile you want to edit:



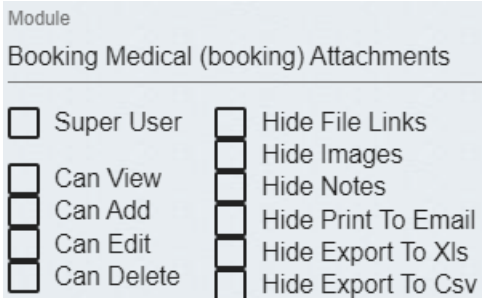
Click on the **Module Permissions** button on the following screen:



This will open a long list of module permissions. You will want to scroll down until you find the *Booking Medical* entries.



Permissions can be added by clicking the one you want to edit, and then clicking the appropriate checkboxes. Click **Can View** to allow viewing the records, **Can Add** to allow adding the records, **Can Edit** to allow editing the records, and **Can Delete** to delete the records.

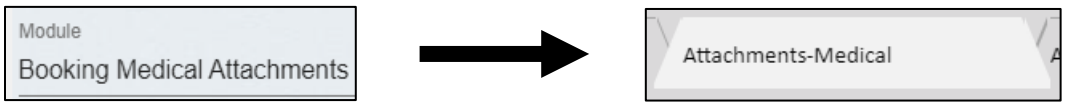


The four types of permissions work as follows:

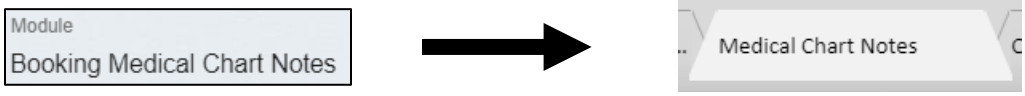
Booking Medical (booking) Attachments – These permissions allow viewing and editing attachments under the *Attachments (Booking) Medical* tab. This is for less sensitive (but still medically relevant) information.



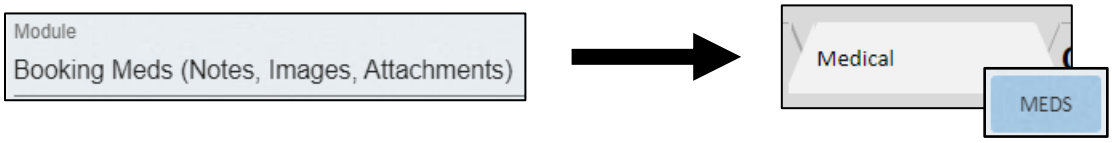
Booking Medical Attachments – These permissions allow viewing and editing attachments under the *Attachments Medical* tab. This is usually for medical staff to add attachments that is more sensitive than the other tab.



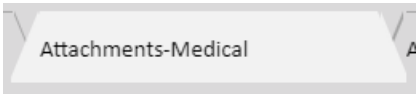
Booking Medical Chart Notes – These permissions allow viewing and editing notes under the *Medical Chart Notes* tab.



Booking Meds – These permissions allow viewing and editing information about medicine for the inmate, found under the *Medical* tab.



Attachments-Medical Tab



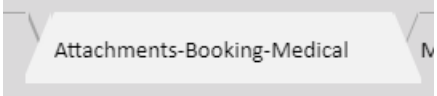
The Attachments-Medical tab is where specific medical attachments and files can be **added and viewed by medical staff (or staff with medical permissions) only**. To view more information on permissions, see the section on *Medical Permissions* on the previous three pages.



Attachments can be added one at a time or multiple attachments can be added at once. To add multiple images at a time you will need the System Tray Installer downloaded to the computer you are using. (See the entry for the Images tab on page 171 for more information on how to get the System Tray Installer.) Any medical attachments that have been added to the record here can also be downloaded.

WARNING: Only medical staff can add or see information underneath this tab. You should use the next tab (Attachments-Booking-Medical) for information that is not restricted to the medical staff.

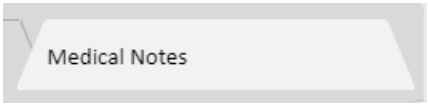
Attachments-Booking-Medical Tab



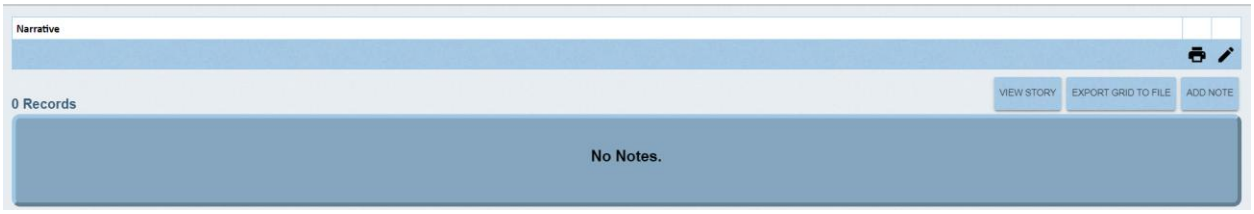
The Attachments Booking Medical tab is where medical attachments and files that are not restricted only to medical staff can be viewed, downloaded, or added. As above, the System Tray Installer would need to be downloaded to attach multiple attachments at once. **There is still a security profile permission necessary to view these attachments.** To view more information on permissions, see the section on *Medical Permissions* on the previous three pages.

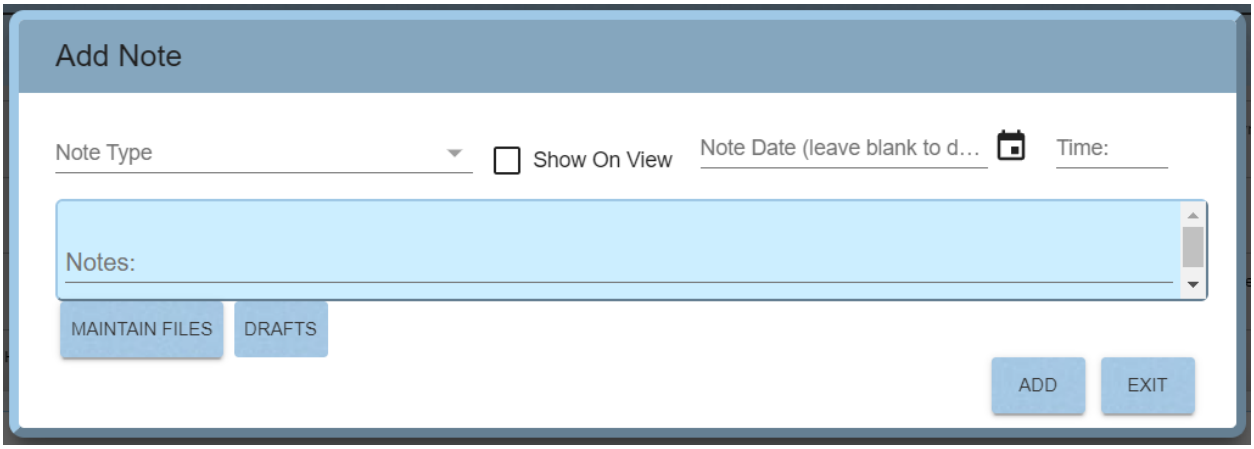


Medical Notes Tab

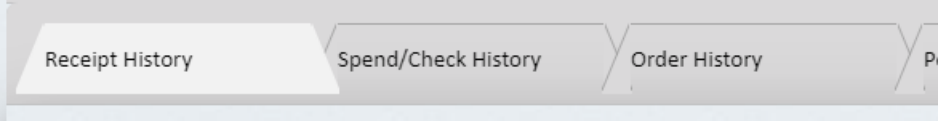


The **Medical Notes** tab is where medical staff can enter and view medical notes. Additional permissions can be given to non-medical staff that need access to these notes as well. (This is done when editing permissions for security profile: see the *Medical Permissions* section in the previous pages.) The View Story button will list all the notes on a single report.



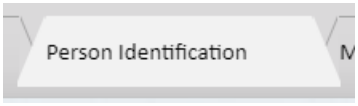


Commissary Tabs



These three tabs (**Receipt History, Spend/Check History, Order History)** will display information specific to the inmate's commissary history. The Receipt History tab will show receipts, the Spend/Check History tab will show spend/check history and the Order History tab will show order history. **These tabs are read-only tabs.** Information cannot be added in these tabs.

Person Identification Tab

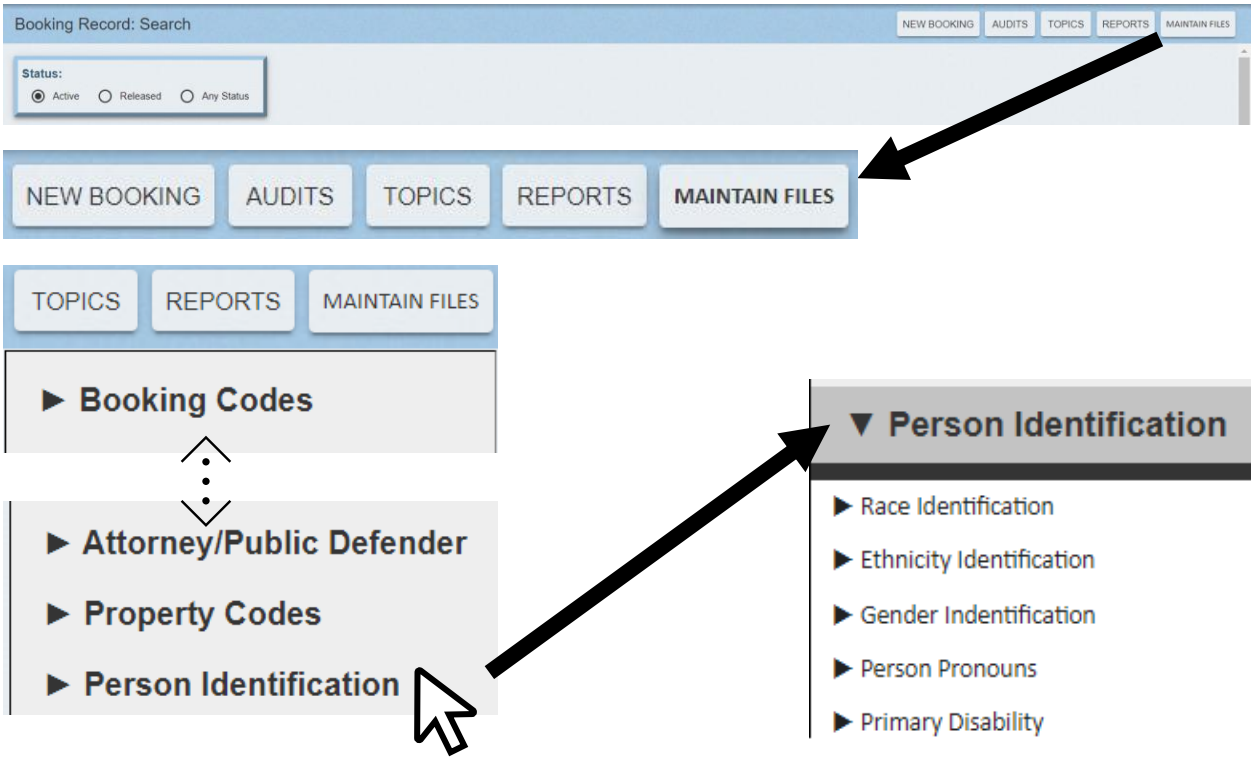


The **Person Identification** tab is to view or enter additional personal identification for the inmate such as race, gender, and ethnicity. The fields under this tab are drop-down only and cannot be free form. If additional options are desired, a Super User can add them in *Maintain Files*.

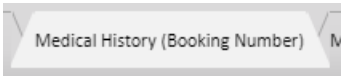


To add new options to the dropdown menu, click **Maintain Files** at the top right of the booking screen. Then navigate to *Person Identification* at the bottom and choose the appropriate option. Add the desired options and save.

Maintain Files → Person Identification → (Click Appropriate Option)

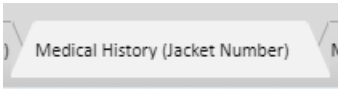


Medical History (Booking Number) Tab



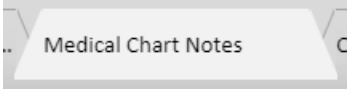
The **Medical History (Booking Number)** tab will display Medical History pertinent to this specific booking and is intended for **medical personnel** use only. **This tab is a read-only tab.**

Medical History (Jacket Number) Tab

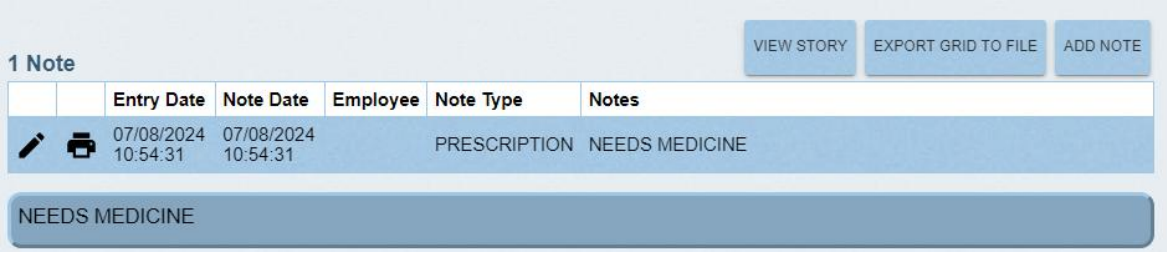


If the inmate has been booked into your facility before, the **Medical History (Jacket Number**) will display the bookings and the medical history for each booking. This tab is also intended for **medical personnel** only. **This tab is a read-only tab.**

Medical Chart Notes Tab

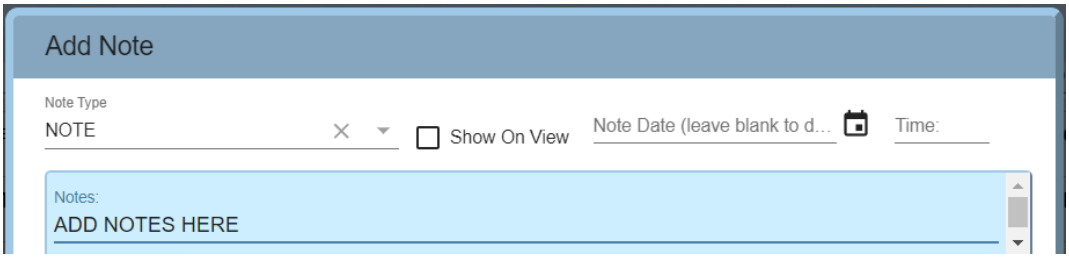


The **Medical Chart Notes** tab is where medical staff can add or view notes on the medical chart for the inmate. This is security protected and is only accessible to **medical personnel** or staff granted permissions – see the *Medical Permissions* section starting on page 180 for more information. Double click an entry on the table to view or edit it.

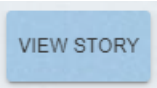


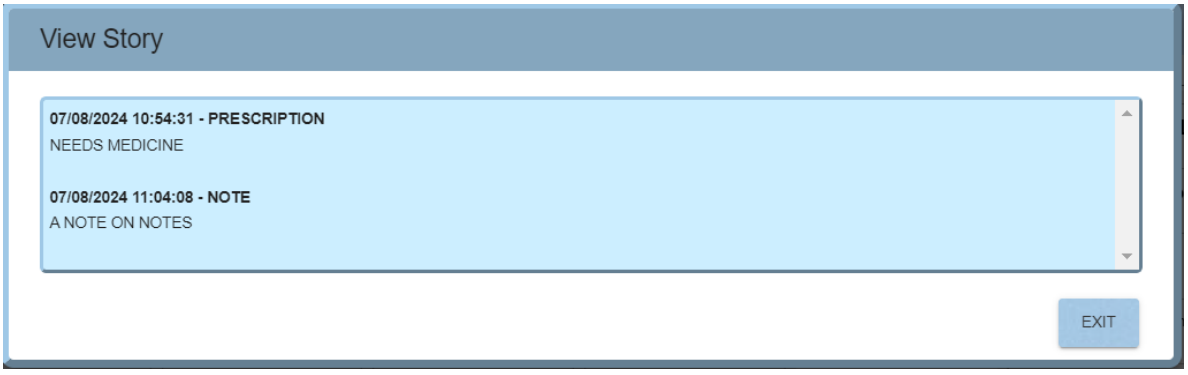
To add a new Note, simply click **Add Note:**





The **View Story** button will show all notes on one report.

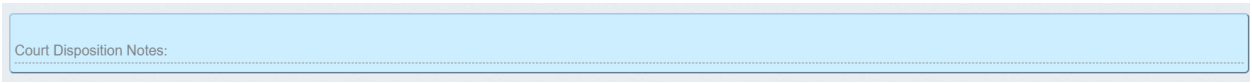




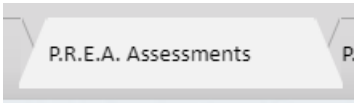
Court Disposition Tab



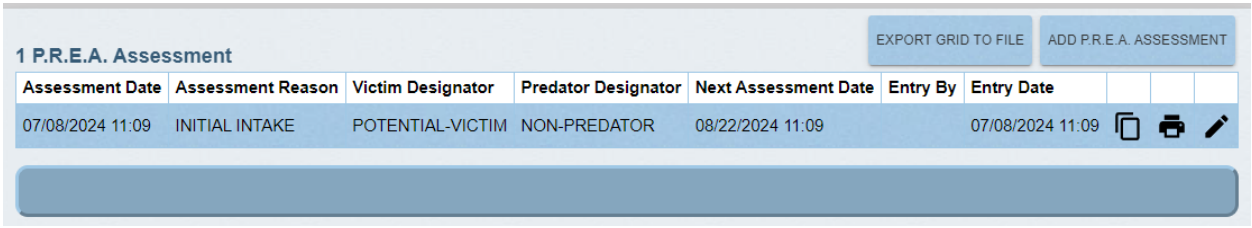
The **Court Disposition** tab is connected to any agency using the judges docket and will provide the court disposition here. **This tab is a read-only tab.**



P.R.E.A. Assessments Tab



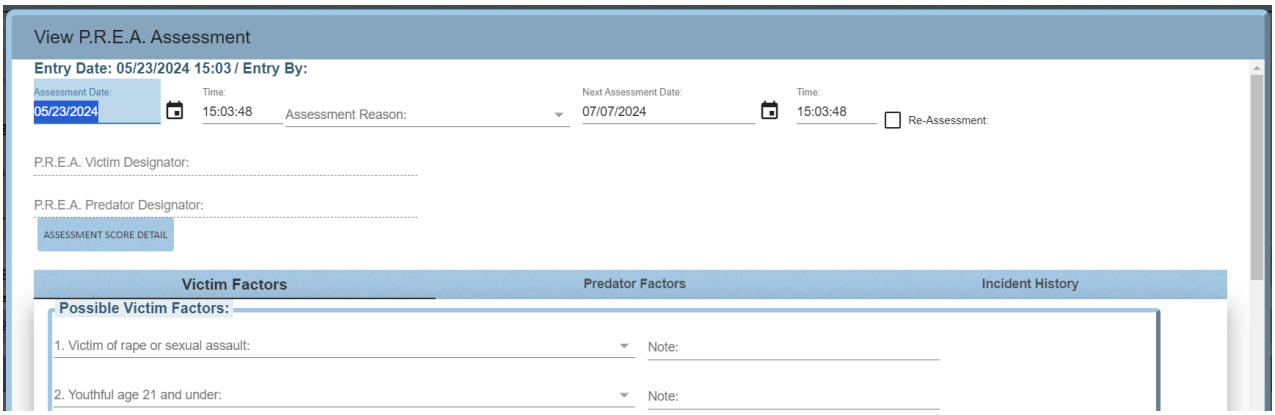
The **P.R.E.A. Assessments** tab is where you can enter P.R.E.A. assessment information.



Adding a New Assessment

When you click on **Add P.R.E.A. Assessment,** you will be asked if you are sure you want to add a P.R.E.A. assessment. Click **Yes**.





On the next pop-up screen, you can add in the information for the assessment. The **Assessment Date and Time** are added automatically but you can edit them if the assessment was done previously.

Fill in the **Assessment Reason** with *Initial Intake* if this is the initial assessment.

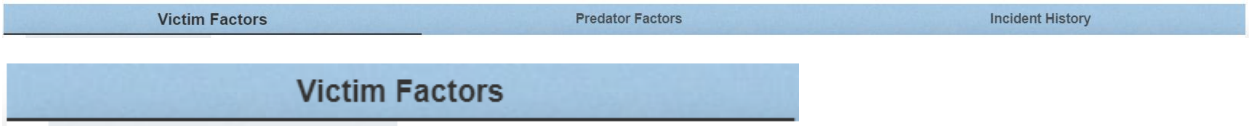


For a later assessment, choose *Reassessment* and be sure to also check the *Re-Assessment* box.

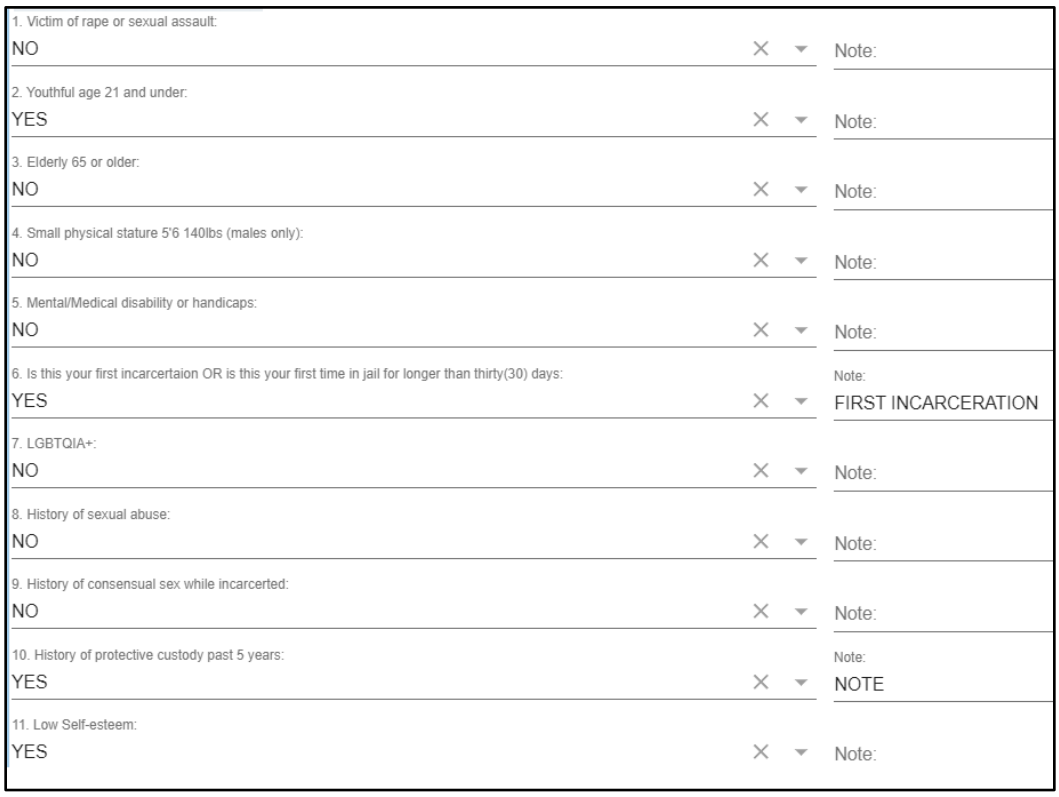


There are **Next Assessment Date & Time** fields if necessary to track when the next assessment should take place.

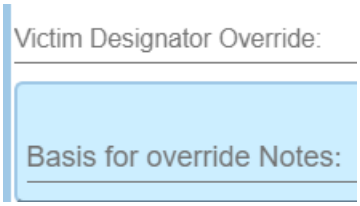
Each heading on the blue bar is a tab that can be clicked on to add additional information. Begin with *Victim Factors:*



These are factors for if the inmate is at risk for being an assault victim. Some questions require input from the inmate while others can be answered via observation. Add any appropriate notes in the *Note* field for each question and answer each question as *yes, no,* or *not answered.* There are also check boxes to mark if **Mental Health Referral** was **offered** and if it was **accepted.**

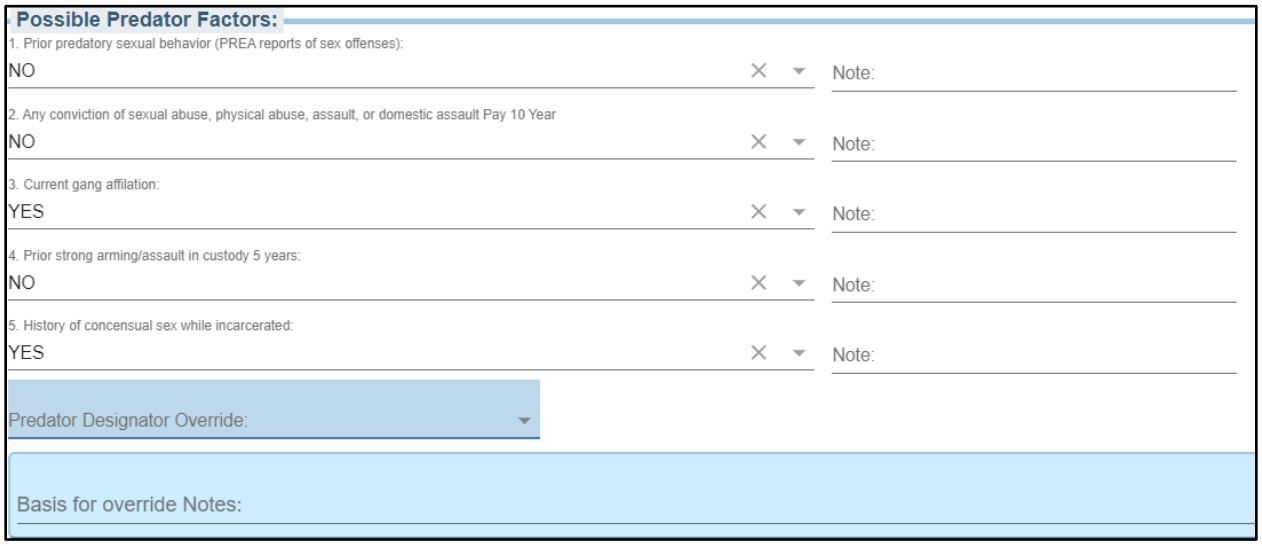


If the 1st question (*victim of rape or sexual assault*) is answered yes, iSOMS will mark the inmate as a *Known Victim*. If at least 3 of the other factors (2-11) qualify as *Yes*, then iSOMS will mark the inmate as a *Potential Victim*. You can override the suggested designator with the **Victim Designator Override** but be sure to add the reason in the notes field below it.



Predator Factors

Predator Factors lists factors for deciding if the inmate should be designated as a potential or known predator. Unlike the victim factors, you typically will not need to use the *not answered* option. Fill out the list of factors with *yes* or *no*.

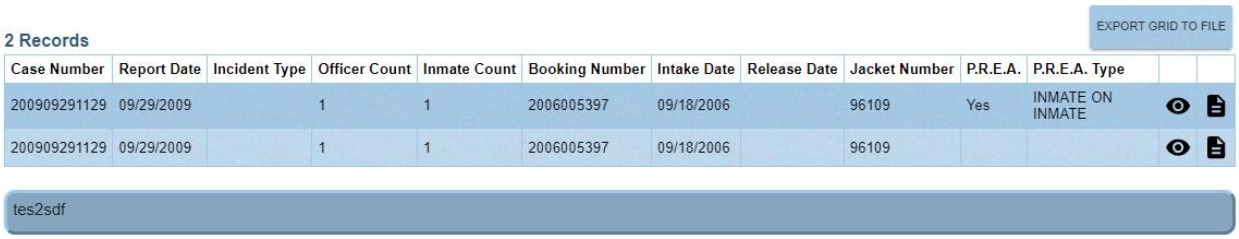


If the 1st question is answered *yes*, the inmate will be designated as a **Known Predator**. If at least two of the other factors (2-5) are answered *yes*, the inmate will be marked as a **Potential Predator**.

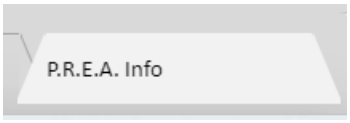
You can override the suggested designator with **Predator Designator Override** but be sure to add the reason in the notes field below it.

Incident History

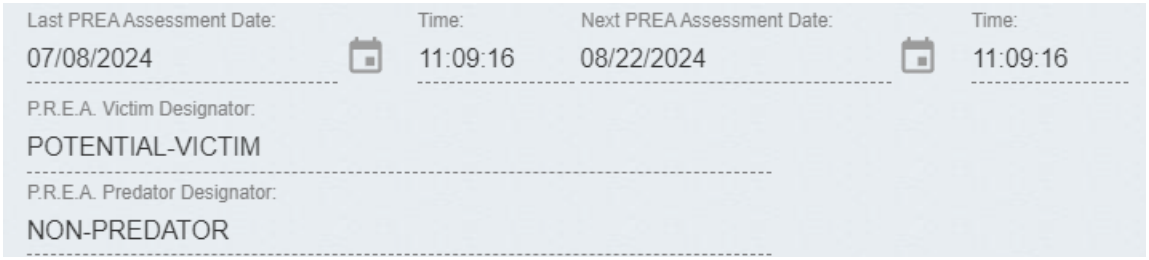
Incident History is a reference heading and allows you to quickly see any jail incidents involving this inmate quickly. **This heading is a read-only heading.**



P.R.E.A. Info Tab



The **P.R.E.A. Info** tab will display information specific to the inmate's P.R.E.A. assessment. **This tab is a read-only tab.**



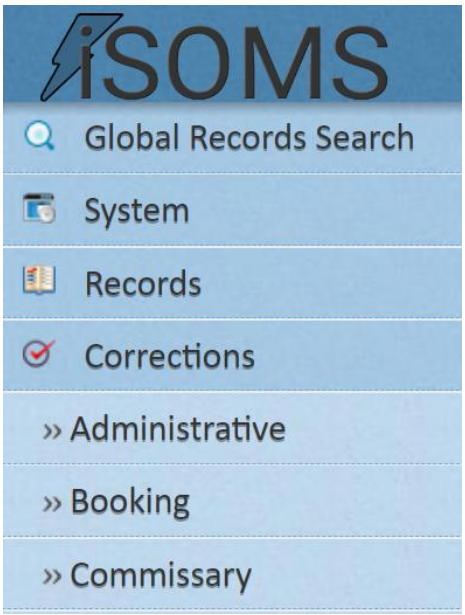
Jail Reporting

iSOMS has the capability to run several report options to see information on the jail population. These allow you to see shift reports, analysis reports, medical reports, and more.

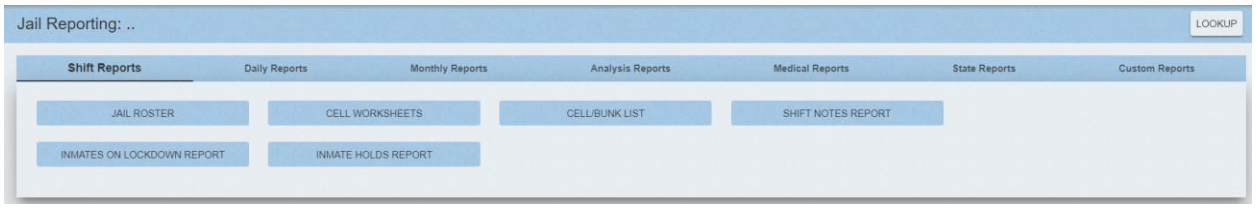
IMPORTANT: The entry for **Jail Roster** on page 196 walks through a general guide on how all reports work. Use this entry to learn the report system.

To navigate to Jail Reporting begin on the iSOMS home screen. Navigate to:

Corrections → Booking → Jail Reporting







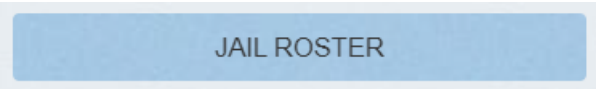
All the headings in the blue bar will take you to different report categories. Click on one and the reports available for that category will show in the grid below.



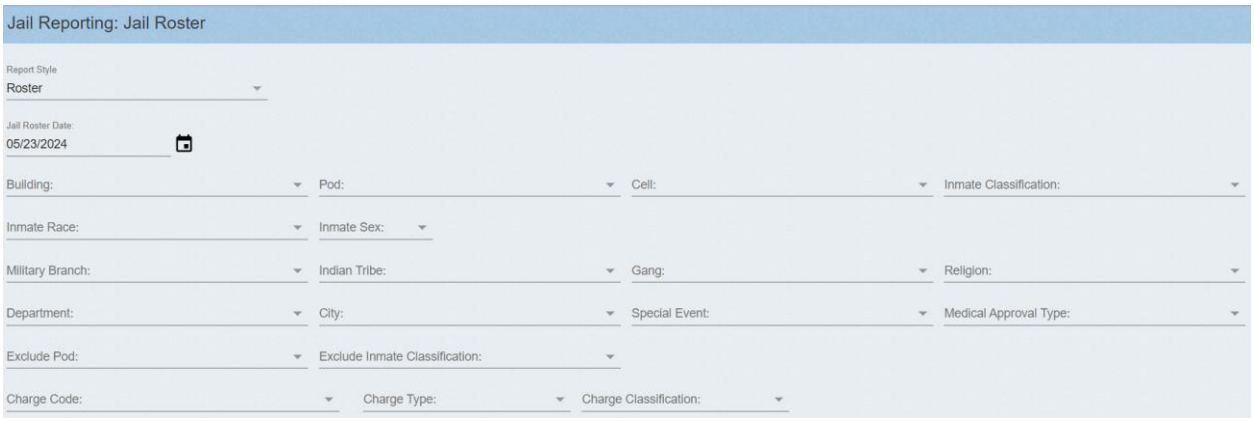
Shift Reports



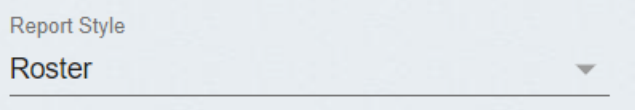
The first category of reports are the shift reports. These are reports you may need access to for each shift. Let's take a look at the different options.



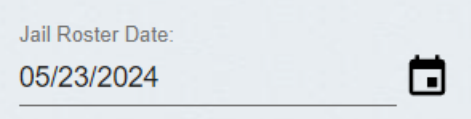
Jail Roster is a list of everyone in jail. Once you click on **Jail Roster,** a search screen will open to help you narrow your roster. We will use this as an example for all reports.



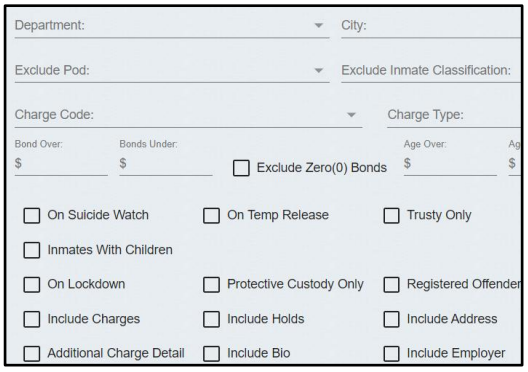
You can choose the Report Style which controls how the list prints. You can try different styles and use **View** to see what different styles do. This controls what data is listed and how it appears. Many reports have this option to change styles. Use it to get specific information on the different report pages, including this one.



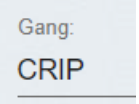
For the Jail Roster, you need to enter a date. Some reports have a start and end date, so take care to use both if necessary. By entering the date range, you limit the data displayed.

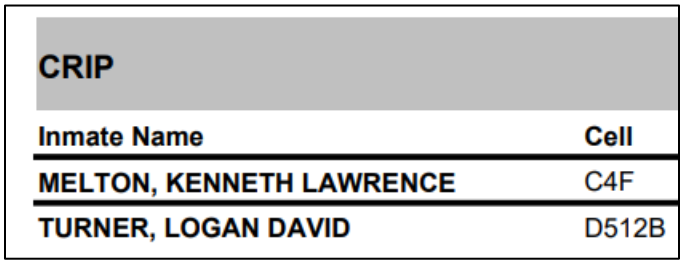


There are several options you can choose from drop-down lists or check boxes to narrow your search. The more information you enter, the fewer returns will show on your report. Use these to restrict what and who is listed on the reports to get the info you need.



For example, you can choose an option from the **Gang** dropdown to only show inmates with a particular gang affiliation. When you create the report, only these inmates will appear.



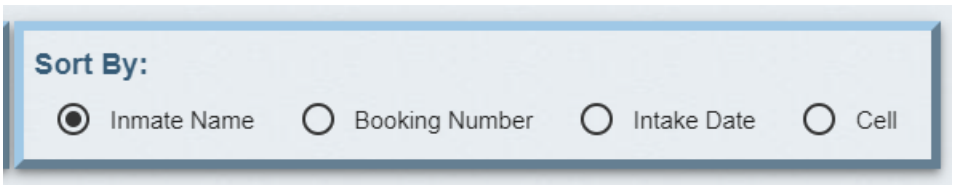


CRIP

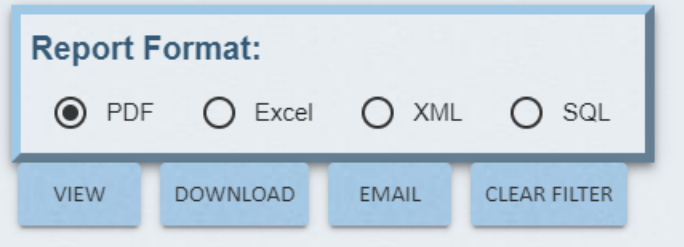
Inmate Name	Cell
MELTON, KENNETH LAWRENCE	C4F
TURNER, LOGAN DAVID	D512B

There are numerous options in the fields. Only inmates who match the criteria will appear in the report. Use this to search for what you need. This sort of filter searching applies to the rest of the reports, unless otherwise noted.

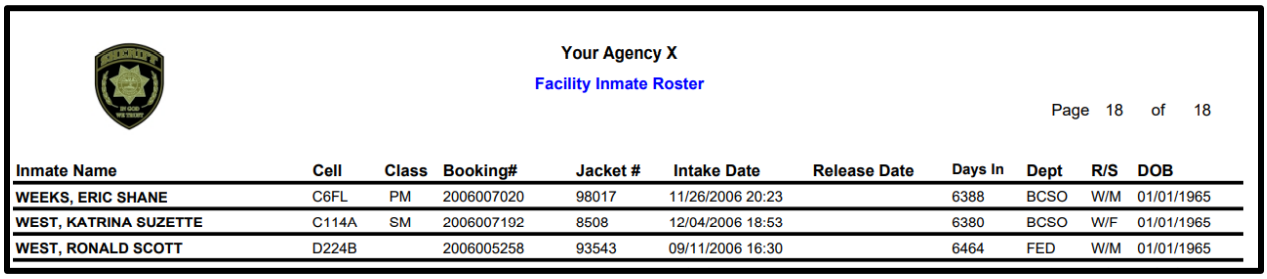
There is a box where you can choose how the information in your report will be sorted. You can click the circle for Inmate Name, Booking Number, Intake Date, or cell, depending on how you want the information sorted.



Once you have entered all the parameters for your search, scroll to the bottom. There you can choose the format for the report and click the appropriate button if you want to **view**, **download**, or **email** the report. Consider viewing the report before downloading or emailing to be sure the report shows the information you were expecting.



If you are just looking for the number of people in jail, leave the report in the default list style, enter today's date, and then click **View**. Scroll to the bottom of the report and you will see the number of people in jail.



Your Agency X

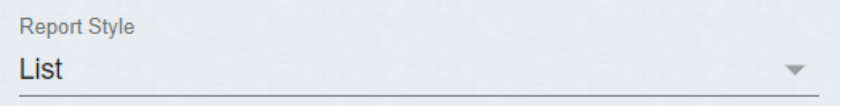
Facility Inmate Roster

Page 18 of 18

Inmate Name	Cell	Class	Booking#	Jacket #	Intake Date	Release Date	Days In	Dept	R/S	DOB
WEEKS, ERIC SHANE	C6FL	PM	2006007020	98017	11/26/2006 20:23		6388	BCSO	W/M	01/01/1965
WEST, KATRINA SUZETTE	C114A	SM	2006007192	8508	12/04/2006 18:53		6380	BCSO	W/F	01/01/1965
WEST, RONALD SCOTT	D224B		2006005258	93543	09/11/2006 16:30		6464	FED	W/M	01/01/1965



The **Inmates on Lockdown Report** will show all inmates on lockdown for specific dates. You can choose the report style, which will control how the report prints. One of the options allows you to put images of the inmates in the report, for example.



If the dates are left blank the report will show all inmates currently on lockdown. You can enter additional information to narrow your search. At the bottom of the page, choose the report format and if you want to view, download, or email the report.

Your Agency X

Inmate Lockdown List

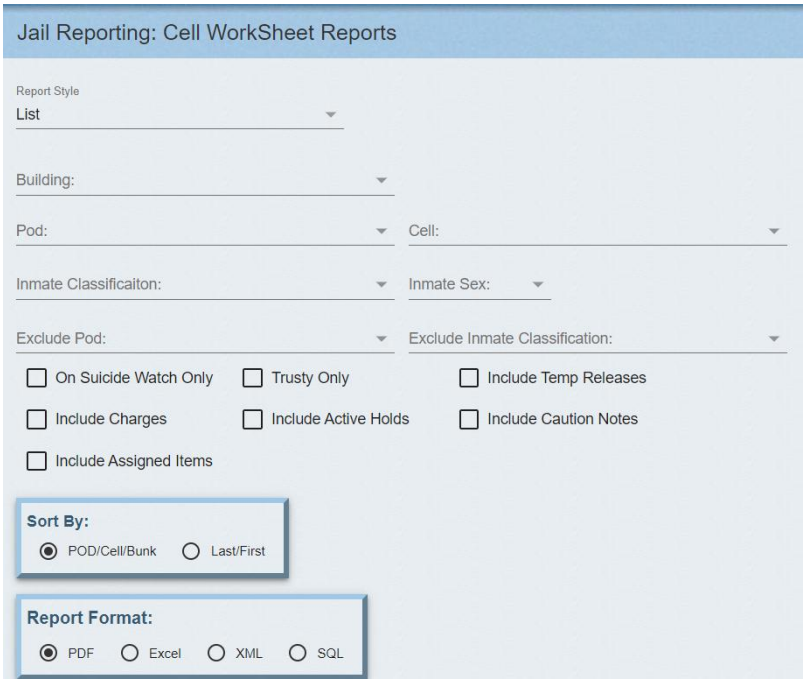
Inmate Name	Reason	Start Date/Time	Booking Num
SCALF, CHRISTOPHER EUGENE IV	RULE VIOLATION	06/21/2020 06:59	2006007198
Race: WHITE	**Sex:** MALE		
Restrict Commissary:	**Restrict Visitation:**		
Restrict Phone:	**Restrict Recreation:**		
Restrict Other:	**Estimated End Date:** 06/21/2020		
Did not come out of cell when commanded			
ELDER, SASHA DIANE	MEDICAL	06/21/2020 07:03	20120049
Race: WHITE	**Sex:** FEMALE		
Restrict Commissary:	**Restrict Visitation:**		
Restrict Phone:	**Restrict Recreation:**		
Restrict Other:	**Estimated End Date:** 06/21/2020		
flu like symptoms			
BAILEY, JESSE RONDALE	Not Specified	09/25/2020 15:22	2006006291
Race: BLACK OR AFRICAN AMERICAN	**Sex:** MALE		
Restrict Commissary:	**Restrict Visitation:**		
Restrict Phone: Yes	**Restrict Recreation:** Yes		
Restrict Other:	**Estimated End Date:**		

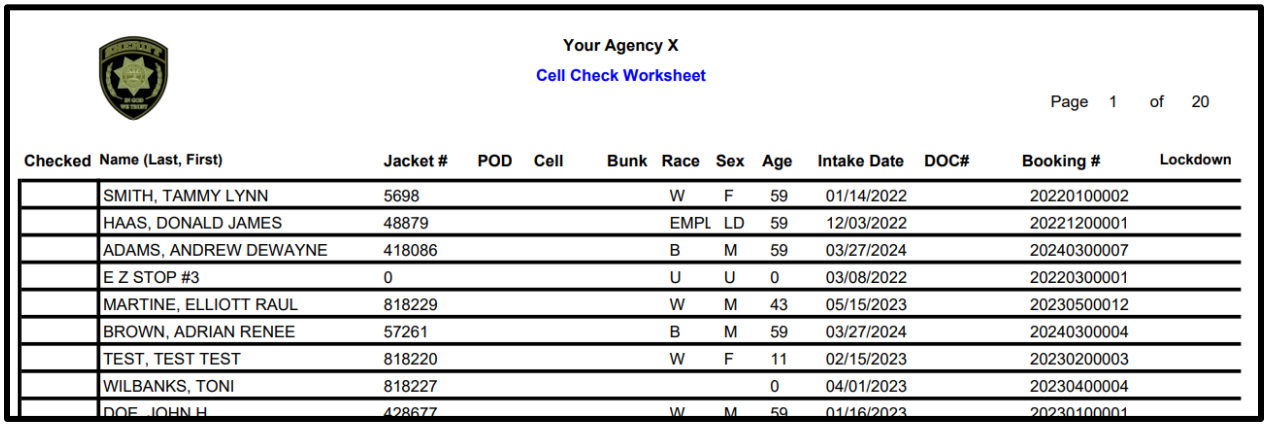
Count: **3**

CELL WORKSHEETS

The **Cell Worksheets** Report will show current pod, cell, and bunk information for inmates. This report is meant to be printed and filled out. There are checkboxes that will print on the report that can be checked as officers are checking on inmates.

As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.





Your Agency X

Cell Check Worksheet

Page 1 of 20

Checked	Name (Last, First)	Jacket #	POD	Cell	Bunk	Race	Sex	Age	Intake Date	DOC#	Booking #	Lockdown
	SMITH, TAMMY LYNN	5698				W	F	59	01/14/2022		20220100002	
	HAAS, DONALD JAMES	48879				EMPL	LD	59	12/03/2022		20221200001	
	ADAMS, ANDREW DEWAYNE	418086				B	M	59	03/27/2024		20240300007	
	E Z STOP #3	0				U	U	0	03/08/2022		20220300001	
	MARTINE, ELLIOTT RAUL	818229				W	M	43	05/15/2023		20230500012	
	BROWN, ADRIAN RENEE	57261				B	M	59	03/27/2024		20240300004	
	TEST, TEST TEST	818220				W	F	11	02/15/2023		20230200003	
	WILBANKS, TONI	818227						0	04/01/2023		20230400004	
	DOE, JOHN H	428677				W	M	59	01/16/2023		20230100001	

INMATE HOLDS REPORT

The **Inmate Holds Report** will show holds for inmates over a particular time frame. If the dates are left blank, the report will show current holds only.

As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

Your Agency X

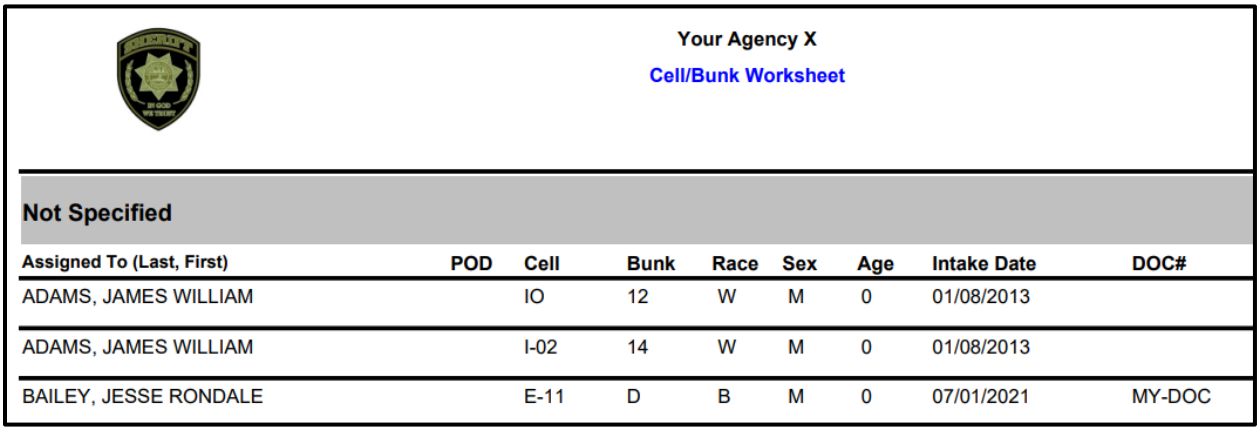
Inmate Holds

Hold Release Dates From 05/06/2000 Through 01/04/2024

Inmate Name	Cell	Booking Number	Hold Date/Time	Hold By
ADAMS, RONNIE TRACY JR	D414A	2006005397	12/02/2012 17:58	MARYVILLE POLICE DEPT
	Intake Date:	09/18/2006	**Entry:**	MWELDER
	Race:	BLACK OR AFRICAN AMERICAN	**DOC#:**	
	Hold Release Date/Time:	12/02/2012 17:58	**Sex:**	MALE
	Hold Released By:		**DOB:**	01/01/1965
	Hold for question			
APODACA, PHILLIP ARTHUR	D325A	2006004646	12/04/2012 17:59	MARYVILLE POLICE DEPT
	Intake Date:	08/14/2006	**Entry:**	MWELDER
	Race:	WHITE	**DOC#:**	
	Hold Release Date/Time:	12/04/2012 17:59	**Sex:**	MALE
	Hold Released By:		**DOB:**	01/01/1965
	Hold for question 72 hr			
ELDER, BRIAN, JR THOMAS	D	20120017	01/28/2014 09:45	MARYVILLE POLICE DEPT
	Intake Date:	07/30/2013	**Entry:**	MWELDER
	Race:		**DOC#:**	
	Hold Release Date/Time:	01/28/2014 09:45	**Sex:**	
	Hold Released By:		**DOB:**	01/01/1965

CELL/BUNK LIST

The **Cell/Bunk List** will show the current cell and bunk assignments of inmates, some of their bio information, and their intake date.



Your Agency X

Cell/Bunk Worksheet

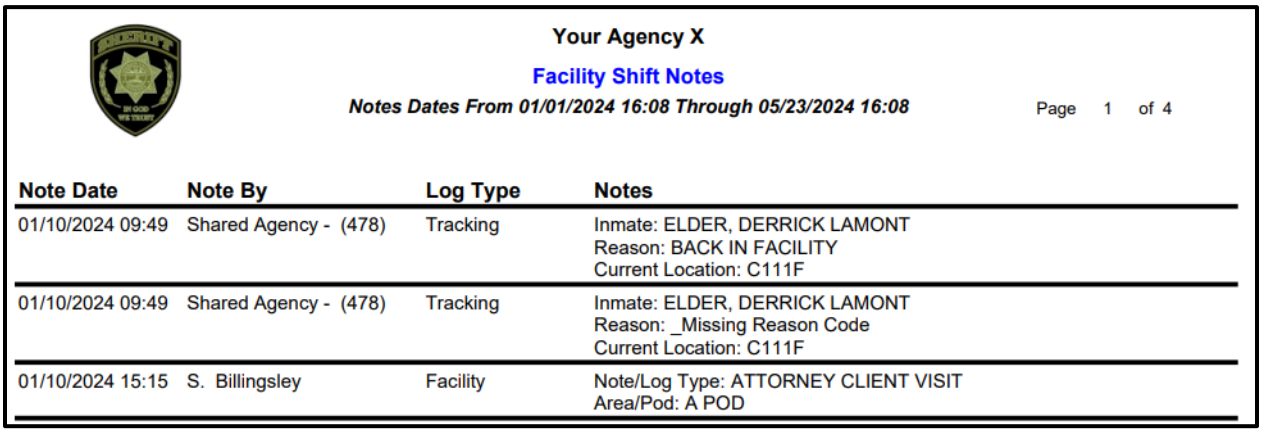
Not Specified

Assigned To (Last, First)	POD	Cell	Bunk	Race	Sex	Age	Intake Date	DOC#
ADAMS, JAMES WILLIAM		IO	12	W	M	0	01/08/2013	
ADAMS, JAMES WILLIAM		I-02	14	W	M	0	01/08/2013	
BAILEY, JESSE RONDALE		E-11	D	B	M	0	07/01/2021	MY-DOC

SHIFT NOTES REPORT

The **Shift Notes** report will show all shift notes over a specified time frame. Uncheck the check boxes to reduce shown information.

As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.



Your Agency X

Facility Shift Notes

Notes Dates From 01/01/2024 16:08 Through 05/23/2024 16:08

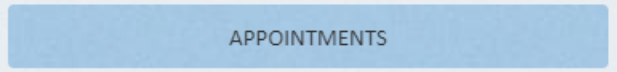
Page 1 of 4

Note Date	Note By	Log Type	Notes
01/10/2024 09:49	Shared Agency - (478)	Tracking	Inmate: ELDER, DERRICK LAMONT Reason: BACK IN FACILITY Current Location: C111F
01/10/2024 09:49	Shared Agency - (478)	Tracking	Inmate: ELDER, DERRICK LAMONT Reason: _Missing Reason Code Current Location: C111F
01/10/2024 15:15	S. Billingsley	Facility	Note/Log Type: ATTORNEY CLIENT VISIT Area/Pod: A POD

Daily Reports



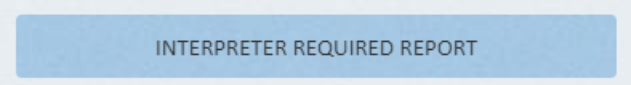
Daily Reports are reports you may need access to each day, such as events, assessments, or allergies. Let's look through these options.



The **Appointments Report** will list all the appointments each inmate has, the date and time of the appointment, and the reason for the appointment.

Inmate Name	Reason
SMITH, ADAM ROCKY	Not Specified

As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

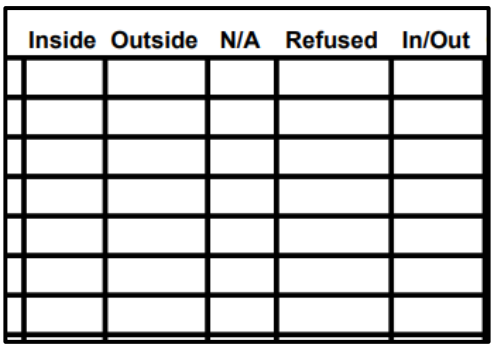


The **Interpreter Required Report** will show inmates who require an interpreter. Intake dates should be entered to reduce the search. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

Inmate Name	Language
ELDER, DERRICK LAMONT	SPANISH

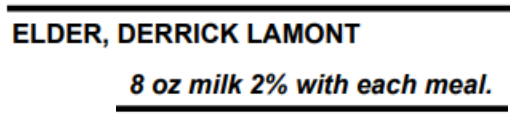
TIP: This report can also show released inmates if you need to find interpreter required information for inmates who have already been released.

LOG SHEETS



The **Log Sheets Report** will show different lists that allow officers to log information for inmates. These logs are designed to be printed and filled in. You can make logs for laundry needs, diet needs, recreational location performed, etc. The list style is where you will choose the different logs you would like to see. As with all iSOMS reports, you can choose style, narrow the search, and view, download, or email the report.

SPECIAL DIET LIST



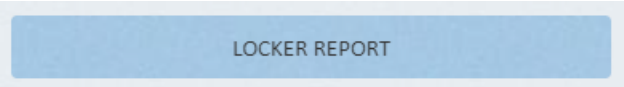
The **Special Diet List** report will list the special diet information for inmates that require a special diet. The report will show the inmate's name, special diet, and booking info. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report. Temp-release and notes can be included or excluded.

MEDICAL APPROVALS LIST

The **Medical Approvals List** will list the inmates and medical approvals they have. The list can include images. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

CHANGE OF STATUS

The **Change of Status** report will show any changes in an inmate's status for a particular date. Some changes include being on or off lockdown, being released, being on or off suicide watch, and more.



The **Locker Report** will show locker assignment information (or other storage system assignments) for inmates. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.



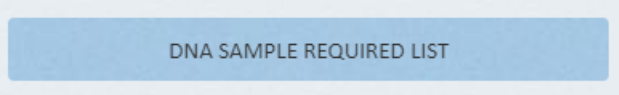
The **House Arrest List** will show a list of all people in your system on house arrest over a particular time frame. It includes the inmate's name, house arrest starting and ending dates, and house arrest tracking number. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.



The **Temporary Release List** will show all inmates on temporary release over a particular time frame. The report will show information such as the inmate's name, date of release, estimated date of return, date of return, and number of days out. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

COURT ORDERED FURLOUGH

Inmate Name	Booking #
BURNS, STEPHANIE CHARLENE	2006005366
MCKEE, CECELIA YVONNE	2006004818
PIERCE, JIMMY RILEY	2006003534



The **DNA Sample Required List** will show a list of bookings that require a DNA sample from the inmate over a particular time frame. The report will show the inmate's name, booking information, and DNA sample collection information. Checkboxes can be checked for information to include or exclude. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

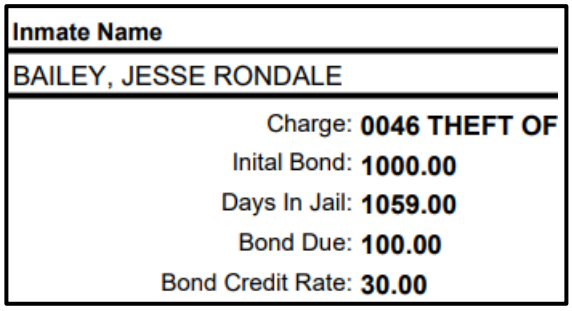
Inmate Name

JONES, ALFRED WILLIAM

Sample Required: YES
Collected On:
Mailed On:
Sample Returned:

BAIL CREDIT REPORT

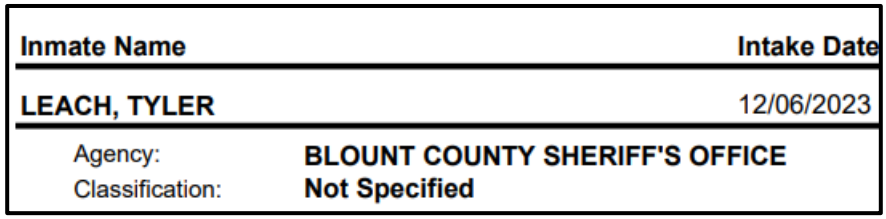
The **Bail Credit Report** will show the bail credit for each inmate on a particular date. It will show booking information, original bond due, the number of days in jail, the bond credit rate, and the total bond credit. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.



Inmate Name	
BAILEY, JESSE RONDALE	
Charge:	**0046 THEFT OF**
Inital Bond:	**1000.00**
Days In Jail:	**1059.00**
Bond Due:	**100.00**
Bond Credit Rate:	**30.00**

PRESS RELEASE

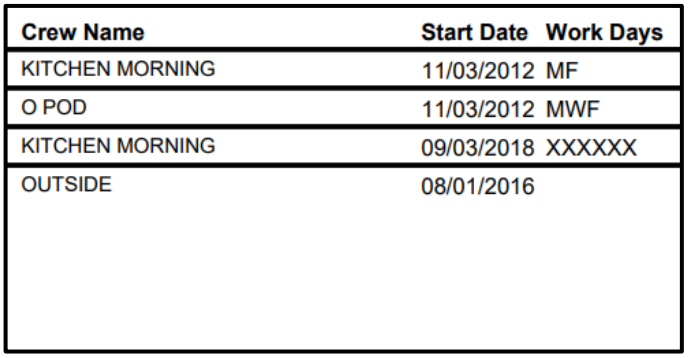
The **Press Release** will show intake and release information over a particular time frame and is intended to be given to press agencies. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.



Inmate Name	Intake Date
LEACH, TYLER	12/06/2023
Agency:	**BLOUNT COUNTY SHERIFF'S OFFICE**
Classification:	**Not Specified**

WORK CREW LIST

The **Work Crew List** will show all inmates on work release over a certain time frame. The report lists names, start and end dates for work release, and has signature fields for work supervisors and release officers. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.



Crew Name	Start Date	Work Days
KITCHEN MORNING	11/03/2012	MF
O POD	11/03/2012	MWF
KITCHEN MORNING	09/03/2018	XXXXXX
OUTSIDE	08/01/2016	

INMATE DAILY SCHEDULED EVENTS

The **Inmate Daily Scheduled Events** will show certain scheduled events such as court dates, scheduled releases, or appointments. It will show the inmate's name, booking information, event date, and time. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

Inmates With Court Dates

Court	Court Date	Last, First Name
CR	04/04/2024 00:00	DOE , JOHN MATT
GSII-1	05/15/2024 09:00	SMITH, ADAM ROCKY

Court: 2

Inmates With Scheduled Releases

Scheduled Date	Last, First Name

Scheduled Release: 0

ASSESSMENT /CLASSIFICATION REPORTS

The **Assessments/Classification Reports** will show any assessments and classifications of the inmates. You can choose to show classifications or assessments made already over a particular time frame, or it can show the upcoming assessments over a particular time frame. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

Last Assessment	Next Assessment	Assessment Reason	Current Level
10/17/2006	11/01/2006		MEDIUM
10/14/2006	10/29/2006		MEDIUM

RELEASE SCHEDULE LIST

The **Release Schedule List** will show scheduled releases. You should choose a particular time frame to see releases. The list can include images if required. Past releases can be included or excluded with a check box. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

Intake Date/Time	Cell	Estimated Release Date
09/09/2022 15:03	D214B	02/08/2023 14:00
08/01/2023 12:00		02/09/2023 00:00
09/11/2006 02:15	C4T	08/28/2023 07:31
10/20/2023 10:39		11/13/2023 10:03

ALLERGY LIST

The **Allergy List** report will show specific allergy information for inmates. Released inmates can be included in the list. This list can show foods, drugs, materials, gluten, and more. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

Diabetic	Peanut	Gluten	Drug	Food	Insect
	Yes	Yes	Yes	Yes	Yes

INMATE ACTIVITY ROSTER

The **Inmate Activity Roster** prints a checklist for activity status, location, and times for inmates. The list can be sorted by cell or by bunk. This list is intended to be printed so it can be written on keeping track of daily activity. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

INMATE NAME	IN	OUT	LOCATION
VAUGHN, JOSEPH ANTHONY			
WOELK, BRENT LAMONT			
HARRIS, AMANDA GAYLE			
JAMES, TERESA			

PREA ASSESSMENT REPORTS

The **P.R.E.A. Assessment Reports** will list inmates with the date of their last P.R.E.A. assessment and the date of their next P.R.E.A. Assessment. You must choose a particular time frame. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

Last Assessment	Next Assessment
04/10/2024 11:08	04/25/2024 11:08
04/11/2024 12:44	04/26/2024 12:44
04/12/2024 12:29	04/27/2024 12:29

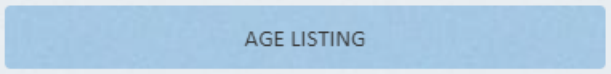
FINGERPRINT LIST

The **Fingerprint List** will show inmates who have been fingerprinted, intake and release dates, and who they were fingerprinted by.

Monthly Reports

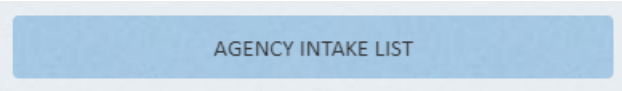


Monthly reports are reports you may need access to on a monthly basis, for records like bonds, grievances, incidents, mail logs, meal logs, and more. Let's take a detailed look at the options.



The **Age Listing** report will show inmate's age today. You must choose a particular date range for intake dates, and only inmates that have those intake dates will be listed. The report will list the inmate's intake date, name, social security number, birth date, and age on the date you are running the report. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

SSN	Date Of Birth	Age
	01/01/1965	59
	01/01/1965	59
123-45-6789	01/01/1965	59



The **Agency Intake List** will show all inmates booked in over a particular time frame. The list will show the inmate's name, booking number, department, intake date, prisoner number, charge information, and bond information. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

Department	Intake Date/Time
BLOUNT COUNTY SHERIFF'S OFFICE	05/20/2024 15:07
BLOUNT COUNTY SHERIFF'S OFFICE	05/20/2024 14:56

BONDSMAN REPORT (RELEASE TAB)

The **Bondsman Report** will show all inmates released on bond over a particular time frame. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

Intake Date/Time	Release Date/Time
01/01/2021 11:00	01/31/2021 08:16
Bond#: **750**	

BONDSMAN REPORT (CHARGES)

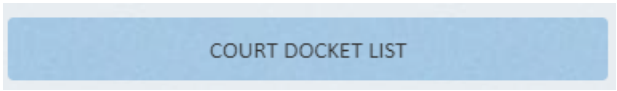
The **Bondman Report (Charges)** will show all inmates released on bond over a particular period with charge information. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

Inmate Name	Booking #
DALE, PAUL ANDREW	2005004710
Charge: **W-ATTACHMENT FOR CONTEMPT**	

BONDS POSTED REPORT

The **Bonds Posted Report** will show all bonds posted over a particular range of release dates. The report will show the inmate's name, intake, and release dates. It lists the bond and type of bond. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

Release Date	Bond Paid	Bond Type
02/10/2021 19:26	0.00	TRANS TO OTHER AGENC
01/31/2021 08:16	750.00	OWN RECOGNIZANCE



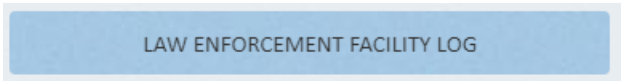
The **Court Docket List** will show court information for inmates over a particular time period. The report will show inmate and booking information listed alongside court, case, and bond information. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

Inmate Name	Booking Number
DOE , JOHN MATT	20240400001

AGGRAVATED BURGLARY

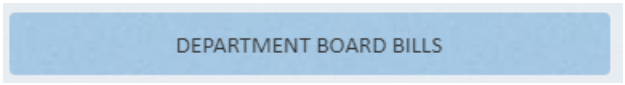
Court : **CRIMINAL COURT**

Case #: **24PE-CR00412**



The **Law Enforcement Facility Log** shows the facility inmate roster for a particular time period of intake dates. The roster includes a variety of information, including name, DOB, age at intake, sex, race, facility type, intake reason, intake & release date, offense, type, class, court, and county. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

Inmate Name	DOB	Age
ABBOTT, BOBBY LEE	01/01/1965	59



Department Board Bills 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. For more information, see *Board Billing* on page 246. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

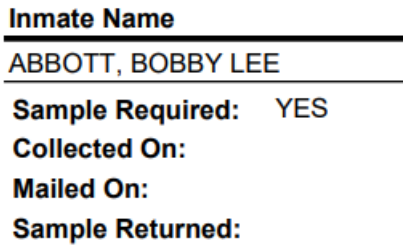
Rate	Billed From	Billed Thru
50.00	05/24/2024	05/24/2024

Dept Total: **50.00**

Total: **50.00**

DNA SAMPLE REQUIRED LIST

The **DNA Sample Required List** will show a list of bookings that require a DNA sample from the inmate over a particular intake time frame. The report will show the inmate's name, booking information, and DNA sample collection information. Checkboxes can be checked for information to include or exclude. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.



Inmate Name	
ABBOTT, BOBBY LEE	
Sample Required:	YES
Collected On:	
Mailed On:	
Sample Returned:	

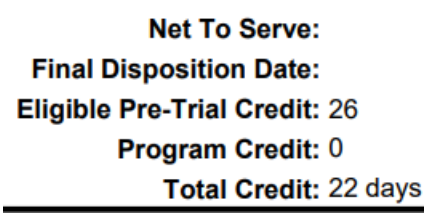
INCOMPATIBLES LIST

The **Incompatibles List** will show information on which inmates are incompatible and why. You should choose a particular date range. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

Incompatibles	Why Incompatible
ELDER, DERRICK LAMONT	**FIGHT**
SCALF, CHRISTOPHER EUGENE	FIGHT
BROADWAY, CHRISTOPHER L	FIGHT

FLATTENED SENTENCE REPORT

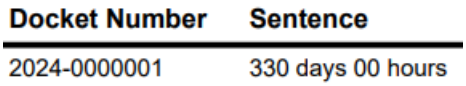
The **Flattened Sentence Report** will show all inmates with credits that will shorten their time in jail. The report will list inmate information, booking information, sentence information, and credit information. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.



Net To Serve:	
Final Disposition Date:	
Eligible Pre-Trial Credit:	26
Program Credit:	0
Total Credit:	22 days

INMATE COURT CHARGE DISPOSITION

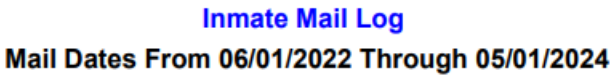
The **Inmate Court Charge Disposition** report will show information for charge dispositions for inmates over a particular time frame. The report will show the inmate's name, mittimus information, docket number, and sentence. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.



Docket Number	Sentence
2024-0000001	330 days 00 hours

INMATE MAIL LOG

The **Inmate Mail Log** will list all mail received for inmates over a particular time frame. The log will show the inmate's name, booking #, and master ID. You will be able to see both the mail type and receiving date. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

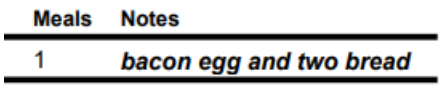


Inmate Mail Log

Mail Dates From 06/01/2022 Through 05/01/2024

DEPARTMENT MEAL LOGS

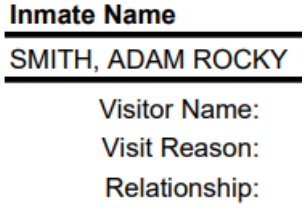
The **Department Meal Logs** will show meal information for inmates over a particular time frame. You can sort the report by department if you would like. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.



Meals	Notes
1	***bacon egg and two bread***

INMATE VISITATION REPORT

The **Inmate Visitation Report** will show inmate visitation logs over a particular time frame. The report will show inmate's name and booking information as well as date and visitor information. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.



Inmate Name

SMITH, ADAM ROCKY

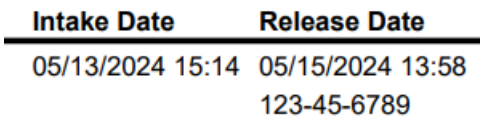
Visitor Name:

Visit Reason:

Relationship:

INTAKE/RELEASE REPORT

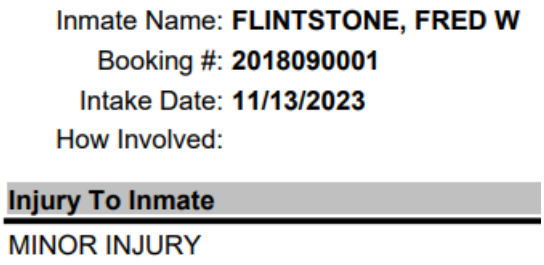
The **Intake/Release Report** will show intake and release information over a particular time period. There are several ways to group the information you see in the report. The report will show inmate information, booking information, and intake/release information. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.



Intake Date	Release Date
05/13/2024 15:14	05/15/2024 13:58
	123-45-6789

JAIL INCIDENTS REPORT

The **Jail Incidents Report** will show all incident reports that were made for incidents in the jail over a particular time frame. It will show the case number and basic information. There are several options for information to include or exclude. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

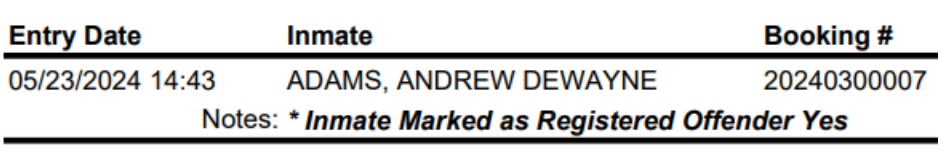


Inmate Name: **FLINTSTONE, FRED W**
Booking #: **2018090001**
Intake Date: **11/13/2023**
How Involved:

Injury To Inmate
MINOR INJURY

JAIL INMATE NOTES REPORT

The **Jail Inmates Notes Report** will show notes entered for all inmates over a particular time period. The report will include inmate information, booking information and notes. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.



Entry Date	Inmate	Booking #
05/23/2024 14:43	ADAMS, ANDREW DEWAYNE	20240300007
Notes:	***Inmate Marked as Registered Offender Yes**	

FOREIGN BORN LIST

The **Foreign Born List** will show a list of all inmates who are foreign born over particular intake dates. The report will show inmate's name, booking information, and place of birth. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

DOB	Fel/Mis	Place Of Birth
01/01/1965		MEXICO

GRIEVANCE REPORT

The **Grievance Report** will show grievances reported over a particular time frame. The report will show the inmate's name, booking number, grievance, and the date the grievance was reported. If the grievance has a disposition, the disposition and disposition date will also show. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

Disposition Date	Disposition
	DISMISSED NOT A VALID GRIEVANC

INMATE EDUCATION REPORT

The **Inmate Education Report** shows current education information for inmates. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

RICHARDS, ANTHONY ORVILLE

Intake Date:

Level Of Education:

Enrolled Prior To Arrest:

SOCIAL SECURITY EXPORT/REPORT

The **Social Security Export/Report** will show inmate Social Security information. You should choose a set of particular intake dates. It will list the inmate's name, intake date, release date, booking number, sentence start and end dates, social security number, race, and sex. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

DOB	SSN
01011965	123-45-6789

BOOKING WARRANT/CIVIL LIST REPORT

The **Booking Warrant/Civil List Report** will show a list of possible active warrants or civil actions for each inmate. The report will show the inmate's name, intake date, jacket number and the possible warrant or civil action. This report can be filtered to show just one inmate. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

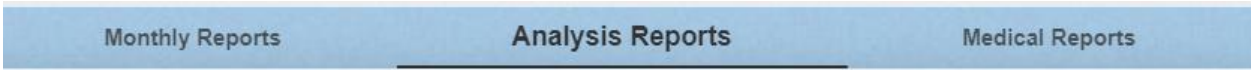
Program
/WARRANTS /CIVIL

PROGRAM/BEHAVIOR CREDIT LIST REPORT

The **Program/Behavior Credit List Report** will show program or behavior credits for each inmate over a particular time frame of intake dates. The report will show some booking information as well as the credit information. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

Credit Days	Credit Hours	Credit Type
69	0	PROGRAM
9.5	0	BEHAVE
1	0	PROGRAM

Analysis Reports

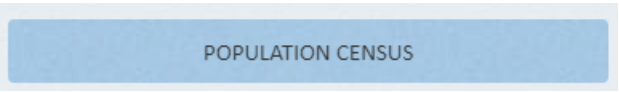


These analysis reports are reports you may need to analyze information for your current or past jail population. These reports include population stats, days in jail, religion, education, and more.



The **Population Stats Report** will show statistical information on your population. Style options include intake reason, occupation, classification, gang affiliation and more. The checkboxes restrict the report to certain criteria, such as only indigent, trusty, or lockdown inmates. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

Description	W
Not Specified	126
CONVICTED MISD	0
PRETRIAL FELON	43
PRETRIAL MISDEMEANANT	35
SENTENCED < 1 YEAR	12
SENTENCED > 1 YEAR	42
TENN DEPT OF CORRECTIONS	30

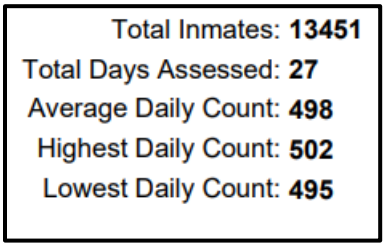


The **Population Census** will show current housing census information. The report lists pods, the capacity of each pod, number of inmates currently housed, and the space available. It will also show sex information for current inmate population. There are a few checkboxes that can be used to include or exclude information, such as temporary release, holding agencies, etc. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

Pod	Description
Not Specified	Not Specified
Not Specified	Not Specified
A	ALPHA POD
B	BOOKING
C	C POD
D	D POD
D6	D6
MEDIC	MEDIC

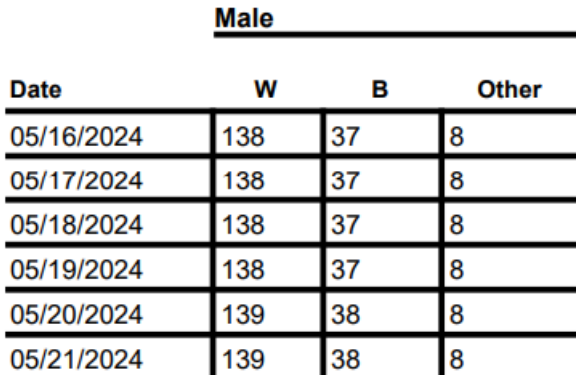
AVERAGE POPULATION

The **Average Population** report will show average population information over a given time frame by race, sex, and age. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.



AVERAGE DEPARTMENT POPULATION STATS

The **Average Department Population Stats** will show statistical information on your inmate population over a given time frame and will be grouped by department. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

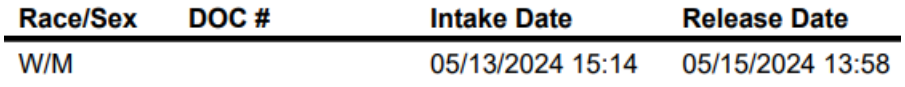


Male

Date	W	B	Other
05/16/2024	138	37	8
05/17/2024	138	37	8
05/18/2024	138	37	8
05/19/2024	138	37	8
05/20/2024	139	38	8
05/21/2024	139	38	8

RELEASE REASON SUMMARY

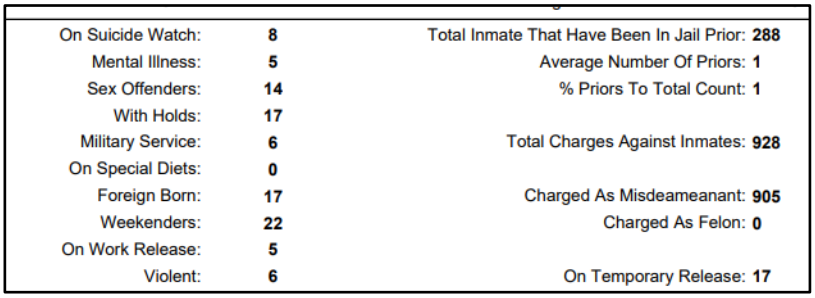
The **Release Reason Summary** report will show a summary of all releases over a specified date range. The report will include info such as basic demographics, release date, and reason code. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.



Race/Sex	DOC #	Intake Date	Release Date
W/M		05/13/2024 15:14	05/15/2024 13:58

INMATE POPULATION SUMMARY (SINGLE PAGE)

The **Inmate Population Summary (Single Page)** will show an analysis of the inmate population over a particular time frame on a single page of paper. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.



On Suicide Watch:	8	Total Inmate That Have Been In Jail Prior:	288
Mental Illness:	5	Average Number Of Priors:	1
Sex Offenders:	14	% Priors To Total Count:	1
With Holds:	17		
Military Service:	6	Total Charges Against Inmates:	928
On Special Diets:	0		
Foreign Born:	17	Charged As Misdeameanant:	905
Weekenders:	22	Charged As Felon:	0
On Work Release:	5		
Violent:	6	On Temporary Release:	17

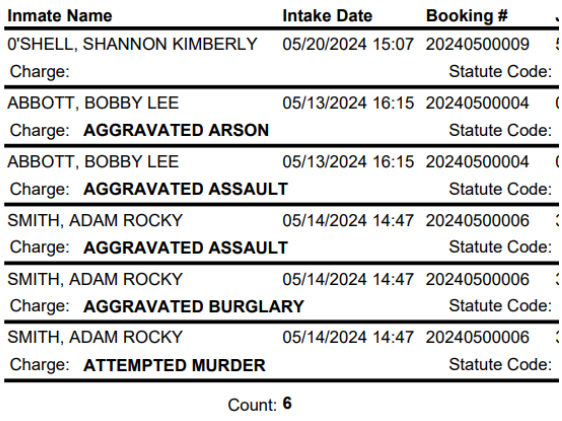
INTAKE/RELEASE AGE LIST

The **Intake/Release Age List** will show information for inmates over a particular date range for intakes and releases. The report will show names, booking number, date of birth, age, social security number, arrest date, release date, and days in jail. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

DOB	Age	SSN	Arrest Date	Release Date
01/01/1965	59			
01/01/1965	59			
01/01/1965	59	123-45-6789		
01/01/1965	59	123-45-6789		
01/01/1965	59			
01/01/1965	59	123-45-6789		

NEW INMATE CHARGE LOG SHEET

The **New Inmate Charge Log Sheet** will show new charges for inmates over a given time frame. The report will list the inmate's name, booking info, social security number, and charge information. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.



Inmate Name	Intake Date	Booking #	
0'SHELL, SHANNON KIMBERLY	05/20/2024 15:07	20240500009	5
Charge:		Statute Code:	
ABBOTT, BOBBY LEE	05/13/2024 16:15	20240500004	(
Charge: **AGGRAVATED ARSON**		Statute Code:	
ABBOTT, BOBBY LEE	05/13/2024 16:15	20240500004	(
Charge: **AGGRAVATED ASSAULT**		Statute Code:	
SMITH, ADAM ROCKY	05/14/2024 14:47	20240500006	3
Charge: **AGGRAVATED ASSAULT**		Statute Code:	
SMITH, ADAM ROCKY	05/14/2024 14:47	20240500006	3
Charge: **AGGRAVATED BURGLARY**		Statute Code:	
SMITH, ADAM ROCKY	05/14/2024 14:47	20240500006	3
Charge: **ATTEMPTED MURDER**		Statute Code:	

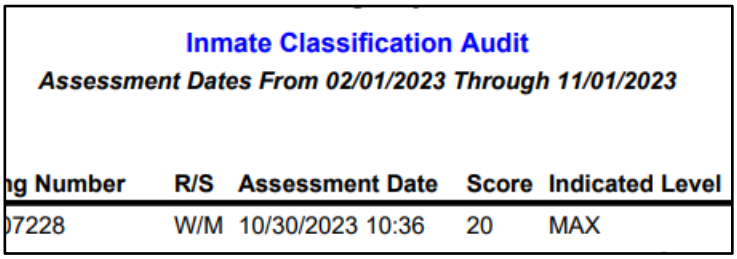
Count: **6**

EMPLOYEE INTAKE/RELEASE STATS

The **Employee Intake/Release Stats** will show statistical data for your agency's employees on intake and release over a given time frame. The report will list the employee's name, number of bookings, number of searches, and number of releases. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

INMATE CLASSIFICATION AUDIT

The **Inmate Classification Audit** will show inmate classifications over a specified time frame. It will show inmate's name, booking number, race, sex, last assessment, score, and next assessment. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.



Inmate Classification Audit

Assessment Dates From 02/01/2023 Through 11/01/2023

ng Number	R/S	Assessment Date	Score	Indicated Level
07228	W/M	10/30/2023 10:36	20	MAX

GANG ANALYSIS

The **Gang Analysis** report will show gang affiliation for intakes over a specified date range. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

Estimated Release	Cell	DOC	DOB	Gang
05/04/2017	C111F	MY-DOC	01/01/1965	ABC
	D614A		01/01/1965	ARYAN BROTHERHOO
	D417B		01/01/1965	ARYAN NATION
	D524B		01/01/1965	ARYAN NATION
	B10		01/01/1965	AYRE
12/13/2006	C5FL	PR156	01/01/1965	BIKERS
	WH47		01/01/1965	BLOODS
08/15/2016	C4F		01/01/1965	CRIP
	D512B		01/01/1965	CRIP

DAYS IN JAIL ANALYSIS BY DEPT

The **Days in Jail Analysis by Dept**. report is grouped by department origin. This report shows the number of inmates in your facility, the number of felons and misdemeanors, the total number of days in jail, and the average number of days in jail. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

Felon	Misdemeanor	Total Days
0	22	7
ıt: **1**		

Felon	Misdemeanor	Total Days
0	1	0
ıt: **1**		

INTAKE HOURLY ANALYSIS

The **Intake Hourly Analysis** will show hours in jail for inmates over a given time frame of intake dates. It will list the inmate's name, booking number, intake date, release date, and the total hours in jail. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

Intake Date	Release Date	Hours In Jail
05/13/2024 13:04		334
05/13/2024 15:14	05/15/2024 13:58	46
05/13/2024 16:15		331
05/13/2024 17:08		330
05/14/2024 14:47		308
05/20/2024 14:19		165
05/20/2024 14:56		164
05/20/2024 15:07		164

BOOKING AUDIT

The **Booking Audit** will show all bookings over a particular time period for each booking officer. It will list the officer, then each inmate's name, race, sex, date of birth, jacket number and booking number. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

	Race/Sex	Date Of Birth	Jacket Number
	W/M	01/01/1965	46108
	W/M	01/01/1965	3825
	W/M	01/01/1965	57492
SubCount: **3**			

	Race/Sex	Date Of Birth	Jacket Number
	W/M	01/01/1965	0
	W/M	01/01/1965	3825
SubCount: **2**			

	Race/Sex	Date Of Birth	Jacket Number
	B/M	01/01/1965	62625
	W/M	01/01/1965	27837
	W/F	01/01/1965	58465
SubCount: **3**			

ARRESSTING AGENCY LIST

The **Arresting Agency List** will show information over a given period of intake dates. You can see the agency name, the number of inmates arrested by them over the time period, and the percentage of your arrests that were made by that agency over the time period. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

Arresting Agency List

Intake Dates From 04/01/2023 Through 04/30/2023

Arresting Agency (Free Form)	Count
APD	4
MPD	1
BLOUNT COUNTY SHERIFFS OFFICE	2

INMATE EDUCATION LEVEL STATS

The **Inmate Education Level Stats** will show statistical information on inmate education levels over a range of intake dates. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

12 TH GRADE	1
6 TH GRADE	1
BACHELOR OF SCIENCE	0
DIPLOMA	2
SOME COLLEGE	0
TWO YEAR COLLEGE	4

INMATE IMAGE LISTS

The **Inmate Image List** shows inmates from a chosen intake date range with a label or scanner code. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

0'SHELL, SHANNON KIMBERLY

Bk#: **20240500009** Jacket #: **58465**

Dob: **01/01/1965** Race: **W** Sex:



RELIGIOUS PREFERENCE LIST

The **Religious Preference List** will list inmates with their religious beliefs/preferences. If you would like, you can choose a particular religion to display in the search criteria. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

ISLAM

Inmate Name	Booking Number
JONES, TERRY DENNIS	2006000959
MCCLAIN, CHRISTOPHER DEWAYNE	2005006115

Religion Count: **2**

JEW

Inmate Name	Booking Number
ESSERMAN, DAVID PAUL	2006006547

Religion Count: **1**

LUTH

Inmate Name	Booking Number
MCCAFFREY, PAMELA SUE	2006005904

Religion Count: **1**

INMATE DAYS IN JAIL LIST REPORT

The **Inmate Days in Jail List Report** will show the total number of days in jail for each inmate. When creating this report, you should choose a range of intake dates. The report will show name, booking info, jacket #, personal info, intake/release dates, and total number of days in jail. As with all iSOMS reports, you can choose the report style, enter info to narrow the search, and choose to view, download, or email the report.

Race	Sex	DOB	Intake	Release	Days
W	M	01/01/1965	05/13/2024	05/15/2024	2

CHARGE ANALYSIS(LIST/STATS)

Charge Analysis (List/Stats) allows you to get information on charge analysis over a given time period. You can choose a variety of ways to sort this information in the style field. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

Charge
AGGRAVATED CHILD ENDANGERMENT
AGGRAVATED KIDNAPPING
AGGRAVATED ROBBERY
AGGRAVATED ROBBERY
AGGRAVATED ROBBERY
AGGRAVATED ROBBERY

LENGTH OF SENTENCE REPORT

The **Length of Sentence Report** will show all inmates over a specific range of intake dates, and the length of their sentence. It will also show intake date, booking number, and date the sentence begins. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

Intake Date	Sentence Begins	Current Class	Sentence
05/14/2024 14:47	05/14/2024 14:47		1826 Days

BOOKING HISTORY RECIDIVISM

The **Booking History Recidivism** report will show recidivism *history* information over a specific time frame of intake dates. The report can include names when searching by specific criteria. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

Jacket Number	Intake Date	Release Date
122800	10/11/2013	10/11/2013
122800	03/07/2014	03/07/2014
122800	06/17/2020	06/23/2020

BOOKING RECIDIVISM RATES

The **Booking Recidivism Rate** report will show recidivism *rates* for inmates over specific intake dates. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

Total Inmates	Total Re-Offended	Percentage
168	16	9.52%

INMATE LOCKDOWN STATS

Inmate Lockdown Stats will show statistical information of inmates currently on lockdown by race, sex, code, and description. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

Code	Description
Not Specified	Not Specified
MEDICAL	MEDICAL
RULE VIOLATION	RULE VIOLATION



The **Inmate Holds Placed by Stats** will show statistical information on holds placed by department over a specified time frame. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

Description
Not Specified
ALCOA POLICE DEPARTMENT
DICKSON COUNTY
KNOXVILLE POLICE DEPT
MARSHALL SERVICE
MARYVILLE POLICE DEPT
SECRET SERVICE
US MARSHAL SERVICE



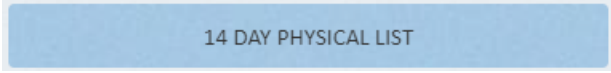
The **Temporary Release Stats** report will show statistical data for temporary releases sorted by their reason for release. This report is based on a range of release dates. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

Description
Not Specified
PRETRIAL MISDEMEANANT
SENTENCED > 1 YEAR
TENN DEPT OF CORRECTIONS

Medical Reports

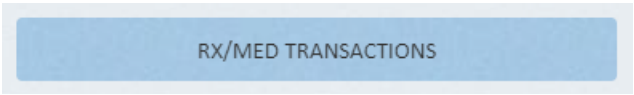


These are reports you may need for medical reasons, such as a list of prescriptions or an inmate's medical transactions. These reports are available to medical personnel.



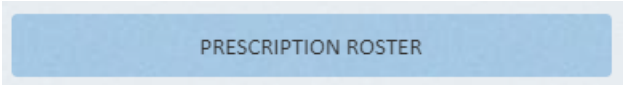
The **14 Day Physical List** will show info on inmates who have been in jail 14 days or more. There is a checkbox that can be checked to show info for inmates with exactly 14 days. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

SSN	DOB	Days In	Felon
XXX-XX-6789	01/01/1965	54	No
XXX-XX-6789	01/01/1965	55	No
XXX-XX-6789	01/01/1965	61	No
XXX-XX-1234	01/01/1965	62	No



The **RX/Med Transactions** report will show a list of prescription transactions over a specified time frame. The report will show name, booking number, prescription, date of transaction, and the employee who entered it. As with all iSOMS reports, you can choose the report style, enter information to narrow the search, and choose to view, download, or email the report.

Rx/Med	Qty	Refill
AMITRIPTYLINE	0	
	0	Yes



The **Prescription Roster** will show inmates with prescription medicines for a particular date. This report should be printed to fill out checkboxes if the inmate takes the medicine or refuses to take the medicine.

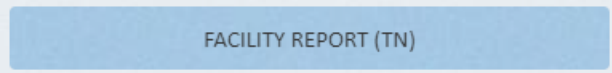
Prescription / Directions	Time	Signatures
AMITRIPTYLINE	08:00	
TAKE WITH WATER 8 0Z		Taken: ☐ Refused: ☐
DRUG 1	05:00	
WITH WATER		Taken: ☐ Refused: ☐

State Reports



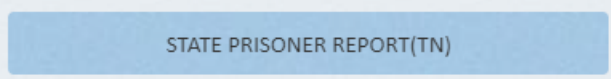
These are reports you may need to run for your state, depending on local laws. See below for the different options.

Tennessee



The **Facility Report** will show inmate information for your facility (formatted for Tennessee law) over a specified date range. As with all iSOMS reports, you can choose the report style, enter info to narrow the search, and choose to view, download, or email the report. (See the *Facility Reports and Classifications* on page 264 for more information.)

Date	DOC	Less Than 1 Year	1 Year and Over	Parole Local	Parole State	Convicted Mis	PreTrial Misd	PreTrial Felon	Other	Total
05/27/2024	36	19	54	0	0	2	4	3	12	130
Report Count:	**36**	**19**	**54**	**0**	**0**	**2**	**4**	**3**	**12**	**130**



The **State Prisoner Report** shows information specific to state prisoners (formatted for Tennessee law) over a specified date range. As with all iSOMS reports, you can choose the report style, enter info to narrow the search, and choose to view, download, or email the report.

Class	Plea Date	Confined From	Confied To
SM	12/04/06	05/01/24	05/27/24
CONTEMPT OF COURT (NOT ATTACH)			
SF	09/13/06	05/01/24	05/27/24
W-ATTACHMENT FOR CONTEMPT Sentence: / County Days: 364			

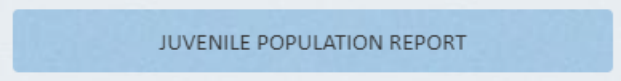
Illinois



The **Population Report** will show inmate population with sentence info and statistical info as required by IL law. As with all iSOMS reports, you can choose the report style, enter info to narrow the search, and choose to view, download, or email the report.



General



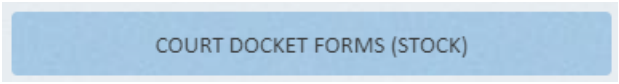
The **Juvenile Population Report** will show information on your juvenile population over a specified date range. This is formatted for Tennessee law. As with all iSOMS reports, you can choose the report style, enter info to narrow the search, and choose to view, download, or email the report.



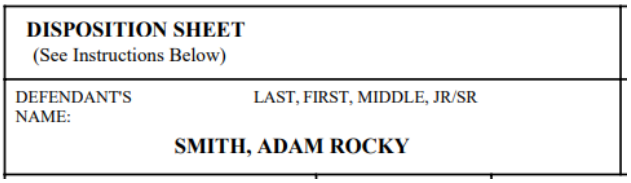
Custom Reports

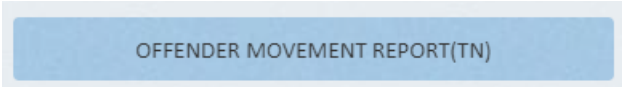


This is where you can use reports that are specific to your agency which relate to jail reporting.

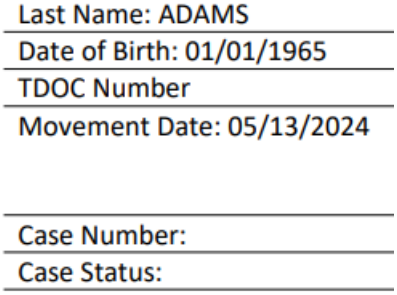


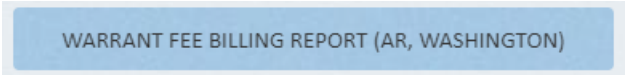
The **Court Docket Forms** are for different docket forms, such as Notice of Bond, Affidavits, and Dispositions. As with all iSOMS reports, you can choose the report style, enter info to narrow the search, and choose to view, download, or email the report.



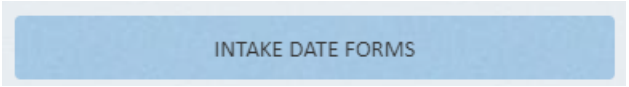


The **Offender Movement Report** will show inmate information. This form is designed to choose and track the movements to report as required by state laws. You should only check one type of movement. As with all iSOMS reports, you can choose the report style, enter info to narrow the search, and choose to view, download, or email the report.





The **Warrant Fee Billing Report** will show warrant fee billing information. As with all iSOMS reports, you can choose the report style, enter info to narrow the search, and choose to view, download, or email the report.



The **Intake Date Forms** will show intake information over a specific time frame for specific charge codes. You must choose a charge code to view these forms. As with all iSOMS reports, you can choose the report style, enter info to narrow the search, and choose to view, download, or email the report.



Sentencing

Purpose and Overview

This section will review methods to compute the scheduled release date of inmates. There are two methods to compute the scheduled release date in iSOMS, the *simple sentencing* and *per charge sentencing* methods. Your agency will decide which method to use, and only people with the correct security permissions will be able to enter sentence information.

The **Simple Sentencing method** only looks at information entered in the sentencing tab and only uses one set of sentencing information, which is entered in the booking records.

The **Per Charge Sentencing method** uses each of the charges and computes a scheduled release on each charge. Then iSOMS evaluates them based on concurrent or consecutive methods to provide a scheduled release date.

For either method, a year is equal to 365 days. (This 365 day count is used even on leap years.) When calculating, a month is 30 days, no matter what month it is. For example, even though January has 31 days in it, it is counted as a 30 day month. February, even though it will have 28 or 29 days, will still be counted as a 30 day month. A day has 24 hours.

There are two requirements to use either method:

1. Granting **security privileges** to the Sentencing Officers to access the information.
2. Choosing the **setting** to determine which method is being used.



IMPORTANT: Only a person with Super User permissions can change these settings and set allow security access for the sentencing officer. By default, "**NO USER**" has rights or access to update the fields on Sentence Tab in Booking. You must give that person rights regardless of which method is used. This is detailed on the following pages.

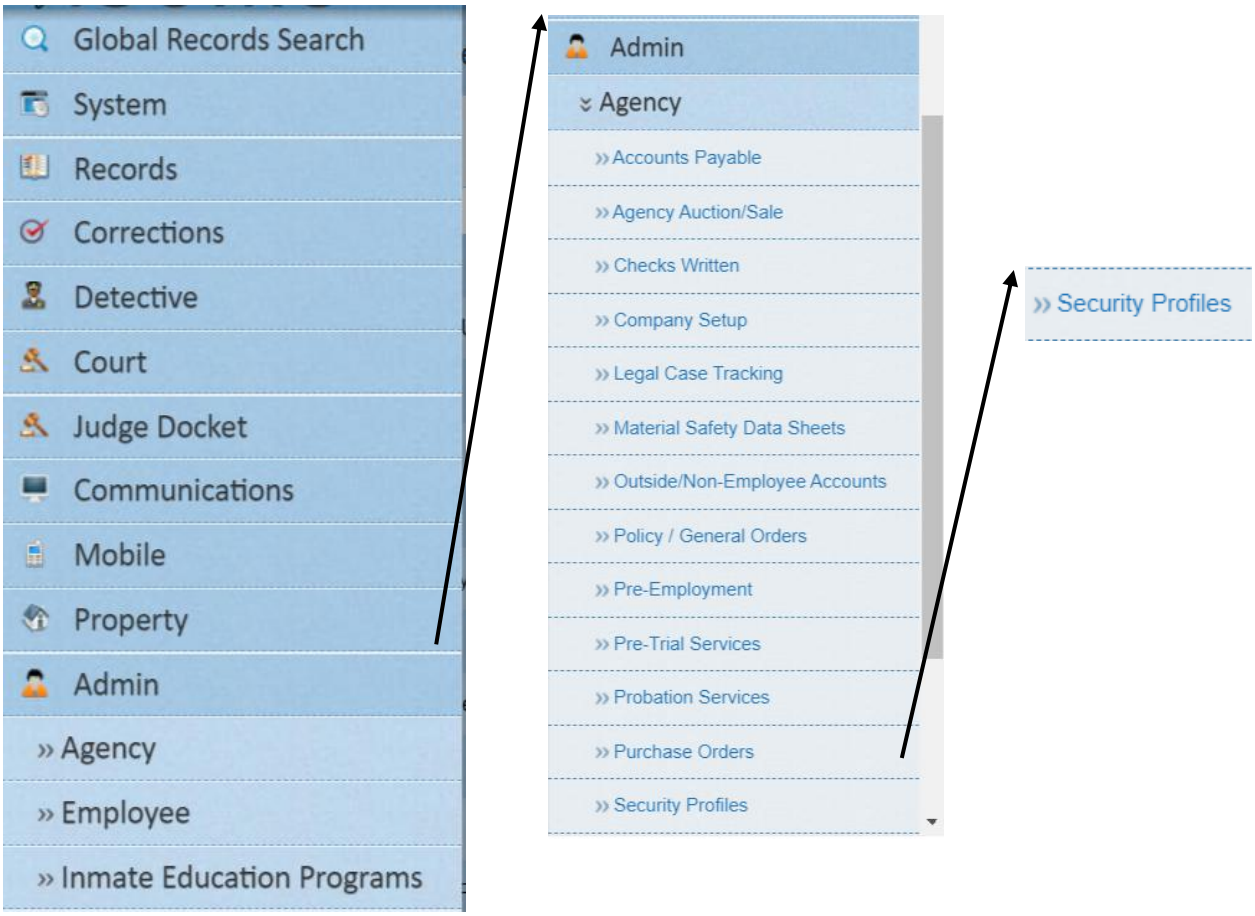
Security Profile Updates

Whether you are using the **Simple Sentencing** or the **Per Charges** method, either method requires security privileges. You need to enable security privileges to *View/Edit Program* in "**BOOKING**" and then *Add/View/Edit Program* in "**BOOKING SENTENCE**".

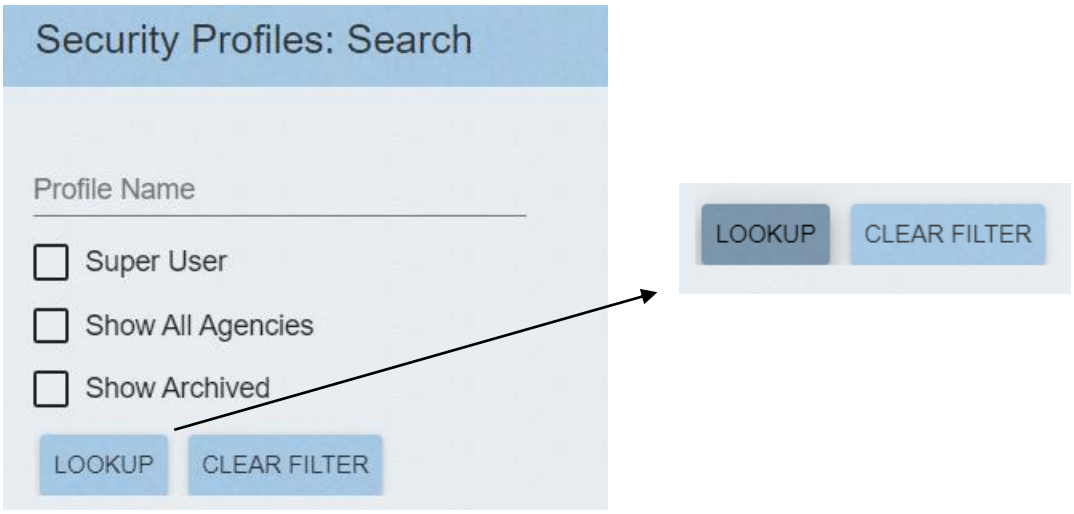
The second iSOMS security privilege (**BOOKING SENTENCE**) is the one that actually opens up the sentence fields to allow updating them. This security is also the only security that will allow iSOMS to compute scheduled release as you click **SAVE** on each charge on the inmates booking record.

In order to access the settings for security privileges, you need to navigate to **Security Profiles** underneath Admin, Agency tab.

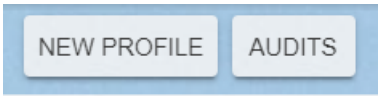
On the Home page, Choose **Admin → Agency → Security Profiles**



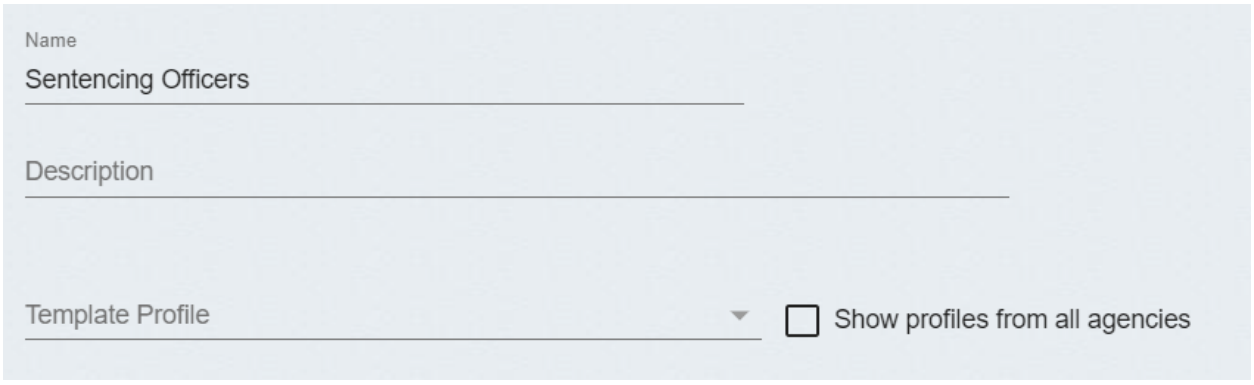
This will open the **Security Profiles Search** screen. You can click **Lookup** to see all the profiles. Double-click the one you would like to edit or add a new one as described below.



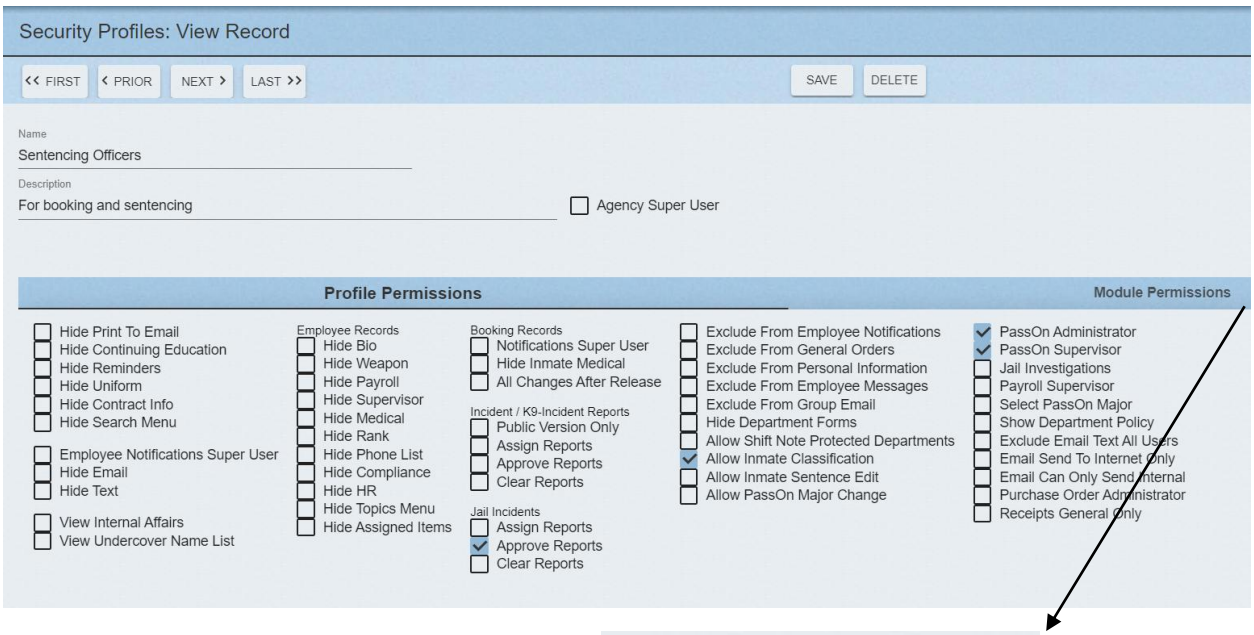
To add a new profile, click **New Profile** in the upper right corner of the search screen.



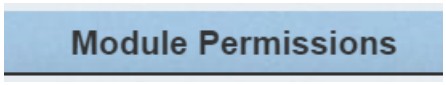
The name of the security profile is not critical. We will use **Sentencing Officers** here just for reference, but just ensure that you assign that profile to the correct users later.

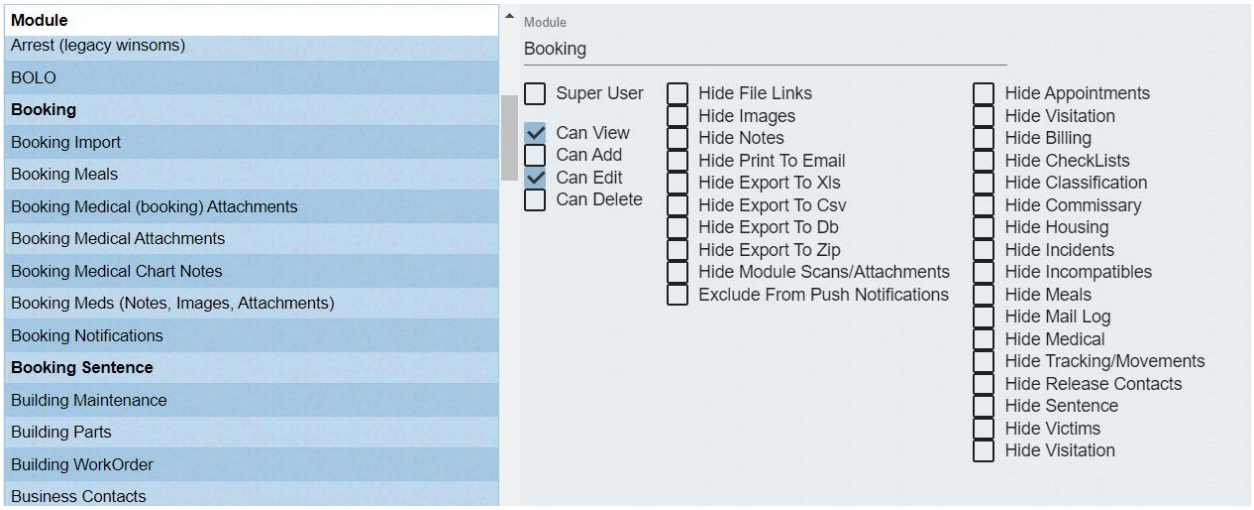


After you choose or add a new security profile, you will view the profile on the next screen.

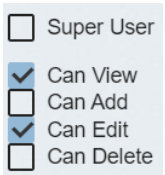


Click on the **Module Permissions** tab, and then scroll down to the **Booking** module.

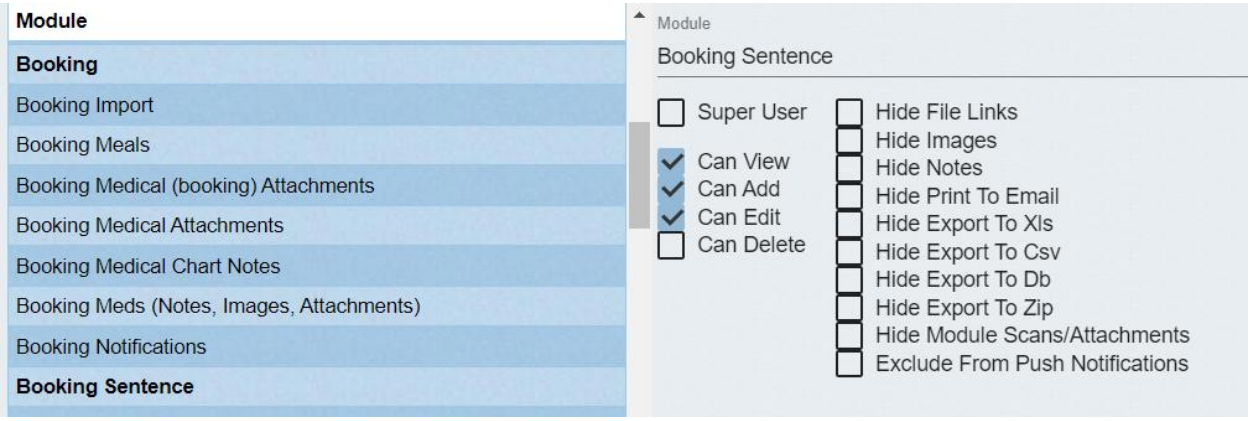




IMPORTANT: Notice Booking *Can View* and *Can Edit* should be checked. This allows this security profile to get into the booking module itself. Without this, they cannot even look up the inmate in the records.



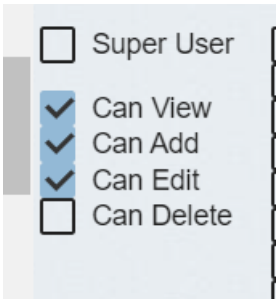
Continue to scroll down in the **Module Permissions** tab, and then scroll down to the **Booking Sentence** module.



The **Booking Sentence** is vital for this security profile because it enables the fields for editing and allows iSOMS to compute the scheduled release date. Only when someone with this security permission clicks **Save** on the Main Booking (or each of the inmate's charges) will iSOMS process the sentence and compute the scheduled release date.

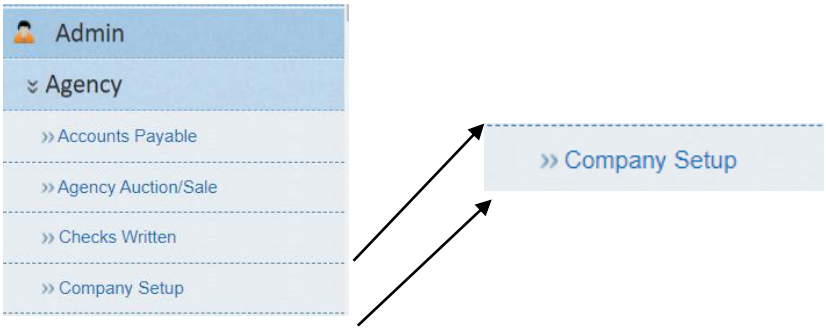
Make sure you check these boxes in this module permissions:

- ☑ Can View
- ☑ Can Add
- ☑ Can Edit

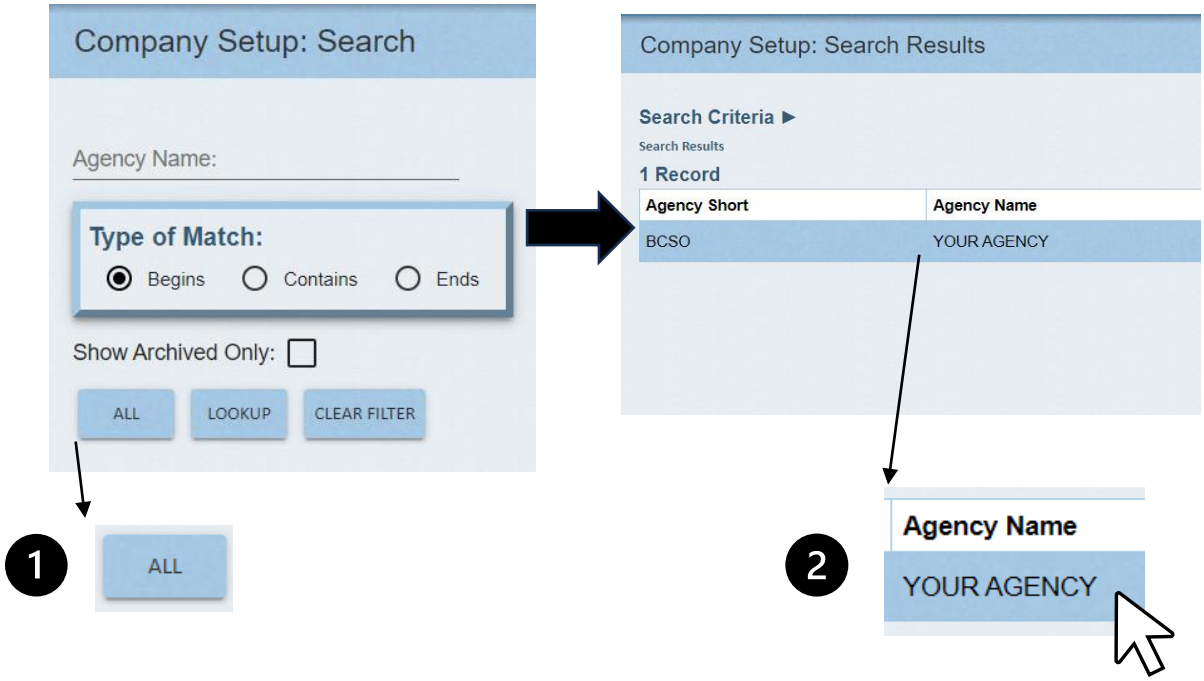


Changing the Company Setup Setting

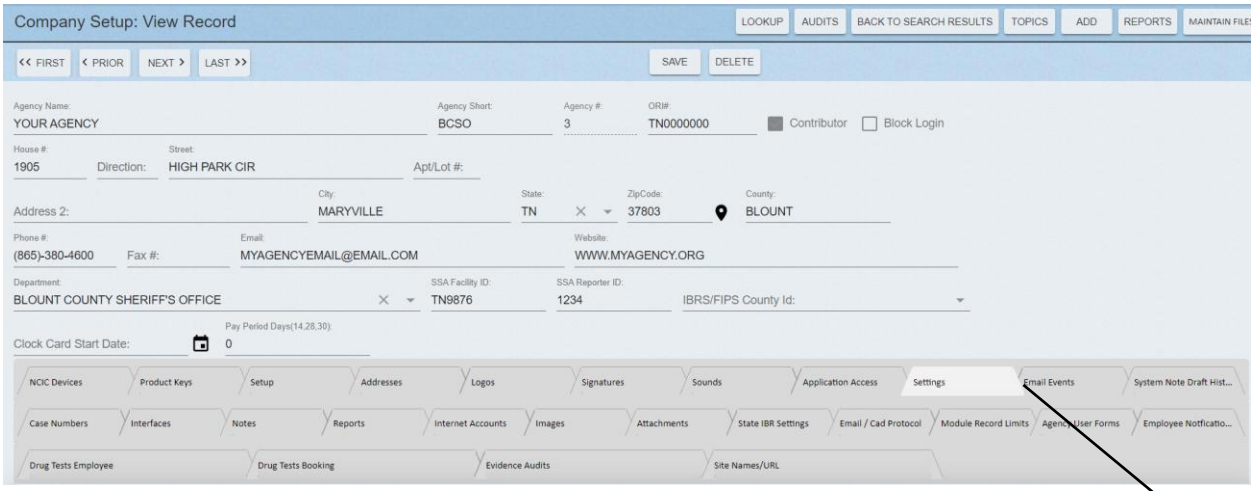
On the Home page, choose **Admin → Agency → Company Setup**



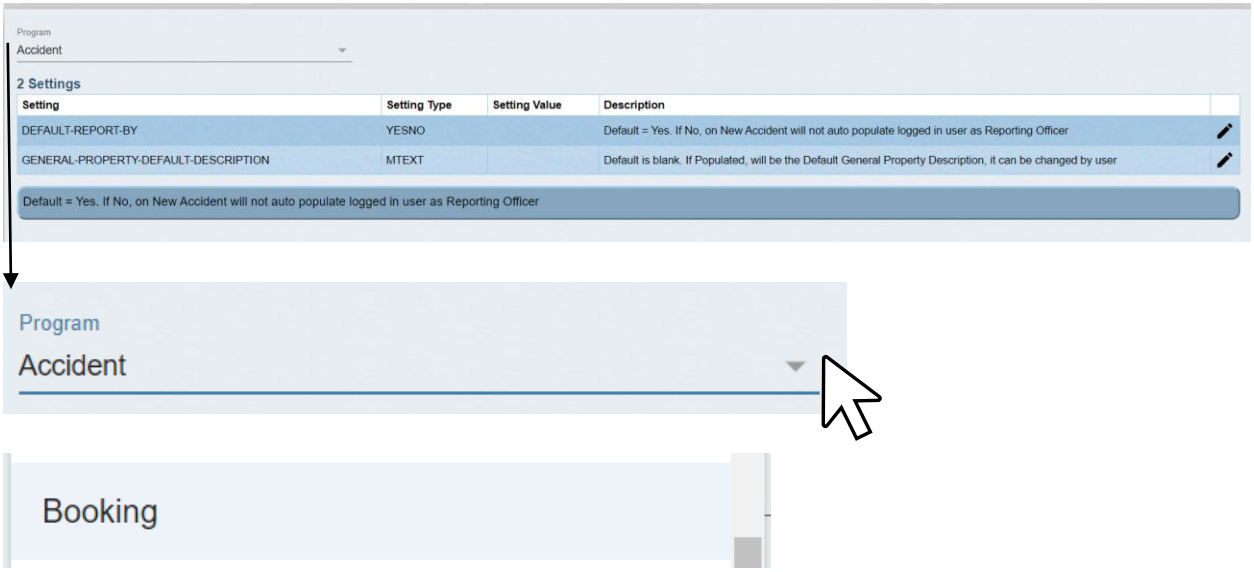
On the Company Setup Search screen, select **ALL** and then double click your agency's name on the table.



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



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.



Then scroll through the settings to **SENTENCE-ESTIMATED-RELEASE-ONLY-SENTENCE-MODULE**. Double click on that row and answer the setting with a Y-(yes) or N-(no).

Setting	Setting Type	Setting Value
SENTENCE-DEFAULT-PROGRAM-CREDIT-HOURS	MTEXT	
SENTENCE-ESTIMATED-RELEASE-ONLY-SENTENCE-MODULE	YESNO	YES

The default is **NO**. When the setting is **NO,** you are using the **SENTENCING** method. This means iSOMS will use the single booking information to compute scheduled release and not evaluate each of the charges.

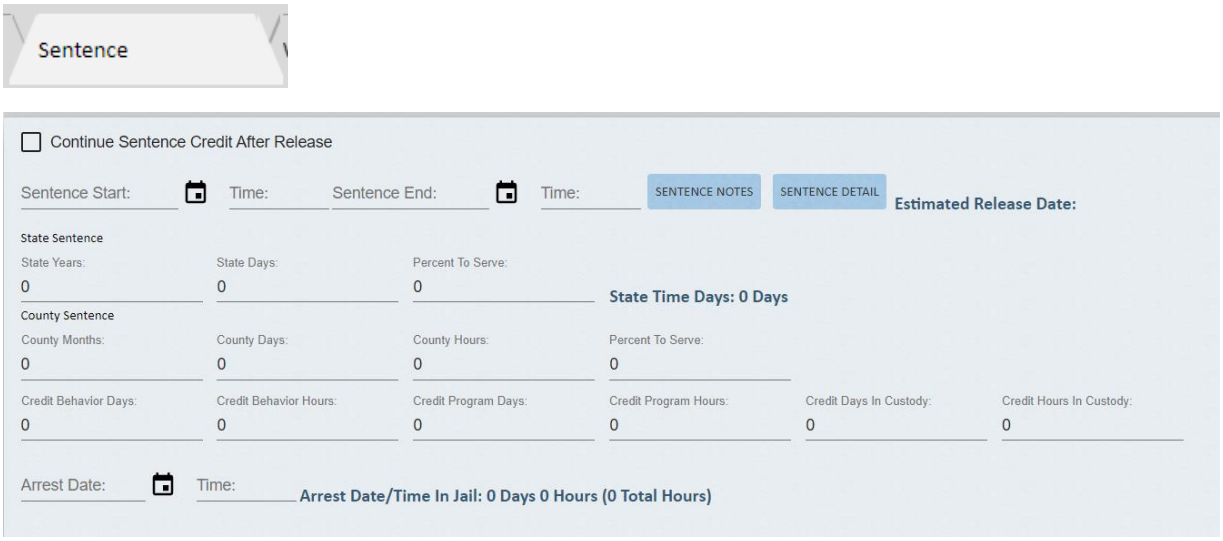
Change to **YES** if your agency wants to use the **CHARGES** method.

REMINDER: Only users who have been given security permissions to the sentencing modules will be able to enter information.

Simple Sentencing Method for Sentencing

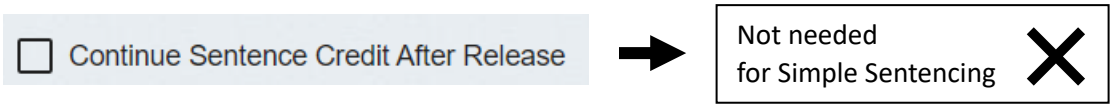
This section describes using the **Simple Sentencing Method** for sentencing when in the Booking Record. If you want to use multiple charges, see the **Per Charges Method** section for more information.

When you click on the Sentence Tab under the Booking you are viewing, you will see the following fields that can be filled in.

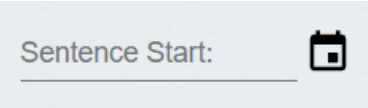


IMPORTANT: Users with booking *View* rights can view this tab, but only users with *Add/Edit* rights to the Booking Sentence Module can enter data into the fields. By default, NO User has access to these fields. (For more details, see *Security Profile Updates* section above.)

Note: The **Continue Sentence Credit After Release** checkbox is used for the Charge by Charge version of Sentence release date. Its purpose is to allow the sentencing officer to still compute Credit for Behavior and Program credits even if the inmate has been released from your facility. This is used when the inmate is being housed at another agency, but they are also getting sentence credit for charges at your agency. This is ***not*** used in this computation.



Let's examine each of the fields on the Sentence tab:



Enter Sentence Start Date here to ensure proper functioning of release date calculations.

To activate the sentence computation, you should enter the first/initial Sentence Start date on this screen. If you have a specific time that you want the sentence to start, you can enter it in this first time box to the left.





Sentence End Date should only be used if the sentence is calculated manually.

DO NOT fill in the sentence end date or time if you want iSOMS to compute the sentence end date. If you enter a sentence end date in any of the sentence end fields, iSOMS will **not** compute a sentence end date. If you do it, the date you entered will be the sentence end date. Only use that option if you need a specific sentence end date.



Sentence Fields

We use these fields to calculate the sentence automatically. Fill in the years, days, and any credit towards time served, and iSOMS will automatically calculate the release date for the inmate. (Make sure to see the time reminders on the next page to ensure that you are inputting the times properly. For example, months are counted in 30 day intervals, with no regard to the calendar month. See the next page for more information.)

TIME REMINDER: A year is equal to 365 days. (This 365 day count is used even on leap years.) When calculating, a month is 30 days, no matter what month it is. For example, even though January has 31 days in it, it is counted as a 30 day month. February, even though it will have 28 or 29 days, will still be counted as a 30 day month. A day has 24 hours.

If you want the inmate to serve a specific number of days, use *only* the **days** value. This avoids confusion with months being 30 days no matter what month it is on the calendar.

Example Sentences

Years Entered (365 days)	Months Entered (30 days)	Days Entered (1 day per)	Total Days Served (Actual)
1	2	15	440
0	3	0	90
0	1	10	40
0	5	40	190

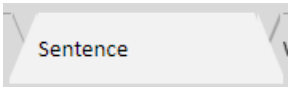
Each of these calculations ignores the calendar month and simply multiples by the unit. So, the gray sentence in the first row would take years (1 * 365) + months (2 * 30) + days (15 * 1) to get 440 days in total.

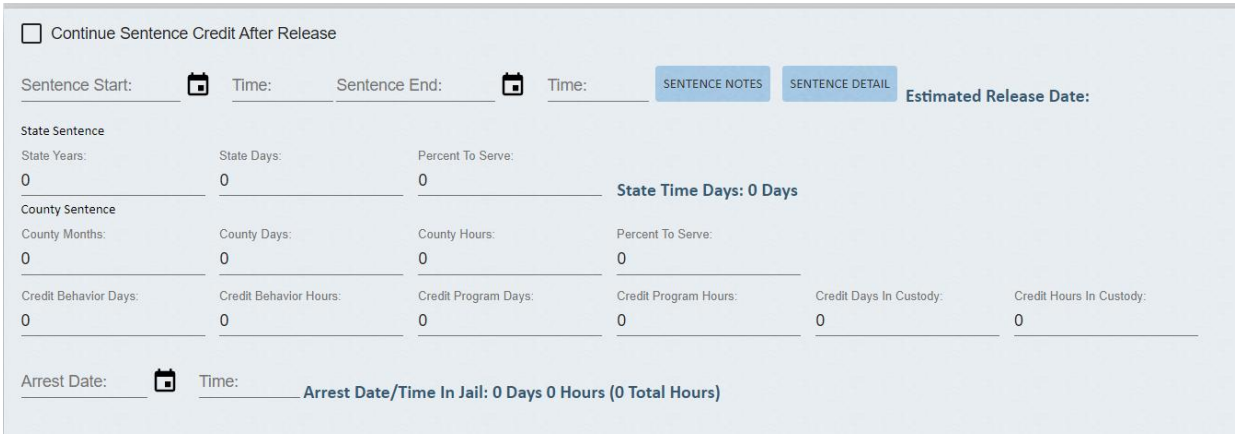
Any credit entered simply subtracts as it counts as time taken off the sentence.

Per Charges Method for Sentencing

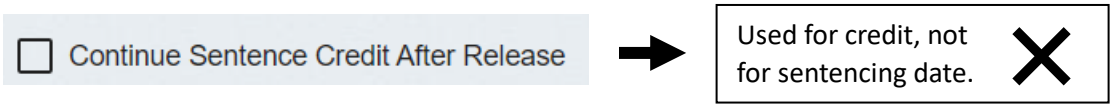
The **Per Charges Sentencing** method uses the sentence information from multiple charges to compute an estimated release date. Make sure the value is set to Y for yes in the Booking setting **SENTENCE-ESTIMATED-RELEASE-ONLY-SENTENCE-MODULE** in company setup to be able to use this method.

When using the **Per Charges** method, you will enter sentence information for each charge in the **Charges** tab. We will first go to the *Sentence* tab to clear up one date that should be entered first, and then input sentencing information in the *Charges* tab. We will first go to the Sentencing Tab to clear up one date that should be entered first, and then input things in the Charges tab.



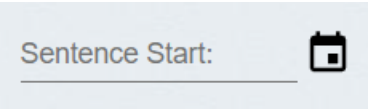


Note: The **Continue Sentence Credit After Release** checkbox is used for the Charge by Charge version of Sentence release date. Its purpose is to allow the sentencing officer to still compute Credit for Behavior and Program credits even if the inmate has been released from your facility. This is used when the inmate is being housed at another agency, but they are also getting sentence credit for charges at your agency. This is ***not*** used in this computation.



Note: To activate the sentence computation, you should enter the first/initial **Sentence Start** date on this screen. Each charge will compute a scheduled release date based on sentence and credits, but this date overrides earlier start dates on charges.

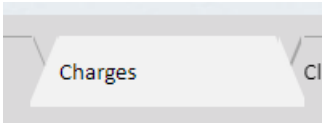




Enter Sentence Start Date here to ensure proper functioning of release date calculations.

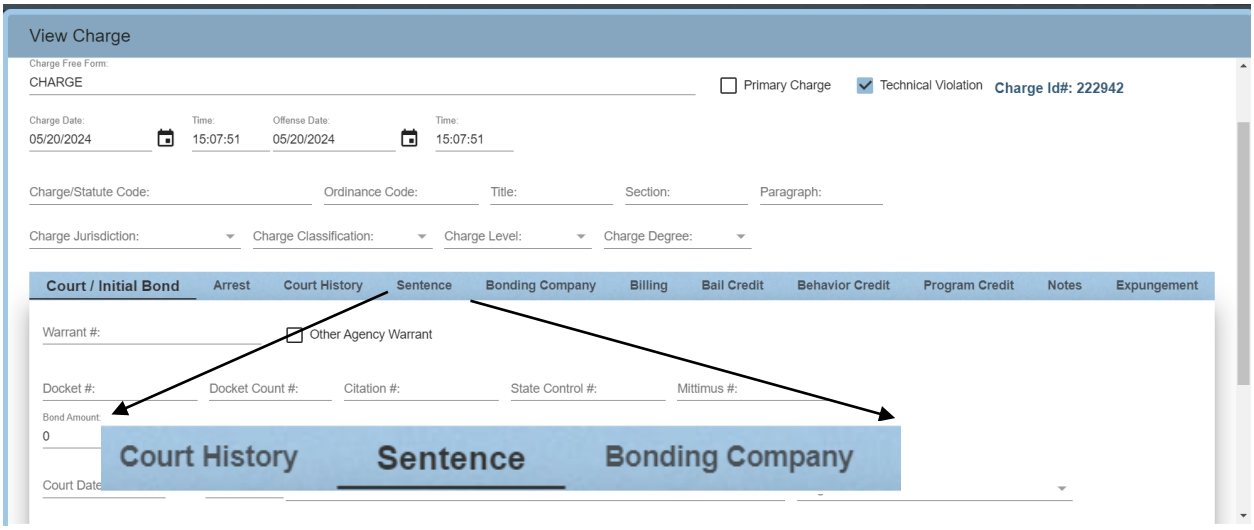
IMPORTANT: When you use the **PER CHARGES SENTENCING** method, you should not enter sentence information here other than the start date. Instead, you should use the following directions to enter sentencing information into the charges.

Entering Charges



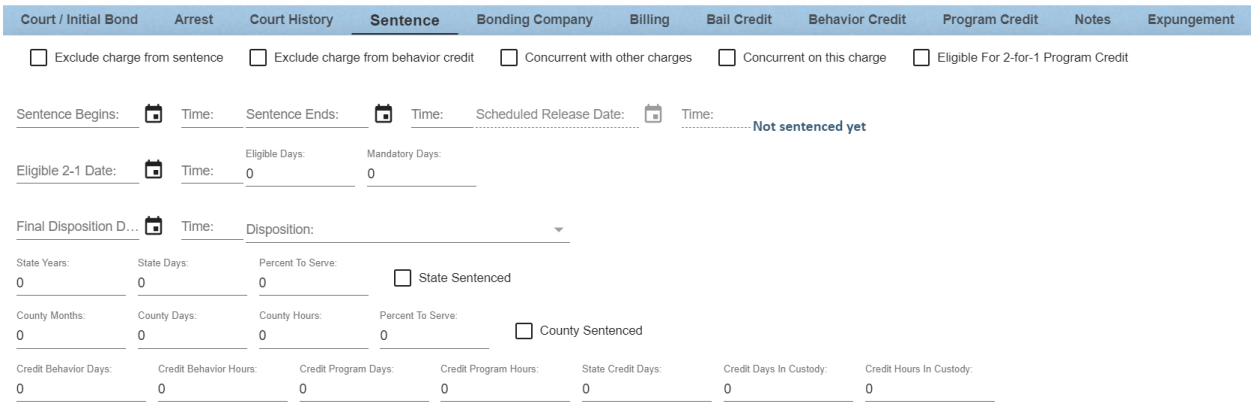
Navigate to the **Charges** tab in the booking.

Click the **Sentence Subtab** on each charge you are entering.



DO NOT fill in the sentence end date or time if you want the program to compute the sentence end date. If you enter a sentence end date in any of the sentence end fields, iSOMS will **not** compute a sentence end date. If you do it, the date you entered will be the sentence end date. Only use that option if you need a specific sentence end date.

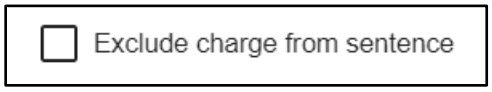
On each charge, fill in the sentence and any credits.



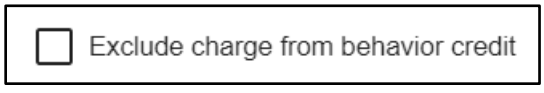
If the Sentence Beings is empty, this charge will not be evaluated for the scheduled release date.



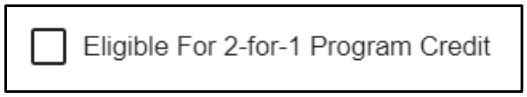
This is here because of complicated sentences where the inmate has several charges from several courts, and they are mixed (concurrent and consecutive) sentence types. This would allow you, in those cases, to exclude all but one of the charges for sentence scheduling. In summary, if you want the charge to be included for the computation, be sure to enter the sentence start date.



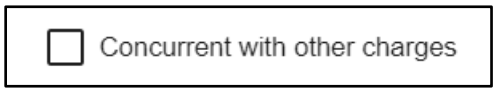
If checked, this charge will not be used as part of sentence calculation.



If checked, when using the utility program to give inmates daily behavior credit, checking this box would exclude this charge from that credit transaction.

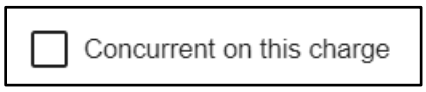


If checked, when using the utility program to give inmates daily program Credit, checking this box would include this charge in the credit transaction.



If checked, when computing scheduled release, the system will group all **Concurrent** charges together and find the furthest out date/longest sentence to use. If this is *not* checked (the **default**), the computed sentence will be added together with other charges.

Here is an example for **Concurrent** charges: say an inmate has two charges and both charges were sentenced on the same date. One charge has 10 county days to serve, and the other charge has 30 county days to serve. If **Concurrent** is checked on both of the charges, the system will use the Charge with 30 Days as the longest sentence. If both charges do not have this box checked, the 10 day sentence and the 30 day sentence will be added together for a total of a 40 day sentence.



This checkbox relates to when an inmate has both State Time and County Time on this single charge. If the box is checked, the system will determine which of sentences is longer and use it. Otherwise, the sentence for both State and County will be added together.

Here is an example for **Concurrent** charges: say an inmate has two charges (one State and one County) and both charges were sentenced on the same date. The State charge has 1 year to serve, and the county charge has 1 month to serve. If **Concurrent** is checked on both of the charges, iSOMS will use the State Charge with 1 year as the longest sentence. If both charges do not have this box checked, then the 1 year state sentence and the 1 month county sentence will be added together for a total of a 1 year and 1 month sentence.

On each charge, as you click **Save**, iSOMS will evaluate all non-excluded charges (for the inmate) that has a Sentence Begins date. It will group all concurrent charges to find the longest concurrent sentence, and then add that to all other charges sentence to compute a final scheduled release date and time.

Results

iSOMS will update the release date and time on the **SENTENCE** Tab on the main booking. This way it can be easily viewed by officers.

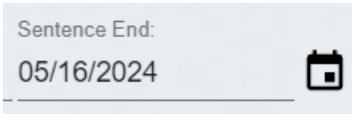
On the **Charges** tab, then **Sentence** heading, a new label has been added to show the Inmate Scheduled Release Date which would be for all charges.



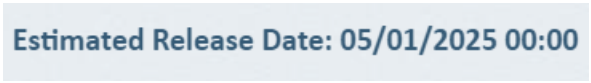
NOTE: If you enter a **sentence ends** date on the Main Booking Sentence Tab, that will be the sentence ends date, *regardless of charges*. This should allow you to have the best of both worlds when relating to only state inmates, who may have to be released on a specific date.

If the Sentence Start Date is missing from the main booking sentence tab (the date that ensures proper sentencing), you may see **Inmate Not Yet Sentenced.**

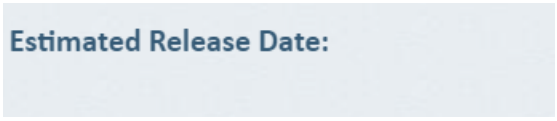
If the Sentence Ends Date is manually entered on the main booking **Sentence** tab, it will show the Inmate Schedule Release (manual) with that date/time.



If an Estimated Release Date has been computed through any means, it will be displayed.



If no Estimated Release Date has been computed, the area will be blank/empty.



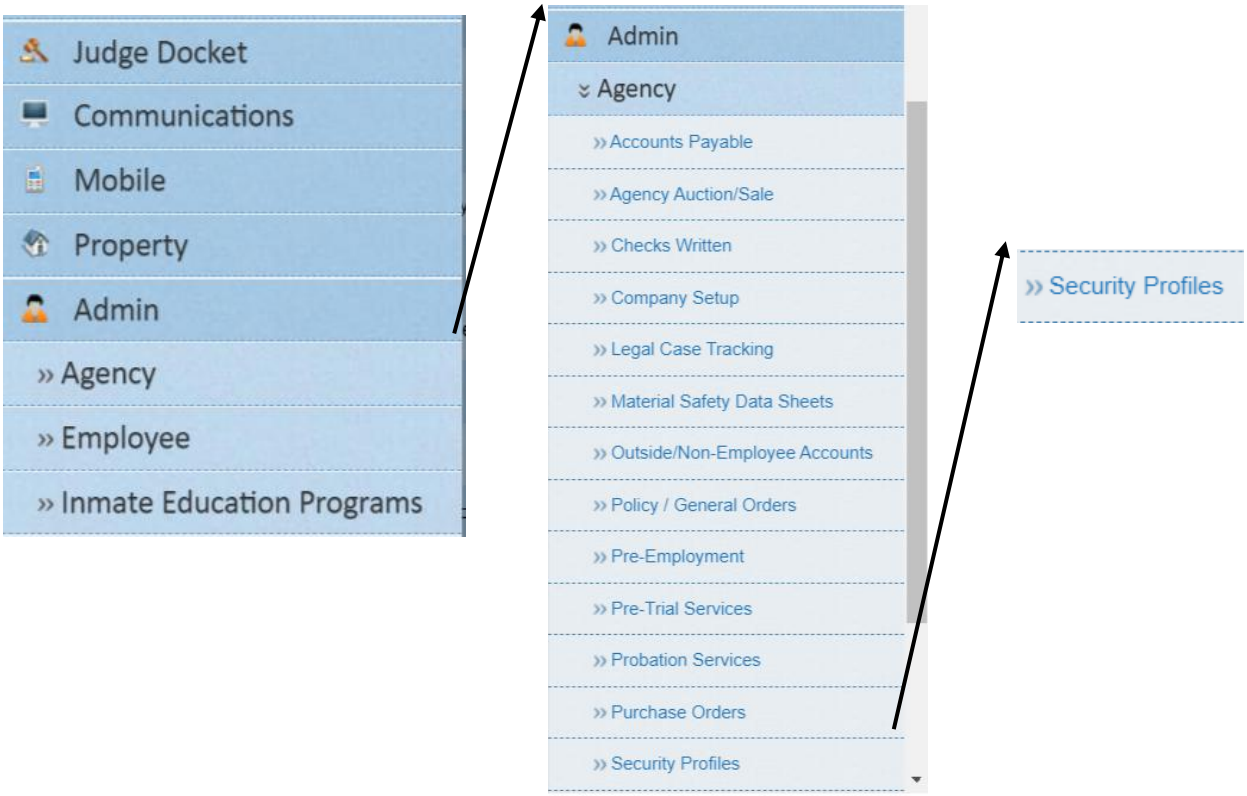
Board Billing

This section 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.

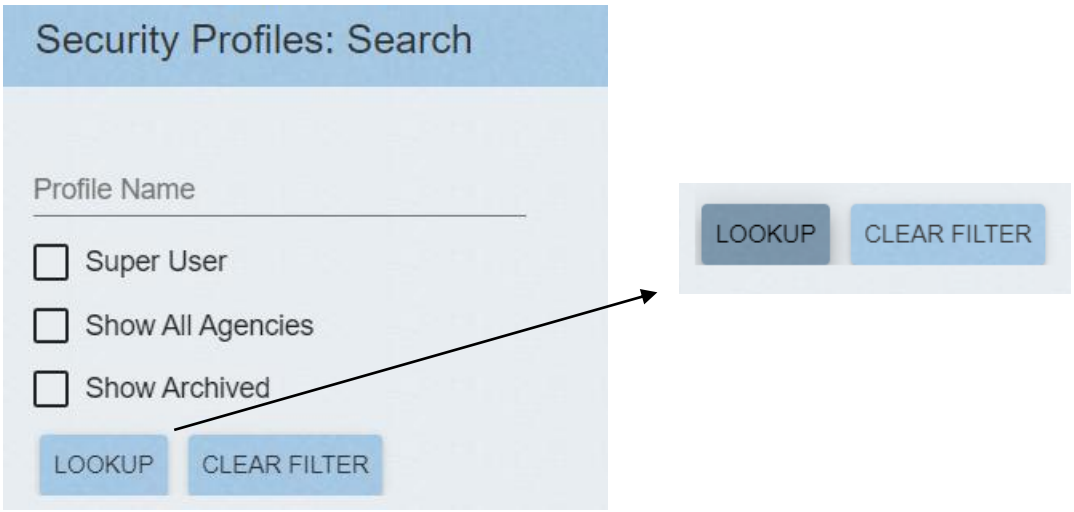
We will review how to add security profiles to make sure a user can edit and view the proper settings. We also will cover adding new auto-board billing so iSOMS will input the billing charges automatically when you add a new booking.

Booking Security Profiles

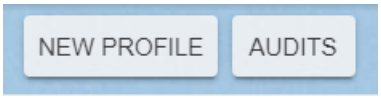
On the Home page, choose **Admin → Agency → Security Profiles**



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



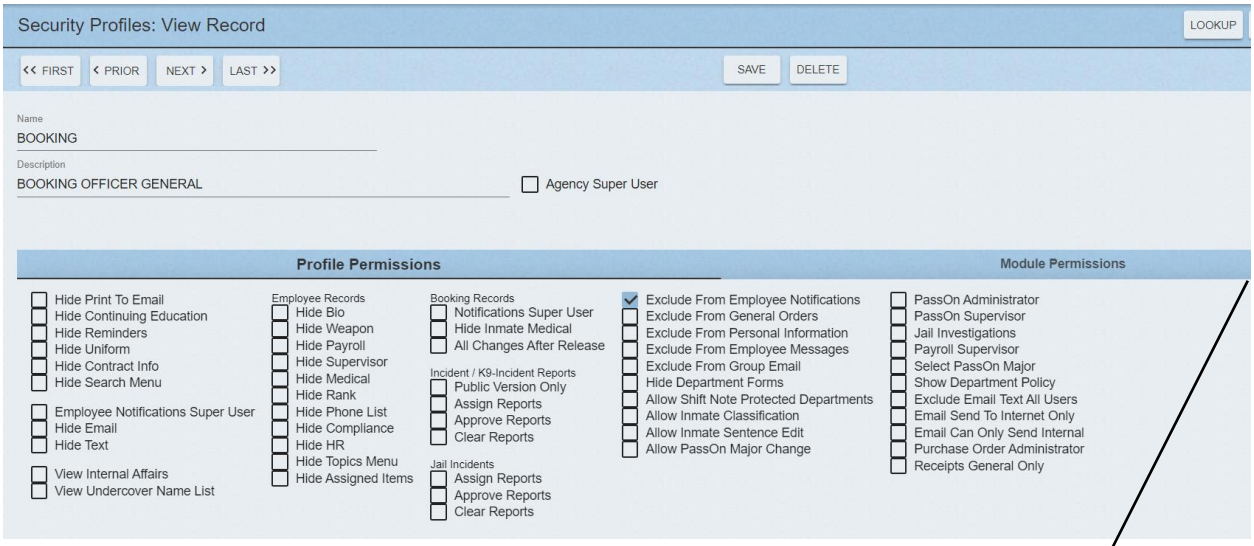
To add a new profile, click **New Profile** in the upper right corner of the search screen.



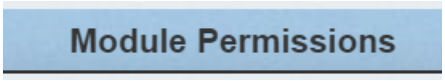
The name of the security profile is not critical. We will use **Booking Officers** here just for reference, but just ensure that you assign that profile to the correct users later.

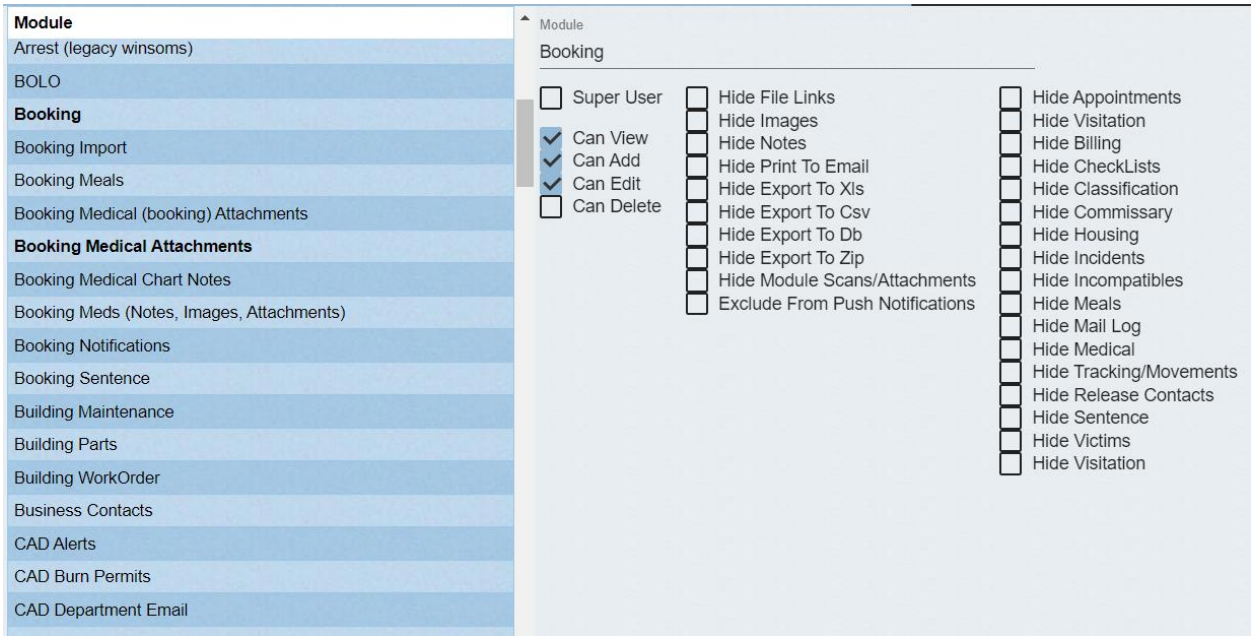


After you choose or add a new security profile, you will view the profile on the next screen.

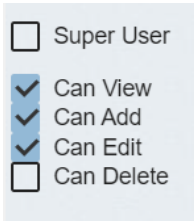


Click on the **Module Permissions** tab, and then scroll down to the **Booking** module.



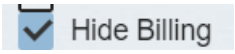


IMPORTANT: Notice Booking *Can View, Can Add,* and *Can Edit* should be checked at minimum. This allows this security profile to get into the booking module, add new records, etc. Without this, they cannot add or look up the inmate in the records.



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.



For example:

CAN see board billing



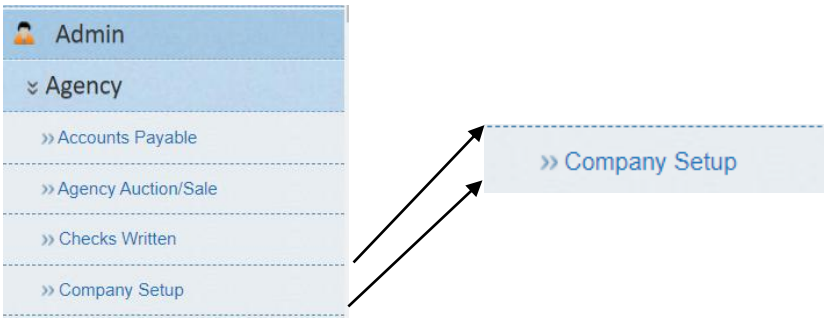
CANNOT see board billing



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, because that is described in the next section on page 253. 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 252.

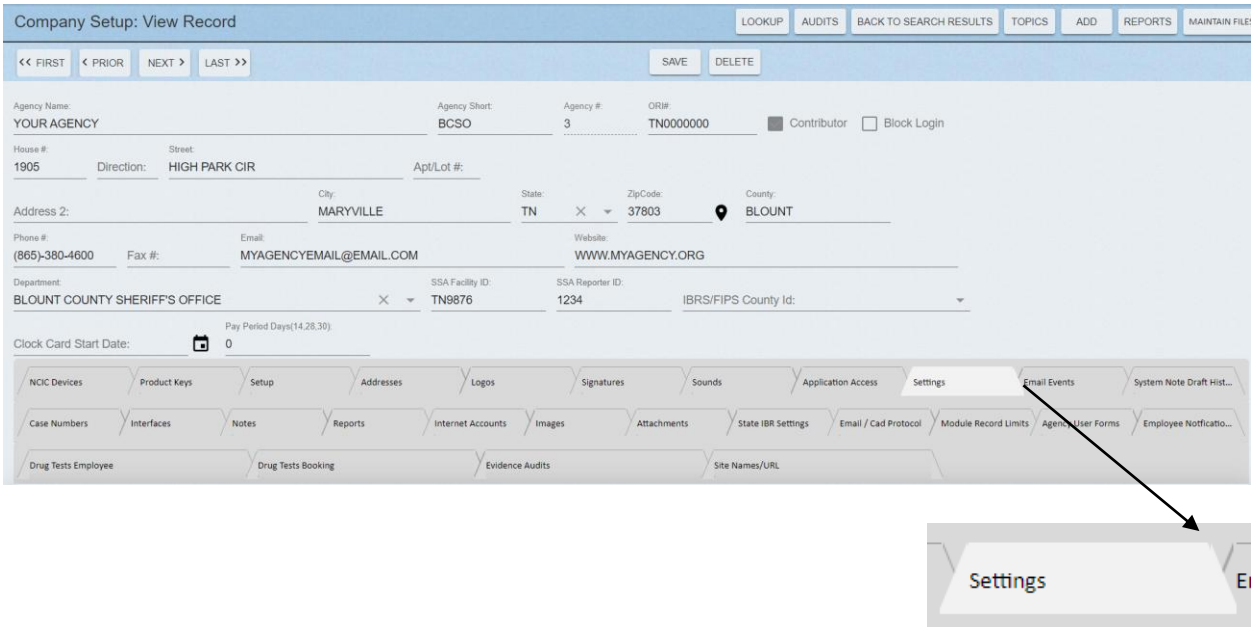
To edit the auto-billing settings, choose **Admin → Agency → Company Setup**



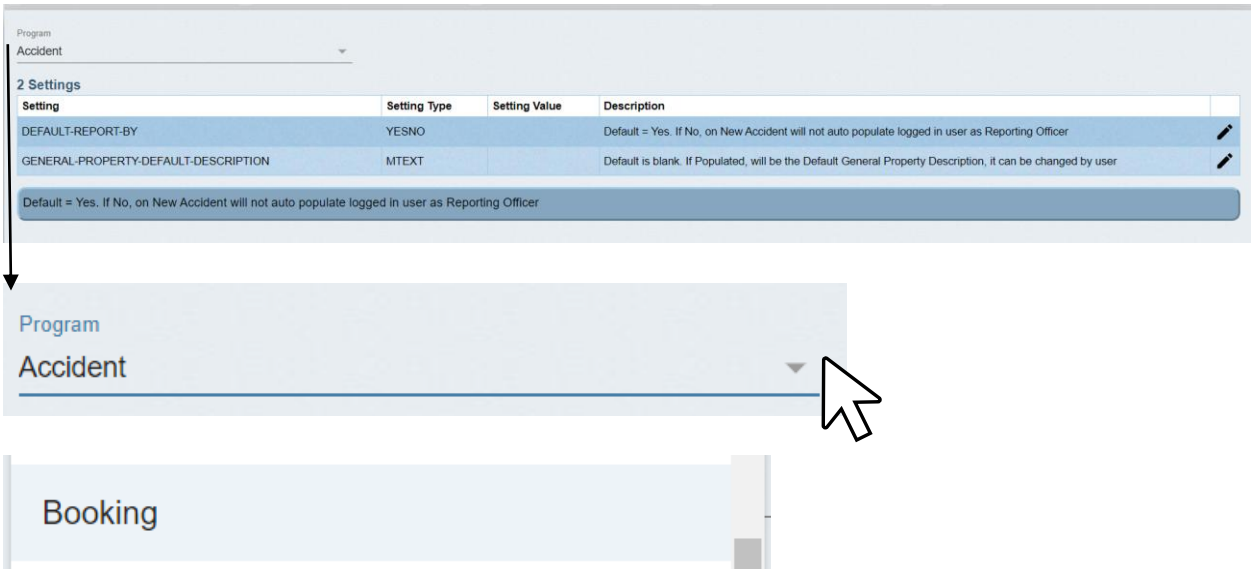
On the Company Setup Search screen, select **ALL** and then double click your agency's name on the table.



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



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.



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

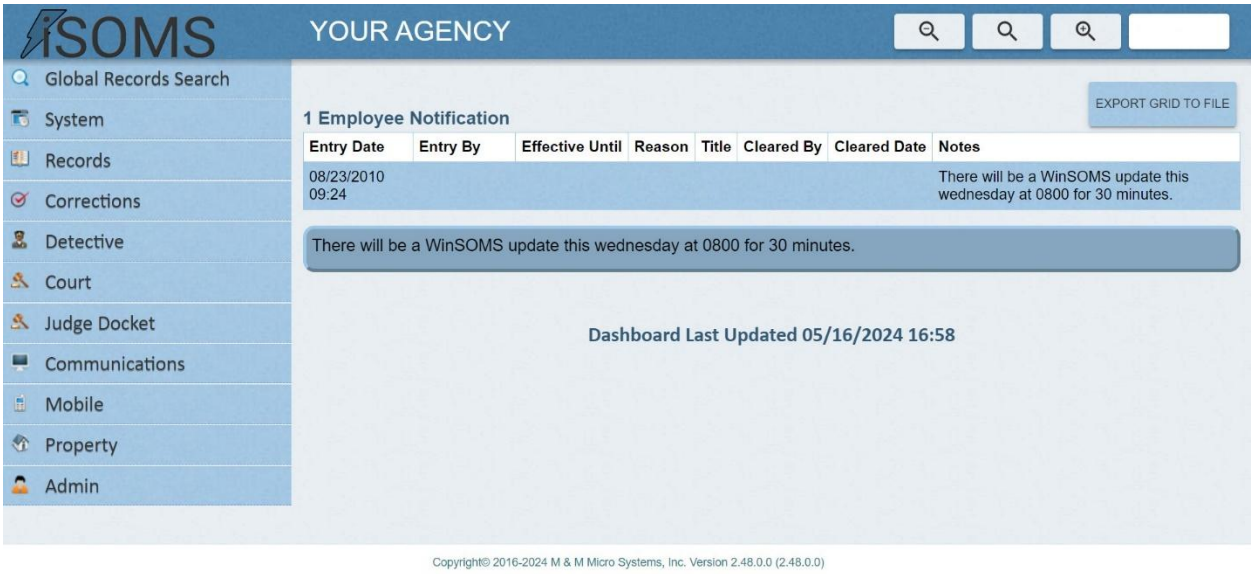
AUTO-COMPLETE-OPEN-BOARD-BILL	YESNO

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.

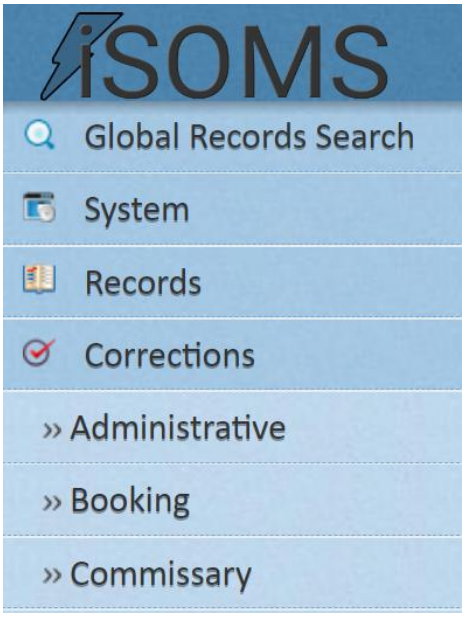
Setting Up Auto-Billing

Begin on the iSOMS home screen.



Navigate to:

Corrections → Booking → Intake/Booking Records

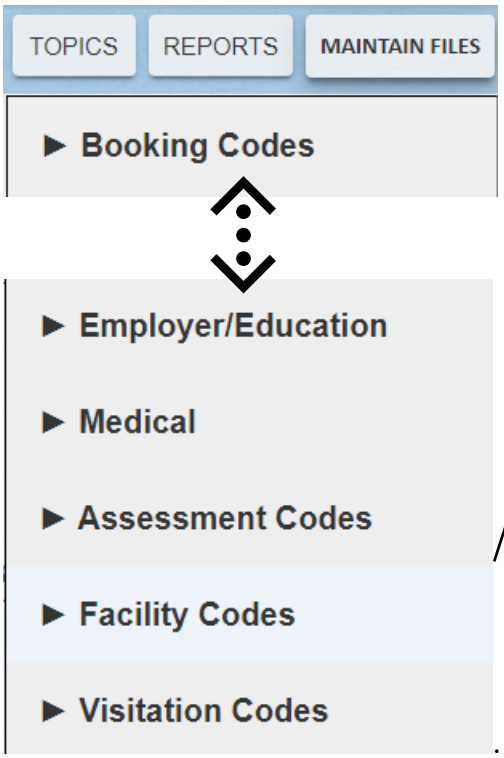


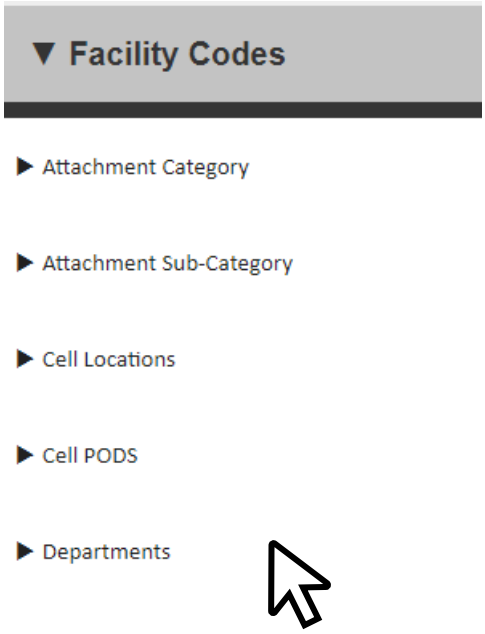


In the booking module in iSOMS, click on the following.

Maintain Files → Facility Codes → Departments

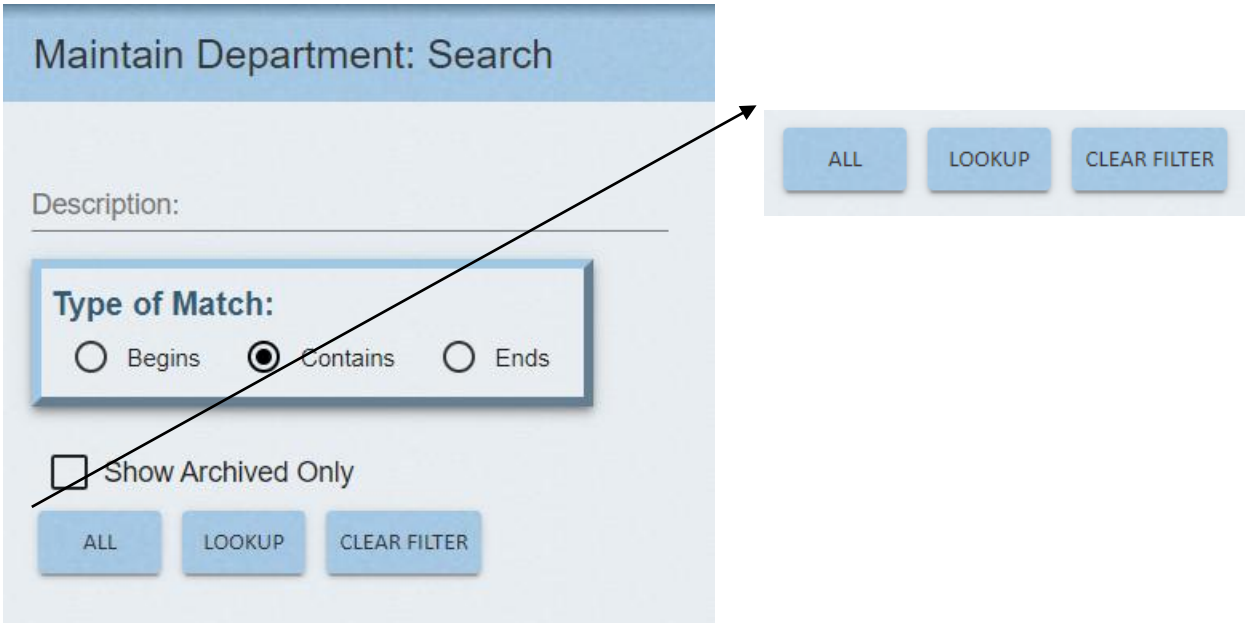






NOTE: On some monitors, it may be necessary to zoom out to see the **Departments** button.

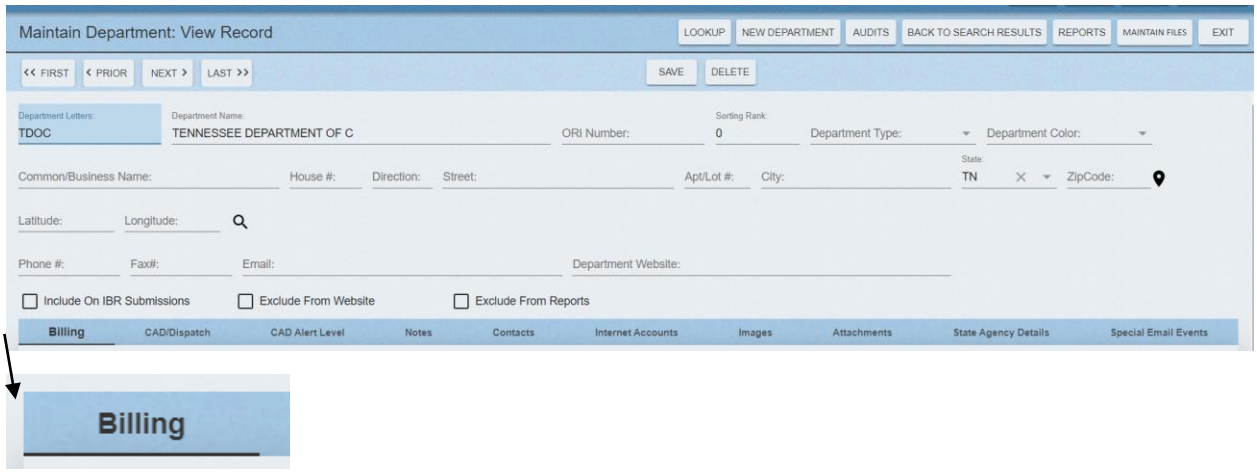
Click on **ALL** on the Maintain Department Search Screen:



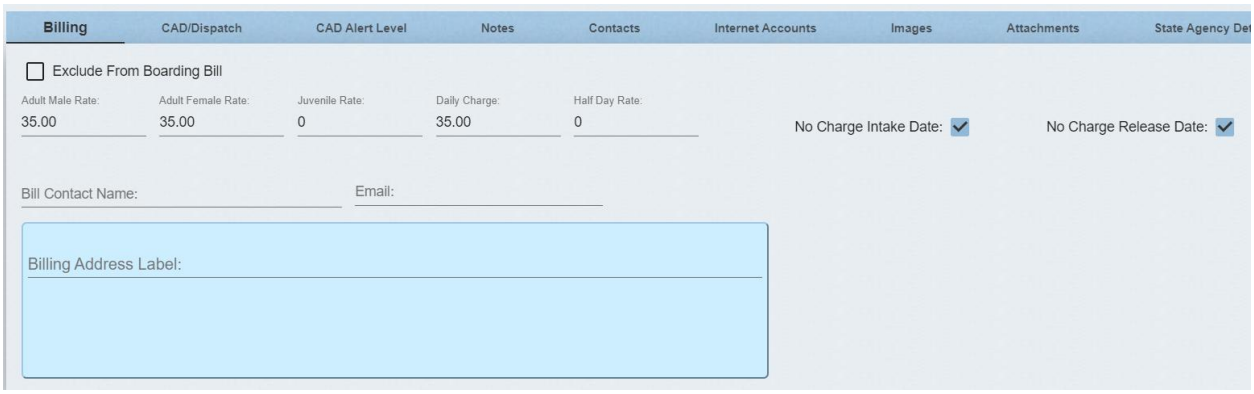
We are looking for the department that is responsible for the board billing. This is typically the department of corrections for the state that your agency is in. For this example, we will use the *Tennessee Department of Corrections*. Find your state DOC or the responsible agency in the list and double-click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

Agency Letters	Department Name
SPD	SPD
STATI	STATI
TDLOC	TDOC 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

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.

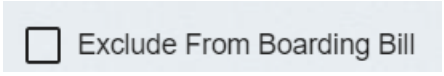


Billing Fields



Exclude From Boarding Bill

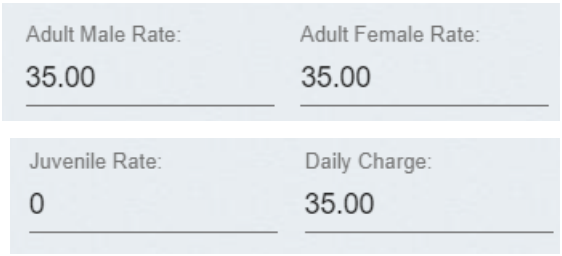
Use this checkbox if you want to exclude this department from Boarding Bills. Obviously since you are setting up board billing for the department you chose, you want to make sure this box is **not** checked!



Fields continued on the next page.

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.



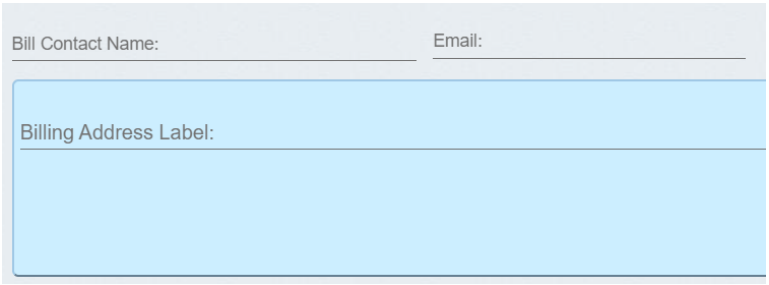
No Charge Intake Date / Release Date

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.



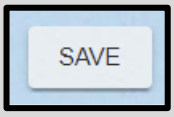
Bill Contact / Name / Email

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.





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

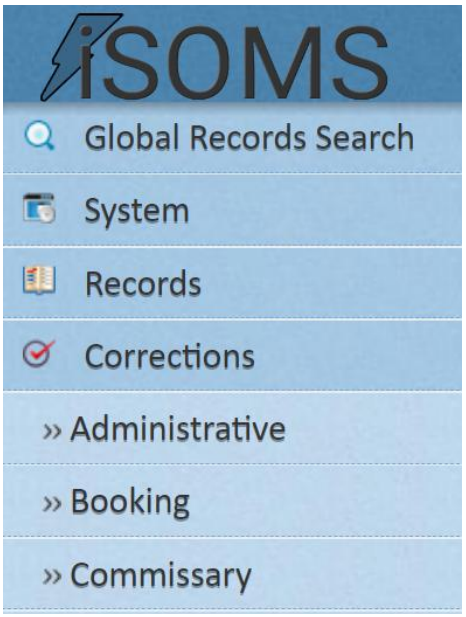


Billing Information in New Bookings

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."

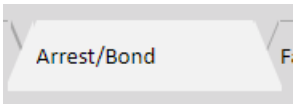
Navigate to your booking records:

Corrections → Booking → Intake/Booking Records





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

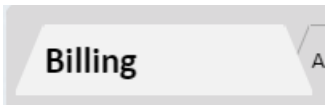


Here you want to edit the **Arresting Agency/Department Responsible** field to the same one you edited in *Maintain Files* (page 255) so that the billing will apply automatically. For our example in this manual, we chose *Tennessee Department of Corrections,* so we put that in this field.

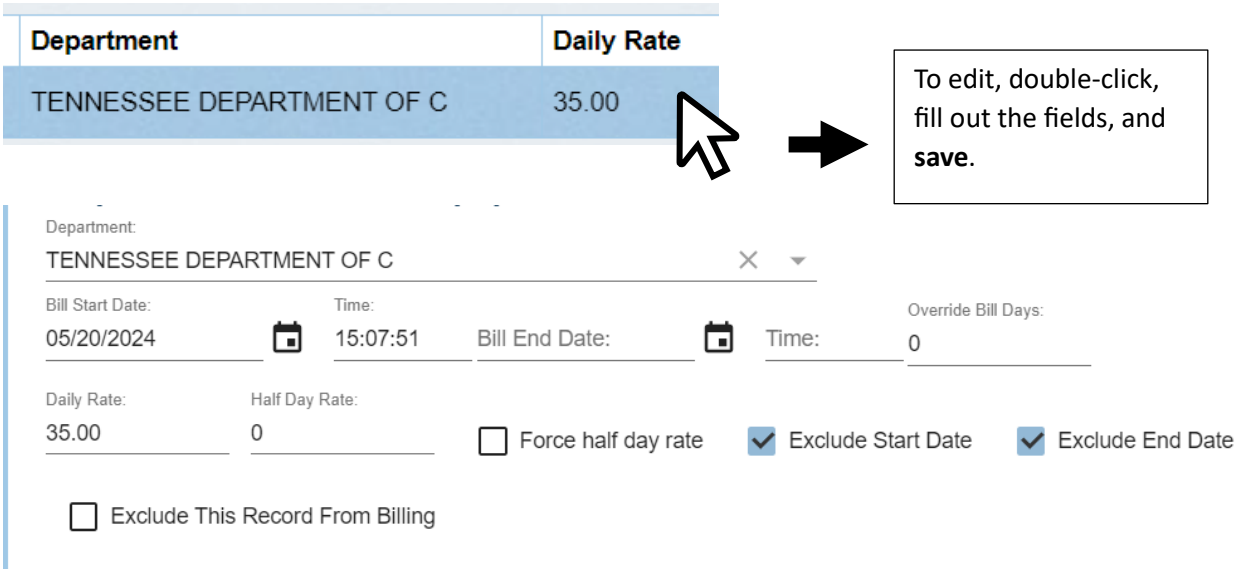


Make sure you click **Save** after filling this out. When you save this booking after adding the Department Responsible, iSOMS will automatically generate the Board Bill from the entry you provided earlier.

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

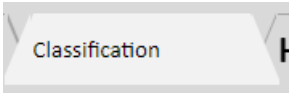


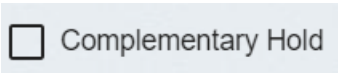
In our example, this Board Bill was automatically generated as soon as we saved the booking record. If you need to edit a booking record manually (perhaps a certain inmate has a different rate), double click on the billing and edit the appropriate fields. However, hopefully the information you added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



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, iSOMS will create a new billing every time you save.

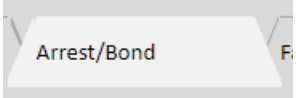




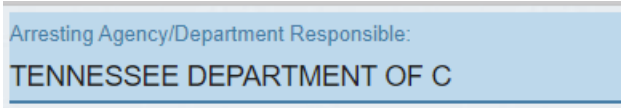
Billing Information in Pre-existing Bookings

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”.

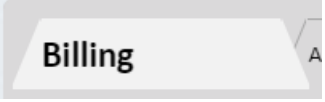
You will begin by looking up a current booking (see “Booking Search Screen” on page 42 for info on looking up bookings). In order for this to work, you need to change the department responsible for the inmate. This change will automatically add a new billing. Once you have found your pre-existing booking, go to the **Arrest/Bond** tab.



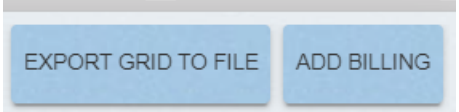
Like for a new booking, you want to edit the **Arresting Agency/Department Responsible** field to the same one you edited in *Maintain Files* (page 255) so that the billing will apply automatically. For our example in this manual, we chose *Tennessee Department of Corrections,* so we put that in this field. Your agency was likely here before, but you should change it at this point to get an accurate board billing.



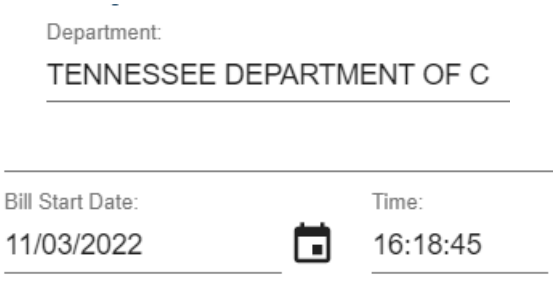
Now you should navigate to the **Billing** tab.



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.



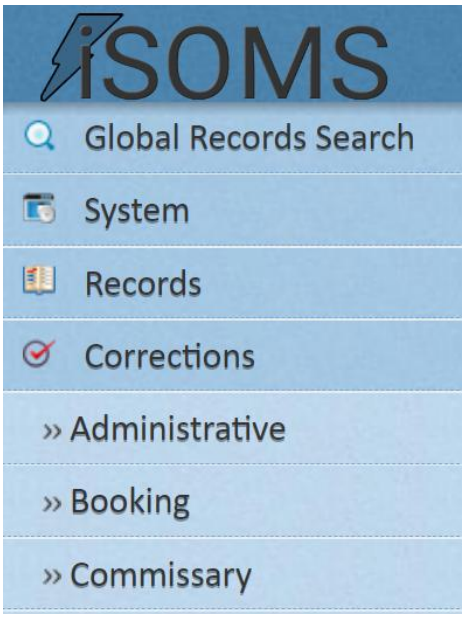
You do not have to edit anything else here: iSOMS will automatically add the appropriate billing rate if you do a report. (Although the rate will stay at zero *here*, iSOMS will use the automatic rates when making the reports.)

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







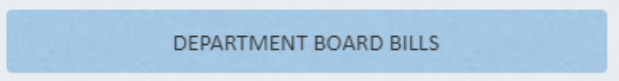
All the headings in the blue bar will take you to different report categories and then the reports available for that category will show in the grid below.



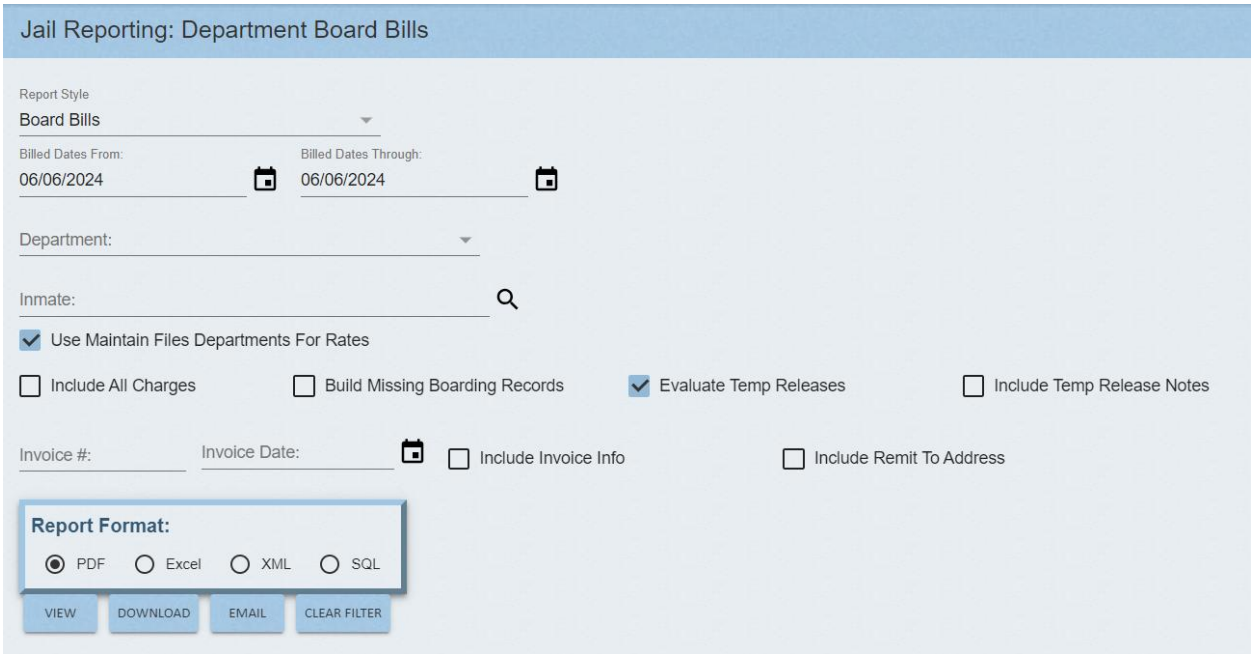
In our case, we want to find **Monthly Reports:**



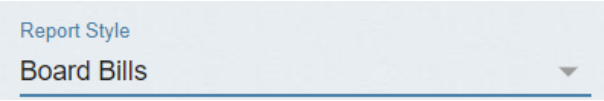
Find the **Department Board Bills** button:

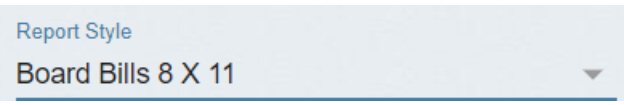


This report will show the board bills over particular billing dates. It will list the inmate's name, booking number, billing rate, and the total billed over the particular billing dates. The fields are explained below.

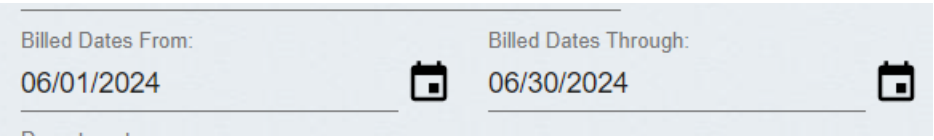


Report Style in this report only changes the paper rotation, but it is available if you need it.

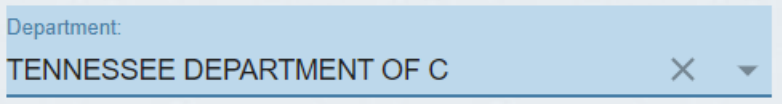




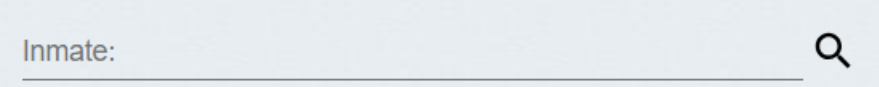
Typically you will do a report on the month, so change the **Billed Dates From** and **Billed Dates Through** to match the month.



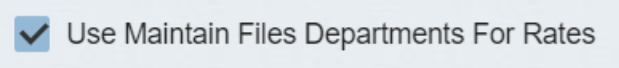
For **Department,** you will want to make sure that you chose the same agency we chose in *Maintain Files* on page 255 (as an example, Tennessee Department of Corrections).



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



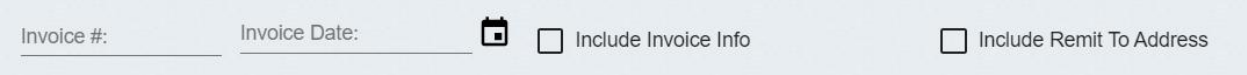
Make sure you check the **Use Maintain Files Departments for Rates** checkbox to use the automatic rates as explained in this guide.



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.



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.



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
0'SHELL, SHANNON KIMBERLY	59	W	F	20240500009	06/01/2024	06/30/2024	30	1050.00
ABBOTT, DARREN LYNN	0	W	M	2020090001	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

Facility Reports and Classifications

This section discusses facility reports and classifications. We will use the *Tennessee Facility Report* as an example of how to classify inmates. The most important part of the facility report is **setup**. Even in WinSOMS, you could add as many Inmate Classification Codes as you needed for internal reporting, but you have to mark on each code a Code Ranking or (better stated in this case) a Report Column Rank. No matter what the code is, you have to tell iSOMS what column on Tennessee Facility Report it is going to be counted in.

Quick Example:

PF = Pre-Trial Felon and PM = Pre-Trial Misdemeanant

They are both Pre-Trial and both needed for reporting in iSOMS, but for the Tennessee Facility Report they are both counted as Pre-Trial Report. This screenshot is from WinSOMS and will be used to show the columns.

1 = DOC, 2 = Less than 1 year, 3 = 1 Year and Over 4 = Parole State/Local

5 = Convicted Misdemeanant, 6 = Pre-Trial Misdemeanant & Pre-Trial Felon

(Anything else is a 7 as it is invalid and not a proper classification for this report.)

Department Facility Report

YOUR DEPARTMENT

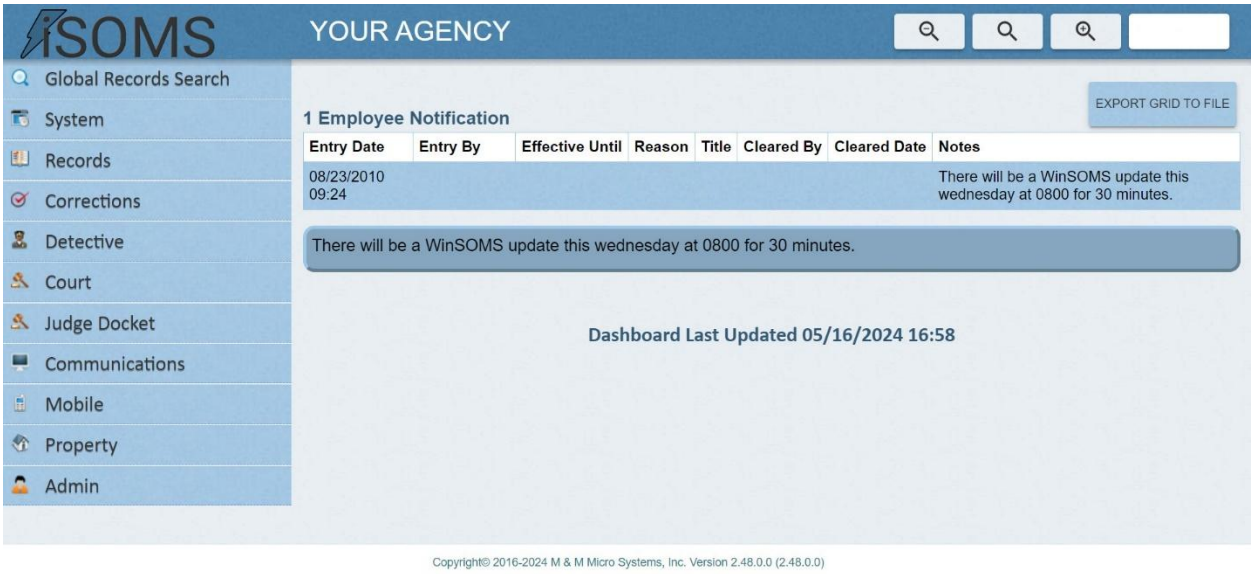
DATE : 07/27/2020
TIME : 02:47:29PM

Page 1 of 1

Date	DOC	Less Than 1 Year	1 Year and Over	Parole Doc/Local		Convicted Mis	PreTrial Mis/Felon		Other	Total
06/01/2020	41	22	68	0	0	2	45	58	0	236
06/02/2020	41	22	68	0	0	2	45	58	0	236
06/03/2020	41	22	68	0	0	2	45	58	0	236
06/04/2020	41	22	68	0	0	2	45	58	0	236
06/05/2020	41	22	68	0	0	2	45	58	0	236

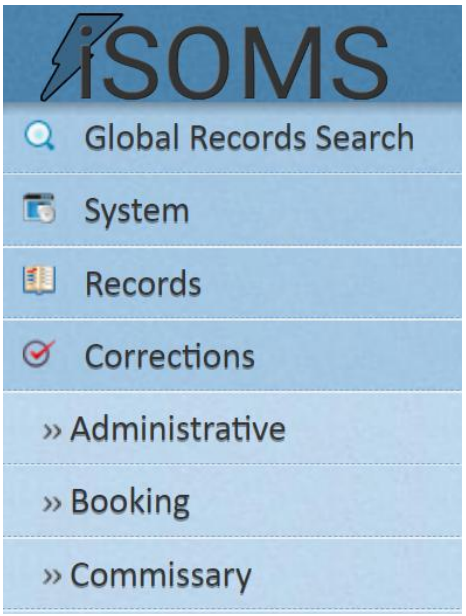
Classifying Inmates

Begin on the iSOMS home screen.



Navigate to:

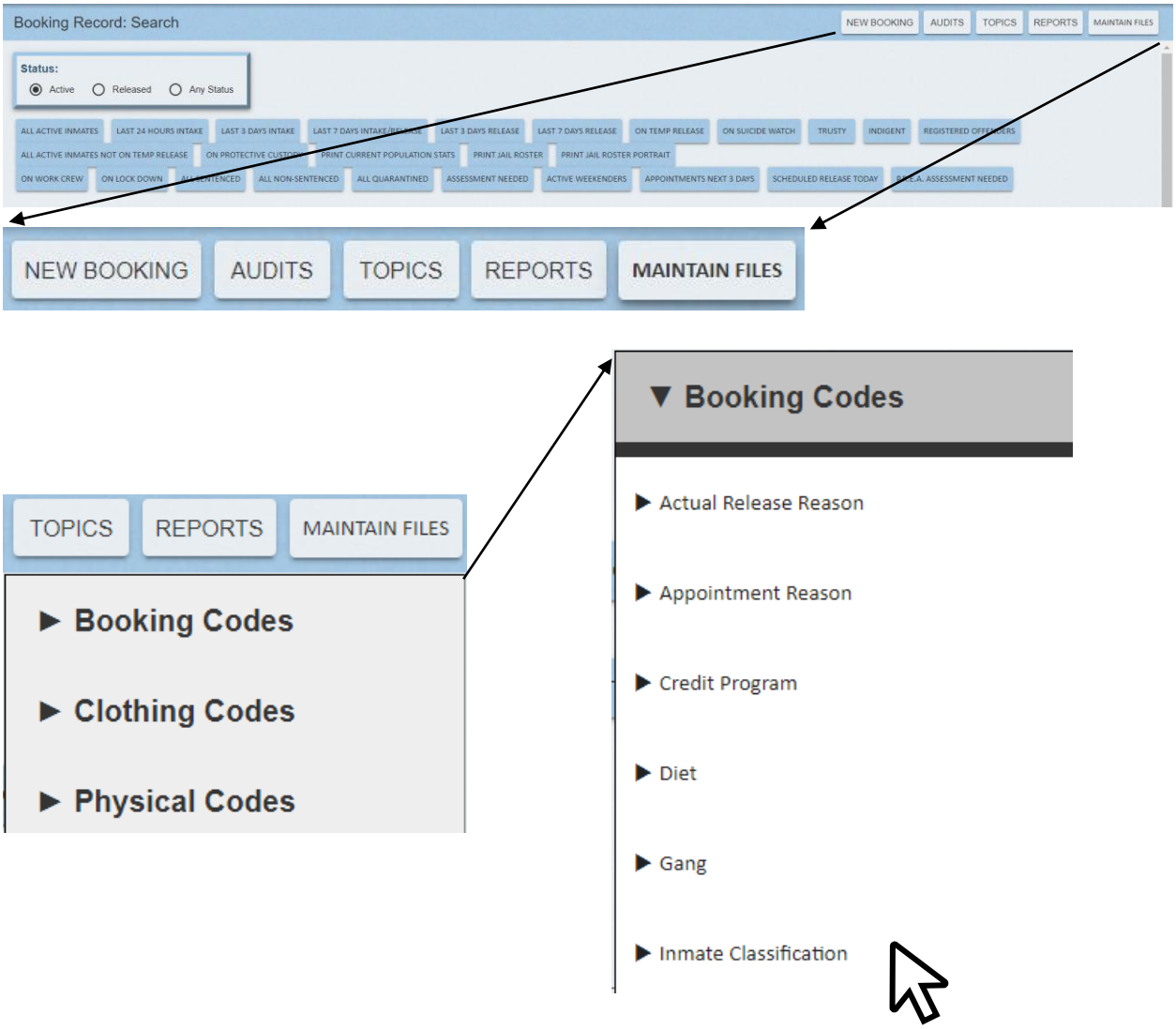
Corrections → Booking → Intake/Booking Records





In the booking module in iSOMS, click on:

Maintain Files → Booking Codes → Inmate Classification



Search Criteria ►

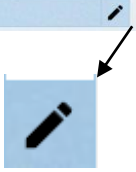
Search Results

8 Records

EXPORT GRID TO FILE

Code	NCIC	IBR	Description	Entry Date	Entry By	In-Active	Agency	System Code
CM			CONVICTED MISD	09/30/2019 20:59	M & M Micro Systems, Inc.,		BCSO	NO
OT			OTHER	09/30/2019 20:59	M & M Micro Systems, Inc.,		BCSO	NO
PV			PAROLE VIO	09/30/2019 20:59	M & M Micro Systems, Inc.,		BCSO	NO
PF			PRETRIAL FELON	09/30/2019 20:59	M & M Micro Systems, Inc.,		BCSO	NO
PM			PRETRIAL MISDEMEANANT	09/30/2019 20:59	M & M Micro Systems, Inc.,		BCSO	NO
SF			SENTENCED < 1 YEAR	09/30/2019 20:59	M & M Micro Systems, Inc.,		BCSO	NO
SM			SENTENCED > 1 YEAR	09/30/2019 20:59	M & M Micro Systems, Inc.,		BCSO	NO
TD			TENN DEPT OF CORRECTIONS	09/30/2019 20:59	M & M Micro Systems, Inc.,		BCSO	NO

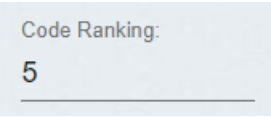
Edit each of the codes in your list and put in the Code Ranking that matches the column on the report that this inmate classification would go into. Valid answers are 1-6, and anything else should be put into column 7 (“other”).



To edit codes, click on the pencil icon at the far right of the field for the item you are completing.

Edit the **Code Ranking** field:





Add the proper code ranking here.

CODE KEY REMINDER

1 = DOC
2 = Less than 1 year
3 = 1 year and over
4 = State/Local Parole
5 = Convicted Misdemeanant
6 = Pre-Trial Misdemeanants & Felons
7 = All others (invalid for this report)

Inmate Evaluation

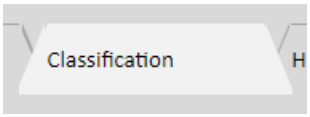
You need to do the inmate evaluation for the Facility Report.

Under each inmate's booking record, find and enter info into the following fields:

- Intake Date
- Release Date

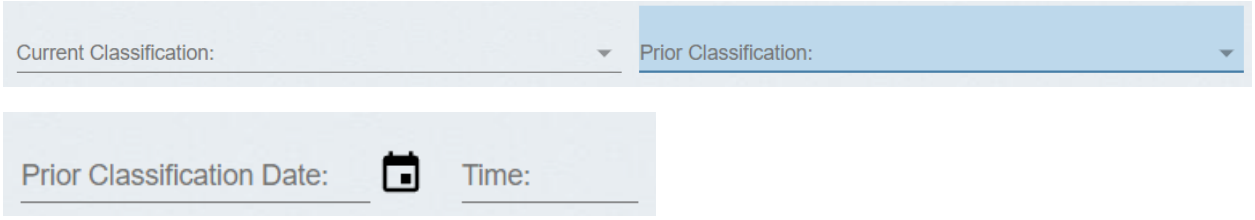


After this, under the tabs, find the Classification tab:



Edit the following fields:

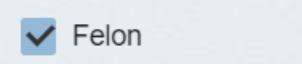
- Current Inmate classification
- Prior Inmate Classification Date
- Prior Inmate Classification



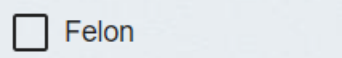
Be aware of the following checkboxes:

Felon:

This relates to the Pre-Trial column.

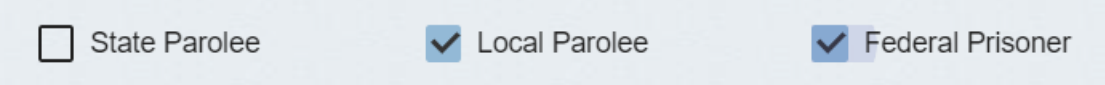


If this box is checked, the inmate will be classified as a felon.



If this box is NOT checked, the inmate will be classified as a Misdemeanant.

State Parolee / Local Parolee:



If the inmate's classification would put them in the Parole Violator Column on the report, iSOMS uses the State/Local to put in the correct sub-column.

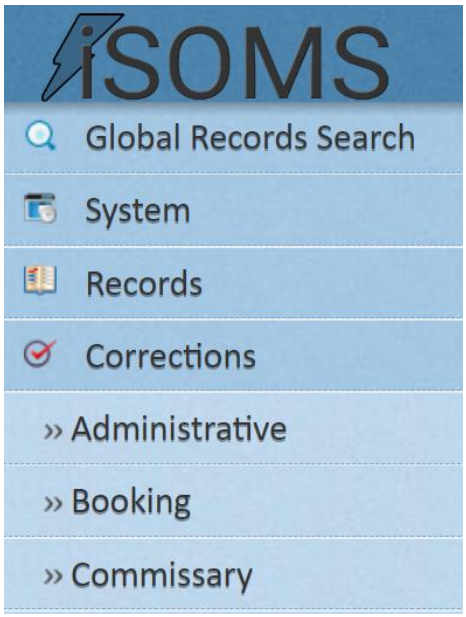
If you check Local, they will be in the Local Column. The default is that they are a State Parole Violator.

Printing the Report

To navigate to Jail Reporting begin on the iSOMS home screen.

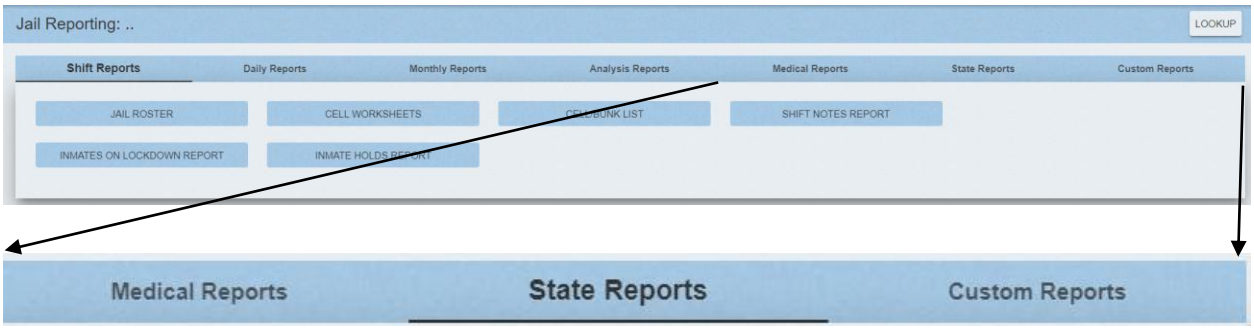
Navigate to:

Corrections → Booking → Jail Reporting

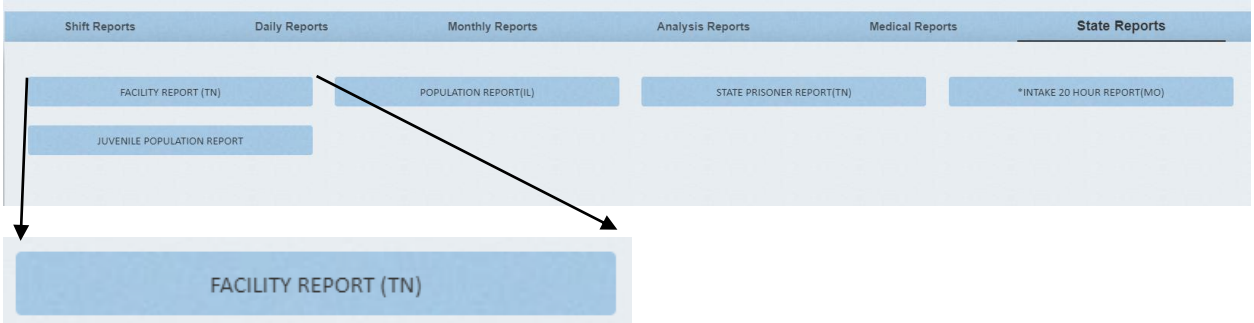




Near the far right, click on the **State Reports** tab button.

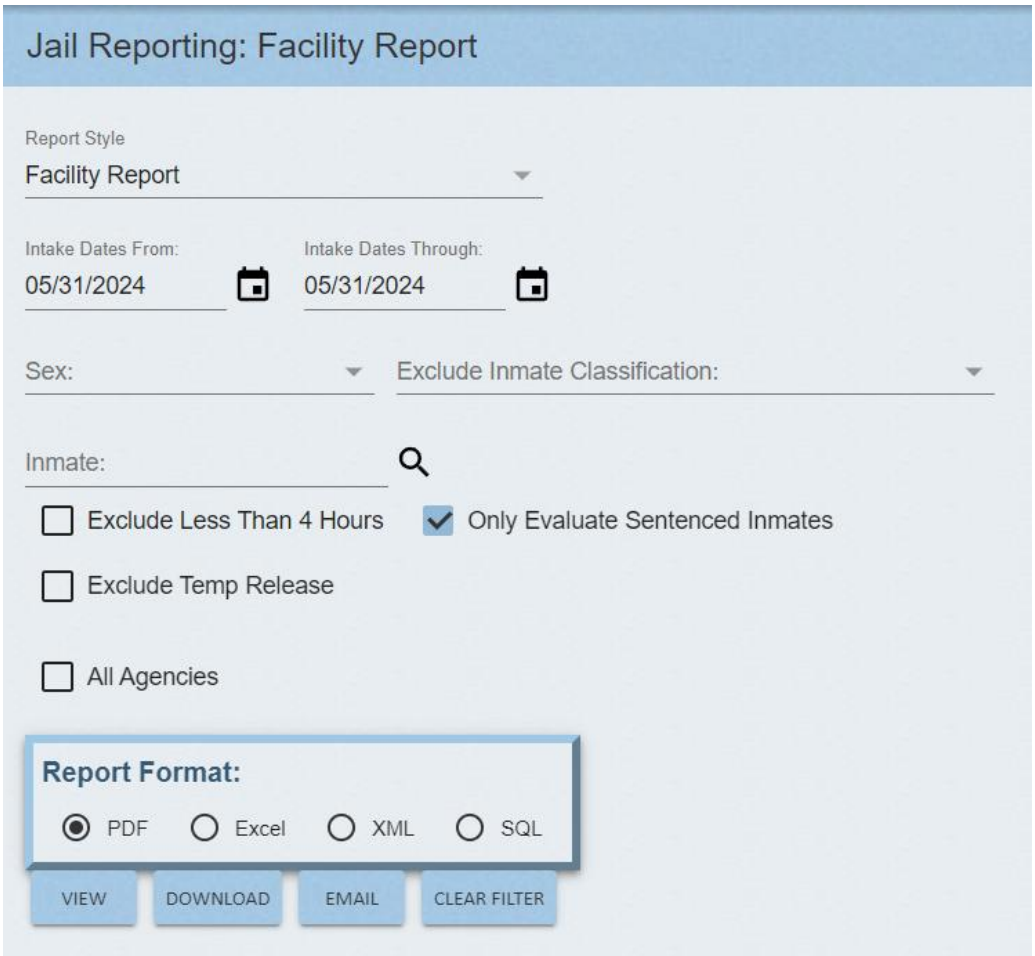


Then click the **Facility Report (TN)** button:

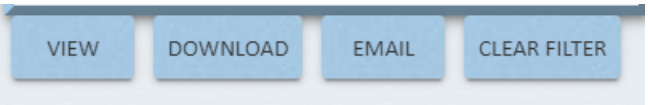


Enter the date range you are running. (**NOTE**: Dates are mandatory!)

Other fields are optional ways to filter.



At the bottom of the screen, you can choose to **View, Download, or Email** the report.



Sample Report

Your Agency X

Department Facility Report

Dates From 04/01/2024 Through 05/31/2024

Page 1 of 2

Date	DOC	Less Than 1 Year	1 Year and Over	Parole Local	Parole State	Convicted Mis	PreTrial Misd	PreTrial Felon	Other	Total
04/01/2024	36	19	54	0	0	2	4	3	10	128
04/02/2024	36	19	54	0	0	2	4	3	10	128
04/03/2024	36	19	54	0	0	2	4	3	10	128
04/04/2024	36	19	54	0	0	2	4	3	10	128
04/05/2024	36	19	54	0	0	2	4	3	10	128
04/06/2024	36	19	54	0	0	2	4	3	10	128
04/07/2024	36	19	54	0	0	2	4	3	10	128
04/08/2024	36	19	54	0	0	2	4	3	10	128
04/09/2024	36	19	54	0	0	2	4	3	10	128
04/10/2024	36	19	54	0	0	2	4	3	10	128
04/11/2024	36	19	54	0	0	2	4	3	10	128
04/12/2024	36	19	54	0	0	2	4	3	10	128

Method

The inmates evaluated are:

All Current Inmates + All Intakes during the Date Range + All Releases

during the Date range. By default, if any information is invalid, the inmate will be counted in

“Other” Column.

iSOMS loops through dates from the start date and through the end date provided.

Example Report Date Range: 06/01/2024 -> 06/31/2024

Code Rank

For any inmate being evaluated, if the Reporting Code Rank you setup for them is less than 1 or greater than 7, iSOMS will NOT use it. Instead, it will default that entire inmate should be computed in the “**OTHER**” column.

Intake and Release Date

If the release date of the inmate is less than (before) the end date being evaluated, the inmate will be skipped for that date.

Example:

Say the Inmate Intake Date is 01/01/2024, and their Release Date is 06/05/2024.

iSOMS would process the inmate and be counted on the report **for 06/01 -> 06/04** (but not counted for the release date or the rest of the reporting period.)

No Classification

If the inmate being evaluated does not have an Inmate Classification, iSOMS will use the

“Other” column.

Prior Classification and Prior Classification Date

If the inmate has Prior Classification Date and Prior Classification assigned:

If the Prior Classification Date is less than the Date being evaluated, iSOMS will use that classification for the report. Otherwise, it will use the Current Classification.

Example:

If the inmate has a Prior Classification Date of 06/10, a Prior Classification of Pre-Trial, and

Current Class Convicted of Misdemeanant, then:

When the Date Being Evaluated is 06/09, iSOMS will use *Pre-Trial.*

When the Date Being Evaluated is 06/10 → 06/30, iSOMS will use *Convicted Misdemeanant.*

Parole Violator

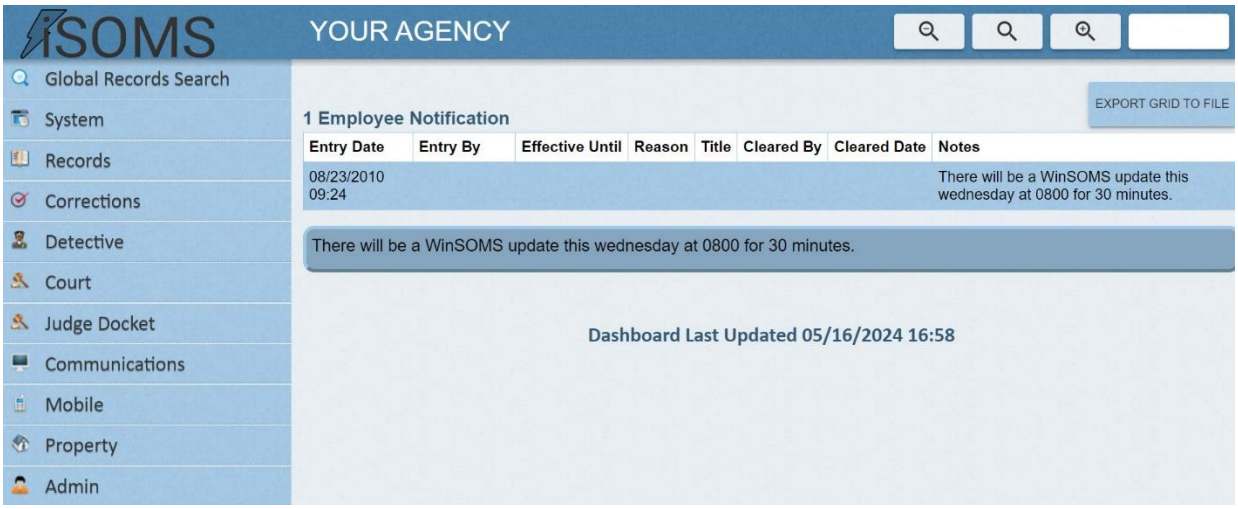
If the Report Rank = 4 (that is, the inmate is classified as a Parole Violator,) then iSOMS will evaluate the State Parolee and Local Parolee checkboxes to determine column they go in.

Shift Notes

Searching Shift Notes

The **Shift Notes** section of iSOMS allows you to quickly view relevant notes from shifts over a certain range of dates. You can use this to quickly get and share information on what has happened on shifts so your department and agency can stay coordinated.

To view Shift Notes, begin on the iSOMS home screen:



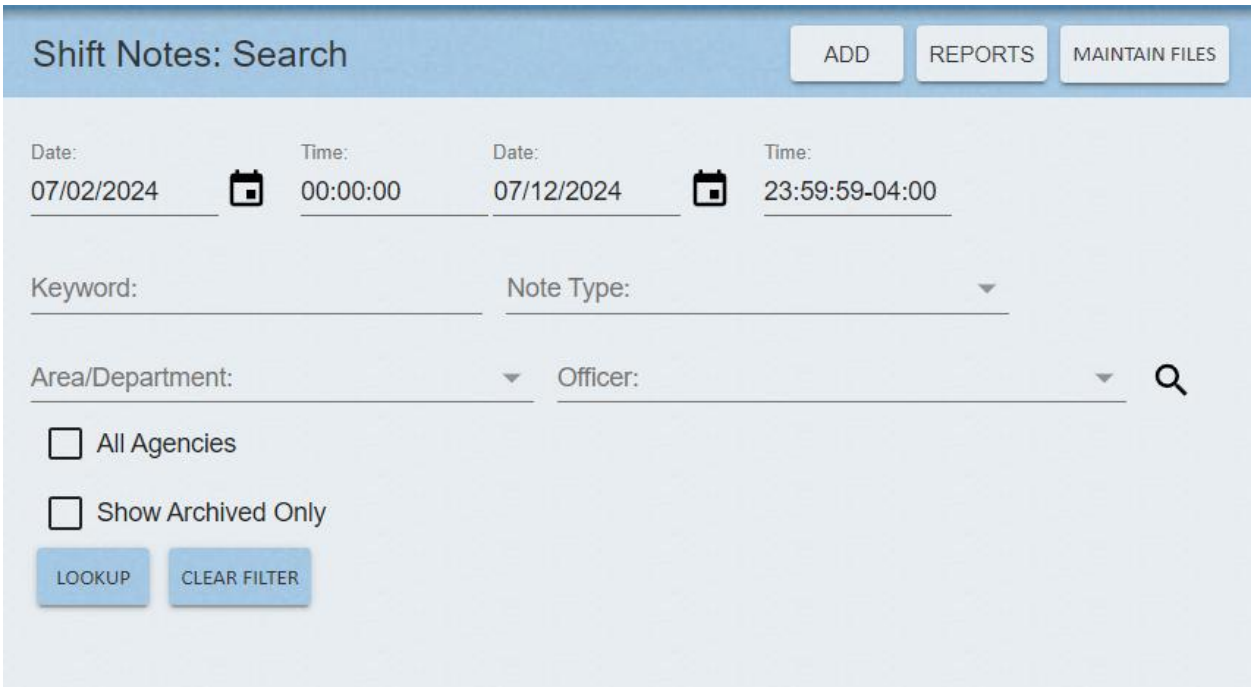
Navigate to:

Corrections → Booking → Shift Notes

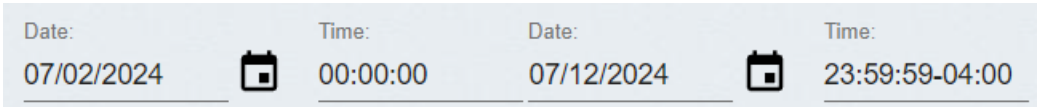




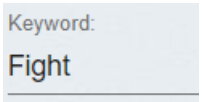
This will open the **Shift Notes Search** screen. This screen allows you to search specific dates and types of shift notes. You will use the different fields to narrow your search for shift notes.

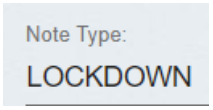


The two **Date / Time** fields allow you to set a start and end date for the search. It defaults to the past 10 days.

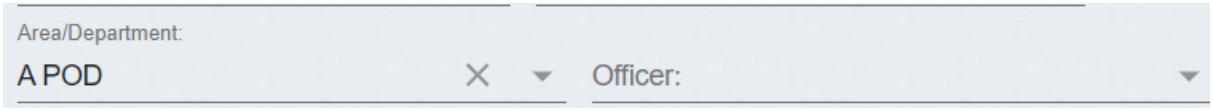


Use the **Keyword** field to search for specific words in notes. You can use the **Note Type** dropdown to filter for a specific type of note, such as **LOCKDOWN** or **CELL CHECK**.

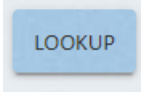




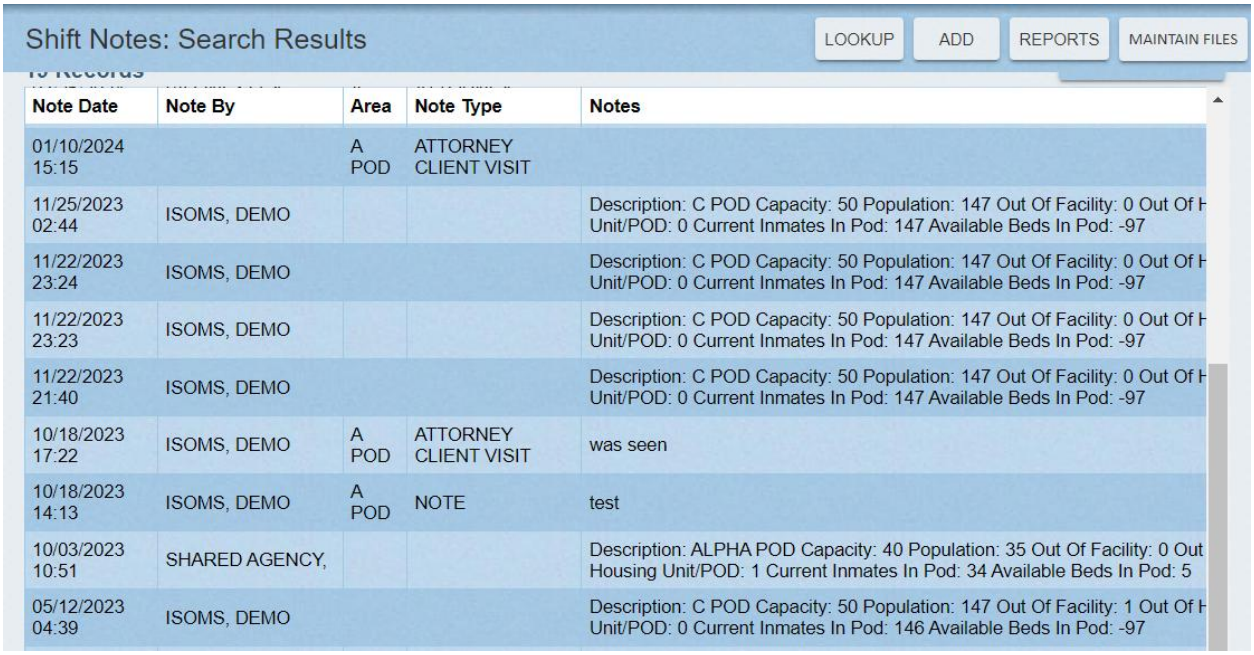
Area/Department lets you filter by specific areas of your agency, while **Officer** allows you to search for a specific shift note author.



When finished, click **Lookup** to search for the chosen filters:



You will be able to view the shift notes for the specified period. Double-click on a table-entry if you would like to view it.



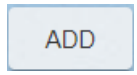
Note Date	Note By	Area	Note Type	Notes
01/10/2024 15:15		A POD	ATTORNEY CLIENT VISIT	
11/25/2023 02:44	ISOMS, DEMO			Description: C POD Capacity: 50 Population: 147 Out Of Facility: 0 Out Of H Unit/POD: 0 Current Inmates In Pod: 147 Available Beds In Pod: -97
11/22/2023 23:24	ISOMS, DEMO			Description: C POD Capacity: 50 Population: 147 Out Of Facility: 0 Out Of H Unit/POD: 0 Current Inmates In Pod: 147 Available Beds In Pod: -97
11/22/2023 23:23	ISOMS, DEMO			Description: C POD Capacity: 50 Population: 147 Out Of Facility: 0 Out Of H Unit/POD: 0 Current Inmates In Pod: 147 Available Beds In Pod: -97
11/22/2023 21:40	ISOMS, DEMO			Description: C POD Capacity: 50 Population: 147 Out Of Facility: 0 Out Of H Unit/POD: 0 Current Inmates In Pod: 147 Available Beds In Pod: -97
10/18/2023 17:22	ISOMS, DEMO	A POD	ATTORNEY CLIENT VISIT	was seen
10/18/2023 14:13	ISOMS, DEMO	A POD	NOTE	test
10/03/2023 10:51	SHARED AGENCY,			Description: ALPHA POD Capacity: 40 Population: 35 Out Of Facility: 0 Out Housing Unit/POD: 1 Current Inmates In Pod: 34 Available Beds In Pod: 5
05/12/2023 04:39	ISOMS, DEMO			Description: C POD Capacity: 50 Population: 147 Out Of Facility: 1 Out Of H Unit/POD: 0 Current Inmates In Pod: 146 Available Beds In Pod: -97

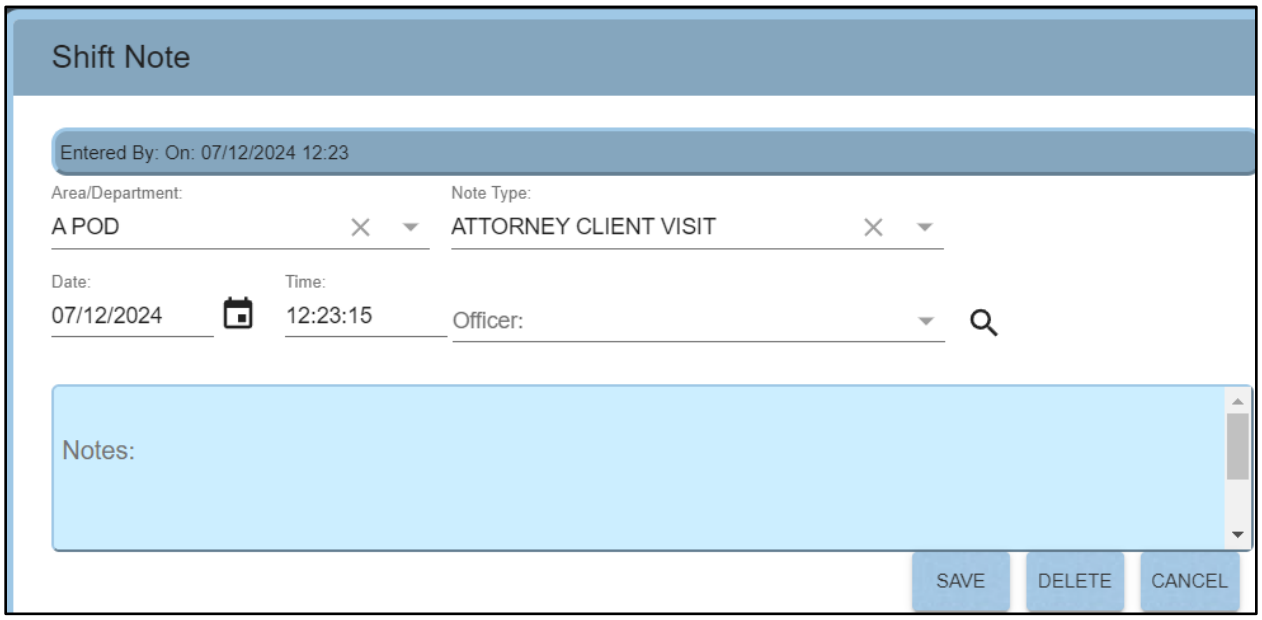
iSOMS will automatically add some shift notes as you enter other information in different parts of iSOMS. You can see:

- The Date of the Note
- The Person Who Added the Note
- The Area the Note Applies to
- The Note Type
- The Note

Adding Shift Notes

To add a new shift note, click the **ADD** button in the upper right of the screen.





Fill in the fields for the shift note:

Area/Department tells the relevant location for the note.



Note Type tells the category of the note for easy searching later.



You can change the **Date / Time** fields if necessary to make notes for previous time periods.

Your username will be entered into the **Officer** field when you add a new note.

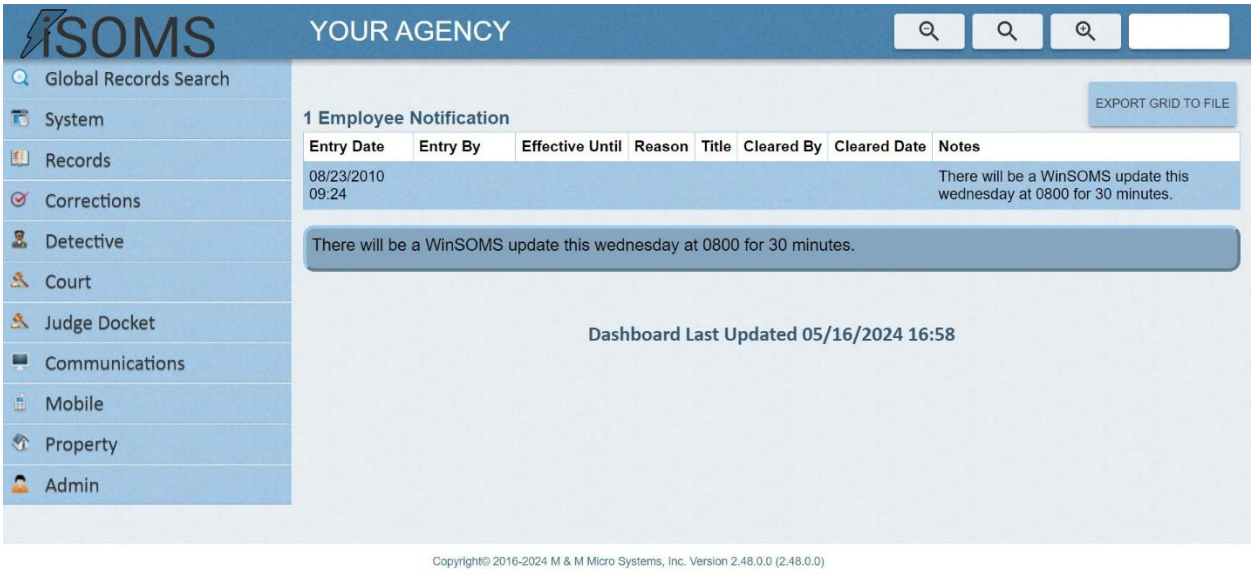
Finally, add the **notes** you need to add for the shift note.



Department Forms

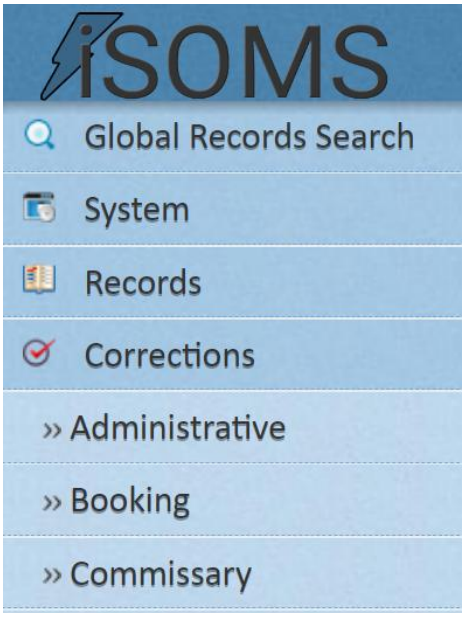
The **Department Forms** screen allows you to view the forms your agency has uploaded, like vehicle inspection forms, warrant forms, etc.

To view the Department Forms, begin on the iSOMS home screen:



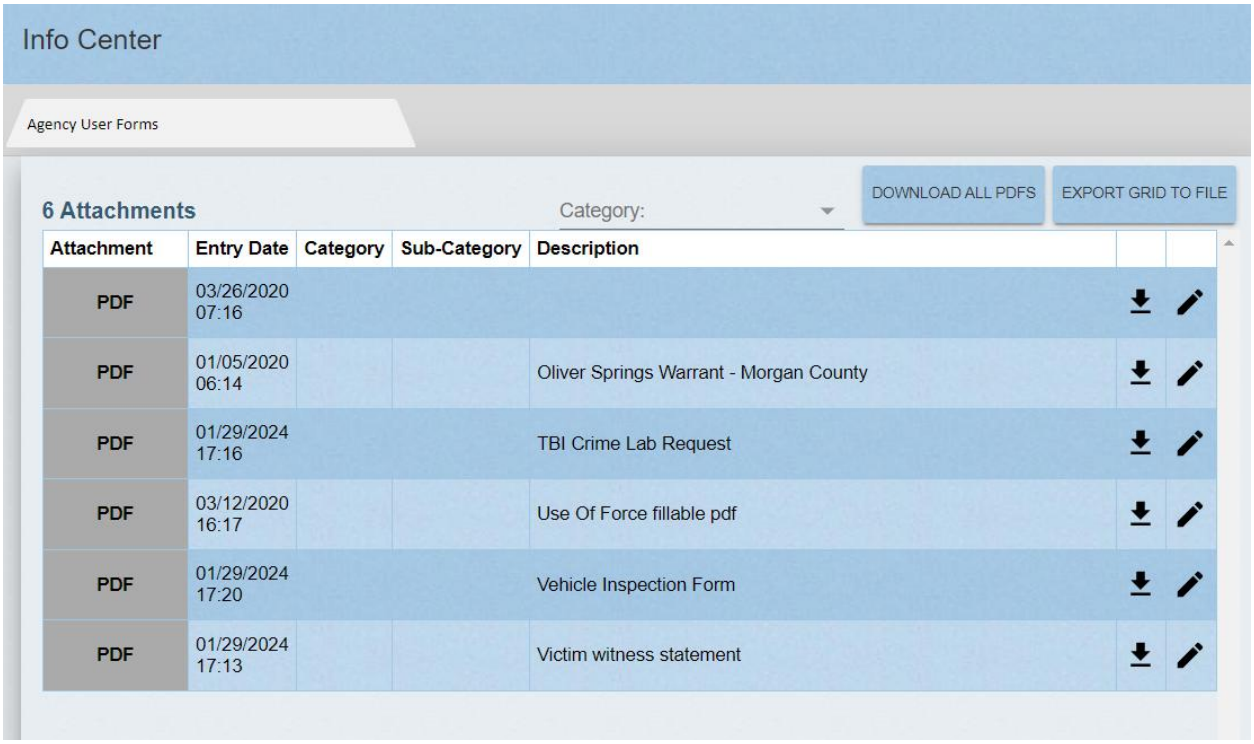
Navigate to:

Corrections → Booking → Department Forms





This will open the **Info Center** for department forms:



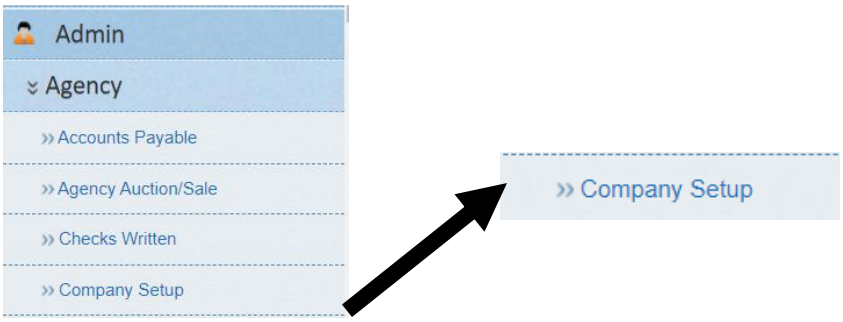
Here you can view the different forms that have been uploaded for your agency. If you would like to download a form to the computer for viewing or printing, click on the **download** icon ( ) to download it.

If you want to view the details about a specific form to edit the description or delete it, either double-click it or click on the **pencil** ( ) icon on the far right.

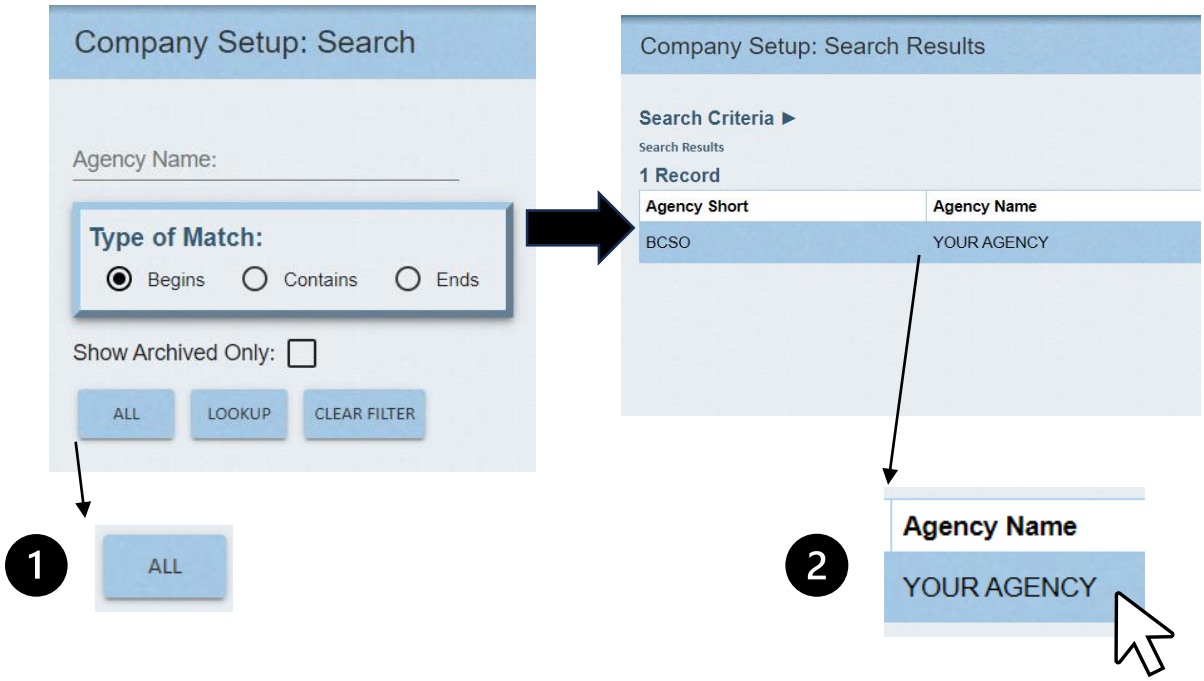
Adding Department Forms

To add department forms, navigate to:

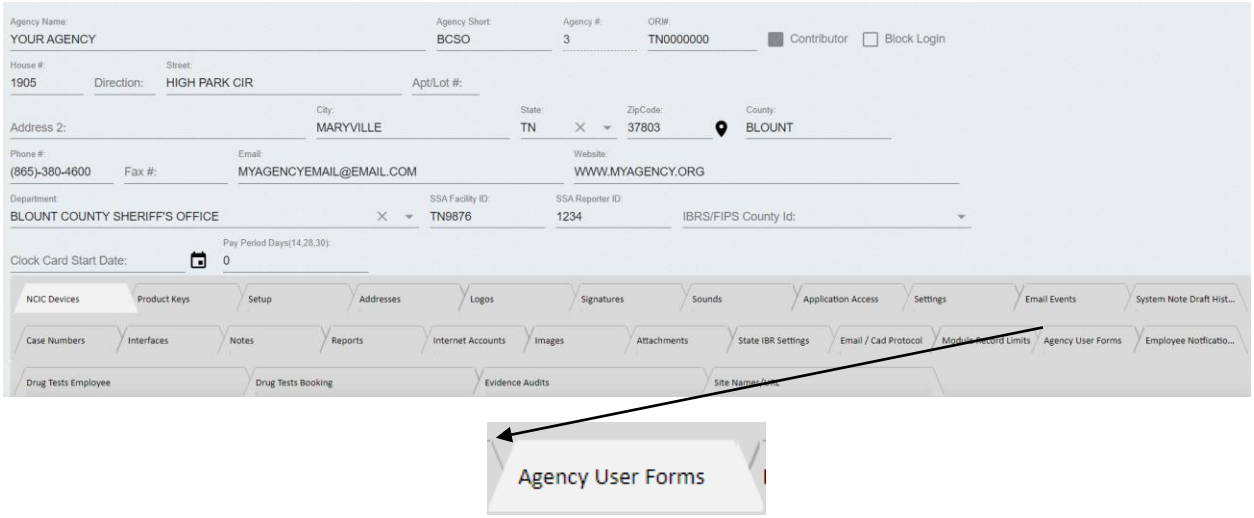
In the Home page, Choose **Admin → Agency → Company Setup**



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



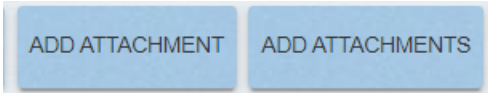
This will open the **Company Setup** screen. Find the *Agency User Forms* tab:

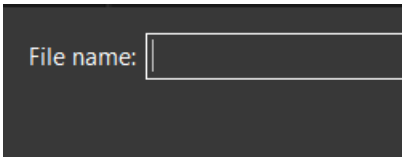


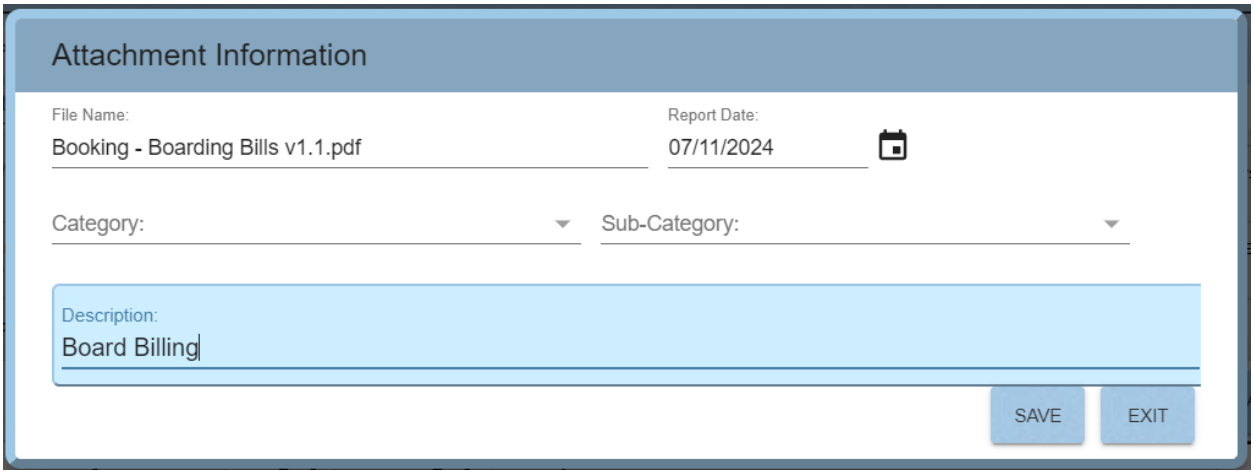
Here you will be able to see the current department forms and add new ones.



Click the **Add Attachment** button to add a new attachment, or (if you have the *System Tray Installer* on this computer) click **Add Attachments** to add multiple files at once. Navigate to files on the computer and add a description (and category if applicable).





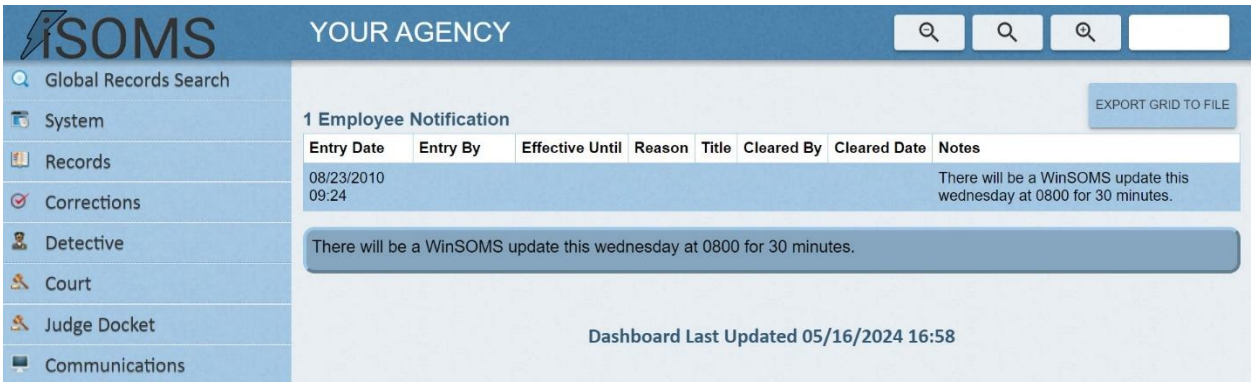


Extradition and Transport

Overview

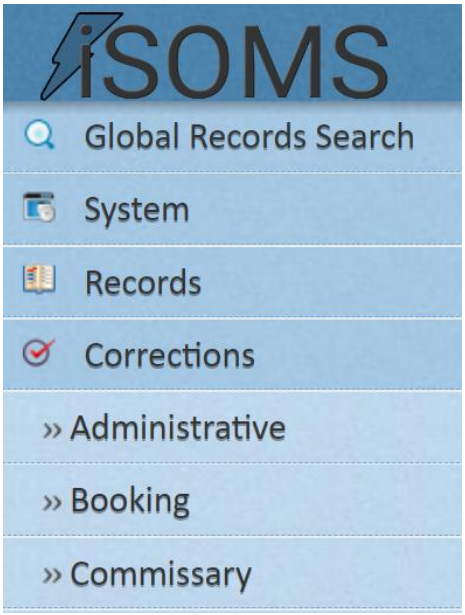
The **Extradition and Transport** section of iSOMS allows you to log inmate movements when the inmate is being extradited or transported to another facility or agency. You can track which inmates transported, destination, return info, and more. This section describes how to view current extraditions / transport records and how to add a new record.

To access the **Extradition and Transport** records, begin on the iSOMS home screen:



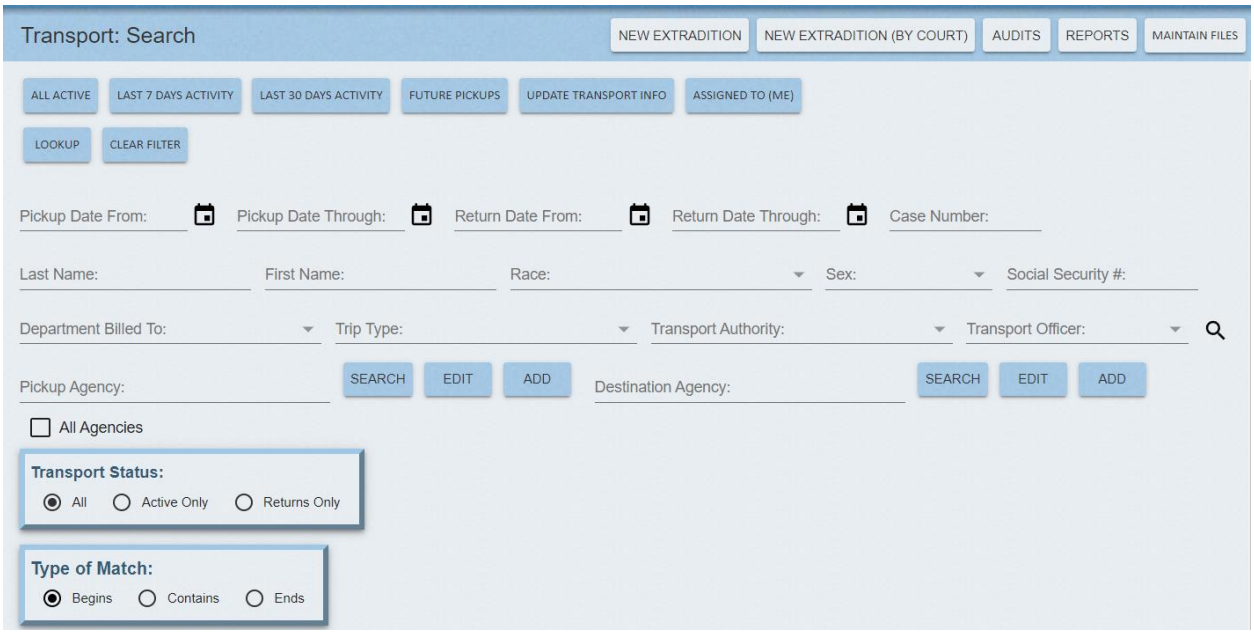
Navigate to:

Corrections → Booking → Extradition / Transport





This will open the **Transport Search** screen. Here you can enter search terms and filters to find previous records or add a new record.



Searching for Transport Records

The buttons across the top of the screen perform quick searches.

Quick Searches

The **All Active** button lists all active transport records that are stored in iSOMS.



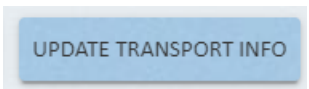
The **Last 7 / 30 Days Activity** buttons allow you to view recent records for transports or extraditions that have happened recently.



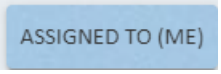
The **Future Pickups** button lets you find scheduled transportation upcoming.



Update Transport Info shows records that need to be updated with more information.



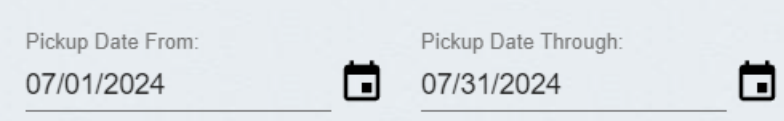
Assigned to Me shows all records assigned to the current user.



Field Explanations

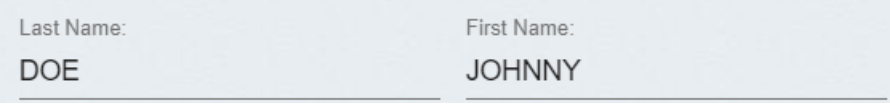
The rest of the fields allow you to do custom searches to filter for the records you need.

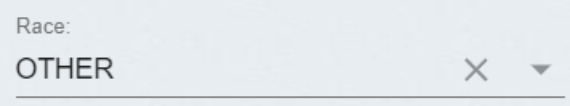
You can search for ranges of **Pickup and Return Dates**.





You can also search by identifying factors like **Name, Race, Sex,** and **SS #**.







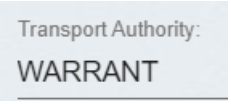
Department Billed To searches for the department financially responsible for the transport.



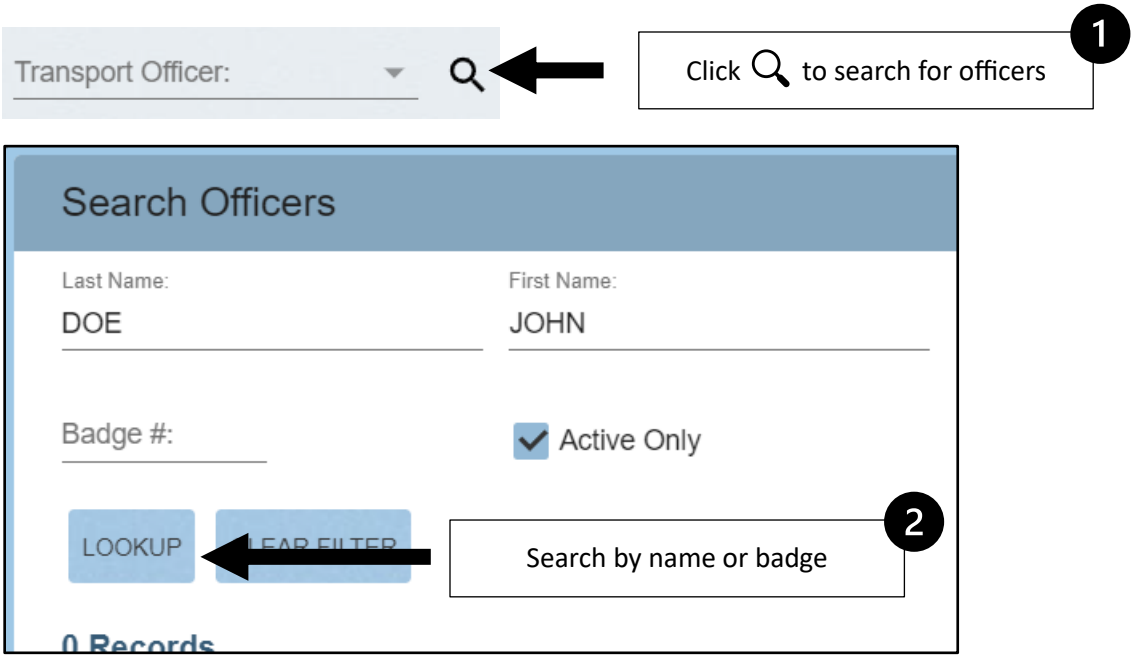
Trip Type is used to find specific transportation types such as criminal extraditions, mental health transportation, ICE, etc.



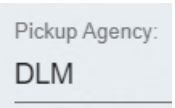
The **Transport Authority** button lets you search for records by the way they were authorized: through warrant, writ, commitment, etc.

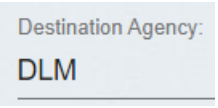


The **Transport Officer** field lets you search for records with specific officers assigned. To find one for your search, click the magnifying glass ( ) to the right of the field.

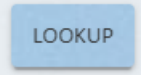


Pickup and **Destination Agency** lets you find records with certain pickup and destination agency/locations.

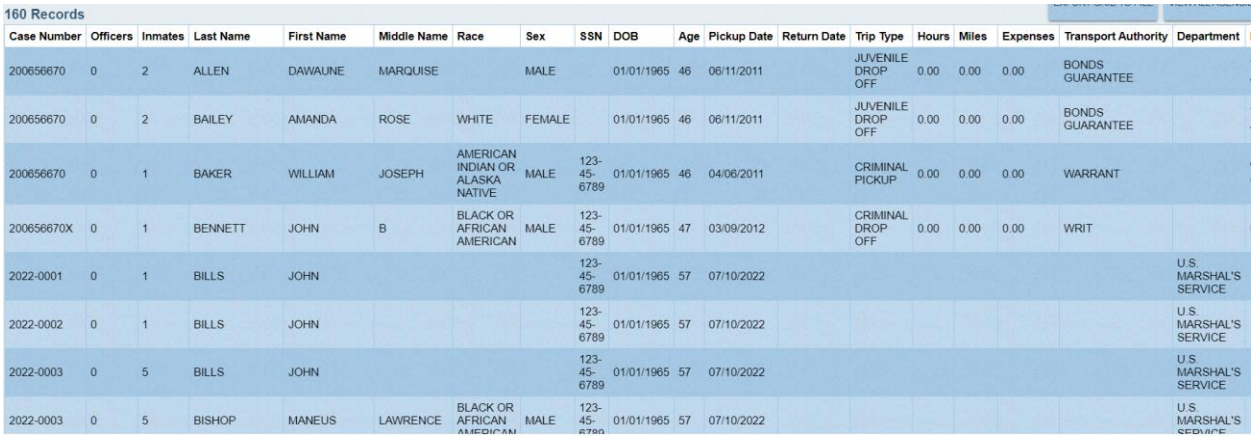




Click the **Lookup** button when you are satisfied with your search criteria and iSOMS will return your search results.



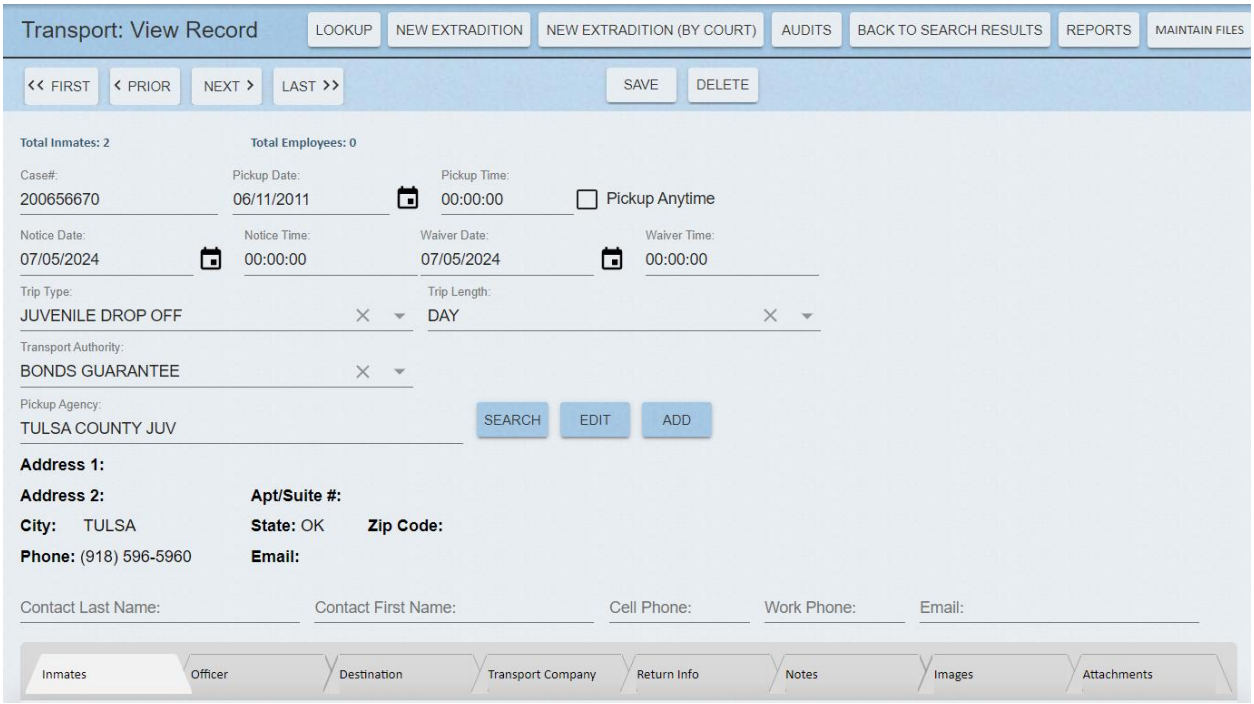
Example Search Results



160 Records

Case Number	Officers	Inmates	Last Name	First Name	Middle Name	Race	Sex	SSN	DOB	Age	Pickup Date	Return Date	Trip Type	Hours	Miles	Expenses	Transport Authority	Department
200656670	0	2	ALLEN	DAWAUNE	MARQUISE		MALE		01/01/1965	46	06/11/2011		JUVENILE DROP OFF	0.00	0.00	0.00	BONDS GUARANTEE	
200656670	0	2	BAILEY	AMANDA	ROSE	WHITE	FEMALE		01/01/1965	46	06/11/2011		JUVENILE DROP OFF	0.00	0.00	0.00	BONDS GUARANTEE	
200656670	0	1	BAKER	WILLIAM	JOSEPH	AMERICAN INDIAN OR ALASKA NATIVE	MALE	123-45-6789	01/01/1965	46	04/06/2011		CRIMINAL PICKUP	0.00	0.00	0.00	WARRANT	
200656670X	0	1	BENNETT	JOHN	B	BLACK OR AFRICAN AMERICAN	MALE	123-45-6789	01/01/1965	47	03/09/2012		CRIMINAL DROP OFF	0.00	0.00	0.00	WRIT	
2022-0001	0	1	BILLS	JOHN				123-45-6789	01/01/1965	57	07/10/2022							U.S. MARSHAL'S SERVICE
2022-0002	0	1	BILLS	JOHN				123-45-6789	01/01/1965	57	07/10/2022							U.S. MARSHAL'S SERVICE
2022-0003	0	5	BILLS	JOHN				123-45-6789	01/01/1965	57	07/10/2022							U.S. MARSHAL'S SERVICE
2022-0003	0	5	BISHOP	MANEUS	LAWRENCE	BLACK OR AFRICAN AMERICAN	MALE	123-45-6789	01/01/1965	57	07/10/2022							U.S. MARSHAL'S SERVICE

Here you can see limited relevant info to the transportations recorded. To view an entry in full, simply double click its entry in the table. This will open the record. The different fields and tabs will be discussed in the next section when filling in a new transport record is discussed in detail.

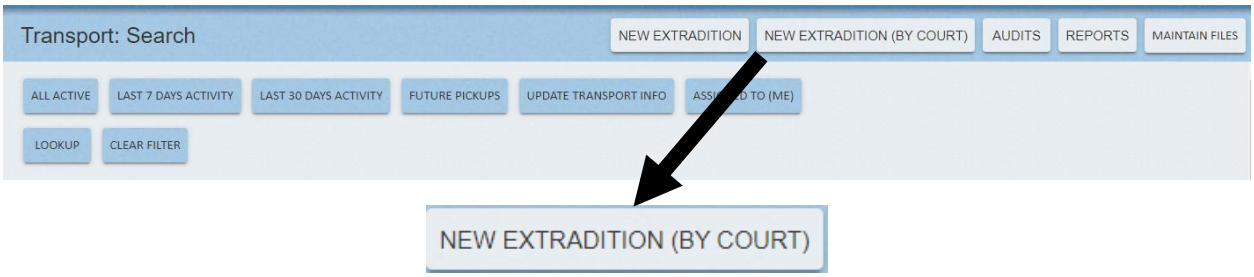


Adding a New Transport Record

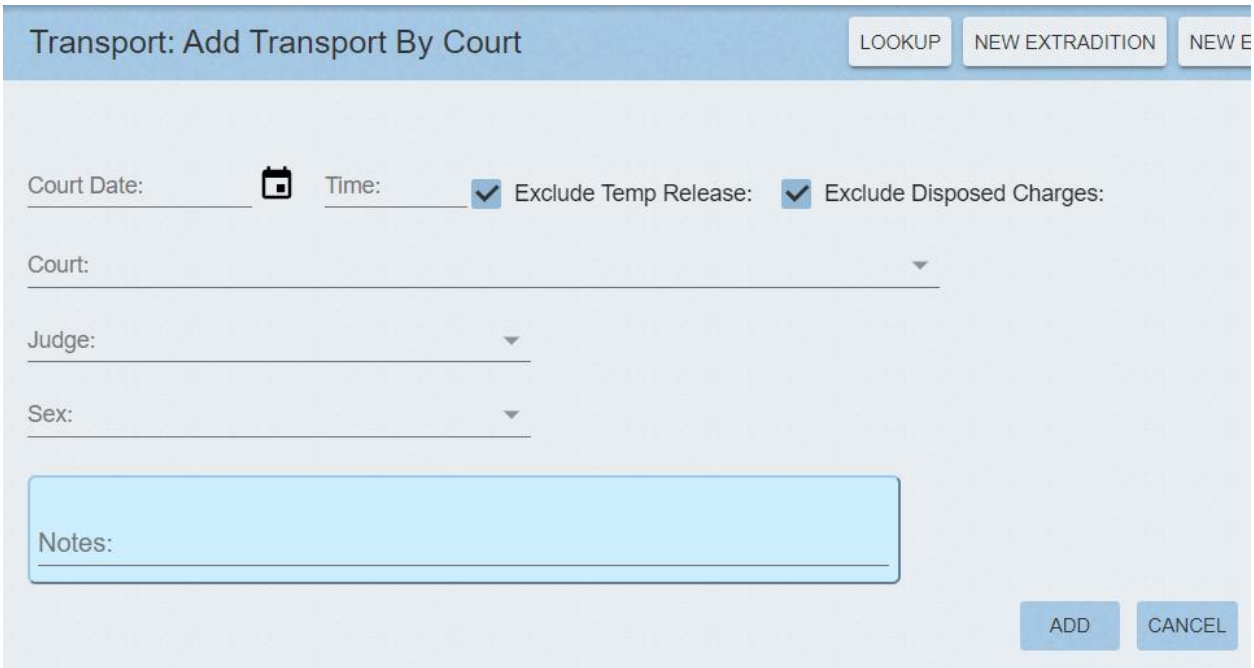
You have two options when adding a new extradition/transport: **New Extradition** and **New Extradition (by Court)**.

Extradition by Court

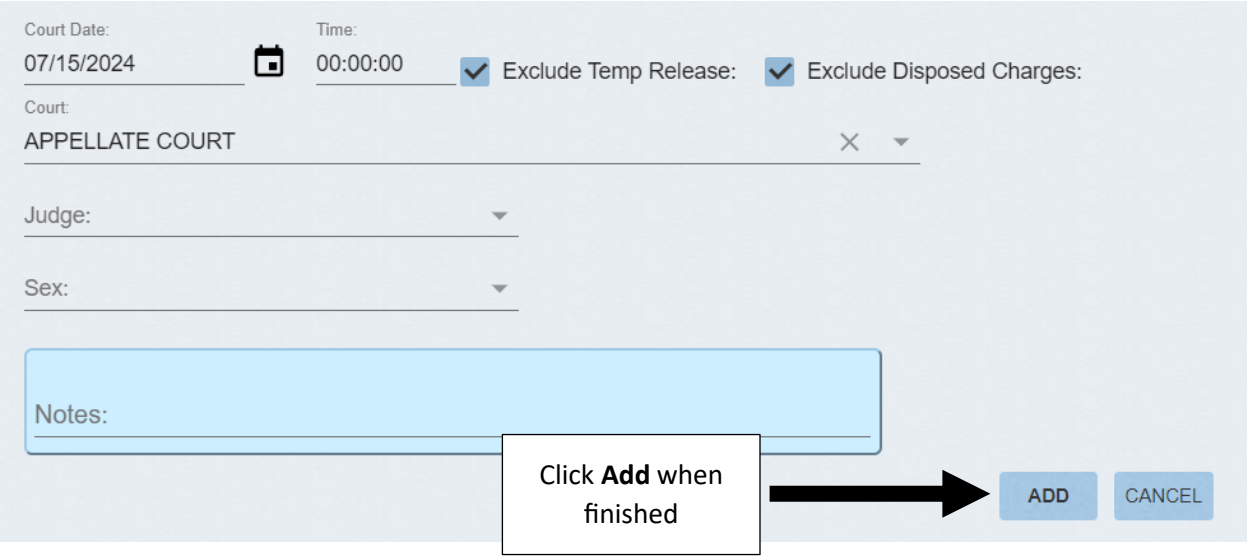
If you need to make an entry for an extradition due to a court case, click **New Extradition (by Court).**



This will open the **Transport: Add Transport by Court** screen:

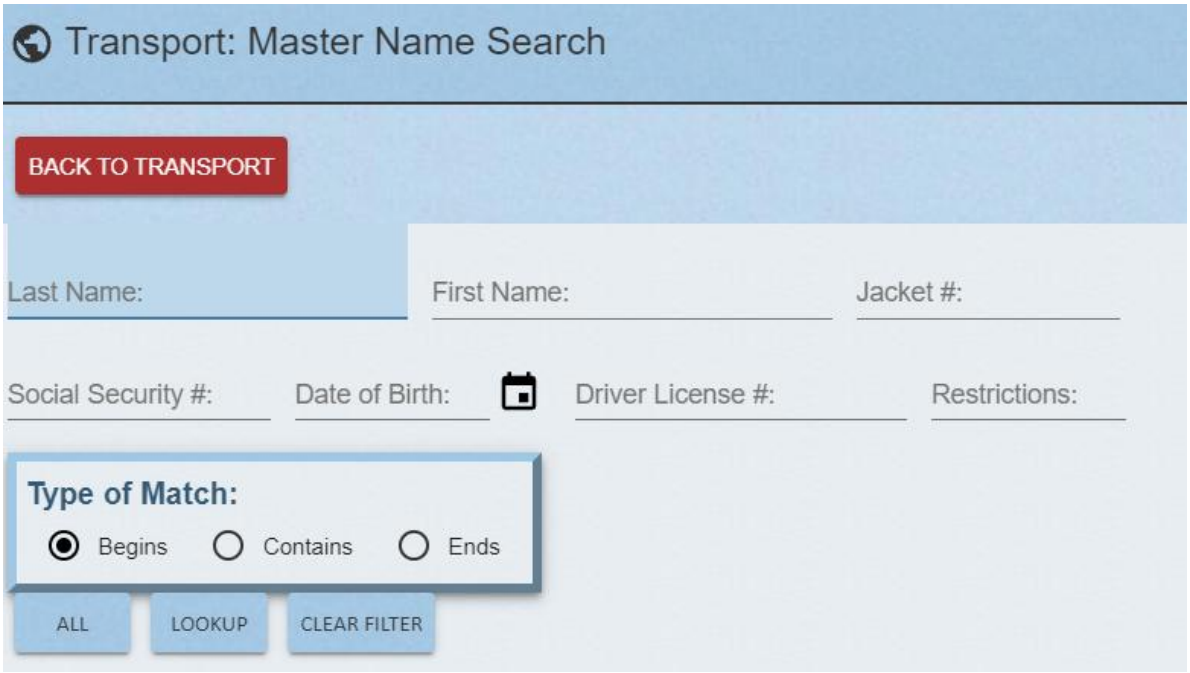


Add the **Court Date** and the appropriate **Court** at minimum. This **must** match a court date already in the records. **Add** to create the transport record.



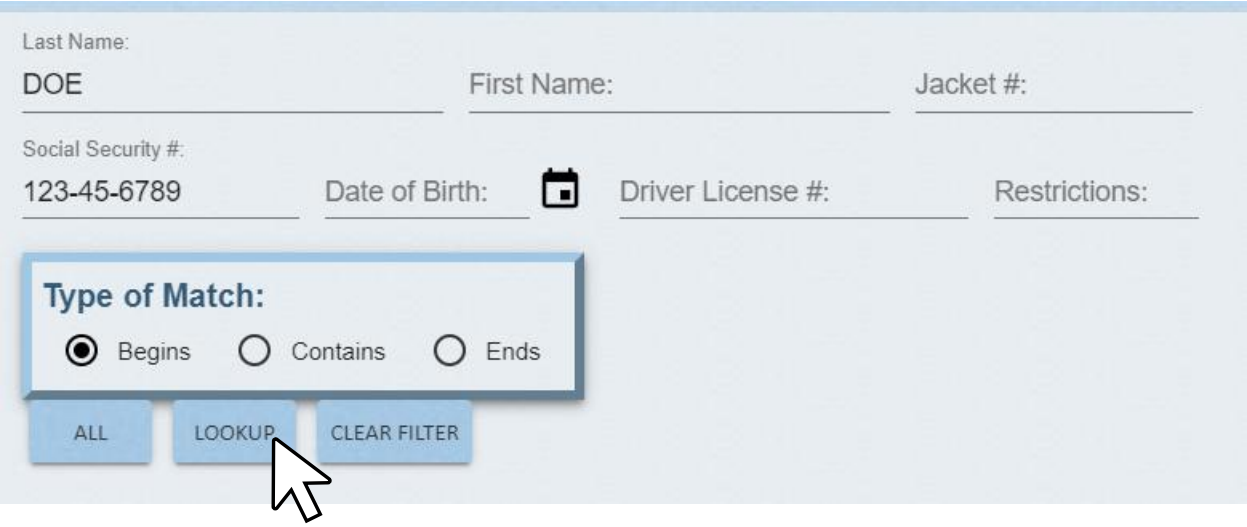
Extradition by Master Name

Using this method, you will make an extradition / transport record using the Master Name entry of the inmate being moved. If you need to add multiple inmates, you will be able to add more once the transport record is created.

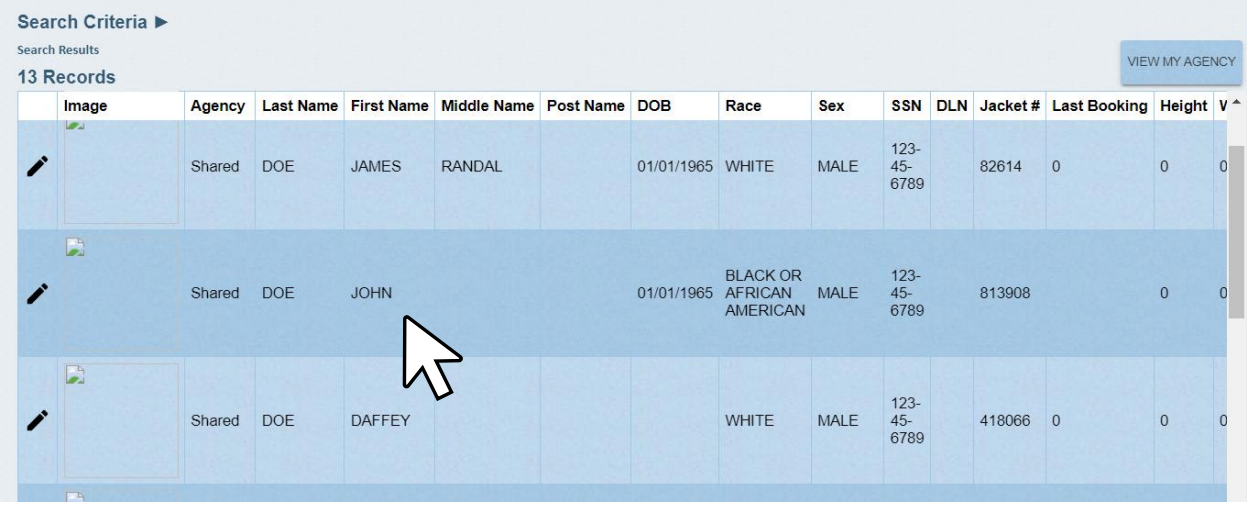


Search for the person for which you are creating a transport record. using *at least* two identifying pieces of information. You want to verify that the inmate matches with the Master Name. Most of the time, this person will have a Master Name because you are extraditing or transporting them, so they should have already been booked in through the Master Name system.

Click **LOOKUP** when you have the information you need.



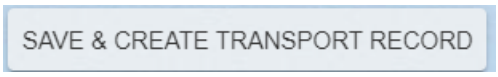
Double-click the appropriate Master Name from the results to open their record.



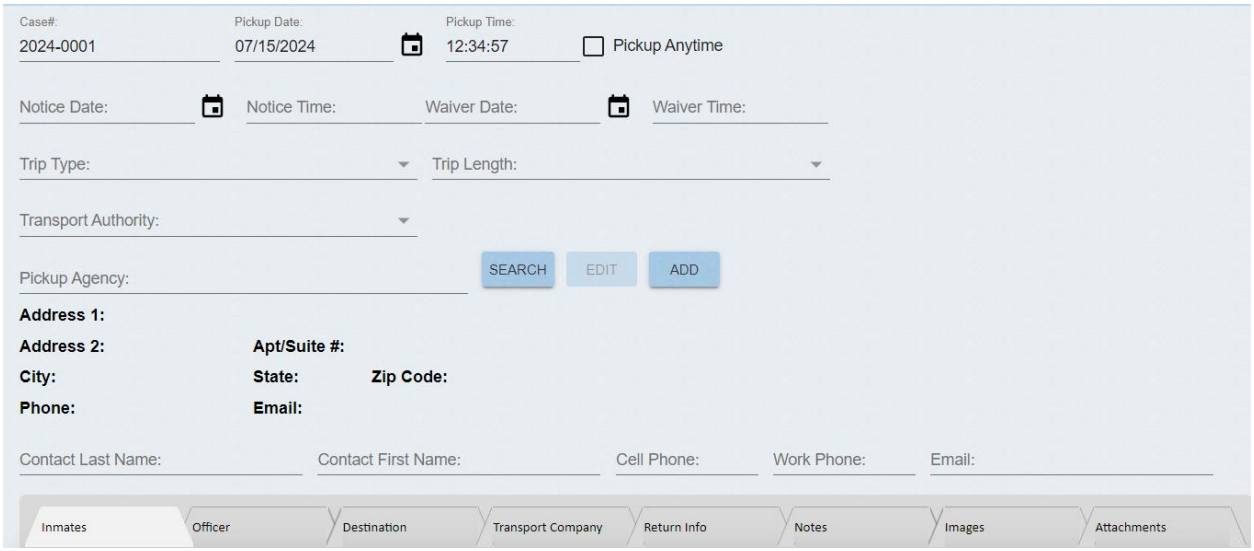
Verify the Master Name information is filled out correctly. If you need additional information on filling out a Master Name, see *Creating A New Master Name* on page 52.



Click **Save & Create Transport Record** when you are finished.

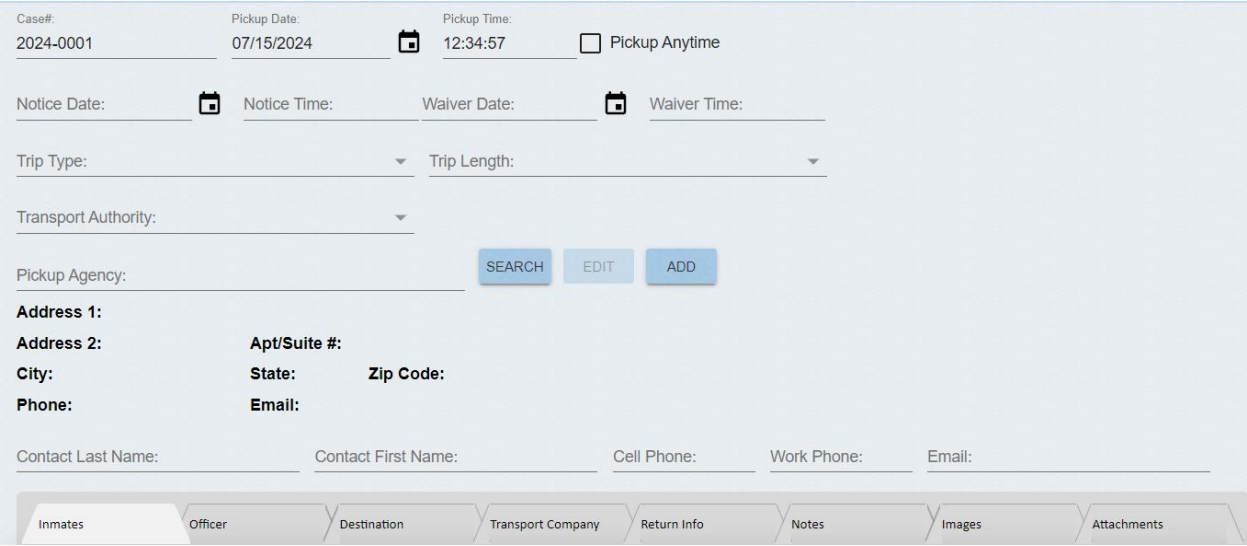


This will create and open the new record.



Filling in the Transport Record

At this point, you should have a mostly blank record.



There are two main sections to the transport record:

1) The fields where the main trip info is stored.
2) The tabs where additional information is stored.

Completing the Fields

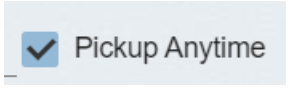
First, you need to fill out the trip information, such as trip length, pickup date, etc. Fill out the following fields:

iSOMS will add the **Case #** automatically based on how many transportation records have been added this year. You can change it if necessary.



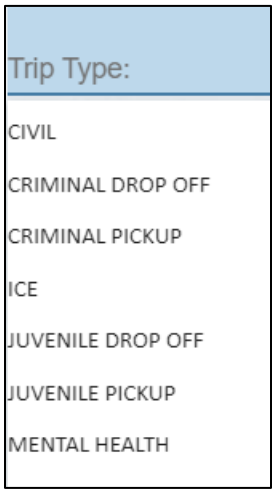
The **Pickup Date & Time** are automatically set to the current date and time. Change them to the proper date / time, or, if the inmates can be picked up anytime, select the **Pickup Anytime** checkbox instead.



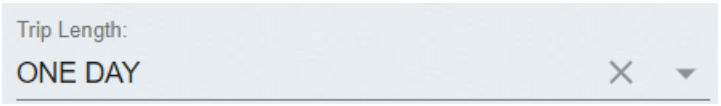


Add a **Notice Date & Time** and / or a **Waiver Date & Time** if applicable.

Select the **Trip Type**, such as Civil, Criminal Pickup, or Mental Health, from the dropdown menu.



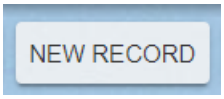
Select the **Trip Length** from the dropdown menu as well. If the length you need isn't available, you can have a Super User use *Maintain Files* to add a new option.



How to add a new option:

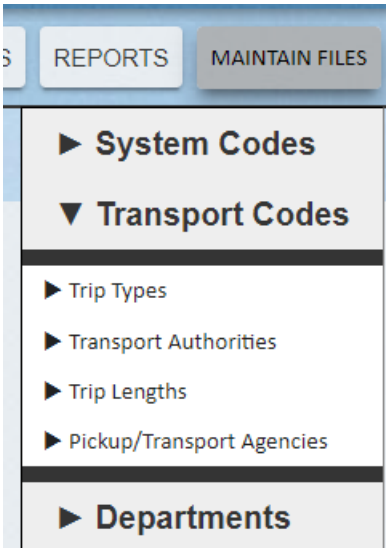
Click Maintain Files → Transport Codes → Trip Lengths

Click New Record



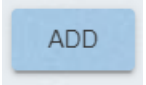
Add a code and description, add, and save.



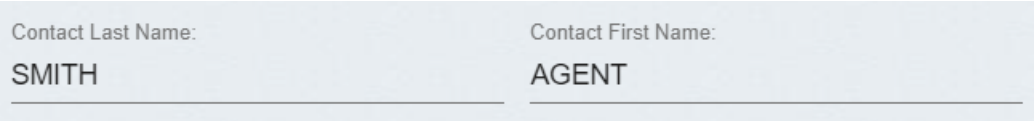


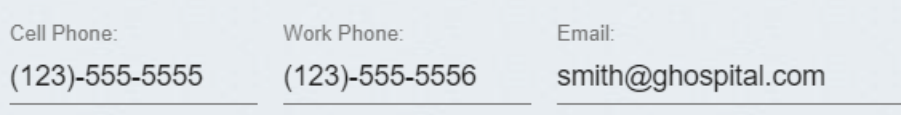
Type in the **Pickup Agency** field to search for the name of the agency or service picking up the inmates. If you need to add a new agency, click **ADD** to the right of the field.



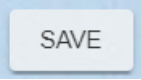


You will need to add in the **Contact** information for the person in charge of the transportation. Add their name and contact info.



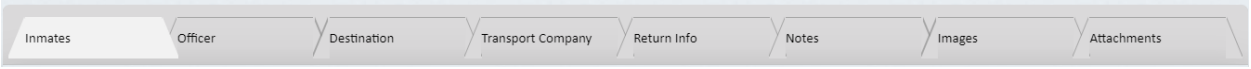


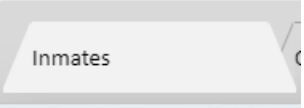
At this point, you will have the fields filled in. Click **Save** at the top of the screen to prevent losing your entries so far.



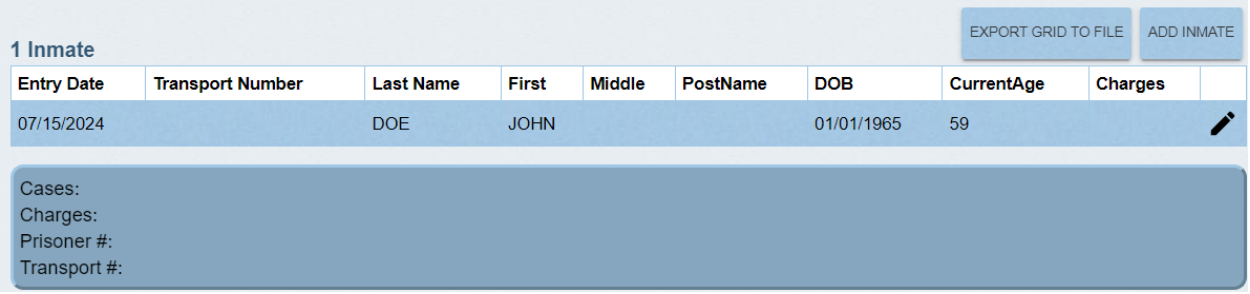
Filling in the Tabs

When the fields are completed, you can move on to the tabs along the bottom of the screen. The first five tabs usually need to be filled out, and the last three (*Notes, Images, Attachments*) are available should you need them.



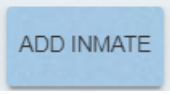


The **Inmates** tab stores which inmates are being relocated. You can edit the information stored *in this record* if you double-click an entry or click on the pencil ( ) icon.

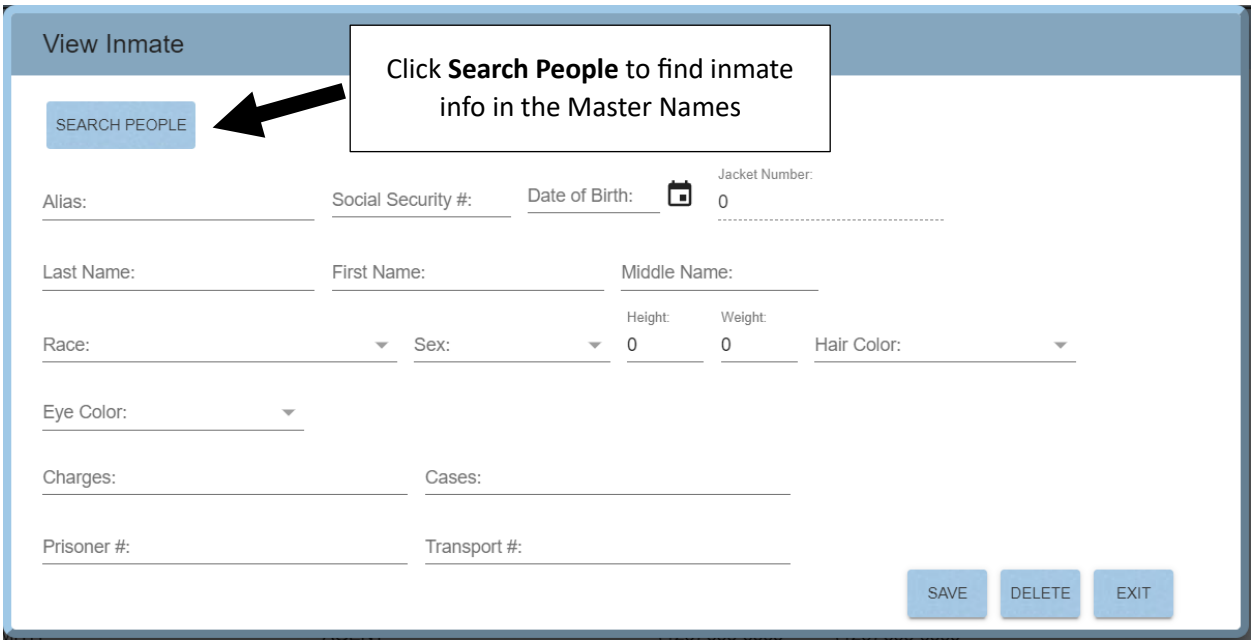


Adding a New Inmate

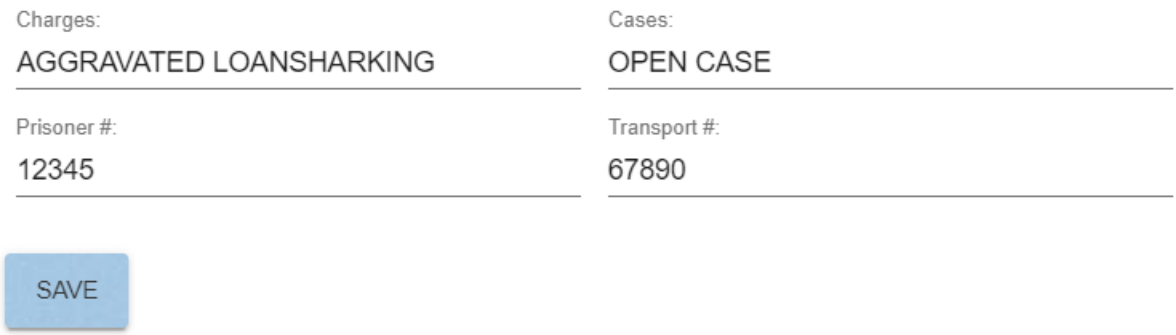
You should already have one inmate entered if you created this entry using a Master Name, but if additional inmates need to be added, click **Add Inmate** to record that here.

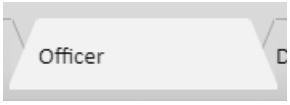


You can add the information manually or simply click **Search People** to find the inmate's details in the Master Name database.

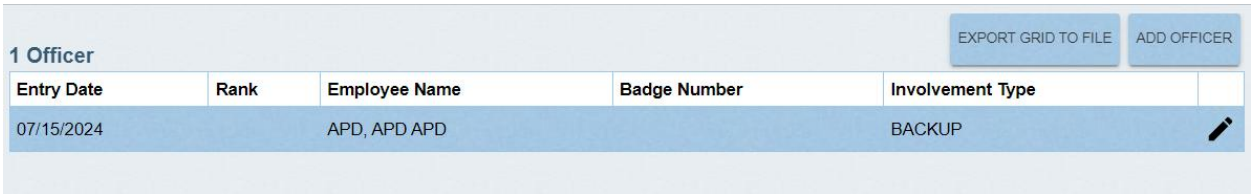


Once you have added the inmate, add any relevant **Charges, Cases, Prisoner #, and Transport #** to the transportation. Click **Save** when finished.

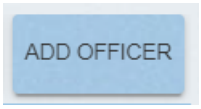




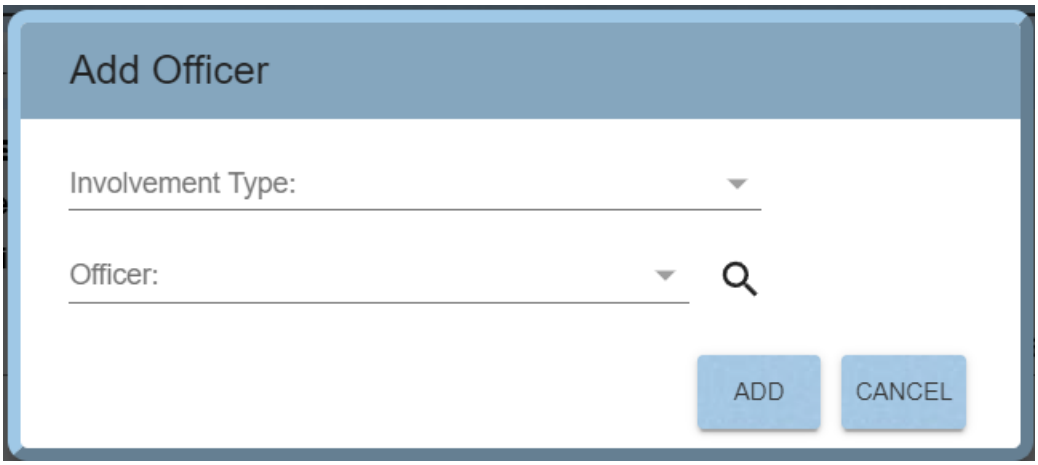
The **Officer** tab allows you to add officers to this transport so you can record the officers who are going on the transport or extradition trip.

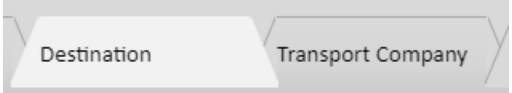


To add an additional officer, simply click **Add Officer**.

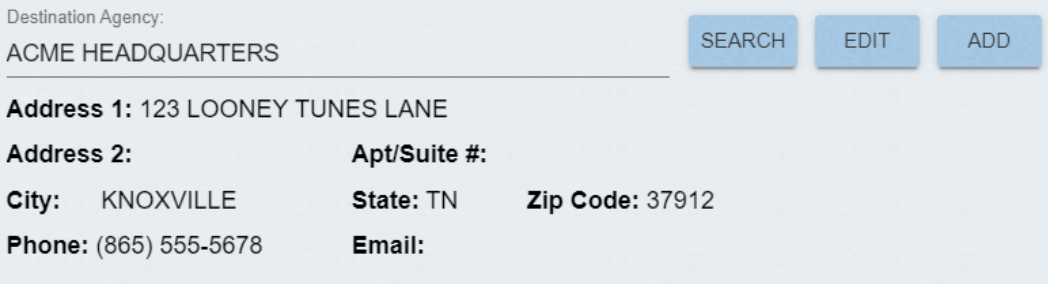


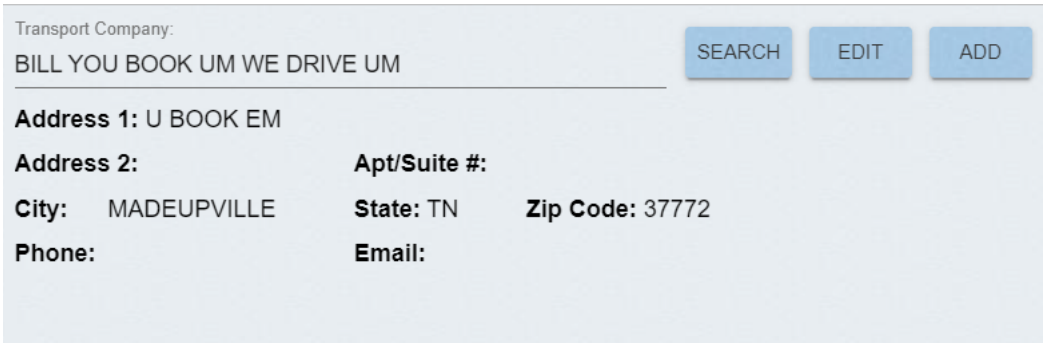
This will allow you to select an officer and the reason for their involvement in the transportation (such as being the driver, backup, observer, etc.) Use the magnifying glass symbol to search for an officer. Click **Add** when finished.



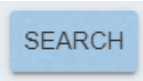


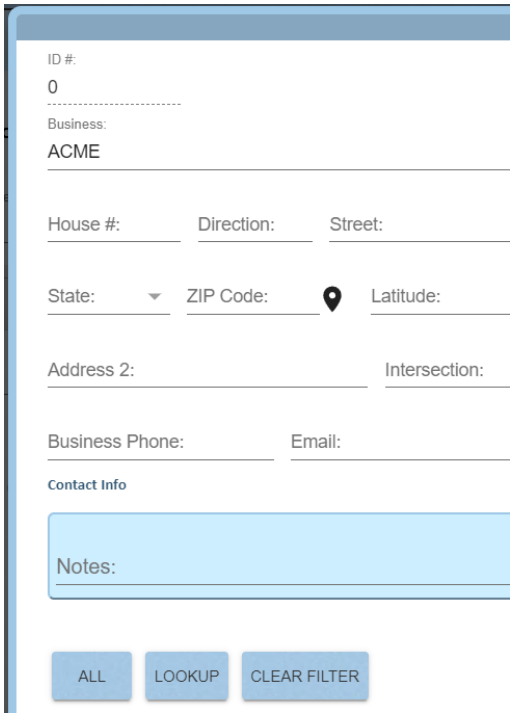
The **Destination** tab and **Transport Company** tabs allow you to record the destination agency where the inmates are being taken and the company taking them there, respectively.



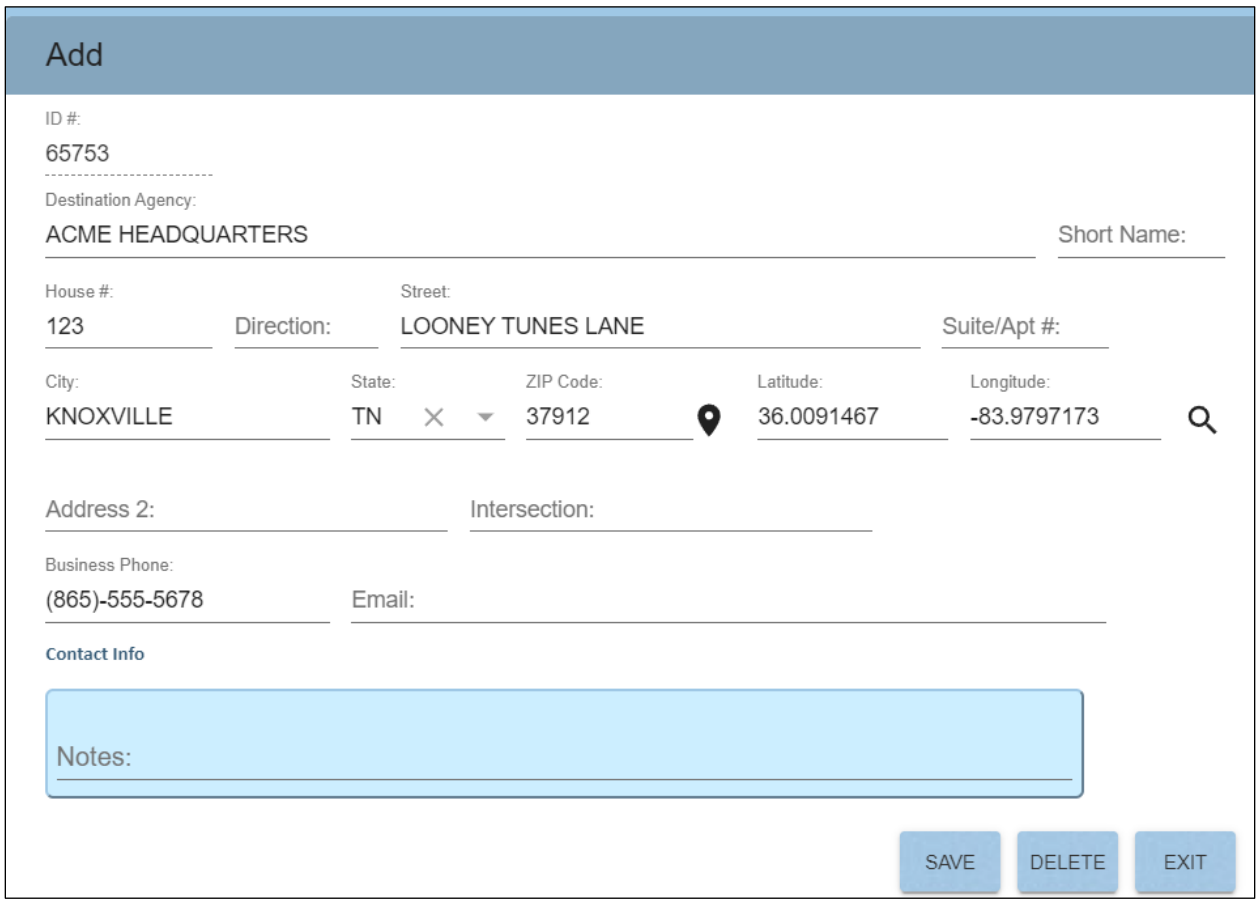


These tabs search the businesses that are stored in your iSOMS system. You can simply search by typing in the field. A more detailed search is available if you click the *Search* button.

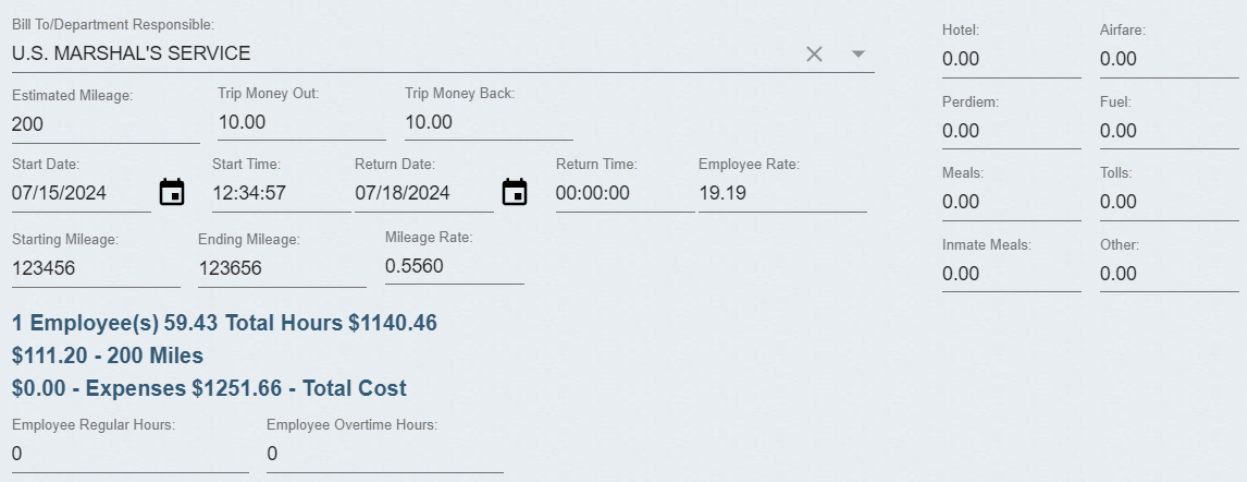




If you need to add a new location, simply click **ADD** and fill out the relevant address and contact information.

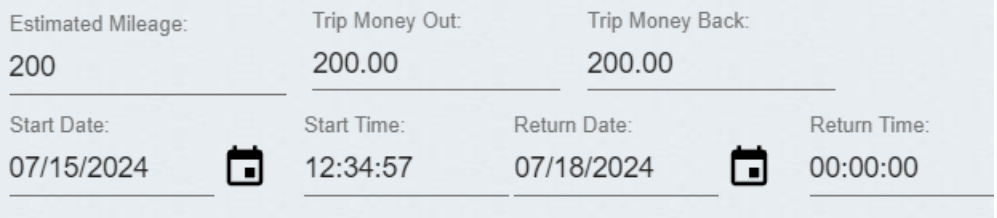


The **Return Info** tab lets you record money and mileage on the trip.



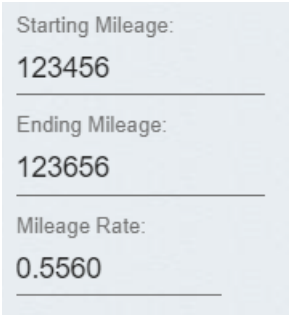
Add the agency who is responsible to the **Bill To/Department Responsible** field.

Then fill out **Estimated Mileage**, **Trip Money In/Out, Start Date**, and **Return Date**.



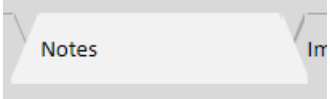
When the trip is over, you can fill out each of the expense fields to keep track of the cost of the trip and to get the mileage amount for taxes, billing, etc.



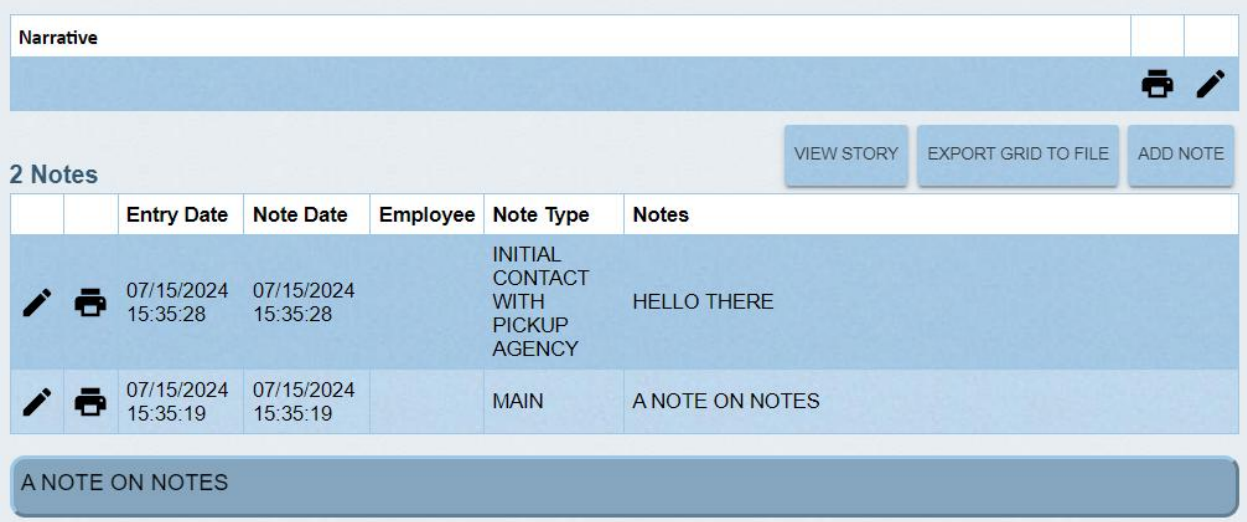


Finishing Up

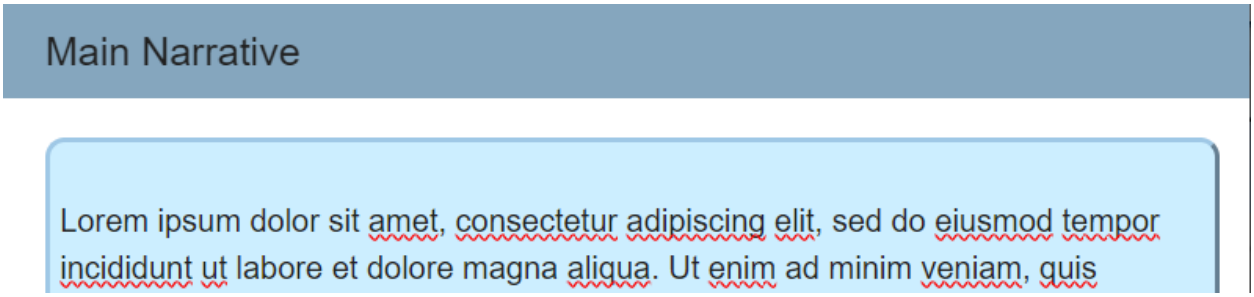
At this point, you have filled in the five tabs that are usually necessary. You can click **Save** to save the record. If you need to add any notes, images, or attachments, see the entries below.



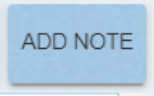
The **Notes** tab is used to view or add notes pertinent to the transportation. Double-click on any entry in the table to edit or view it.

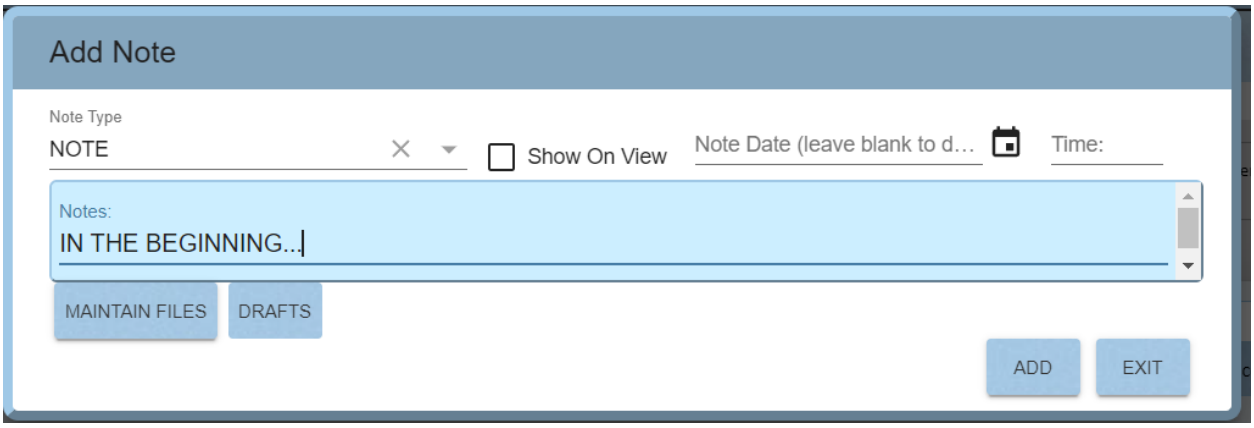


Narrative acts as an area where you can add a long note. This is useful when you want to add important or long form notes that won't be mixed in with the rest of the short notes.



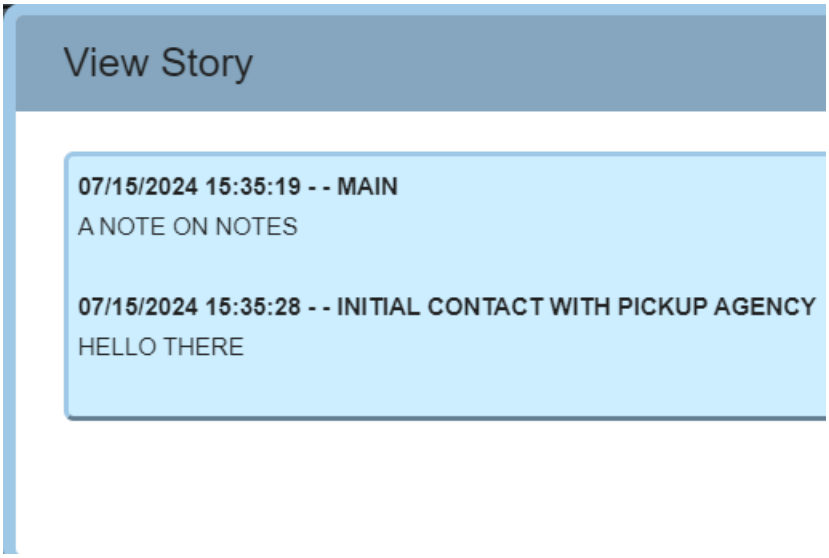
Use **Add Note** to add a new note.

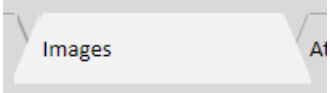




The **View Story** button will show all notes (except Narrative) that have been added on one page.



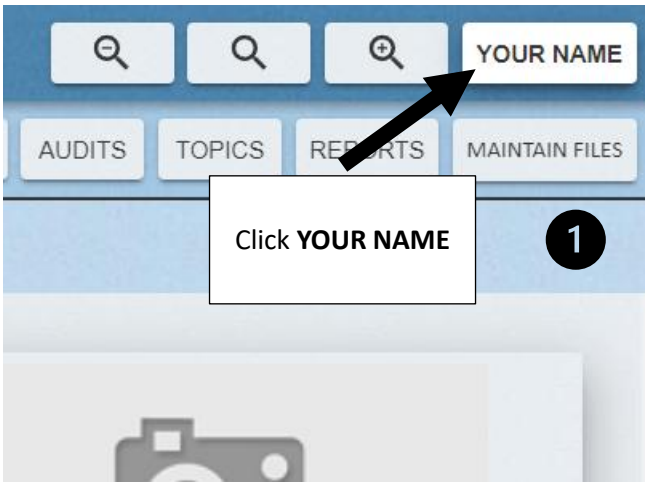


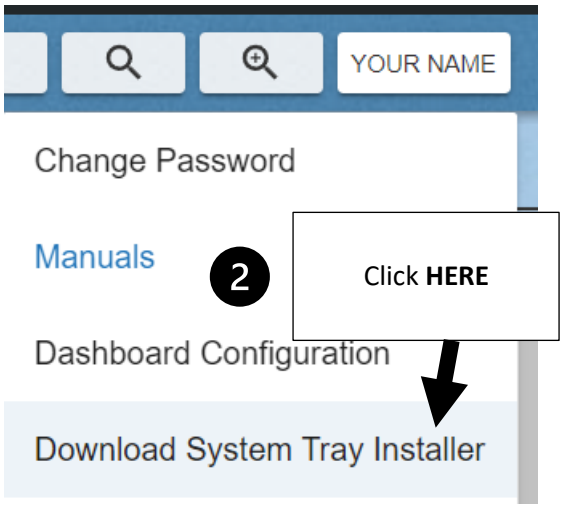


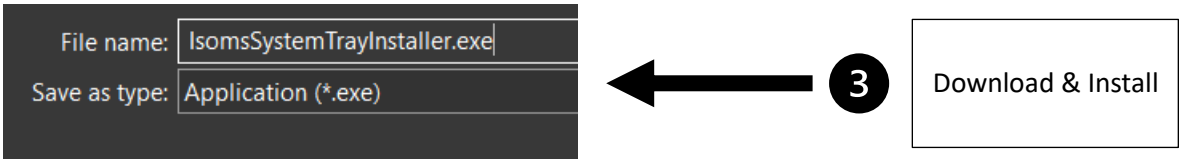
The **Images** tab is used to view, download, or add images. You can add a single image at a time or multiple images at a time. Click **Add Image** to add a single image.



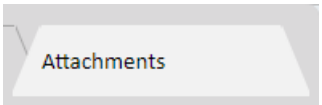
To add multiple images at a time, you will need the System Tray Installer downloaded to the computer you are using. The System Tray Installer can be found on the iSOMS home page by clicking on the button in the upper right with your username. Once you click on that, you will get a drop-down list, and **Download System Tray Installer** is one of the options. Download and install it on this computer.



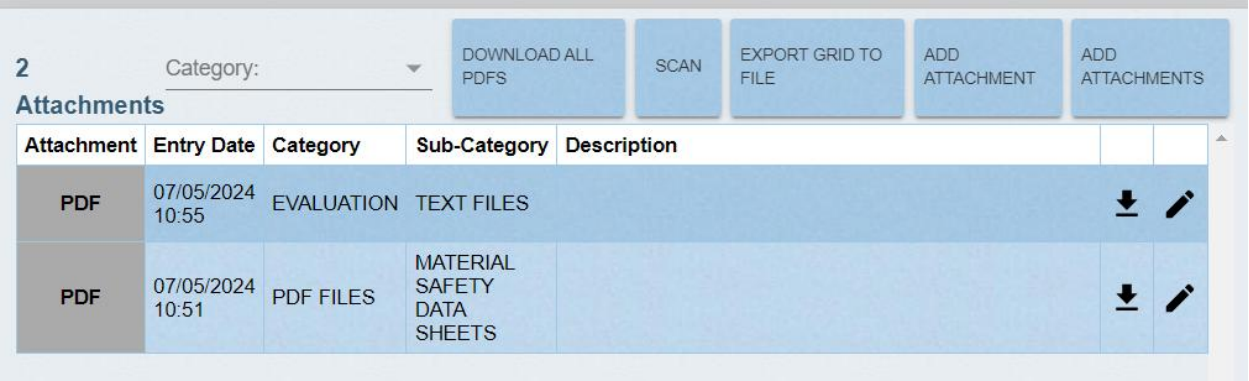




After you have the System Tray Installer on the computer, you can now use the **Add Images** button to upload multiple images at once if necessary.

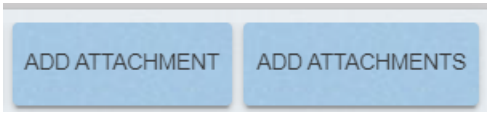


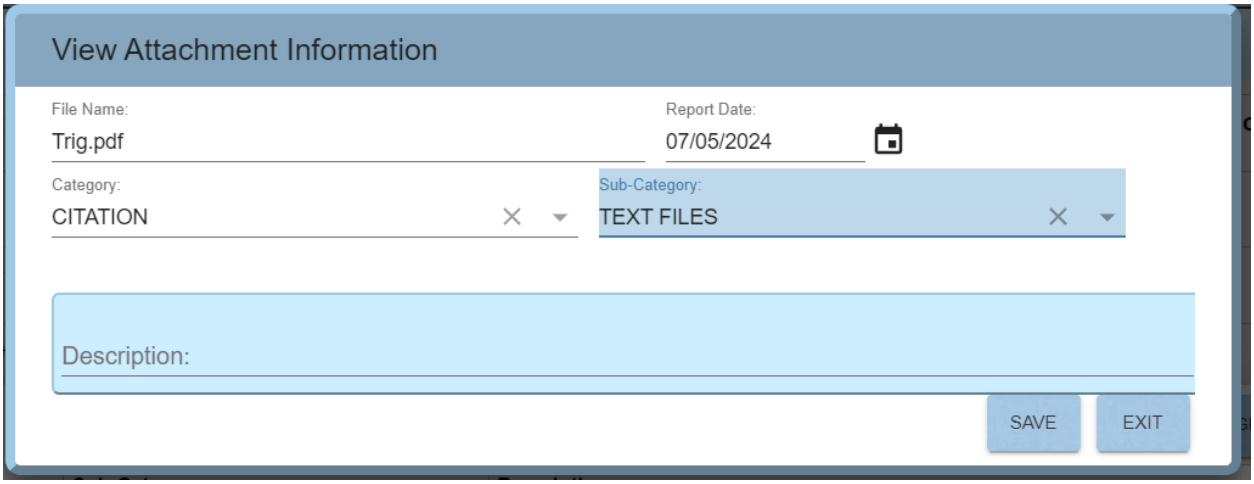
The **Attachments** tab is used to view, download, or add attachments. Double-click a file entry to view the record for the attachment or click on the icon to download the attachment to the computer.



You can add a single attachment at a time or multiple attachments at a time. Just like above with images, you will need the System Tray Installer downloaded to the computer you are using to add multiple attachments at once. See the *Image* tab instructions on the previous few pages for instructions on installing the System Tray Installer.

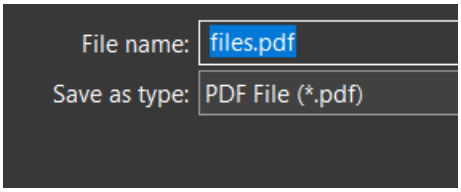
Click **Add Attachment** to add a single attachment or click **Add Attachments** to add multiple attachments at the same time. Choose the attachments from the computer, then add the appropriate category and sub-category for the file.



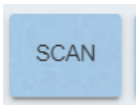


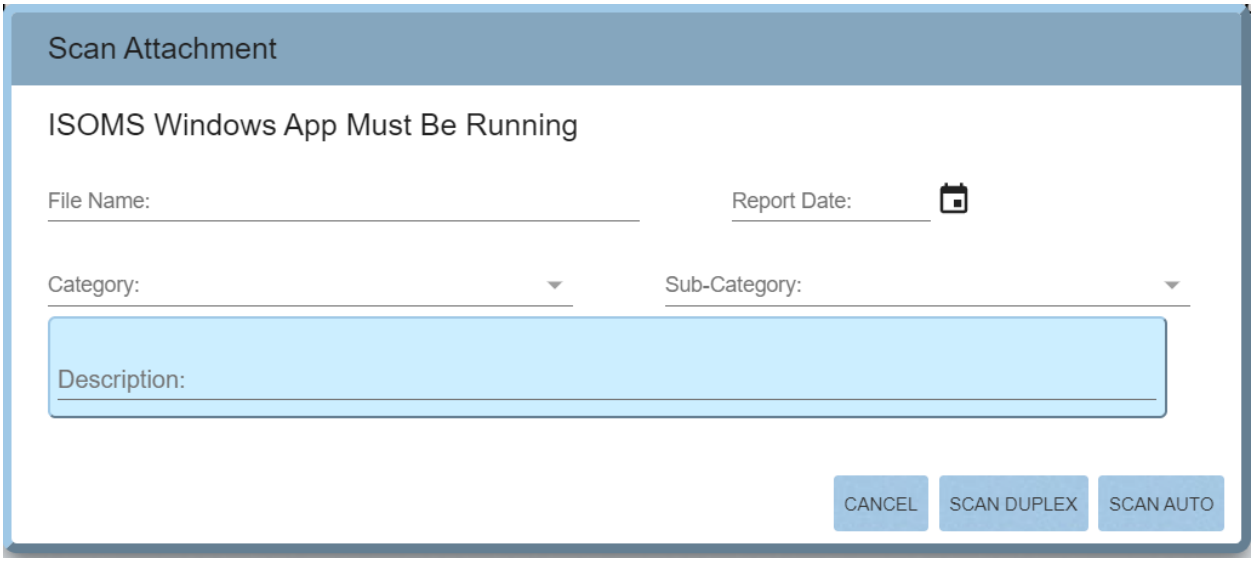
You can also **Download All PDFs** at once by clicking the appropriate button.





If you have the iSOMS Windows App, you can use **Scan** to scan files into the attachments.





Inmate Tracking Overview

iSOMS provides a variety of ways to keep track of inmates. You can use the *Inmate Tracking* modules to track appointments, cell checks, jail incidents, grievance reports, mail, use of force, and more. This section covers how to use the different parts of iSOMS underneath the *Inmate Tracking* heading in *Corrections.*

The **Appointment Log** module syncs with records from the **Appointments** tab in Booking (pg. 136) and allows you to search appointments, view previous or upcoming appointments, create new appointments for any inmate, and run reports on appointment records.

The **Mail Log** module syncs with records from the **Mail Log** tab in Booking (pg. 137) and allows you to search recorded mail, view mail records, create new mail records for any inmate, and run reports on mail records.

The **Movements / Tracking** module syncs with records from the **Movement** tab in Booking (pg. 123) and allows you to search recorded movements, view previous or upcoming movement records, perform group movements, create new movement records for any inmate, and run reports on movement records.

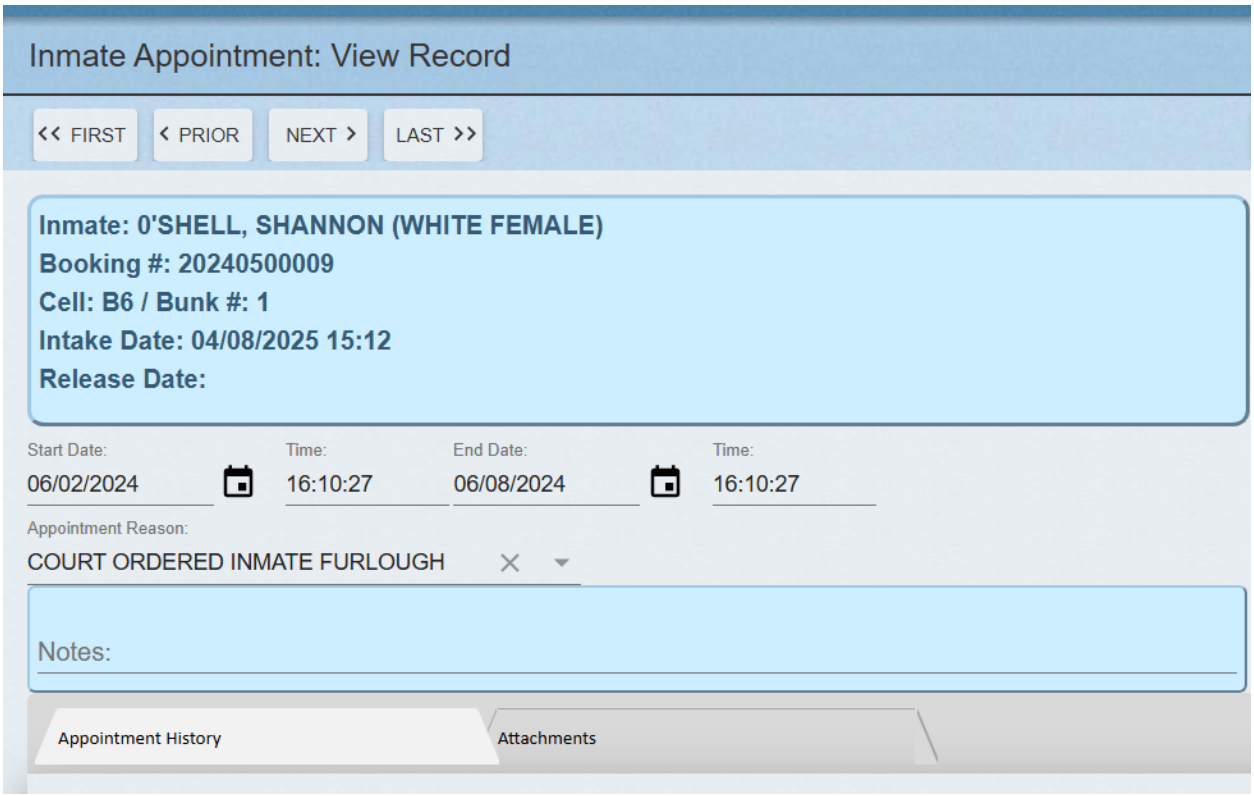
The **Grievance Reports** module allows you to record inmate grievance records and administrative decisions on those records. It syncs with records from the **Grievance** tab in Booking (pg. 158) and allows you to search grievance records, view grievance records, create new grievance records for any inmate, add notes on the grievance and disposition, and run reports on grievance records.

The **Jail Incidents** module lets you write reports on incidents that occurred in jail, what happened, what was done about it administratively, and any additional notes desired. As with most other modules, you can search and view incident records, create new jail incident reports, and run reports on jail incident records.

The **Use of Force** module lets you write reports on use of force, what happened, what was done about it administratively, and any additional notes desired. As with most other modules, you can search and view use of force records, create new use of force records, and run reports on use of force records.

Appointment Log

The **Appointment Log** module takes all the appointments created in **Intake** / **Booking Records** and compiles them so you can see the appointments of all inmates easily instead of having to search each inmate. You can also run reports on appointments to get a list, details on a specific inmate and their appointments, or statistics based on appointment types.



The first part of this section explains searches. If you need explanations on an already existing appointment, see the *Filling Out an Appointment Log Record* to get more information on the different fields and tabs available.

Searching for Existing Appointments

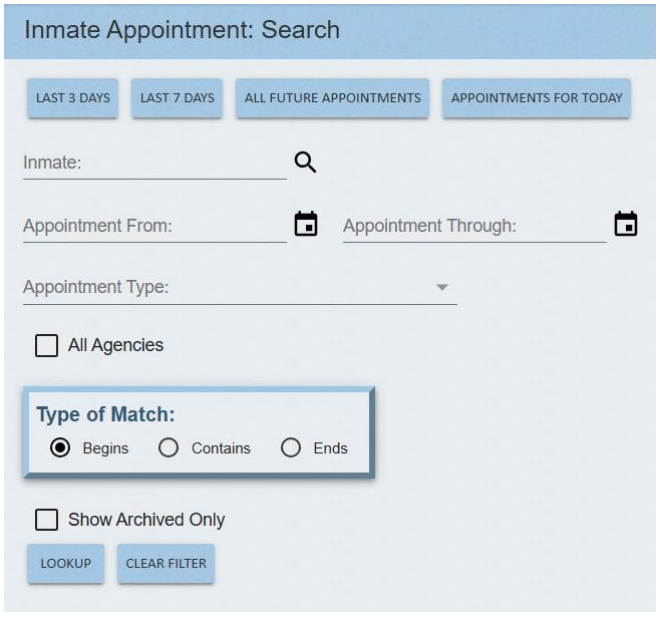
To search existing appointment records, begin on the iSOMS home screen.

Navigate to:

Corrections → Inmate Tracking → Appointment Log



This will open the **Inmate Appointment: Search** screen. Here you can search and filter for different appointment records. You can either use the blue buttons to do *quick searches* or enter information in the fields to do *standard searches.*



Quick Searches

Several different quick searches are available by using the blue buttons.

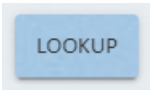


Last 3 Days and **Last 7 Days** will show you all the appointments in the specified recent time periods.



To see every upcoming appointment, simply click **All Future Appointments.** To see today's appointments for all inmates, click **Appointments for Today.**

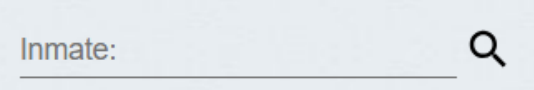
Standard Searches



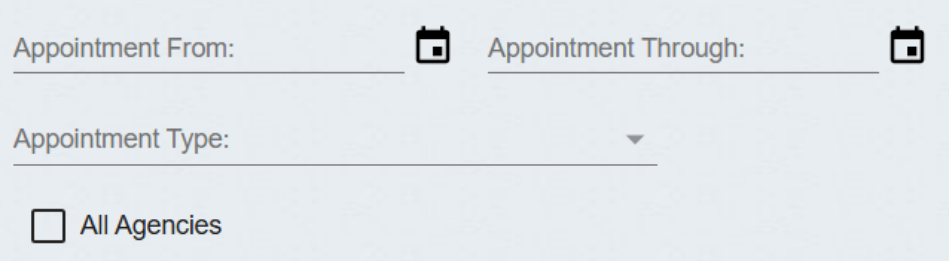


Various fields are available if you need to do a search that the quick searches won't work for. Fill in the fields to narrow the search and click **Lookup** at the top or bottom of the page to perform the search. If you need to start over, simply click **Clear Filter** to remove all search field entries.

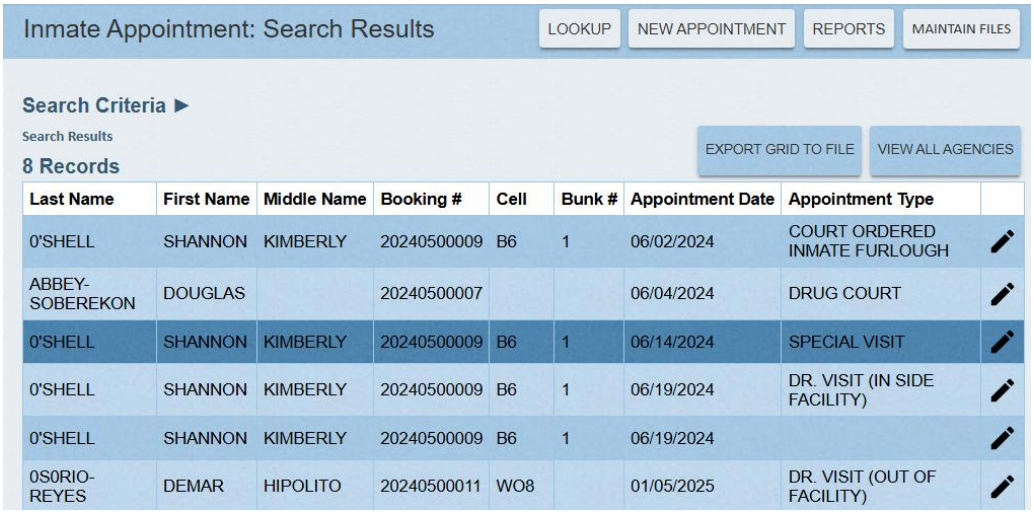
Field Explanations



This field, **Inmate**, lets you search for a specific inmate's records. Just type their name and a search box will open, or click the magnifying glass and you can find an inmate to search for just their appointments.



Use these fields to narrow the search by date range or appointment type. Use **Appointment From** and **Appointment Through** to search between the dates selected. Add an **Appointment Type** to only show that appointment type on the search.



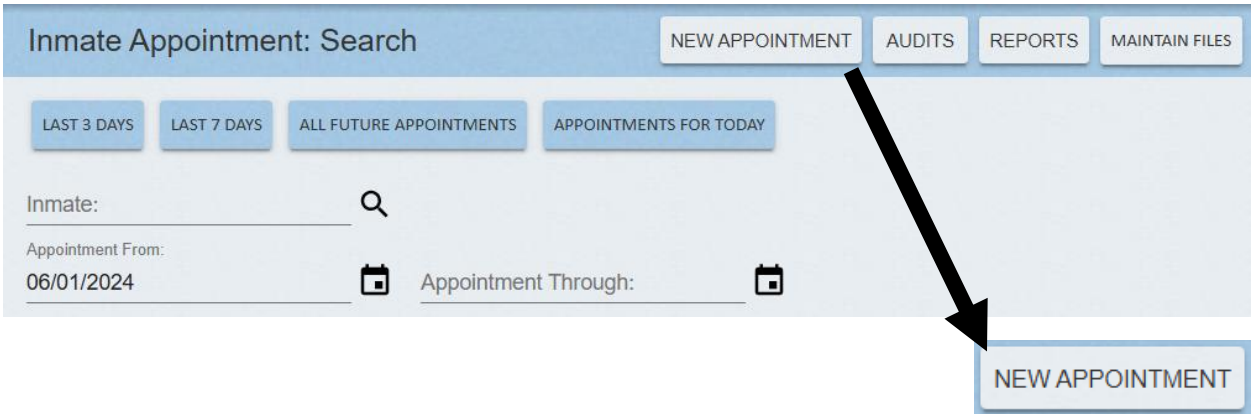
Last Name	First Name	Middle Name	Booking #	Cell	Bunk #	Appointment Date	Appointment Type	
0'SHELL	SHANNON	KIMBERLY	20240500009	B6	1	06/02/2024	COURT ORDERED INMATE FURLOUGH	
ABBEY-SOBEREKON	DOUGLAS		20240500007			06/04/2024	DRUG COURT	
0'SHELL	SHANNON	KIMBERLY	20240500009	B6	1	06/14/2024	SPECIAL VISIT	
0'SHELL	SHANNON	KIMBERLY	20240500009	B6	1	06/19/2024	DR. VISIT (IN SIDE FACILITY)	
0'SHELL	SHANNON	KIMBERLY	20240500009	B6	1	06/19/2024		
0S0RIO-REYES	DEMAR	HIPOLITO	20240500011	WO8		01/05/2025	DR. VISIT (OUT OF FACILITY)	

As mentioned above, when you have finished with your search parameters, click **Lookup** to perform your search. Double click on the desired entry to view, edit, or delete the record.

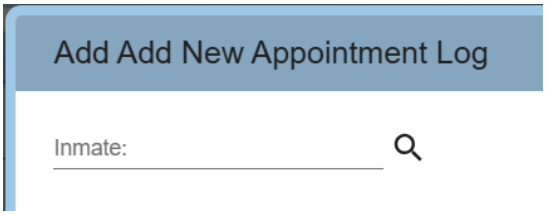
Creating a New Appointment Log Record

Typically, appointments are created on an inmate's booking record under the **Appointments** tab. See page 136 for more information on how to add appointments under that tab.

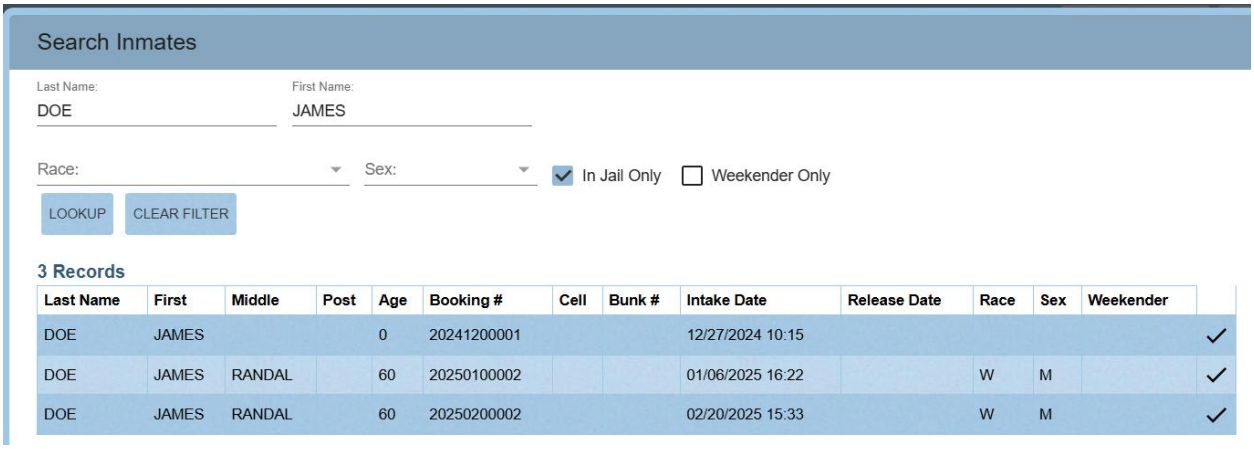
The **Appointment Log** module also allows you to create appointments here. Navigate to the search screen and click **New Appointment** in the upper right.

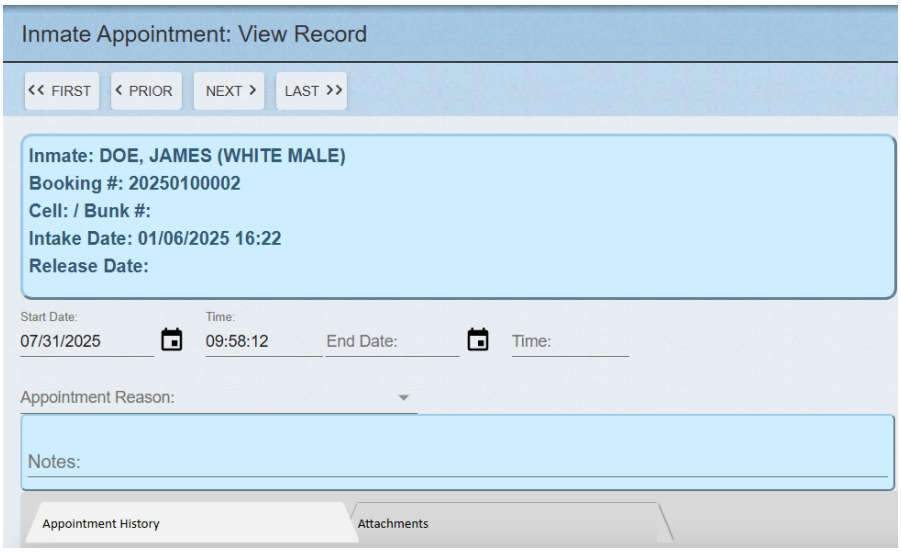


This will open a search box. Type the name of the inmate and a search box will open, or click the magnifying glass and you can find an inmate to add an appointment for.



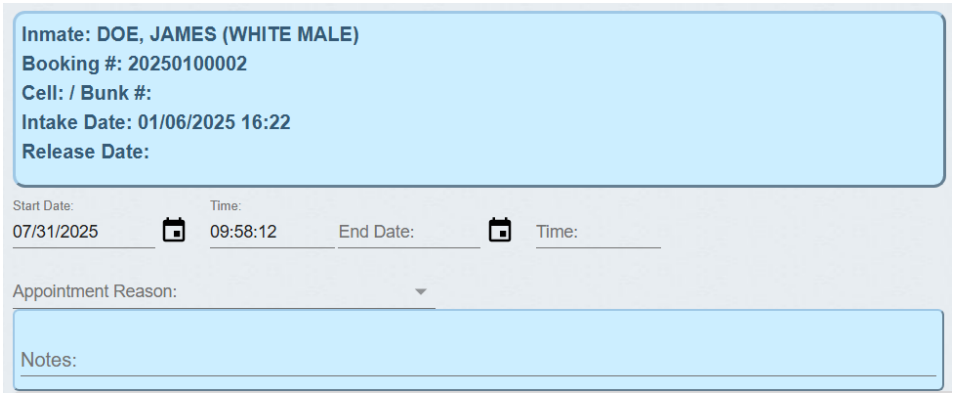
Add name or other search parameters and click **Lookup.** Click the checkmark symbol (✓) to select the inmate for the appointment record. Then click **ADD** to create a new appointment.



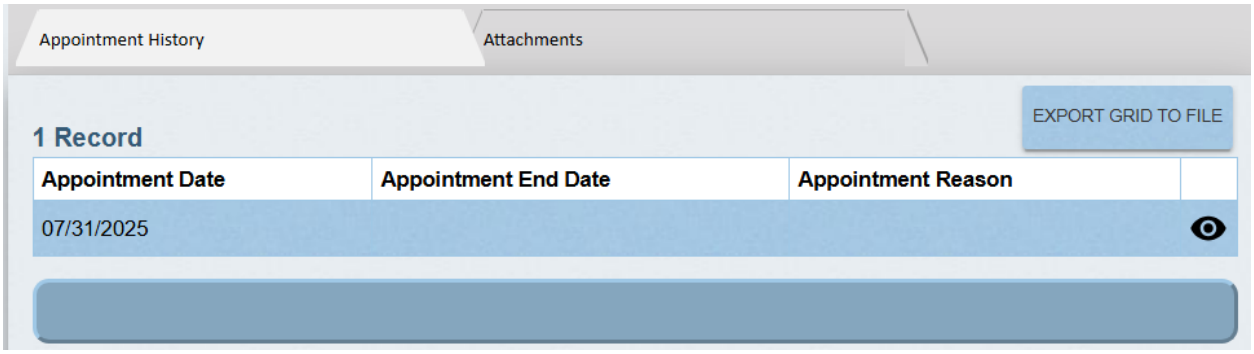


There are two primary sections of the report:

1. The *fields* in the upper part of the screen. These record details about the inmate, the appointment, and brief notes.



2. The *tabs* record information about other appointments and any attachments for this appointment.



Fill out the fields at the top of the screen. If attachments are needed, you can add them in the **Attachments** tab. This process is covered in detail in the next section, *Filling Out an Appointment Record.*

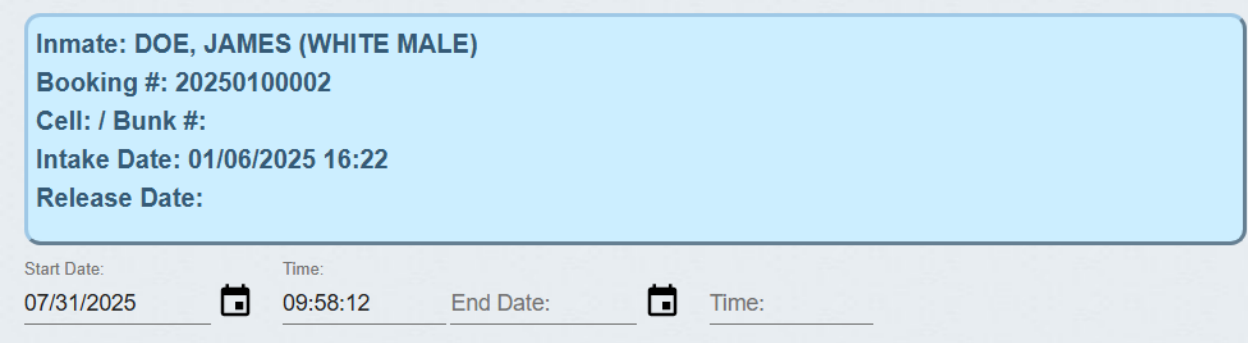
After you enter new details, make sure to click **Save** at the top of the screen.



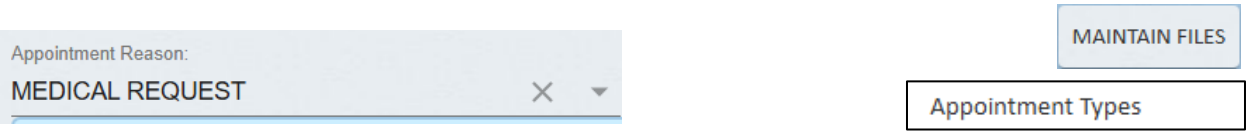
Filling Out an Appointment Record – Fields

This section explains in detail the different fields and tabs for an Appointment record. The top section of the report with fields should always be filled out when relevant information is available, and the tabs should be filled out as needed. Appointments are very brief to fill in, so this is not a difficult or involved process.

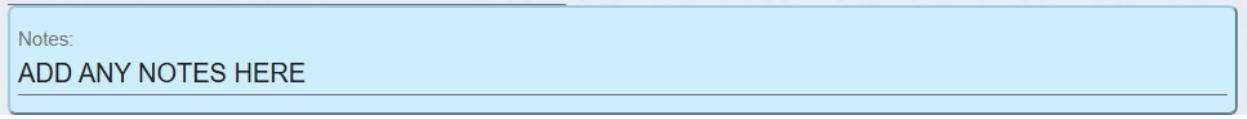
Fields



The **Start Date** and **Time** will automatically be set, but this may not be when the appointment is, so change these fields to the appointment date. Then add when the appointment ends in **End Date** and **Time.**



Add the **Appointment Reason,** such as *Medical Request, Dr. Visit, Special Visit, etc.* There are various options, but if you need to add more, have a Super User add them in Maintain Files. (See *Appendix B: Maintain Files Entries* on page 726 for how to do this.)



Now you can add any additional notes here in the **Notes** box.

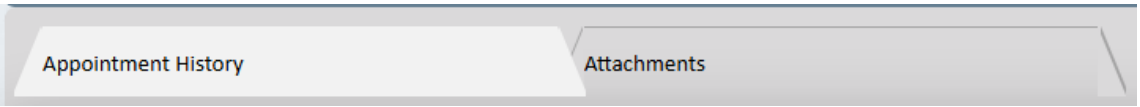
Filling Out an Appointment Record – Tabs

Summary

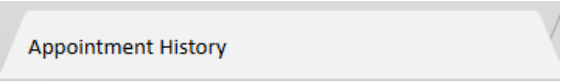
Usually, you don't have to add anything to the tabs for appointments, but the two available are shown below.

The **Appointment History** tab is a **read-only** tab and shows all other appointments for the inmate.

The **Attachments** tab allows you to attach files to this appointment record.



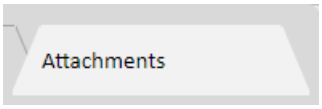
Appointment History Tab



The **Appointment History** tab is a **read-only** tab. It shows a list of all other appointments the inmate has had or has coming up. If you want to open the appointment record, simply double-click it on the table or click the View Icon () to open it.



Attachments Tab

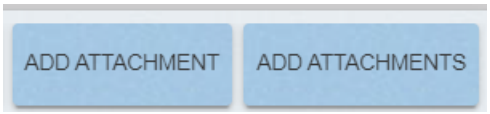


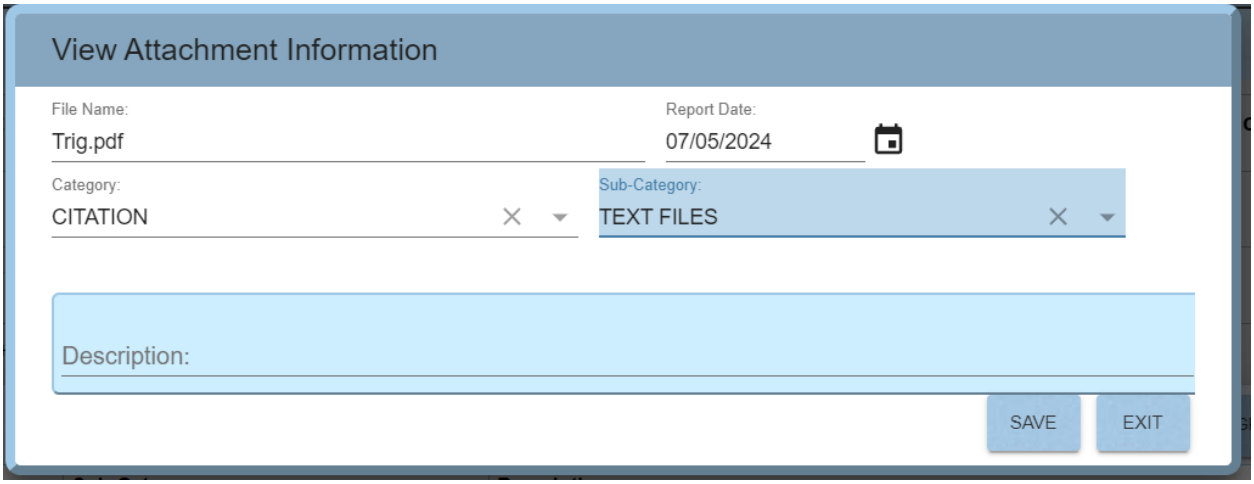
The **Attachments** tab is used to view, download, or add attachments. Double-click a file entry to view the record for the attachment or click on the icon to download the attachment to the computer.



You can add a single attachment at a time or multiple attachments at a time. Just like above with images, you will need the System Tray Installer downloaded to the computer you are using to add multiple attachments at once. See the *Image* tab instructions on the previous few pages for instructions on installing the System Tray Installer.

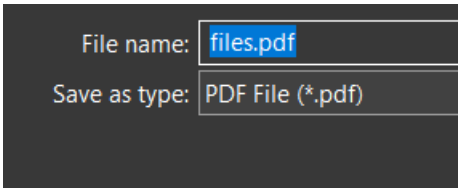
Click **Add Attachment** to add a single attachment or click **Add Attachments** to add multiple attachments at the same time. Choose the attachments from the computer, then add the appropriate category and sub-category for the file.



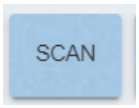


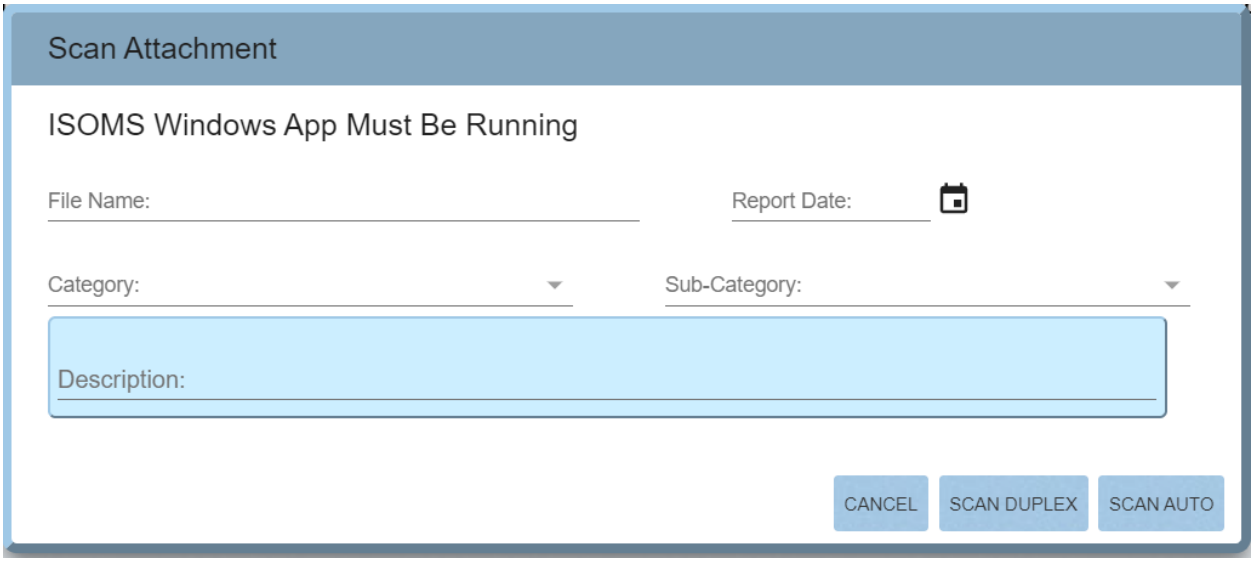
You can also **Download All PDFs** at once by clicking the appropriate button.





If you have the iSOMS Windows App, you can use **Scan** to scan files into the attachments.

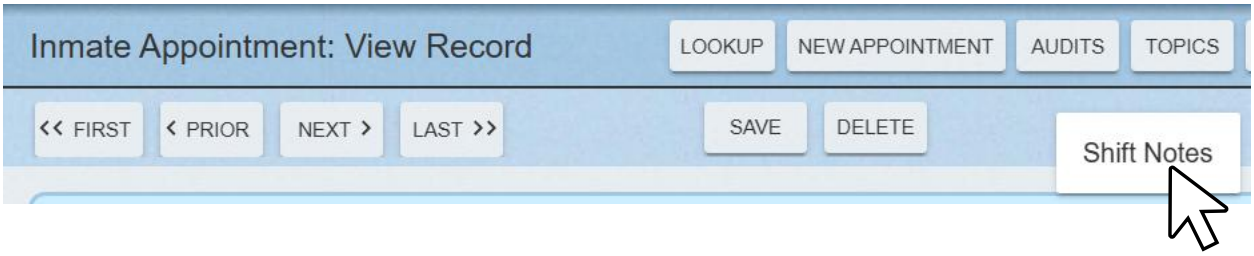




Appointment Log Topics

The **Topics** button lets you do special actions in different modules. In **Appointment Log**, if you use the **Topics** button, you will be able to quickly open the **Shift Notes** module right from here.

Once you have opened the **Appointment Log** module, you can click **TOPICS → SHIFT NOTES** in the upper right.



This will open the **Shift Notes** module. If you want more information on the **Shift Notes** module, please see *Shift Notes* on page 275.

Appointment Log Reports

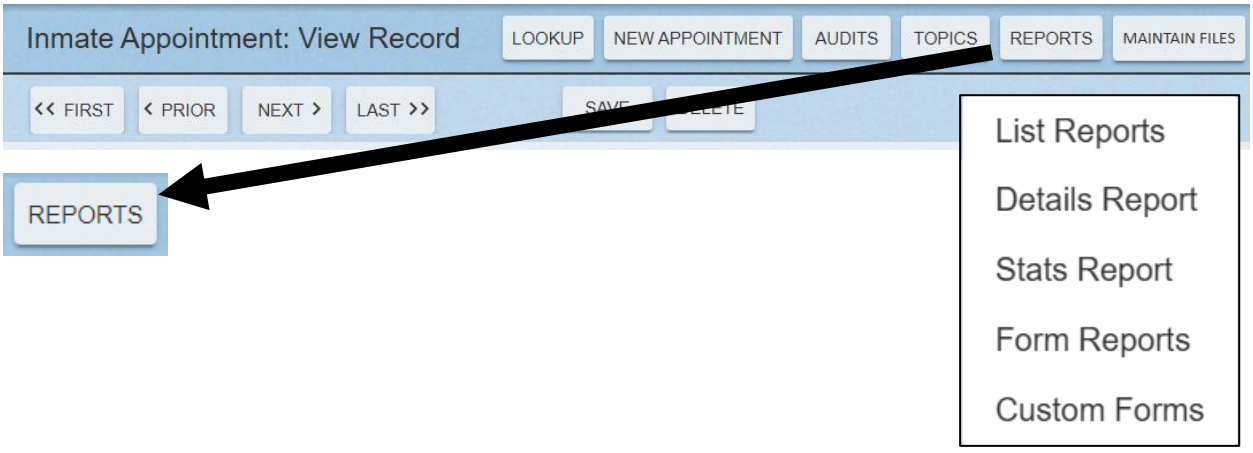
iSOMS has the capability to allow you to print different types of reports for appointment records.

To access the reports, begin on the iSOMS home screen. Navigate to:

Corrections → Inmate Tracking → Appointment Log

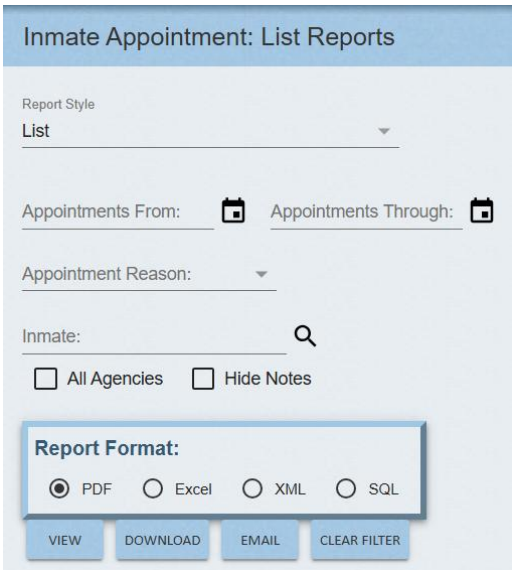


Now click on the **Reports** button in the upper right corner and select the report you wish to run. Different reports are explained over the next set of pages.



List Reports

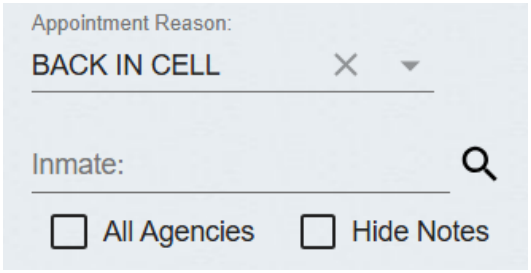
The **List Report** displays Appointment records in iSOMS over a certain date range. In this way you can see a list of appointments over your chosen time period. Add the start and end date in **Appointments From** and **Appointments Through.**



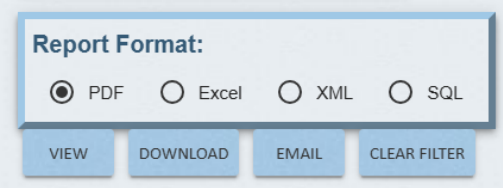
Report Style has some different layout and sorting options, such as *List, Group by Appointment Reason, List with Image,* and *Group by Appointment Reason with Image*. Pick the one most relevant to your desired result.



You can filter to one appointment reason or inmate, as well as hide notes on the appointment records if necessary.



Now, with your chosen parameters, click **View** or **Download** to view the report.



List Report

YOUR AGENCY

Appointment Log

Appointment Dates From 01/01/2024 Through 07/31/2025

Page 1 of 1

Inmate Name	Booking #	Appointment Date/Time	Appointment Reason	Intake Date/Time	Cell
SMITH, ADAM ROCKY	20240500006	05/15/2024 13:11	No Appointment Reason	05/14/2024 14:47	--
0'SHELL, SHANNON KIMBERLY	20240500009	06/02/2024 16:10	COURT ORDERED INMATE	04/08/2025 15:12	B-B6-1
ABBEY-SOBEREKON, DOUGLAS	20240500007	06/04/2024 12:08	DRUG COURT	05/20/2024 14:19	--
0'SHELL, SHANNON KIMBERLY	20240500009	06/14/2024 16:09	SPECIAL VISIT	04/08/2025 15:12	B-B6-1
0'SHELL, SHANNON KIMBERLY	20240500009	06/19/2024 16:08	DR. VISIT (IN SIDE FACILITY)	04/08/2025 15:12	B-B6-1
0'SHELL, SHANNON KIMBERLY	20240500009	06/19/2024 16:13	No Appointment Reason	04/08/2025 15:12	B-B6-1
0S0RIO-REYES, DEMAR HIPOLITO	20240500011	01/05/2025 15:00	DR. VISIT (OUT OF FACILITY)	05/29/2024 13:51	-WO8-
test					
ADAMS, RONNIE TRACY JR	2006005397	05/20/2025 14:06	DR. VISIT (OUT OF FACILITY)	09/18/2006 18:15	D-D414A-
DOE, JAMES RANDAL	20250100002	07/31/2025 09:25	ATTORNEY CLIENT VISITATION	01/06/2025 16:22	--
DOE, JAMES RANDAL	20250100002	07/31/2025 09:58	ACTIVITY AT ARMORY	01/06/2025 16:22	--
DOE, JAMES RANDAL	20250100002	07/31/2025 10:27	ACTIVITY AT ARMORY	01/06/2025 16:22	--

Report Count: **11**

Group by Appointment Reason Report

YOUR AGENCY

Appointment Log (By Appointment Type)

Appointment Dates From 01/01/2024 Through 07/31/2025

Page 2 of 2

DR. VISIT (IN SIDE FACILITY)

Inmate Name	Booking #	Appointment Date/Time	Intake Date/Time	Cell	Out Time	In Time
0'SHELL, SHANNON KIMBERLY	20240500009	06/19/2024 16:08	04/08/2025 15:12	B-B6-1	_____	_____

Sub Count: **1**

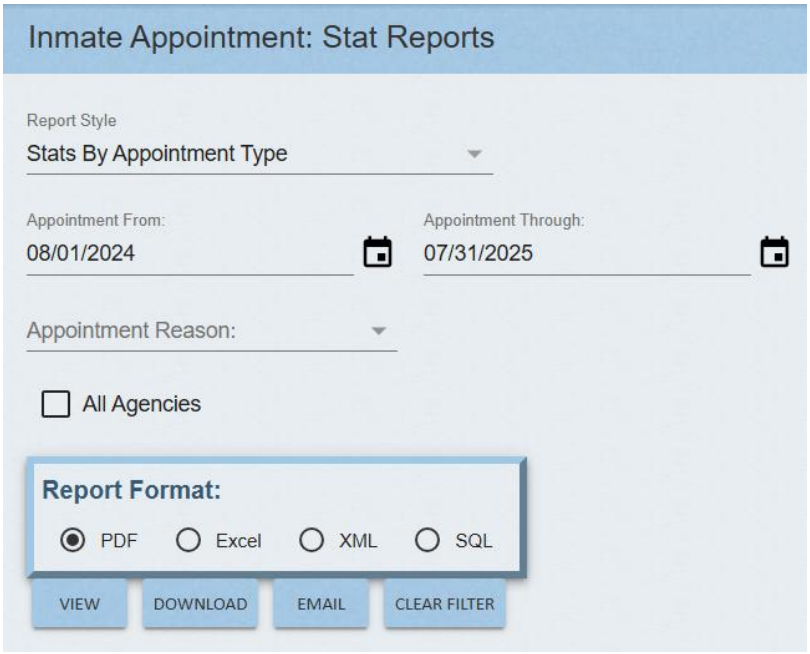
DR. VISIT (OUT OF FACILITY)

Inmate Name	Booking #	Appointment Date/Time	Intake Date/Time	Cell	Out Time	In Time
0S0RIO-REYES, DEMAR HIPOLITO	20240500011	01/05/2025 15:00	05/29/2024 13:51	-WO8-	_____	_____
test						
ADAMS, RONNIE TRACY JR	2006005397	05/20/2025 14:06	09/18/2006 18:15	D-D414A-	_____	_____

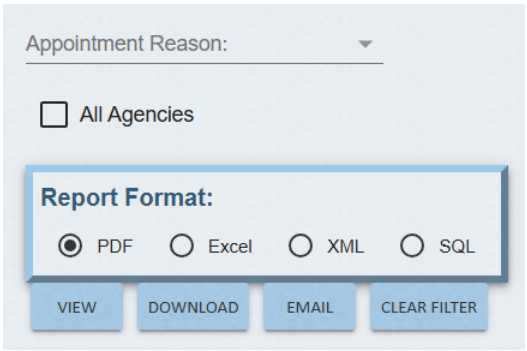
Sub Count: **2**

Stat Reports

This report displays Appointment stats in iSOMS over a certain date range. In this way you can see statistics for your records over a certain period. Add the start and end date in **Appointment From** and **Appointment Through.** This report has only one *Report Style* right now: you will get stats based on the appointment type.



You can add a filter to restrict to only one reason if you wish. Now, with your chosen parameters, click **View** or **Download** to view the report.



YOUR AGENCY

Inmate Appointment Log - Stats By Type

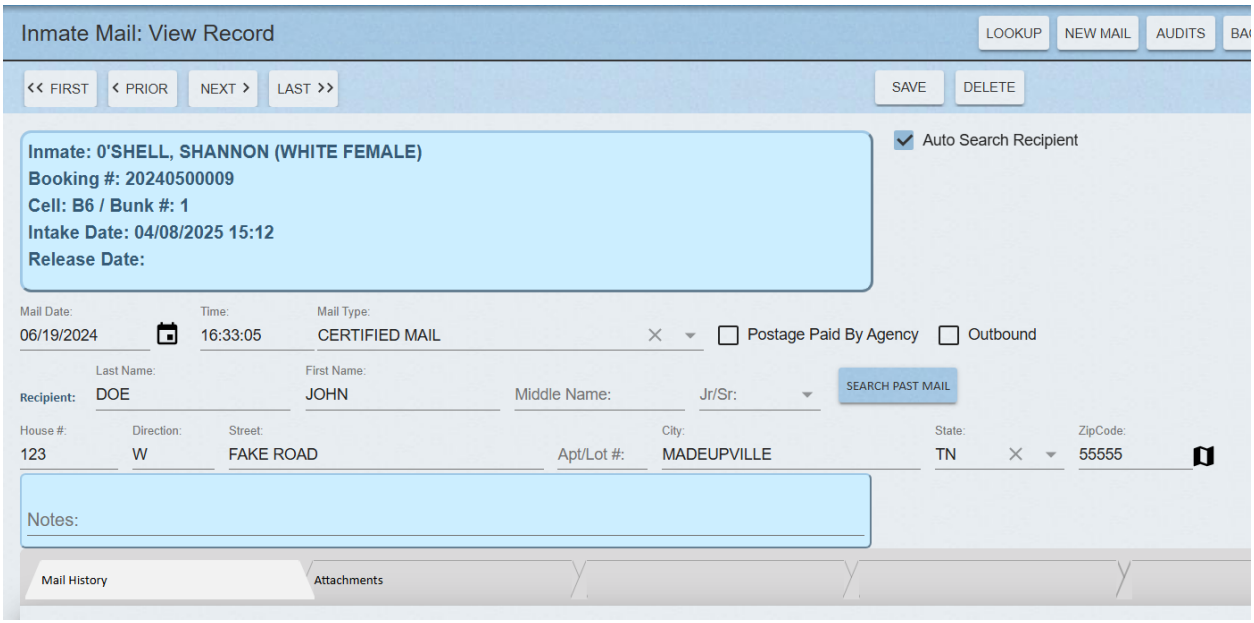
Report Dates From 02/01/2023 Through 07/31/2025

Page 1 of 1

Description	Count	% To Total
ACTIVITY AT ARMORY	2	16.67
ATTORNEY CLIENT VISITATION	1	8.33
COURT ORDERED INMATE FURLOUGH	1	8.33
DRUG COURT	1	8.33
DR. VISIT (IN SIDE FACILITY)	1	8.33
DR. VISIT (OUT OF FACILITY)	2	16.67
SPECIAL VISIT	1	8.33
No Appointment Reason	3	25.00
Report Count:	**12**	

Mail Log

The **Mail Log** module takes all the mail records created in **Intake** / **Booking Records** and compiles them so you can see the mail of all inmates easily instead of having to search each inmate. You can also run reports on mail log records to get a list, details on a specific inmate and their mail, or statistics based on mail.



The first part of this section explains searches. If you need explanations on an already existing record, see the *Filling Out a Mail Log Record* to get more information on the different fields and tabs available.

Searching for Existing Mail Records

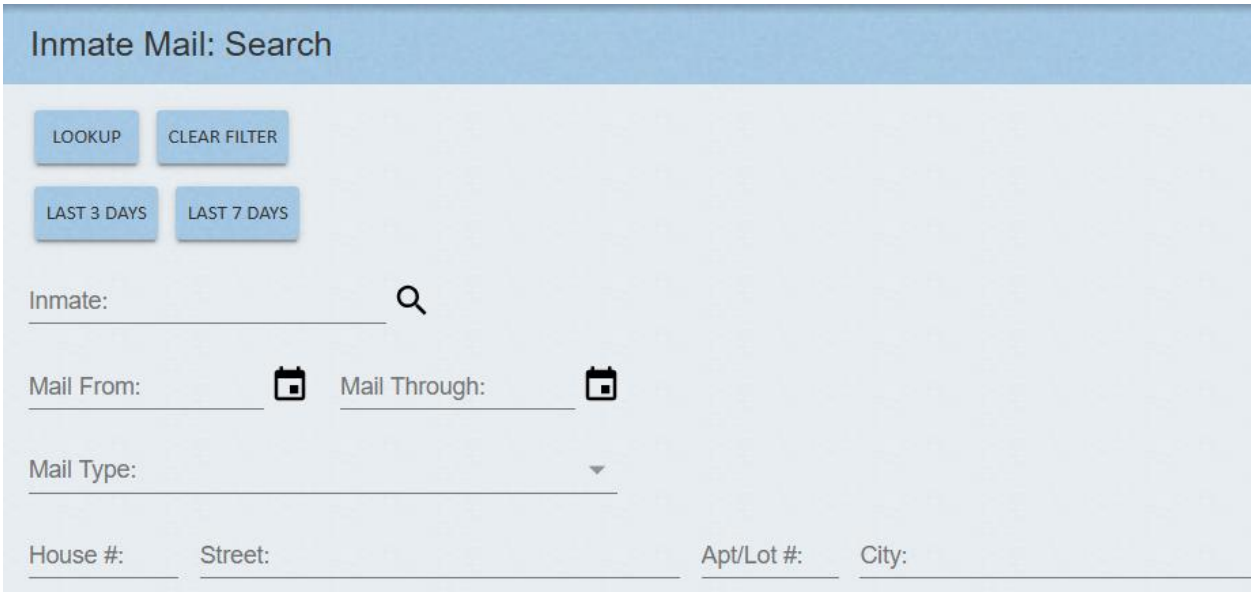
To search existing mail records, begin on the iSOMS home screen.

Navigate to:

Corrections → Inmate Tracking → Mail Log



This will open the **Inmate Mail: Search** screen. Here you can search and filter for different mail records. You can either use the blue buttons to do *quick searches* or enter information in the fields to do *standard searches.*



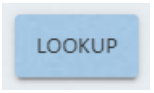
Quick Searches

A few different quick searches are available by using the blue buttons.



Last 3 Days and **Last 7 Days** will show you all the mail records in the specified recent time periods.

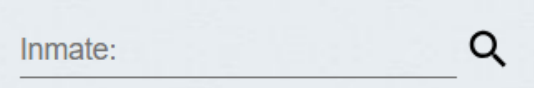
Standard Searches





Various fields are available if you need to do a search that the quick searches won't work for. Fill in the fields to narrow the search and click **Lookup** at the top or bottom of the page to perform the search. If you need to start over, simply click **Clear Filter** to remove all search field entries.

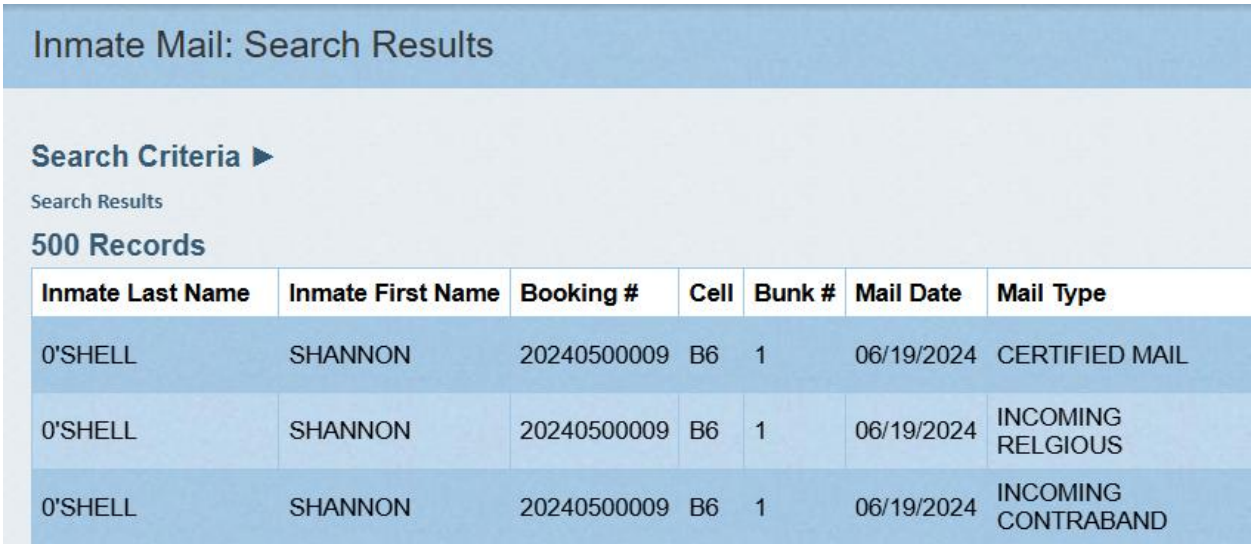
Field Explanations



This field, **Inmate**, lets you search for a specific inmate's records. Just type their name and a search box will open, or click the magnifying glass and you can find an inmate to search for just their mail records.



Use these fields to narrow the search by date range, mail type, or address. Use **Mail From** and **Mail Through** to search between the dates selected. Add a **Mail Type** to only show that mail type on the search. You can also add the address below these if needed.



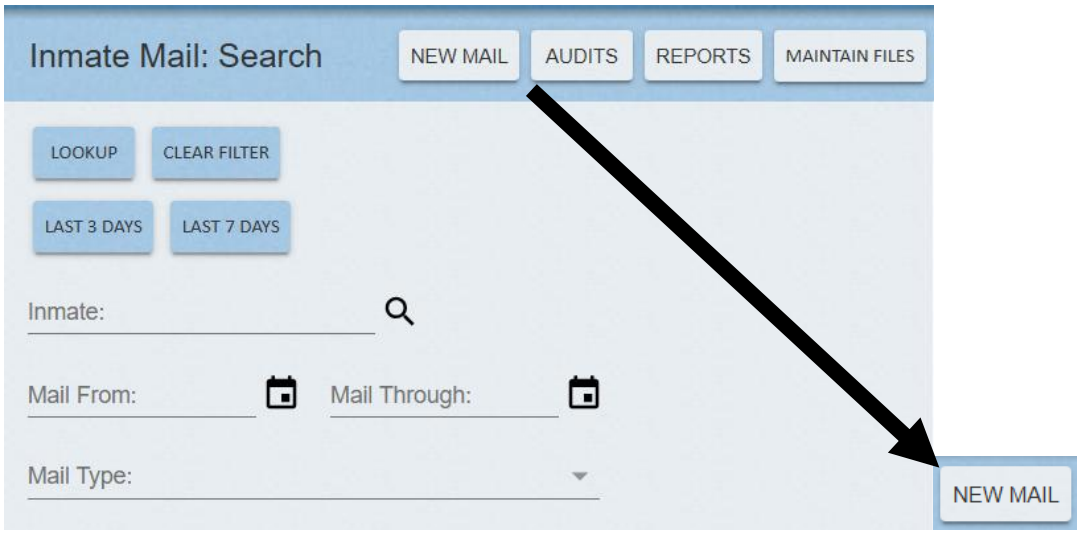
Inmate Last Name	Inmate First Name	Booking #	Cell	Bunk #	Mail Date	Mail Type
0'SHELL	SHANNON	20240500009	B6	1	06/19/2024	CERTIFIED MAIL
0'SHELL	SHANNON	20240500009	B6	1	06/19/2024	INCOMING RELGIOUS
0'SHELL	SHANNON	20240500009	B6	1	06/19/2024	INCOMING CONTRABAND

As mentioned above, when you have finished with your search parameters, click **Lookup** to perform your search. Double click on the desired entry to view, edit, or delete the record.

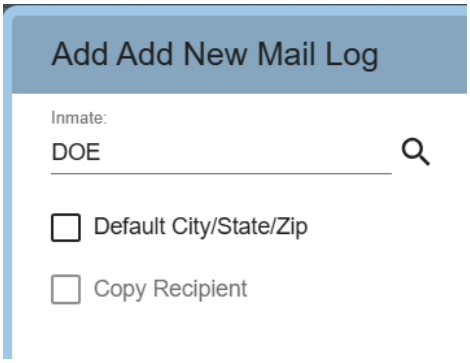
Creating a New Mail Log Record

Typically, mail records are created on an inmate's booking record under the **Mail Log** tab. See page 137 for more information on how to add mail records under that tab.

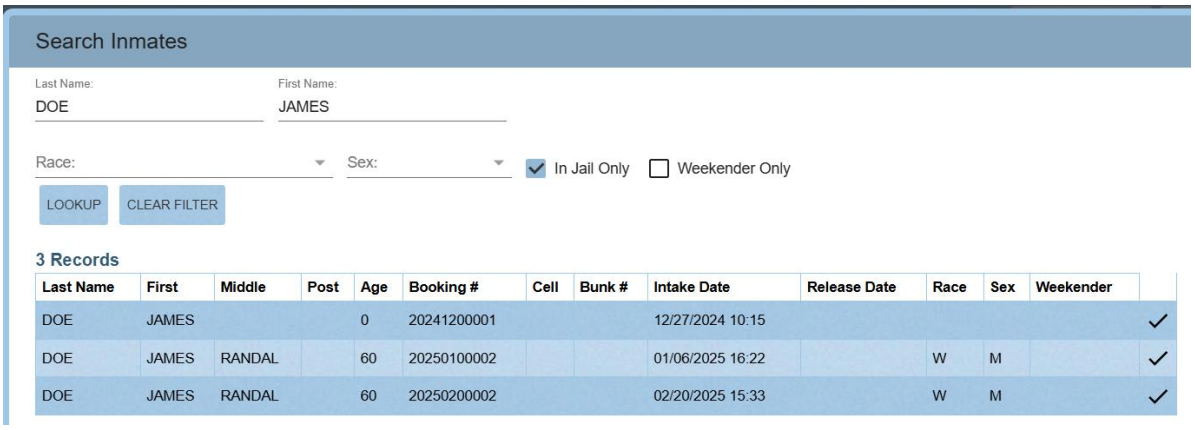
The **Mail Log** module also allows you to create mail records here. Navigate to the search screen and click **New Mail** in the upper right.



This will open a search box. Type the name of the inmate and a search box will open, or click the magnifying glass and you can find an inmate to add a mail record for. You can also tell iSOMS to use the default City/State/ZIP for this new entry.



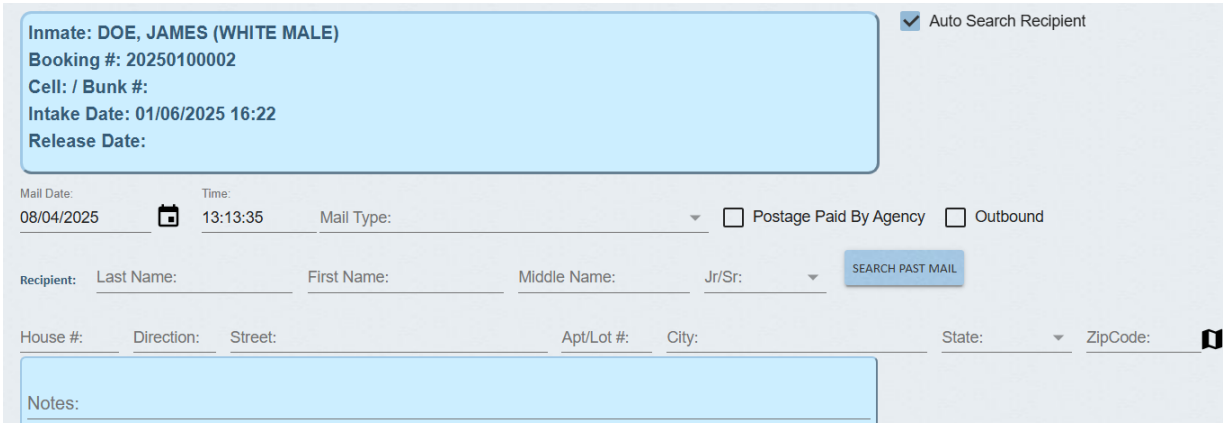
Add name or other search parameters and click **Lookup.** Click the checkmark symbol (✓) to select the inmate for the mail record. Then click **ADD** to create a new mail record.





There are two primary sections of the report:

1. The *fields* in the upper part of the screen. These record details about the inmate, the mail, and brief notes.



2. The *tabs* record information about other mail and any attachments for this record.



You can view **Mail History**. If attachments are needed, you can add them in the **Attachments** tab. This process is covered in detail in the next section, *Filling Out an Mail Record.*

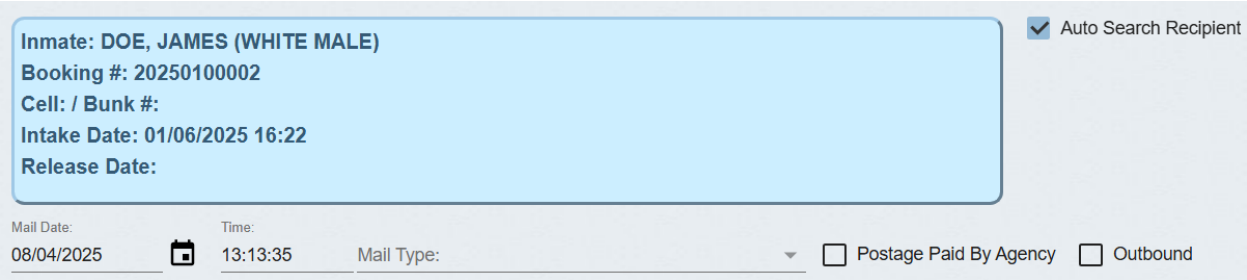
After you enter new details, make sure to click **Save** at the top of the screen.



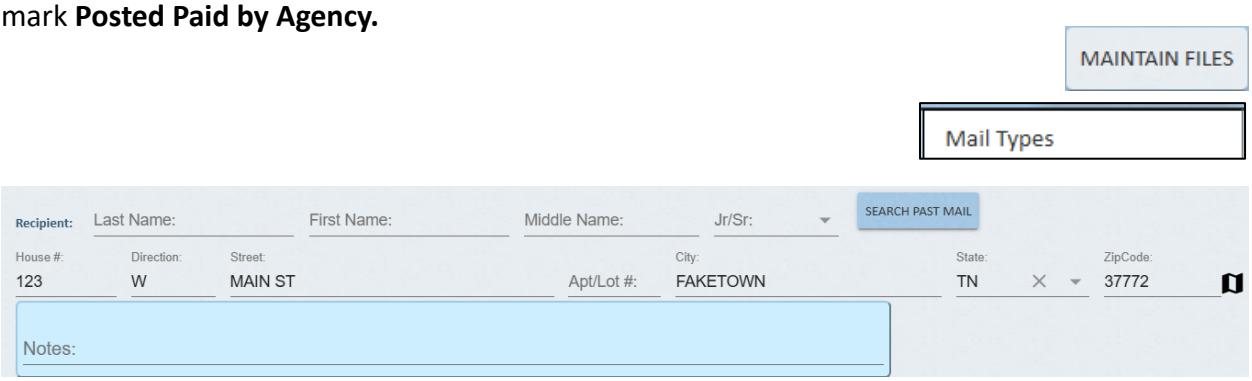
Filling Out an Mail Record – Fields

This section explains in detail the different fields and tabs for a Mail record. The top section of the report with fields should always be filled out when relevant information is available, and the tabs should be filled out as needed. Mail Records are very brief to fill in, so this is not a difficult or involved process.

Fields



The **Mail Date** and **Time** will automatically be set, but this may not be when mail was received, so change these fields if necessary. Then add the **Mail Type** (such as *Certified, Religious*, *Letter, Package*, etc. If the mail is outbound, mark **Outbound.** If the postage is paid by your agency, mark **Posted Paid by Agency.**



Now add address details in these fields and any **Notes** on the mail itself.

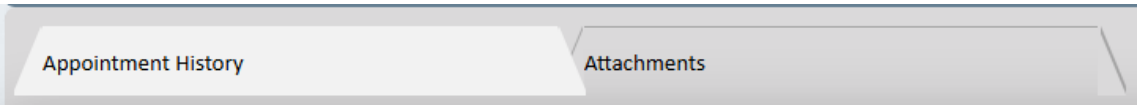
Filling Out an Mail Log Record – Tabs

Summary

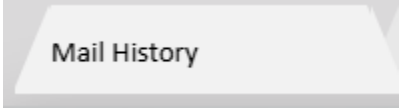
Usually, you don't have to add anything to the tabs for mail log, but the two available are shown below.

The **Mail History** tab is a **read-only** tab and shows all other mail for the inmate.

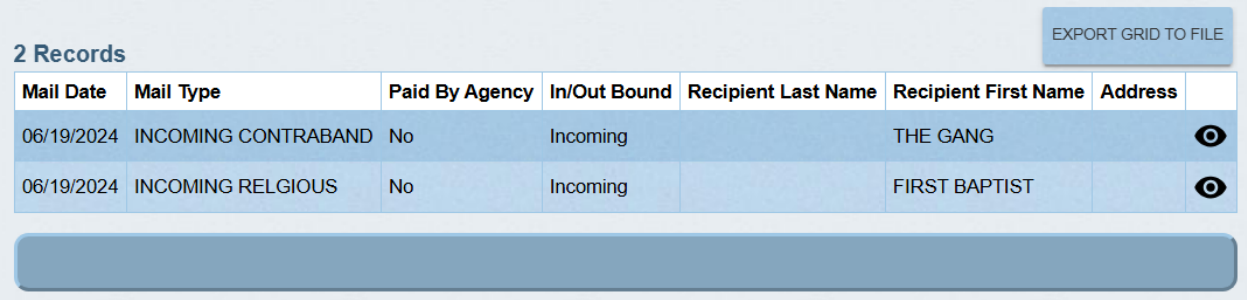
The **Attachments** tab allows you to attach files to this mail log record.



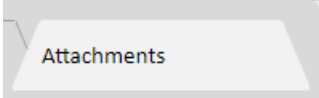
Mail History Tab



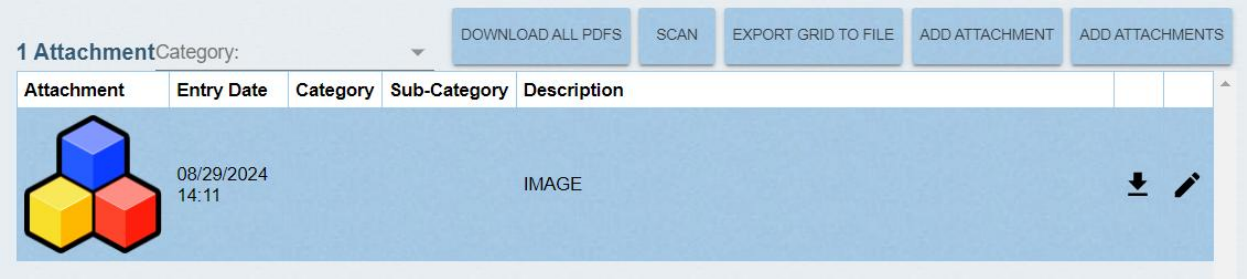
The **Mail History** tab is a **read-only** tab. It shows a list of all other mail the inmate has had. If you want to open the mail record, simply double-click it on the table or click the View Icon ( ) to open it.



Attachments Tab



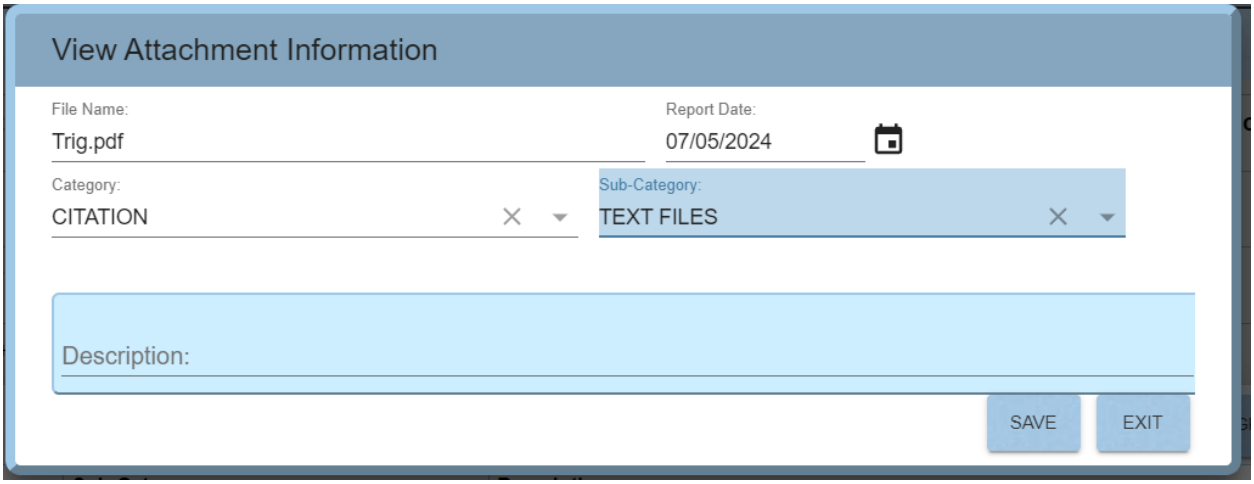
The **Attachments** tab is used to view, download, or add attachments. Double-click a file entry to view the record for the attachment or click on the icon to download the attachment to the computer.



You can add a single attachment at a time or multiple attachments at a time. Just like above with images, you will need the System Tray Installer downloaded to the computer you are using to add multiple attachments at once. See the *Image* tab instructions on the previous few pages for instructions on installing the System Tray Installer.

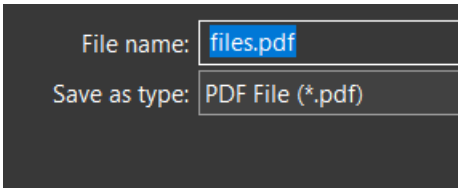
Click **Add Attachment** to add a single attachment or click **Add Attachments** to add multiple attachments at the same time. Choose the attachments from the computer, then add the appropriate category and sub-category for the file.



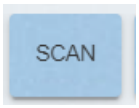


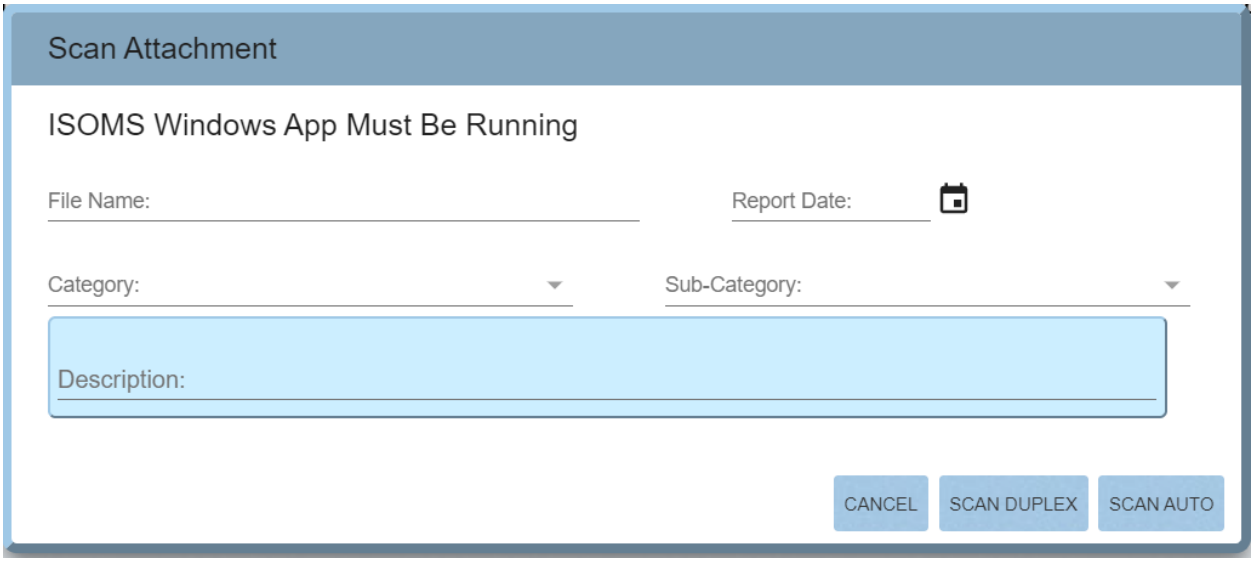
You can also **Download All PDFs** at once by clicking the appropriate button.





If you have the iSOMS Windows App, you can use **Scan** to scan files into the attachments.

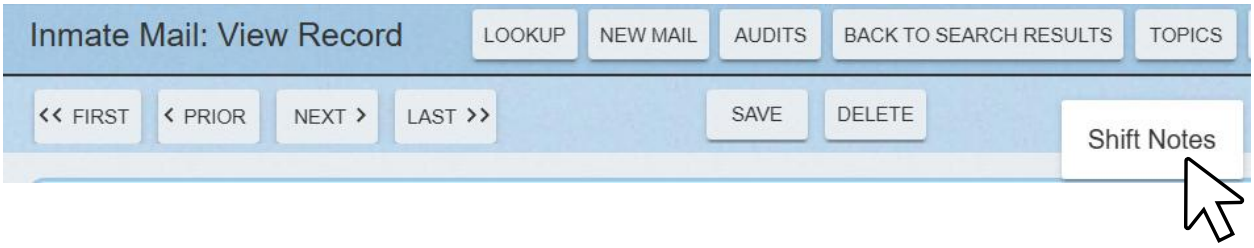




Mail Log Topics

The **Topics** button lets you do special actions in different modules. In **Mail Log**, if you use the **Topics** button, you will be able to quickly open the **Shift Notes** module right from here.

Once you have opened the **Mail Log** module, you can click **TOPICS → SHIFT NOTES** in the upper right.



This will open the **Shift Notes** module. If you want more information on the **Shift Notes** module, please see *Shift Notes* on page 275.

Mail Log Reports

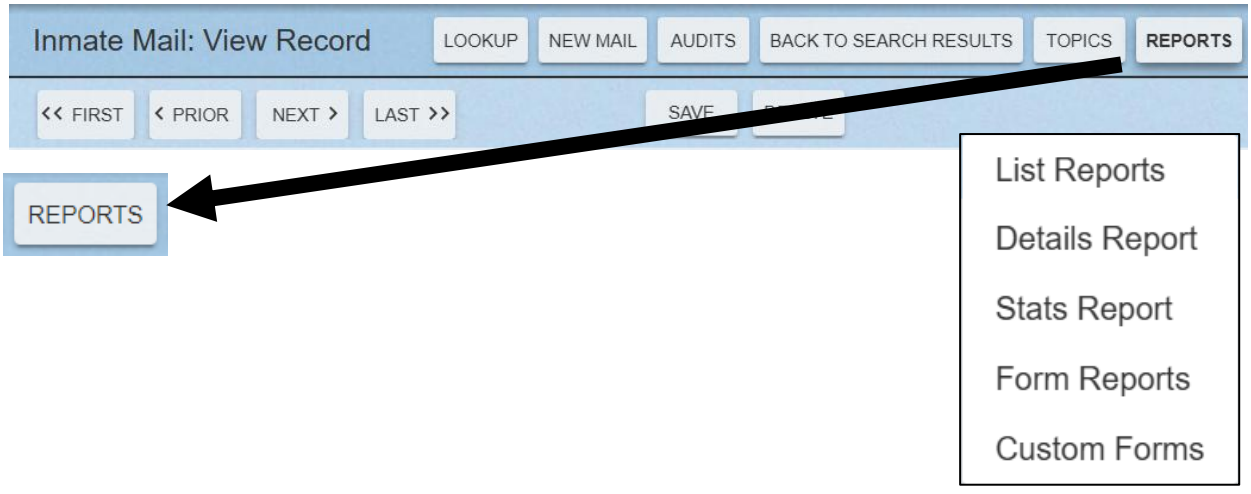
iSOMS has the capability to allow you to print different types of reports for mail records.

To access the reports, begin on the iSOMS home screen. Navigate to:

Corrections → Inmate Tracking → Mail Log

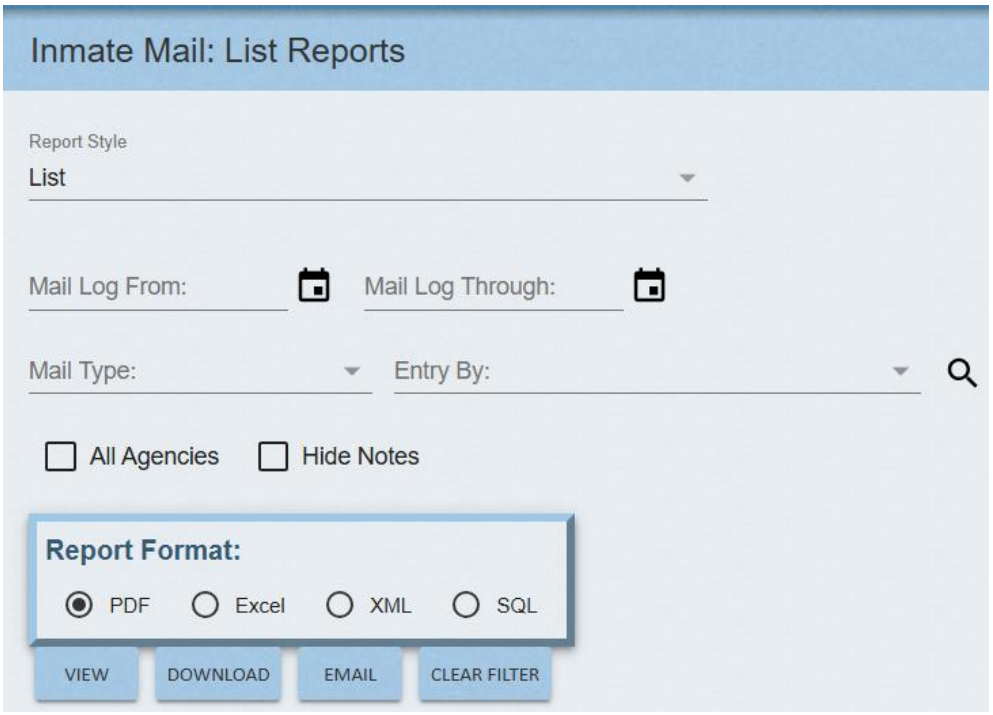


Now click on the **Reports** button in the upper right corner and select the report you wish to run. Different reports are explained over the next set of pages.



List Reports

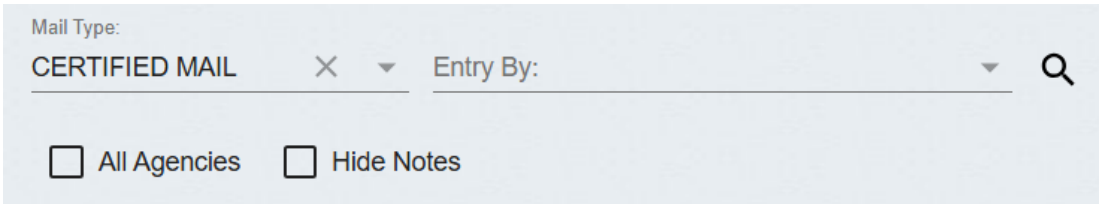
The **List Report** displays Mail records in iSOMS over a certain date range. In this way you can see a list of mail over your chosen time period. Add the start and end date in **Mail Log From** and **Mail Log Through.**



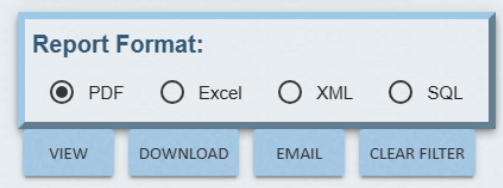
Report Style has a couple of different layout and sorting options, such as *List* and *Group by Mail Type*. Pick the one most relevant to your desired result.



You can filter to mail type and person who entered the mail, as well as hide notes on the mail records if necessary.



Now, with your chosen parameters, click **View** or **Download** to view the report.



List Report

YOUR AGENCY

Inmate Mail Log

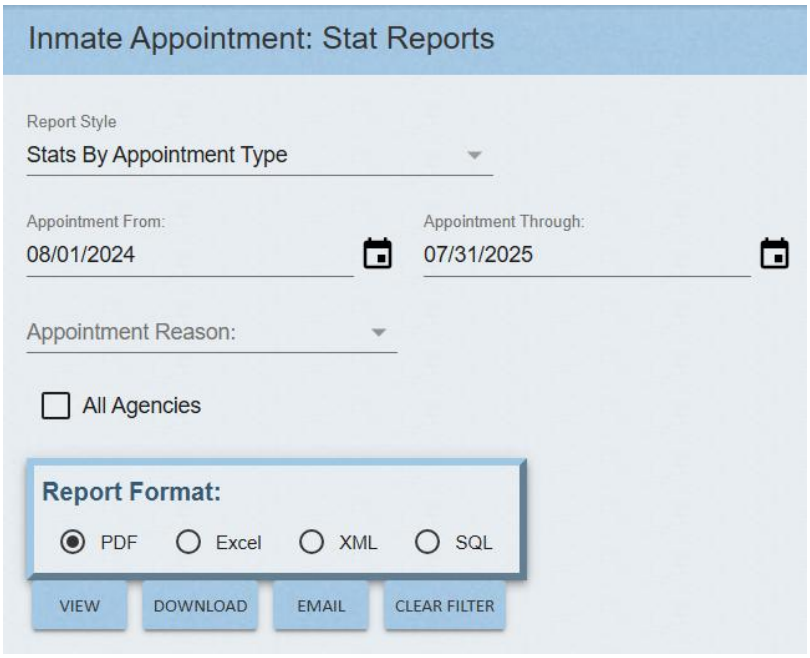
Page 1 of 1

Inmate Name	Booking #	Master ID#	Mail Date/Time	Mail Type
ELDER, MARTIN WILLIAM JR ELDER, ALLISON 1905 HIGH PARK CIR MARYVILLE, TN 37803 *PICTURES*	20120012	3276	11/29/2014 10:55	INCOMING LETTER
ELDER, MARTIN WILLIAM JR ELDER, ALLISON 1905 HIGH PARK CIR MARYVILLE, TN 37803	20120012	3276	12/01/2014 10:59	INCOMING LETTER
ELDER, DERRICK LAMONT ELDER, ALLISON 1905 HIGH PARK CIR MARYVILLE, TN 37803	20120040	150752	01/10/2018 12:42	INCOMING LETTER
ELDER, DERRICK LAMONT ELDER, MALIA 101 MAIN ST MARYVILLE, TN 37804	20120040	150752	01/10/2018 12:42	INCOMING LETTER

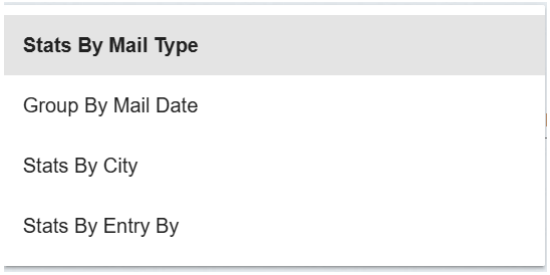
Report Count: **4**

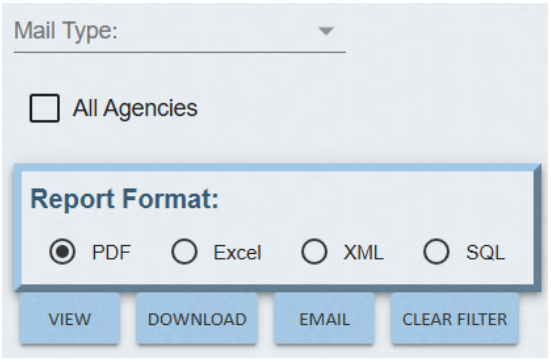
Stat Reports

This report displays mail stats in iSOMS over a certain date range. In this way you can see statistics for your records over a certain period. Add the start and end date in **Mail Log From** and **Mail Log Through.**



Report Style has a couple of different layout and sorting options, such as *Stats by Mail Type, Group by Mail Date, Stats by City,* and *Stats by Entry By*. Pick the one most relevant to your desired result.





You can add a filter to restrict by mail type if you wish. Now, with your chosen parameters, click **View** or **Download** to view the report.

YOUR AGENCY

Inmate Mail Log - Stats By Type

Report Dates From 01/01/2024 Through 08/05/2025

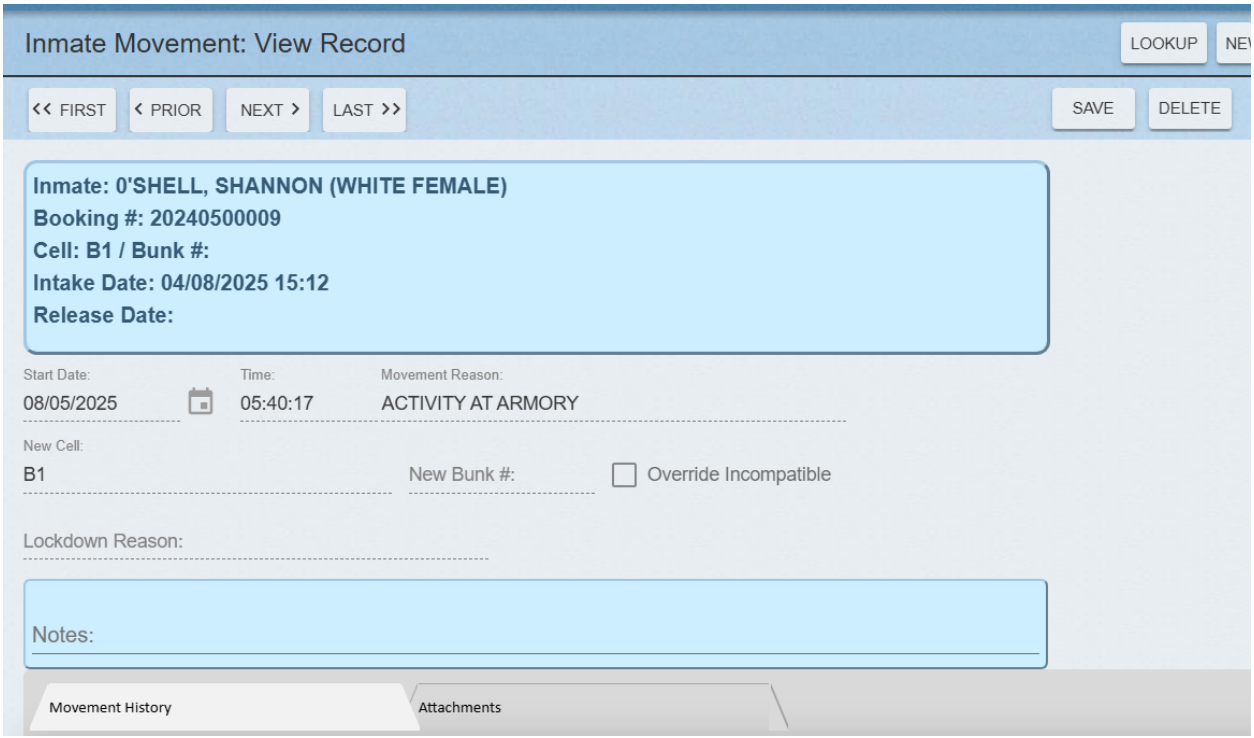
Page 1 of 1

Mail Type	Count	% To Total
CERTIFIED MAIL	1	14.29
INCOMING CONTRABAND	1	14.29
INCOMING RELGIOUS	1	14.29
	4	57.14

Report Count: **7**

Movements / Tracking

The **Movements / Tracking** module takes all the movements created in **Intake** / **Booking Records** and compiles them so you can see the movements of inmates easily. You can also run reports on movement records to get a list or statistics report.



The first part of this section explains searches. If you need explanations on an already existing record, see the *Filling Out a Movement Record* to get more information on the different fields and tabs available.

Searching for Existing Movement Records

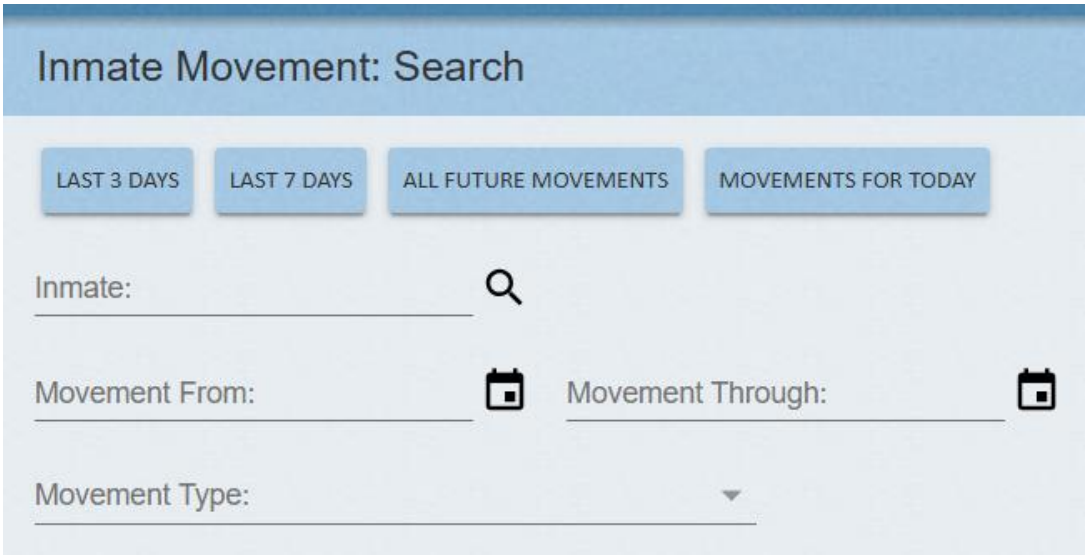
To search existing movement records, begin on the iSOMS home screen.

Navigate to:

Corrections → Inmate Tracking → Movements / Tracking



This will open the **Inmate Movement: Search** screen. Here you can search and filter for different movement records. You can either use the blue buttons to do *quick searches* or enter information in the fields to do *standard searches.*



Quick Searches

Several different quick searches are available by using the blue buttons.



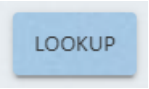
Last 3 Days and **Last 7 Days** will show you all the movement records in the specified recent time periods.



To see every upcoming movement, simply click **All Future Movements.** To see today's movements for all inmates, click **Movements for Today.**

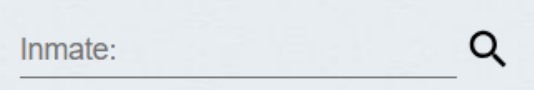
Standard Searches

Various fields are available if you need to do a search that the quick searches won't work for. Fill in the fields to narrow the search and click **Lookup** at the top or bottom of the page to perform the search. If you need to start over, simply click **Clear Filter** to remove all search field entries.

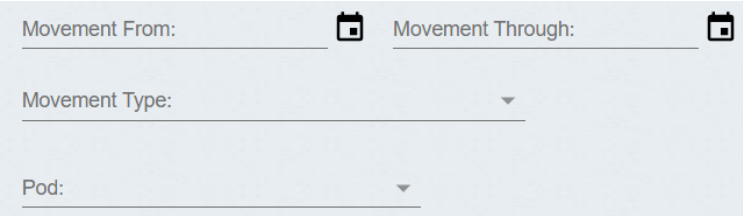




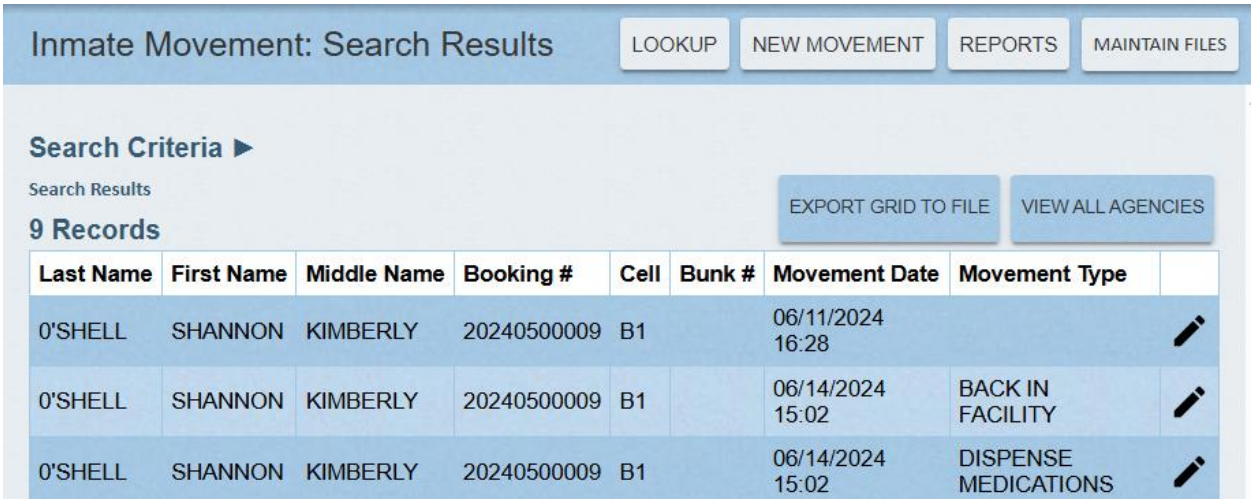
Field Explanations



This field, **Inmate**, lets you search for a specific inmate's records. Just type their name and a search box will open, or click the magnifying glass and you can find an inmate to search for just their movement records.



Use these fields to narrow the search by date range, movement type, or pod. Use **Movement From** and **Movement Through** to search between the dates selected. Add a **Movement Type** to only show that movement type on the search. You can also add the **Pod** as well.



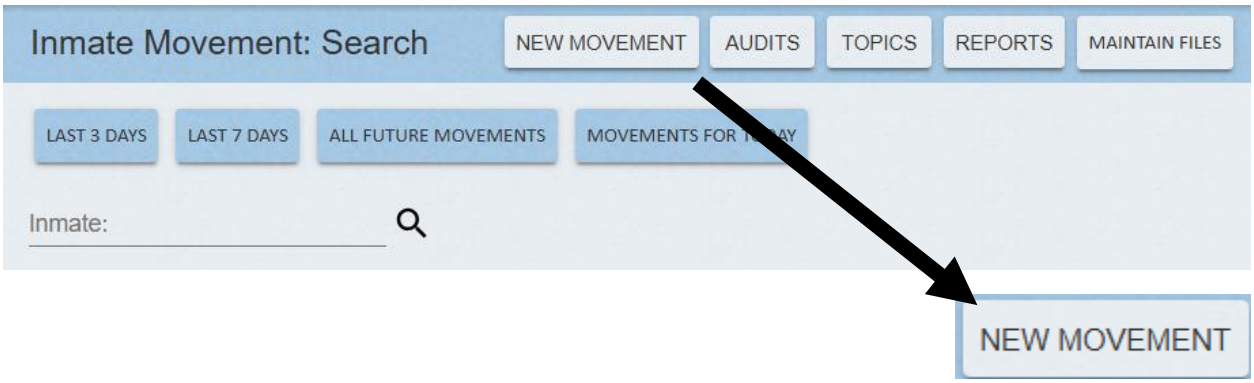
Last Name	First Name	Middle Name	Booking #	Cell	Bunk #	Movement Date	Movement Type	
0'SHELL	SHANNON	KIMBERLY	20240500009	B1		06/11/2024 16:28		
0'SHELL	SHANNON	KIMBERLY	20240500009	B1		06/14/2024 15:02	BACK IN FACILITY	
0'SHELL	SHANNON	KIMBERLY	20240500009	B1		06/14/2024 15:02	DISPENSE MEDICATIONS	

As mentioned above, when you have finished with your search parameters, click **Lookup** to perform your search. Double click on the desired entry to view, edit, or delete the record.

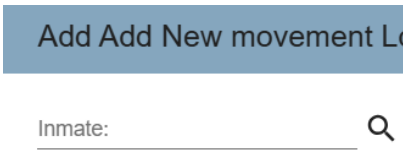
Creating a New Movement Record

Typically, movement records are created on an inmate's booking record under the **Movement** tab. See page 123 for more information on how to add movement records under that tab.

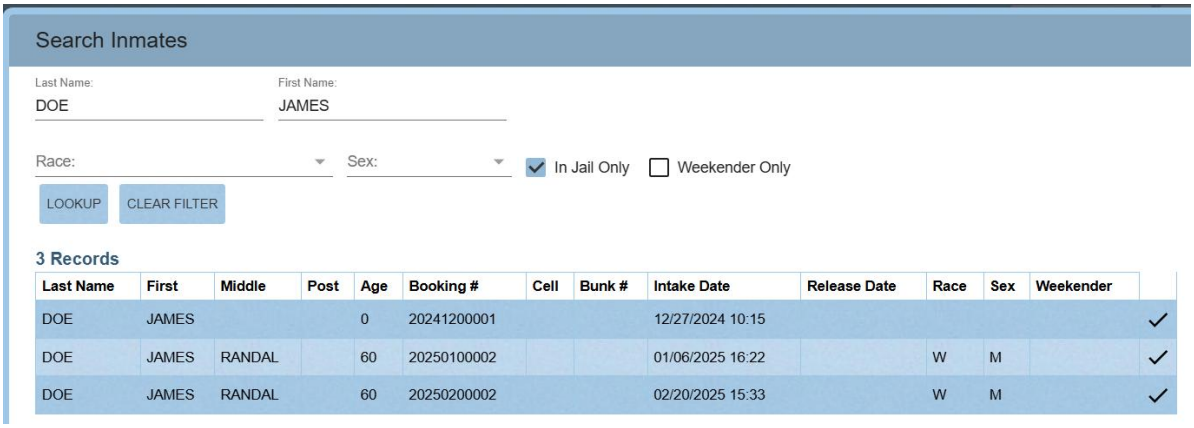
The **Movement / Tracking** module also allows you to create movement records here. **One thing important to remember is that once you save a movement record, it cannot be modified for the most part, only deleted.** Navigate to the search screen and click **New Movement** in the upper right.



This will open a search box. Type the name of the inmate and a search box will open, or click the magnifying glass and you can find an inmate to add a movement record for.



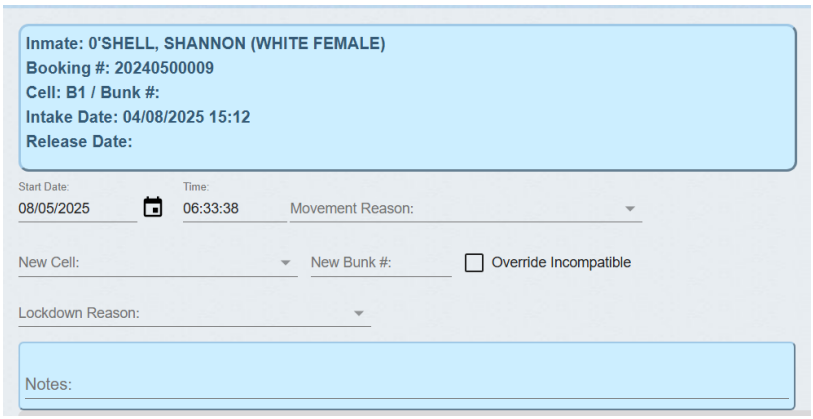
Add name or other search parameters and click **Lookup.** Click the checkmark symbol (✓) to select the inmate for the movement record. Then click **ADD** to create a new record.





There are two primary sections of the report:

1. The *fields* in the upper part of the screen. These record details about the inmate, the movement, and brief notes.



2. The *tabs* record information about other movements and any attachments for this record.



You can view **Movement History** to see other movements. If attachments are needed, you can add them in the **Attachments** tab. This process is covered in detail in the next section, *Filling Out an Movement Record.*

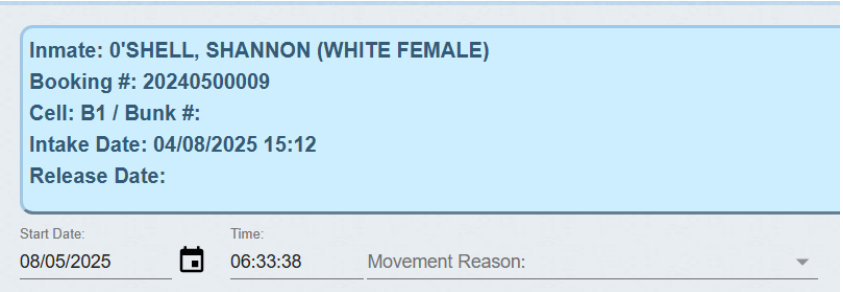


After you enter new details, make sure **NOT** to click **Save** at the top of the screen until you finish as saving will **LOCK** most of the record.

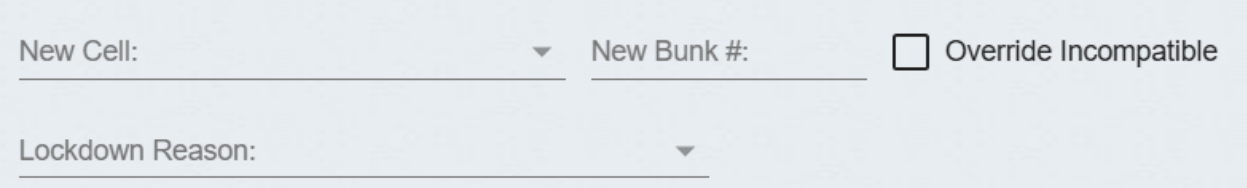
Filling Out an Movement Record – Fields

This section explains in detail the different fields and tabs for a movement record. The top section of the report with fields should always be filled out when relevant information is available, and the tabs should be filled out as needed. Movement Records are very brief to fill in, so this is not a difficult or involved process.

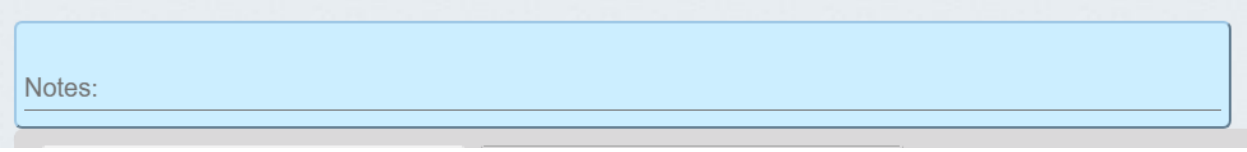
Fields



The **State Date** and **Time** will automatically be set, but this may not be when movement, so change these fields if necessary. Then add the **Movement Reason** (such as *Fire Drill, Visitor, Cell Assignment*).



Now, in these fields, add which **New Cell, New Bunk #,** and if a lockdown, a **Lockdown Reason.** Only check **Override Incompatible** if you are **SURE** this will not cause an issue of putting two incompatibles in the same cell.



You can add any notes here as desired.

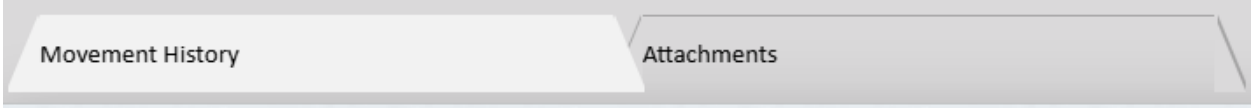
Filling Out an Movement Record – Tabs

Summary

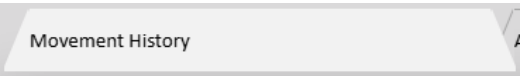
Usually, you don't have to add anything to the tabs for movement, but the two available are shown below.

The **Movement History** tab is a **read-only** tab and shows all other movements for the inmate.

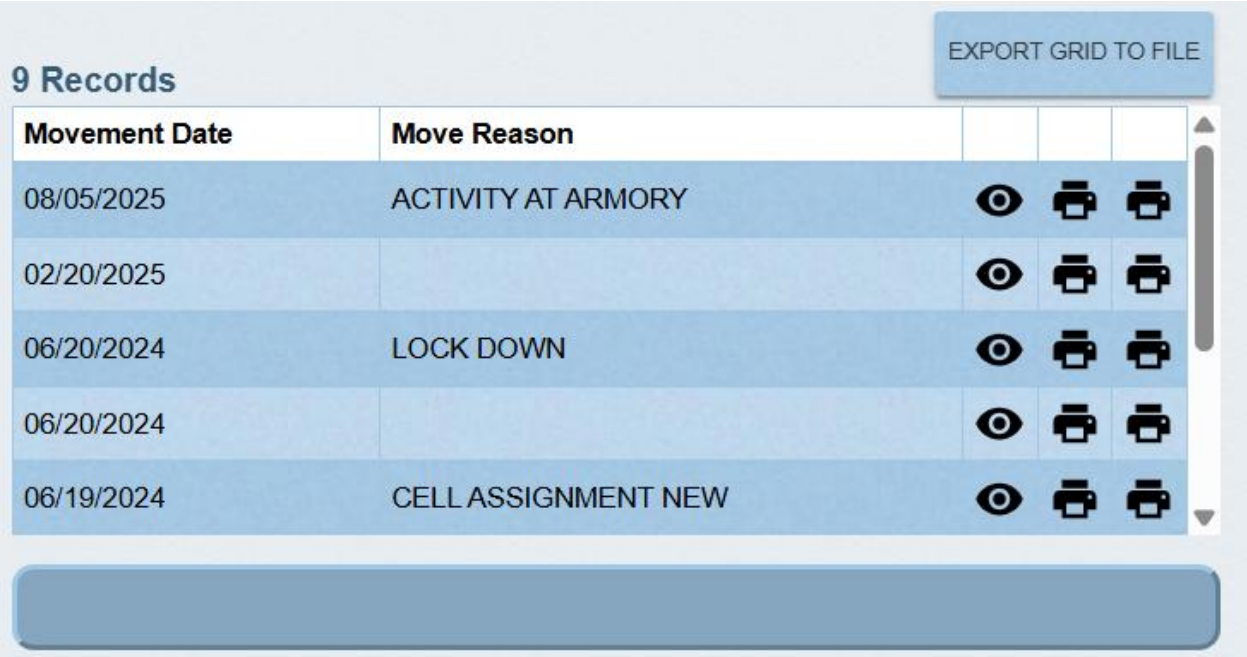
The **Attachments** tab allows you to attach files to this movement record.



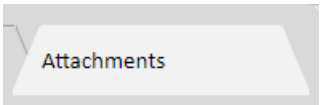
Movement History Tab



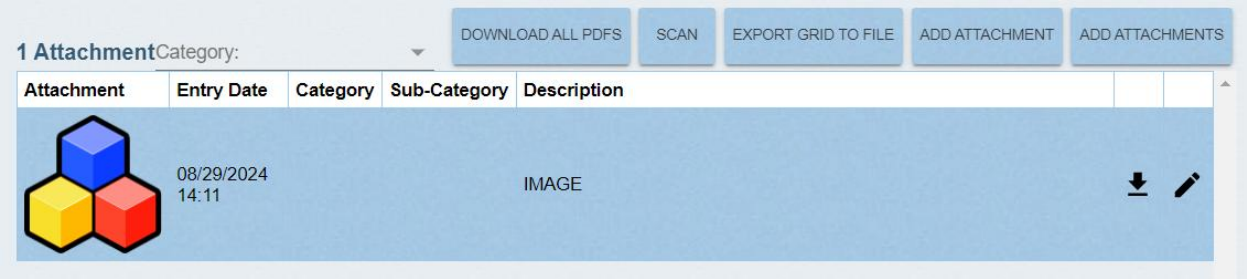
The **Movement History** tab is a **read-only** tab. It shows a list of all other movement of the inmate. If you want to open the movement record, simply double-click it on the table or click the View Icon () to open it.



Attachments Tab



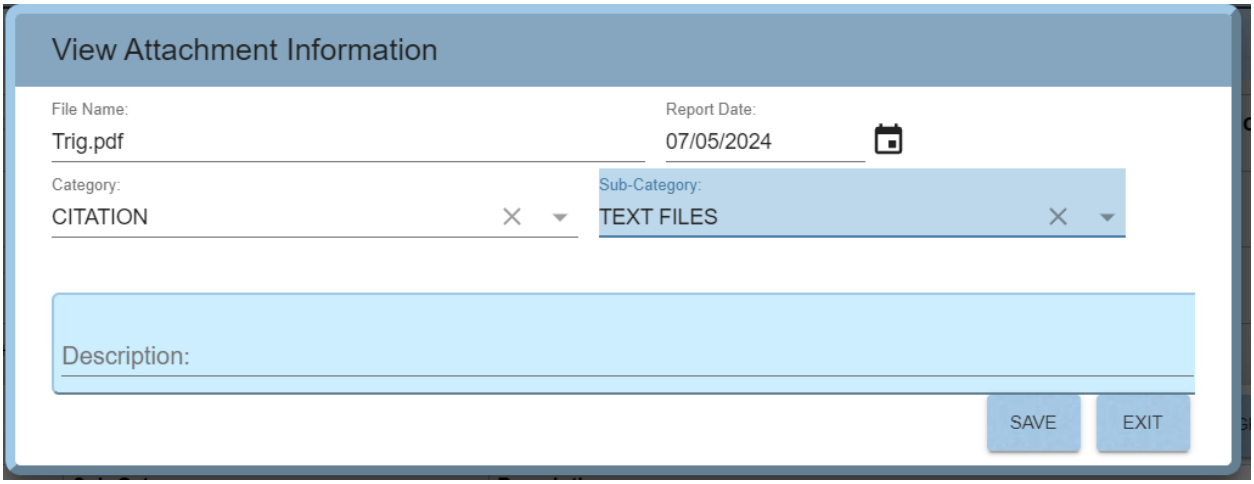
The **Attachments** tab is used to view, download, or add attachments. Double-click a file entry to view the record for the attachment or click on the icon to download the attachment to the computer.



You can add a single attachment at a time or multiple attachments at a time. Just like above with images, you will need the System Tray Installer downloaded to the computer you are using to add multiple attachments at once. See the *Image* tab instructions on the previous few pages for instructions on installing the System Tray Installer.

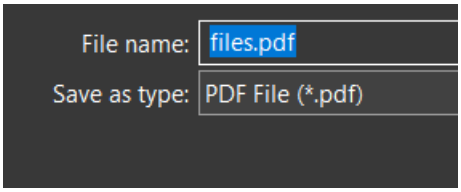
Click **Add Attachment** to add a single attachment or click **Add Attachments** to add multiple attachments at the same time. Choose the attachments from the computer, then add the appropriate category and sub-category for the file.



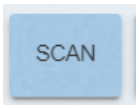


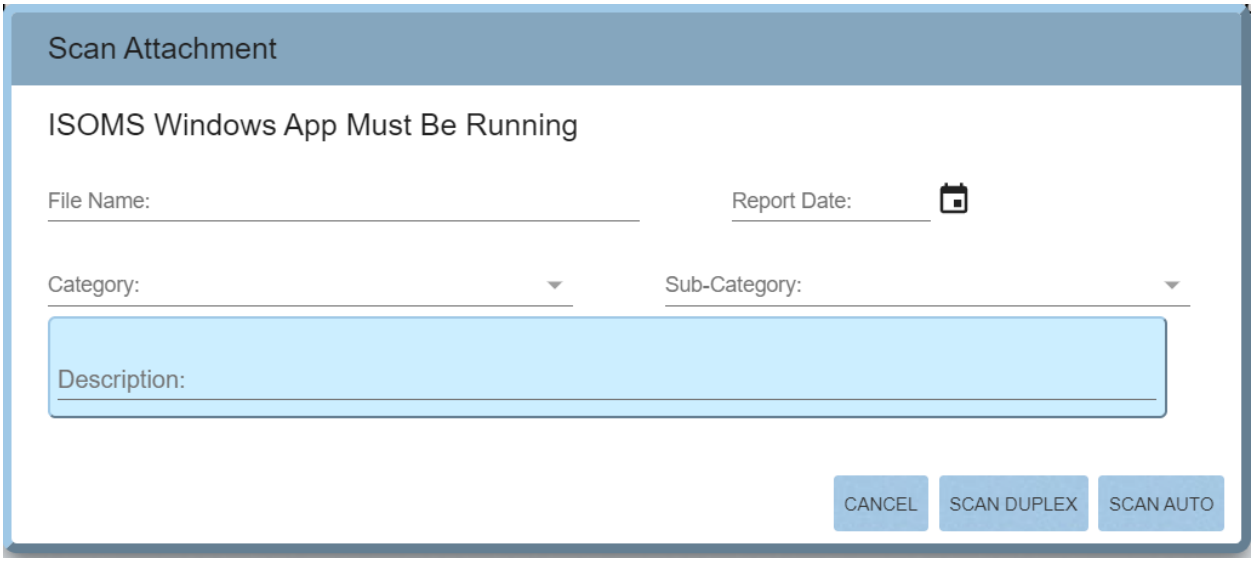
You can also **Download All PDFs** at once by clicking the appropriate button.





If you have the iSOMS Windows App, you can use **Scan** to scan files into the attachments.

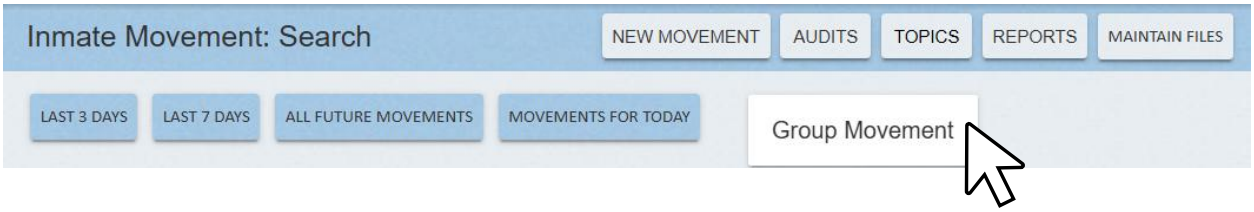




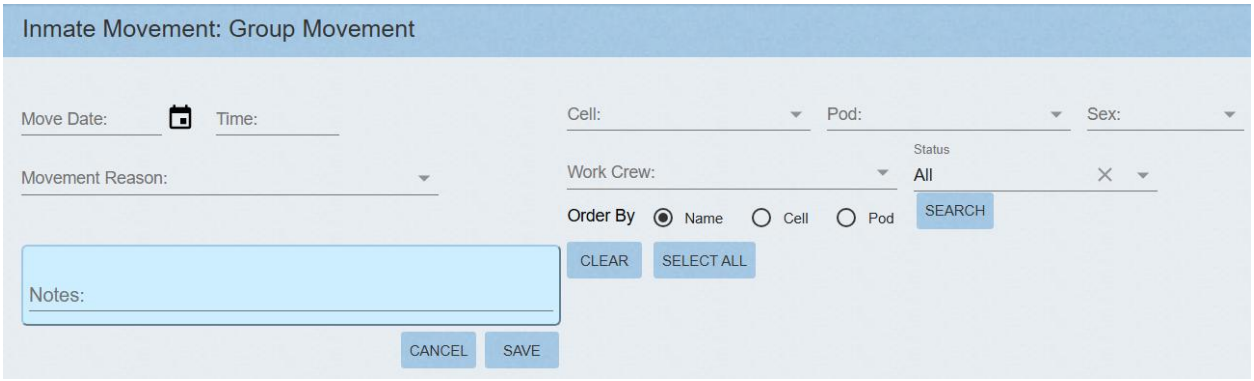
Movement Topics

The **Topics** button lets you do special actions in different modules. In **Movement / Tracking**, if you use the **Topics** button, you will be able to perform group movement to move a group of people. Note it does not change their location – it only adds a movement reason. So you will not be adding a new cell / bunk but just a movement reason.

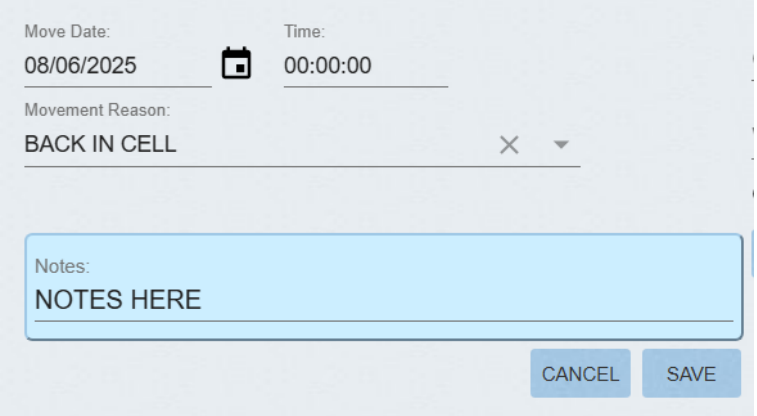
Once you have opened the **Movement** module, you can click **TOPICS → GROUP MOVEMENTS** in the upper right.



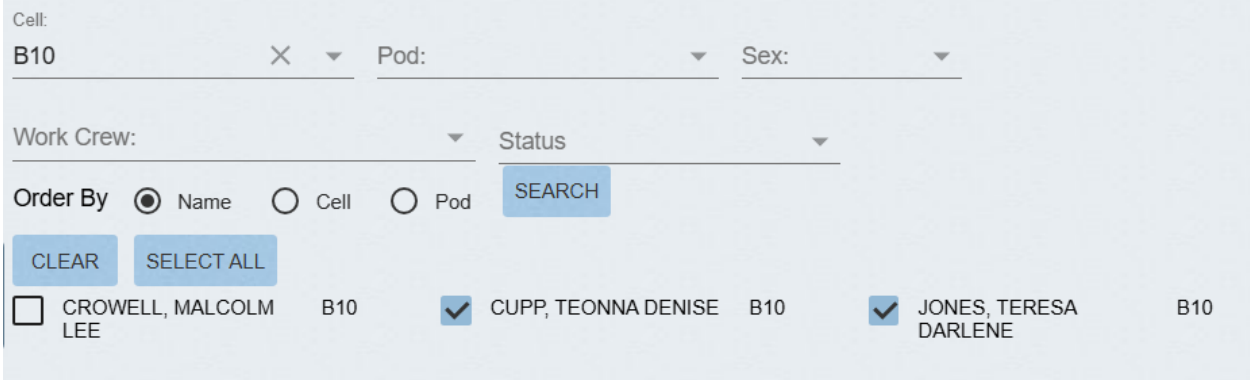
This will open the **Group Movement** screen. Fill out the information to perform a group movement.



First, add the information about the movement: add the **Move Date** and **Time,** the **Movement Reason,** and any **Notes.**



Now use the other fields to search for people and click **Search.** Select who is to be moved and then hit **Save** on the left side of the screen. Movement records will be created with this info.



Movement Reports

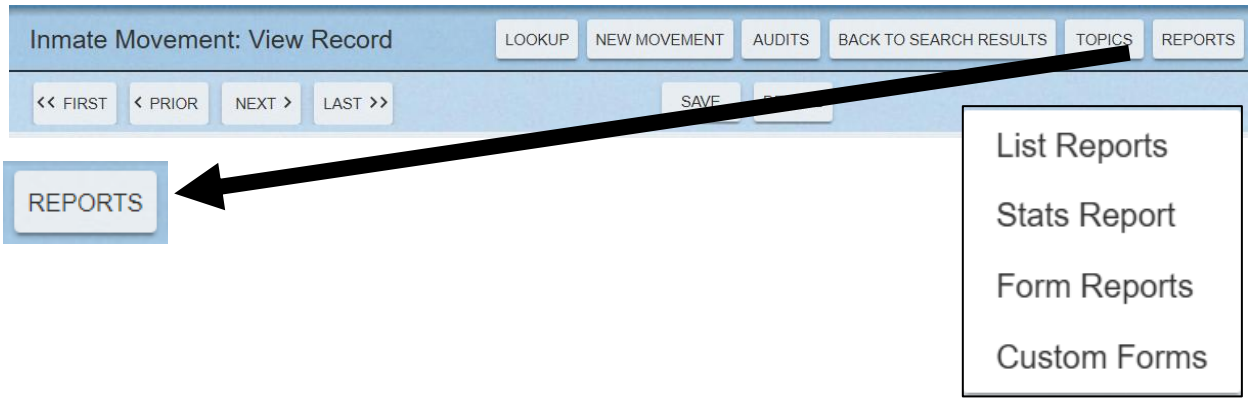
iSOMS has the capability to allow you to print different types of reports for movement records.

To access the reports, begin on the iSOMS home screen. Navigate to:

Corrections → Inmate Tracking → Movements / Tracking

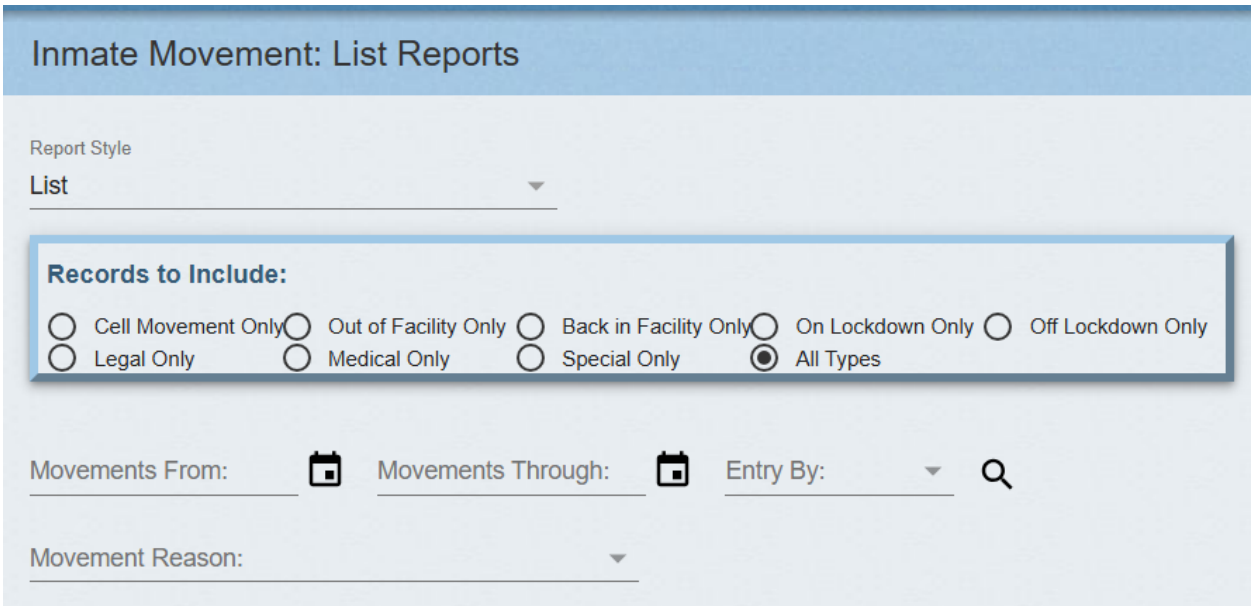


Now click on the **Reports** button in the upper right corner and select the report you wish to run. Different reports are explained over the next set of pages.



List Reports

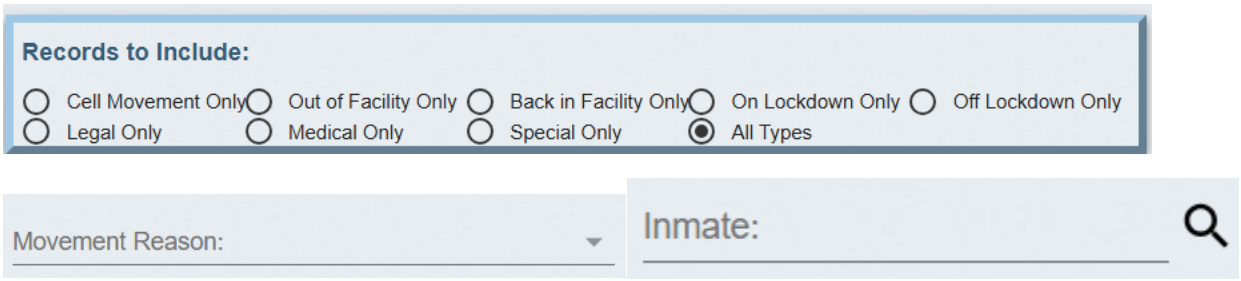
The **List Report** displays Movement records in iSOMS over a certain date range. In this way you can see a list of movements over chosen periods. Add the start and end date in **Movements From** and **Movements Through.**



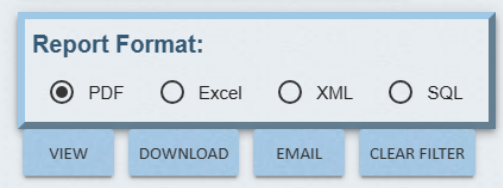
Report Style has a couple of different layout and sorting options, such as *List, Group by Movement Reason* and *Group by Employee*. Pick the one most relevant to your desired result.



You can filter to certain movement reason types, either using the radio buttons or the filters. You can also choose a certain inmate to see their movements



Now, with your chosen parameters, click **View** or **Download** to view the report.



List Report

YOUR AGENCY

Inmate Movement/Tracking List

Movement Dates From 08/01/2025 Through 08/07/2025

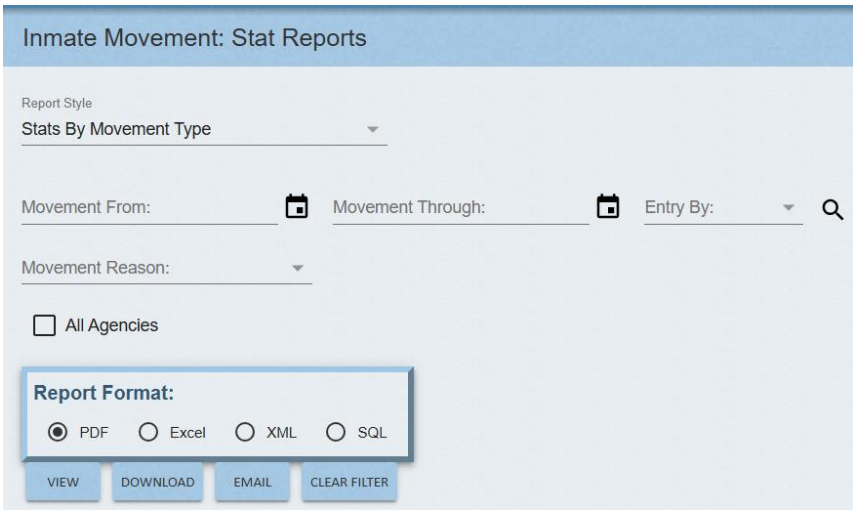
Page 1 of 1

Date	Move By	Reason	Inmate	Old Cell	New Cell	Booking #
08/05/2025 00:00		BACK IN CELL		AA1		2019060090
08/05/2025 00:00		BACK IN CELL		AA1		20191000005
08/05/2025 05:40		ACTIVITY AT ARMORY		B6	B1	20240500009
08/05/2025 06:33		_Missing Reason Code		B1		20240500009
08/06/2025 00:00		BACK IN CELL		B10		2006007229
08/06/2025 00:00		BACK IN CELL		B10		13961
08/06/2025 00:00		BACK IN CELL		B10		2017120001

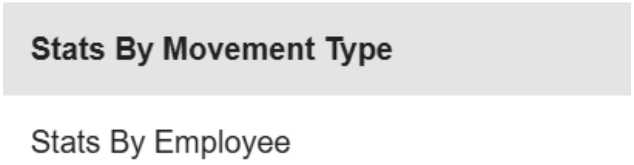
Report Count: **7**

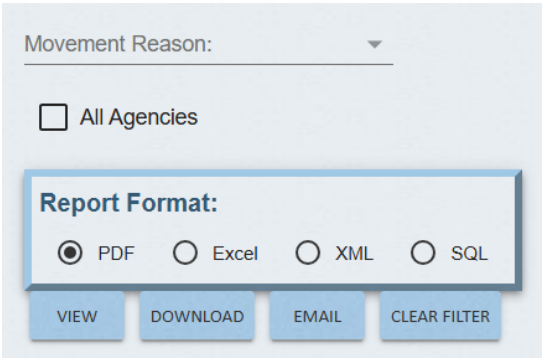
Stat Reports

This report displays movement stats in iSOMS over a certain date range. In this way you can see statistics for your records over a certain period. Add the start and end date in **Movement From** and **Movement Through.**



Report Style has a couple of different layout and sorting options, such as *Stats by Movement Type* and *Stats by Employee*. Pick the one most relevant to your desired result.





You can add a filter to restrict by movement type if you wish. Now, with your chosen parameters, click **View** or **Download** to view the report.

YOUR AGENCY

Inmate Movement/Tracking Stats (By Reason)

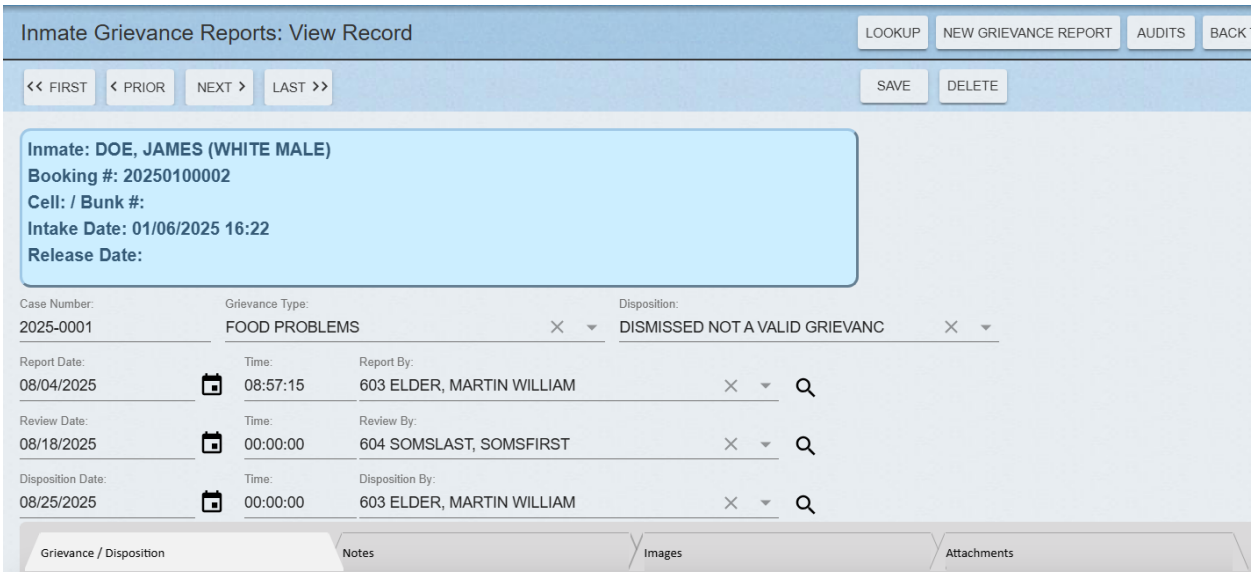
Report Dates From 08/01/2025 Through 08/08/2025

Tracking / Movement Reason	Count	% To Total
ACTIVITY AT ARMORY	1	14.29
BACK IN CELL	5	71.43
No Movement Reason	1	14.29

Report Count: **7**

Grievance Reports

The **Grievance Reports** module takes all the grievance reports created in **Intake** / **Booking Records** and compiles them so you can see the grievances of all inmates or search for a specific inmate's grievances. You can also run reports on these records to get a list, details on a specific inmate and their grievance, or statistics of the records.



The first part of this section explains searches. If you need explanations on an already existing record, see the *Filling Out a Grievance Record* to get more information on the different fields and tabs available.

Searching for Existing Grievance Records

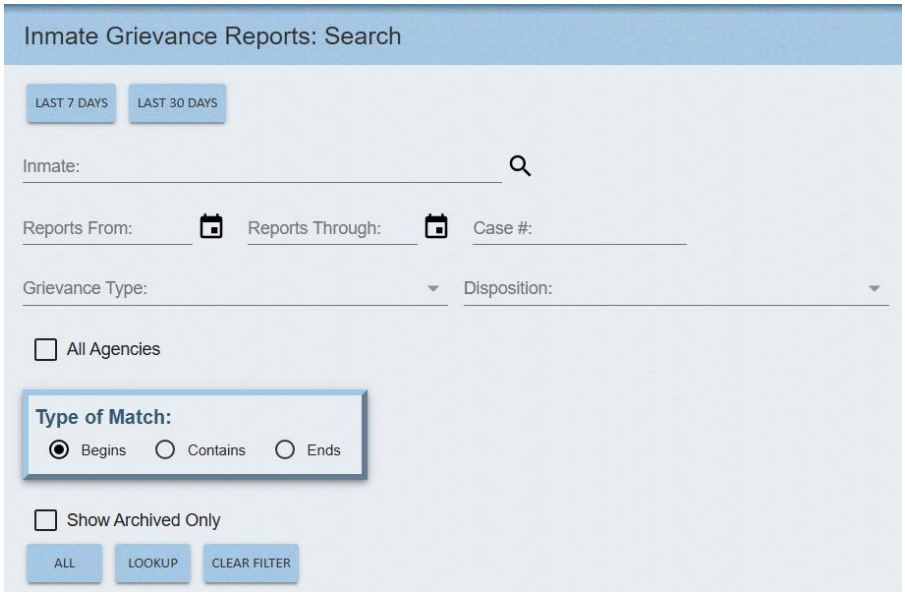
To search existing grievance records, begin on the iSOMS home screen.

Navigate to:

Corrections → Inmate Tracking → Grievance Reports

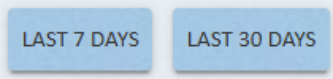


This will open the **Inmate Grievance Reports: Search** screen. Here you can search and filter for different grievance records. You can either use the blue buttons to do *quick searches* or enter information in the fields to do *standard searches.*



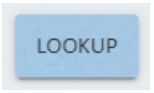
Quick Searches

A few different quick searches are available by using the blue buttons.



Last 7 Days and **Last 30 Days** will show you all the records in the specified recent time periods.

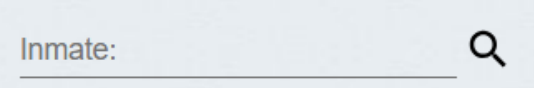
Standard Searches



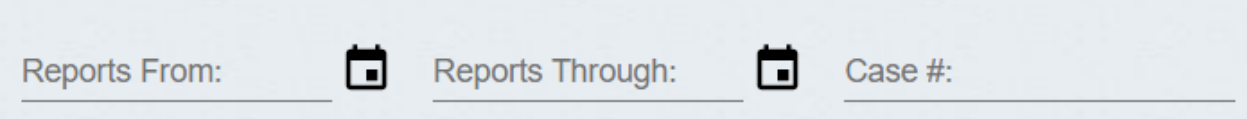


Various fields are available if you need to do a search that the quick searches won't work for. Fill in the fields to narrow the search and click **Lookup** at the top or bottom of the page to perform the search. If you need to start over, simply click **Clear Filter** to remove all search field entries.

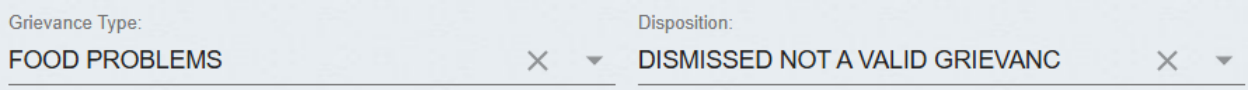
Field Explanations



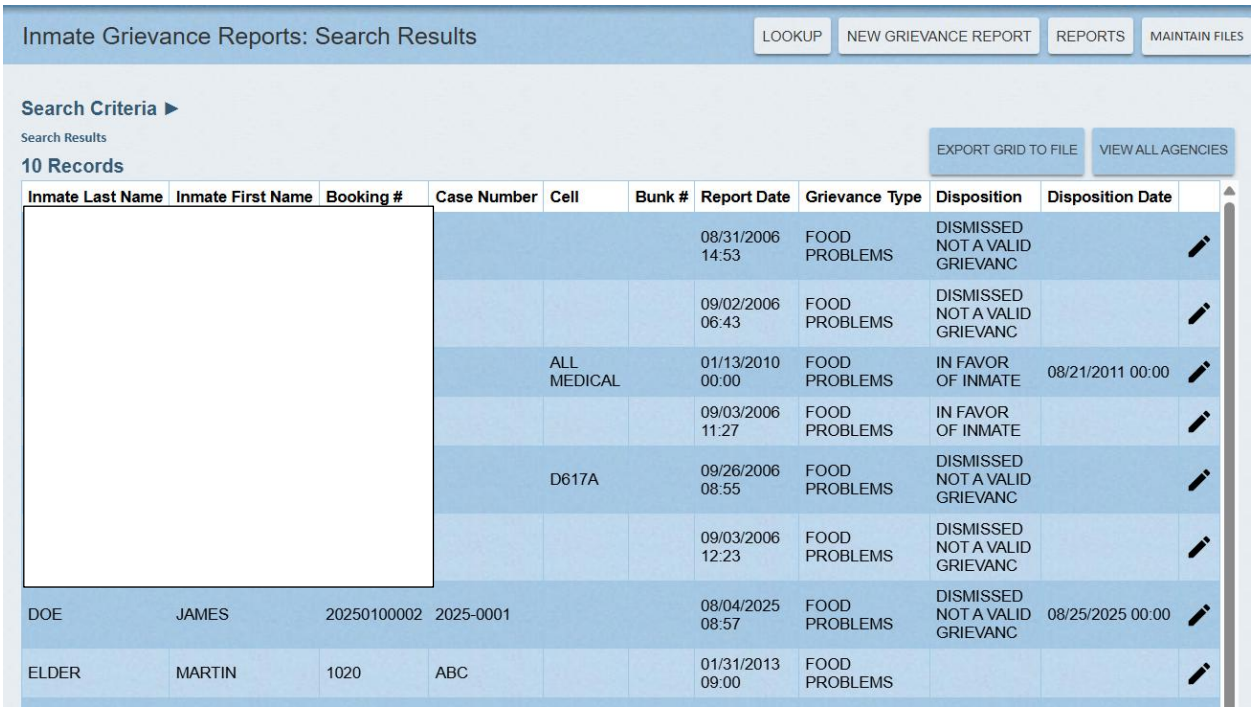
This field, **Inmate**, lets you search for a specific inmate's records. Just type their name and a search box will open, or click the magnifying glass and you can find an inmate to search for just their grievance records.



Use these fields to narrow the search by date range or a specific case number (use *Type of Match* if you need to do a number search for numbers that *contain* or *end* instead of *begin* with what you enter). Use **Reports From** and **Reports Through** to search between the dates selected. Use **Case #** to search the case number field, such as *2024-00* to show the first reports in 2024, or another entry if you use a manual numbering system.



Grievance Type lets you categorize grievance reports so you can search by type here. **Disposition** is for the general disposition type, not a specific action. Search by disposition type here, and then you can add details on the disposition on the actual report in the disposition notes box.



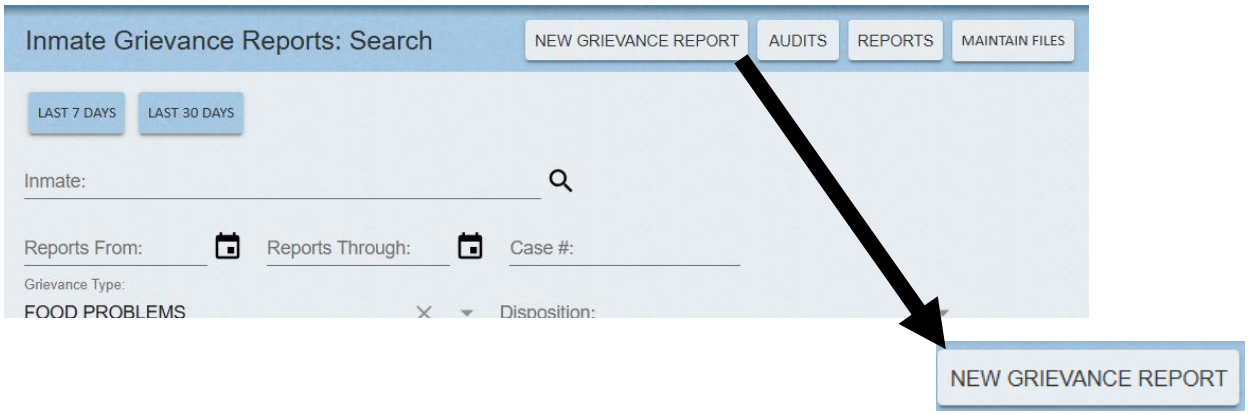
Inmate Last Name	Inmate First Name	Booking #	Case Number	Cell	Bunk #	Report Date	Grievance Type	Disposition	Disposition Date
						08/31/2006 14:53	FOOD PROBLEMS	DISMISSED NOT A VALID GRIEVANC	
						09/02/2006 06:43	FOOD PROBLEMS	DISMISSED NOT A VALID GRIEVANC	
				ALL MEDICAL		01/13/2010 00:00	FOOD PROBLEMS	IN FAVOR OF INMATE	08/21/2011 00:00
						09/03/2006 11:27	FOOD PROBLEMS	IN FAVOR OF INMATE	
				D617A		09/26/2006 08:55	FOOD PROBLEMS	DISMISSED NOT A VALID GRIEVANC	
						09/03/2006 12:23	FOOD PROBLEMS	DISMISSED NOT A VALID GRIEVANC	
DOE	JAMES	20250100002	2025-0001			08/04/2025 08:57	FOOD PROBLEMS	DISMISSED NOT A VALID GRIEVANC	08/25/2025 00:00
ELDER	MARTIN	1020	ABC			01/31/2013 09:00	FOOD PROBLEMS		

As mentioned above, when you have finished with your search parameters, click **Lookup** to perform your search. Double click on the desired entry to view, edit, or delete the record.

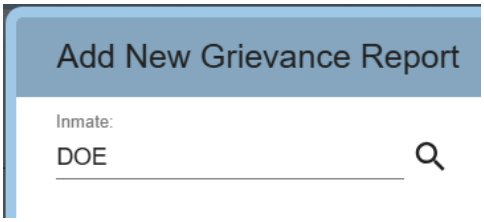
Creating a Grievance Record

Typically, grievance reports are created on an inmate's booking record under the **Grievance** tab. See page 158 for more information on how to add grievance records under that tab.

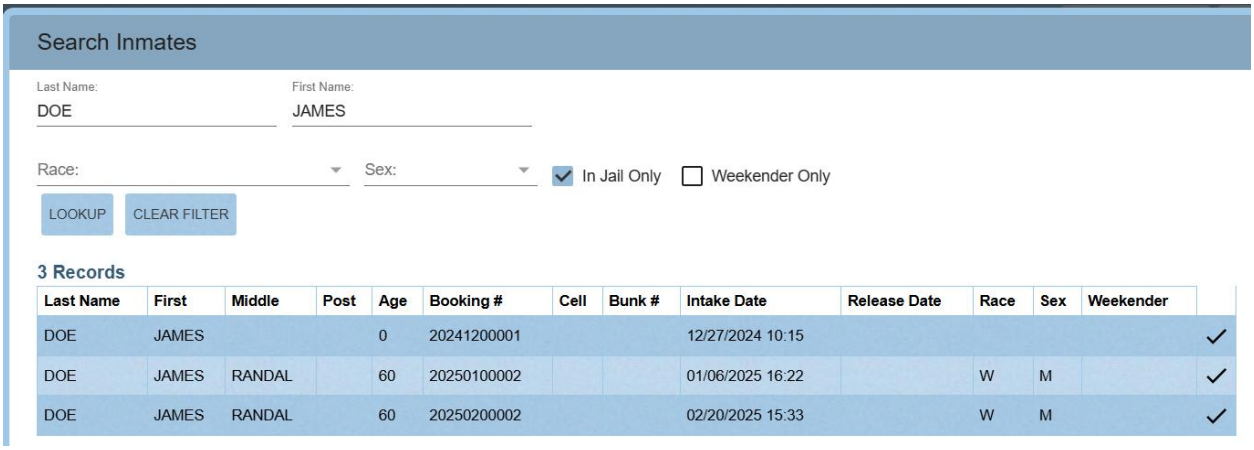
The **Grievance Reports** module also allows you to create records here. Navigate to the search screen and click **New Grievance Report** in the upper right.



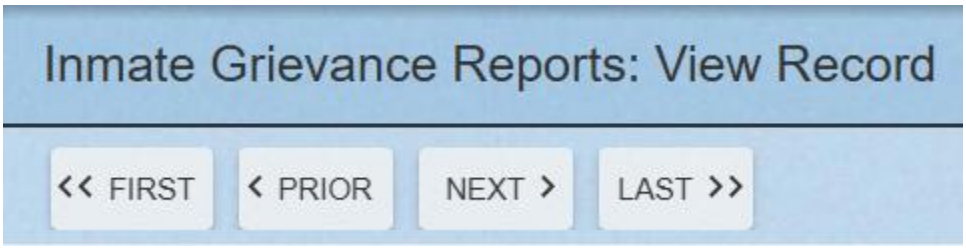
This will open a search box. Type the name of the inmate and a search box will open, or click the magnifying glass and you can find an inmate to add an grievance report for.



Add name or other search parameters and click **Lookup.** Click the checkmark symbol (✓) to select the inmate for the grievance record. Then click **ADD** to create a new record.

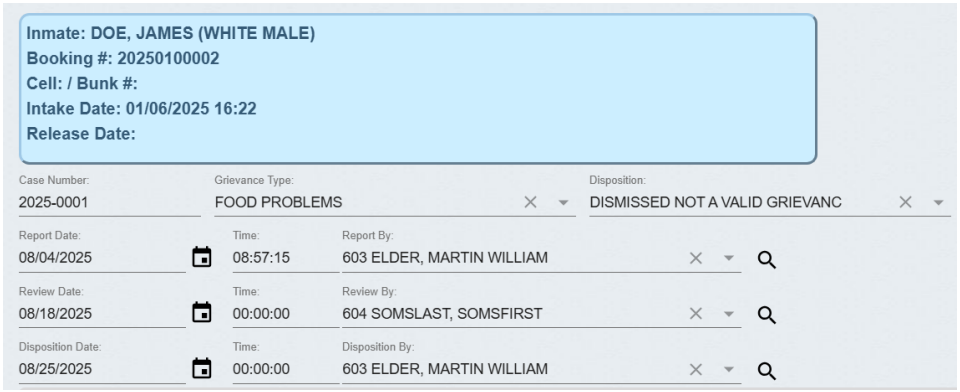


Last Name	First	Middle	Post	Age	Booking #	Cell	Bunk #	Intake Date	Release Date	Race	Sex	Weekender	
DOE	JAMES			0	20241200001			12/27/2024 10:15					✓
DOE	JAMES	RANDAL		60	20250100002			01/06/2025 16:22		W	M		✓
DOE	JAMES	RANDAL		60	20250200002			02/20/2025 15:33		W	M		✓

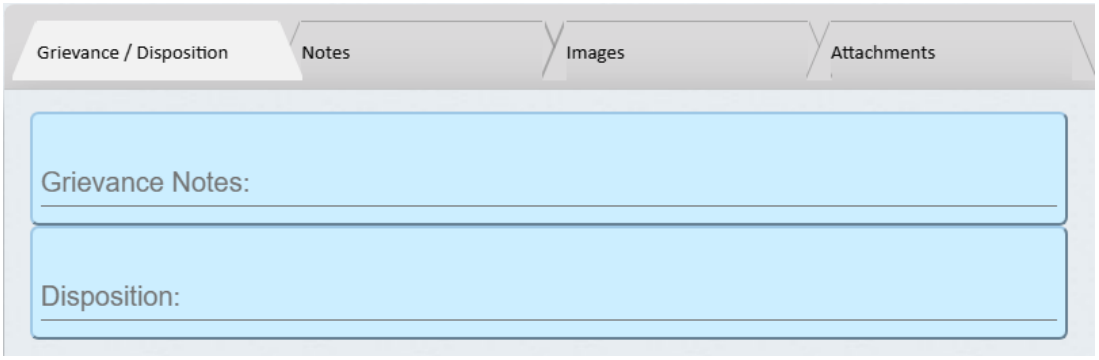


There are two primary sections of the report:

1. The *fields* in the upper part of the screen. These record details about the inmate, dates for report/review/disposition, and categorization dropdowns.



2. The *tabs* record notes on the grievance, and any extra notes, images, or attachments for this record.



Fill out the **Grievance / Disposition** tab to describe the matter. If extra **Notes**, **Images**, and/or **Attachments** are needed, you can add them in the respective tab. This process is covered in detail in the next section, *Filling Out a Grievance Record.*

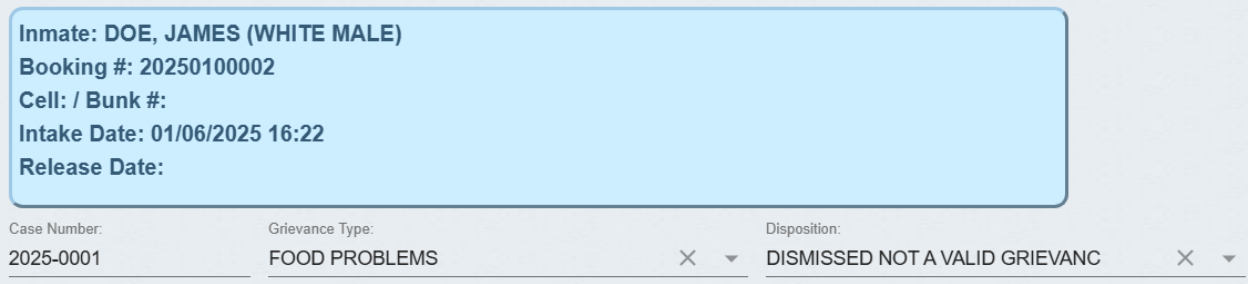
After you enter new details, make sure to click **Save** at the top of the screen.



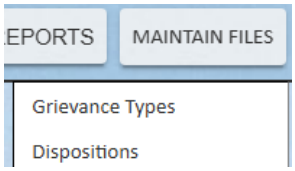
Filling Out an Grievance Record – Fields

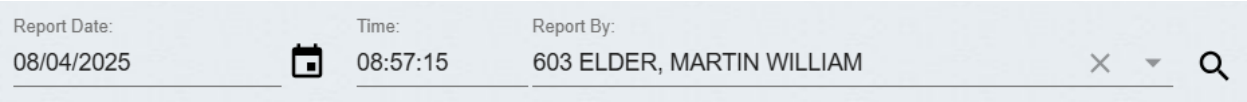
This section explains in detail the different fields and tabs for a Grievance Report. The top section of the report with fields should always be filled out when relevant information is available, and the tabs should be filled out as needed. Grievance Reports are brief to fill in (other than perhaps notes/narrative), so this is not a difficult or involved process.

Fields

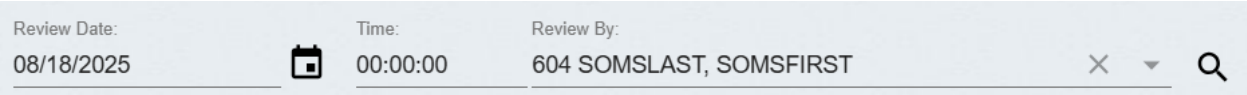


The **Case Number** will automatically be set, but you can change it if you'd like. Then add the **Grievance Type,** such as *Food Problems, Inmate Complaint, Medical Issue,* etc. Once the grievance has been settled, add **Disposition**, such as *Dismissed Not a Valid Grievance, In Favor of Inmate,* or *Not in Inmate's Favor***.** There are various options, but if you need to add more, have a Super User add them in Maintain Files.





Report Date and **Time** should be added automatically. Add who wrote the report in **Report By.**



When the report has been reviewed, add the **Review Date, Review Time,** and **Review By.**



When the report has been disposed, after adding **Disposition** (see above), add the **Disposition Date, Disposition Time,** and **Disposition By.** You probably want to add notes on the disposition details, which would be under the **Grievance / Disposition** tab.

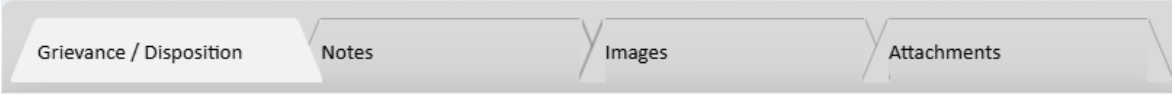
Filling Out an Grievance Record – Tabs

Summary

Usually, you will only have to fill out the first tab (**Grievance / Disposition**) and then add things to the other tabs as needed.

The **Grievance / Disposition** tab lets you put notes on the grievance and what happened with the disposition.

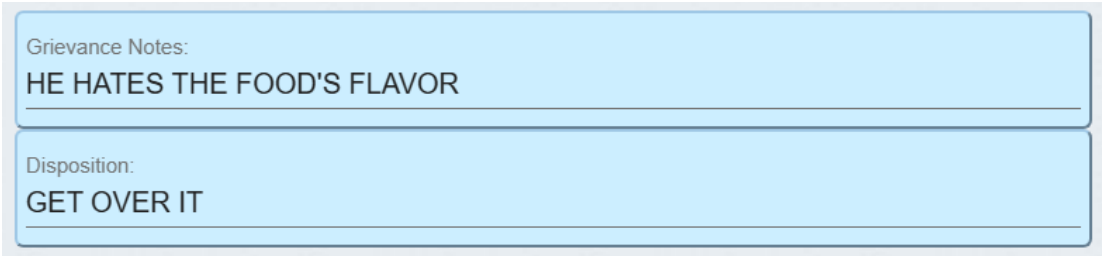
Notes, **Images**, and **Attachments** tabs are available if you need to take additional notes or upload images and documents.



Grievance / Disposition Tab



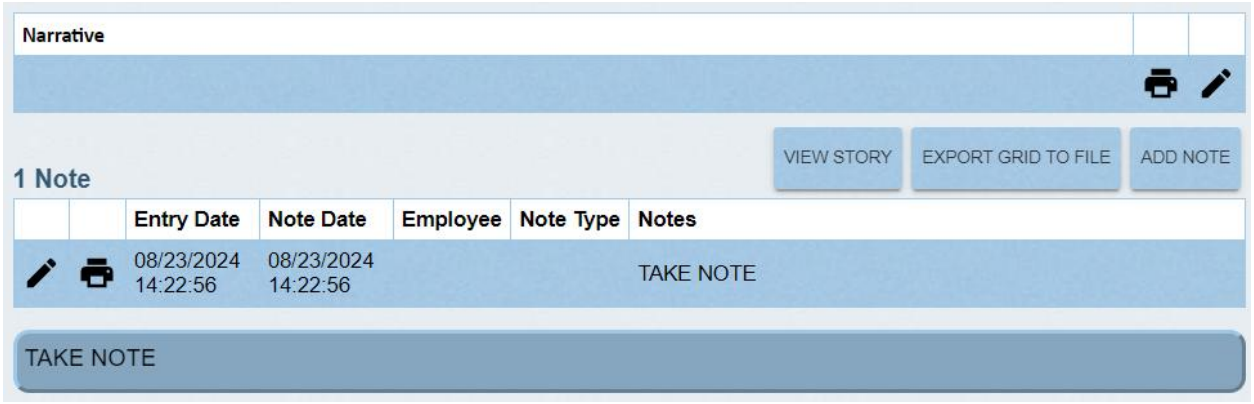
The **Grievance / Disposition** tab lets you record specific notes on the grievance itself and the results of the disposition.



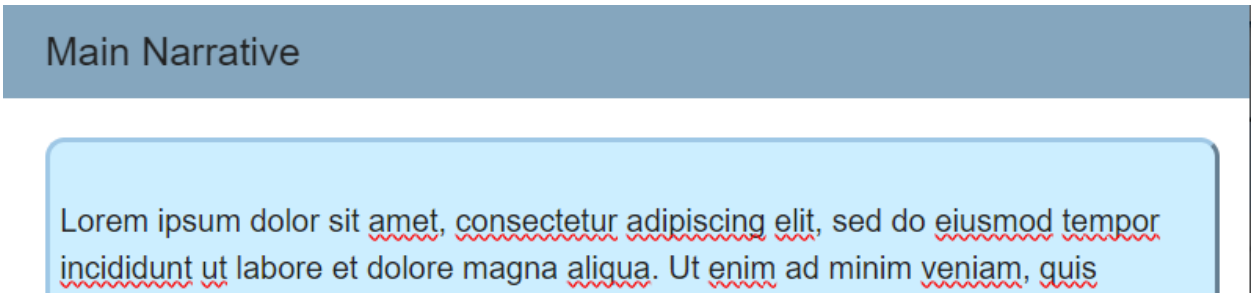
Notes Tab



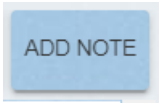
The **Notes** tab is used to view or add notes pertinent to the record. Double-click on any entry in the table to edit or view it.

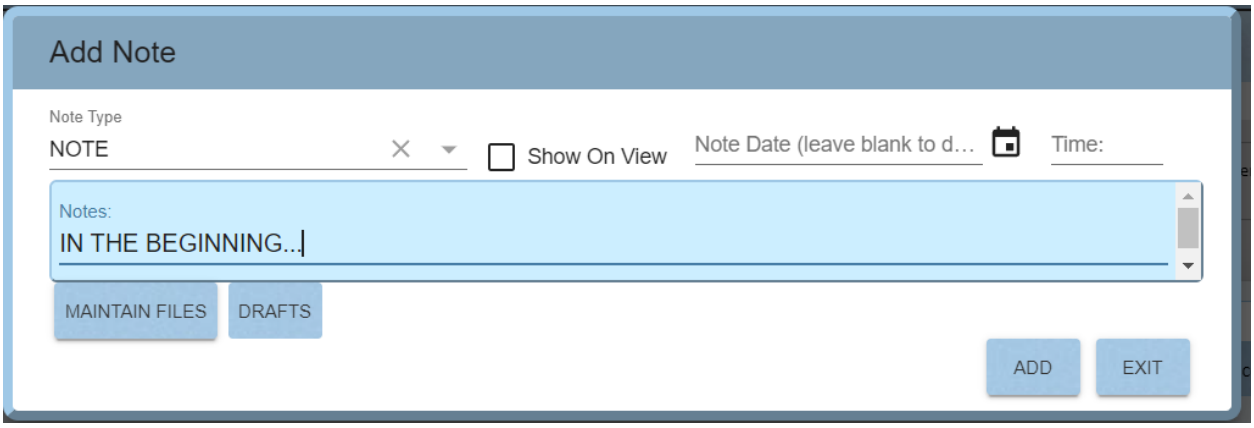


Narrative acts as an area where you can add a long note. This is useful when you want to add important or long form notes that won't be mixed in with the rest of the short notes.



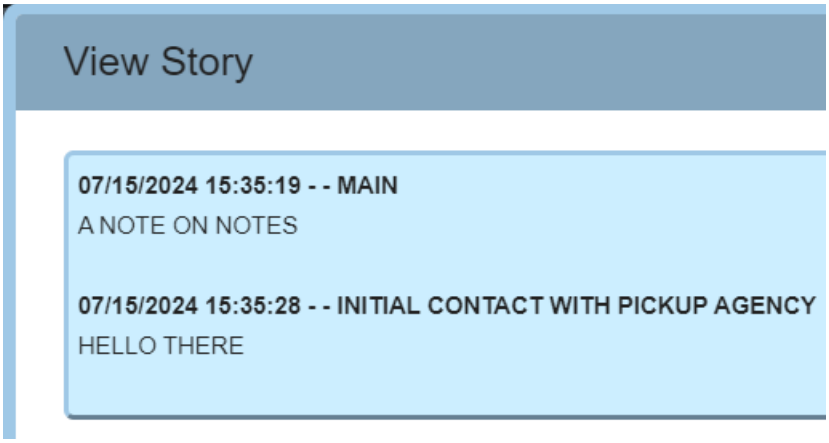
Use **Add Note** to add a new note.





The **View Story** button will show all notes (except Narrative) that have been added on one page.





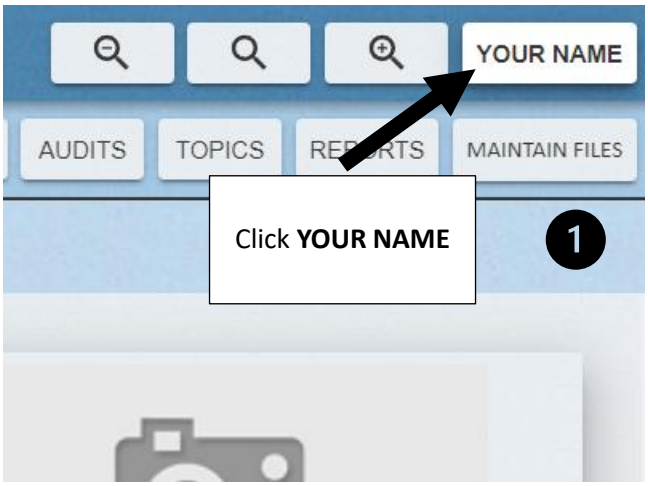
Images Tab

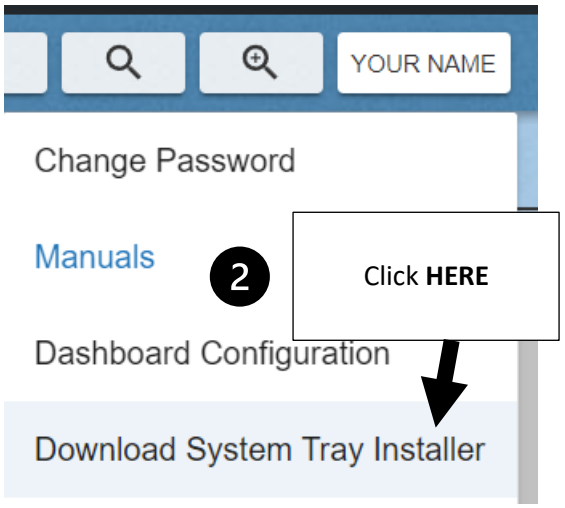


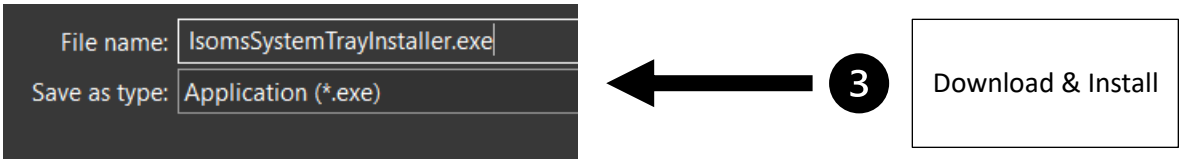
The **Images** tab is used to view, download, or add images. You can add a single image at a time or multiple images at a time. Click **Add Image** to add a single image.



To add multiple images at a time, you will need the System Tray Installer downloaded to the computer you are using. The System Tray Installer can be found on the iSOMS home page by clicking on the button in the upper right with your username. Once you click on that, you will get a drop-down list, and **Download System Tray Installer** is one of the options. Download and install it on this computer.

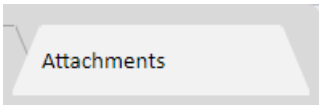




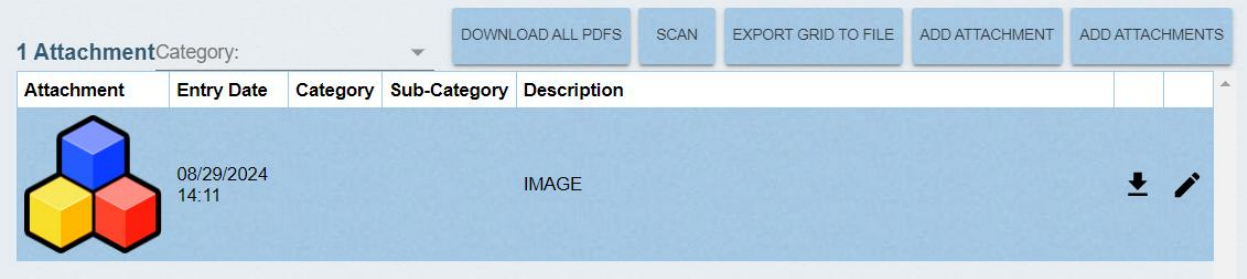


After you have the System Tray Installer on the computer, you can now use the **Add Images** button to upload multiple images at once if necessary.

Attachments Tab



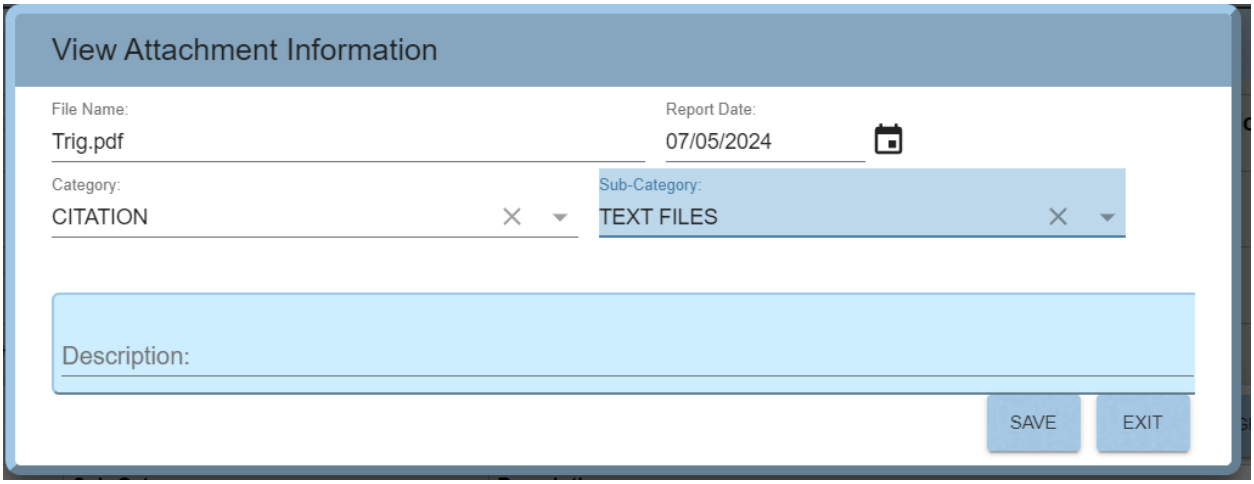
The **Attachments** tab is used to view, download, or add attachments. Double-click a file entry to view the record for the attachment or click on the icon to download the attachment to the computer.



You can add a single attachment at a time or multiple attachments at a time. Just like above with images, you will need the System Tray Installer downloaded to the computer you are using to add multiple attachments at once. See the *Image* tab instructions on the previous few pages for instructions on installing the System Tray Installer.

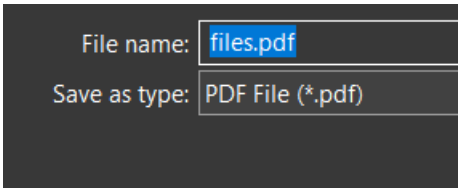
Click **Add Attachment** to add a single attachment or click **Add Attachments** to add multiple attachments at the same time. Choose the attachments from the computer, then add the appropriate category and sub-category for the file.



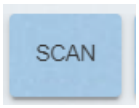


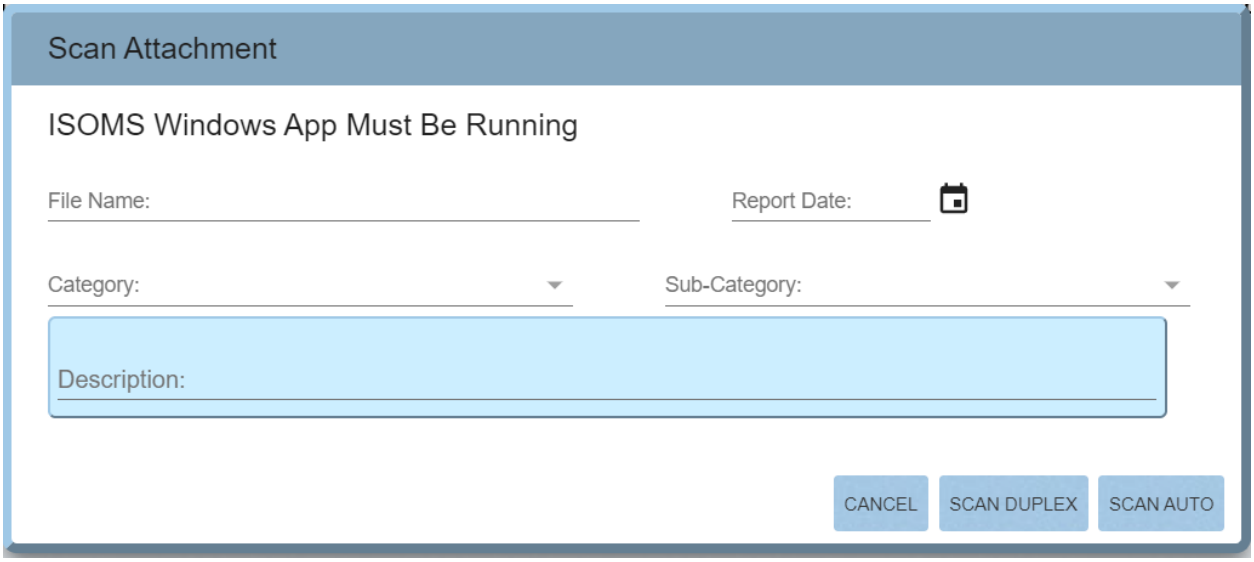
You can also **Download All PDFs** at once by clicking the appropriate button.





If you have the iSOMS Windows App, you can use **Scan** to scan files into the attachments.





Grievance Record Topics

The **Topics** button lets you do special actions in different modules. In **Grievance Records**, if you use the **Topics** button, you will be able to quickly open the **Shift Notes** module right from here.

Once you have opened the **Grievance Records** module, you can click **TOPICS → SHIFT NOTES** in the upper right.



This will open the **Shift Notes** module. If you want more information on the **Shift Notes** module, please see *Shift Notes* on page 275.

Grievance Record Reports

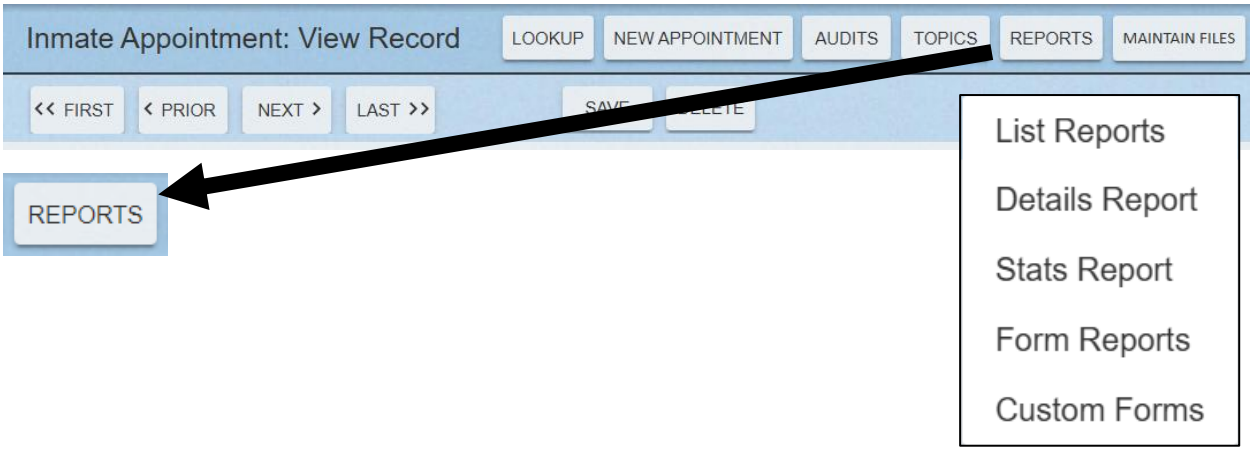
iSOMS has the capability to allow you to print different types of reports for Grievance Records.

To access the reports, begin on the iSOMS home screen. Navigate to:

Corrections → Inmate Tracking → Grievance Reports

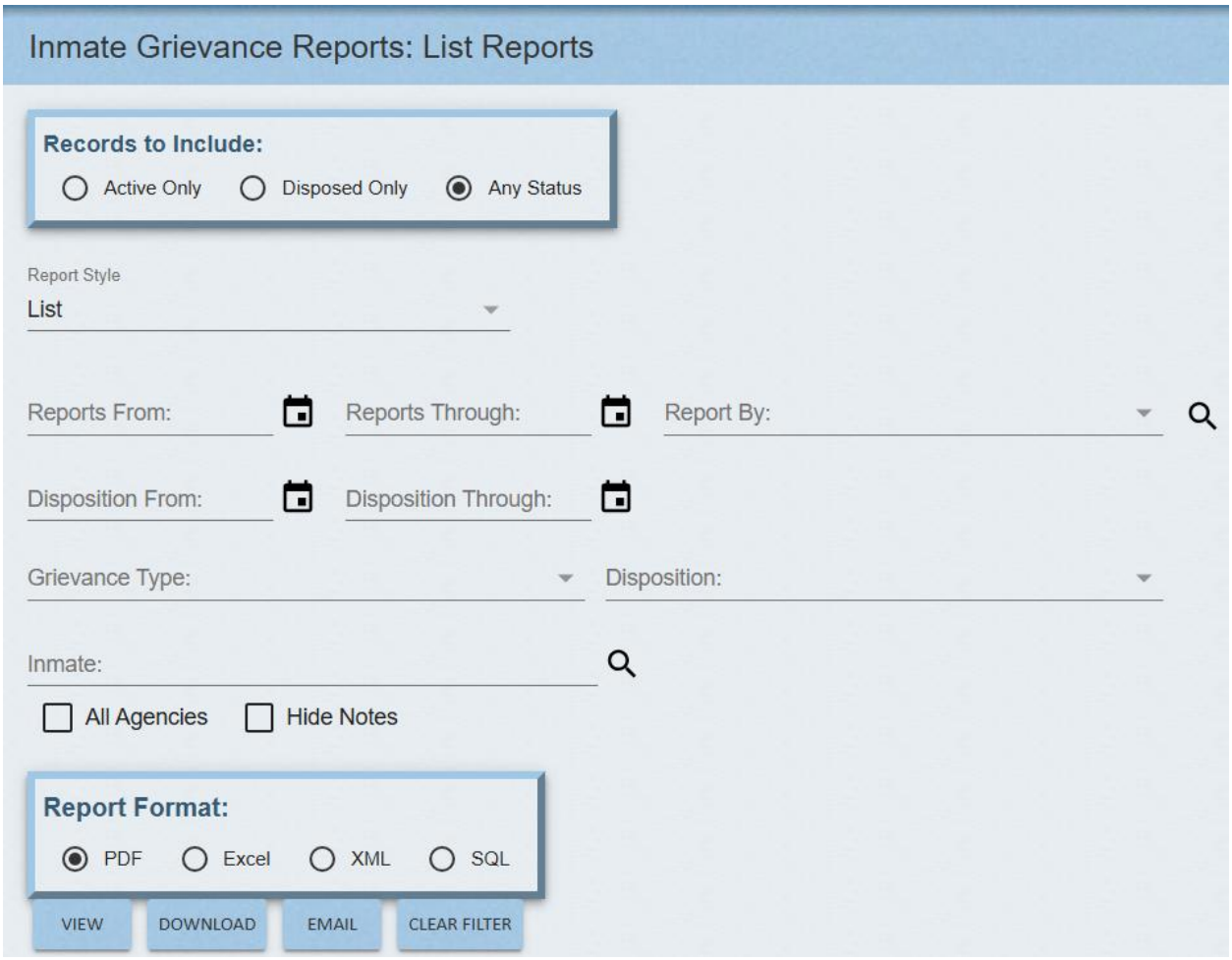


Now click on the **Reports** button in the upper right corner and select the report you wish to run. Different reports are explained over the next set of pages.



List Reports

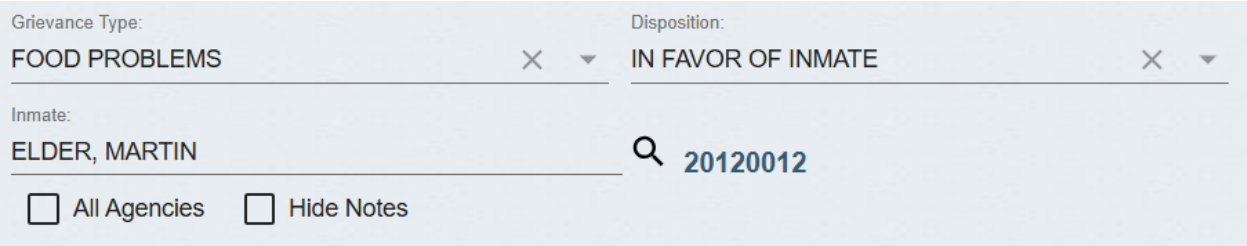
The **List Report** displays grievance records in iSOMS over a certain date range. In this way you can see a list of records over your chosen time period. Add the start and end date in **Reports From** and **Reports Through.**



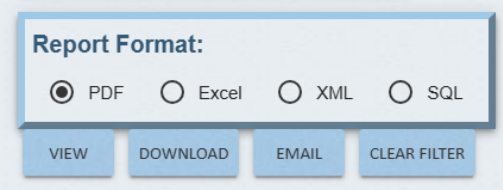
Report Style has some different layout and sorting options, such as *List, Group by Grievance Type, Group by Disposition*. Pick the one most relevant to your desired result.



You can filter to one grievance type, disposition, or inmate, as well as hide notes on the records if necessary.



Now, with your chosen parameters, click **View** or **Download** to view the report.



List Report

YOUR AGENCY

Inmate Grievance List

Report Dates From 02/01/2021 Through 08/04/2025

Page 1 of 1

Inmate Name	Booking #	Grievance	Report Date/Time	Disposition Date	Disposition
		Not Specified	04/01/2023 11:37		Not Disposed
		Not Specified	08/07/2023 11:25		Not Disposed
		IMPROPER USE OF FORCE	12/12/2023 10:30		DISMISSED NOT A VALID GRIEVANC
Grievance Notes:	***gravy too thin***				
		Not Specified	05/23/2024 11:51		Not Disposed
0'SHELL, SHANNON KIMBERLY	20240500009	Not Specified	07/04/2024 15:38		Not Disposed
		Not Specified	07/16/2024 13:06		Not Disposed
DOE, JAMES RANDAL	20250100002	FOOD PROBLEMS	08/04/2025 08:57	08/25/2025	DISMISSED NOT A VALID GRIEVANC
Grievance Notes:	***HE HATES THE FOOD'S FLAVOR***				
Disposition Notes:	***GET OVER IT***				

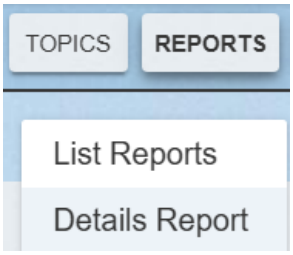
Details Report

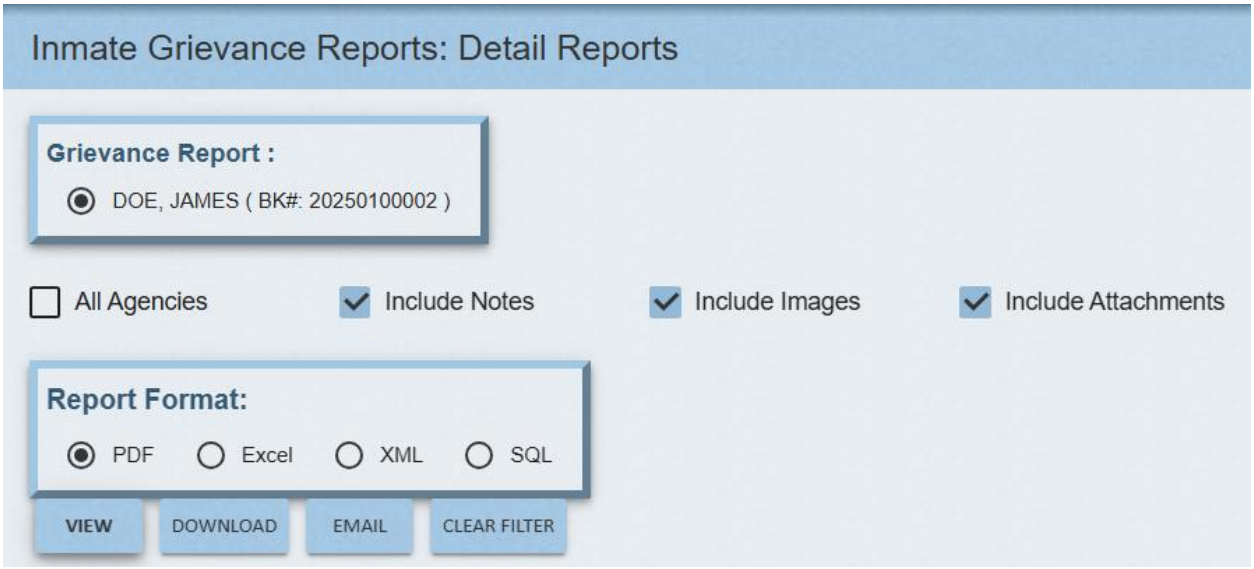
This report displays many details for individual grievance reports in your iSOMS records.

First, go to the record you want to make a detail report for and open its record in iSOMS.



Then click **REPORTS → DETAILS REPORT** to open the Detail Report screen.





Choose what you would like included on the report, such as images, attachments, or notes. And with your chosen parameters, click **View** or **Download** to view the report.



YOUR AGENCY
Grievance Report

Grievance Report

Full Name	Intake Date	Release Date	Booking #
DOE, JAMES RANDAL	01/06/2025 16:22		20250100002

Race: **WHITE** Sex: **MALE** DOB: **01/01/1965**
Cell: **--** Jacket#: **82614**

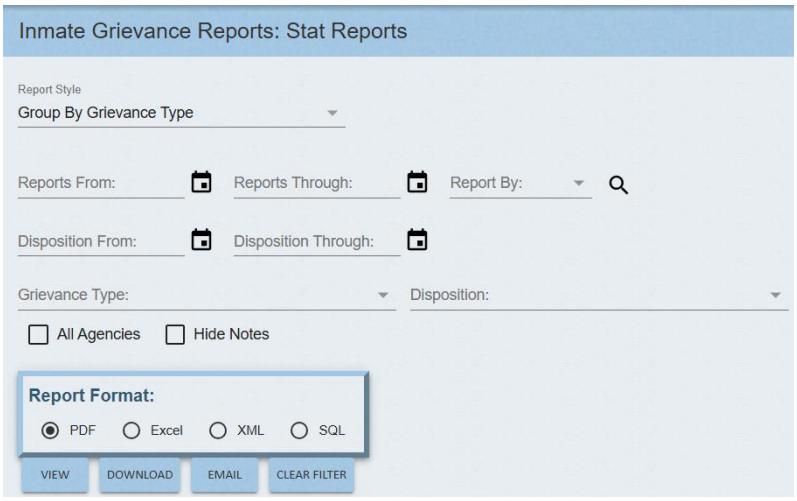
Report Date: **08/04/2025 08:57** Report By: **SSOMSLAST**
Grievance Type: **FOOD PROBLEMS**
Review Date: **08/18/2025 00:00** Review By: **SOMSLAST, SOMSFIRST**
Disposition Date: **08/25/2025** Disposition By: **MWELDER**
Disposition: **DISMISSED NOT A VALID GRIEVANC**

Grievance: ***HE HATES THE FOOD'S FLAVOR***

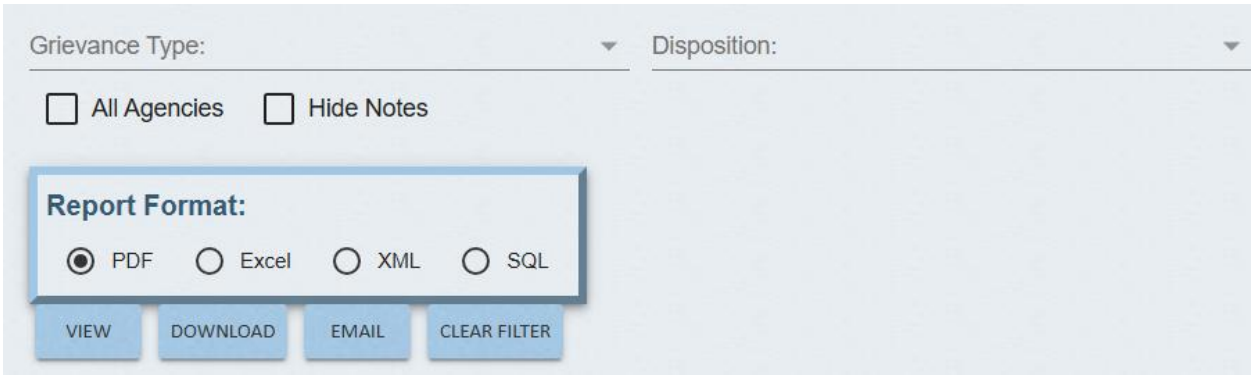
Disposition: ***GET OVER IT***

Stat Reports

This report displays Grievance Record stats in iSOMS over a certain date range. In this way you can see statistics for your records over a certain period. Add the start and end date in **Reports From** and **Reports Through** or **Disposition From** or **Disposition Through.** This report has two *Report Styles*: you can get stats based on the grievance type or disposition.



You can add filters for **Grievance Type** or **Disposition**. Now, with your chosen parameters, click **View** or **Download** to view the report.



YOUR AGENCY

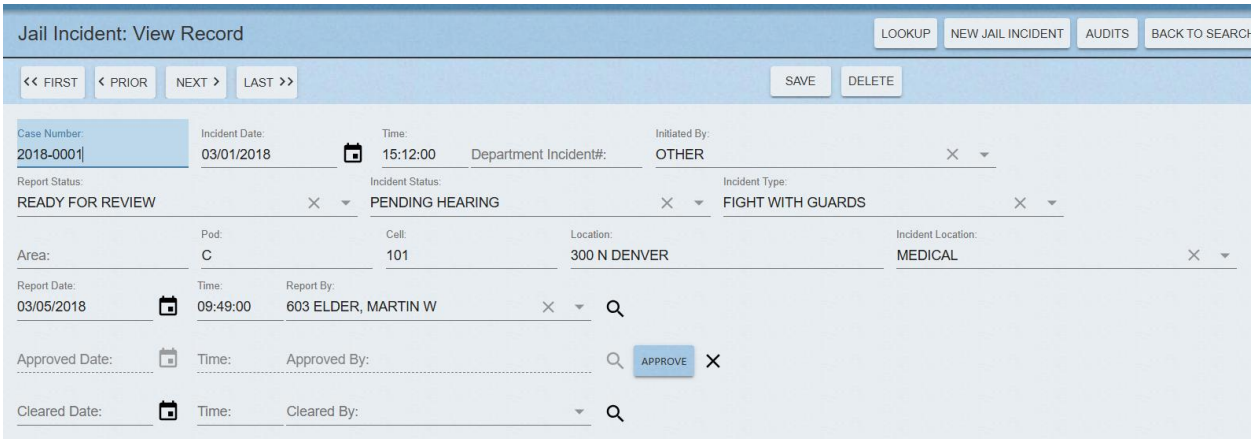
Inmate Grievance- Stats By Grievance Type

Description	Count	% To Total
FOOD PROBLEMS	10	17.54
IMPROPER USE OF FORCE	2	3.51
INMATE COMPLAINT	23	40.35
LIVING CONDITIONS	3	5.26
MEDICAL ISSUE	2	3.51
SAFETY CONDITION	1	1.75
SANITATION CONDITION	5	8.77
VIOLATION OF INMATES RIGHTS	5	8.77
WISCONSIN	1	1.75
Not Classified	5	8.77

Report Count: **57**

Jail Incident Reports

Jail Incident Reports allow you and your agency to track any incidents that may occur. iSOMS allows you to write up a jail incident report so that it can be reviewed, approved, and referred to later. You can quickly reference any inmates and employees and track any issues that would need to be recorded for filling out P.R.E.A. reports. This section will explain searching existing jail incident reports, creating a new jail incident report, and filling out a jail incident report.



The first part of this section explains searches. If you need explanations on an already existing report, see the *Filling Out a Jail Incident Report* to get more information on the different fields and tabs available.

Searching for Existing Incident Records

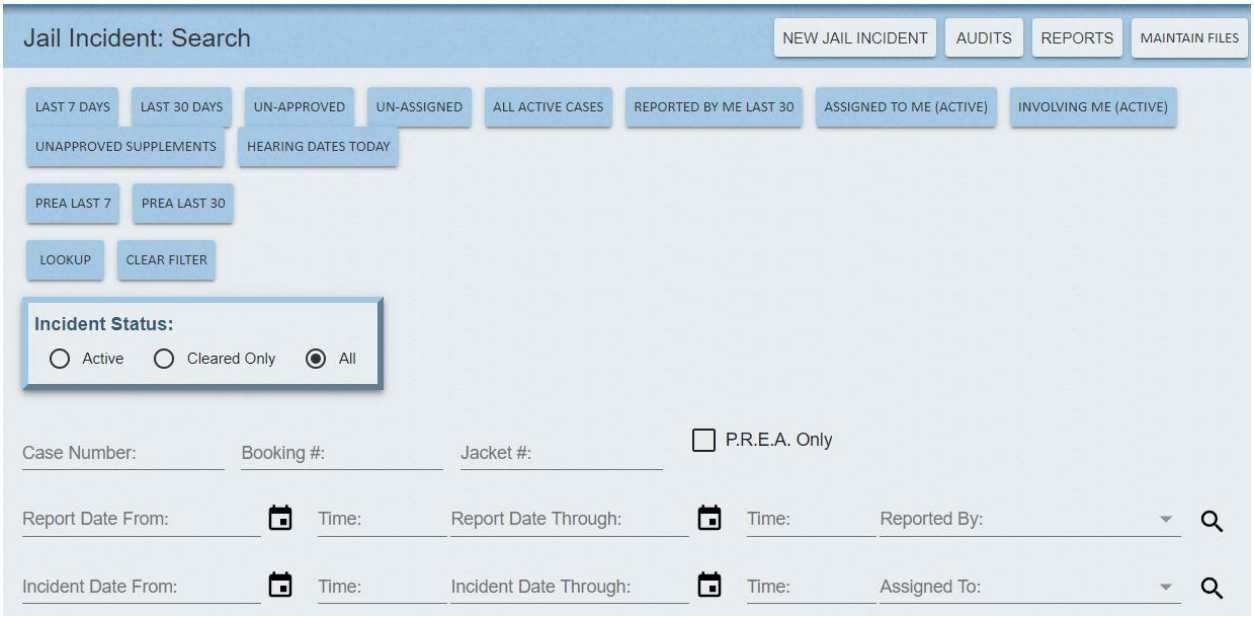
To search existing records, begin on the iSOMS home screen.

Navigate to:

Corrections → Inmate Tracking → Jail Incident Reports

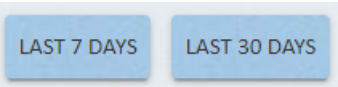


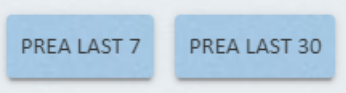
This will open the **Jail Incident Search** screen. Here you can search and filter for different incident reports. You can either use the blue buttons to do *quick searches* or enter information in the fields to do *standard searches.*



Quick Searches

Several different quick searches are available by using the blue buttons.

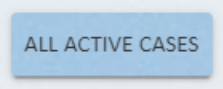




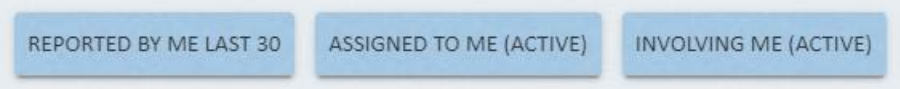
Last 7 Days and **Last 30 Days** will show you all the reports in the specified recent time periods. **PREA Last 7** and **PREA Last 30** show cases with PREA incidents for the last 7 and 30 days respectively.



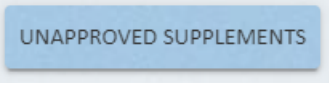
Unapproved lets you quickly find reports that have been written but haven't been approved by a supervisor. **Unassigned** lets you see reports that do not have an investigator or supervisor who is assigned to looking into the incident. This can be very useful for supervisors trying to ensure all reports have been approved or assigned in a timely manner.



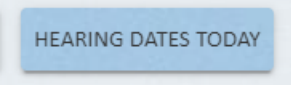
All Active Cases simply returns all case reports that are active (i.e. have not yet been closed.) This *does* include unapproved and unassigned cases.



These buttons let you find cases relevant to yourself. **Reported by Me Last 30** will show all reports you've entered in the last 30 days. **Assigned to Me (Active)** displays all *active* cases that you have been assigned to investigate underneath the *Investigations* tab. **Involving Me (Active)** lists any *active* case where you have been added as involved under *Officers Involved* or *Others Involved.*



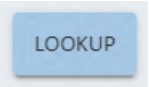
The **Unapproved Supplements** search allows you to view cases where supplements (notes or observations added later) have not yet been approved. This can be useful for supervisors to find cases where they need to approve supplements added to a report.



Hearing Dates Today only shows cases with today's date for the hearing.

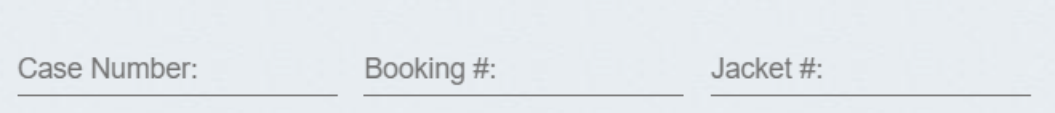
Standard Searches

Various fields are available if you need to do a search that the quick searches won't work for. Fill in the fields to narrow the search and click **Lookup** at the top or bottom of the page to perform the search. If you need to start over, simply click **Clear Filter** to remove all search field entries.





Field Explanations

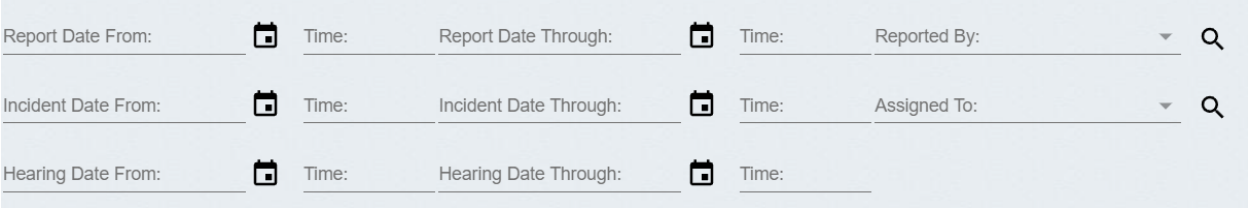


These fields let you search for specific cases and reports involving specific people. **Case Number** is to search for a specific case if you know the case number for the report.

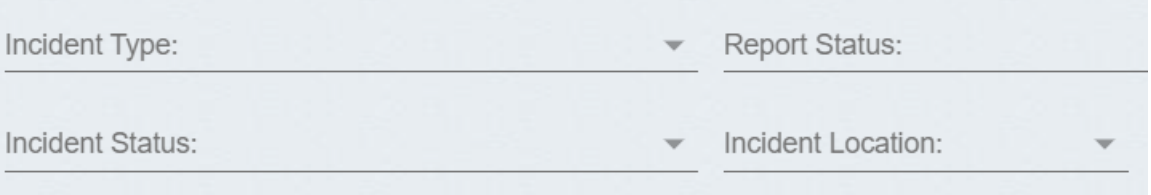
Booking # and Jacket # let you search for cases that have people with a certain booking # and jacket #. This can be useful to look up past incidents by person or booking report.



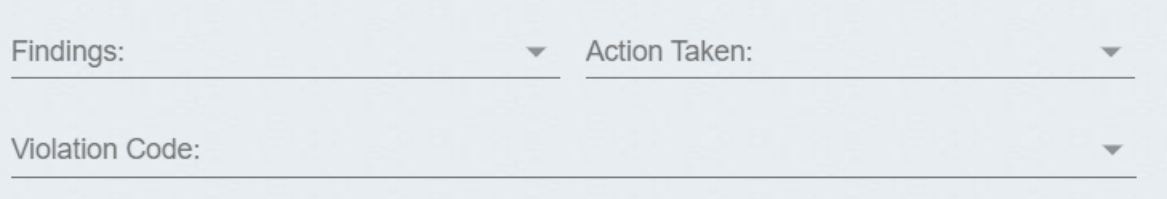
The **PREA Only** checkbox is used to find cases where an incident is marked as P.R.E.A.



These fields let you find cases that happened, were reported, or have a hearing during a specified time period. You can also search for who wrote the report or who is assigned to the case.

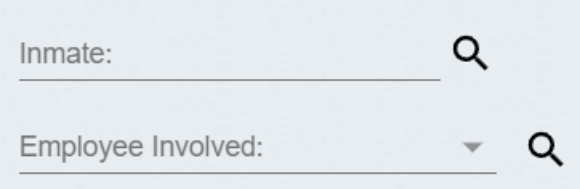


Incident Type searches for certain incident types, such as a fight, PREA, use of force, etc.
Incident Status relates to whether the case is active, inactive, closed, or pending a hearing.
Report Status lists the state of report, whether it is under review, assigned, is pending, etc.
Incident Location is simply for the location of the incident as listed in the report.



Findings searches for the result of the investigation. **Action Taken** finds reports where a selected action was taken based on the findings of the investigation. This would include, for example, termination or write ups for employees.

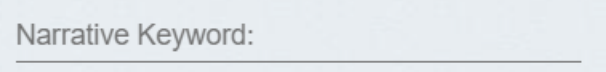
Violation Code searches reports where specified violations have taken place and been noted in the report.



These fields let you search for reports involving a specific inmate or employee. Use the magnifying glass to search for specific people in your system.

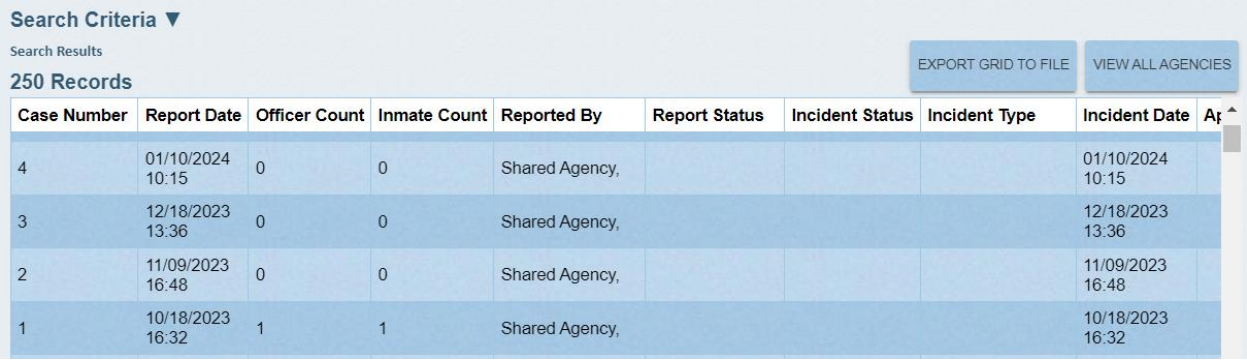


The **PREA Incident Type** and **Status** fields let you search for reports containing PREA incidents.



The **Narrative Keyword** field lets you search for words in the narrative of reports.

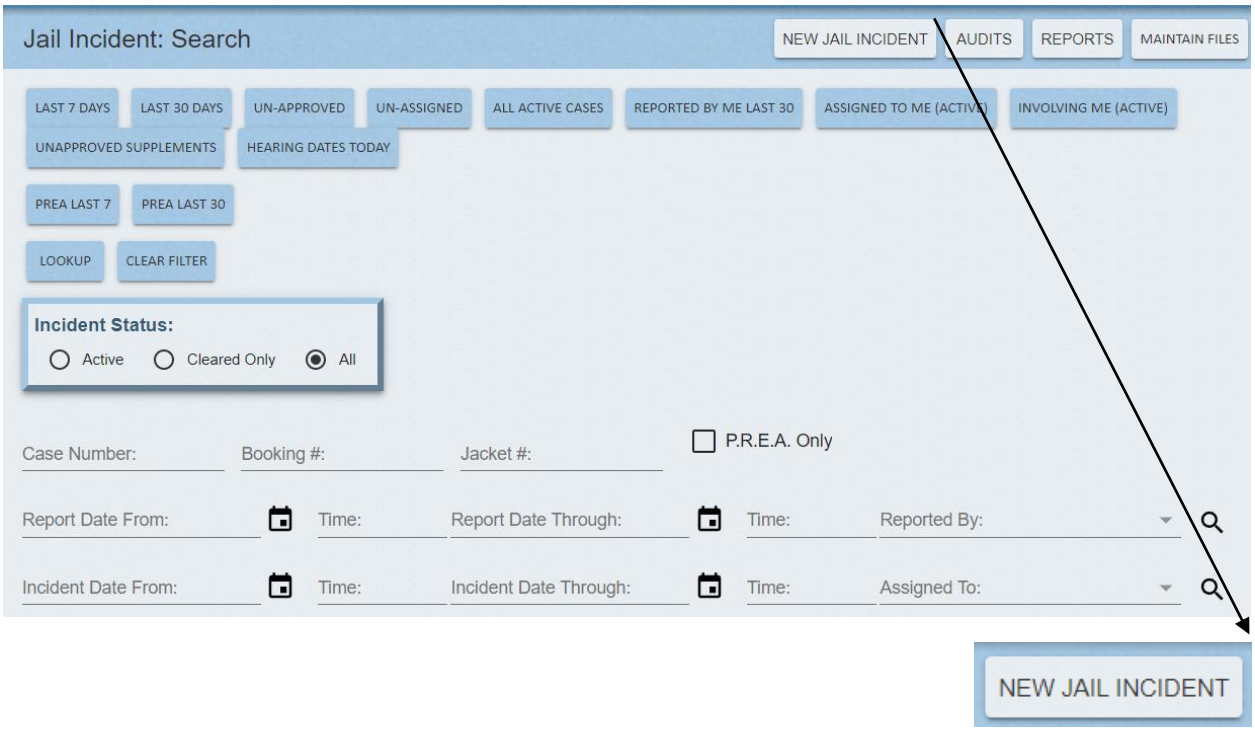
As mentioned above, when you have finished with your search parameters, click **Lookup** to perform your search. Double click on the desired entry to view, edit, or approve the report.



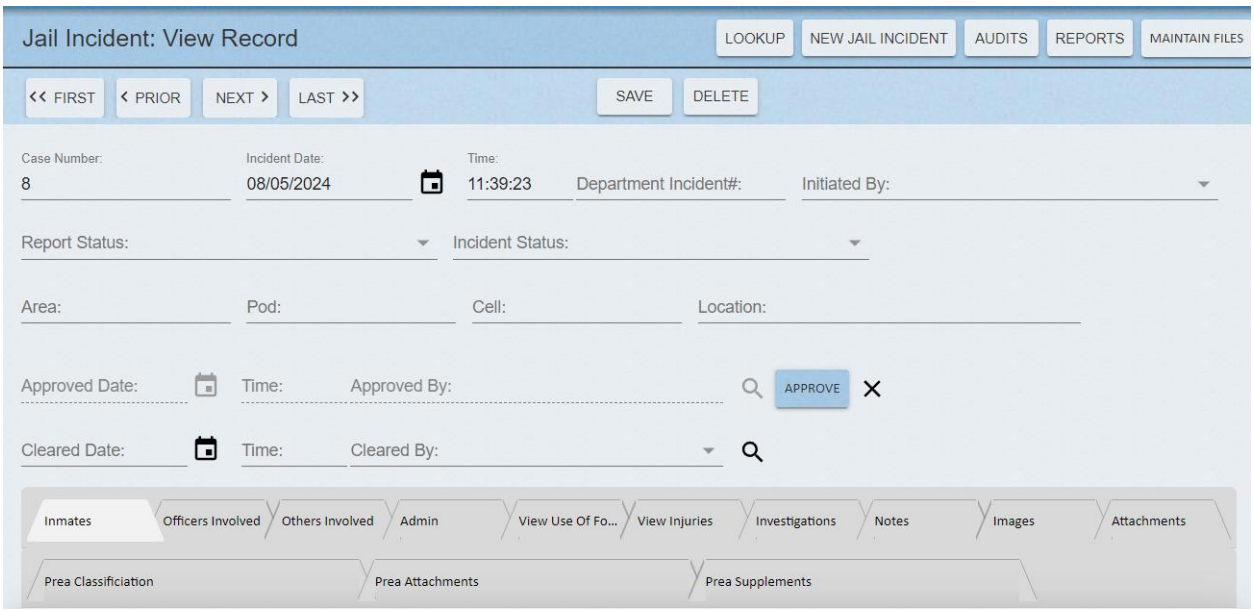
Case Number	Report Date	Officer Count	Inmate Count	Reported By	Report Status	Incident Status	Incident Type	Incident Date	Ap
4	01/10/2024 10:15	0	0	Shared Agency,				01/10/2024 10:15	
3	12/18/2023 13:36	0	0	Shared Agency,				12/18/2023 13:36	
2	11/09/2023 16:48	0	0	Shared Agency,				11/09/2023 16:48	
1	10/18/2023 16:32	1	1	Shared Agency,				10/18/2023 16:32	

Creating a New Jail Incident Report

To create a new jail incident report, click **New Jail Incident** in the upper right corner of the Jail Incident search screen:

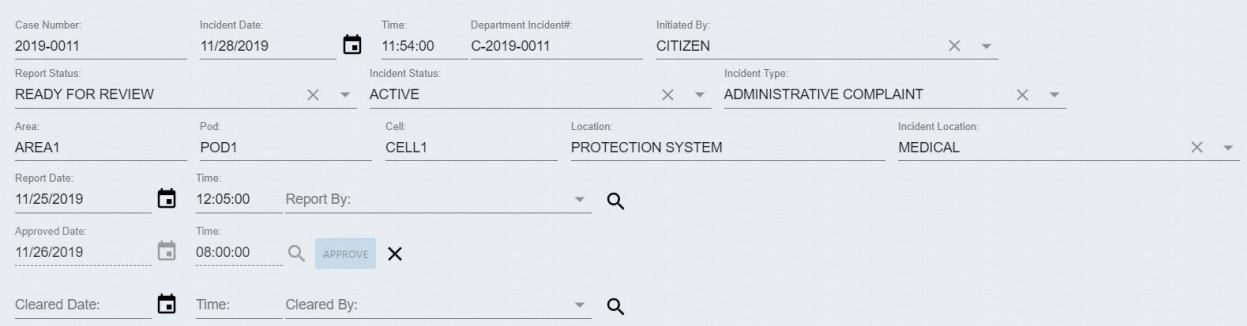


You will be asked to confirm creating a new incident report. Click **Yes** and you will see a new Jail Incident report screen.

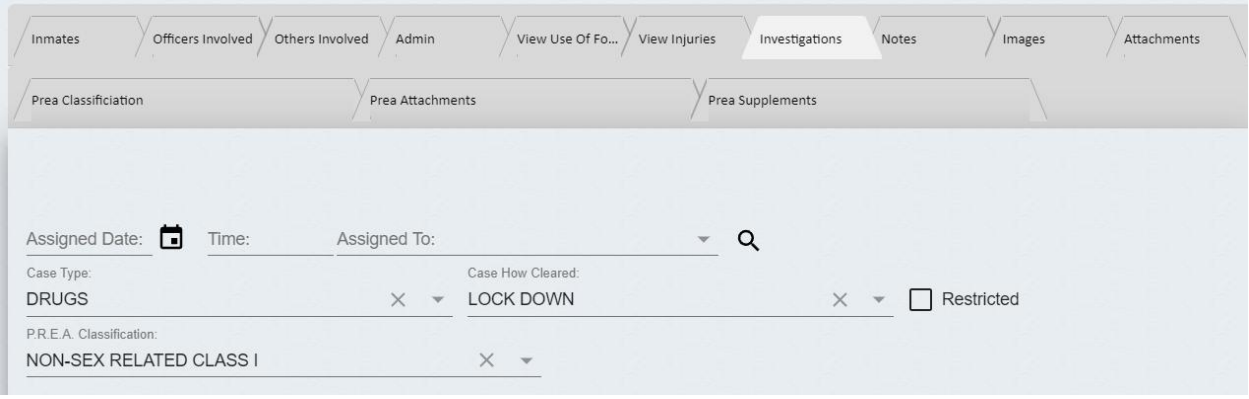


There are two primary sections of the report:

1. The *fields* in the upper part of the screen. These record details about when the report was filed, what type of incident occurred, and the current status of the incident and report.



2. The *tabs* record information about inmates or officers involved, the investigation of the incident, notes, images, PREA details, and more.



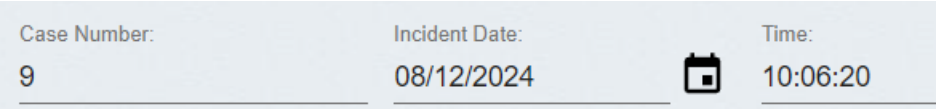
Fill out the fields at the top of the screen and then make sure to fill out the following tabs as appropriate: **Inmates, Officers Involved,** and **Others Involved.** If other details are needed, you can fill out **Investigations, Notes, Images, Attachments,** and the **PREA** tabs as appropriate. This process is covered in detail in the next section, *Filling Out a Jail Incident Report.*

After you enter new details, make sure to click **Save** at the top of the screen.

Filling Out a Jail Incident Report – Fields

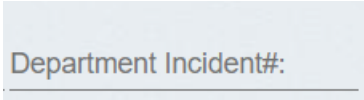
This section explains in detail the different fields and tabs for a Jail Incident report. The top section of the report with fields should always be filled out when relevant information is available, and the tabs should be filled out as needed.

Fields



Case Number will automatically be filled in when you create an incident record, but if you want to use a different numbering system, feel free to change it here.

List the day and time the incident occurred under **Incident Date / Time.** If the incident was a prolonged or reoccurring event, you can add additional details under the *Notes* tab.

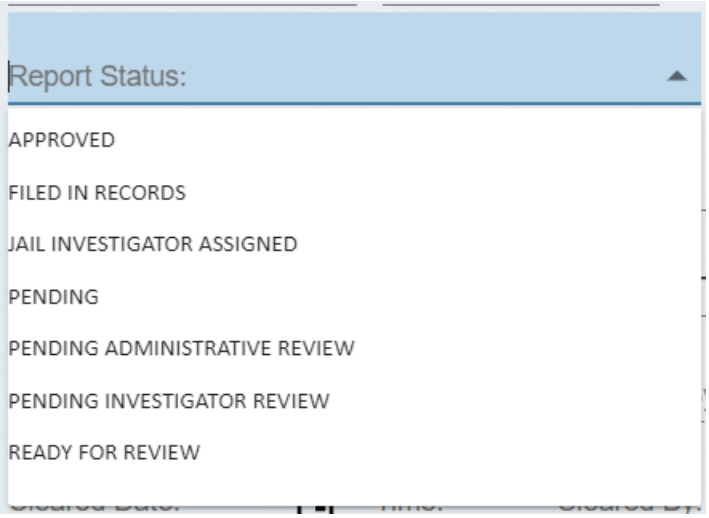


Department Incident # lets you have a separate field from case number in case you want a separate field for your department's numbering system.

Initiated By lets you record who reported this incident first. Typical options include admin, citizen, anonymous (or citizen unknown), inmate, officer, or supervisor. Additional details about who reported this incident can be added to the *Notes* tab.

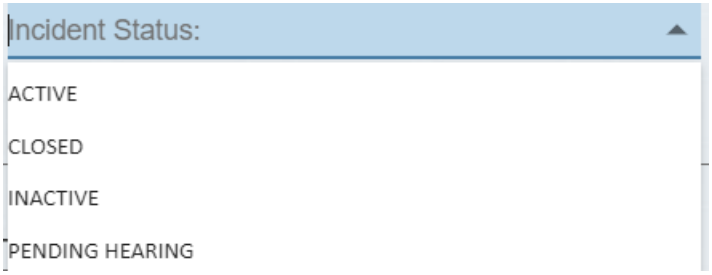


Report Status lets your agency keep track of the current state of the incident investigation. Use it to keep everyone clear on the current status of approval or investigation, and make sure to update it when the report is approved by a supervisor.



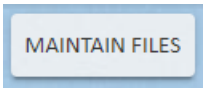
IMPORTANT: A supervisor should approve the report once it is filled out to verify the information is accurate and complete. See *Approval* below for more information.

Incident Status records the results of the investigation and hearing for the incident.

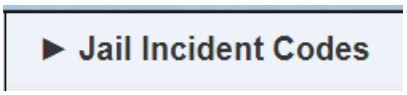


Incident Type lists the type of incident. If you would like to add additional options for this field, a Super User will need to use *Maintain Files.*

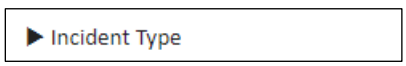
To do this, click *Maintain Files* in the upper right corner.



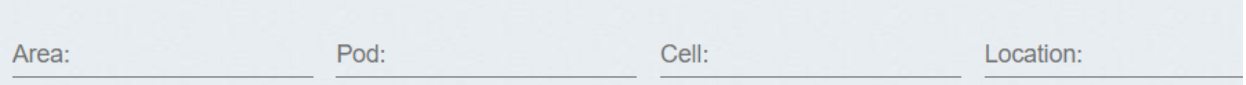
Now click *Jail Incident Codes*.



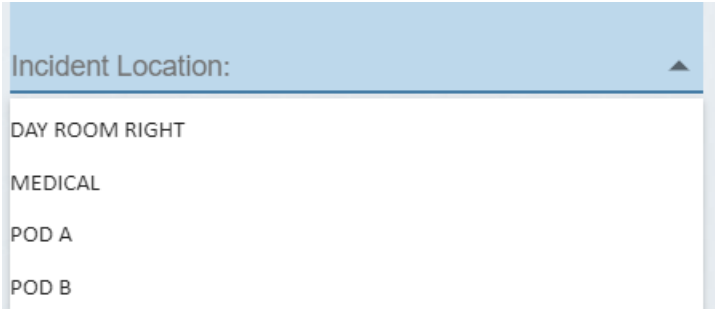
Now click *Incident Type*:







These fields (**Area, Pod, Cell, Location**) are for the location where the incident occurred. You can also use the **Incident Location** drop down field for a quick selection of locations that have been added.



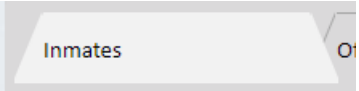
The final section of fields lists the officers or employees involved with the report:



These fields list who has filled out, approved, and cleared the report.

Filling Out a Jail Incident Report – Tabs

Inmate Tab



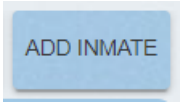
The **Inmates** tab lets you record any inmates that were involved in an incident and details relevant to the incident. To view, edit, or delete a current entry, double-click an entry from the table.

When you add a new entry, you should fill out only the tabs you need to fill out to track information and then save it. Details are provided for each of the sub-tabs below, although each sub-tab is relatively intuitive. Add information as needed.

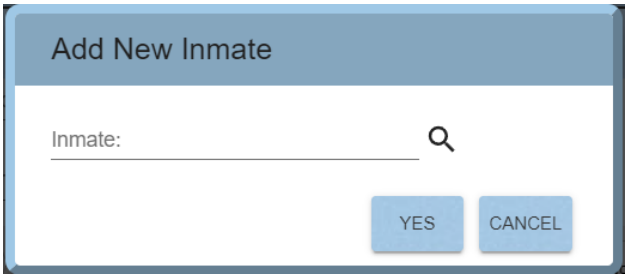


Currently Incarcerated	Inmate	Entry Date	Jacket	SSN	Booking	Race	Sex	Intake Date	Release Date	
Yes	DOE, JOHN H	08/16/2024	428677		20230100001	WHITE	MALE	01/16/2023		
Yes	DOE, JEFF P	08/16/2024	818260		20240200008	BLACK OR AFRICAN AMERICAN	MALE	02/28/2024		
No	DOE, JOE	08/16/2024	0		20240400004	WHITE	MALE	04/11/2024		

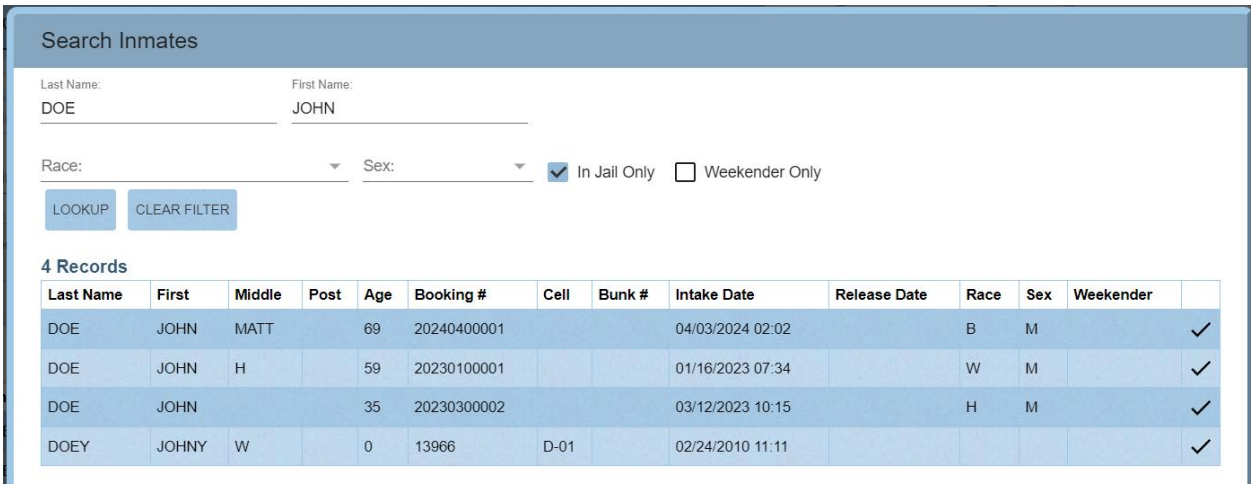
In order to add a new entry, click the **Add Inmate** button.



Click the magnifying glass (🔍) icon to search for an inmate. Enter relevant name or identifying info and then click **Lookup**.



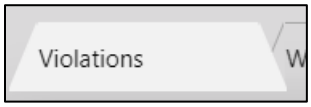
Double-click the inmate you want to add or click the *checkmark* symbol. 



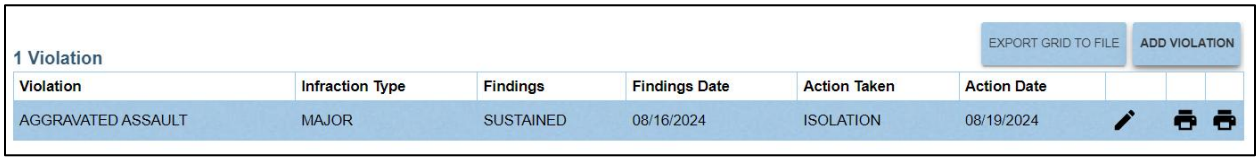
This will open the *View Inmate Involved* screen. Here you can add details about how the inmate was involved in the incident.

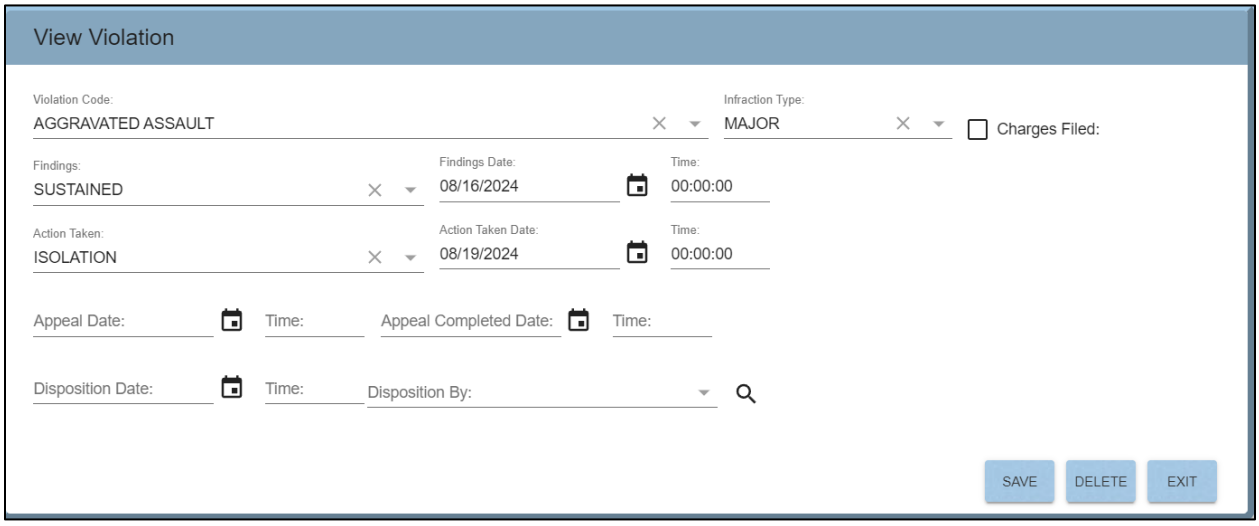


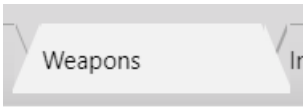
Record **How Involved** in the dropdown menu available, then go through the tabs for the inmate entry.



Begin with the **Violations** tab. Click **Add Violation** to add violation details. Fill in the relevant violation information and click **Save** when finished.



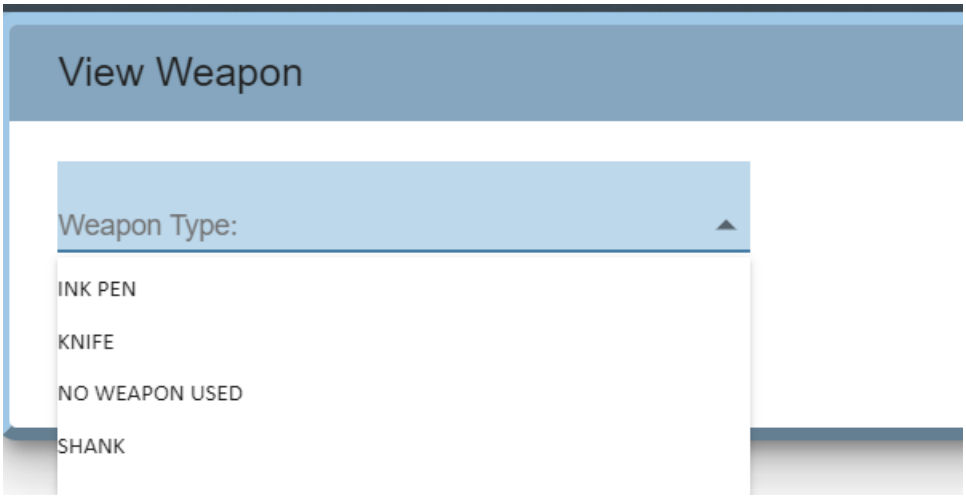




Now add if any **Weapons** were used in the incident. Click **Add Weapon** to add a record.

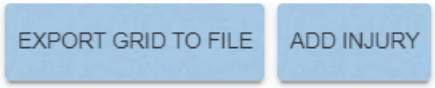


Select the weapon type from the list and click **Save**.





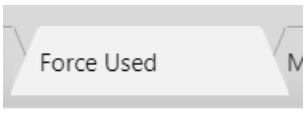
Now add if any **Injuries** occurred to this inmate. Click **Add Injury** to add a new entry.





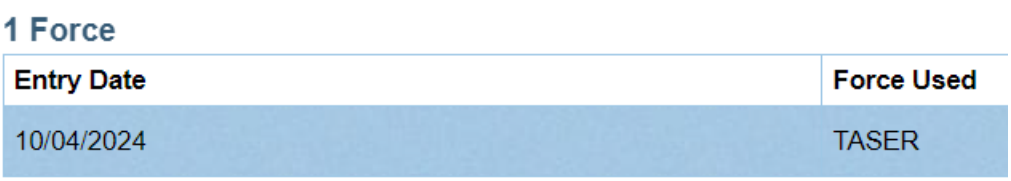
Select the injury type from the list and click **Save**.





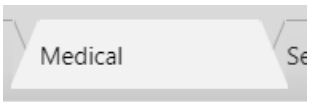
Record if there was any **Force Used** on this inmate under this tab.
Click **Add Force** to add an entry.



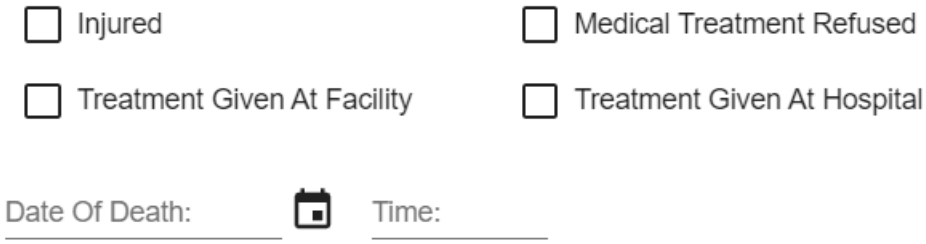


Select the force type from the list and click **Save**.



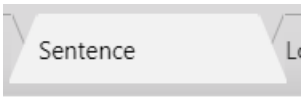


Now you can fill out the **Medical** tab. It lets you track a few details about medical details related to the incident.



Check if the inmate was *Injured* in the incident, if *Treatment Given* at the appropriate locations, or if *Medical Treatment* was *Refused*.

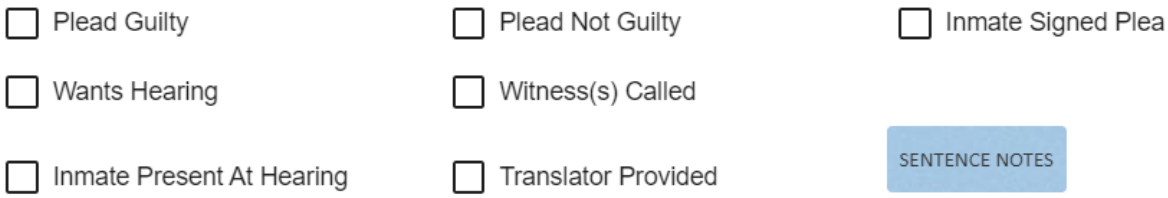
If the inmate died, record it in the **Date and Time of Death** fields.



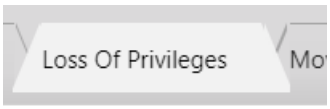
The next tab is the **Sentence Tab**. Here you can add information if the incident lead to the sentencing of the inmate.



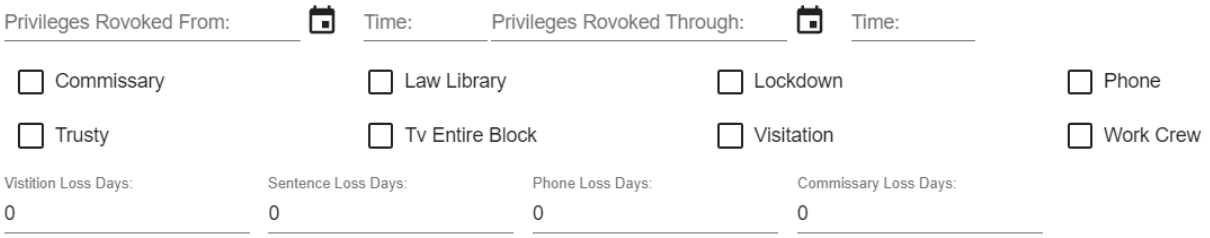
Add the **Notice** date and **Hearing/Waived Hearing** dates as appropriate.



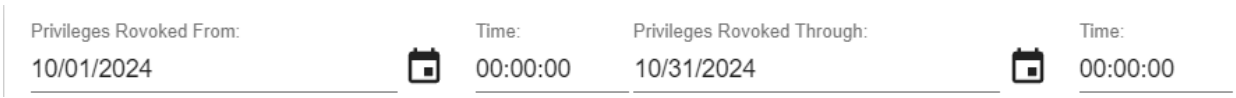
Check appropriate boxes related to the sentencing and add any **Sentence Notes** by using the **Sentence Notes** button.



If the incident led to **Loss of Privileges,** fill out that information in this tab.



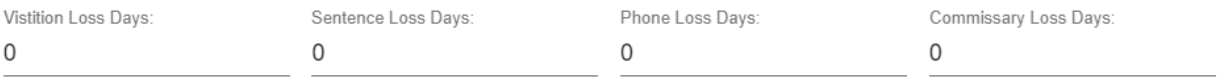
If the inmate's privileges were revoked, add the date and time **From** and **Through**:

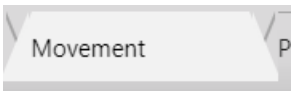


List the **Loss of Privilege Categories** by checking appropriate boxes for restrictions such as visitation, commissary, phone, etc.:

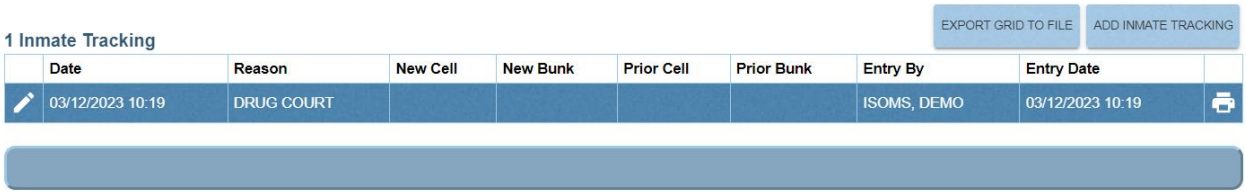


If the restrictions come with loss days, record them in the **Loss Days** fields:





You can use the **Movement** tab to record any movements here. This lists all movements of the inmate, not just related to the incident, but this tab provides a convenient way to record movement info while already in this module.

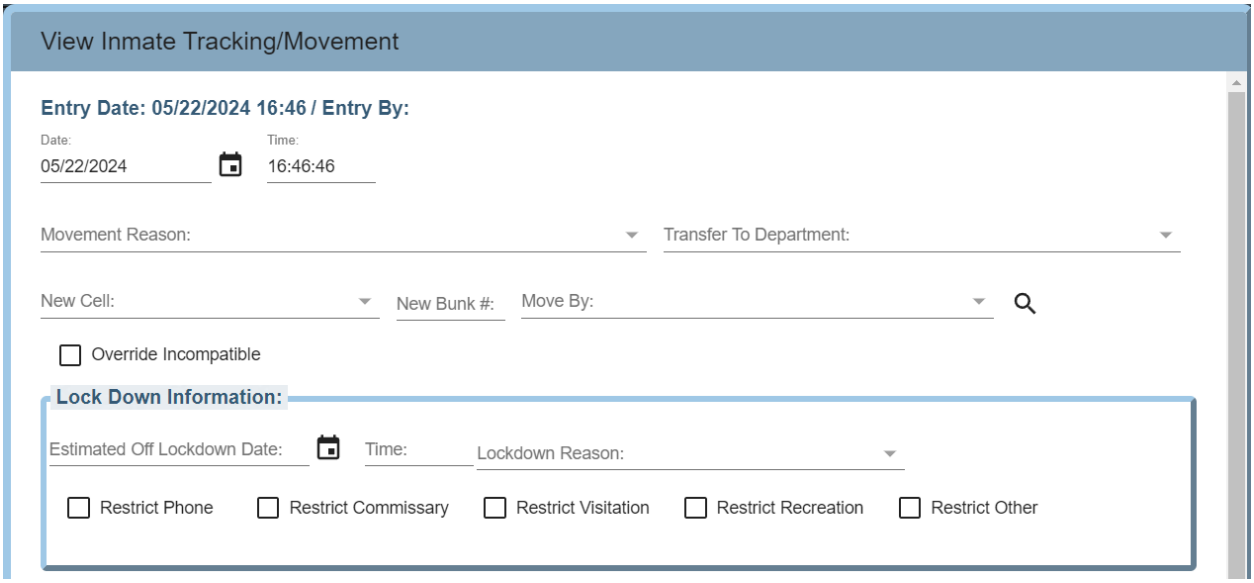


To edit an existing list item, simply double click it to edit it.

Add a New Movement or Tracking



When you click on the **Add Inmate Tracking** button on the upper right corner of the tab, the following screen will pop up where information can be entered. This screen also includes lockdown information.





Movement Reason lists the reason for the movement or status change of the inmate. Note that if the inmate has moved cells, you must also fill out the **New Cell** dropdown box as well. Appendix A (page 725) has a list of Movement Reasons for this box if you would like to see the default options.

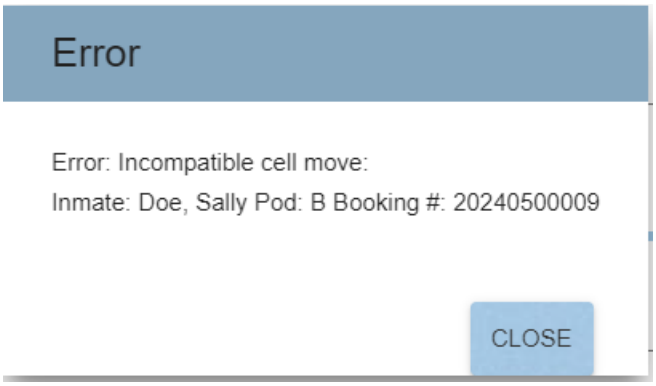


Transfer to Department should be filled in if the inmate is being moved to another department or agency.



New Cell / New Bunk # are the two fields that actually change the location of the inmate. Any changes here will be reflected in the **Housing** tab. If you attempt to move an inmate to a cell where another incompatible inmate is, you will get a warning about moving them into the same cell. You can override this with the **Override Incompatible** checkbox if necessary.

If anyone tries to move two incompatible inmates into the same cell, the following warning will appear:



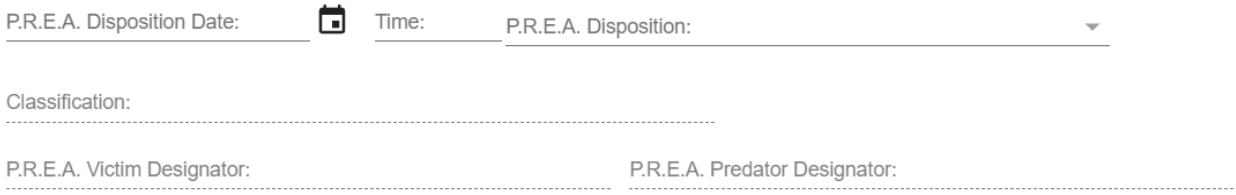
This helps others know not to combine these inmates in the same cell in case they are not familiar with the situation between the inmates. See the *Incompatibles* tab on page 166 for more information.



The **Lockdown Information** box is where you should input info if an inmate is going to be placed on lockdown. You can add the reason for the lockdown, the date the lockdown ends, and specific restrictions for this inmate.



Finally, fill out the **PREA** tab if it applies to this incident.



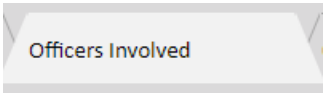
Add the **PREA Disposition Date** and then the **Disposition** result at the drop-down.





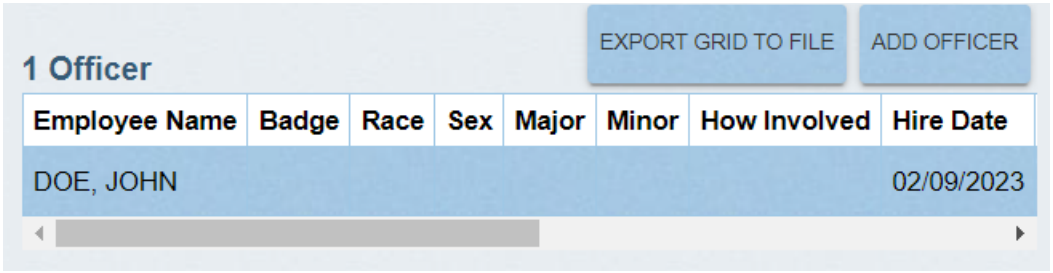
When you finish, click **Save** to save the inmate entry.

Officer Tab

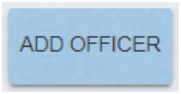


The **Officer** tab lets you record any officers that were involved in an incident and details relevant to the incident. To view, edit, or delete a current entry, double-click an entry from the table.

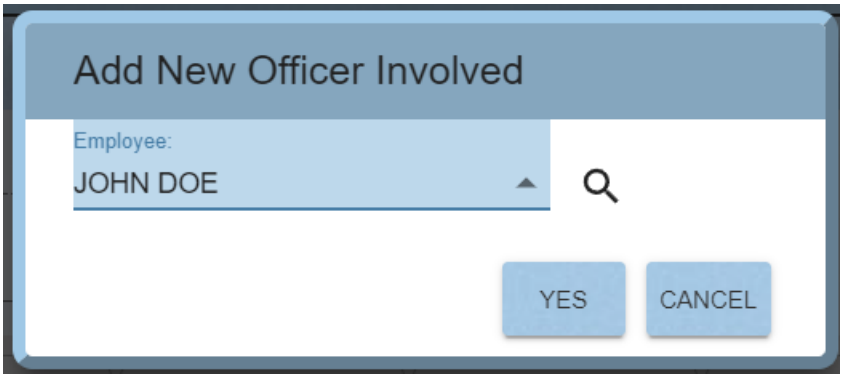
When you add a new entry, you should fill out only the tabs you need to fill out to track information and then save it. Details are provided for each of the sub-tabs below, although each sub-tab is relatively intuitive. Add information as needed.



In order to add a new entry, click the **Add Officer** button.



Click the magnifying glass (🔍) icon to search for an officer. Enter relevant name or identifying info and then click **Lookup**.



This will open the officer tab so you can edit information on how the officer was involved.

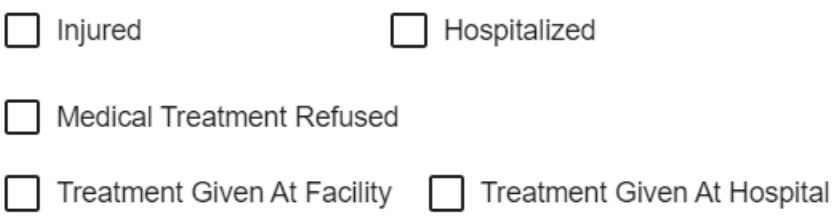
First, add how the officer was **involved** from the dropdown menu.



How Involved typically relates to the officer's job or relation to the incident:



Now, you can check the appropriate **Medical Checkboxes** for info on when an officer is injured or treated:



Further information should be entered in relevant medical info software or notes here in iSOMS.

Now you can add information to any relevant subtabs: *Supplements, Injury, Force Applied.* Fill out what is needed and feel free to leave the rest blank. When finished, click **Save** at the bottom of the tab.

Officer Involved Tabs continued on next page



The officer writing the report can add supplements to this record here. Click **Add Supplement** to add a personal supplement record.

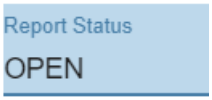


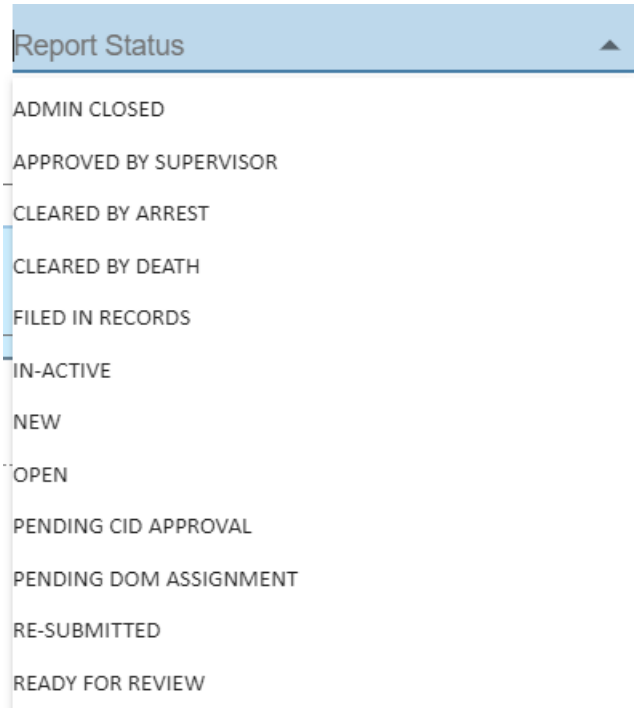
Add the **Reason** for the supplement in the dropdown.



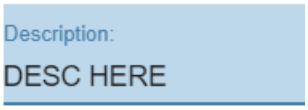


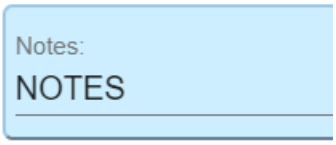
Add the **Report Status** to reflect the status of the supplement.





Now add a **Description** and **Notes**:



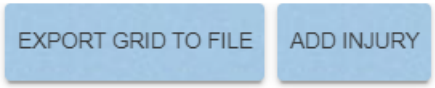


Supervisors should approve the report here by clicking the **Approve Report** button.





Now add if any **Injuries** occurred to this officer. Click **Add Injury** to add a new entry.





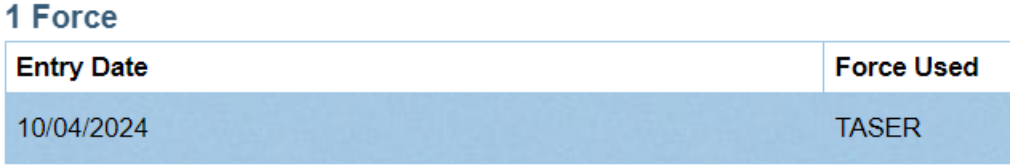
Select the injury type from the list and click **Save**.





Record if there was any **Force Applied** by this officer under this tab.
Click **Add Force** to add an entry.



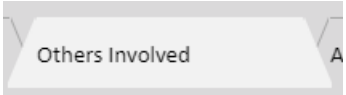


Select the force type from the list, and if the force was *presented*, *used*, and/or *effective*.

Then click **Save**. This concludes filling out the officer entry. Click **Save** on the officer tab.



Others Involved Tab



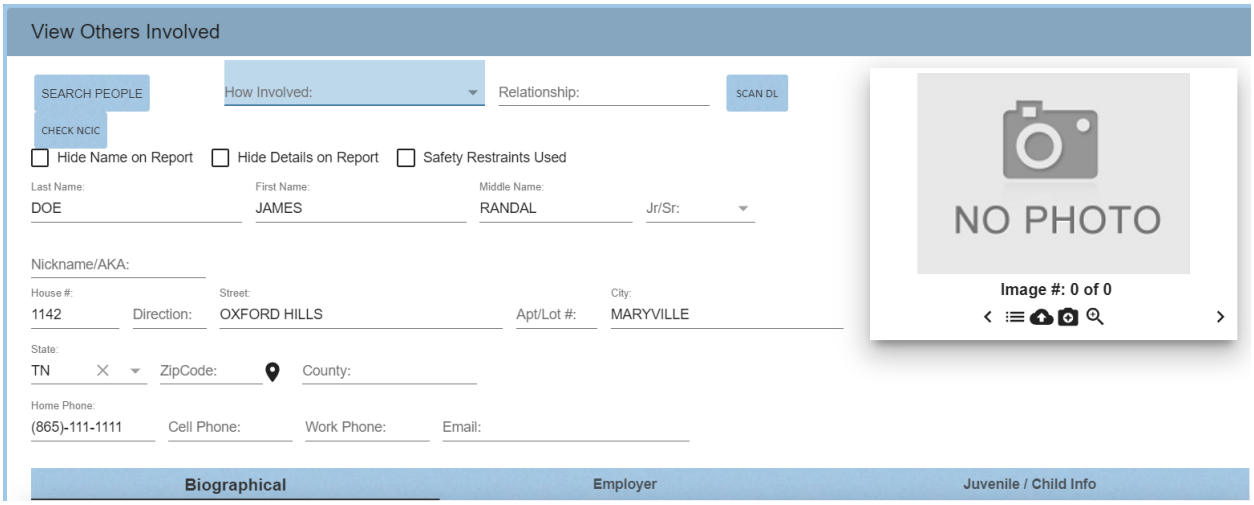
The **Other Involved** tab lets you record any other individuals (besides officers and inmates) that were involved in an incident and details relevant to the incident. To view, edit, or delete a current entry, double-click an entry from the table.

When you add a new entry, you should fill out only the tabs you need to fill out to track information and then save it. Details are provided for each of the sub-tabs below, although each sub-tab is relatively intuitive. Add information as needed.



In order to add a new entry, click the **Add Person** button. Confirm you want to add a new person involved, and then you will see the options to fill in the fields.

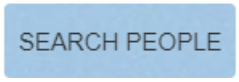




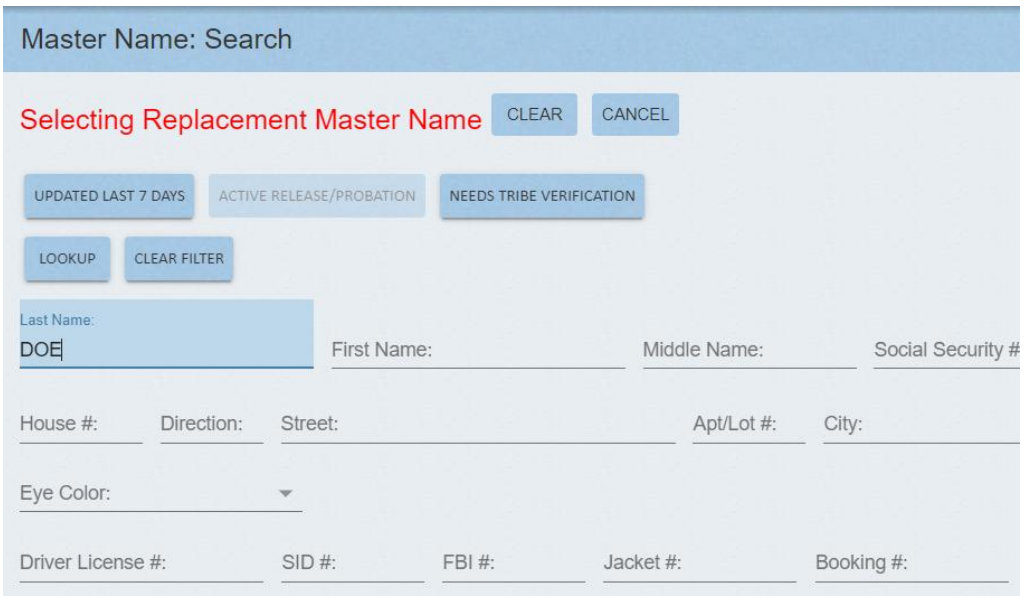
The fields at the top list the person's involvement and relationship to the inmate(s) involved. Then identifying fields are below, along with additional headers to add extra info such as *Biographical, Employer,* and *Juvenile / Child Info*. For details, see below.

Quick Fill from Master Names

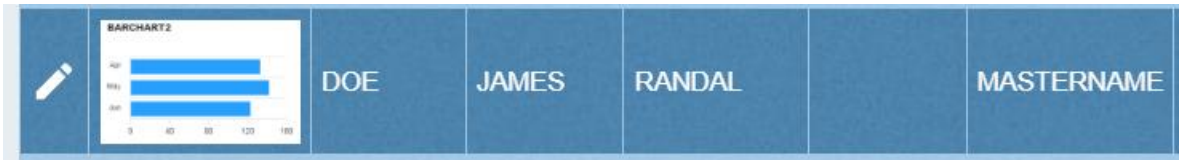
If you already have information on someone as a Master Name, then you can add it quickly by clicking the **Search People** button in the upper left.

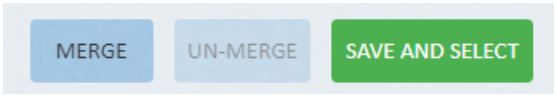


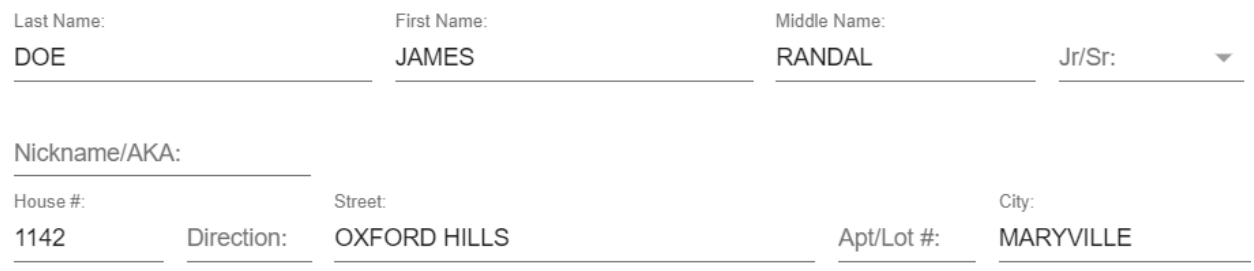
This will open the Master Name search screen. Input a name and other identifying info (such as DL number or SSN, etc.), then click **Lookup.**



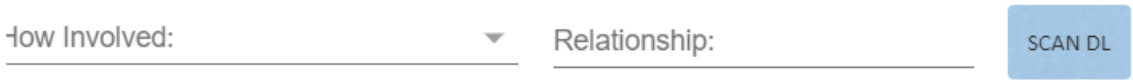
Select the person from the list to add them, and then click **Save and Select** in the *Others Involved* tab. This will autofill information you have on them.







Filling in Information



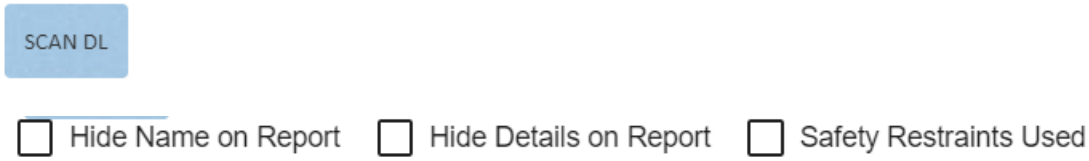
First, fill in **How Involved** dropdown with how the person is connected to the incident.



Add the **Relationship** this person has to the inmate(s) involved.



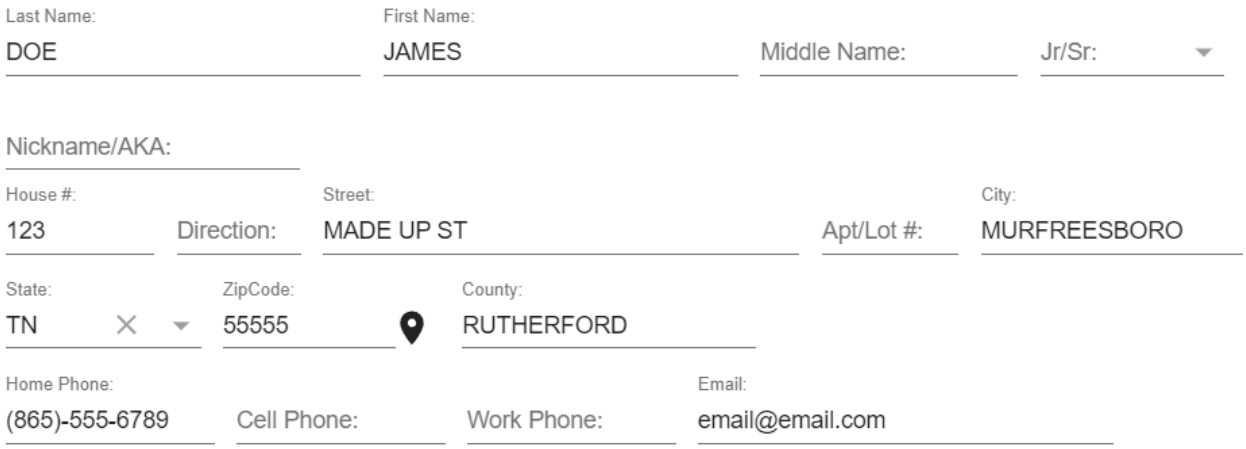
Now you can scan the person's driver license if you click **Scan DL**.



If you need to hide this name or details about the report, check **Hide Name** or **Hide Details**.

If the person had to be restrained, check **Safety Restraints Used.**

Now fill out the information about the person:



Headings

Below the main fields, the headings are available to type additional information about the person.

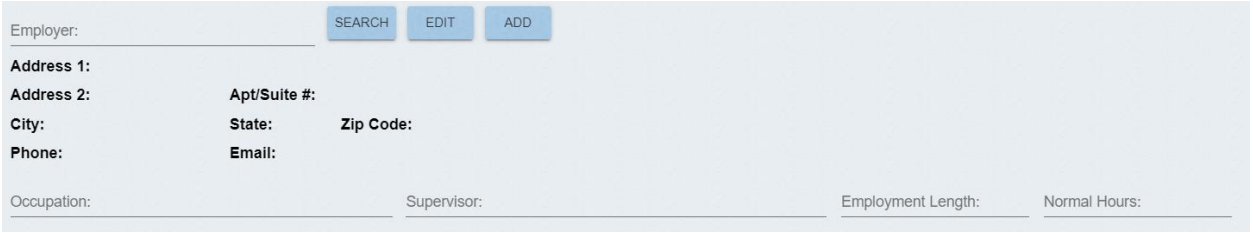


Fill in the biographical information under this heading, including SS and DL numbers.



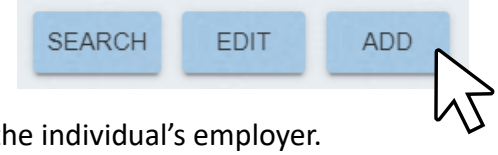


Here you can add an employer record. The Employer system works by storing records of employers. This makes it so that you do not have to continuously re-enter the same information on the same business.

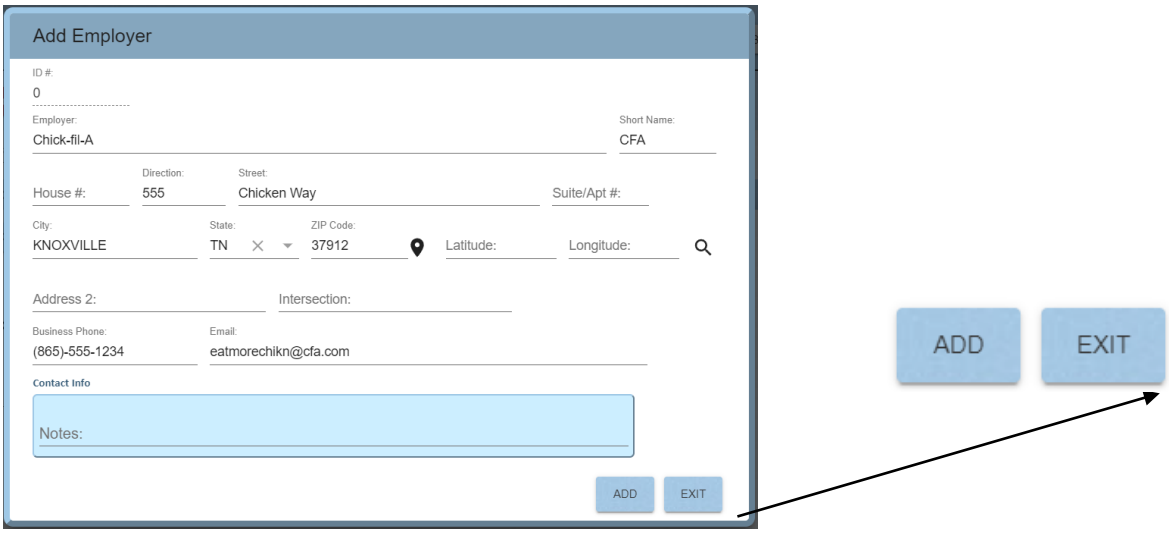


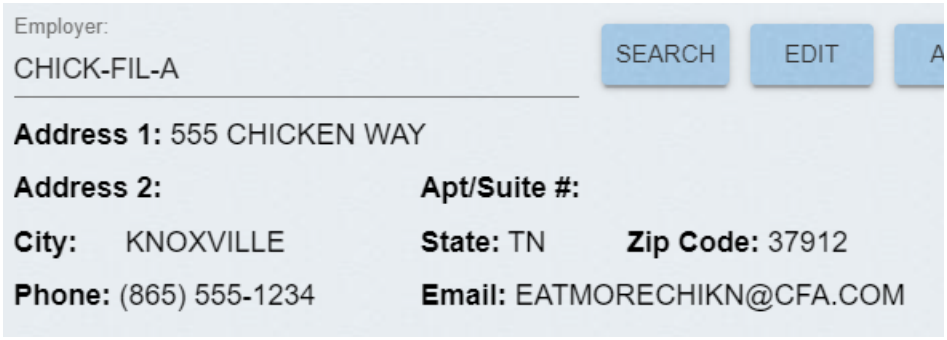
To add a new Employer:

Click **Add** to add a new employer.



Enter the employer information in the window, click **Add** at the bottom of the window, and then this will be marked as the individual's employer.





To edit a current Employer:

Click **Edit** to edit the inmate's current employer.



Click **Save** when you are done editing this employer.

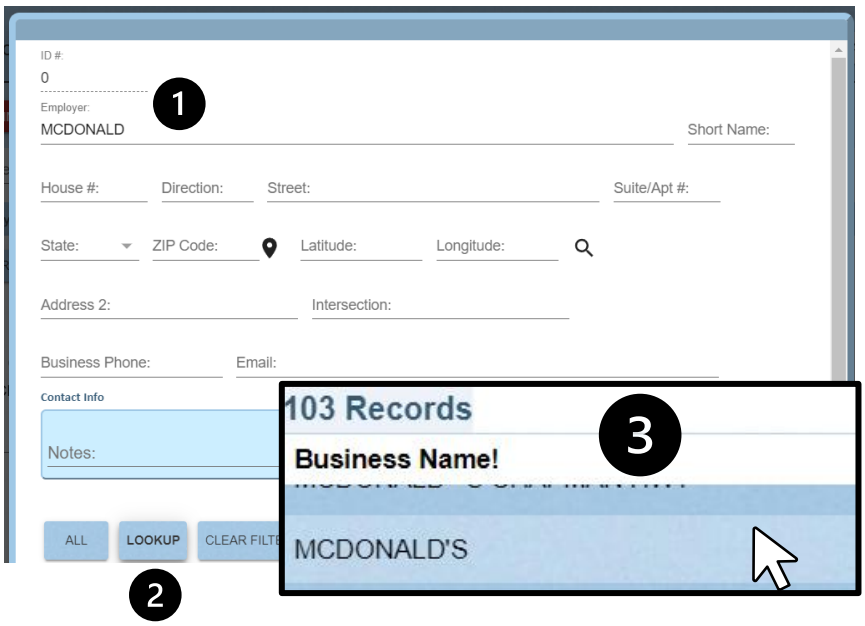


To use an existing Employer:

Click **Search** to use an existing employer.

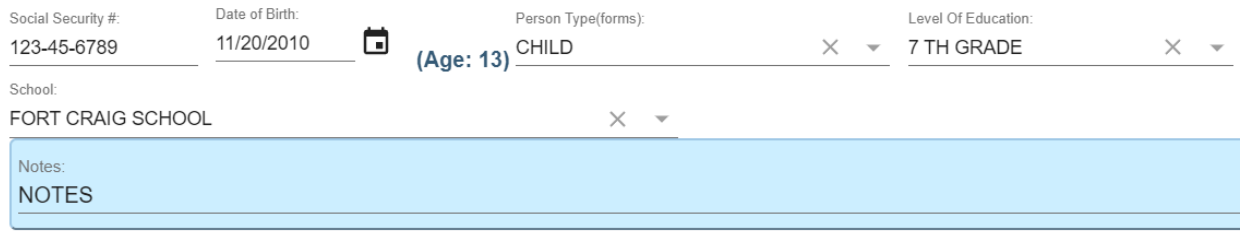


1. Enter the name or other identifying info and click the **Lookup** button near the bottom of the window in order to find existing employer records.
2. Then scroll down the window and select the correct employer from the list by double-click their record.



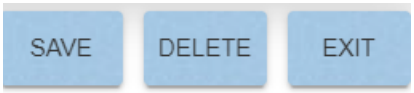
Juvenile / Child Info

Here you can fill out information on the individual if they were a juvenile / child.

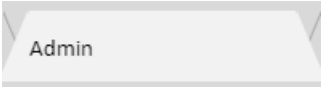


Add the **Level of Education** and **School** along with any necessary **Notes**.

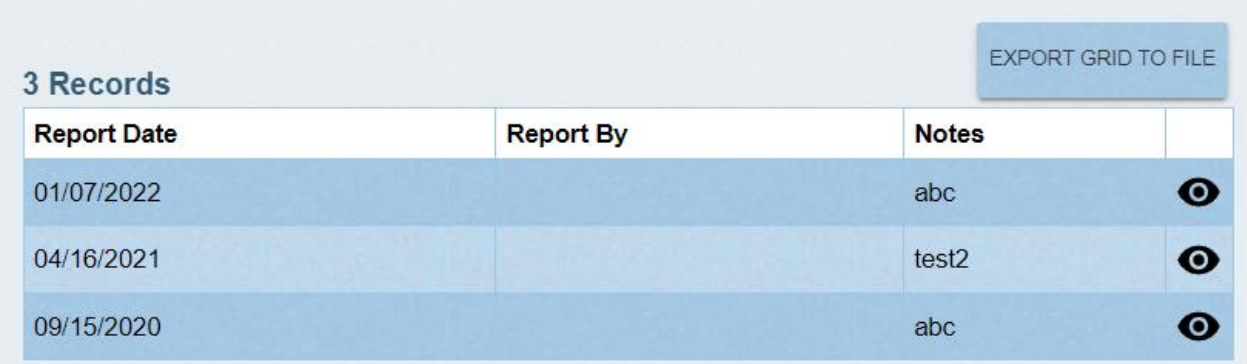
This completes filling out the *Others Involved* entry. Click **Save** in the bottom right to finish this entry. If you have any more to add, simply repeat the process.



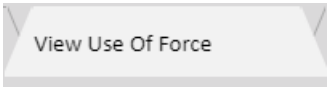
Admin Tab



The **Admin** tab lists all notes from the *Supplements* reports provided by officers (under the *Officers* tab -> *Supplements* tab, pg. Officer Tab402). You can use this tab to quickly view the notes from those reports. **This tab is read-only.**



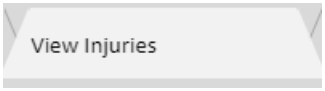
View Use of Force Tab



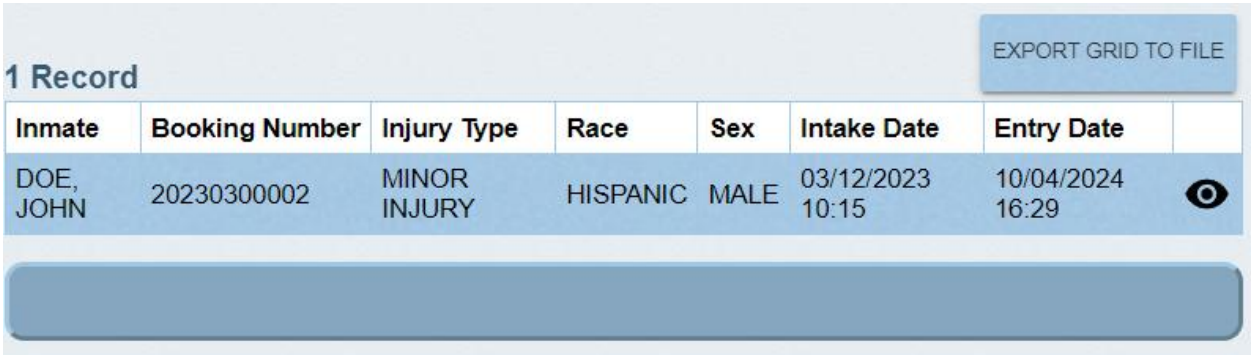
The **View Use of Force** tab lists all Force Used from the *Force Used* reports (under the *Inmates* tab -> *Force Used* tab, pg. Officer Tab393). You can use this tab to quickly view the information from those reports. **This tab is read-only.**



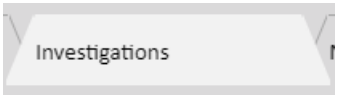
View Injuries Tab



The **View Injuries** tab lists all Injuries from the *Injuries* reports (under the *Inmates* tab -> *Injuries* tab, pg. Officer Tab393). You can use this tab to quickly view the information from those reports. **This tab is read-only.**



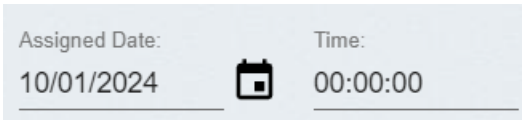
Investigations Tab



The **Investigations** tab lets you record general information about the investigation into the incident.



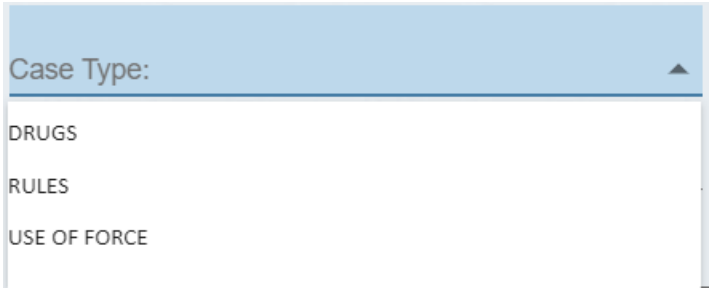
First add the **Assigned Date** and **Time:**



Now add who the case is **Assigned To**:

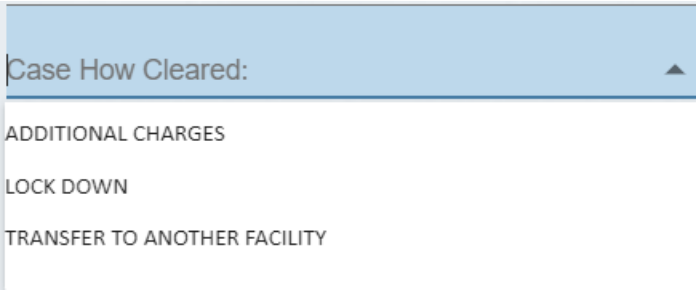


Then add the **Case Type** based on how the incident occurred:

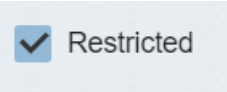


Continued on the next page

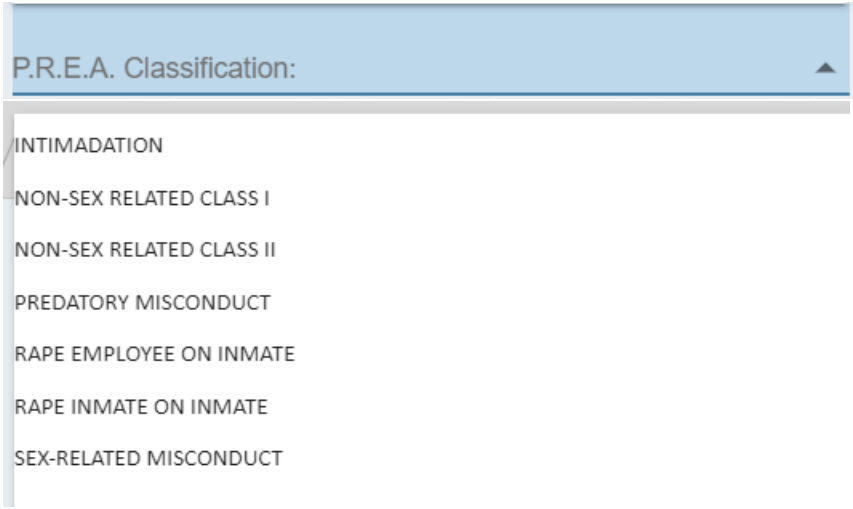
Once the case is cleared, add the reason on **Case How Cleared**:



If this case report should be restricted on who views it, check the **Restricted** box.



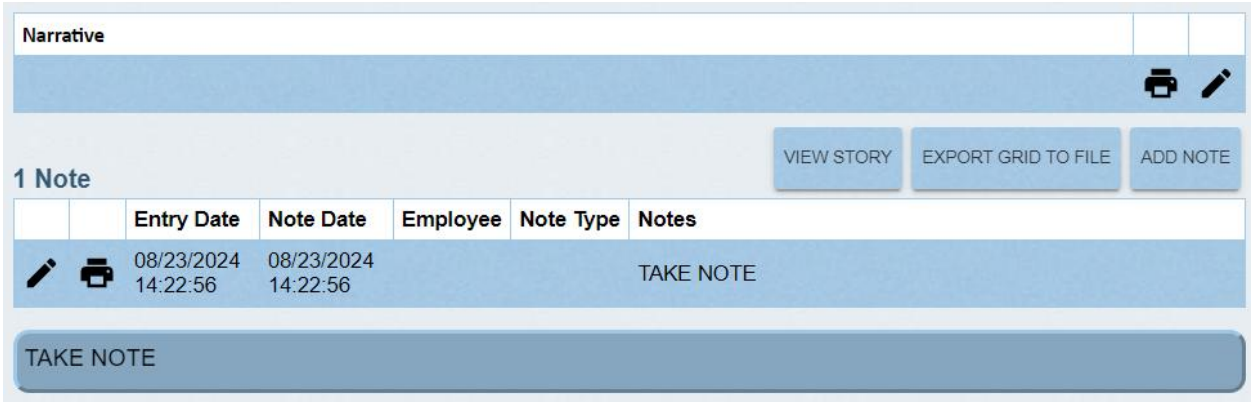
If this incident has a **P.R.E.A. Classification,** add that here. Additional details should be added under the *PREA Classification, PREA Attachments,* and *PREA Supplements* tabs.



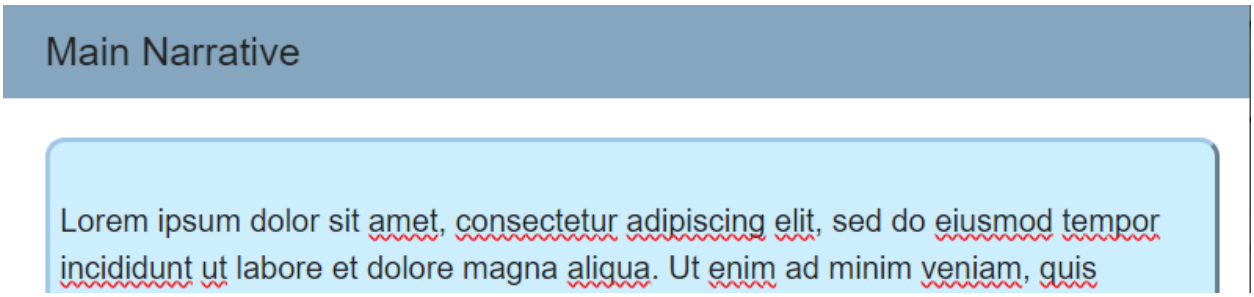
Notes Tab



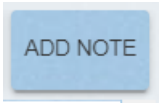
The **Notes** tab is used to view or add notes pertinent to the record. Double-click on any entry in the table to edit or view it.

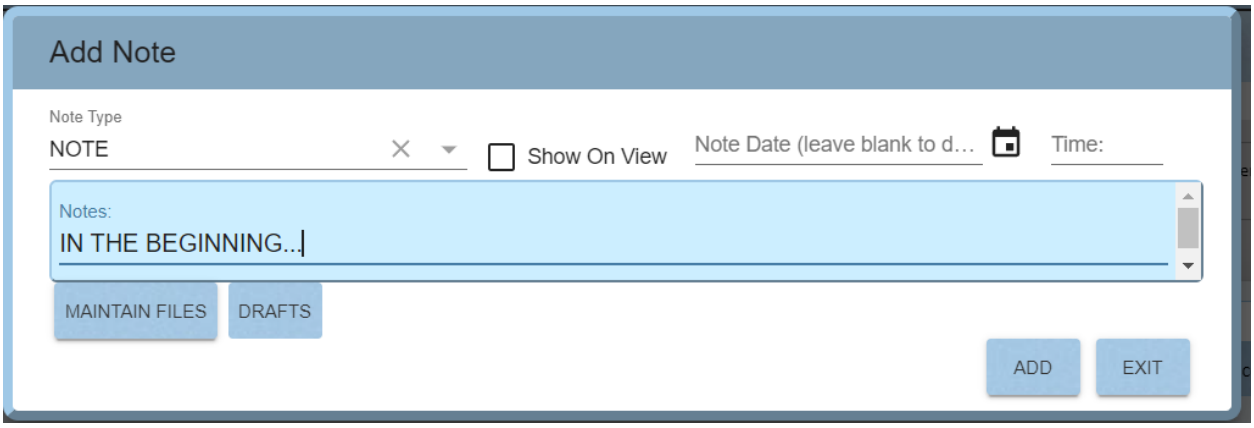


Narrative acts as an area where you can add a long note. This is useful when you want to add important or long form notes that won't be mixed in with the rest of the short notes.



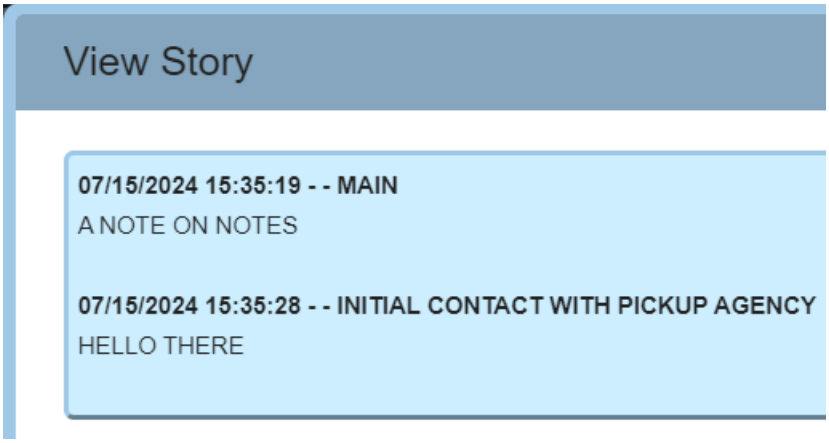
Use **Add Note** to add a new note.





The **View Story** button will show all notes (except Narrative) that have been added on one page.





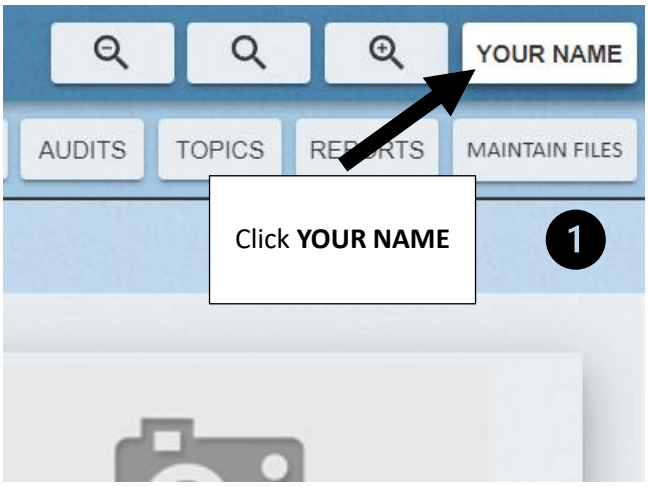
Images Tab

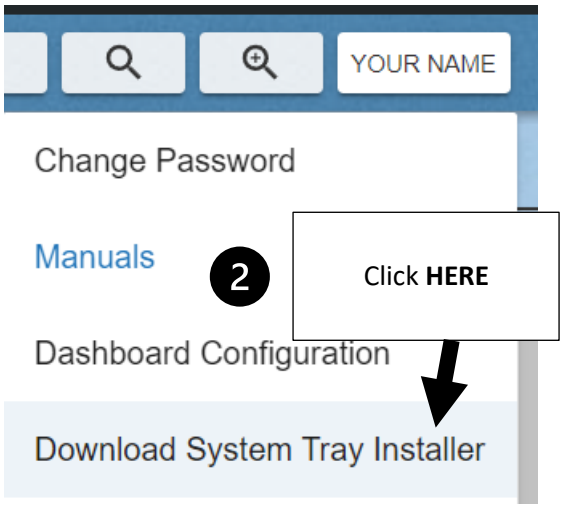


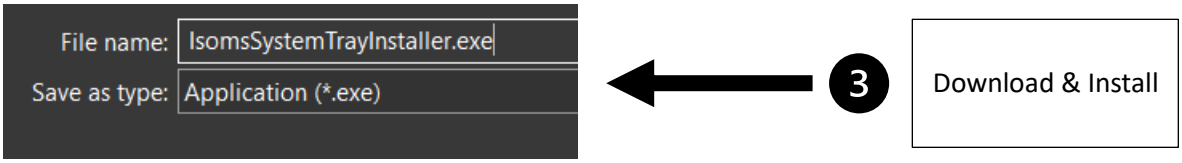
The **Images** tab is used to view, download, or add images. You can add a single image at a time or multiple images at a time. Click **Add Image** to add a single image.



To add multiple images at a time, you will need the System Tray Installer downloaded to the computer you are using. The System Tray Installer can be found on the iSOMS home page by clicking on the button in the upper right with your username. Once you click on that, you will get a drop-down list, and **Download System Tray Installer** is one of the options. Download and install it on this computer.

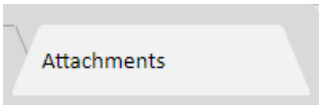




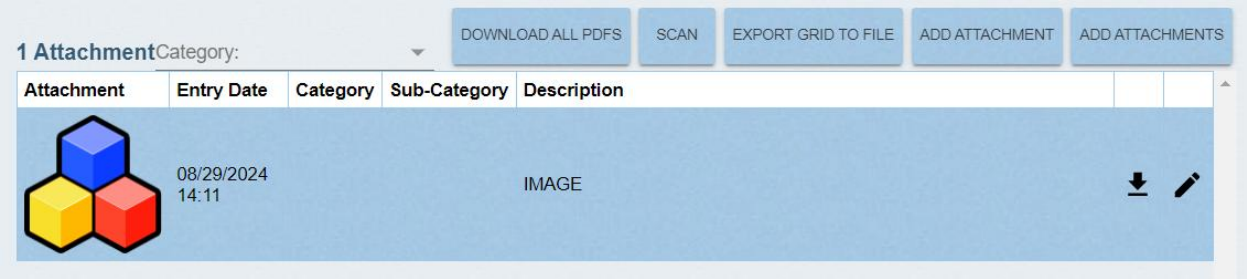


After you have the System Tray Installer on the computer, you can now use the **Add Images** button to upload multiple images at once if necessary.

Attachments Tab



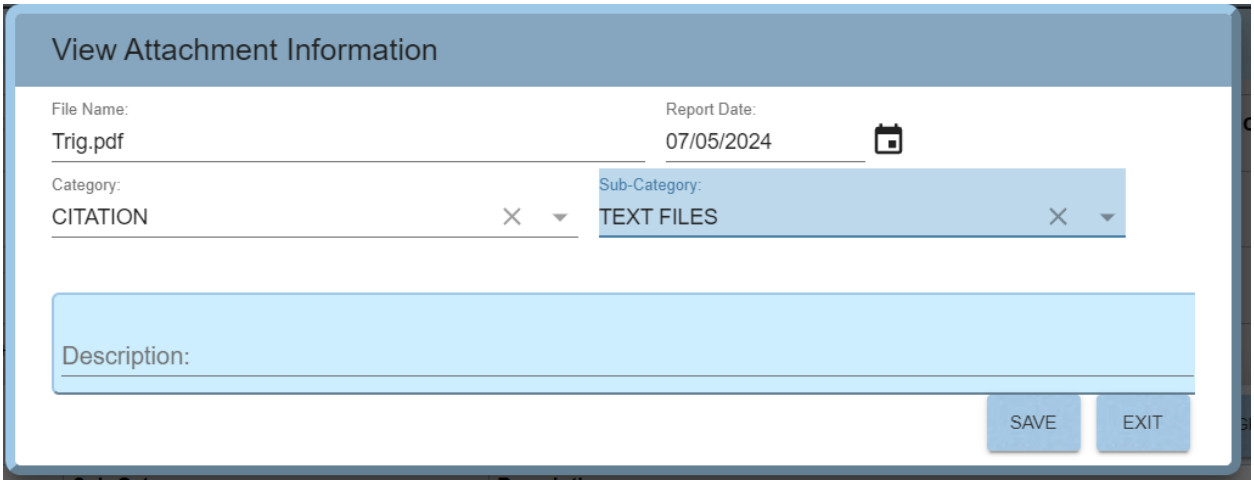
The **Attachments** tab is used to view, download, or add attachments. Double-click a file entry to view the record for the attachment or click on the icon to download the attachment to the computer.



You can add a single attachment at a time or multiple attachments at a time. Just like above with images, you will need the System Tray Installer downloaded to the computer you are using to add multiple attachments at once. See the *Image* tab instructions on the previous few pages for instructions on installing the System Tray Installer.

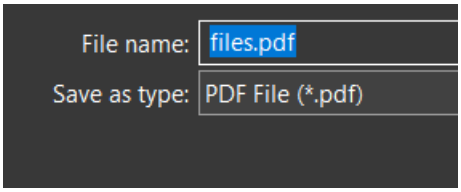
Click **Add Attachment** to add a single attachment or click **Add Attachments** to add multiple attachments at the same time. Choose the attachments from the computer, then add the appropriate category and sub-category for the file.



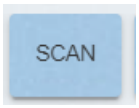


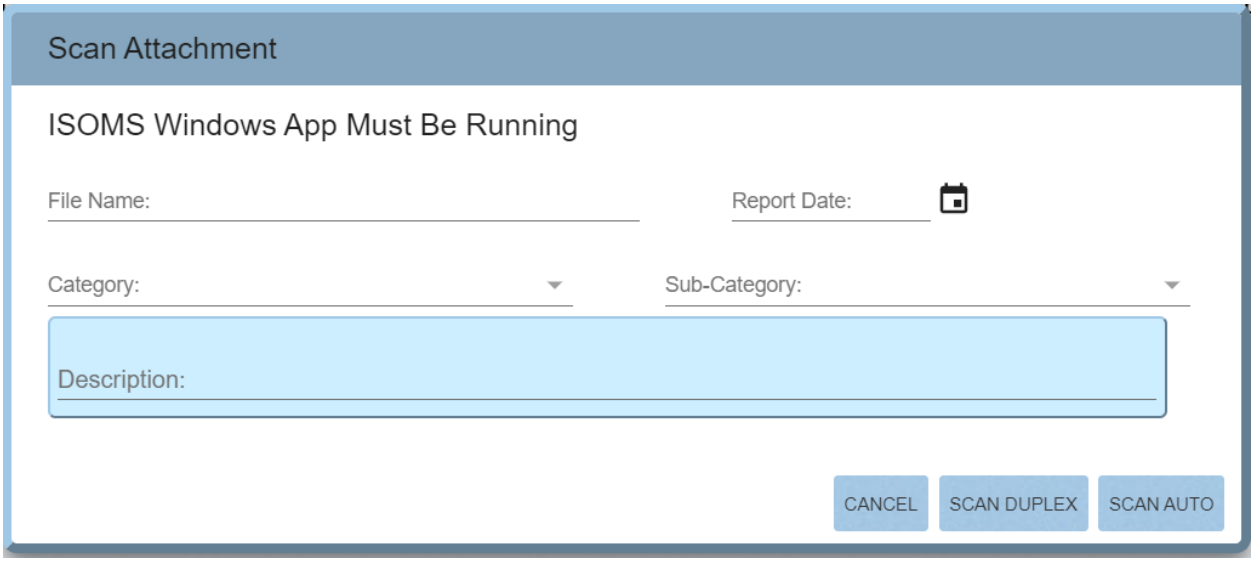
You can also **Download All PDFs** at once by clicking the appropriate button.



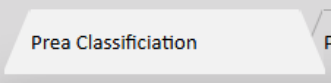


If you have the iSOMS Windows App, you can use **Scan** to scan files into the attachments.

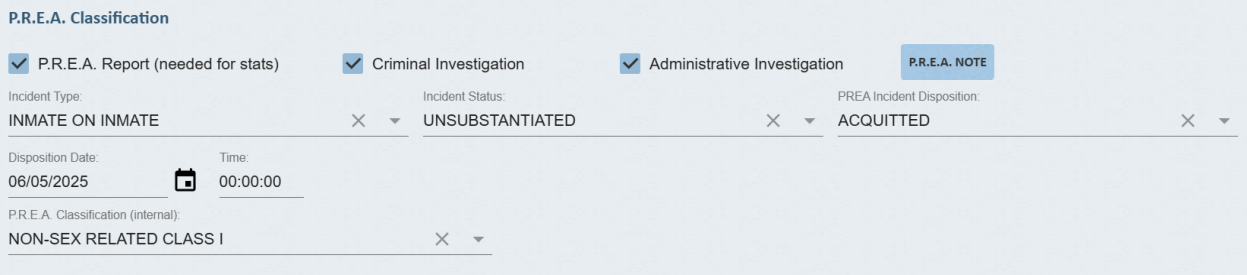




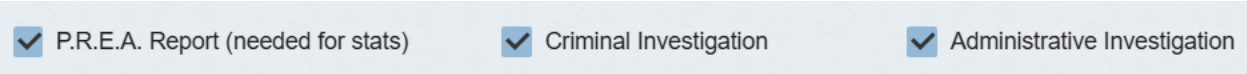
PREA Classification Tab



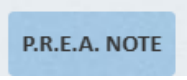
The **PREA Classification** tab lets you record details on the classification of this incident and should be filled out if this is a PREA report.



Mark the appropriate boxes if this report is a **PREA Report, Criminal Investigation,** and/or **Administrative Investigation.** Note that these boxes are used for searches and stat reports, so it is important to mark them to keep your statistics in order.

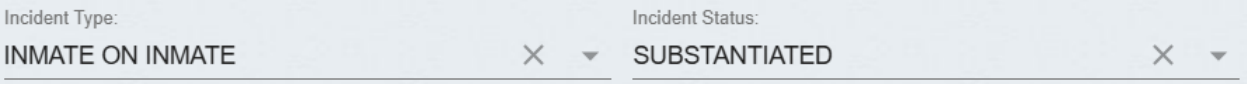


If you need to add a note specific to PREA, use the **P.R.E.A. Note** button:





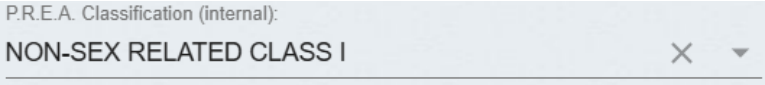
Now fill in information about the PREA report. Add the **Incident Type,** such as *Inmate on Inmate* or *Staff on Inmate*. Use **Incident Status** to record if the incident is *Substantiated, Ongoing, Unfounded,* or *Unsubstantiated.*



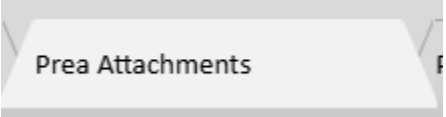
Once the investigation has been resolved, you can add the **PREA Incident Disposition, Disposition Date,** and **Disposition Time.**



You can add an **internal PREA Classification** if needed.



PREA Attachments Tab

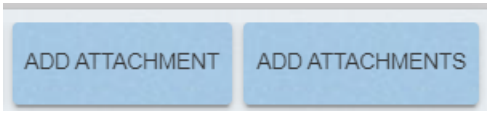


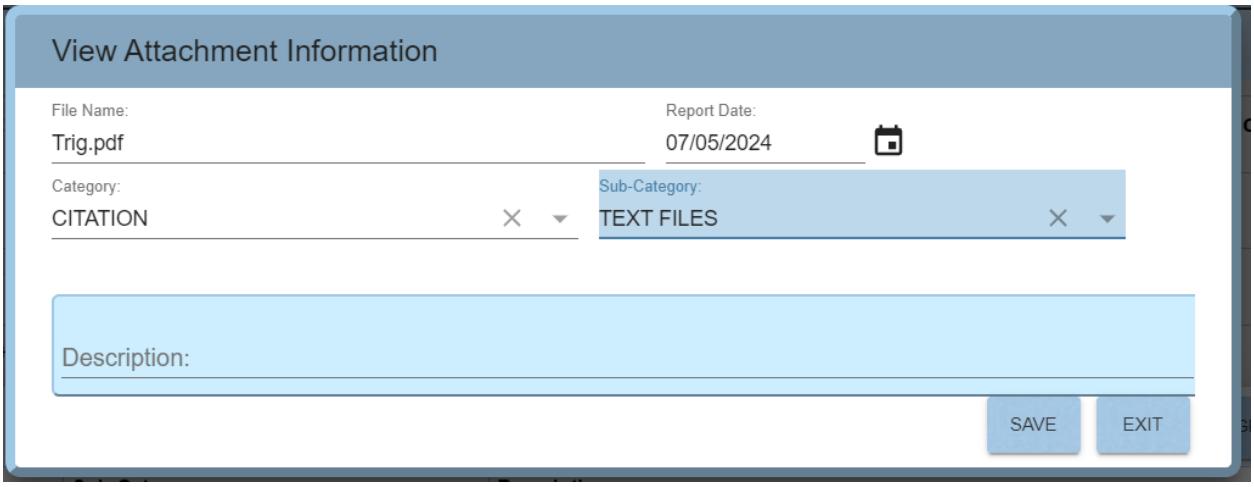
The **PREA Attachments** tab is used to view, download, or add attachments related specifically to PREA reports. This tab functions similarly to the attachments tab. Double-click a file entry to view the record for the attachment or click on the icon to download the attachment to the computer.



You can add a single attachment at a time or multiple attachments at a time. Just like above with images, you will need the System Tray Installer downloaded to the computer you are using to add multiple attachments at once. See the *Image* tab instructions on the previous few pages for instructions on installing the System Tray Installer.

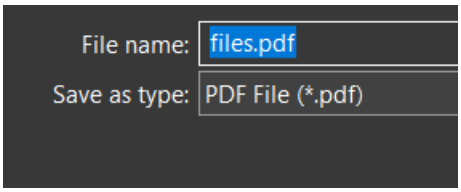
Click **Add Attachment** to add a single attachment or click **Add Attachments** to add multiple attachments at the same time. Choose the attachments from the computer, then add the appropriate category and sub-category for the file.



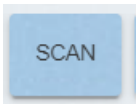


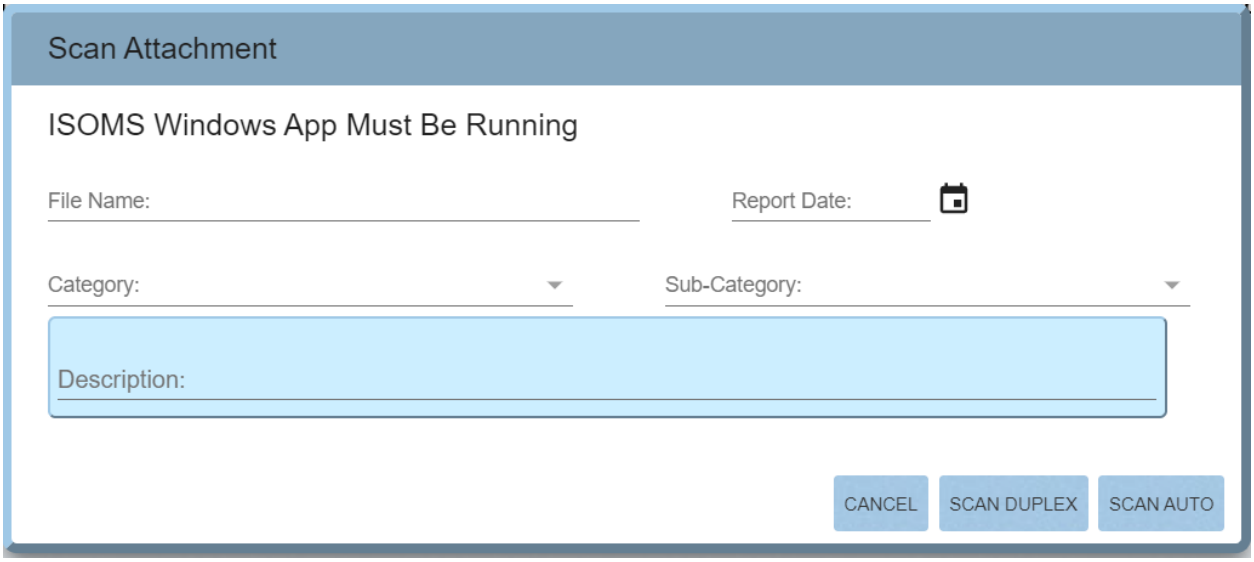
You can also **Download All PDFs** at once by clicking the appropriate button.



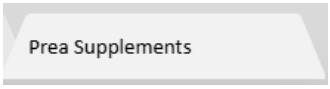


If you have the iSOMS Windows App, you can use **Scan** to scan files into the attachments.

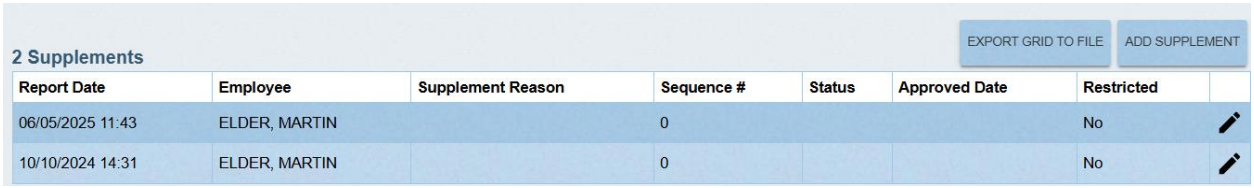




PREA Supplements Tab

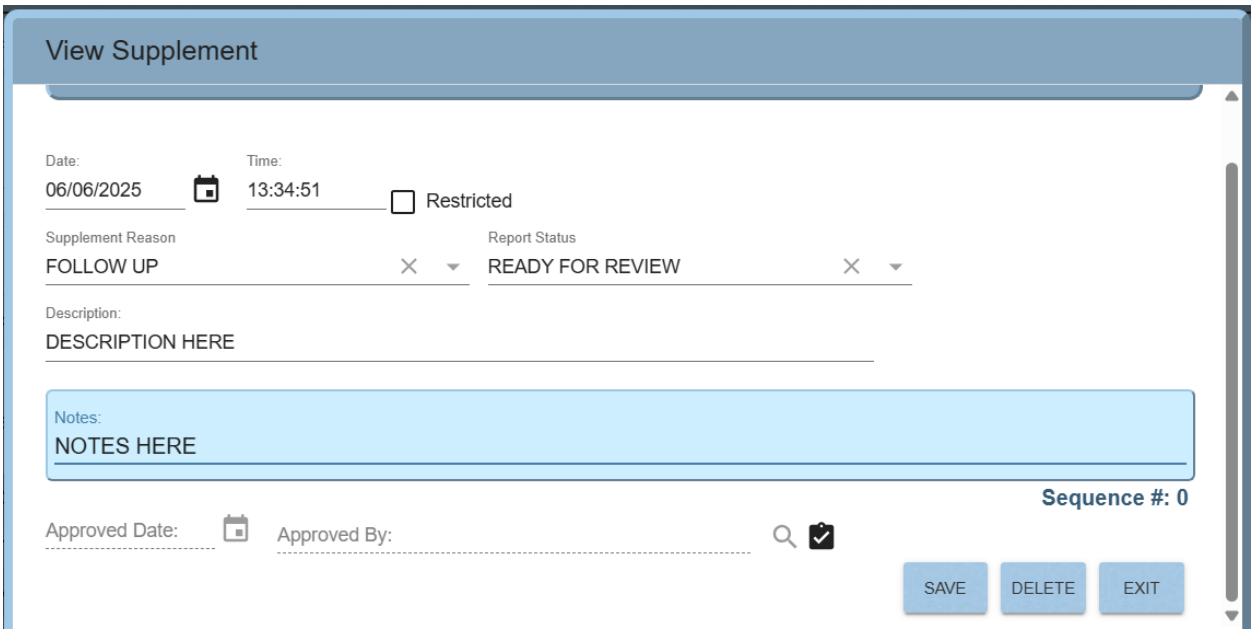


The **PREA Supplements** tab is where you can add supplements specifically related to PREA. To view, edit, or delete a current entry, double-click an entry from the table.



To add a new supplement, simply click **Add Supplement** in the upper right.





The **Date** and **Time** will automatically be set to the current date and time.



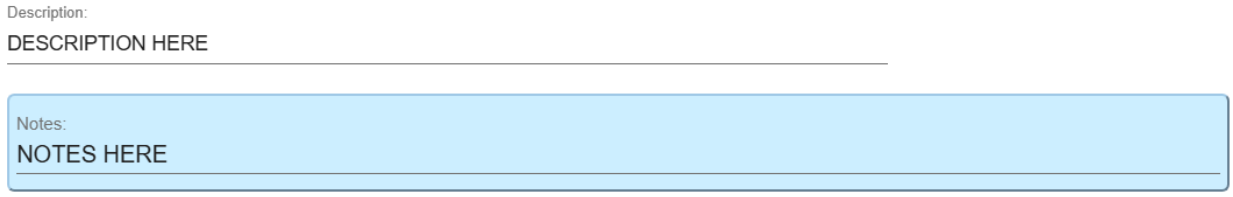
If this supplement should be restricted, check **Restricted.**



Add the **Supplement Reason,** such as *Case Review, Extra Patrol Report, Follow Up,* or *Investigation Report.* Then add the **Report Status,** like *New, Open, Ready for Review, Admin Closed,* etc.



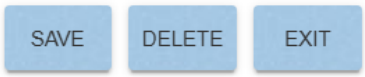
Add the **Description** for the supplement and any additional **Notes** for the supplement here.



Once a supplement is ready to be approved by a Supervisor, they can click on the approve report button near the bottom.



When finished, click **Save**. If you need multiple supplements, simply repeat the above process.



Jail Incident Reports

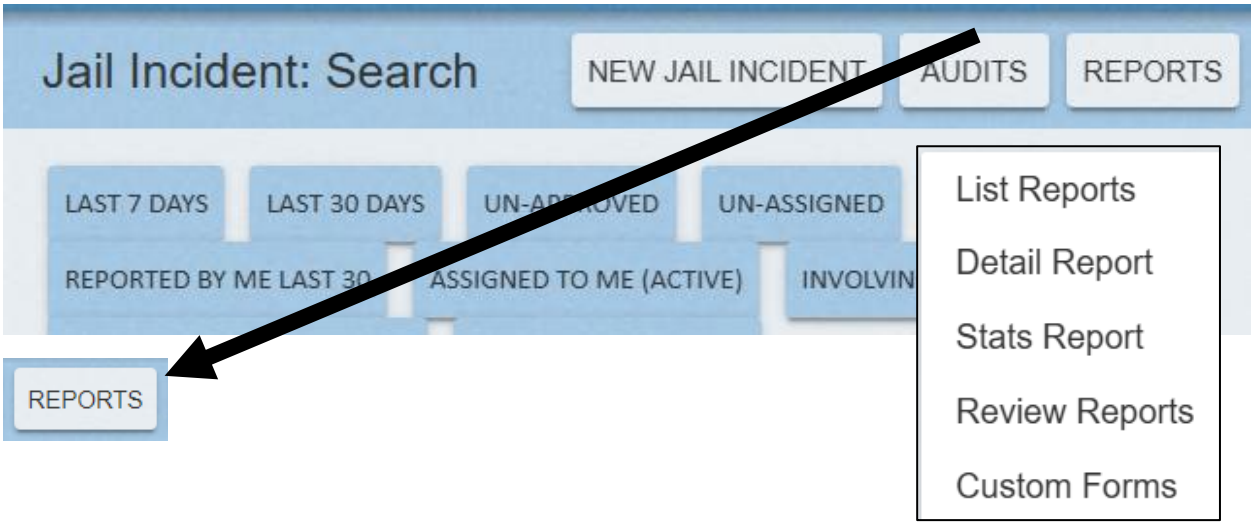
iSOMS has the capability to allow you to print different types of reports for jail incidents.

To access the reports, begin on the iSOMS home screen. Navigate to:

Corrections → Inmate Tracking → Jail Incident Reports

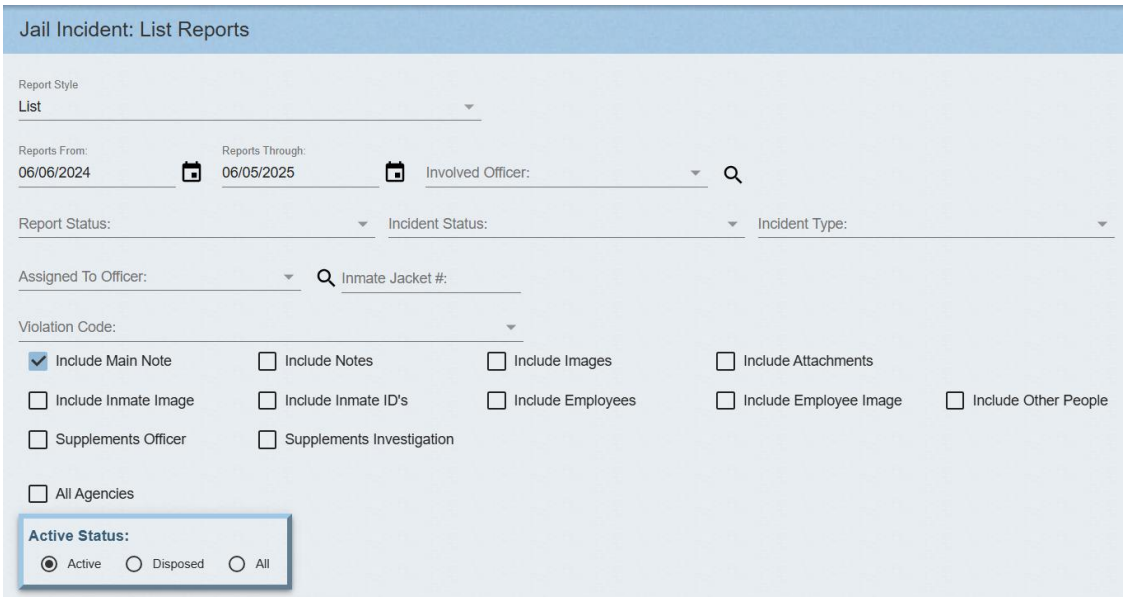


Now click on the **Reports** button in the upper right corner and select the report you wish to run. Different reports are explained over the next set of pages.

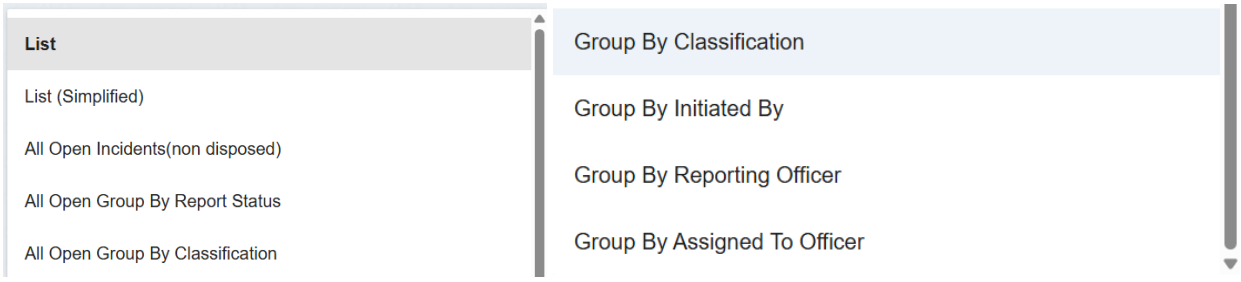


List Reports

This report displays jail incident reports in your iSOMS records over a certain date range. In this way you can see an overview of jail incidents over your chosen time period. Add the start and end date in **Reports From** and **Reports Through.**



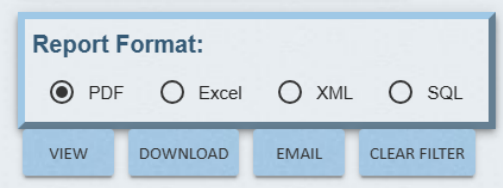
Report Style has many different layout and sorting options, such as *List, Open Incidents, Group by Classification, Group by Assigned Officer*, and more. Pick the one most relevant to your desired result.



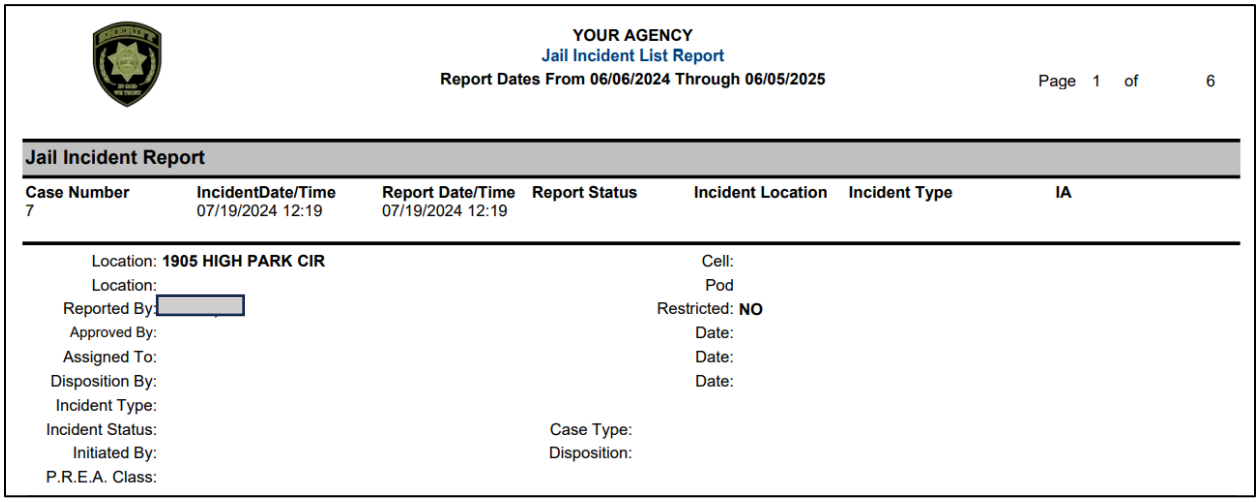
You can add certain filters to reduce the list if desired. Also choose what you would like included on the report, such as images, employees, other people, supplements, etc:



Now, with your chosen parameters, click **View** or **Download** to view the report.



List Report



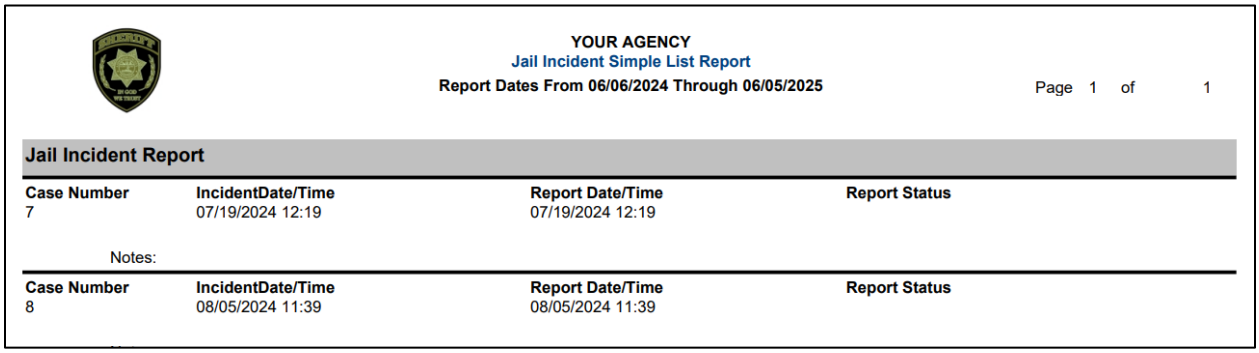
YOUR AGENCY
Jail Incident List Report
Report Dates From 06/06/2024 Through 06/05/2025
Page 1 of 6

Jail Incident Report

Case Number	IncidentDate/Time	Report Date/Time	Report Status	Incident Location	Incident Type	IA
7	07/19/2024 12:19	07/19/2024 12:19				

Location: **1905 HIGH PARK CIR** Cell:
Location: Pod
Reported By: Restricted: **NO**
Approved By: Date:
Assigned To: Date:
Disposition By: Date:
Incident Type:
Incident Status: Case Type:
Initiated By: Disposition:
P.R.E.A. Class:

Simple List Report



YOUR AGENCY
Jail Incident Simple List Report
Report Dates From 06/06/2024 Through 06/05/2025
Page 1 of 1

Jail Incident Report

Case Number	IncidentDate/Time	Report Date/Time	Report Status
7	07/19/2024 12:19	07/19/2024 12:19	

Notes:

Case Number	IncidentDate/Time	Report Date/Time	Report Status
8	08/05/2024 11:39	08/05/2024 11:39	

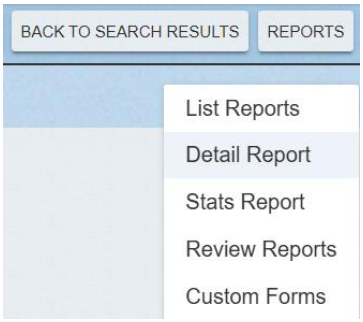
Detail Report

This report displays many details for individual jail incident reports in your iSOMS records.

First, go to the record you want to make a detail report for and open its record in iSOMS.



Then click **REPORTS → DETAIL REPORT** to open the Detail Report screen.





Choose what you would like included on the report, such as images, employees, other people, supplements, etc. And with your chosen parameters, click **View** or **Download** to view the report.



YOUR AGENCY
Jail Incident Report

Page 1 of 1

Case Number	Report Date	Incident Date	Report Status
12	09/19/2024 17:38	05/19/2025 06:36	READY FOR REVIEW

Location: Cell:
Location: Pod
Reported By: Restricted: **YES**
Approved By: Date:
Assigned To: Date:
Disposition By: Date:
Incident Type:
Incident Status: Case Type:
Initiated By: Disposition:
P.R.E.A. Class: **NON-SEX RELATED CLASS I**

Report Notes

Inmate

Inmate Name: **DOE, JOHN**
Booking #: **20230300002**
Intake Date: **03/12/2023** Release Date:
How Involved:
Race/Sex: **HISPANIC / MALE**

Injury To Inmate

MINOR INJURY

ForceId

TASER

Employees Involved

Employee	Race	Sex

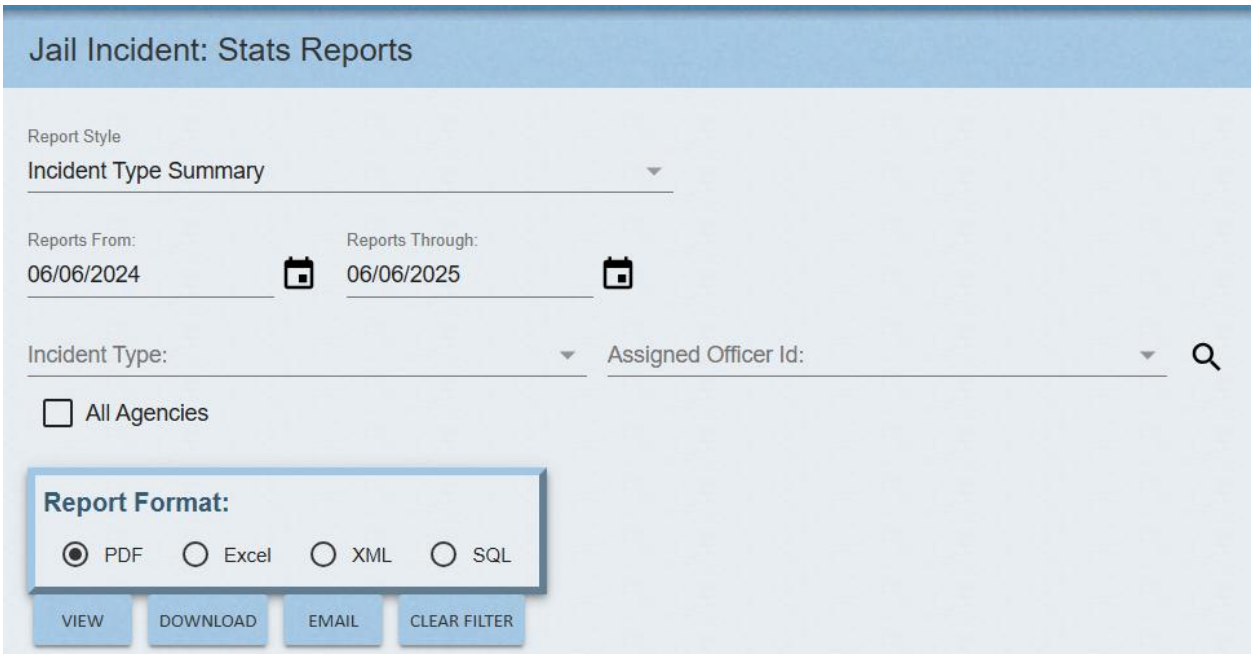
Other People Involved

Name	How Invovled
DOE, JAMES	GUARDIAN TO OFFENDER

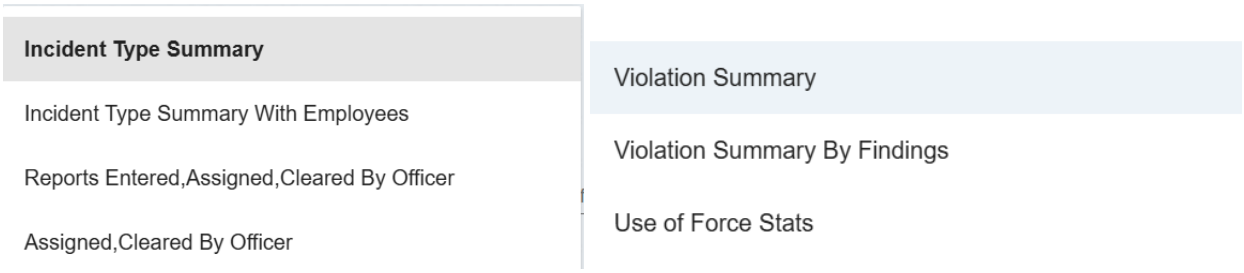
123 MADE UP ST
MURFREESBORO, TN 55555
Race: **HISPANIC** SSN: **XXX-XX-6789** Home Phone: **(865) 555-6789**
Sex: **MALE** DL#: **TN/ 123-45-67890** Work Phone:
Occupation: Cell Phone:

Stat Reports

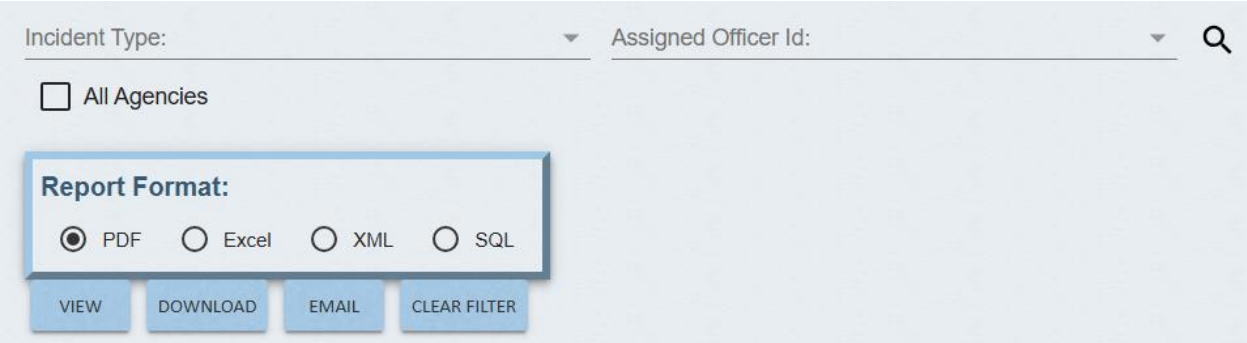
This report displays jail incident stats in your iSOMS records over a certain date range. In this way you can see statistics for your chosen variable over a certain period. Add the start and end date in **Reports From** and **Reports Through.**



Report Style has many different layout and sorting options, such as *Incident Type Summary, Reports by Officer, Violation Summary, Use of Force Stats*, and more. Pick the one most relevant to your desired result.



You can add certain filters to reduce the list if desired, such as only including a certain incident type or certain assigned officers. Now, with your chosen parameters, click **View** or **Download** to view the report.



Incident Type Summary

YOUR AGENCY

Inmate Incident Summary

Report Dates From 06/06/2024 Through 06/06/2025 Page 1 of 1

Incident Type	Count	Percent
No Incident Type	1	12.50
CITIZENS COMPLAINT	1	12.50
CIVIL LITIGATION	1	12.50
FIGHT WITH GUARDS	1	12.50
INCIDENT	1	12.50
PREA	2	25.00
RULES VIOLATIONS	1	12.50

Total Incidents: **8**

Use of Force

YOUR AGENCY

Inmate Incident Use Of Force Summary

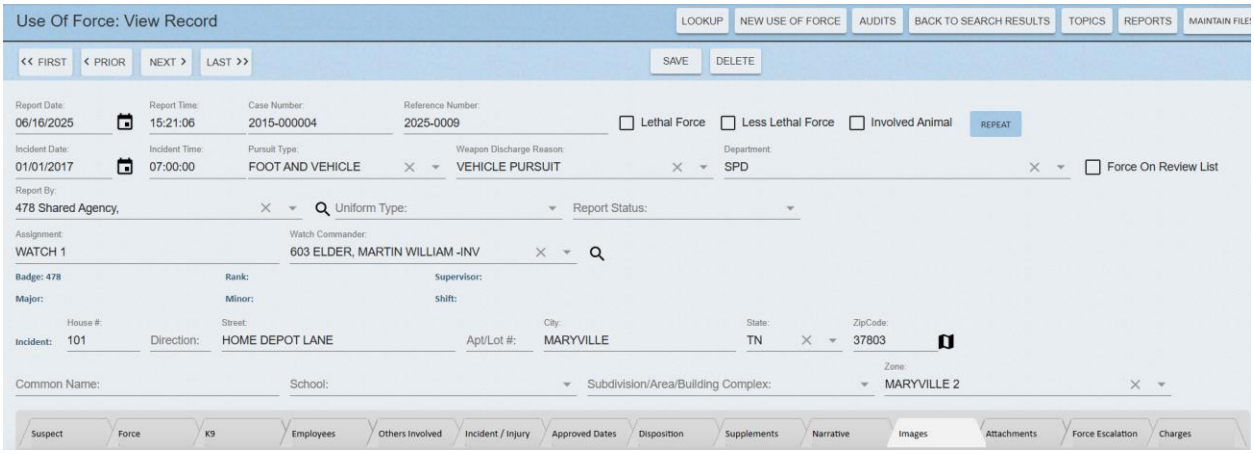
Report Dates From 06/06/2024 Through 06/06/2025 Page 1 of 1

Force Code	Force Type	Count	Percent
No Description Specified	No Description Specified	1	50.00
TAS	TASER	1	50.00

Total Incidents: **2**

Use of Force

The **Use of Force** module lets your agency to record use of force applied. This includes all details surrounding the use of force, including details on the suspect, force applied, parties involved, supplements, charges, and more. This section will explain searching existing use of force records, creating a new use of force record, and filling out a use of force record.



The first part of this section explains searches. If you need explanations on an already existing record, see the *Filling Out a Use of Force Record* to get more information on the different fields and tabs available.

Searching for Existing Use of Force Records

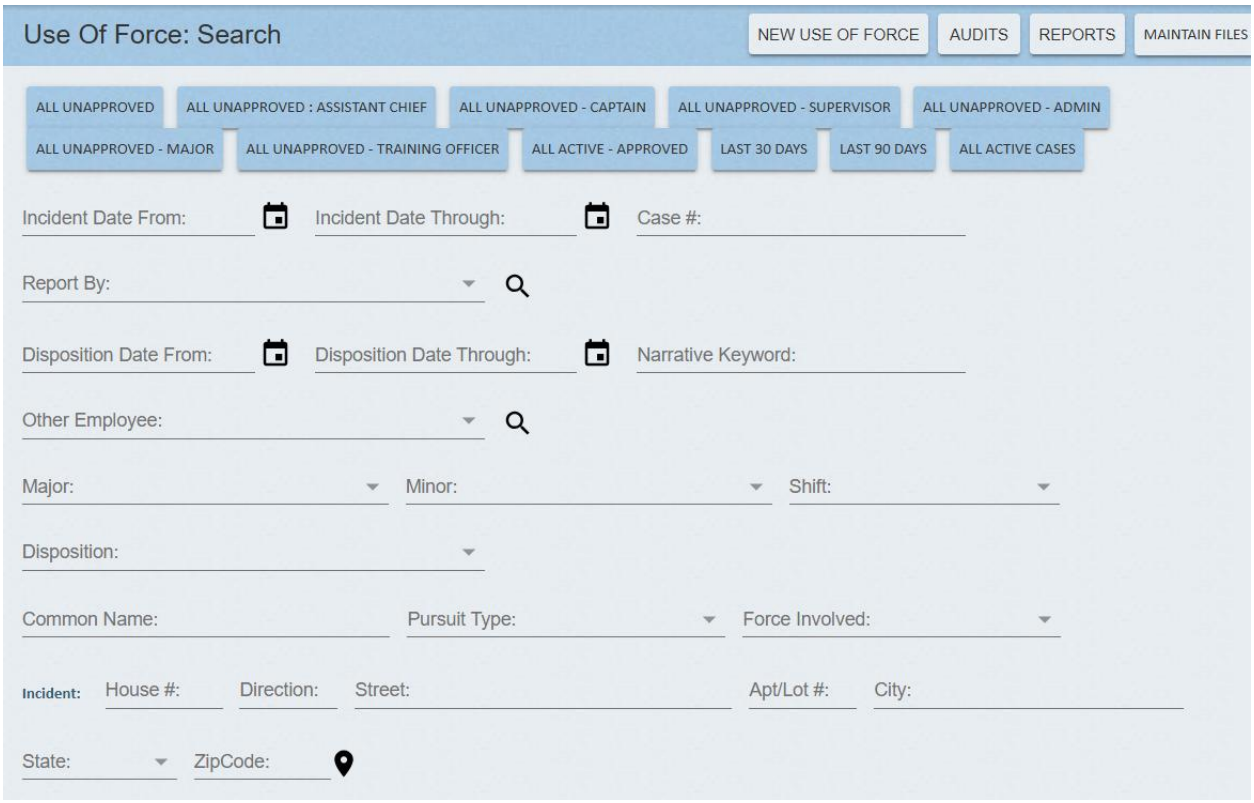
To search existing records, begin on the iSOMS home screen.

Navigate to:

Corrections → Inmate Tracking → Use of Force

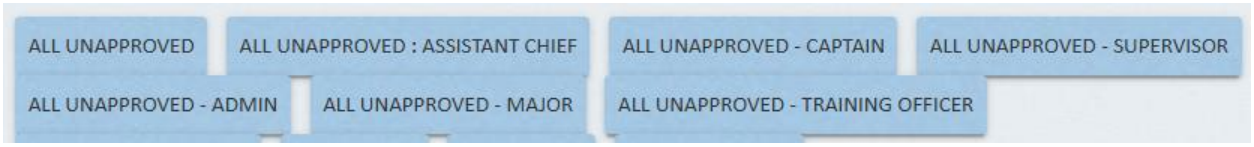


This will open the **Use of Force: Search** screen. Here you can search and filter for different use of force records. You can either use the blue buttons to do *quick searches* or enter information in the fields to do *standard searches.*

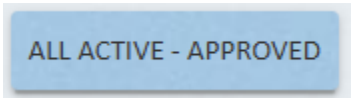


Quick Searches

Several different quick searches are available by using the blue buttons.



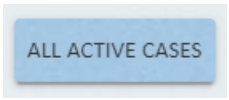
Unapproved lets you quickly find reports that have been written but haven't been approved by a supervisor. The quick searches are divided into the given supervisor level which has not approved a report, so you can click the appropriate button to find ones that person has not yet approved. (For example, if you are an Assistant Chief, click **All Unapproved: Assistant Chief** to find records you have not yet approved.)



All Active – Approved shows all use of force records that are active *and* approved.



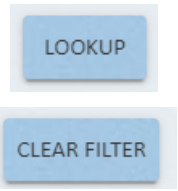
Last 30 Days and **Last 90 Days** will show you all the reports in the specified recent time periods.



All Active Cases simply returns all records that are active (i.e. have not yet been closed.) This *does* include unapproved and unassigned use of force records.

Standard Searches

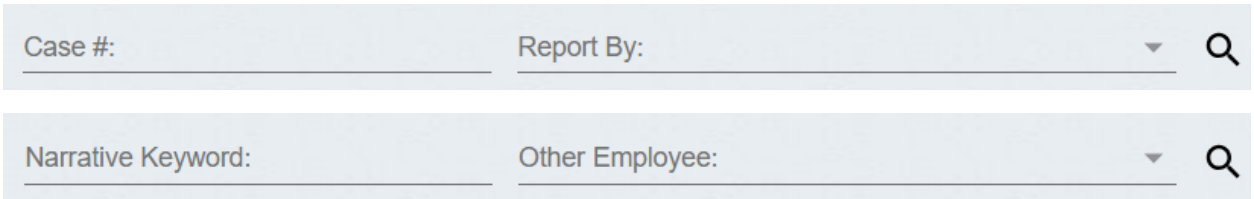
Various fields are available if you need to do a search that the quick searches won't work for. Fill in the fields to narrow the search and click **Lookup** at the top or bottom of the page to perform the search. If you need to start over, simply click **Clear Filter** to remove all search field entries.



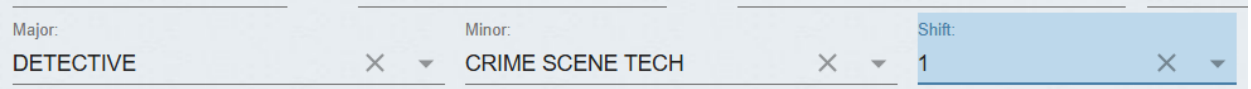
Field Explanations



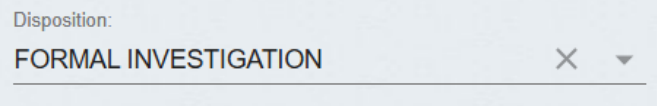
These fields let you find records that happened or have a specific disposition during a specified time period.



These fields let you search for specific cases and reports involving specific people. **Case Number** is to search for a specific case if you know the case number for the report. **Report By** lists the officer who initially filled out the report, while **Other Employee** finds reports involving a chosen employee (even if they did not fill out the report.) **Narrative Keyword** looks for the chosen word in the narrative section of the record.



You can search by a person's division or shift.



Disposition will filter the search by whatever disposition is chosen.



Pursuit Type searches for pursuits by foot, vehicle, or both. **Force Involved** searches by weapon or force used.

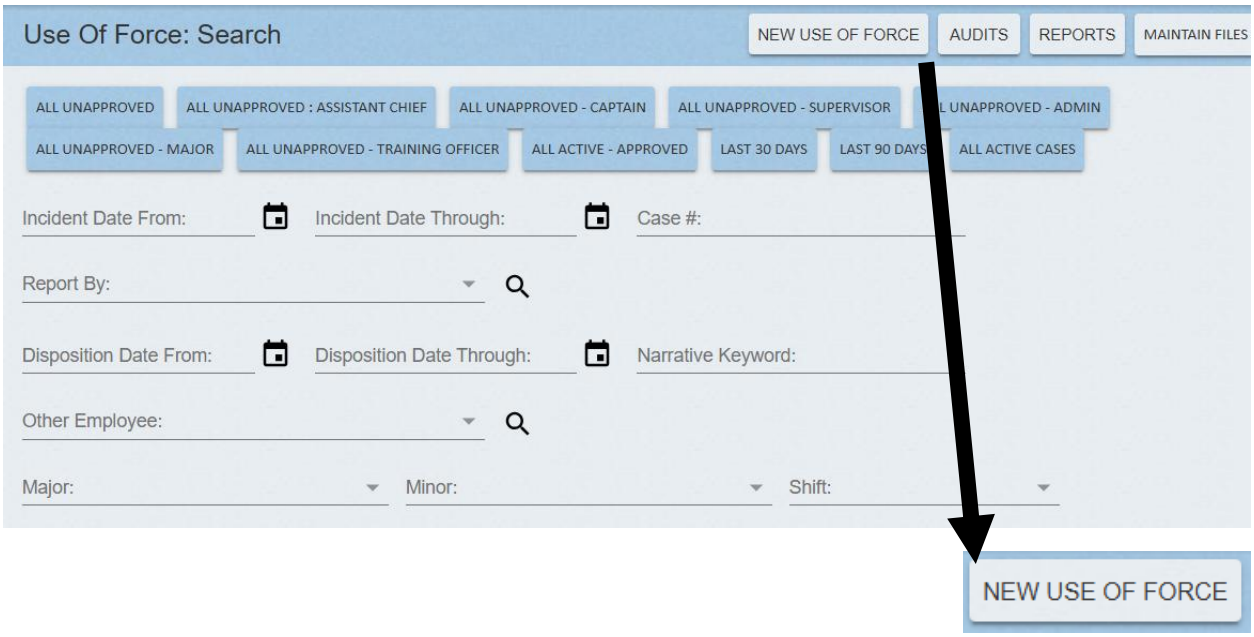
As mentioned above, when you have finished with your search parameters, click **Lookup** to perform your search. Double click on the desired entry to view, edit, or approve the use of force report.



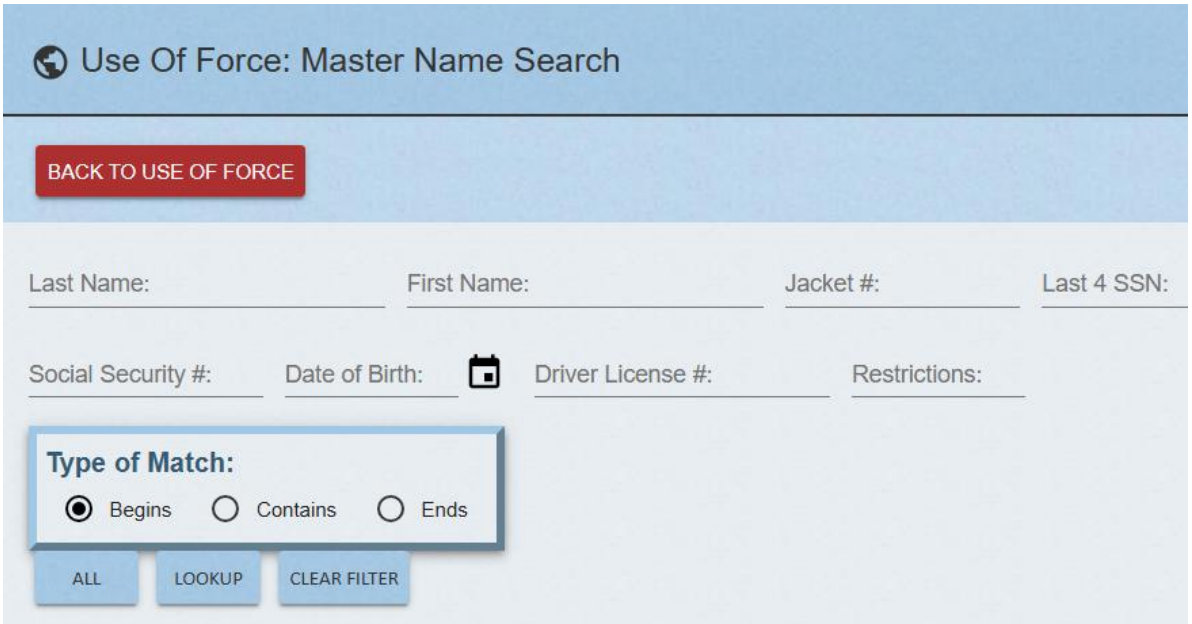
	Case #	Reference #	Report Date	Reported By	Last Name	First Name	Middle Name	Race	Sex
✎	06008712	CASE 1234	09/11/2021	ELDER, MARTIN W	SMITH	CHARLES		BLACK OR AFRICAN AMERICAN	MALE
✎	06008712	CASE 1234	09/11/2021	ELDER, MARTIN W	SMITH	CHARLES		BLACK OR AFRICAN AMERICAN	MALE

Creating a Use of Force Record

To create a new use of force record, click **New Use of Force** in the upper right corner of the Use of Force search screen:

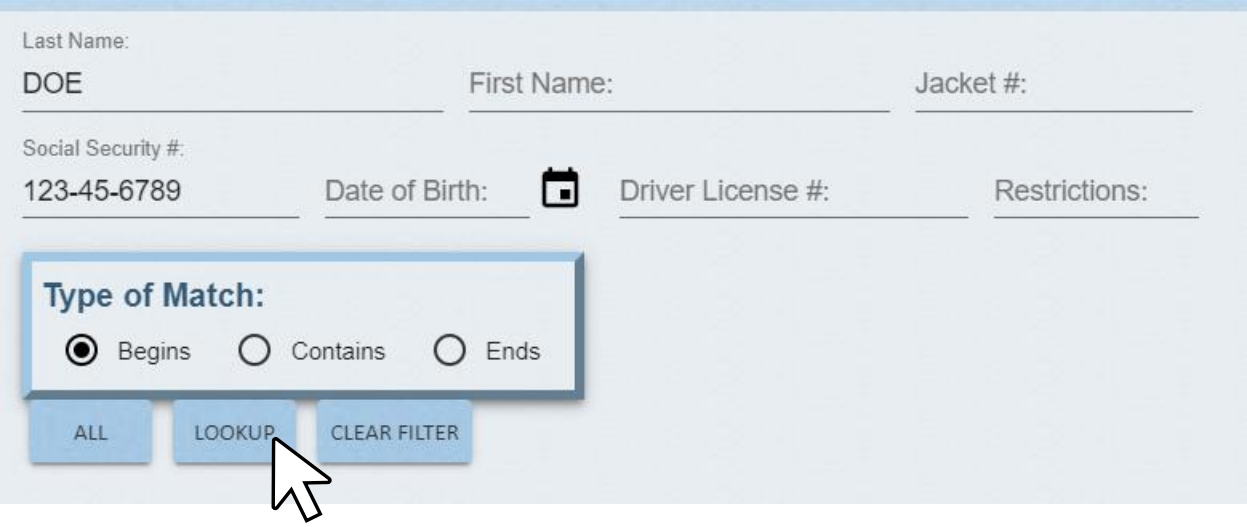


You will make an Use of Force record using the Master Name entry of the inmate involved. If you need to add multiple inmates, you will be able to add more once the Use of Force record is created.



Search for the person for which you are creating a Use of Force record, using *at least* two identifying pieces of information. You want to verify that the inmate matches with the Master Name.

Click **LOOKUP** when you have the information you need.



Double-click the appropriate Master Name from the results to open their record.

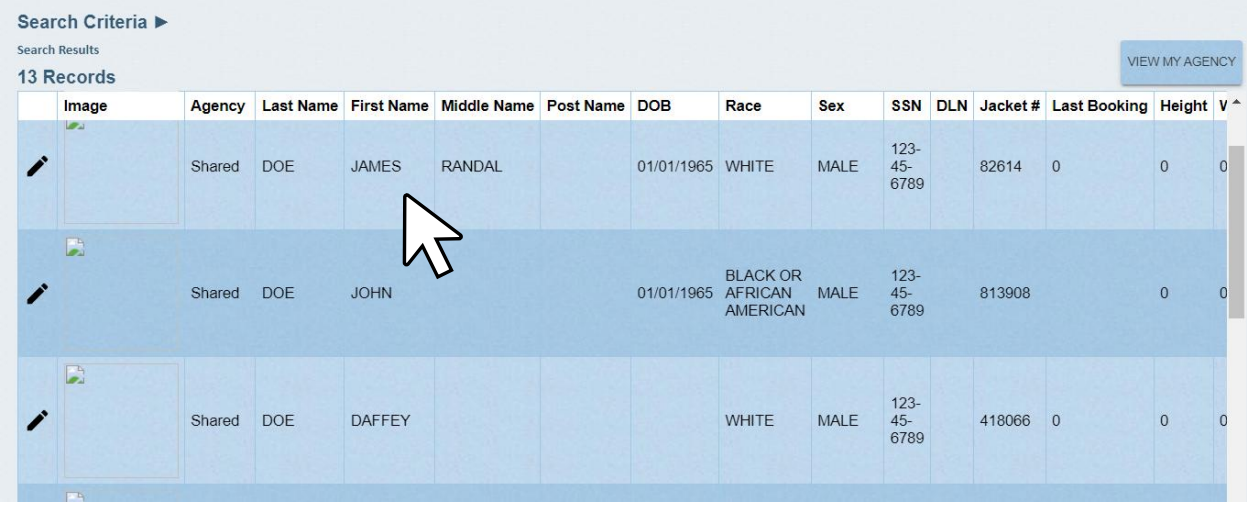
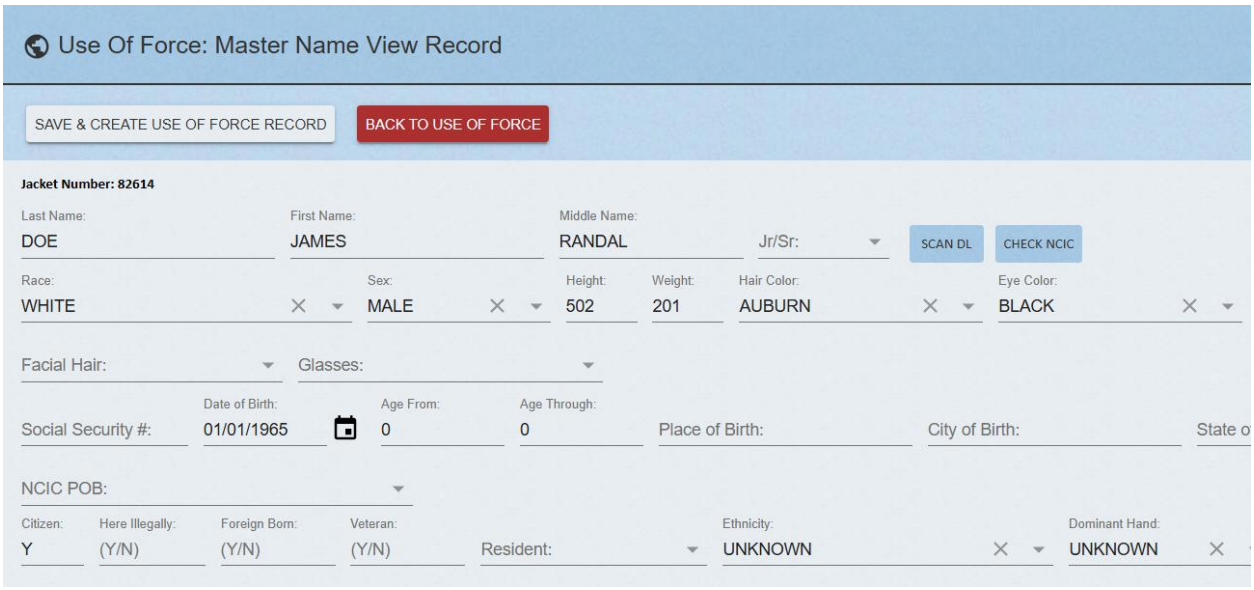
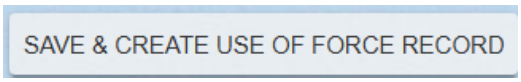


	Image	Agency	Last Name	First Name	Middle Name	Post Name	DOB	Race	Sex	SSN	DLN	Jacket #	Last Booking	Height	V
		Shared	DOE	JAMES	RANDAL		01/01/1965	WHITE	MALE	123-45-6789		82614	0	0	0
		Shared	DOE	JOHN			01/01/1965	BLACK OR AFRICAN AMERICAN	MALE	123-45-6789		813908		0	0
		Shared	DOE	DAFFEY				WHITE	MALE	123-45-6789		418066	0	0	0

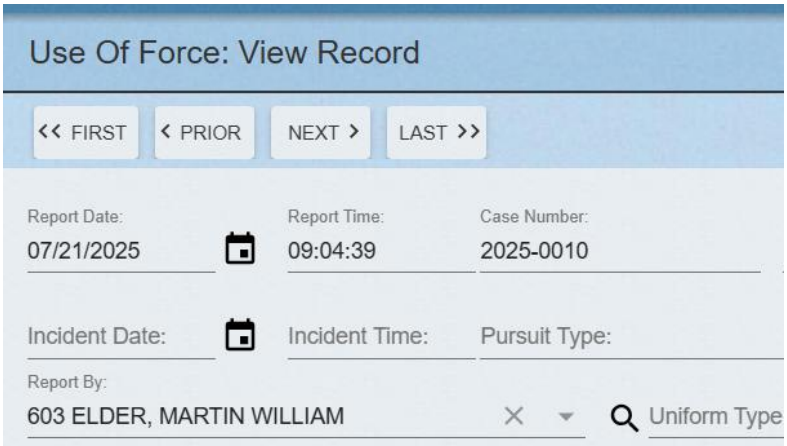
Verify the Master Name information is filled out correctly. If you don't have the person in the Master Names, you should create a new one. (See *Creating A New Master Name* on page 52.)



Click **Save & Create Use of Force Record** when you are finished.



This will create and open the new record.



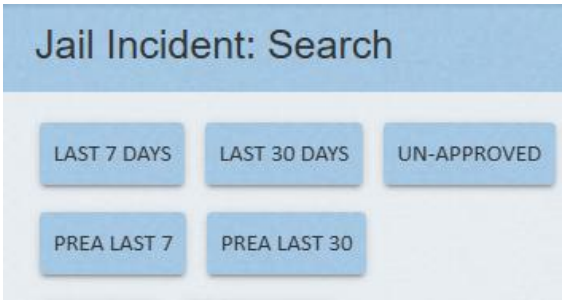
Transferring a Record from Jail Incidents to Use of Force

iSOMS has a new feature that allows you to copy information to a new Use of Force record with information you have already put in Jail Incidents. This is available underneath the **Inmates** tab.

Navigate to **CORRECTIONS → INMATE TRACKING → JAIL INCIDENT REPORTS**

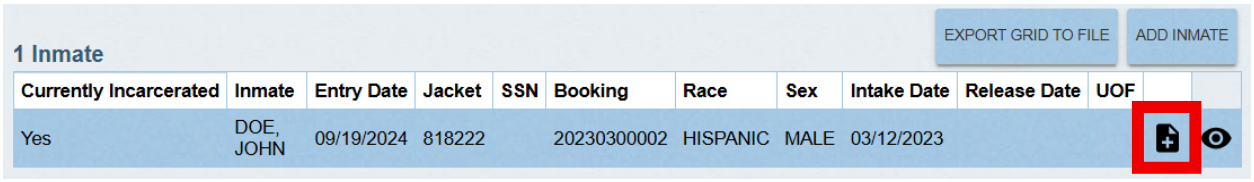


Find the incident report you want to view or edit.

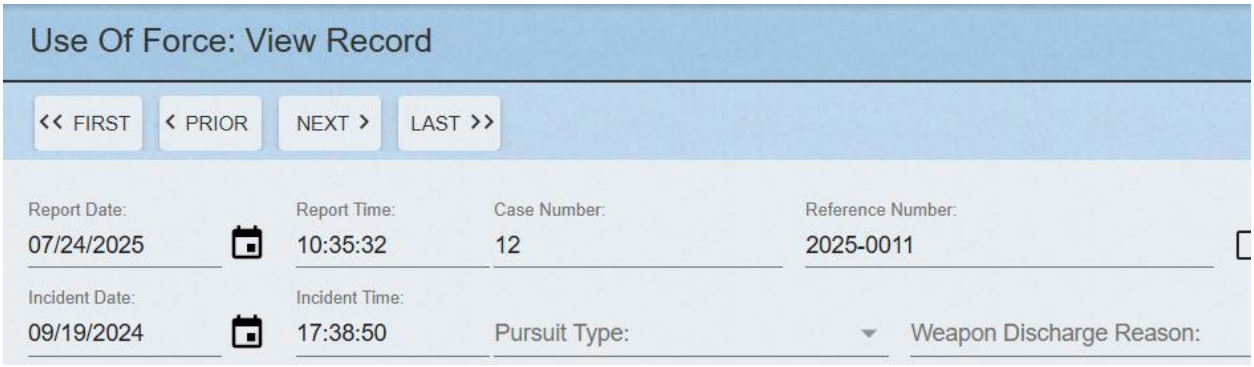


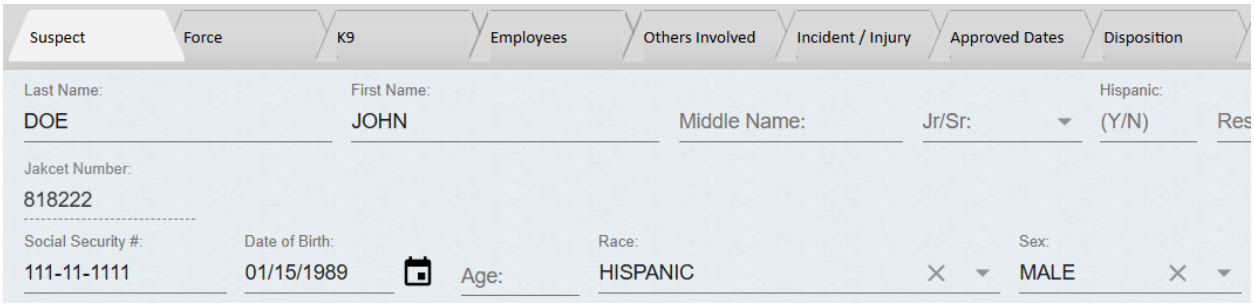
Then navigate to the **Inmates** tab. You will see the Add Page icon ( ), which will copy information from this record into a new **Use of Force** record.



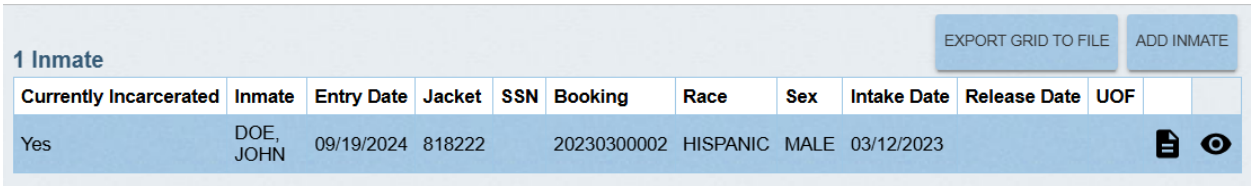








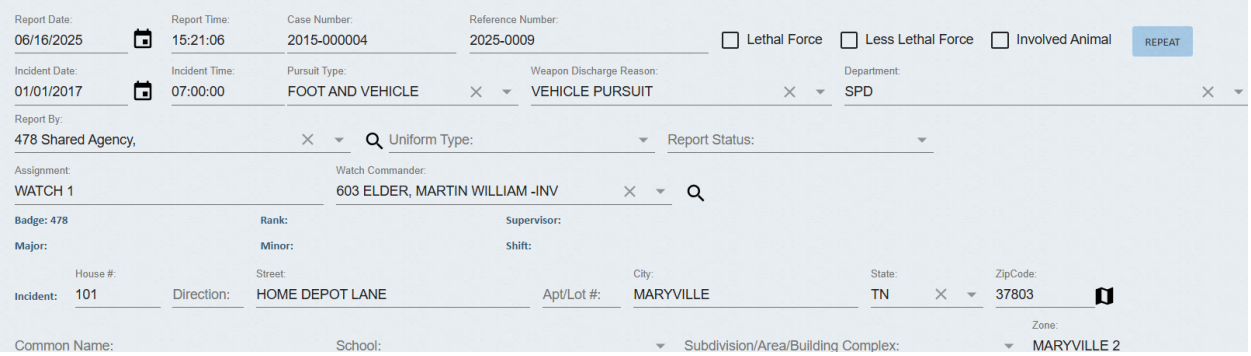
Now when you view the **Inmates** tab in *Jail Incidents*, you will see the View Page icon ( ), which will show you the new Use of Force record that was created and linked to this inmate's record in Jail Incidents.



Filling Out a Use of Force Record

There are two primary sections of the record:

1. The *fields* in the upper part of the screen. These are for details about the report, the assigned officer, incident location, etc.



2. The *tabs* record information about the suspect, applied force, charges, report approval, incident, and more.



Fill out the fields concerning the item and then the tabs as appropriate. This process is covered in detail in the next section, *Filling Out a Use of Force Record.*

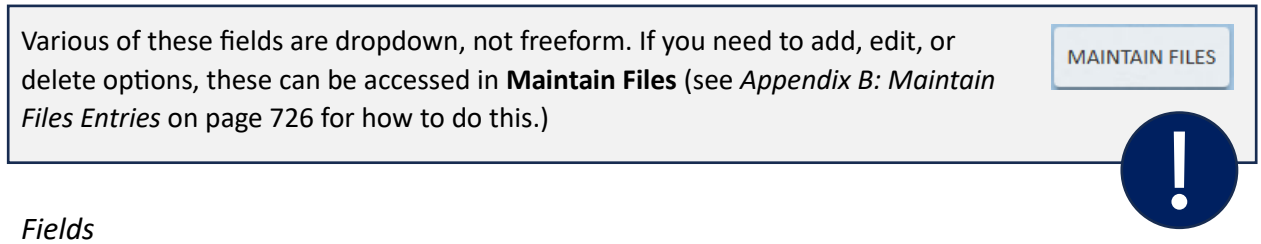
After you enter new details, make sure to click **Save** at the top of the screen.



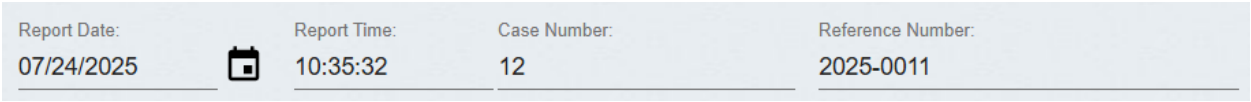
Filling Out a Use of Force Record – Fields

This section explains in detail the different fields for a use of force entry. The fields cover information such as incident address, pursuit type, classification, report status, lethal/less lethal/animal involved force, and more.

Various of these fields are dropdown, not freeform. If you need to add, edit, or delete options, these can be accessed in **Maintain Files** (see *Appendix B: Maintain Files Entries* on page 726 for how to do this.)



Fields



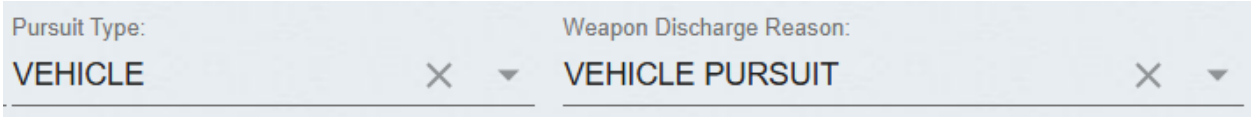
Report Date and **Time** are for the date/time of the record. **Case Number** is used as a method of reference for use of force records. These fields automatically filled in but you can change them if so desired. Reference Number can be edited manually or will auto-populate from transferred jail incidents.



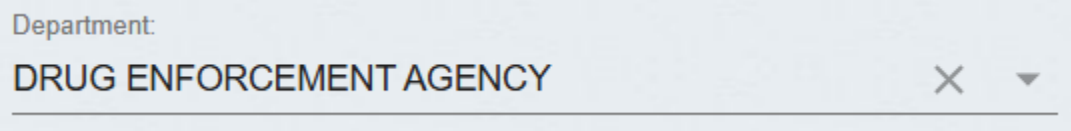
For these checkboxes, mark the appropriate box depending on amount or reason for use of force used. These are simply for search and classification; this is not the only place to describe this.



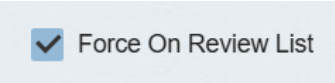
Add the **Incident Date** and **Time** since this often different than the time the report is created.



Add the **Pursuit Type** if a pursuit occurred during this incident. Add **Weapon Discharge Reason**, such as *Vehicle Pursuit, Mercy Dog, Mercy Deer,* etc.



Department shows the department involved in the use of force.



This checkbox currently is *non-functional*.

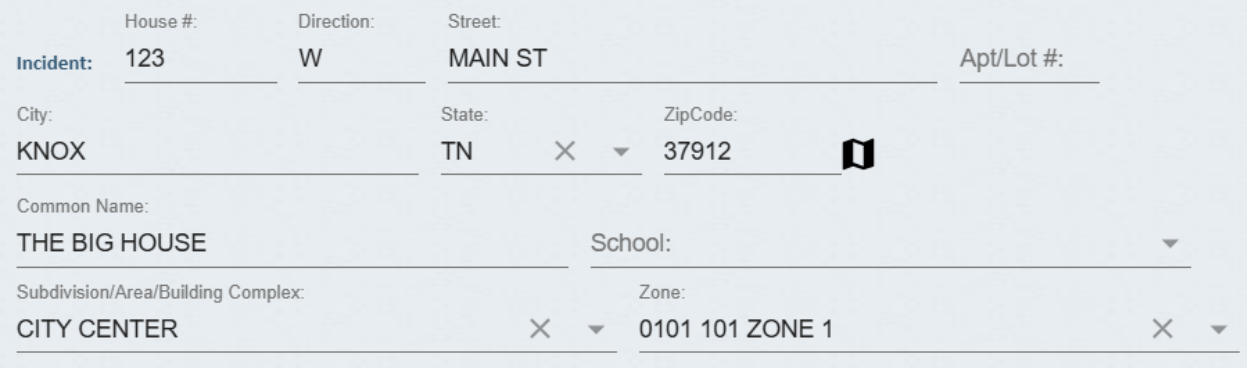


Report By is typically auto-filled with your name, but if this report was filled out by someone else, you can change that here.

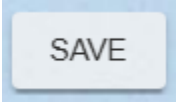


You can add a brief description of the assignment in the **Assignment** field. Also note the **Watch Commander** here as well.

The next set of fields lists information about the address of the incident. Fill them out as needed.



Make sure to **Save** at the top of the record as you go so you do not lose entered details.



Filling Out a Use of Force Record – Tabs

Summary

Fill out the tabs below the fields as needed.

The **Suspect** tab contains information on the identity of the person, such as description, IDs, address, and more.

Force is for recording details on the force used, if it was effective, etc. **K9** is for recording use of K9 as related to the Use of Force record.

Employees is for listing the employees of your agency / department involved with this use of force. **Others Involved** can be used to add other people besides employees involved with the suspect or incident of this record.

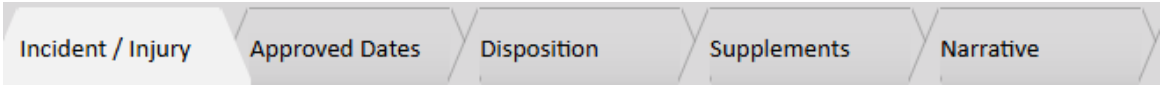


Incident / Injury is mostly for recording information on injury to the officer or suspect and treatment of said injury.

Approved Dates lets supervisors approve the Use of Force record.

Disposition holds information related to the settling of this Use of Force record and if further action is needed.

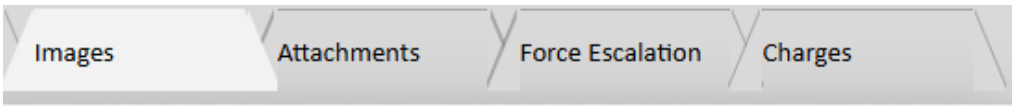
Supplements allow you add supplements to this report, including the report status and purpose for the supplement. **Narrative** gives you an area where you can add a long note to describe the incident and add additional details.



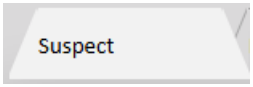
Images, and Attachments tabs are available if you need to upload images and documents. (Images and Attachments in this module function similar to those in all of iSOMS, so if you are familiar with them, you do not need to read those sections.)

Force Escalation records info on any force escalation by officer or suspect, and the officer's response at each level.

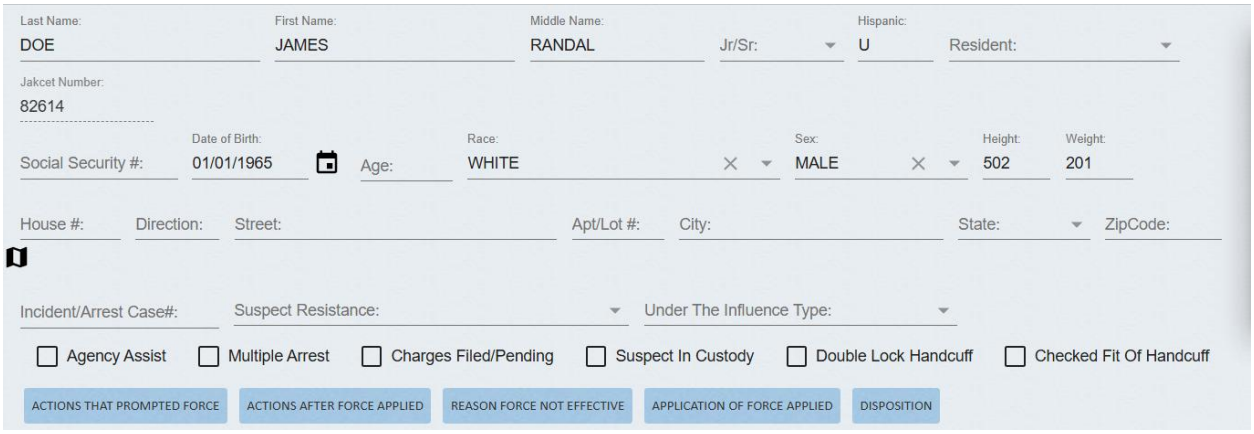
Charges is a grid for charges the suspect is facing.



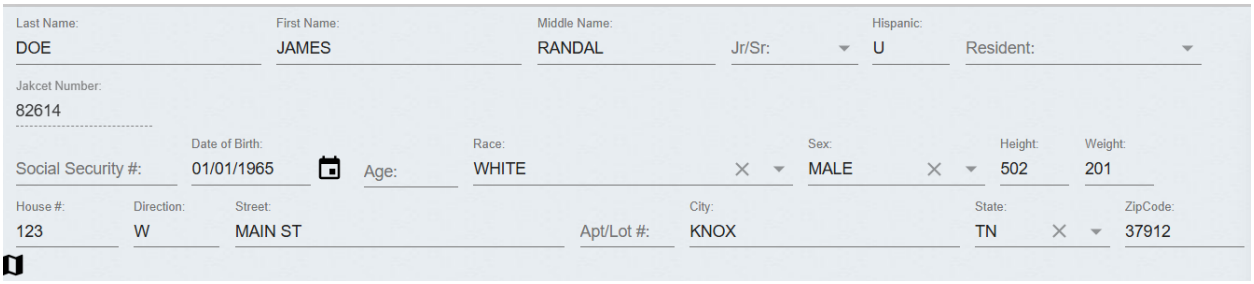
Suspect Tab



The **Suspect** tab records information such as name, SSN, DOB, identifying info, ID #'s, and other suspect information. If using an existing Master Name, some of this information will load in from the Master Name file.



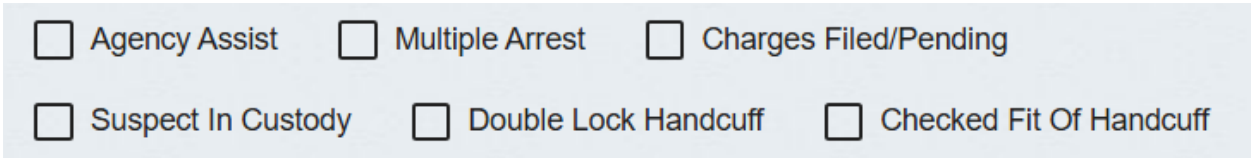
First, add any additional info not filled in by the Master Name:



Now add information on the **Incident / Arrest Case #,** how the suspect resisted in **Suspect Resistance,** or if they were under the influence in **Under the Influence Type**.

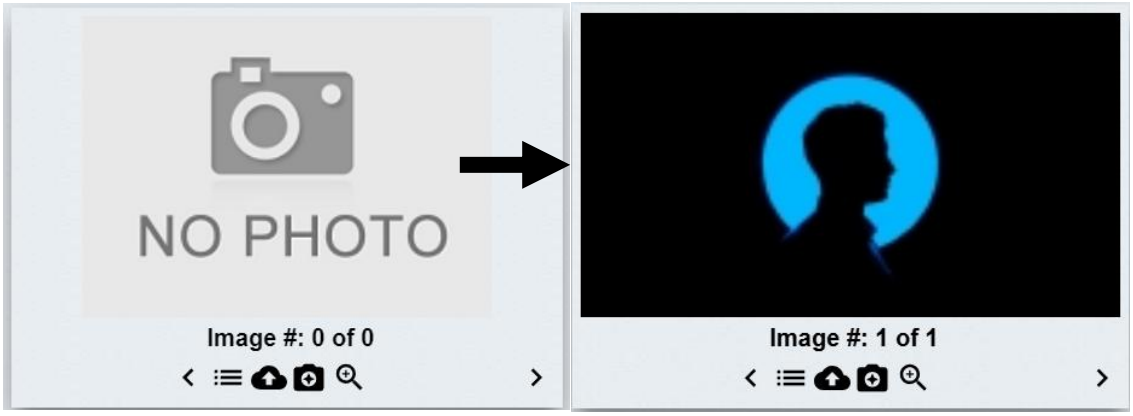


The next set of checkboxes lists different things about the suspect's incident / arrest. Mark them as appropriate:



The final set of buttons are note buttons that allow you to record information on the force applied to the suspect and the disposition. Use them to add custom notes if you'd like here, or record them under other tabs such as **Supplements** or **Narrative**.





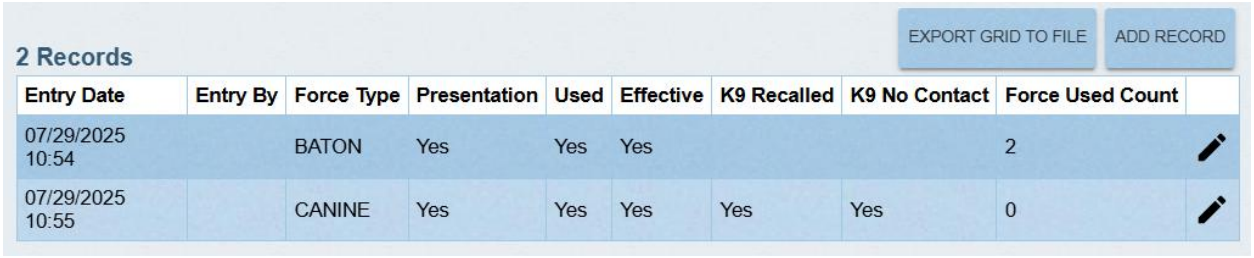
Make sure to **Save** at the top of the record as you go so you do not lose entered details.



Force Tab



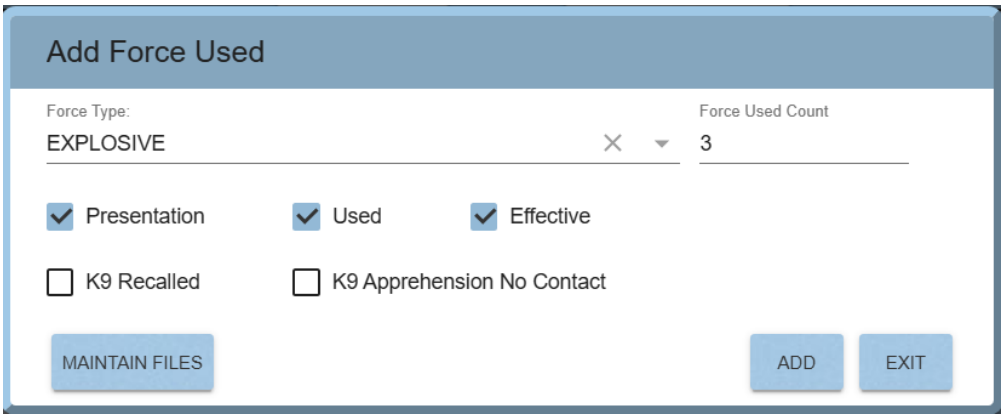
The **Force** tab is for recording the applications of force in short entries or notes. To view, edit, or delete a force record, simply double click it on the table.



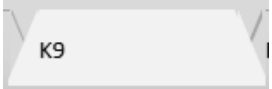
To add a new entry, click **Add Record** and then fill out the details of the record:



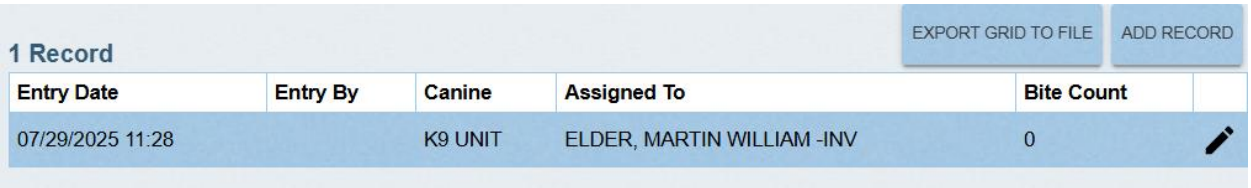
Add the **Force Type**, mark the appropriate checkboxes, and if it makes sense for this type of force, list the **Force Used Count:**



K9 Tab

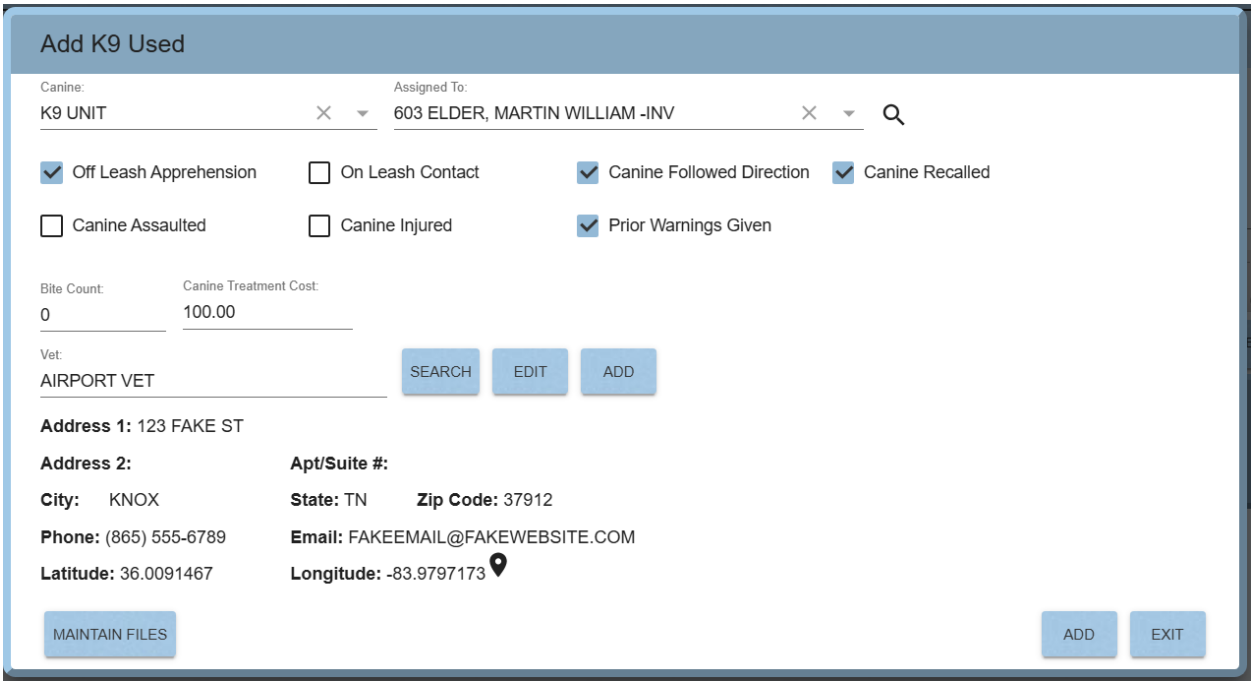


The **K9** tab is for recording the use of K9 in a use of force record. To view, edit, or delete a K9 record, simply double click it on the table.

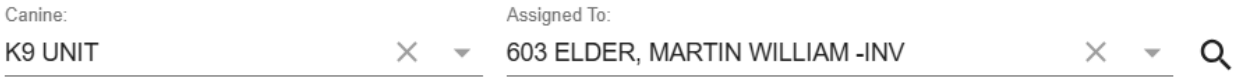


To add a new entry, click **Add Record** and then fill out the details of the record:





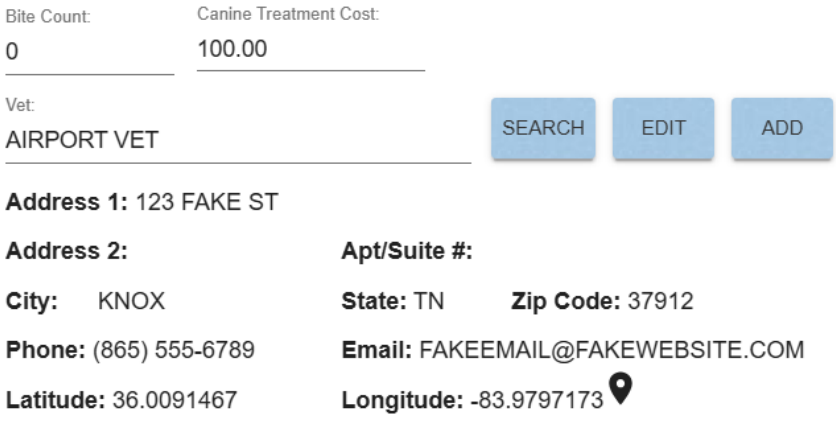
First, add the K9 used in **Canine** and who the K9 is **Assigned To**:



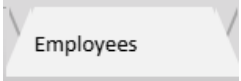
Now mark checkboxes on what happened with the K9 during the use of force incident:



If the dog applied bites, list how many in **Bite Count.** Add any **Treatment Cost** and the **Vet.** For additional details on adding business records, such as this vet, see *Appendix C: Business / Organization Records* on page 728.



Employees Tab



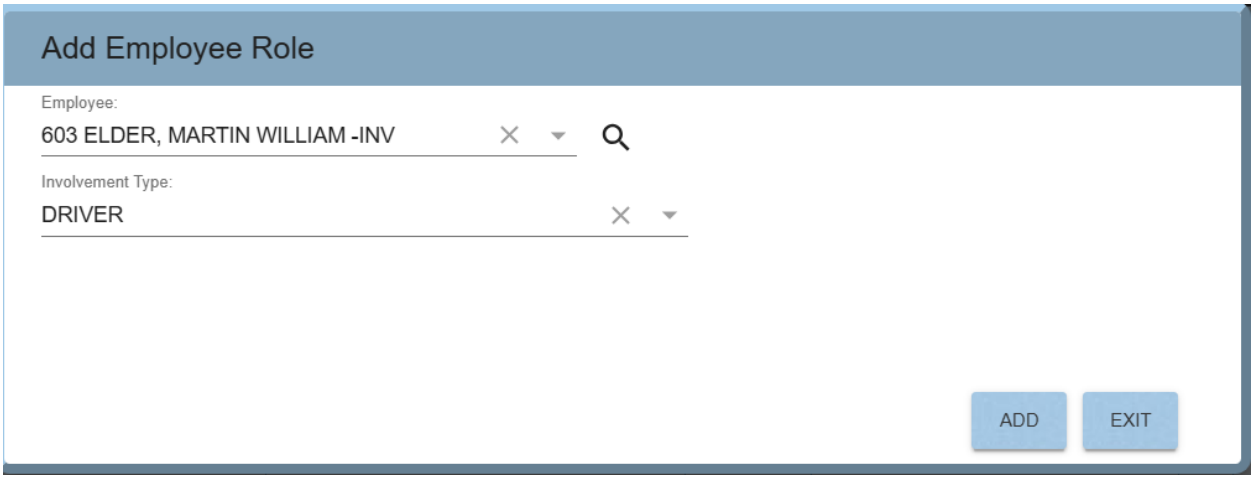
The **Employees** tab lists the employees and officers involved with the incident. To view, edit, or delete a current entry, double-click an entry from the table.



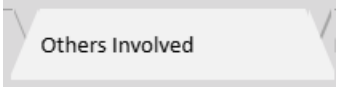
In order to add a new entry, click the **Add Employee** button.



Fill in the employee and their involvement, and hit **Add** to add them to the list.

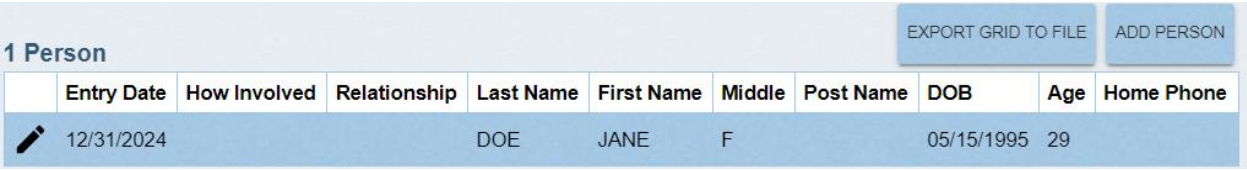


Others Involved Tab



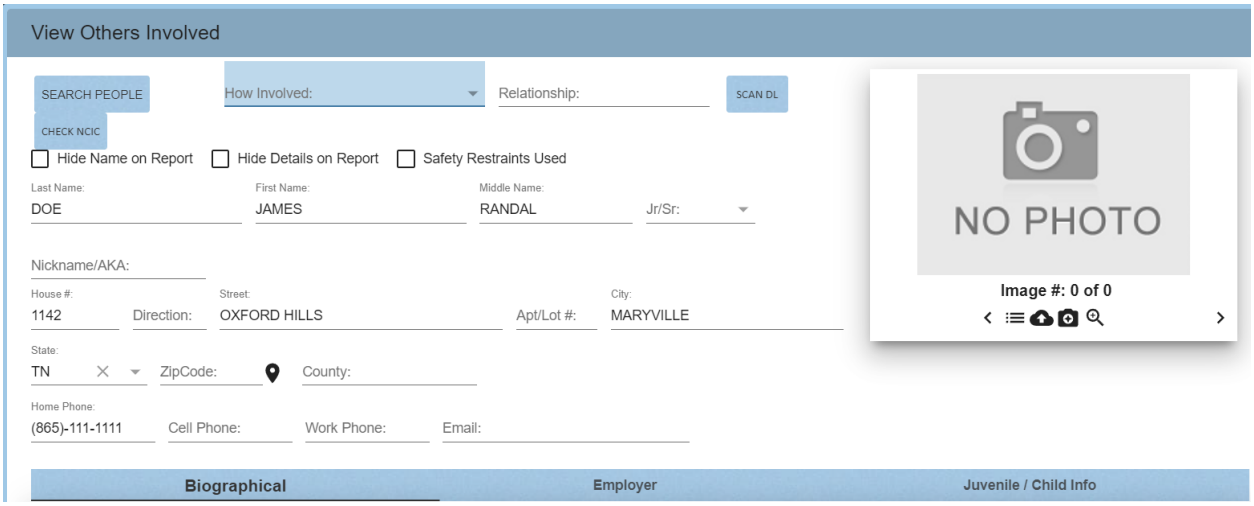
The **Others Involved** tab lets you record any other individuals (besides suspects and employees) that are involved in the situation and details relevant to those people. To view, edit, or delete a current entry, double-click an entry from the table.

When you add a new entry, you should fill out only the tabs you need to fill out to track information and then save it. Details are provided for each of the sub-tabs below, although each sub-tab is relatively intuitive. Add information as needed.



In order to add a new entry, click the **Add Person** button. Confirm you want to add a new person involved, and then you will see the options to fill in the fields.

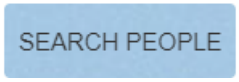




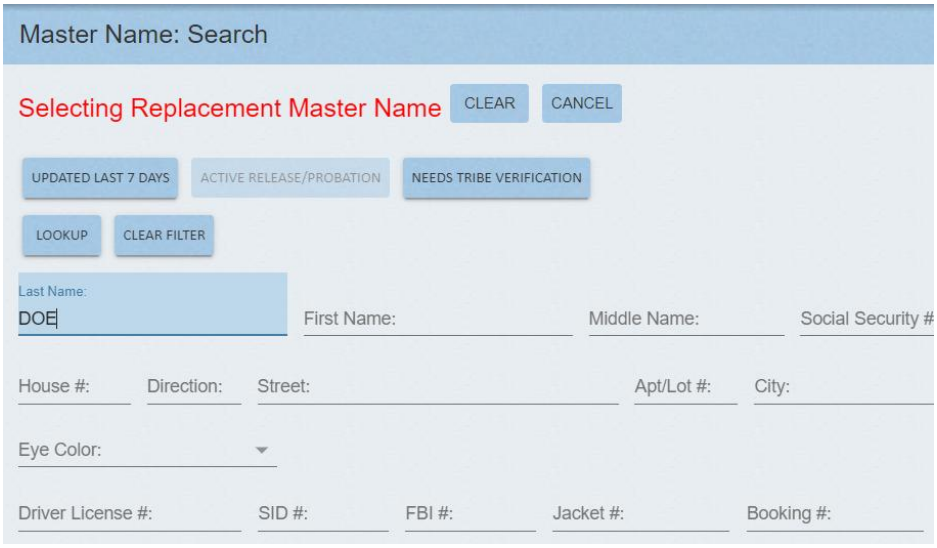
The fields at the top list the person's involvement and relationship to the people involved. Then identifying fields are below, along with additional headers to add extra info such as *Biographical, Employer,* and *Juvenile / Child Info*. For details, see below.

Quick Fill from Master Names

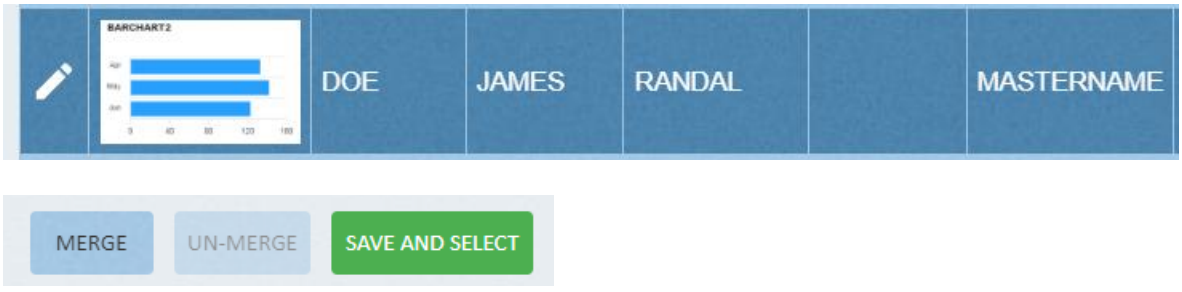
If you already have information on someone as a Master Name, then you can add it quickly by clicking the **Search People** button in the upper left.



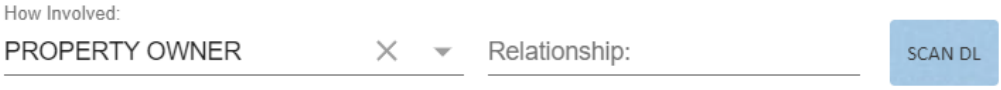
This will open the Master Name search screen. Input a name and other identifying info (such as DL number or SSN, etc.), then click **Lookup.**



Select the person from the list to add them, and then click **Save and Select** in the *Others Involved* tab. This will autofill information you have on them.



Filling in Information



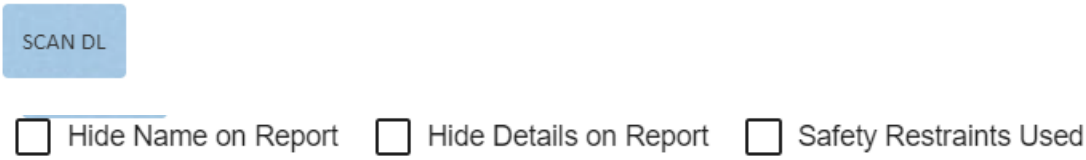
First, fill in **How Involved** dropdown with how the person is connected to the incident.



Add the **Relationship** this person has to the other people involved.



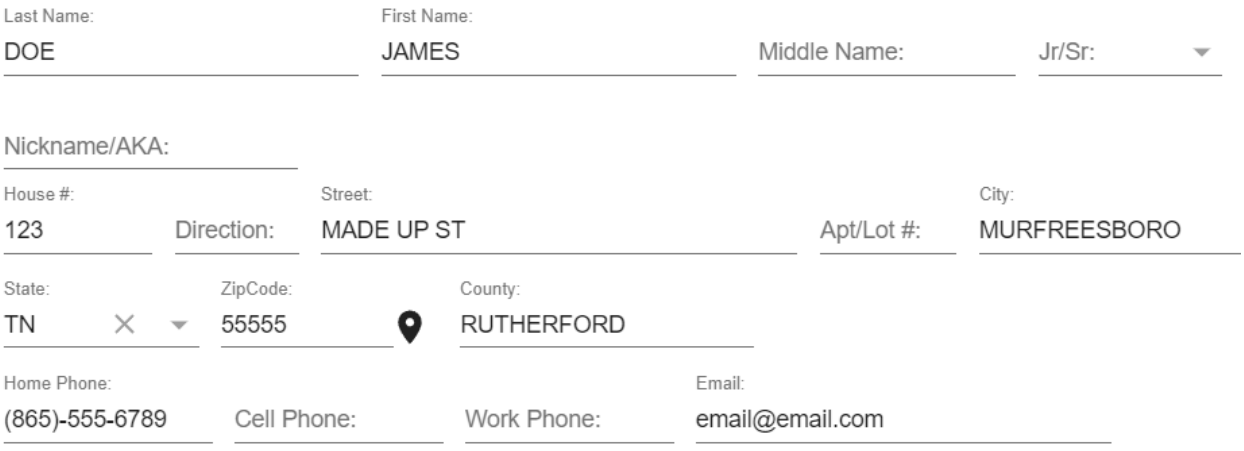
Now you can scan the person's driver license if you click **Scan DL**.



If you need to hide this name or details about the report, check **Hide Name** or **Hide Details**.

If the person had to be restrained, check **Safety Restraints Used.**

Now fill out the information about the person if necessary:



Headings

Below the main fields, the headings are available to type additional information about the person.

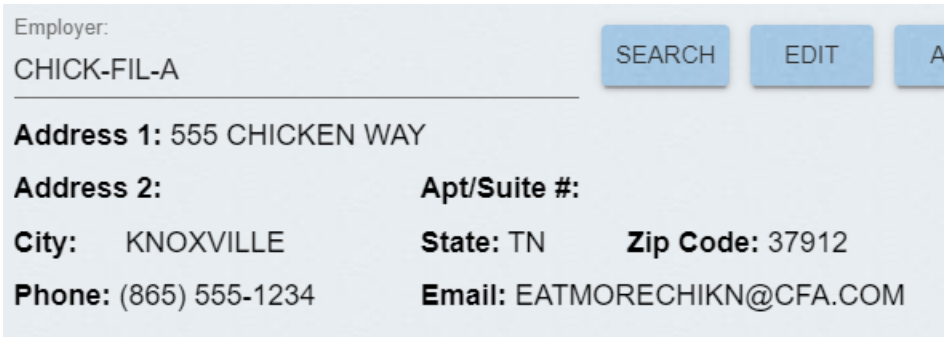


Fill in the biographical information under this heading, including SS and DL numbers.



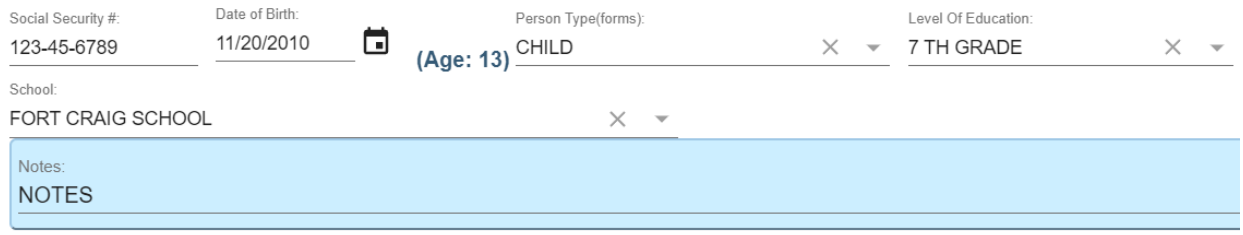


Here you can add an employer record. The Employer system works by storing records of employers. This makes it so that you do not have to continuously re-enter the same information on the same business. See *Appendix C: Business / Organization Records* on page 728 for more information.



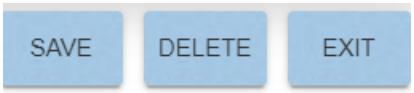
Juvenile / Child Info

Here you can fill out information on the individual if they were a juvenile / child.



Add the **Level of Education** and **School** along with any necessary **Notes**.

This completes filling out the *Others Involved* entry. Click **Save** in the bottom right to finish this entry. If you have any more to add, simply repeat the process.



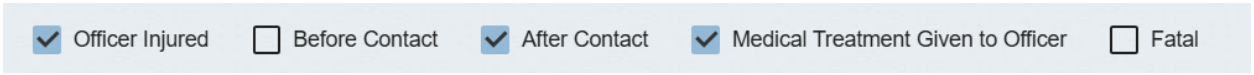
Incident / Injury Tab



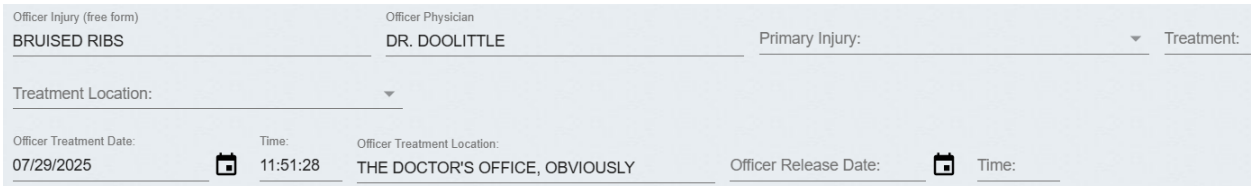
The **Incident / Injury** tab records information on injuries to the officer and suspect. Fill out this as information becomes available and make sure to document treatment / release info.



First fill out the details about the officer injury.



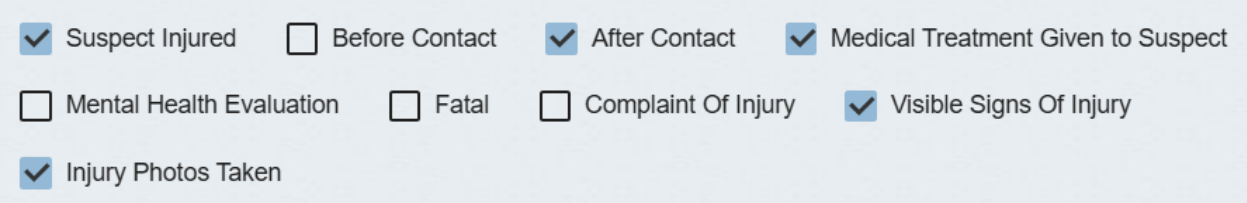
These checkboxes relate to the officer's injury. They can later be searched and reported on, so make sure to mark the appropriate boxes.



Now add details on the treatment, including the date, physician, and location.

Continued on the next page

Next, fill out details about any injury and treatment of the suspect:

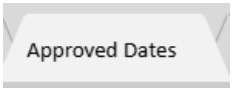


These checkboxes relate to the suspect's injury. They can later be searched and reported on, so make sure to mark the appropriate boxes.



Now add details on the treatment, including the date, physician, and location.

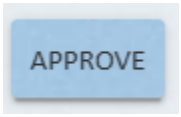
Approved Dates Tab



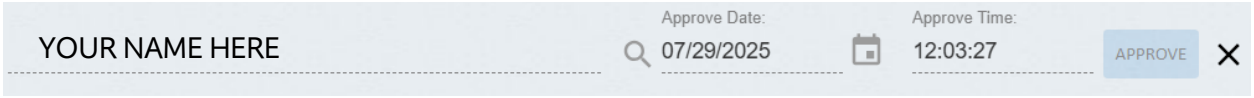
On the **Approved Dates** tab, supervisors can approve the report or add why they did not approve the report as a note.



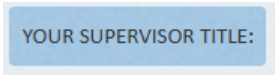
To approve the report, simply click **Approve** next to your title, whether major, sheriff, chief, etc.

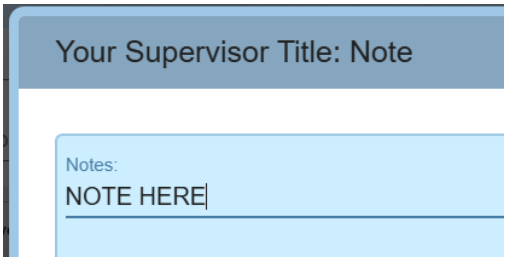


This will ask for your iSOMS password. Once entered, your name and the datetime will be added.



You can add a note on why you approved or did not approve by clicking the button to the right of **Approve:**





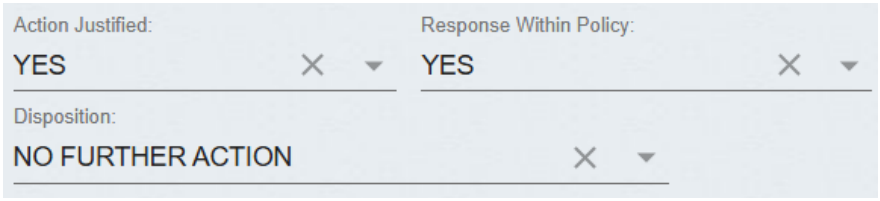
Disposition Tab



The **Disposition** tab has fields related to the disposition of the Use of Force record.



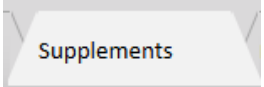
Add the **Disposition Date** and **Time** and who disposed it in **Disposed By** once this report has been disposed / resolved.



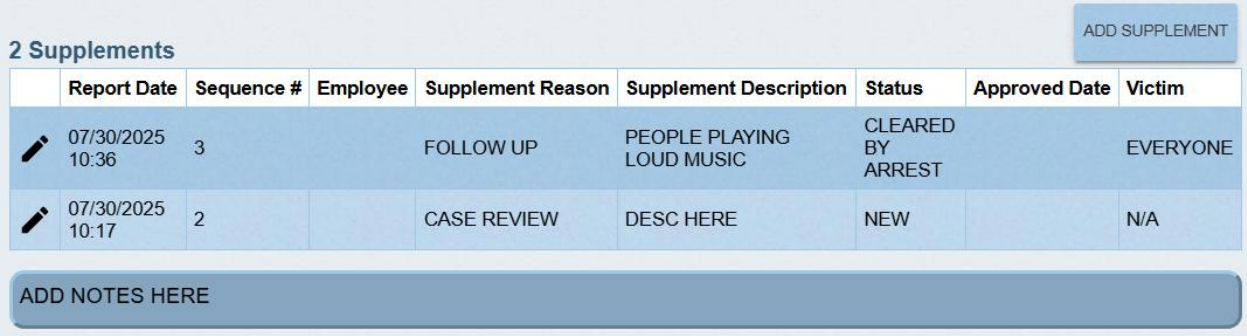
These fields relate to conclusions about the use of force. Put the conclusion on the action in **Action Justified** and whether the response followed policy in **Response Within Policy**.

Finally, add the **Disposition,** such as *No Further Action, Other Action,* or *Further Investigation.*

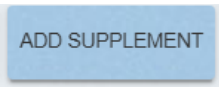
Supplements Tab

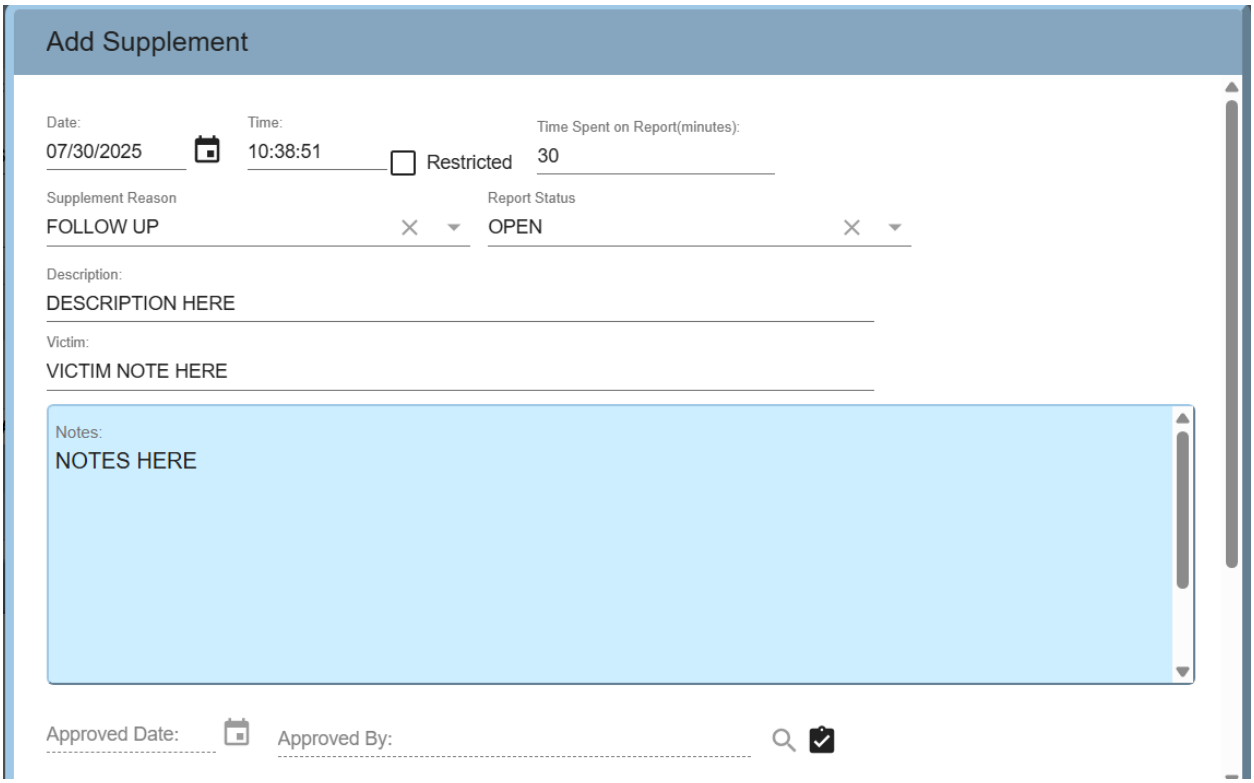


The **Supplements** tab is where you can add supplements specifically related to the Use of Force. To view, edit, or delete a current entry, double-click an entry from the table.



To add a new supplement, simply click **Add Supplement** in the upper right.





The **Date** and **Time** will automatically be set to the current date and time.



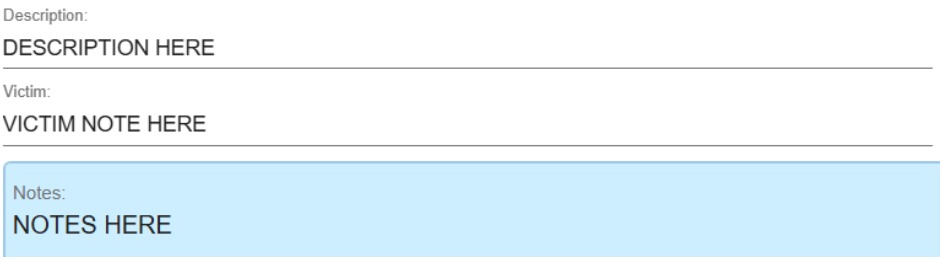
If this supplement should be restricted, check **Restricted.**



Add the **Supplement Reason,** such as *Case Review, Extra Patrol Report, Follow Up,* or *Investigation Report.* Then add the **Report Status,** like *New, Open, Ready for Review, Admin Closed,* etc.



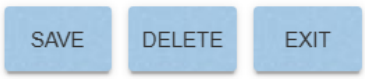
Add the **Description** for the supplement, a note on who is a victim in **Victim**, and any additional **Notes** for the supplement here.



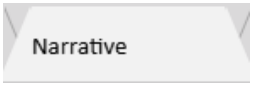
Once a supplement is ready to be approved by a Supervisor, they can click on the approve report button near the bottom.



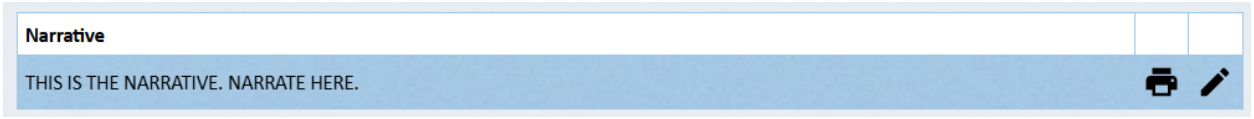
When finished, click **Save**. If you need multiple supplements, simply repeat the above process.

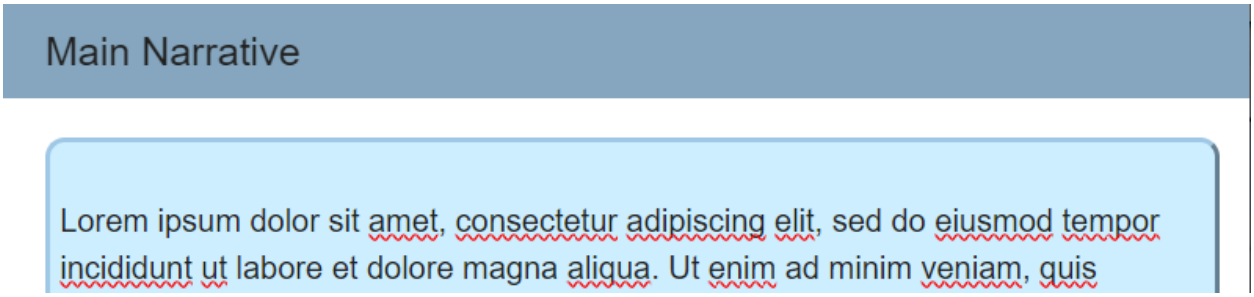


Narrative Tab



The **Narrative** tab gives you an area where you can add a long note to describe the incident and add additional details.





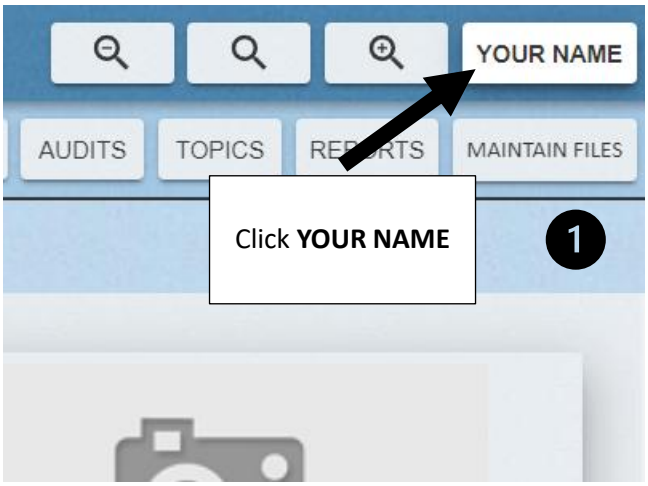
Images Tab

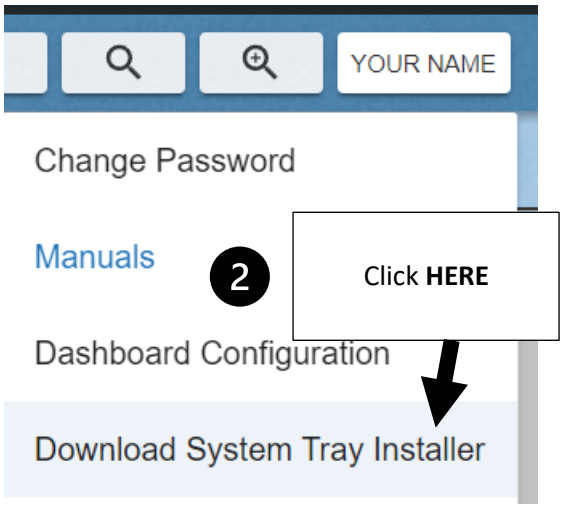


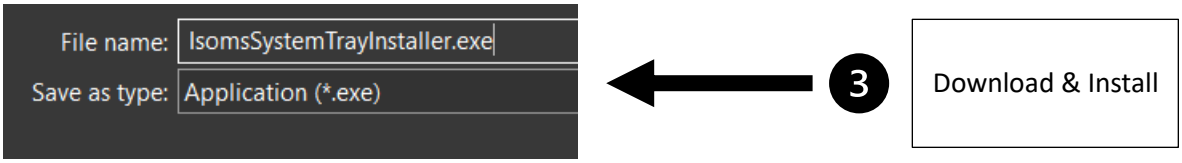
The **Images** tab is used to view, download, or add images. You can add a single image at a time or multiple images at a time. Click **Add Image** to add a single image.



To add multiple images at a time, you will need the System Tray Installer downloaded to the computer you are using. The System Tray Installer can be found on the iSOMS home page by clicking on the button in the upper right with your username. Once you click on that, you will get a drop-down list, and **Download System Tray Installer** is one of the options. Download and install it on this computer.

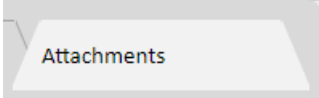




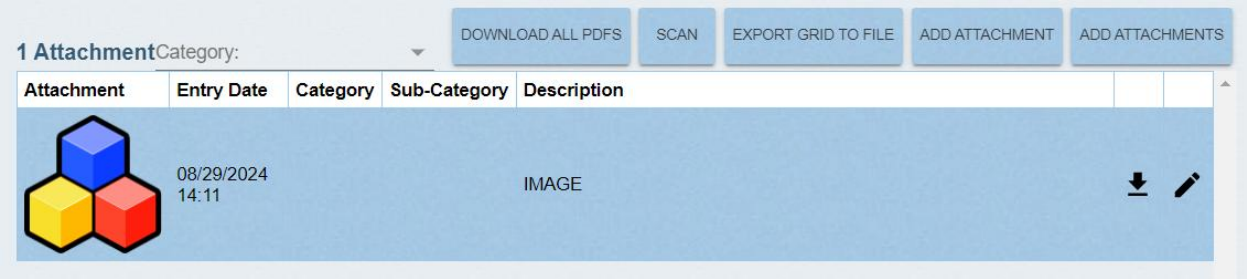


After you have the System Tray Installer on the computer, you can now use the **Add Images** button to upload multiple images at once if necessary.

Attachments Tab



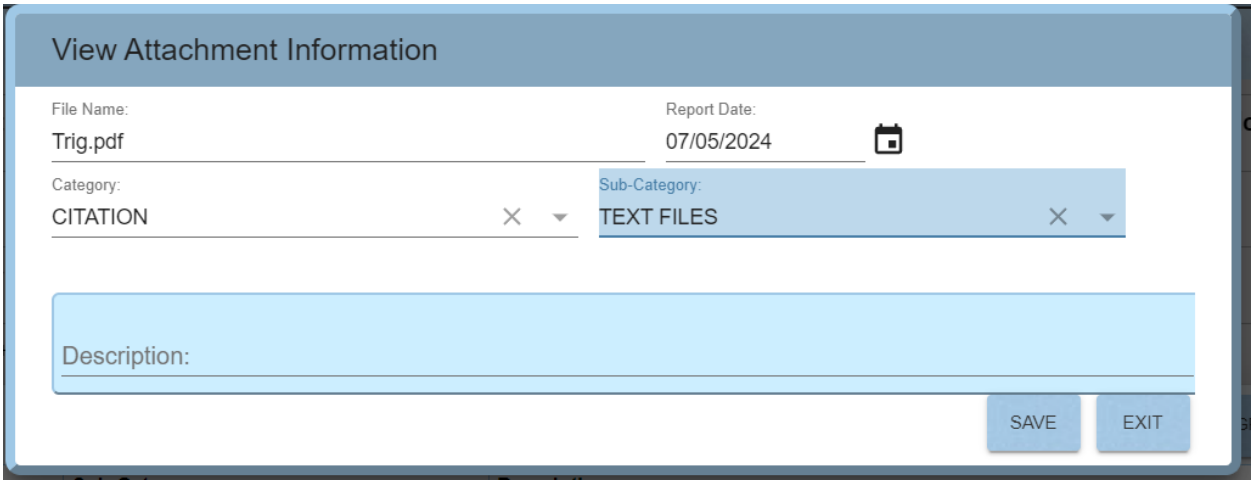
The **Attachments** tab is used to view, download, or add attachments. Double-click a file entry to view the record for the attachment or click on the icon to download the attachment to the computer.



You can add a single attachment at a time or multiple attachments at a time. Just like above with images, you will need the System Tray Installer downloaded to the computer you are using to add multiple attachments at once. See the *Image* tab instructions on the previous few pages for instructions on installing the System Tray Installer.

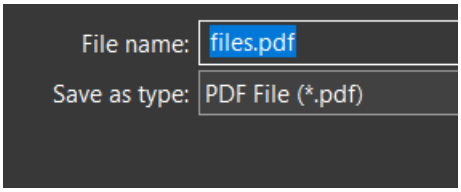
Click **Add Attachment** to add a single attachment or click **Add Attachments** to add multiple attachments at the same time. Choose the attachments from the computer, then add the appropriate category and sub-category for the file.



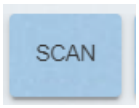


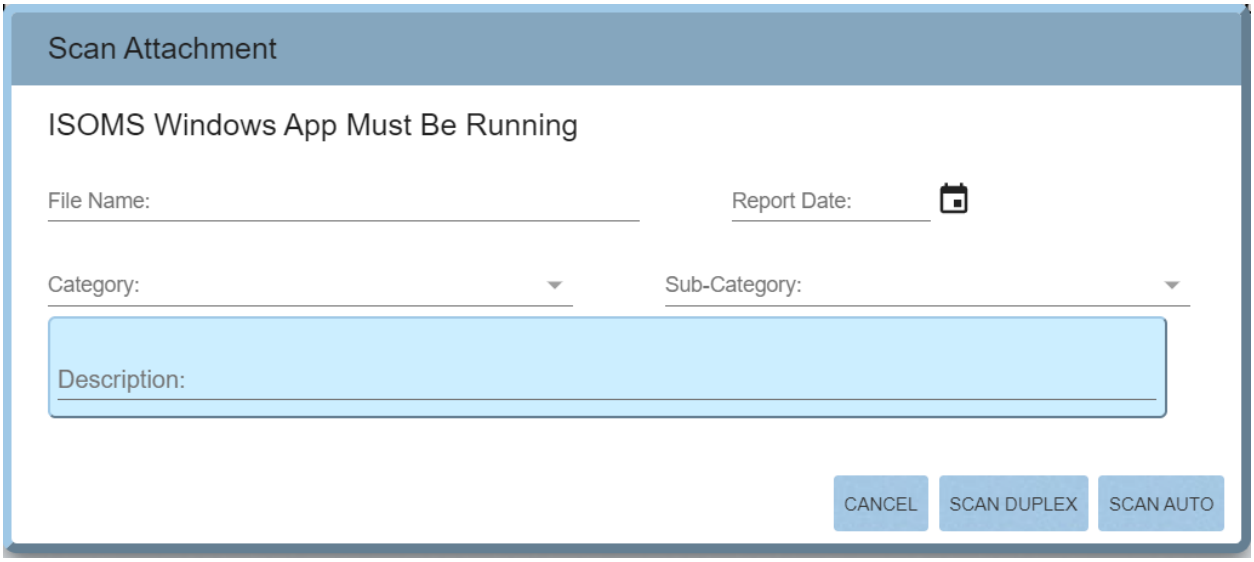
You can also **Download All PDFs** at once by clicking the appropriate button.





If you have the iSOMS Windows App, you can use **Scan** to scan files into the attachments.

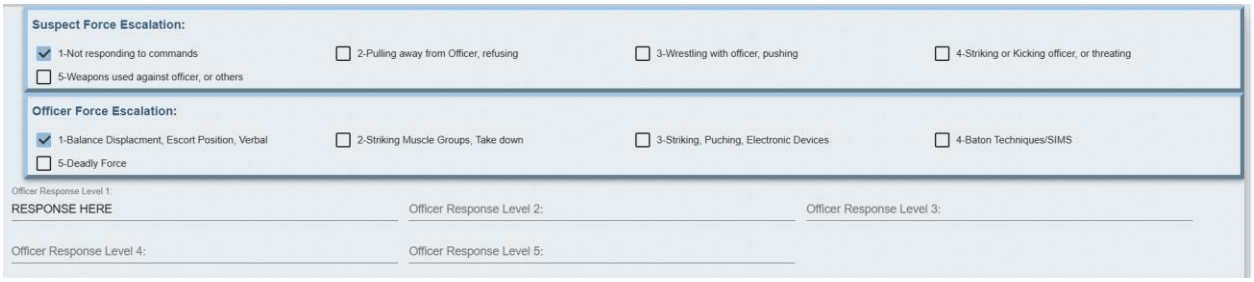




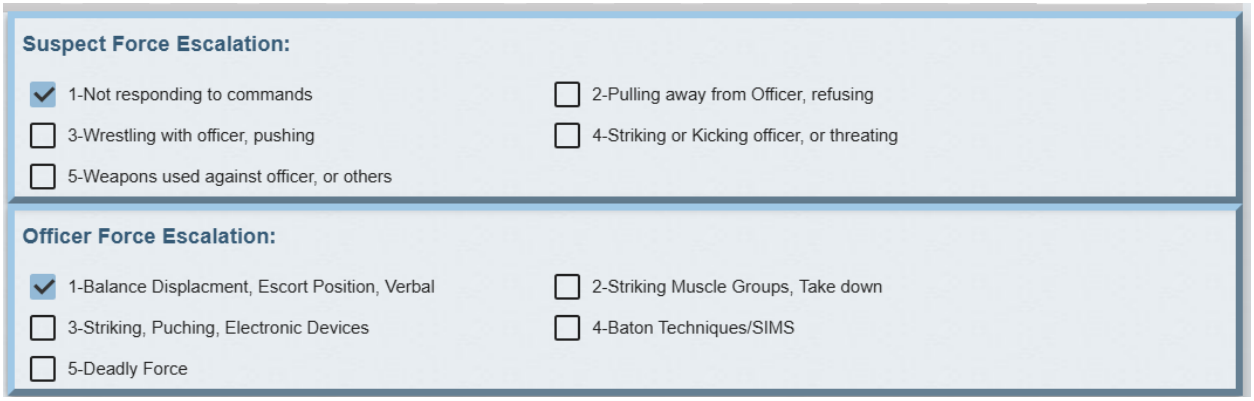
Force Escalation



The **Force Escalation** tab is for marking the level of force escalation in the use of force. Add the suspect and officer force escalation, and also add how the officer responding in each appropriate level.



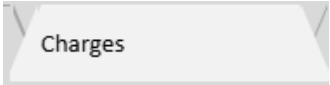
First, mark both the **Suspect Force Escalation** and the **Officer Force Escalation**.



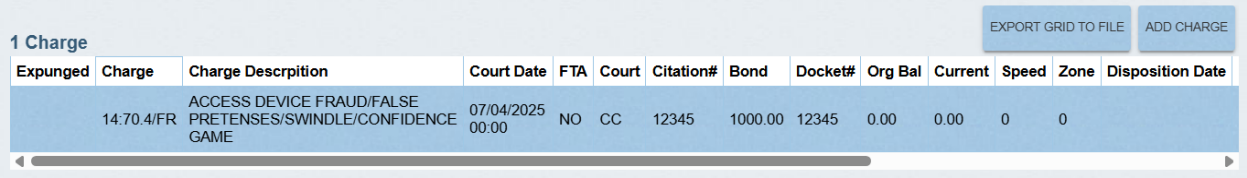
Now add how the officer responding for each level of force escalation:



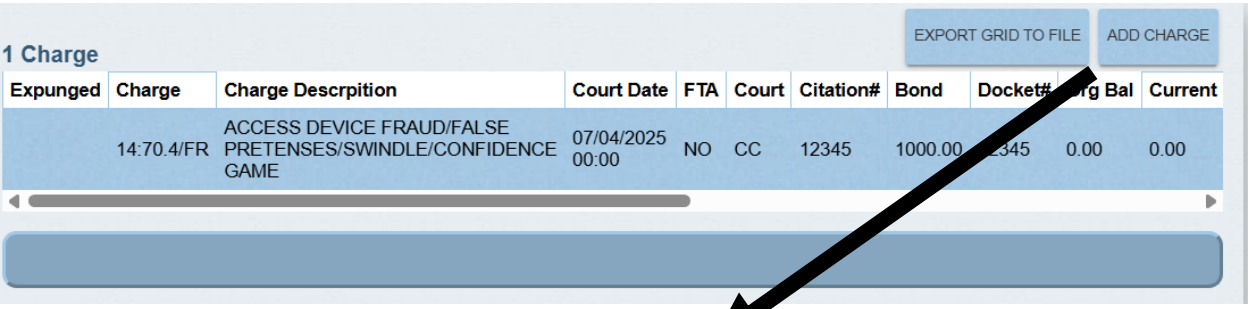
Charges Tab



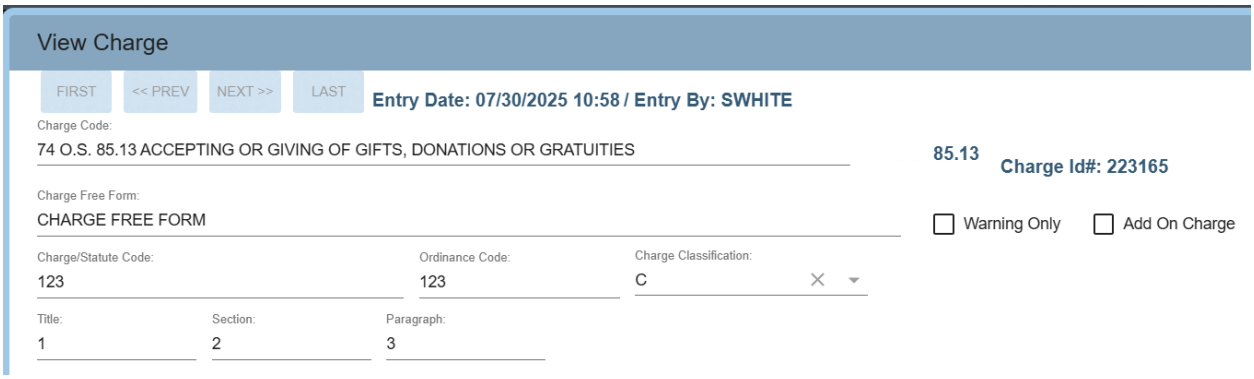
The **Charges Tab** is where the charges related to this pretrial are entered. You will enter the charges and information related to each charge.



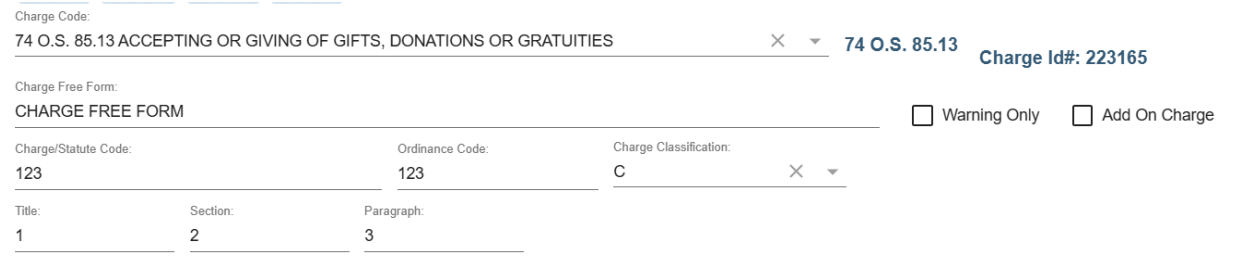
Use the **Add Charge** button at the far right to add a charge.







Enter the charge details into the fields and click **SAVE** to avoid losing work. Then reopen the charge by double-clicking it and continue editing.

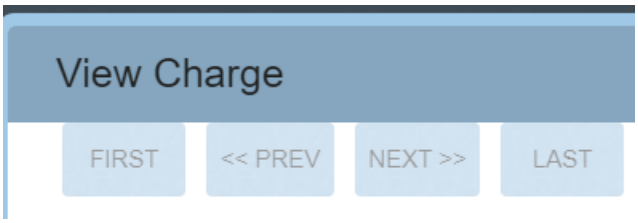


Fill in as much information as possible: more can be added later as needed. There is a list of tabs in the middle of the screen and each tab is a button that opens new details on **Charge Detail**, **Disposition**, and **Expungement** (if you are a Super User).



Additional Information on the Charges Tab

Multiple charges can be added. Click **Save** at the bottom of this screen after entering the information for each charge and use the **Exit** button when done. You can also use the navigation buttons at the top left of this screen (**First, Prev, Next, Last)** to move between the charges quickly without having to close the entire screen.

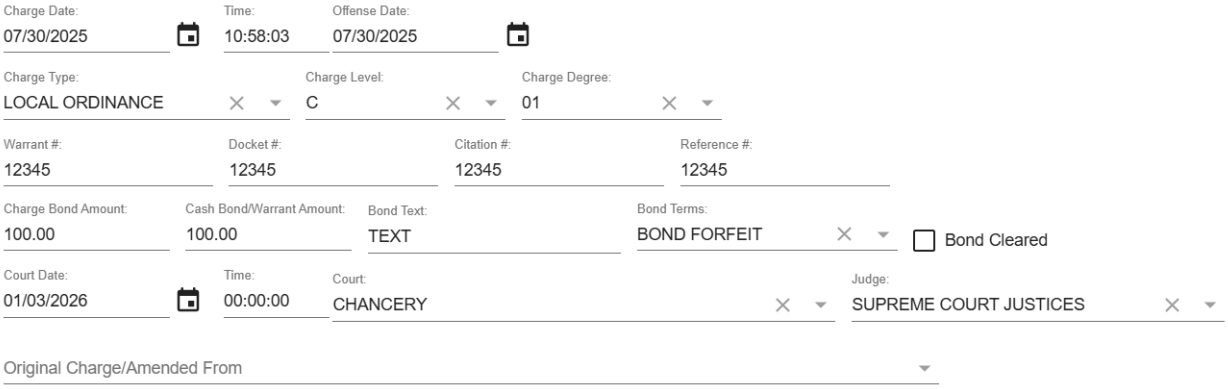


Charge Sub-tabs

Charge Detail Tab



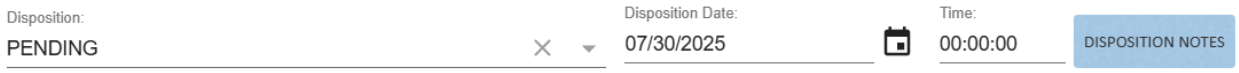
Under the **Charge Detail** tab, add additional information on the charge, the court date, etc.



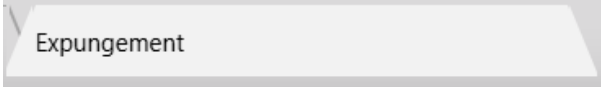
Disposition Tab



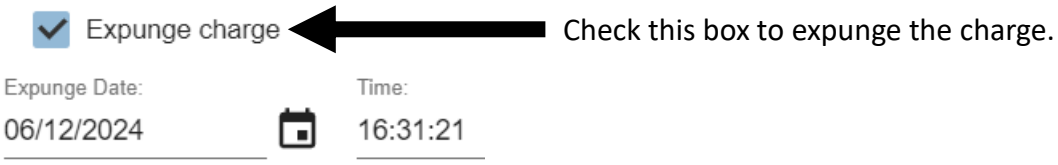
The **Disposition** tab should be filled out once this charge has been disposed and you can add details and additional disposition notes.



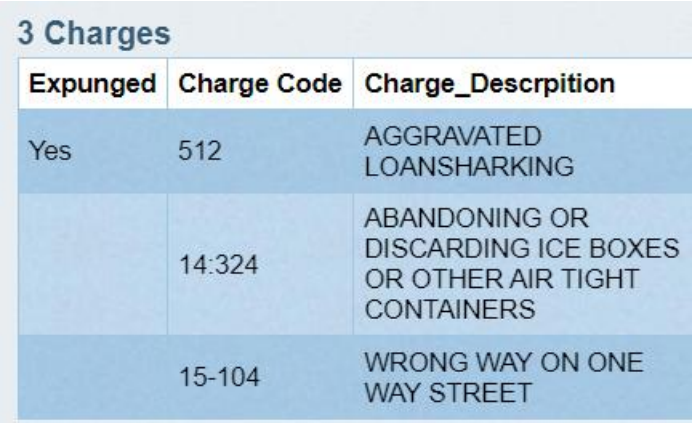
Expungement Tab



The **Expungement** tab allows Super Users to expunge this charge. Only users with these security privileges can see charges once they have been expunged – all other employees will not see the charge if the **Expunge Record** checkbox is checked.



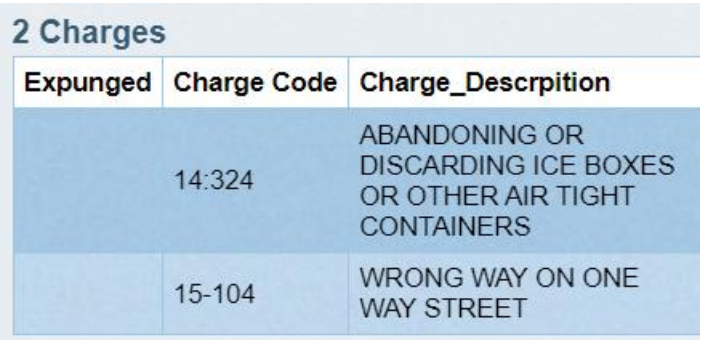
Users with the proper security privileges will see all charges, including expunged charges:



3 Charges

Expunged	Charge Code	Charge_Descrpition
Yes	512	AGGRAVATED LOANSHARKING
	14:324	ABANDONING OR DISCARDING ICE BOXES OR OTHER AIR TIGHT CONTAINERS
	15-104	WRONG WAY ON ONE WAY STREET

Users without expungement security privileges will *not* see the expunged charges:



2 Charges

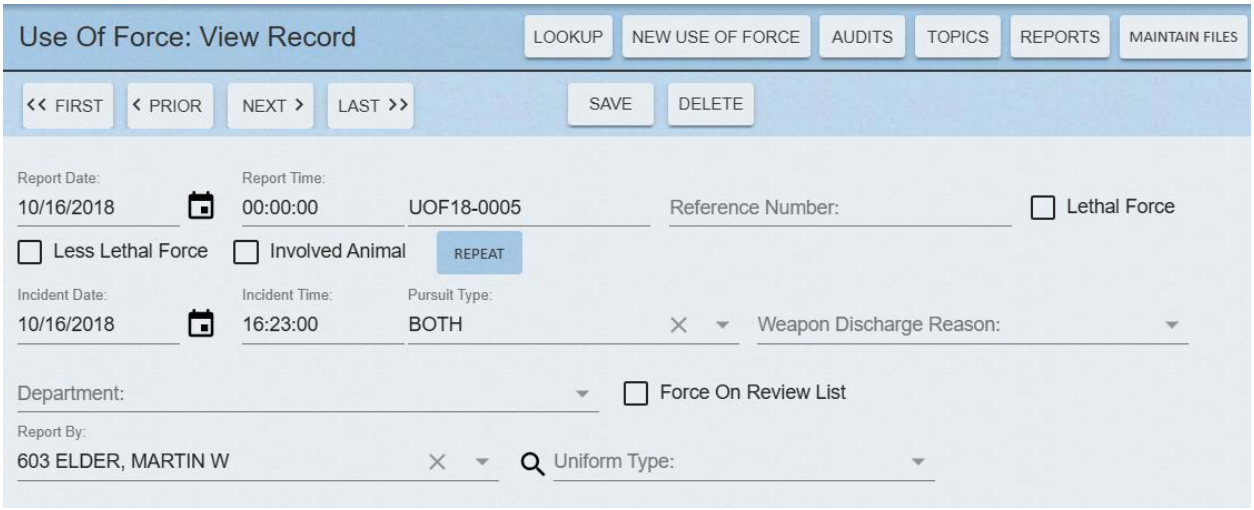
Expunged	Charge Code	Charge_Descrpition
	14:324	ABANDONING OR DISCARDING ICE BOXES OR OTHER AIR TIGHT CONTAINERS
	15-104	WRONG WAY ON ONE WAY STREET

If the charge was improperly or accidentally expunged, a Super User or an employee with expungement permissions can uncheck the box and the charge will be visible to all users again.

Repeating Use of Force Records

If you wish to copy the information in a record, you can do so by repeating the record.

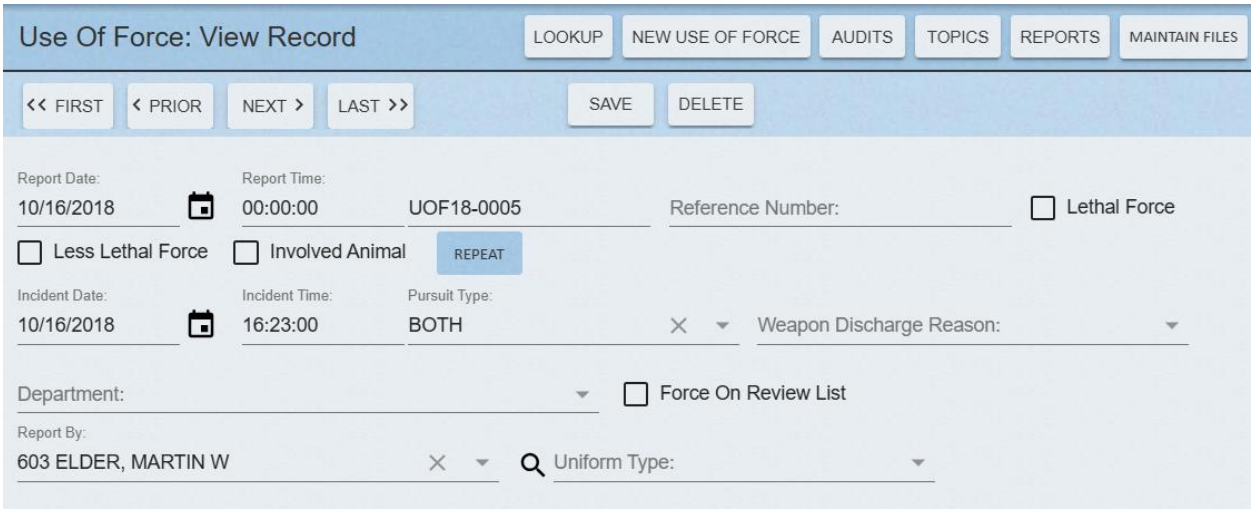
Navigate to the record you wish to copy:



Click the **REPEAT** button near the fields. Confirm you wish to copy/repeat, and a new record will be created.



The new record will be created with several of the fields copied.



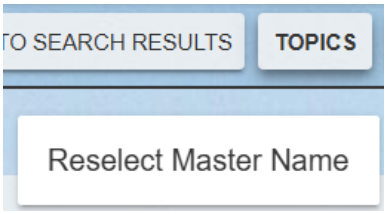
Reselecting Master Name

iSOMS has a function which allows you to reselect the Master Name for a Use of Force record.

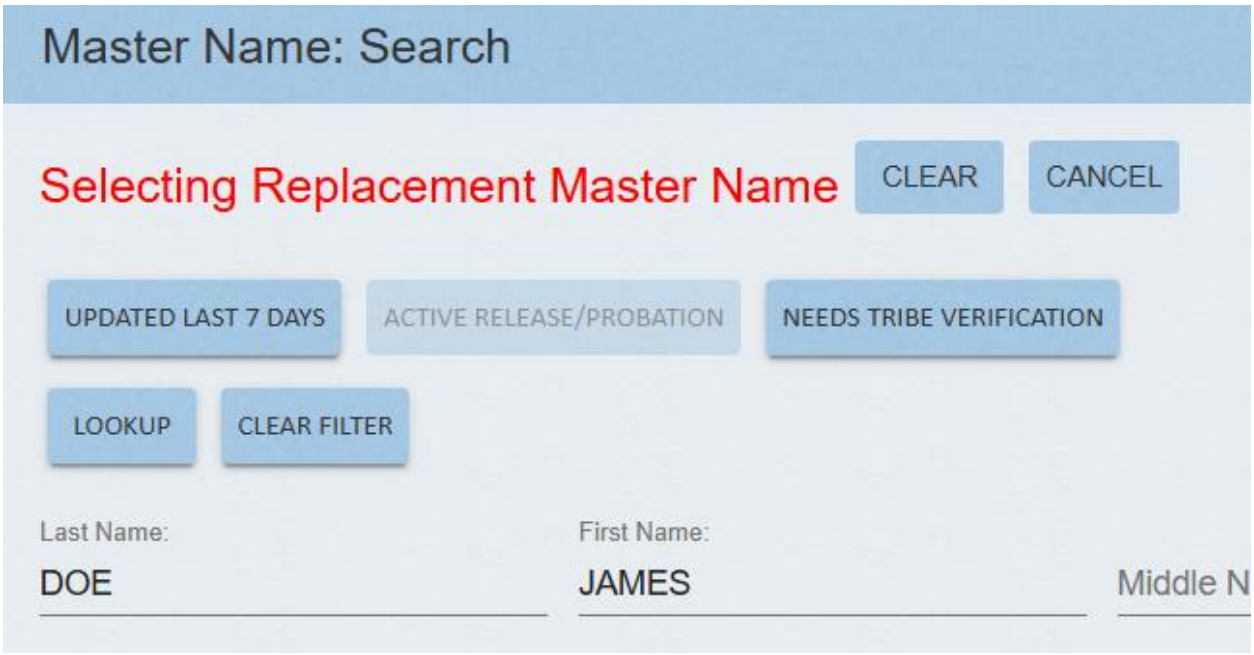
First, go to the record you want to switch the Master Name for and open its record in iSOMS.



Now click **TOPICS → RESELECT MASTER NAME**



This will open a screen where you can search for a Master Name to select for the record. Enter your search parameters and find the correct record. Then select it to replace the current Master Name with the correct one.



Use of Force Reports

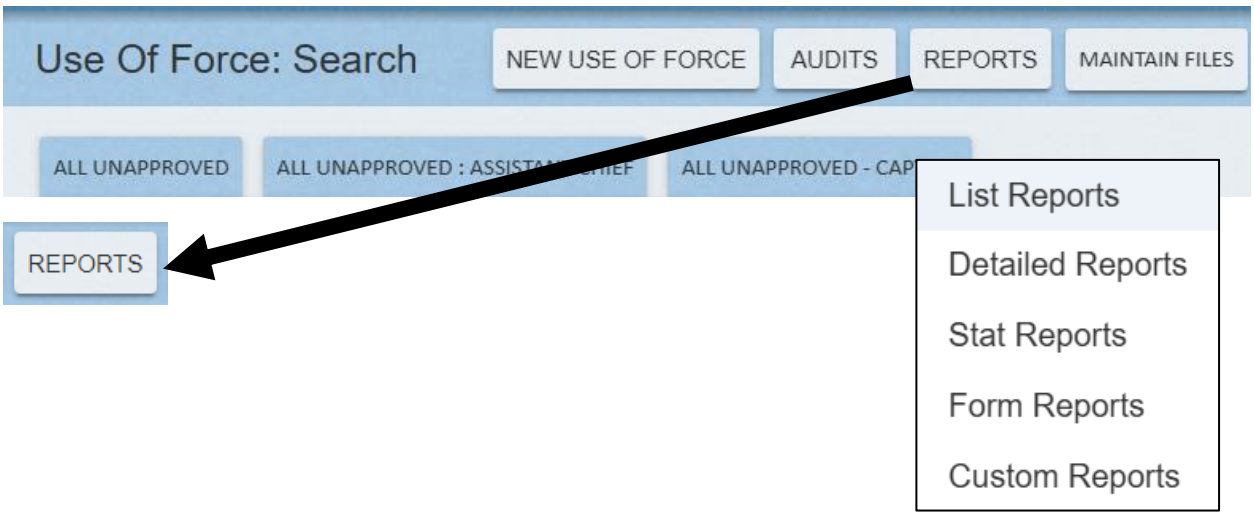
iSOMS has the capability to allow you to print different types of reports for Use of Force Records.

To access the reports, begin on the iSOMS home screen. Navigate to:

Corrections → Inmate Tracking → Use of Force

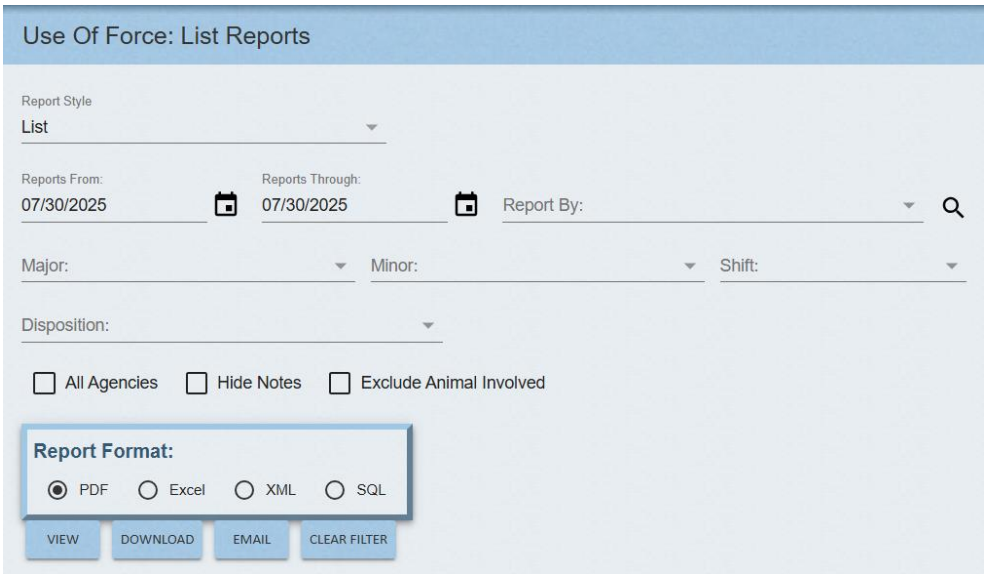


Now click on the **Reports** button in the upper right corner and select the report you wish to run. Different reports are explained over the next set of pages.

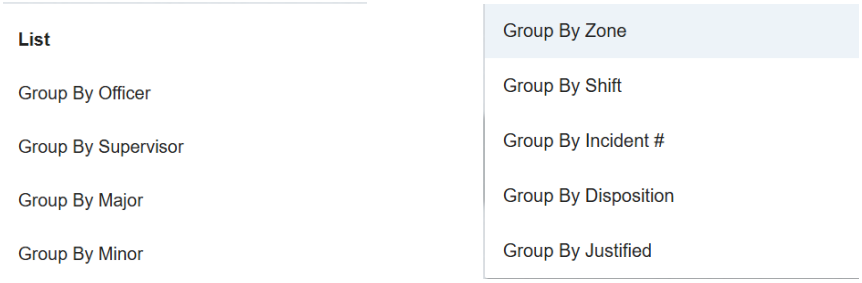


List Reports

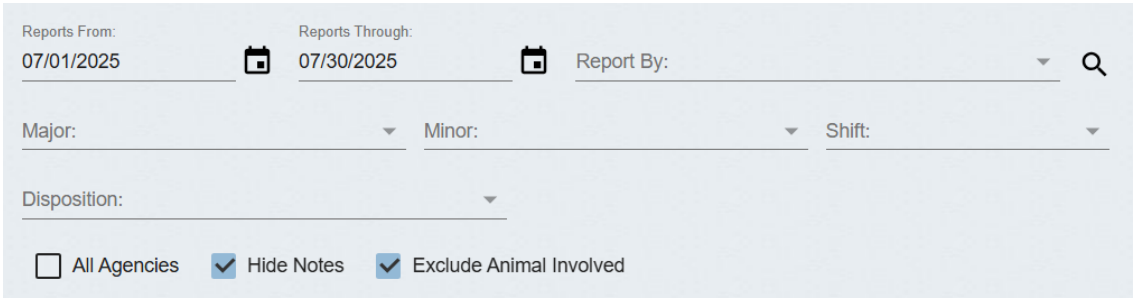
The **List Report** displays Use of Force reports in your iSOMS records over a certain date range. In this way you can see an overview of use of force records over your chosen time period. Add the start and end date in **Reports From** and **Reports Through.**



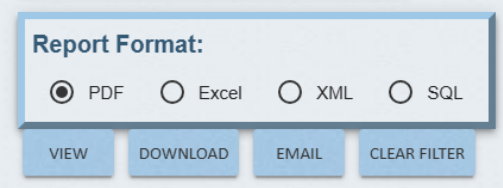
Report Style has many different layout and sorting options, such as *List, Group by Officer, Group by Supervisor, Group by Disposition*, and more. Pick the one most relevant to your desired result.



You can add certain filters to reduce the list if desired. Also choose if you want to hide notes or exclude animal involved reports:



Now, with your chosen parameters, click **View** or **Download** to view the report.



List Report

YOUR AGENCY

Use Of Force List

Report Dates From 07/01/2025 Through 07/30/2025

Page 1 of 1

Case #	Incident Date	Report Date	Address	CSZ
2025-0010		**07/21/2025 09:04**		

Zone:
Officer: **ELDER, MARTIN WILLIAM**
Major: **COURT SERVICES**
Minor: **CHAPLIN**
Supervisor: **ELDER, MARTIN**
Suspect: **DOE, JAMES RANDAL**
Justified:
Disposition:

School:
Badge: **603**
Rank: **INVESTIGATOR**
Shift: **3**
Incident #:
Disposition Date:
Within Policy:

---

12 **09/19/2024 17:38** **07/24/2025 10:35**

Zone:
Officer: **ELDER, MARTIN WILLIAM**
Major: **COURT SERVICES**
Minor: **CHAPLIN**
Supervisor: **ELDER, MARTIN**
Suspect: **DOE, JOHN**
Justified:
Disposition:

School:
Badge: **603**
Rank: **INVESTIGATOR**
Shift: **3**
Incident #: **12**
Disposition Date:
Within Policy:

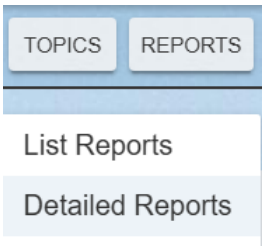
Detailed Report

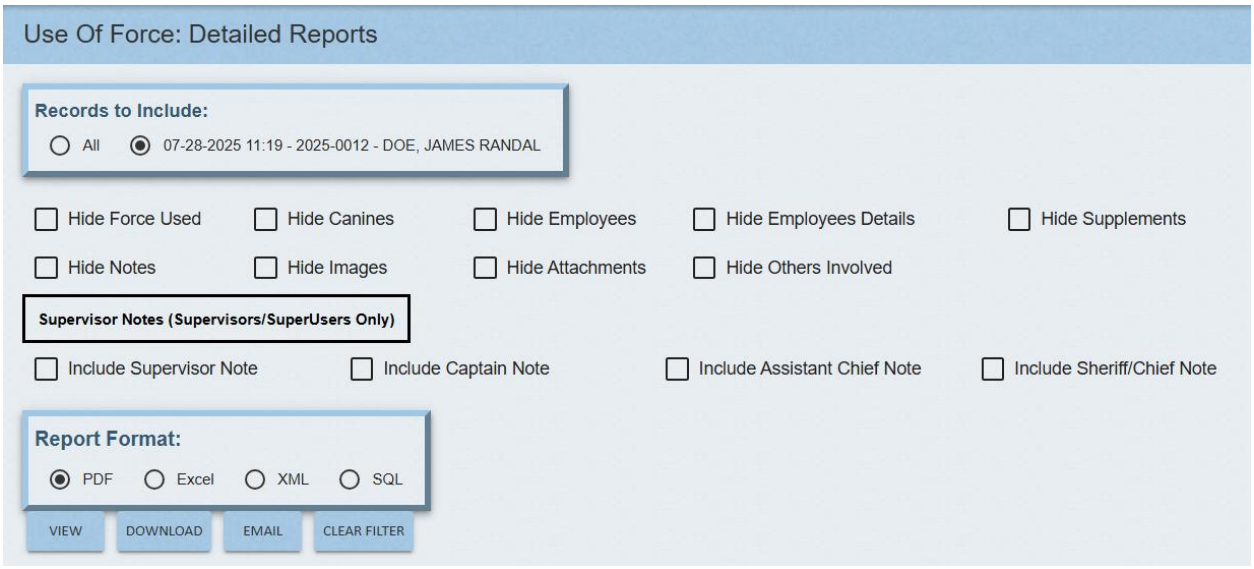
The **Detail Report** displays many details for individual Use of Force incident reports in your iSOMS records.

First, go to the record you want to make a detail report for and open its record in iSOMS.



Then click **REPORTS → DETAILED REPORT** to open the Detail Report screen.





Choose what you would like hidden on the report, such as images, employees, other people, supplements, etc. And with your chosen parameters, click **View** or **Download** to view the report.



YOUR AGENCY

Use Of Force Details

Use Of Force Information

Case #:	**2025-0012**	Reference #:	
Report Date:	**07/28/2025 11:19**	Incident Date/Time:	**07/28/2025 00:00**
Pursuit Type:	**VEHICLE**	Assignment:	**ON ASSIGNMENT A**
Lethal Force:	**NO**	Less Lethal Force:	**NO**
Force On Review List:	**YES**	Department:	**DRUG ENFORCEMENT AGENCY**
Involved Animal:	**NO**		

Report By Information

Report By:	**ELDER, MARTIN WILLIAM**	Badge:	**603**
Major:	**COURT SERVICES**	Rank:	**INVESTIGATOR**
Minor:	**CHAPLIN**	Shift:	**3**
Supervisor:	**ELDER, MARTIN**		

Incident Information

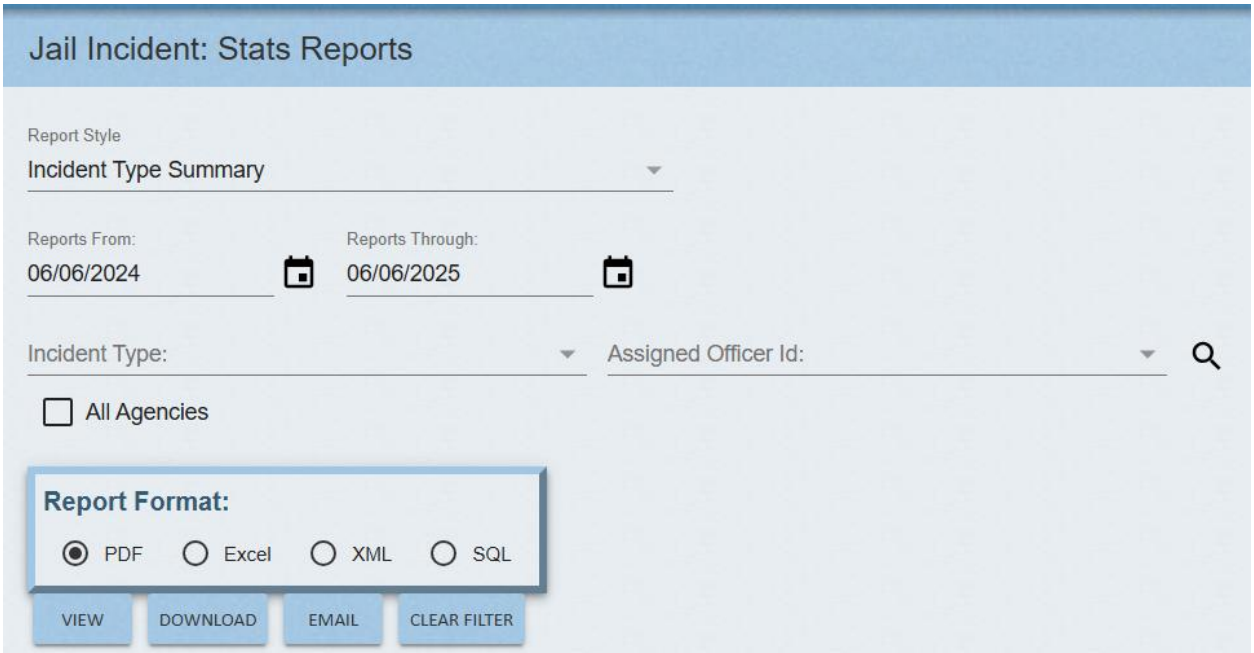
Common Name:	**THE BIG HOUSE**	Zone:	**101 ZONE 1**
Address:	**123 W MAIN ST**	SubDivision:	**CITY CENTER**
CSZ:	**KNOX, TN 37912**	School:	

Suspect Information

Name:	**DOE, JAMES RANDAL**	Race:	**WHITE**
Address:	**123 W MAIN ST**	Sex:	**MALE**
CSZ:	**KNOX, TN 37912**	Hispanic:	**NO**
DOB:	**01/01/1965**	Height:	**502**

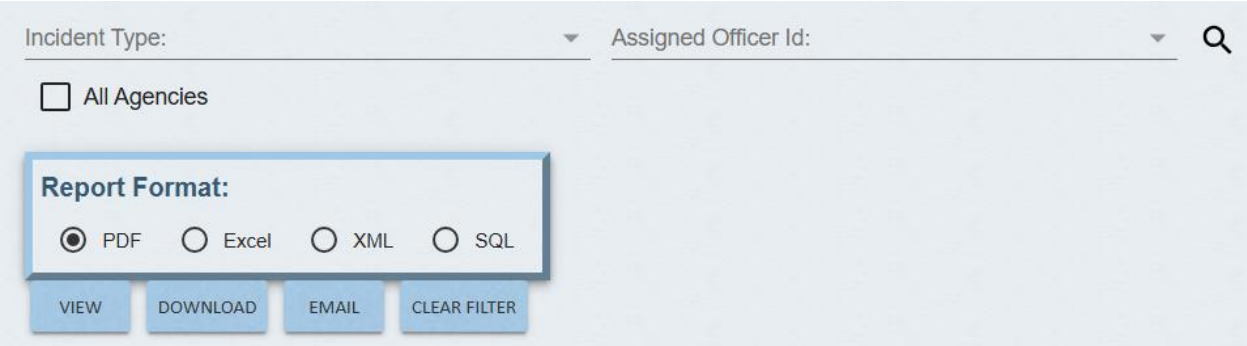
Stat Reports

This report displays Use of Force stats in your iSOMS records over a certain date range. In this way you can see statistics for your records over a certain period. Add the start and end date in **Reports From** and **Reports Through.**



Report Style has two different layout and sorting options, *Stats* and *Stats by Race/Sex with Ethnicity*.

You can add certain filters to reduce the list if desired, such as only including a certain reporting officer or shift. Now, with your chosen parameters, click **View** or **Download** to view the report.



YOUR AGENCY

Use Of Force Stats

Report Dates From 07/01/2025 Through 07/30/2025

Time Of Day

Morning (06:01-12:00):	0
Afternoon (12:01-17:00):	0
Evening (17:01-20:00):	1
Night (20:01-06:00):	1

Number of Officers Involved

One:	0	Four:	0
Two:	0	Five +:	0
Three:	1		

Officer Injured

Yes:	1
No:	2

Officer Hospitalized

Yes:	1
No:	2

Force Used Before/After Contact

Before:	0
After:	1
Neither:	2

Suspect Injured

Yes:	1
No:	2

Mental Health Evaluations

Yes:	0
No:	3

Total Use Of Force Reports: 3

Force Presented

BATON	1
CANINE	1

Total Force Presented: **2**

Force Used

BATON	1
CANINE	1

Total Force Used: **2**

Force Effective

BATON	1
CANINE	1

Total Force Effective: **2**

Action Justification

YES	1

Response Within Policy

YES	1

Action Taken

NO FURTHER ACTION	1

Male

Female

Administrative Overview

Under the **Administrative** heading, iSOMS provides your agency ways to administrate inmates for work and service. You can use the *Administrative* modules to track community service, volunteers, work crews, lineups, and warehouse inventory. This section covers how to use the different iSOMS modules underneath the *Administrative* heading in *Corrections.*

The **Community Service** module allows you to record community service for inmates, including hours worked, employer for service, work history details, credit days for jail, and more. It allows you to search and view existing community service records, create new community service records for any inmate, add notes on the community service, view work history records, and run reports on community service records.

The **Lineup** module allows you to create lineups from inmate records. It allows you to search and select the inmates who you need to include in the lineup, either from traits or specific booking record info. You can also print lineups, and save created lineups for later.

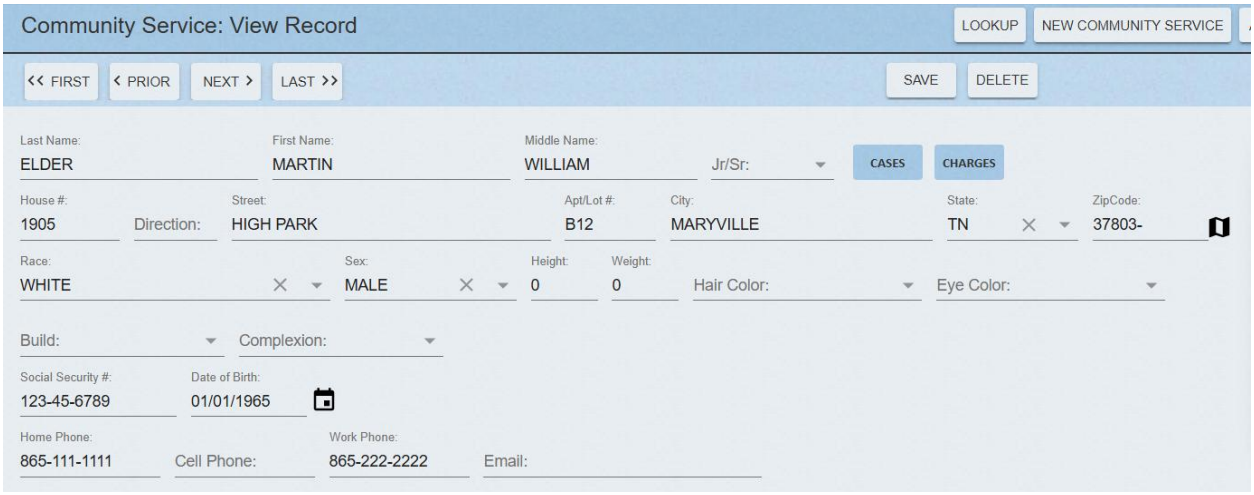
The **Volunteers** module is where you can keep track of volunteers who come to your agency to help out with inmates, services, etc. You can record where they are from, what they are doing, add records of when they visited, and more. The module allows you to search and view existing volunteer records, create new volunteer records, view volunteer visit records, and run reports on volunteer records.

The **Warehouse Inventory** (Jail Supply) module is where you can track items for your agency. These items are typically for use in the other types of modules here, i.e. items for use in community service, work crews, etc. These items are separate from, for example, assigned property in Booking or the items added in Commissary Items. You can search and view current item records, add new item records, add transactions for items, and run reports on item records.

The **Work Crew** module allows you to record work crew details for inmates, including who is being worked for, inmates on the crew, officers involved, expenses, fuel, and more. It allows you to search and view existing work crew records, create new work crew records, and run reports on work crew records.

Community Service

Community Service allows you to track community service for individuals. You can record credits for the work performed, what program they are involved in, the employer, and more. You will also be able to keep a detailed record of the times and places they worked. This section will explain searching existing community service records, creating a new community service record, and filling out a community service record.



The first part of this section explains searches. If you need explanations on an already existing record, see the *Filling Out a Community Service Record* to get more information on the different fields and tabs available.

Searching for Existing Community Service Records

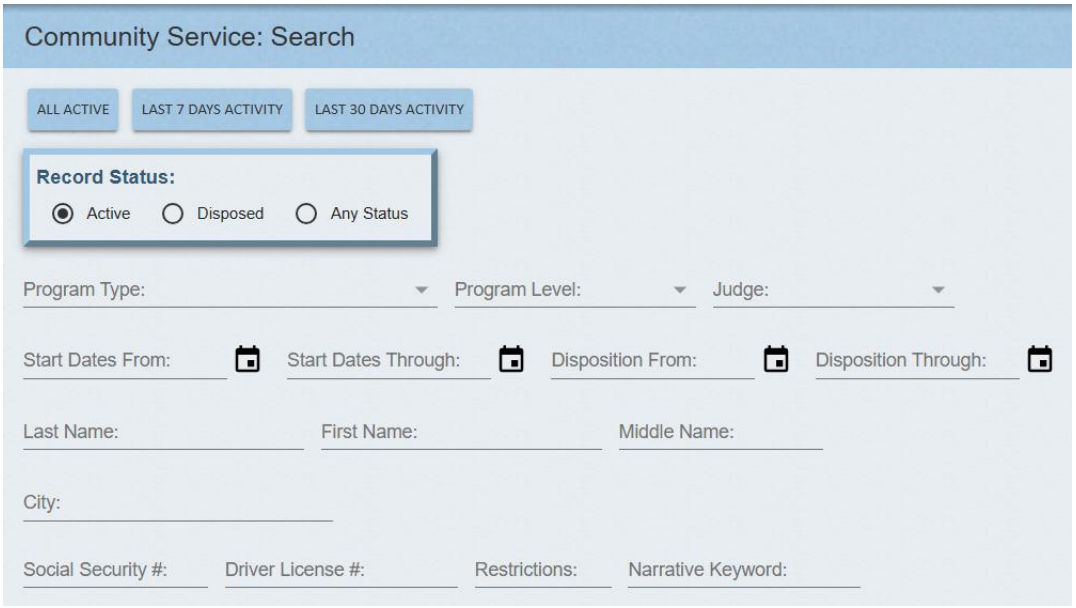
To search existing records, begin on the iSOMS home screen.

Navigate to:

Corrections → Administrative → Community Service

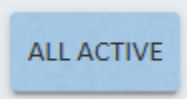


This will open the **Community Service: Search** screen. Here you can search and filter for different community service records. You can either use the blue buttons to do *quick searches* or enter information in the fields to do *standard searches.*



Quick Searches

A few different quick searches are available by using the blue buttons.

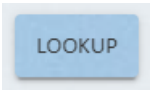


All Active simply returns all records that are active (i.e. no **Disposition Date**).



Last 7 Days Activity and **Last 30 Days Activity** will show you all the records in the specified recent time periods.

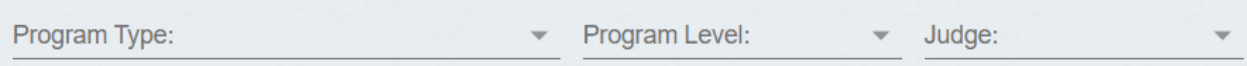
Standard Searches





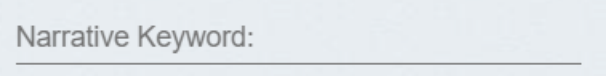
Various fields are available if you need to do a search that the quick searches won't work for. Fill in the fields to narrow the search and click **Lookup** at the top or bottom of the page to perform the search. If you need to start over, simply click **Clear Filter** to remove all search field entries.

Field Explanations



These fields let you search for community service records based on classification or judge. **Program Type** usually includes *Work Release* and *Two for One* options.

Program Level has options such as *Anytime* or *Weekends.* Judge lets you pick the judge marked on the record.



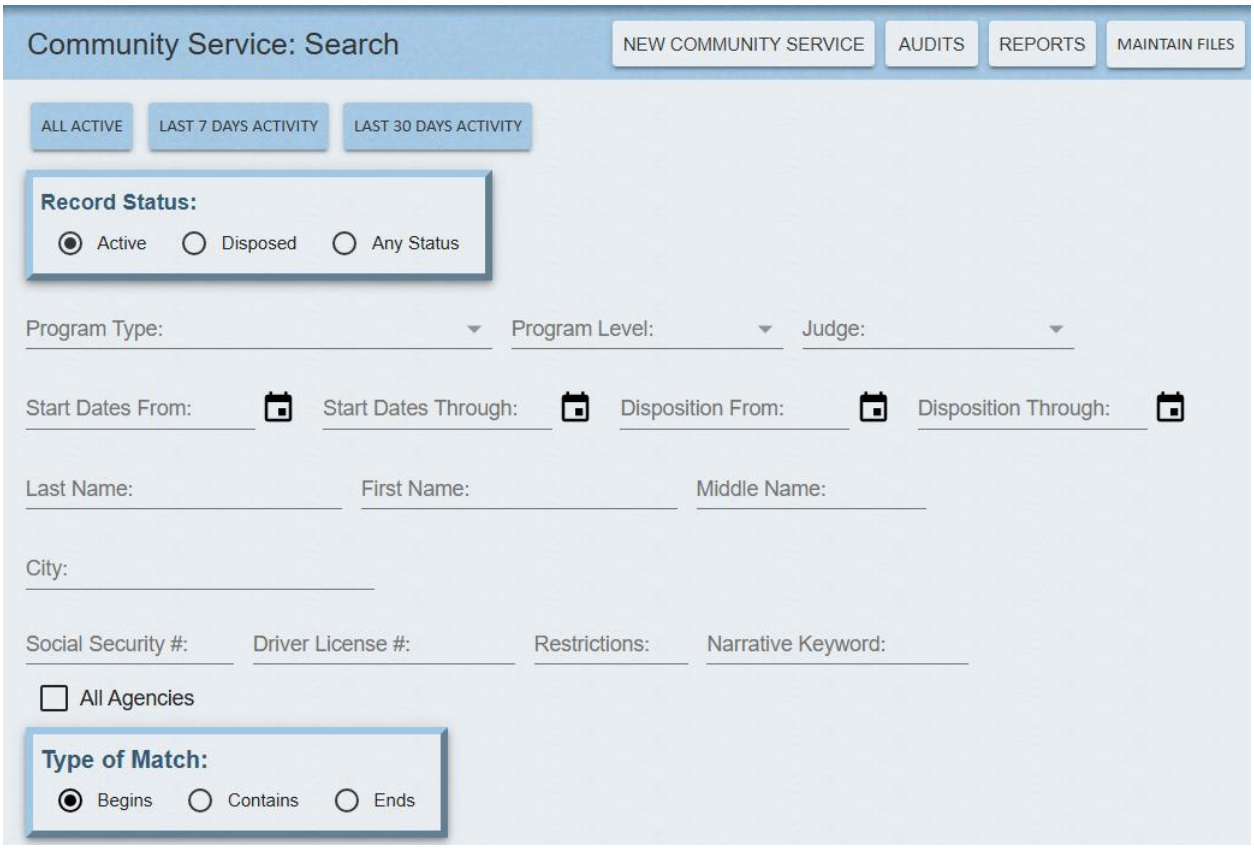
The **Narrative Keyword** field lets you search for words in the narrative of reports.

As mentioned above, when you have finished with your search parameters, click **Lookup** to perform your search. Double click on the desired entry to view or edit the record.



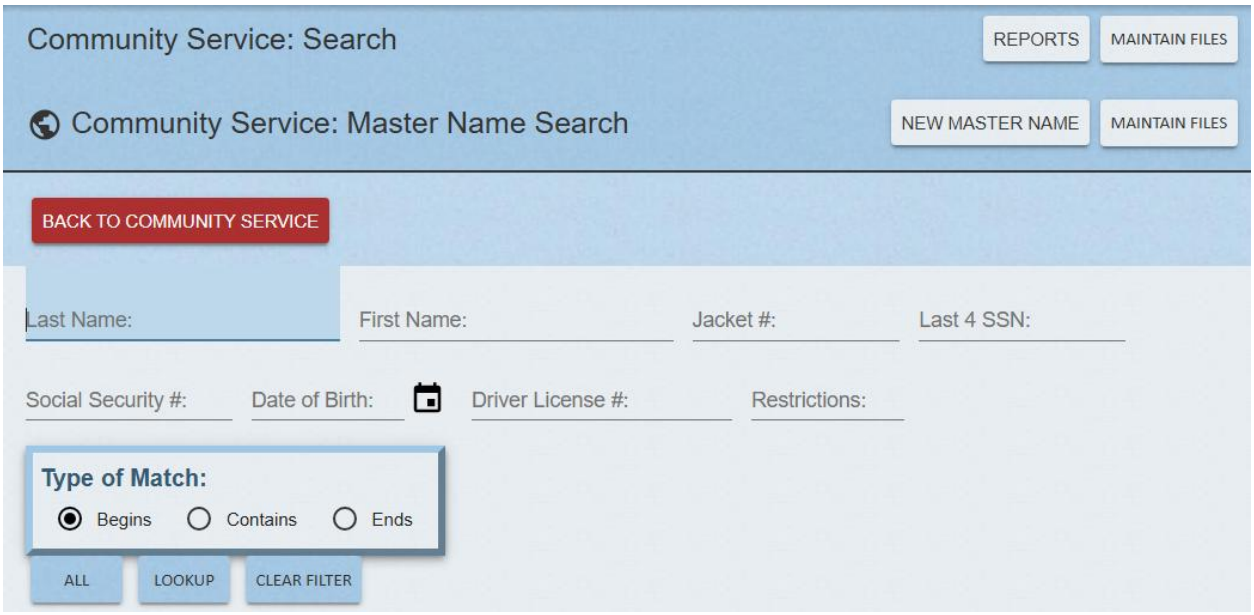
Creating a New Community Service Record

To create a new community service record, click **New Community Service** in the upper right corner of the Community Service search screen:



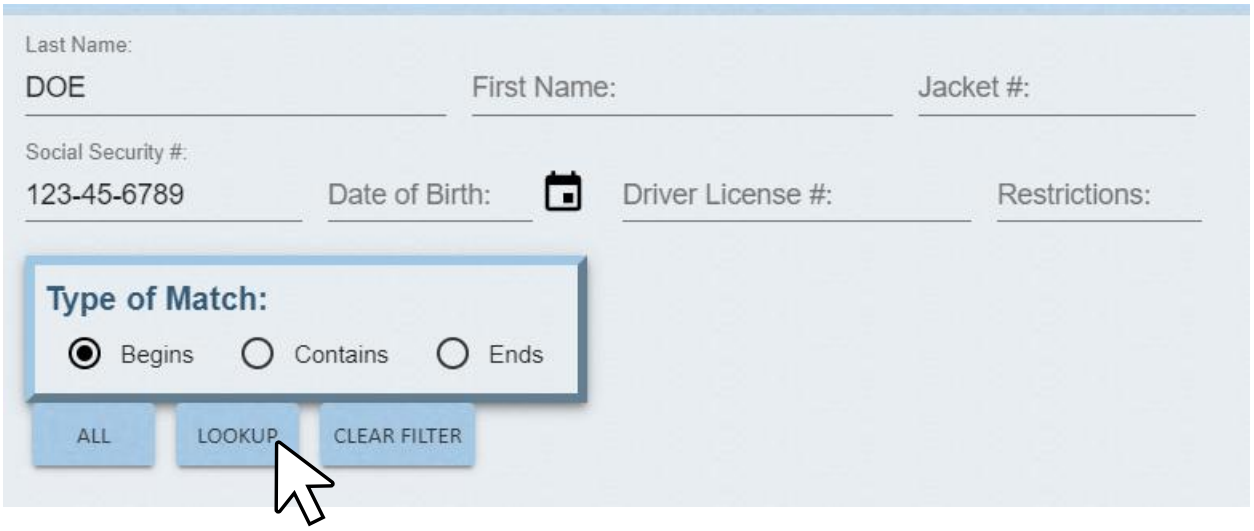
NEW COMMUNITY SERVICE

You will make an Community Service record using the Master Name entry of the individual involved.

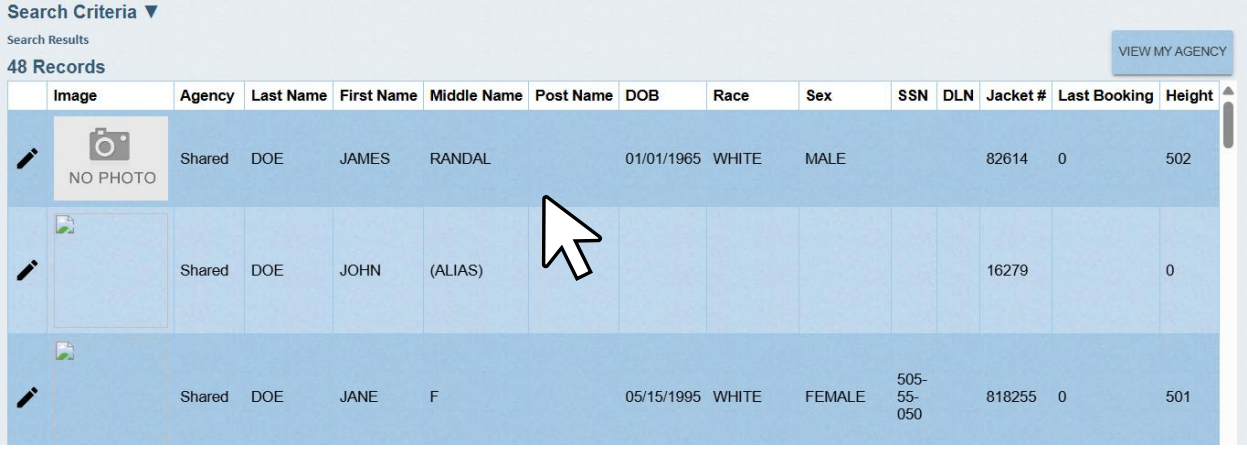


Search for the person for which you are creating a Community Service record, using *at least* two identifying pieces of information. You want to verify that the individual matches with the Master Name.

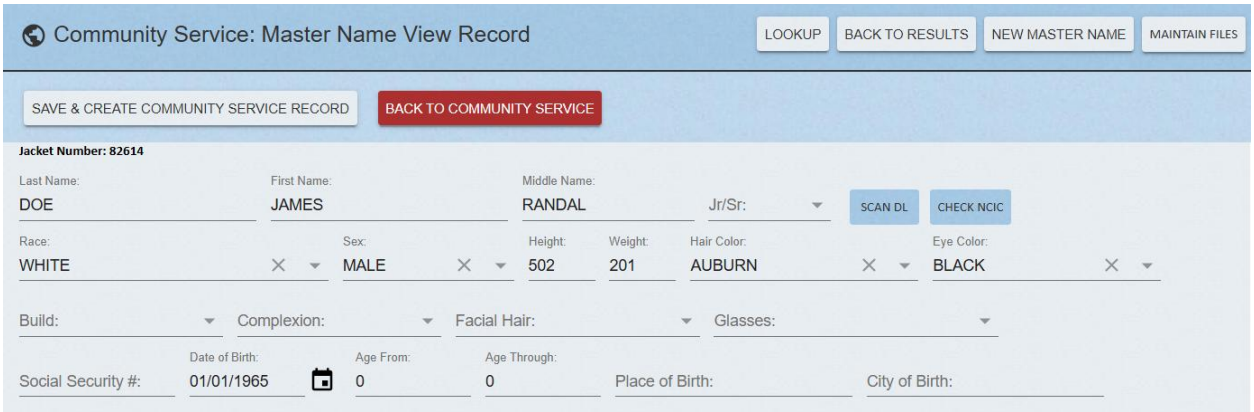
Click **LOOKUP** when you have the information you need.



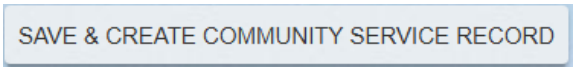
Double-click the appropriate Master Name from the results to open their record.



Verify the Master Name information is filled out correctly. If you don't have the person in the Master Names, you should create a new one. (See *Creating A New Master Name* on page 52.)

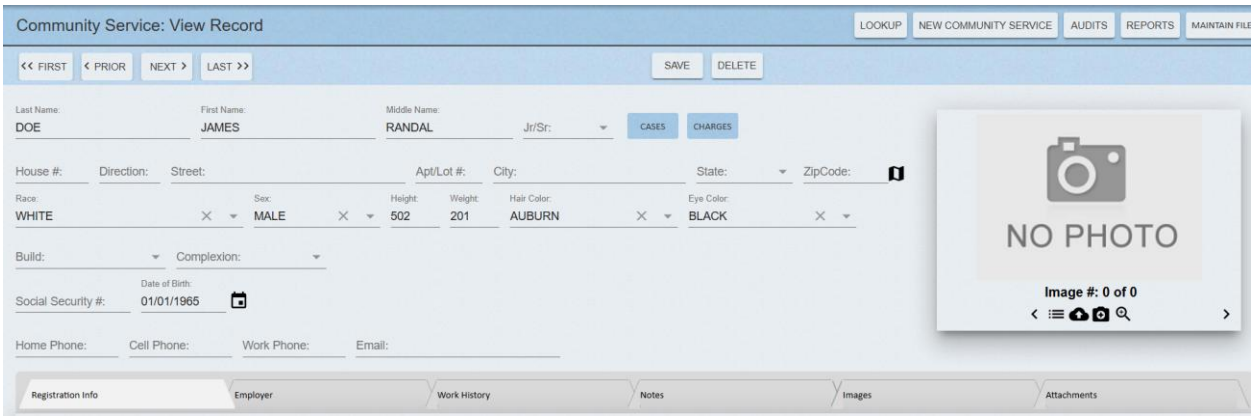


Click **Save & Create Community Service Record** when you are finished.



This will create and open the new record.



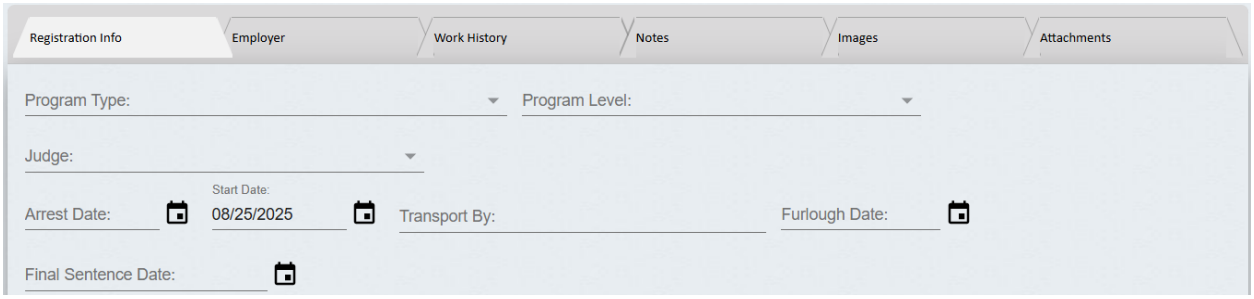


There are two primary sections of the report:

1. The *fields* in the upper part of the screen. These record details about the individual, their address, identifying info, and contact information.



2. The *tabs* record information about the community service registration, the employer, work history records, notes, images, and attachments.



Fill out the fields at the top of the screen and then make sure to fill out the following tabs as appropriate: **Registration Info, Employer,** and **Work History.** If other notes or attachments are needed, you can add them to **Notes, Images,** and **Attachments**. This process is covered in detail in the next section, *Filling Out a Community Service Record.*

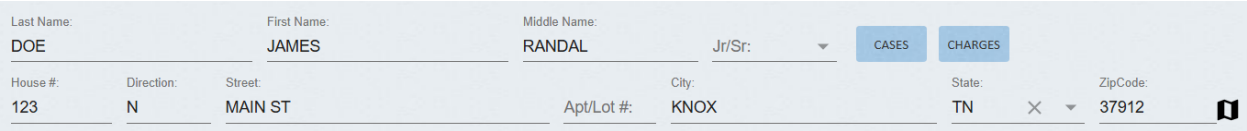
After you enter new details, make sure to click **Save** at the top of the screen.

Filling Out a Community Service Record – Fields

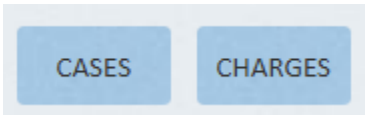
This section explains in detail the different fields and tabs for a community service record. The top section of the report with fields should always be filled out when relevant information is available, and the tabs should be filled out as needed.

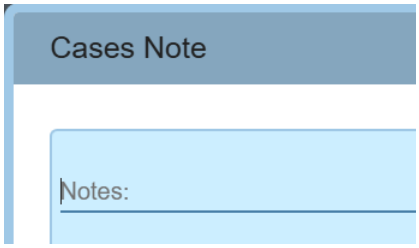
Most of these fields will be filled out automatically from the Master Name. If a given field is not being filled in, it likely is not filled in the Master Name.

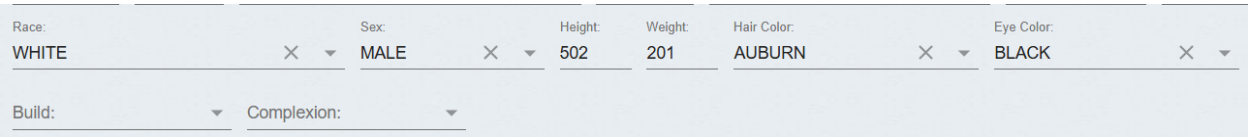
Fields



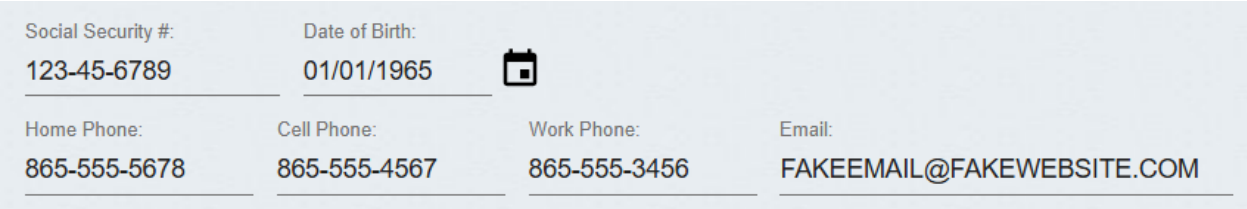
These fields relate to the name and address of the individual. You will also notice two buttons where you can add notes on the **Cases** and **Charges.** These can be used to summarize the cases and charges the individual is involved in if you wish.





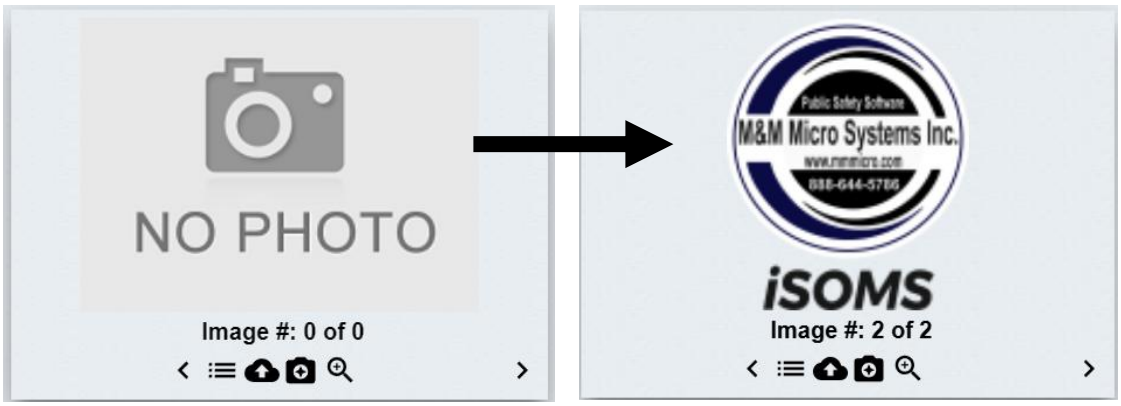


These fields relate to the appearance of the individual.



These fields relate to the identifying information and contact information of the individual.

If you would like to add an image of the individual, you can click **Upload Image ( )** or **Take New Photo ( )** on the right. Select or take the image and it will be added.



Remember to hit **Save** at the top of the screen often as you fill out the record to avoid losing information.

***Save** is located at the top of the screen.*



Filling Out a Community Service Record – Tabs

Summary

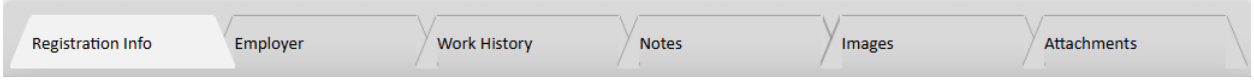
Fill out the tabs below the fields as needed.

The **Registration Info** tab contains fields for details about the Community Service Program, arrest and disposition info, credits, and more.

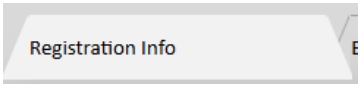
Employer lets you record the employer for the community service, the occupation, supervisor, and employment details.

Work History lets you log instances of work and details about them. You can also use the *Update Total Program Credits* button to add to the individual's program credits.

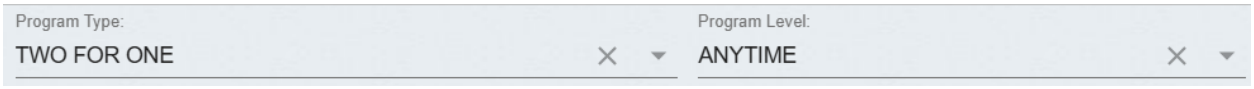
Notes, **Images**, and **Attachments** tabs are available if you need to take additional notes or upload images and documents.



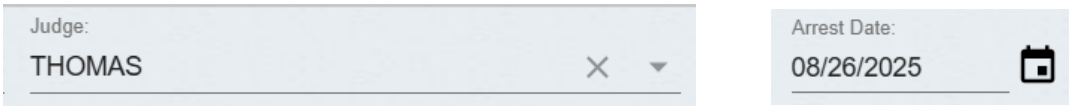
Registration Info Tab



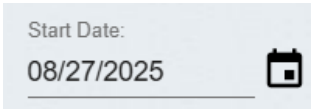
The **Registration Info** tab contains information on the community service registration, the program details, credit calculations, arrest date, transport officer, and disposition. Fill out this tab when you first create the entry, and then add additional details as needed.



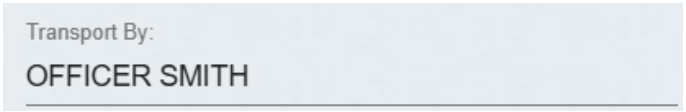
First, add the **Program Type** for the community service program the person is involved in, such as *Two for One* or *Work Release*. Then add the **Program Level**, such as *Weekends* or *Anytime.*



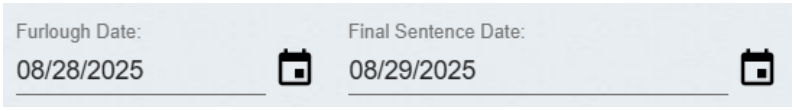
Now you can add the **Judge** and **Arrest Date** related to this service, if applicable.



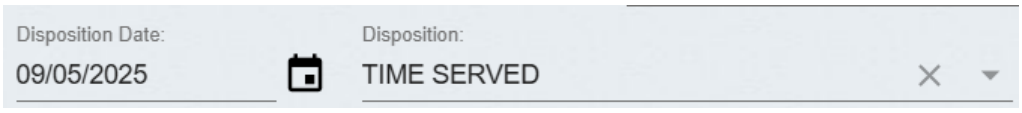
Start Date is for the start of the community service and will auto-populate with the current date.



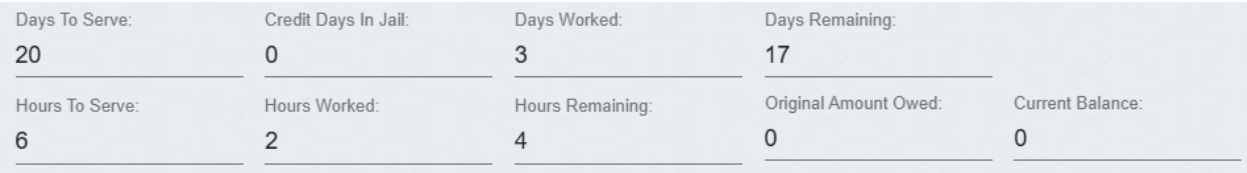
Transport By lets you list who is transporting the individual to work.



You can add a **Furlough Date** and the **Final Sentence Date** if they are needed.



Once the Community Service is finished or abandoned, add a **Disposition Date** and **Disposition**. The date is the field that makes this record inactive. (i.e. it will not show in **All Active** searches.)

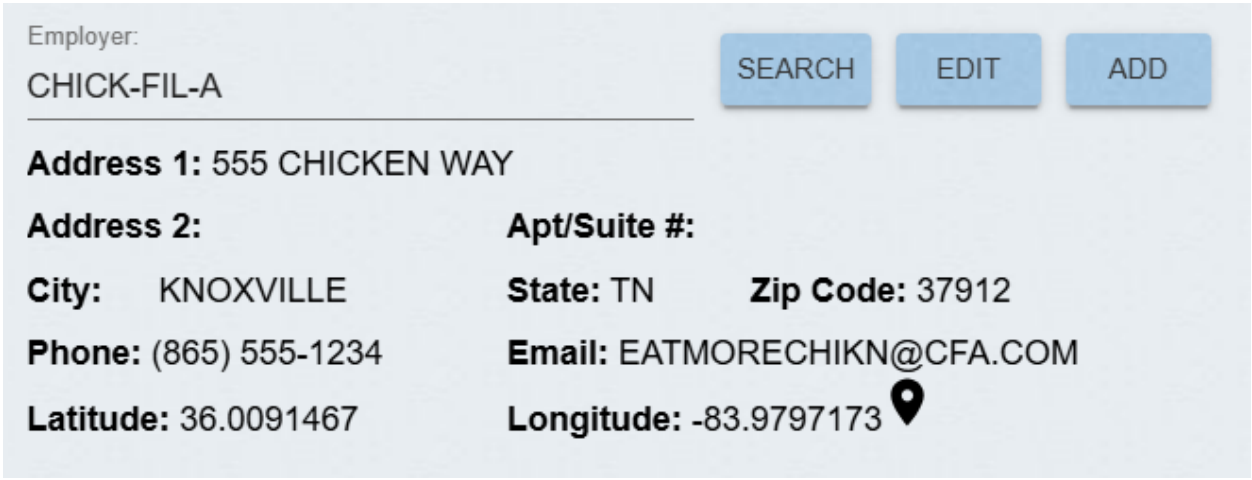


These fields are for manually calculating credit earned and days left to serve. These fields are not calculated automatically, but you can enter information and calculate manually.

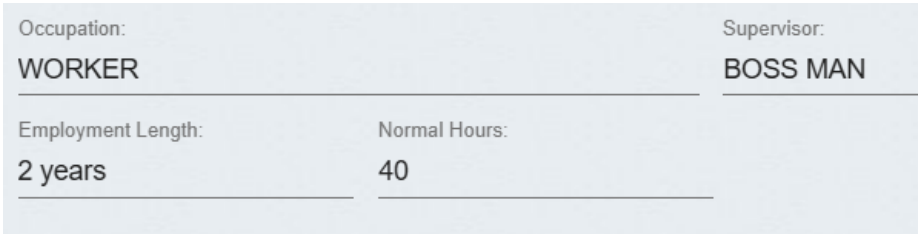
Employer Tab



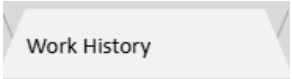
The **Employer** tab keeps information about the person's employment for community service. If you already have the business in your records, simply type the name (such as **CHICK-FIL-A**) and it will appear automatically. If you don't have the business in iSOMS or for more information on inputting new organizations into iSOMS for quick reference later, see *Appendix C, Business / Organization Records* on page 728.



You should also fill out some minor details about the position and employment history:

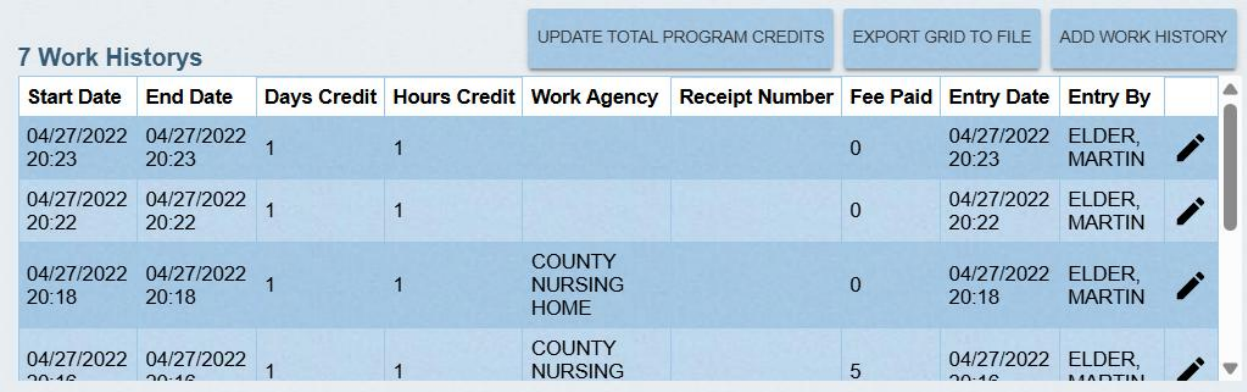


Work History Tab

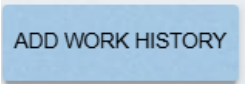


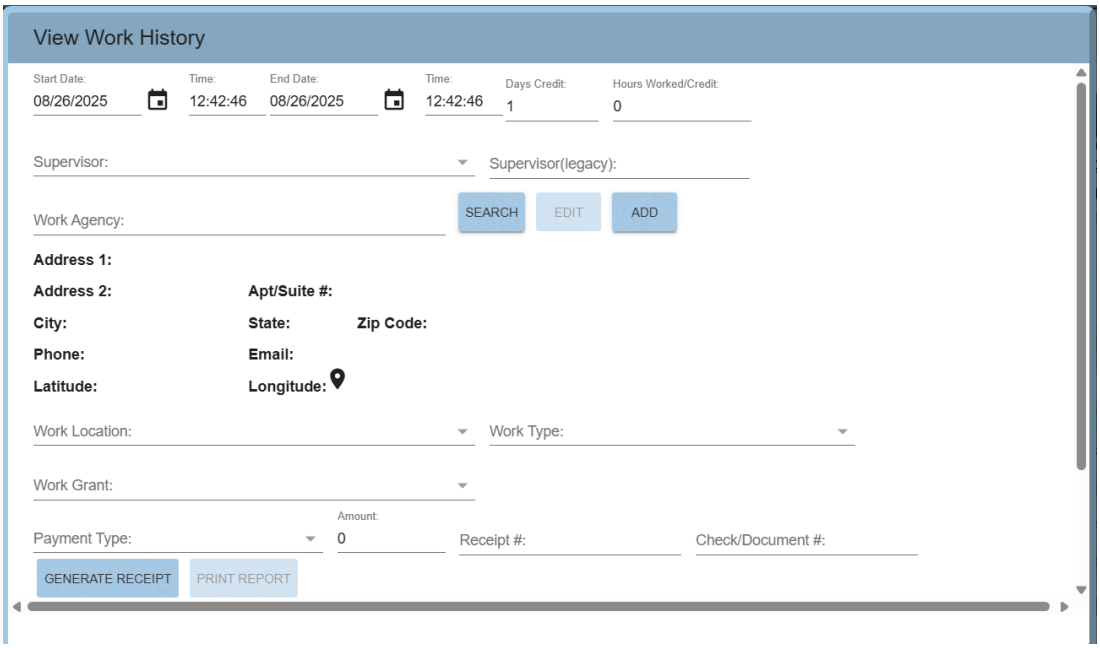
The **Work History** tab lets you record the work history of the inmate, days credited per work instance performed, and more.

To view, edit, or delete a current entry, double-click an entry from the table.



In order to add a new entry, click the **Add Work History** button. Confirm you wish to add a new entry, and then fill in the details.



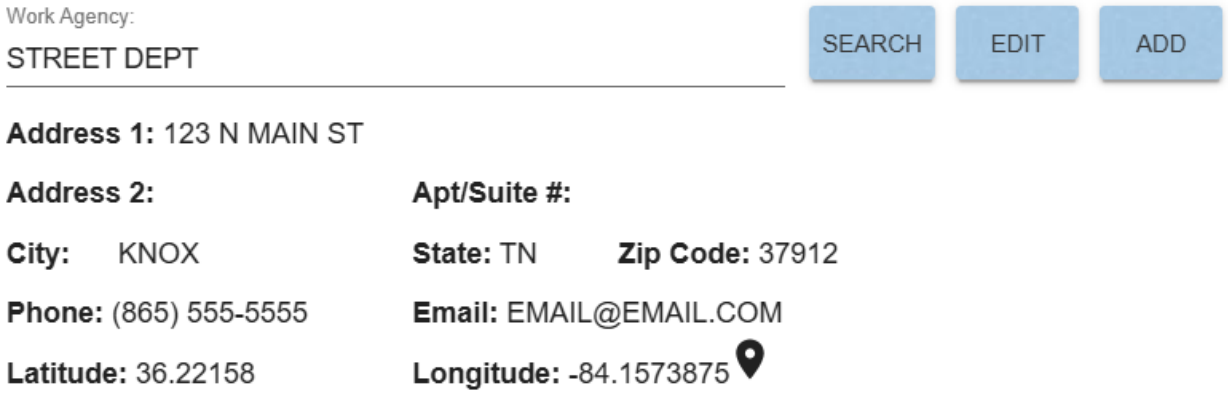




First, add the **Start Date** and **Time**, then the **End Date** and **Time** for the work performed, and then how much credit that translates to in **Days Credit** and **Hours Worked / Credit**.



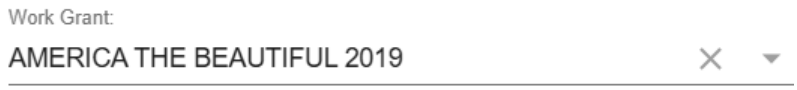
Now add the **Supervisor** in the dropdown available.



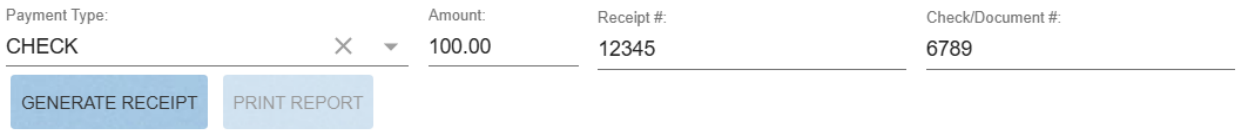
Add the work agency or location for work. If you don't have the business in iSOMS or for more information on inputting new organizations into iSOMS for quick reference later, see *Appendix C, Business / Organization Records* on page 728.



Now add the **Work Location** and **Work Type**.



If this work was funded, add the **Work Grant** in the dropdown.

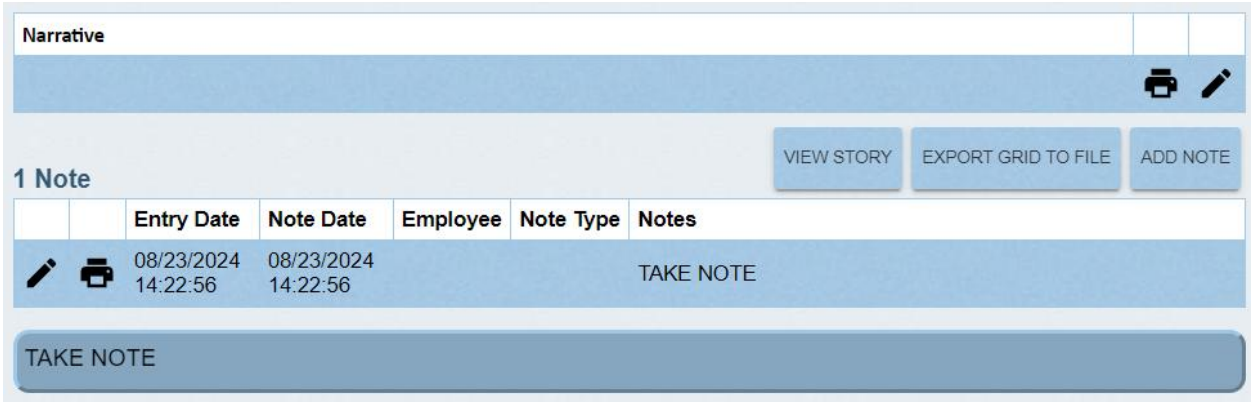


For payment info, add **Payment Type, Amount, Receipt #,** and **Check / Document #** (if needed).

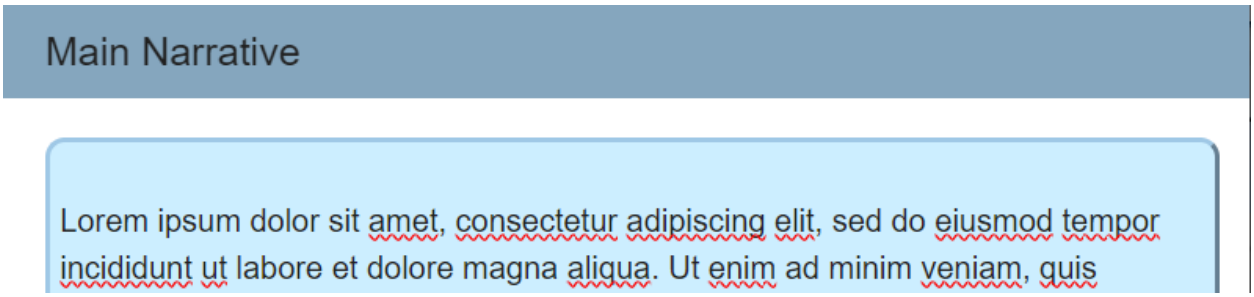
Notes Tab



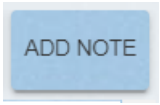
The **Notes** tab is used to view or add notes pertinent to the record. Double-click on any entry in the table to edit or view it.

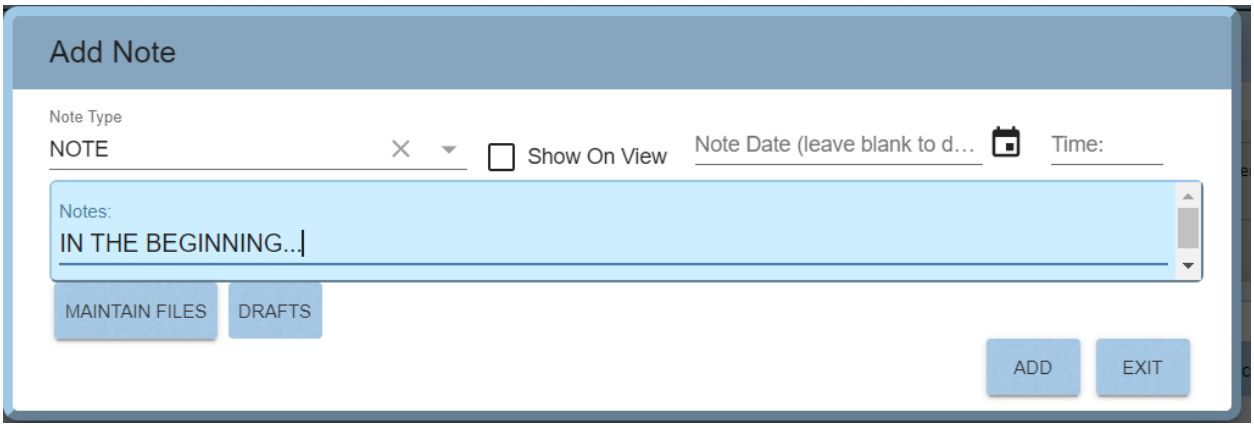


Narrative acts as an area where you can add a long note. This is useful when you want to add important or long form notes that won't be mixed in with the rest of the short notes.



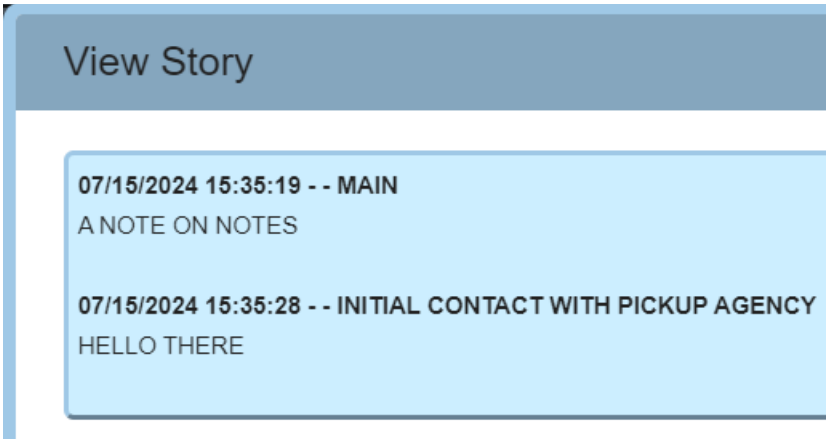
Use **Add Note** to add a new note.





The **View Story** button will show all notes (except Narrative) that have been added on one page.





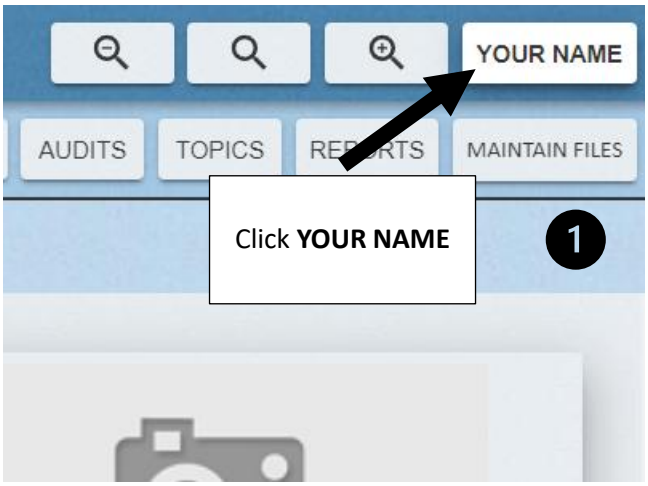
Images Tab

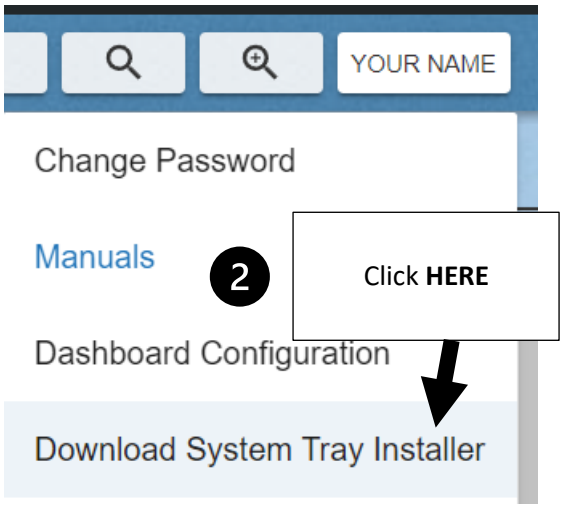


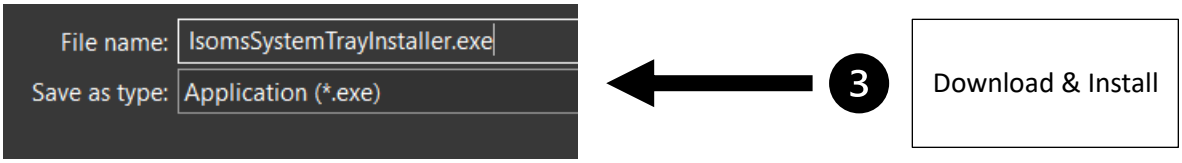
The **Images** tab is used to view, download, or add images. You can add a single image at a time or multiple images at a time. Click **Add Image** to add a single image.



To add multiple images at a time, you will need the System Tray Installer downloaded to the computer you are using. The System Tray Installer can be found on the iSOMS home page by clicking on the button in the upper right with your username. Once you click on that, you will get a drop-down list, and **Download System Tray Installer** is one of the options. Download and install it on this computer.

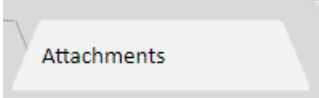




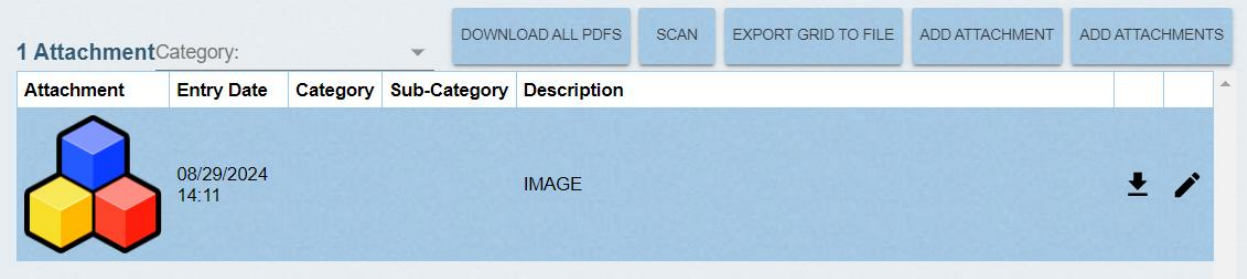


After you have the System Tray Installer on the computer, you can now use the **Add Images** button to upload multiple images at once if necessary.

Attachments Tab



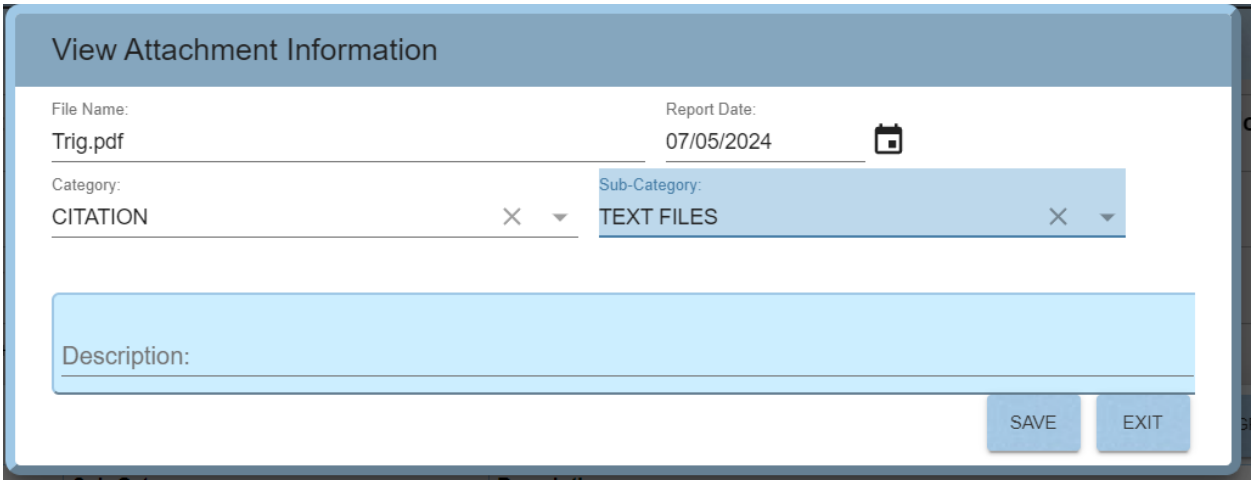
The **Attachments** tab is used to view, download, or add attachments. Double-click a file entry to view the record for the attachment or click on the icon to download the attachment to the computer.



You can add a single attachment at a time or multiple attachments at a time. Just like above with images, you will need the System Tray Installer downloaded to the computer you are using to add multiple attachments at once. See the *Image* tab instructions on the previous few pages for instructions on installing the System Tray Installer.

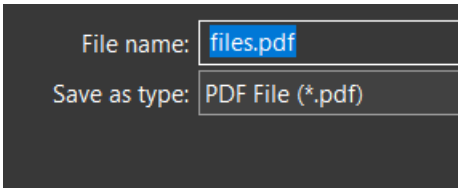
Click **Add Attachment** to add a single attachment or click **Add Attachments** to add multiple attachments at the same time. Choose the attachments from the computer, then add the appropriate category and sub-category for the file.



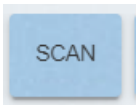


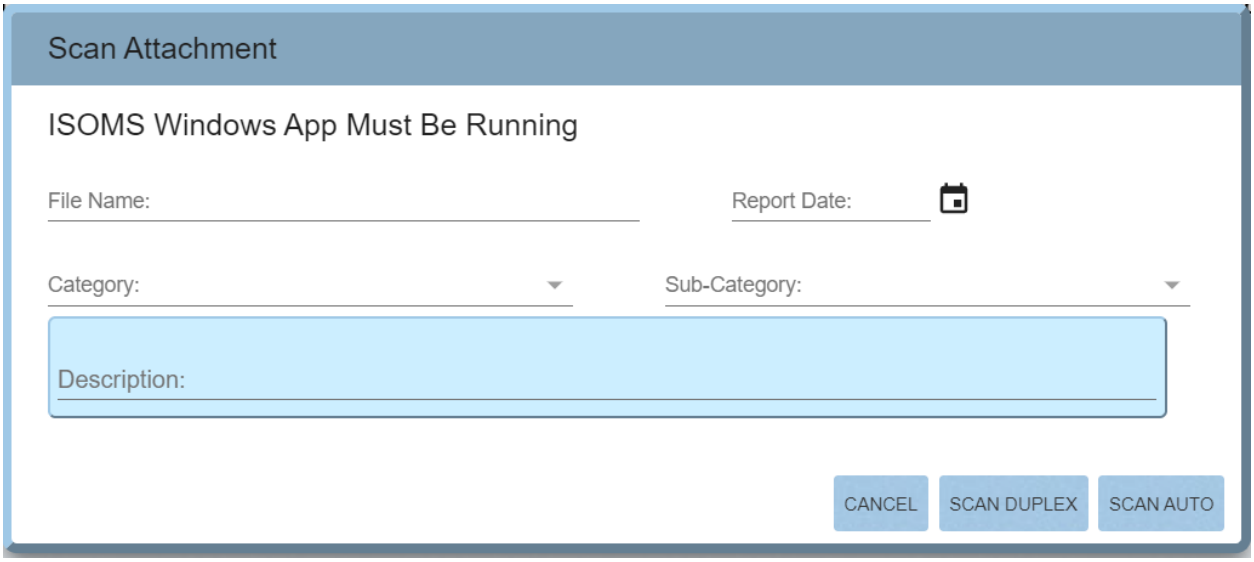
You can also **Download All PDFs** at once by clicking the appropriate button.





If you have the iSOMS Windows App, you can use **Scan** to scan files into the attachments.





Community Service Reports

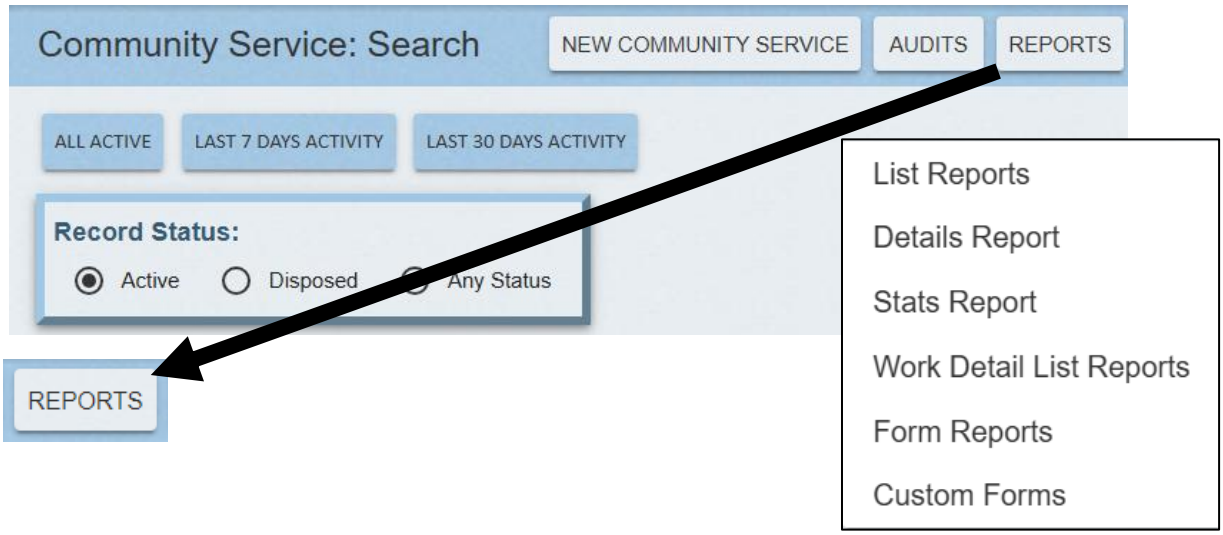
iSOMS has the capability to allow you to print different types of reports for community service records.

To access the reports, begin on the iSOMS home screen. Navigate to:

Corrections → Administrative → Community Service

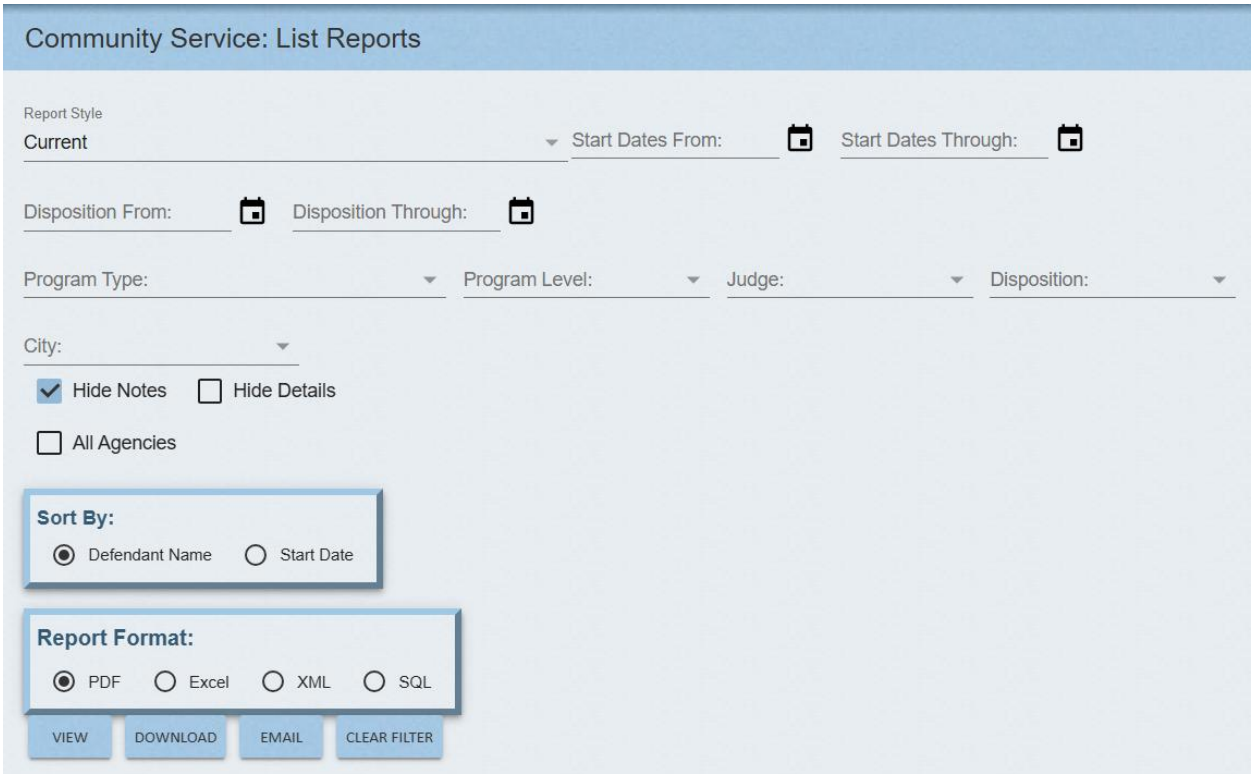


Now click on the **Reports** button in the upper right corner and select the report you wish to run. Different reports are explained over the next set of pages.



List Reports

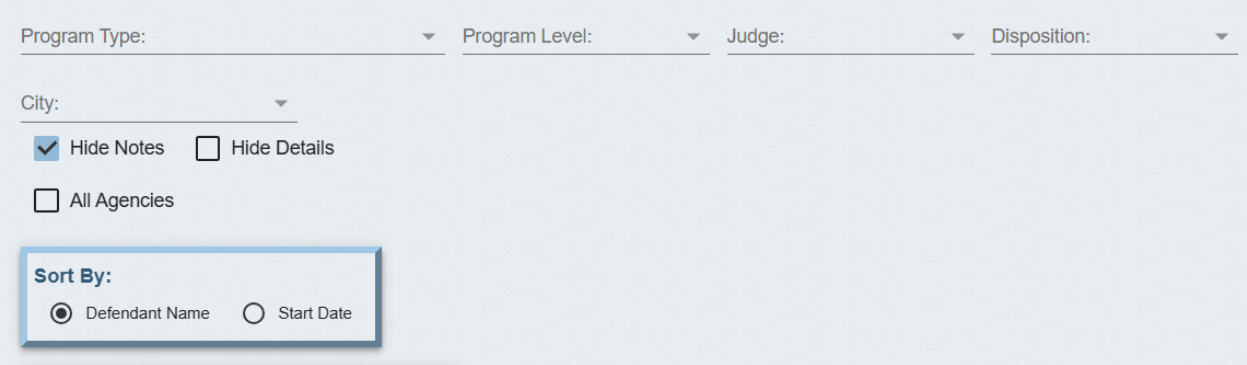
This report displays community service records in iSOMS over a certain date range. In this way you can see an overview of community service over your chosen time period. Add the start dates in **Start Dates From** and **Start Dates Through**, or the disposition dates in **Disposition From** and **Disposition Through**.



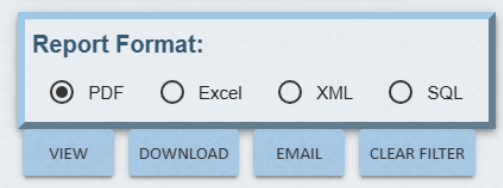
Report Style has many different layout and sorting options, such as *Current, List, Current by City, List by City, Current with Image*, and more. Pick the one most relevant to your desired result.

Current	List
Current With Image	List By City
Current By City	List With Image
Current By Program Type	List By Program Type

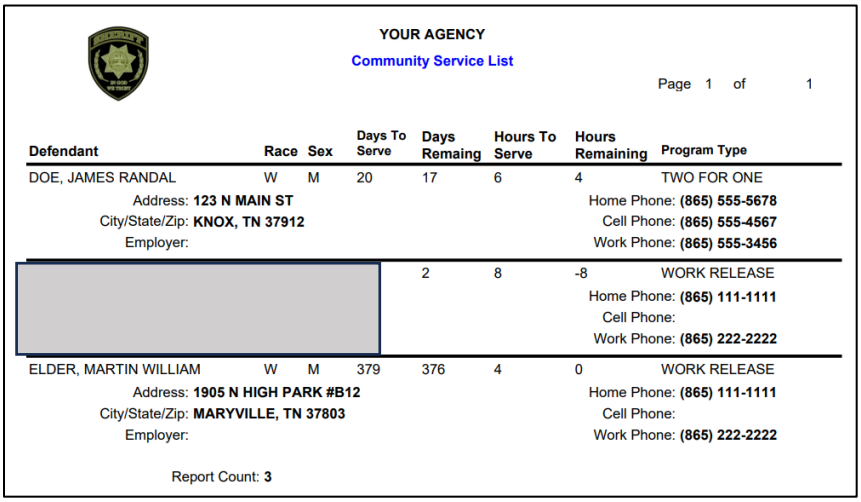
You can add certain filters to reduce the list if desired. Also choose if you would like to hide notes and/or details on the report.



Now, with your chosen parameters, click **View** or **Download** to view the report.



List Report



YOUR AGENCY

Community Service List

Page 1 of 1

Defendant	Race	Sex	Days To Serve	Days Remaing	Hours To Serve	Hours Remaining	Program Type
DOE, JAMES RANDAL	W	M	20	17	6	4	TWO FOR ONE
Address: **123 N MAIN ST**						Home Phone: **(865) 555-5678**	
City/State/Zip: **KNOX, TN 37912**						Cell Phone: **(865) 555-4567**	
Employer:						Work Phone: **(865) 555-3456**	
[redacted]				2	8	-8	WORK RELEASE
						Home Phone: **(865) 111-1111**	
						Cell Phone:	
						Work Phone: **(865) 222-2222**	
ELDER, MARTIN WILLIAM	W	M	379	376	4	0	WORK RELEASE
Address: **1905 N HIGH PARK #B12**						Home Phone: **(865) 111-1111**	
City/State/Zip: **MARYVILLE, TN 37803**						Cell Phone:	
Employer:						Work Phone: **(865) 222-2222**	

Report Count: **3**

Current Report

YOUR AGENCY

Community Service List

Active Records

Page 1 of 1

Defendant	Race	Sex	Days To Serve	Days Remaing	Hours To Serve	Hours Remaining	Program Type
				2	8	-8	WORK RELEASE
						Home Phone: **(865) 111-1111**	
						Cell Phone:	
						Work Phone: **(865) 222-2222**	

Report Count: **1**

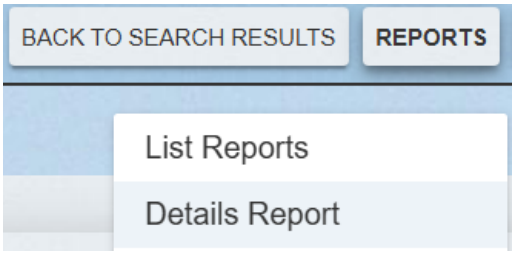
Detail Report

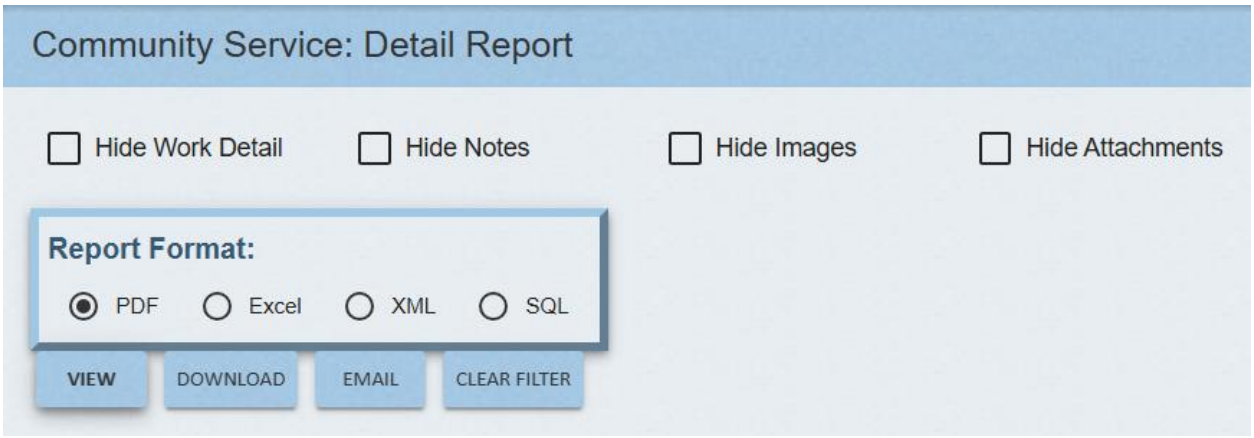
This report displays many details for individual community service records.

First, go to the record you want to make a detail report for and open its record in iSOMS.



Then click **REPORTS → DETAIL REPORT** to open the Detail Report screen.





Choose what you would like included on the report, such as images, work detail, images, or attachments. And with your chosen parameters, click **View** or **Download** to view the report.



YOUR AGENCY

Community Service Details

Community Service Details

Defendant	Start Date	End Date
DOE, JAMES RANDAL	08/27/2025	

Address: **123 N MAIN ST**
City/State/Zip: **MARYVILLE, TN 37803**
DL #:
Email: **FAKEEMAIL@FAKEWEBSITE.COM**

Home Phone: **(865) 555-5678**
Cell Phone: **(865) 555-4567**
Work Phone: **(865) 555-3456**

Program Type: **TWO FOR ONE**
Program Level: **ANYTIME**
Judge: **THOMAS**
Disposition:
Employer:
Occupation:

Arrest Date: **08/26/2025 00:00**
Days To Serve: **20**
Days Worked: **3**
Days Remaining: **17**
Hours To Serve: **6**
Hours Worked: **2**
Hours Remaining: **4**

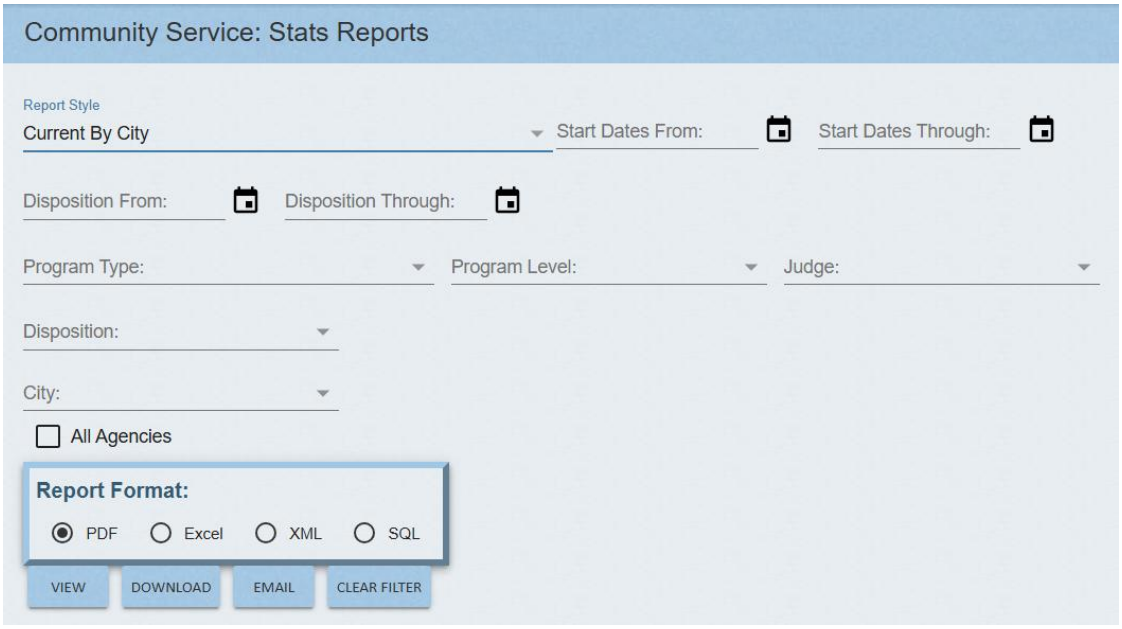
Work History

Start Date	Entry Date	Days Credit	Hours Credit	Receipt #	Fees Paid	Supervisor	Worked For Agency
08/26/2025 12:12	08/26/2025 12:12	1	0		0.00		
Notes:							

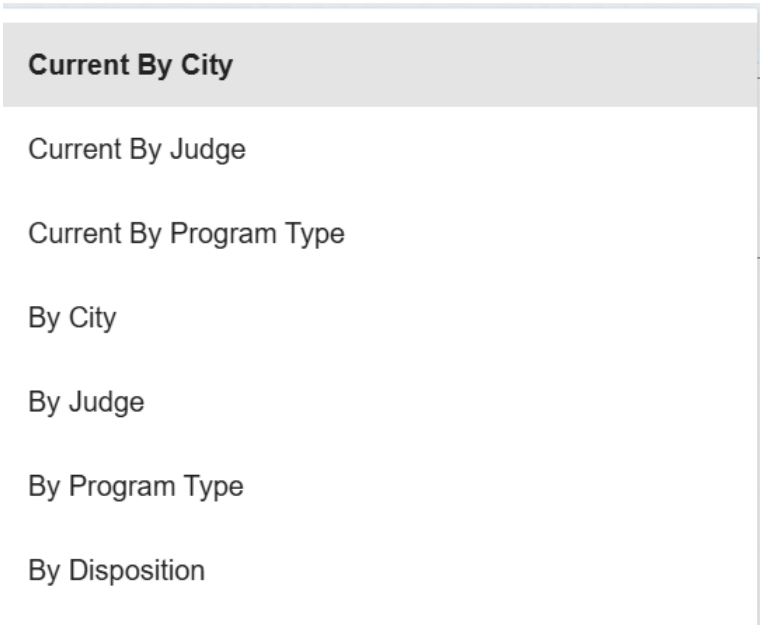
Total Work Entries:

Stat Reports

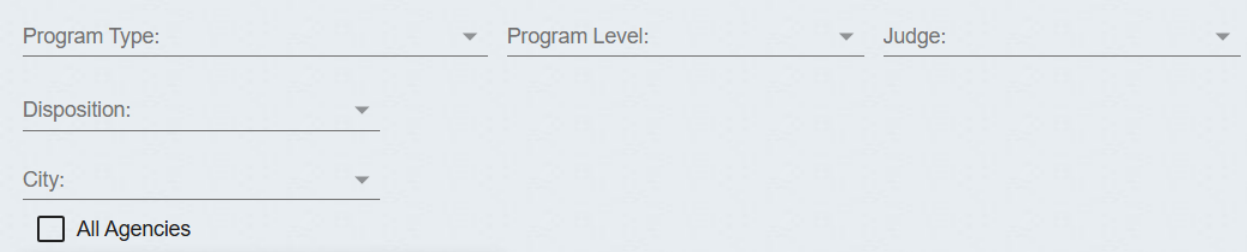
This report displays community service stats in your iSOMS records over a certain date range. In this way you can see statistics for your chosen variable over a certain period. Add the start dates in **Start Dates From** and **Start Dates Through**, or the disposition dates in **Disposition From** and **Disposition Through**.



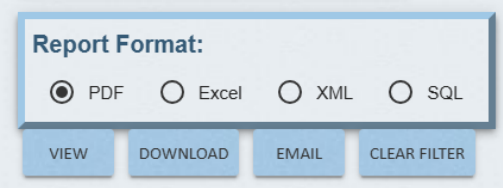
Report Style is where you pick which stat to report on, such as *Current by City, By Judge, By Program Type, By Disposition*, and more. Pick the one most relevant to your desired result.



You can add certain filters to reduce the list if desired.



Now, with your chosen parameters, click **View** or **Download** to view the report.



YOUR AGENCY

Community Service Stats - By Person City

Page 1 of 1

City	Count	% To Total
KNOX	1	33.3333333333
MARYVILLE	1	33.3333333333
PHILADELPHIA	1	33.3333333333

Report Count: **3**

YOUR AGENCY

Community Service Stats - By Judge

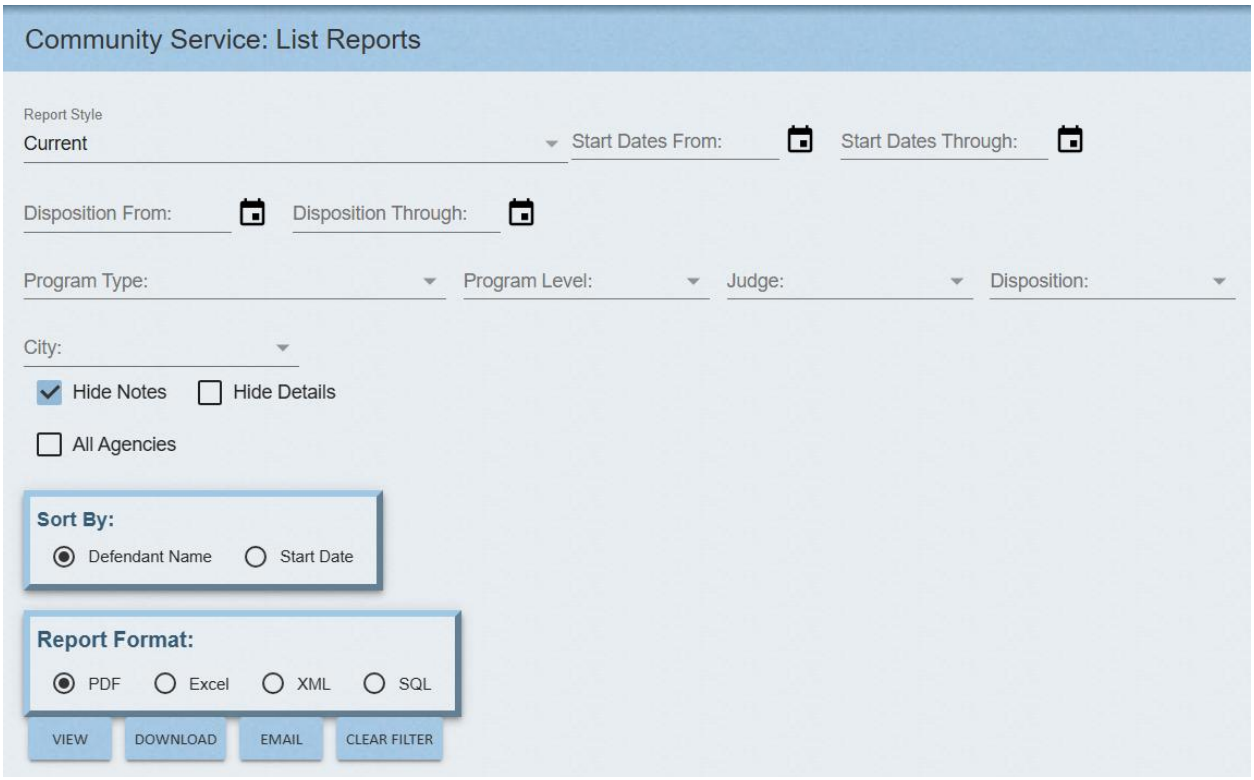
Page 1 of 1

Judge	Count	% To Total
AKINS	1	33.3333333333
THOMAS	2	66.6666666666

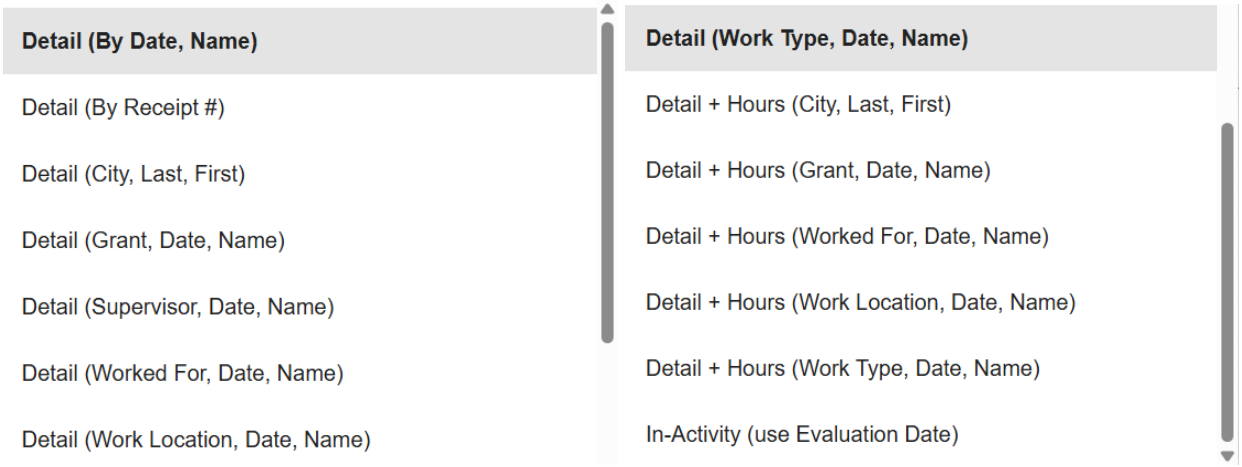
Report Count: **3**

Work Detail List Reports

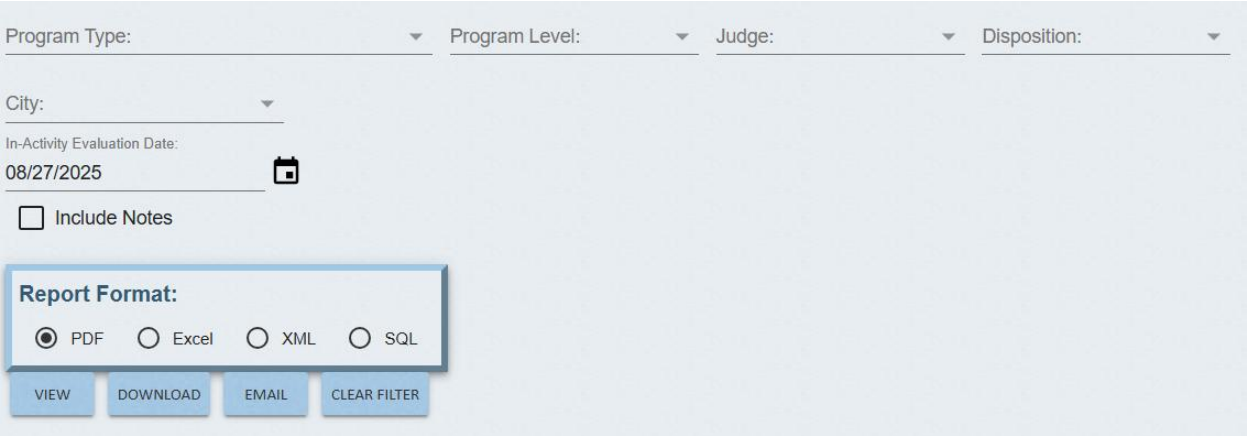
This report displays work history entries from the **Work History** tabs in iSOMS over a certain date range. In this way you can see an overview of work history over your chosen time period. Add the start dates in **Start Dates From** and **Start Dates Through**.



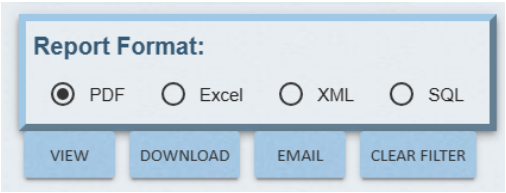
Report Style has many different layout and sorting options, based on the details you'd like on the report. Pick the one most relevant to your desired result.



You can add certain filters to reduce the list if desired. Also choose if you would like to include notes on the report.



Now, with your chosen parameters, click **View** or **Download** to view the report.



Continued on the next page

YOUR AGENCY

Community Service Work Detail List (By Work Type)

Start Dates From 09/01/2015 Through 08/27/2025

Work Date	Last, First name	Cases	Receipt	Amount	Pay Type
04/27/2022		DK-1234		0.00	
04/27/2022		DK-1234		5.00	
04/27/2022		DK-1234		0.00	
04/27/2022		DK-1234		0.00	
04/27/2022		DK-1234		0.00	
08/26/2025	DOE, JAMES RANDAL			0.00	

Count: **6** Total: **5.00**

DIRT WORK RIVER

Work Date	Last, First name	Cases	Receipt	Amount	Pay Type
11/01/2017		DK-1234	8400	50.00	CA
03/19/2022		DK-1234		0.00	

Count: **2** Total: **50.00**

MAINTENANCE-SCHOOL

Work Date	Last, First name	Cases	Receipt	Amount	Pay Type
11/05/2017	ELDER, MARTIN WILLIAM	THE CASES	8490	30.00	MO

Count: **1** Total: **30.00**

MOWING

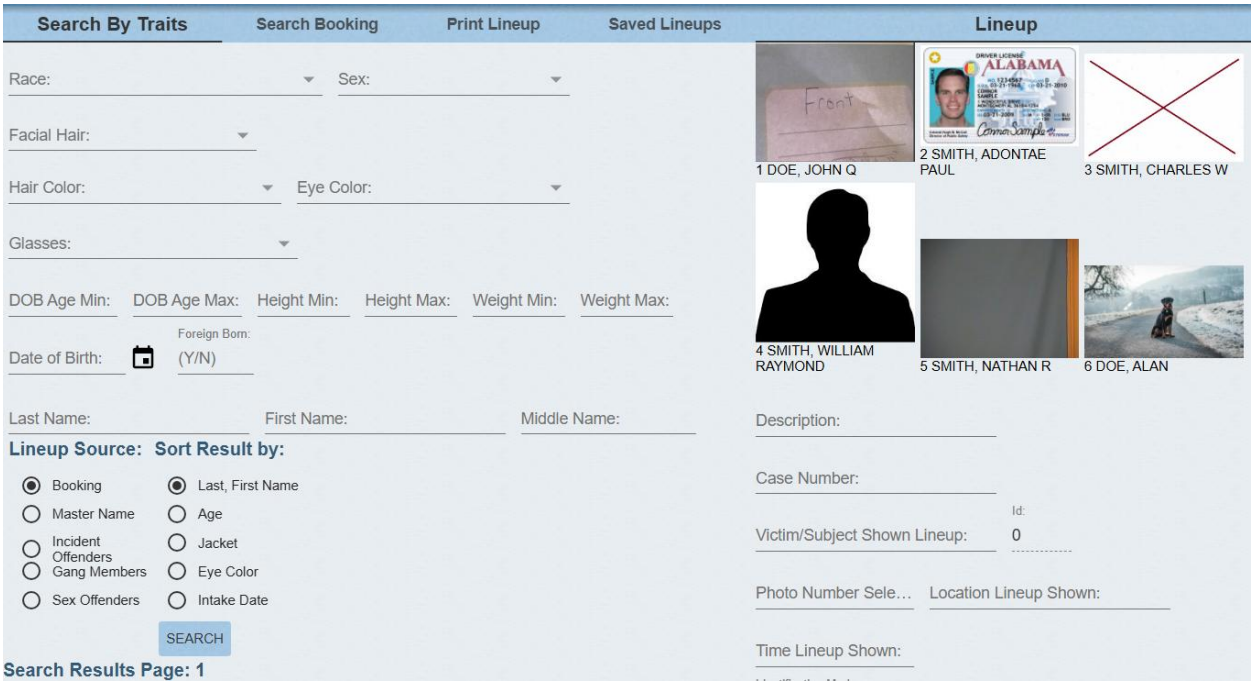
Work Date	Last, First name	Cases	Receipt	Amount	Pay Type
08/26/2025		DK-1234	12345	0.00	CK

Count: **1** Total: **0.00**

Report Count: **10** Total: **1.00**

Lineup

The **Lineup** module lets you search inmates to create lineup lists. You can search by inmate traits or by information. You also have the ability to save the lineup lists, print the lineup lists, and add a few notes and information on lineups shown to a subject/victim. This section explains how to create a lineup list, how to save a lineup list, and how to print out the information.



Creating and Editing New Lineups

To open the *Lineup* module, begin on the iSOMS home screen.

Navigate to:

Corrections → Administrative → Lineup



This will open the **Lineup** screen, where you can create, edit, save, and print lineups.

Searching for People to Add to Lineups

You can add up to 6 people to the lineup by using the two search headings: **Search by Traits** and **Search Booking**. All you need to do is add filters for your searches, click the photo in the search results, and the person will be put into the lineup record.

First, choose to search by **Traits** or by **Booking.**

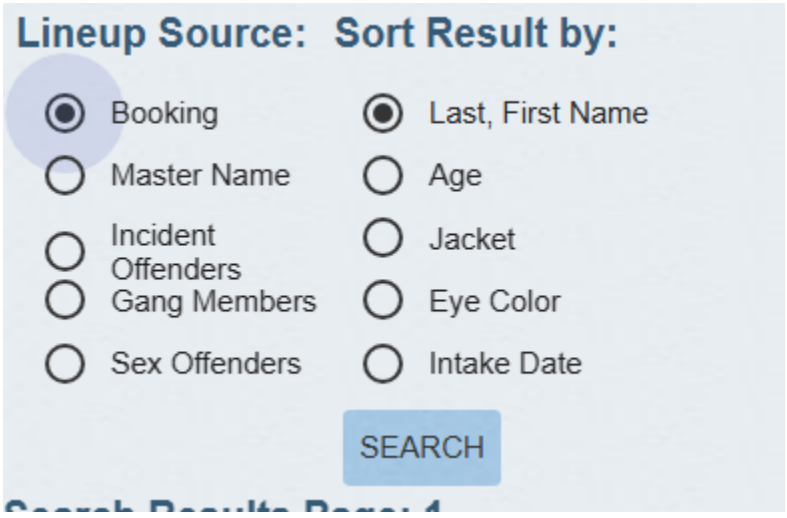


If you **Search by Traits**, you can search the following parameters:

Race	Eye Color	Weight
Sex	Glasses	Foreign Born (Y / N)
Facial Hair	DOB / Age	Name
Hair Color	Height	



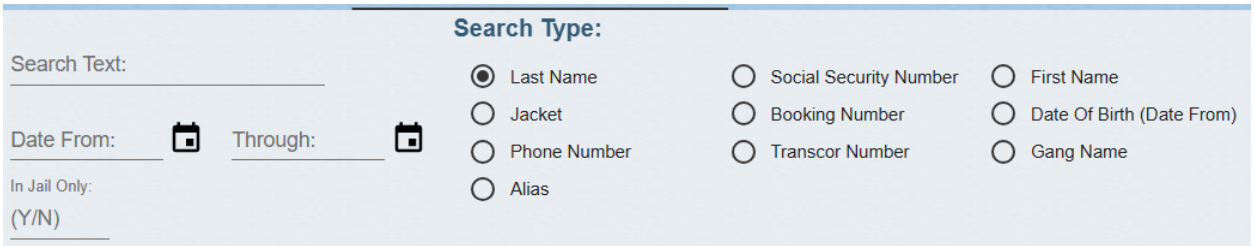
You can also choose where the records are sourced from. For example, you can search people from Booking, Master Name, Incident Offenders, Gang Members, or Sex Offenders. Then pick how to sort the list. (*Name, Age, Jacket #, Eye Color, Intake Date)*



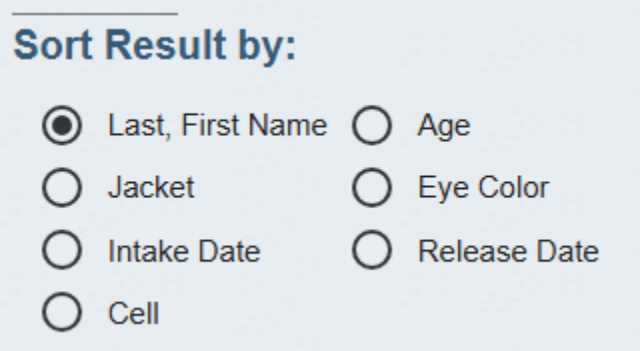
If you **Search Booking**, you can search the following parameters:

Last Name	Booking Number	Gang Name
First Name	DOB	Alias
Jacket Number	Phone Number	
Social Security Number	Transcor Number	

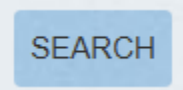
Select the parameter you want to search, and then add the keyword in **Search Text.** You can limit the search by a date range and if the search should be **In Jail Only** (Y/N).



Now pick how to sort the list. (*Name, Age, Jacket #, Eye Color, Intake Date, Release Date, Cell)*

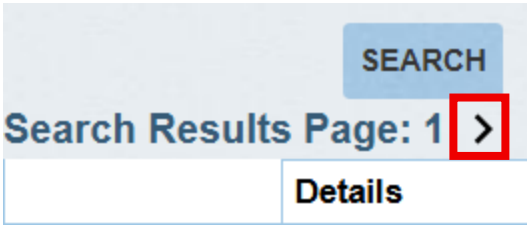


Once you have decided on your parameters, click **Search** and the results will be displayed:





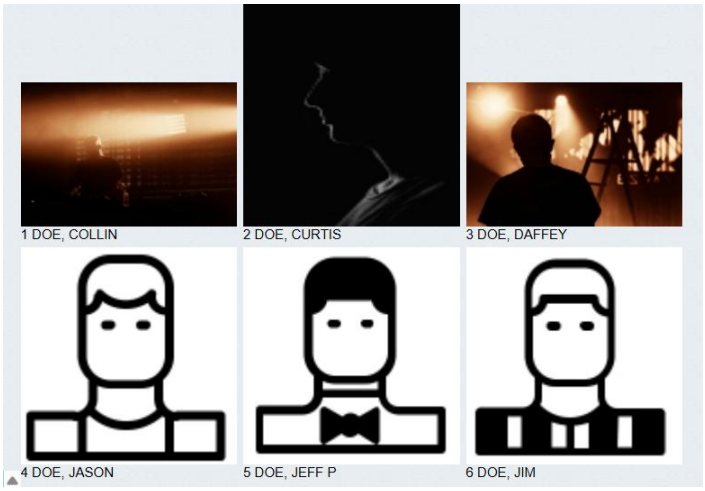
If your search has more than one page, just click the arrow > to go through pages.



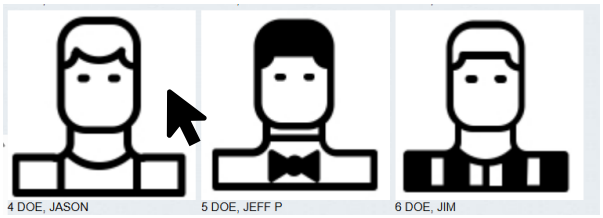
Adding and Removing People in the Lineup

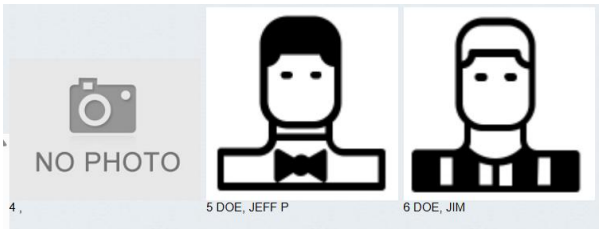
To select a person for the lineup, click their picture and they will be added to the lineup on the right side of the screen.





To remove a person from the lineup, just click their picture in the lineup list to remove them.

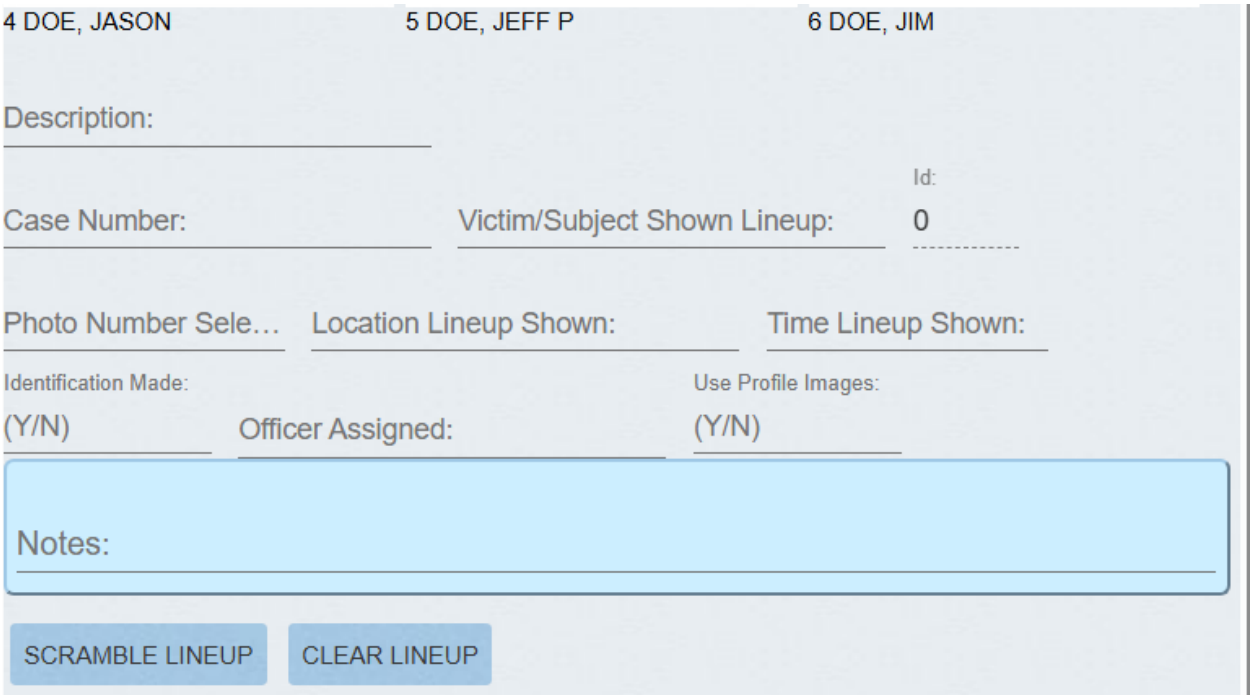


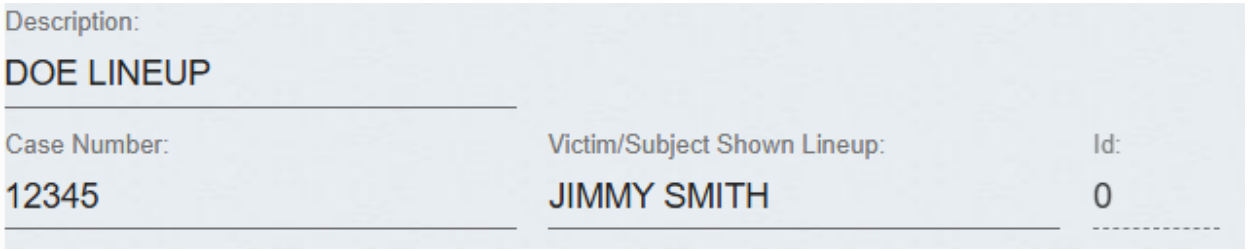


Adding Details to a Lineup

Once you have selected the individuals to be in the lineup, you can add details to reference later.

Underneath the photos, there are several fields where you can add information as desired.





Description can be used to name the lineup entry.

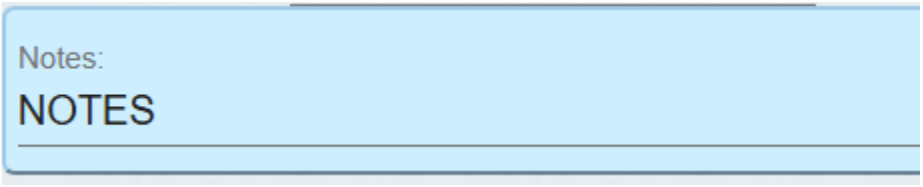
Case Number can be used to reference the case this lineup relates to.

Victim / Subject Shown Lineup lets you record who is being shown this lineup.



Record the individual chosen in **Photo Number Selected.** You can record where and when the lineup was done in **Location Lineup Shown** and **Time Lineup Shown**.

If an identification was made, record it in **Identification Made,** add the **Officer Assigned**, and whether or not you should use the profile images.



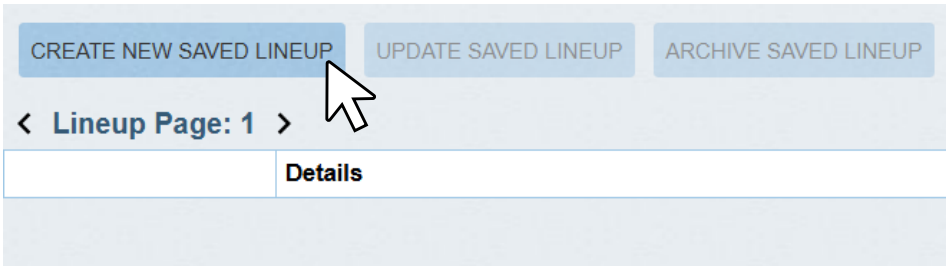
Add any **Notes** in the Notes box.

Saving and Deleting Lineups

To save your lineup, just click the **Saved Lineups** heading button:

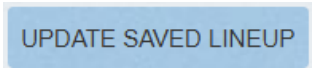


Then, *after* you have created your lineup, click **Create New Saved Lineup** to save the photos and details to iSOMS.

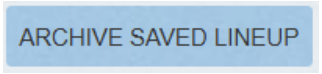




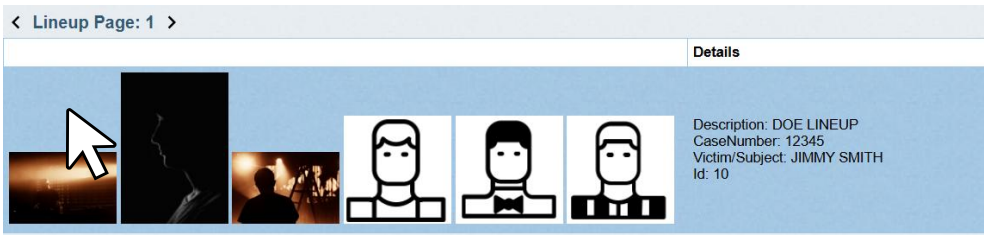
If you change the lineup and want to override the previous lineup, click **Update Saved Lineup** to save the changes.



If you want to delete the current lineup, click **Archive Saved Lineup** and it will be removed.



If you want to load a lineup, just click it from the list to load a previously saved lineup.

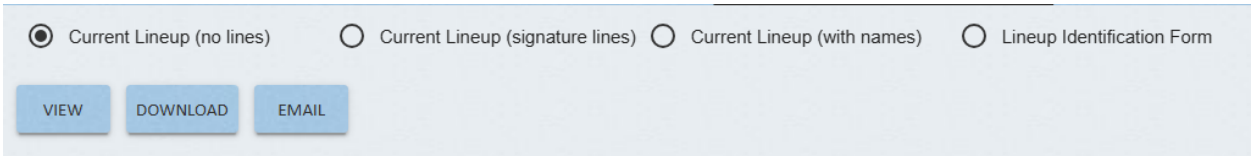


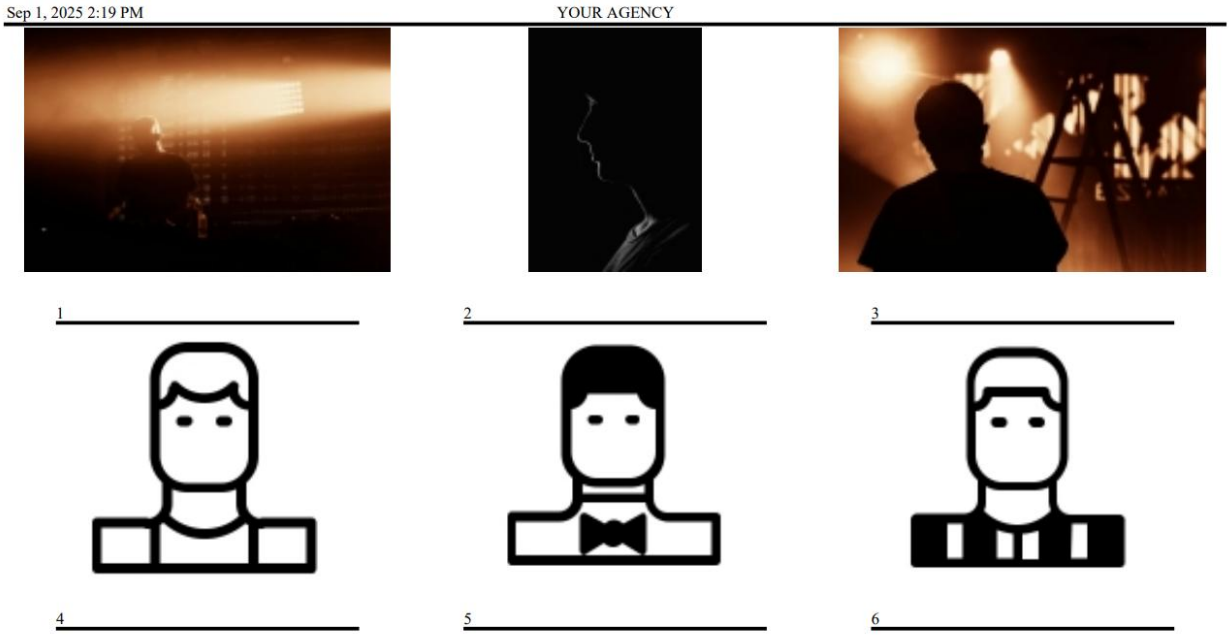
Printing Lineups

Once you have created or loaded a lineup, you can print it by clicking the **Print Lineup** heading:



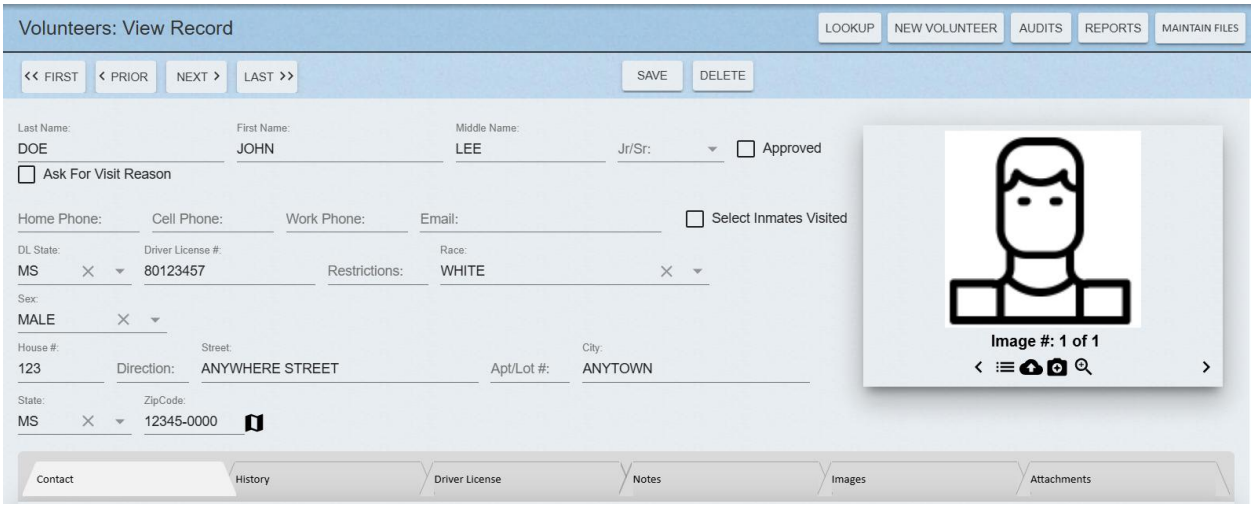
Now select the lineup style you want to print, such as with or without lines. Then **View, Download,** or **Email** the document.





Volunteers

The **Volunteers** module allows you to record volunteers for your agency and their visits. You can keep track of their identifying information, approval / suspension status, contact info, etc. This section will explain searching volunteer records, adding new volunteers based on Master Name, filling out a volunteer record, and running reports on existing volunteer records.



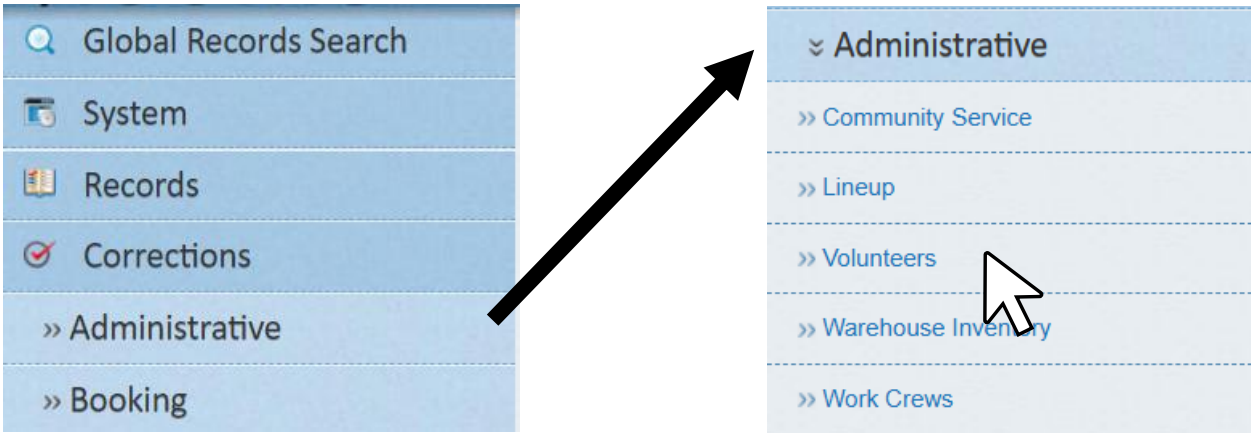
The first part of this section explains searches. If you need explanations on an already existing record, see the *Filling Out a Volunteer Record* to get more information on the different fields and tabs available.

Searching for Existing Volunteer Records

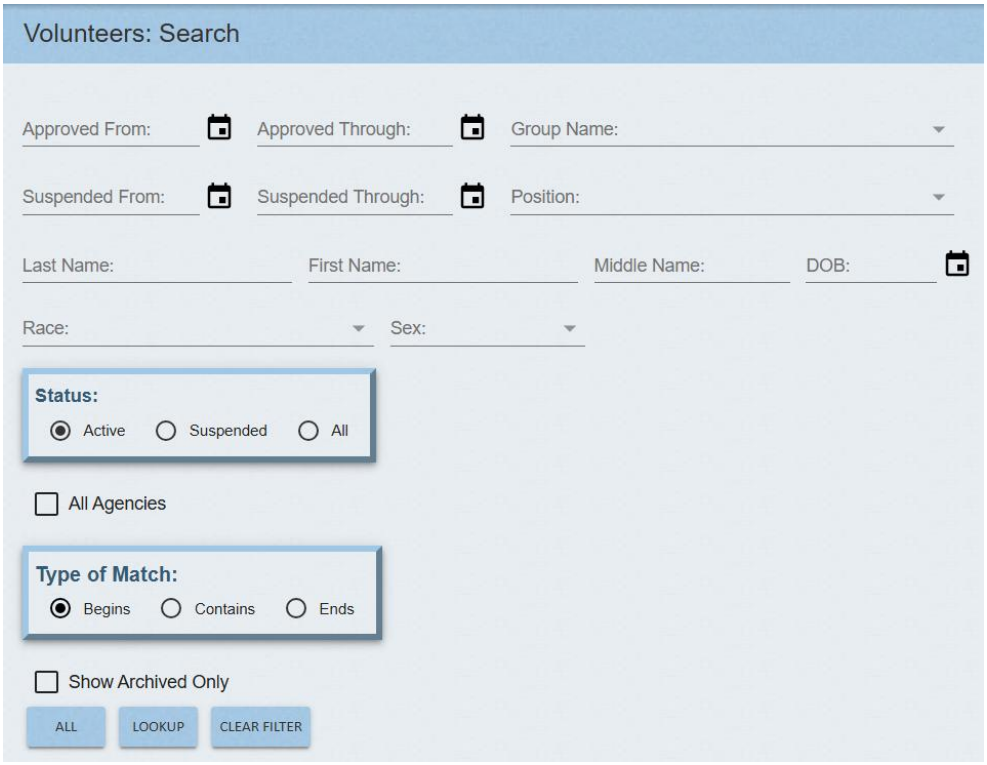
To search existing records, begin on the iSOMS home screen.

Navigate to:

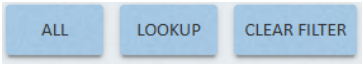
Corrections → Administrative → Volunteers



This will open the **Volunteers: Search** screen. Here you can search and filter for different volunteer records. You can enter information in the fields to do *standard searches* or hit **ALL** to see every volunteer record.

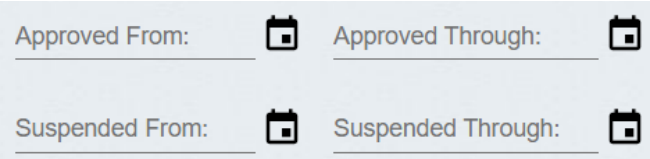


Standard Searches

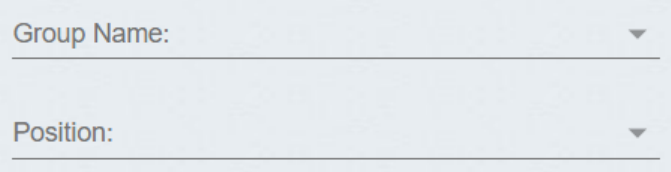


Various fields are available to filter searches. Fill in the fields to narrow the search and click **Lookup** at the top or bottom of the page to perform the search. If you need to start over, simply click **Clear Filter** to remove all search field entries. You can also hit **ALL** to see every record in iSOMS.

Field Explanations

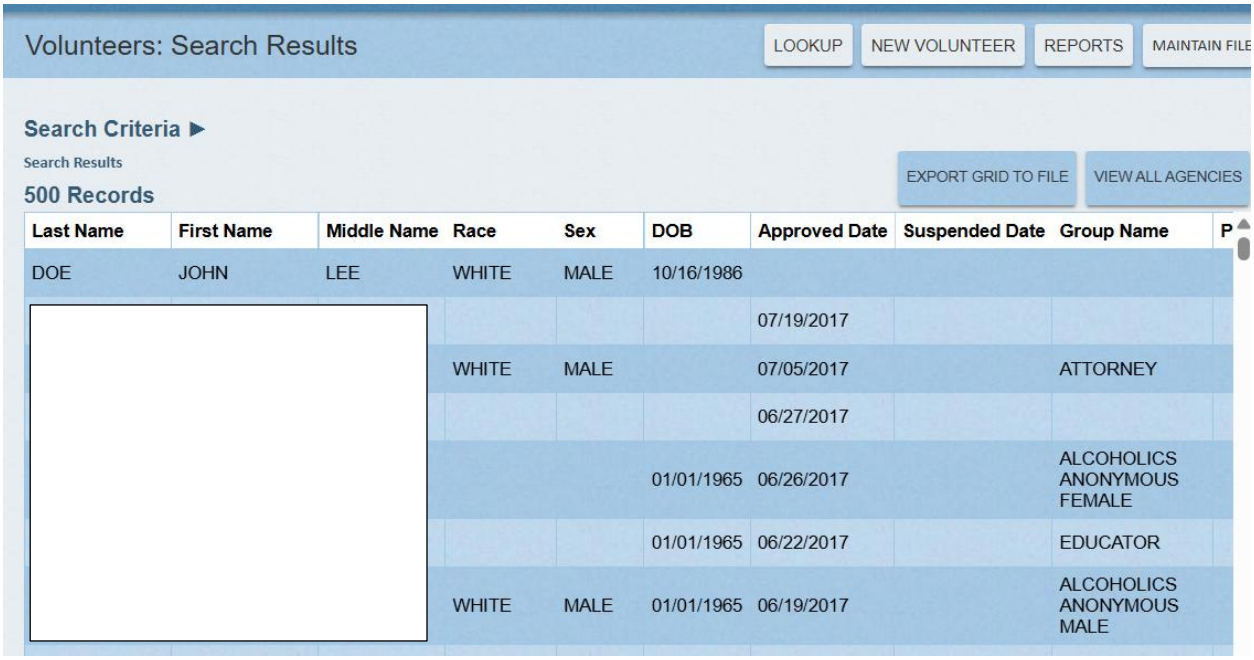


These fields let you search based on approval / suspension date.



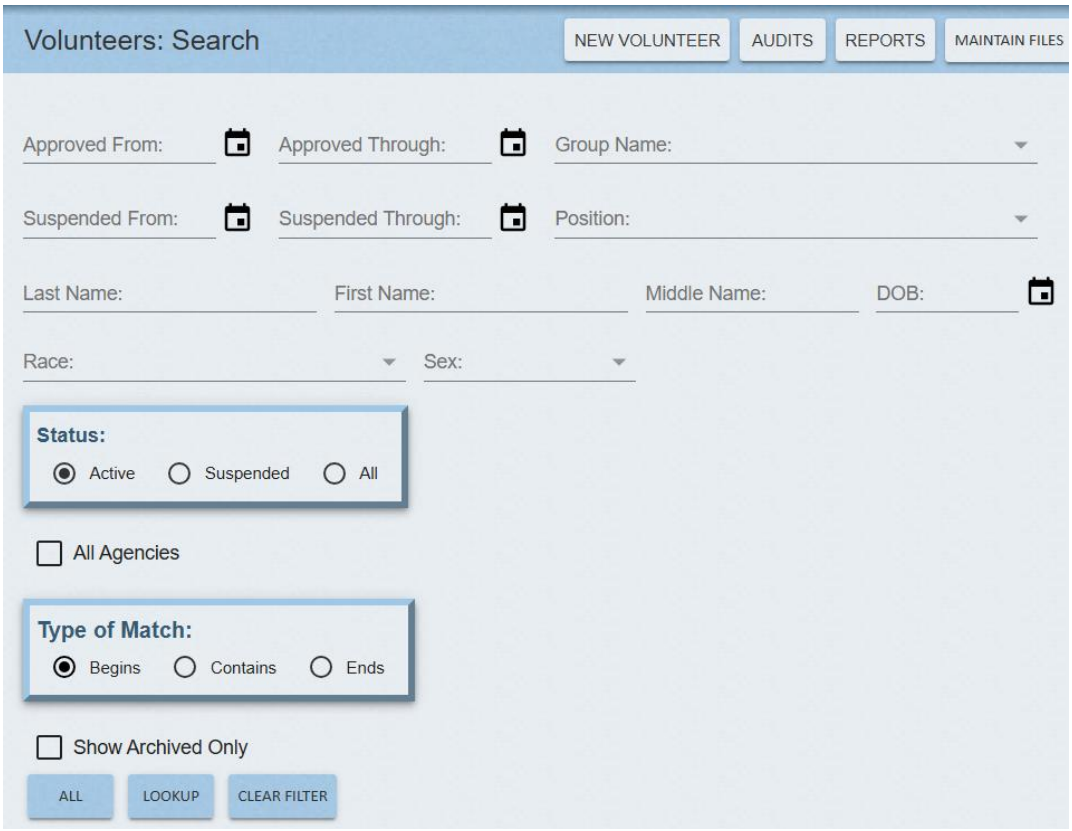
You can sort volunteers by their **Group Name** (such as what organization or church they are from) and/or **Position** (like teacher, minister, etc.).

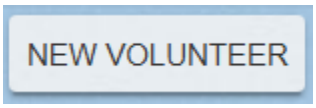
As mentioned above, when you have finished with your search parameters, click **Lookup** to perform your search. Double click on the desired entry to view, edit, or approve the report.



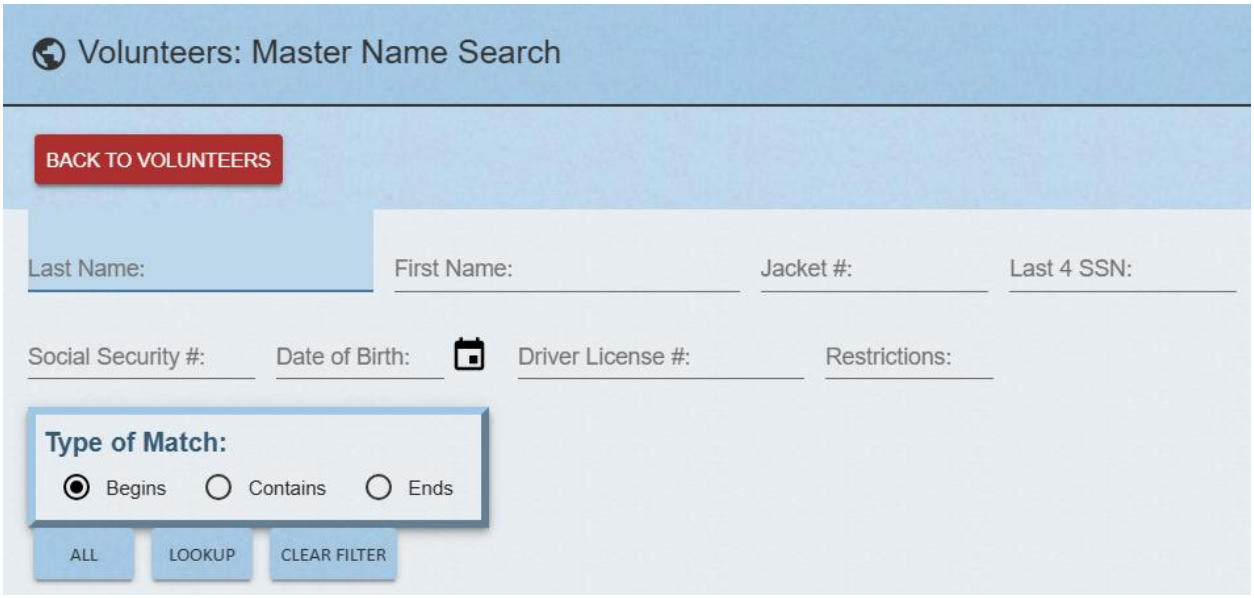
Creating a New Volunteer Record

To create a new volunteer record, click **New Volunteer** in the upper right corner of the Volunteers search screen:



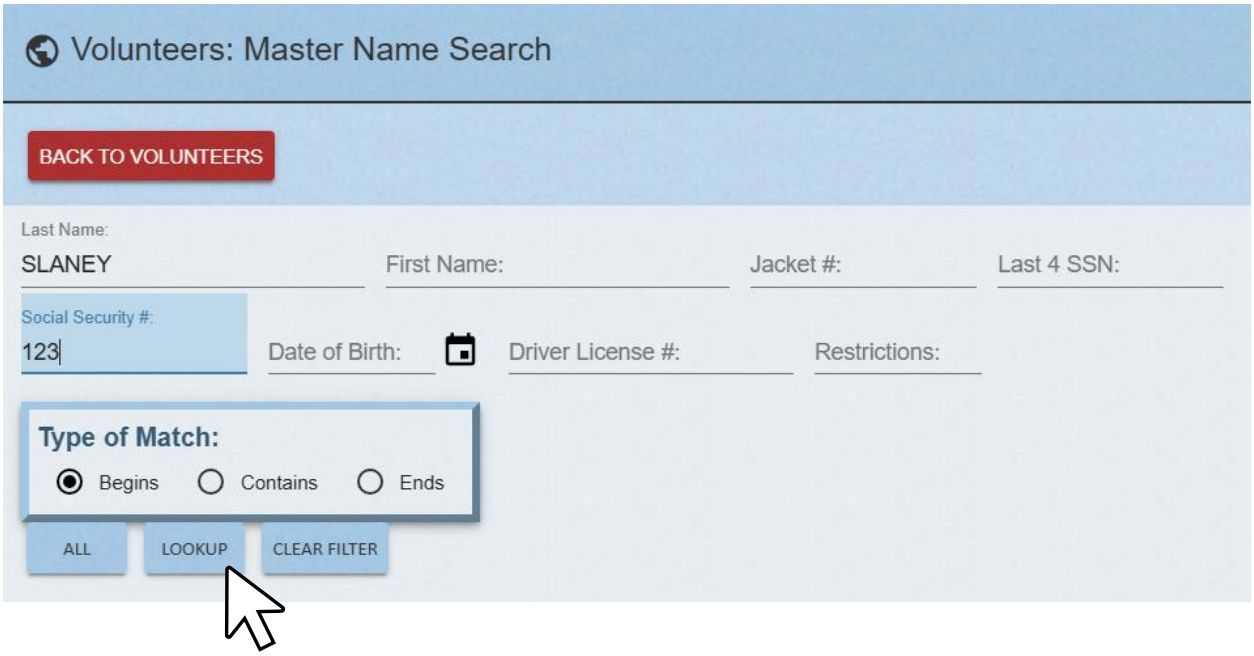


You will make an Volunteer record using the Master Name entry of the individual involved.

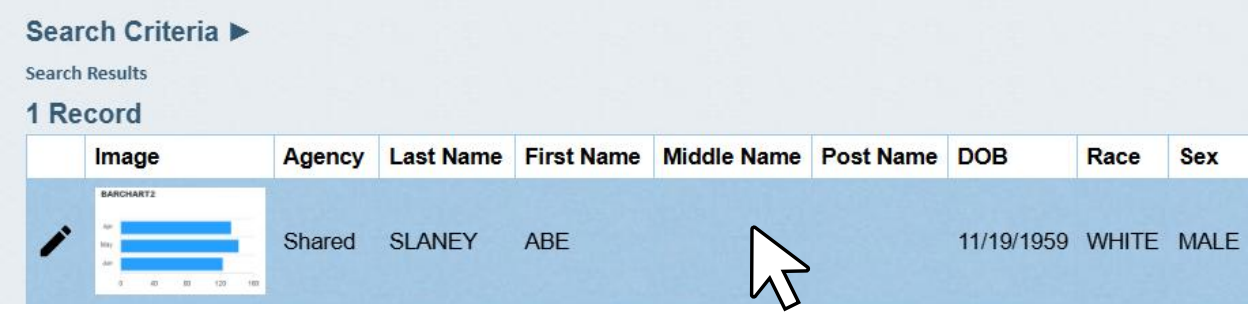


Search for the person for which you are creating a volunteer record, using *at least* two identifying pieces of information. You want to verify that the individual matches with the Master Name. If you do not have the person in your Master Names, create a new one using **New Master Name.**

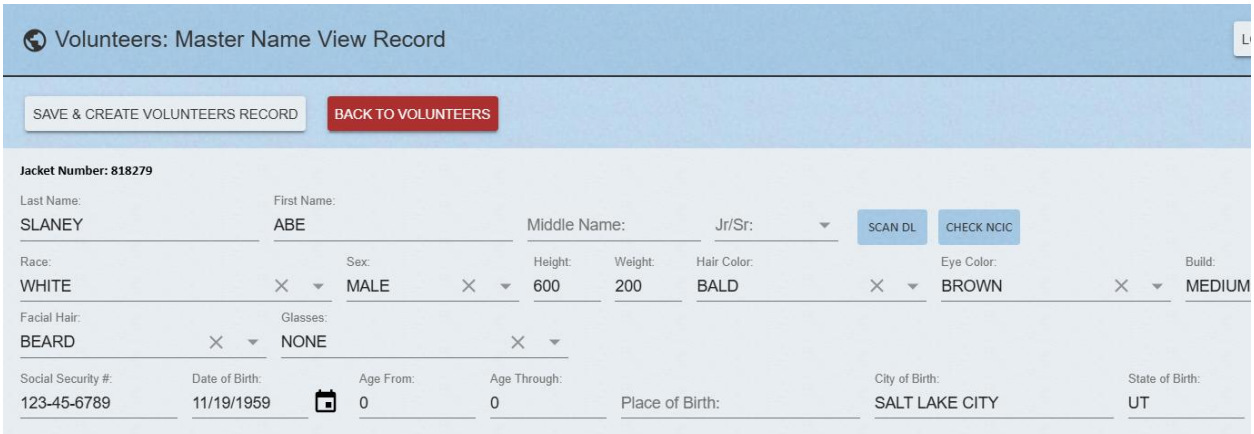
Click **LOOKUP** when you have the information you need.



Double-click the appropriate Master Name from the results to open their record.



Verify the Master Name information is filled out correctly. If you don't have the person in the Master Names, you should create a new one. (See *Creating A New Master Name* on page 52.)

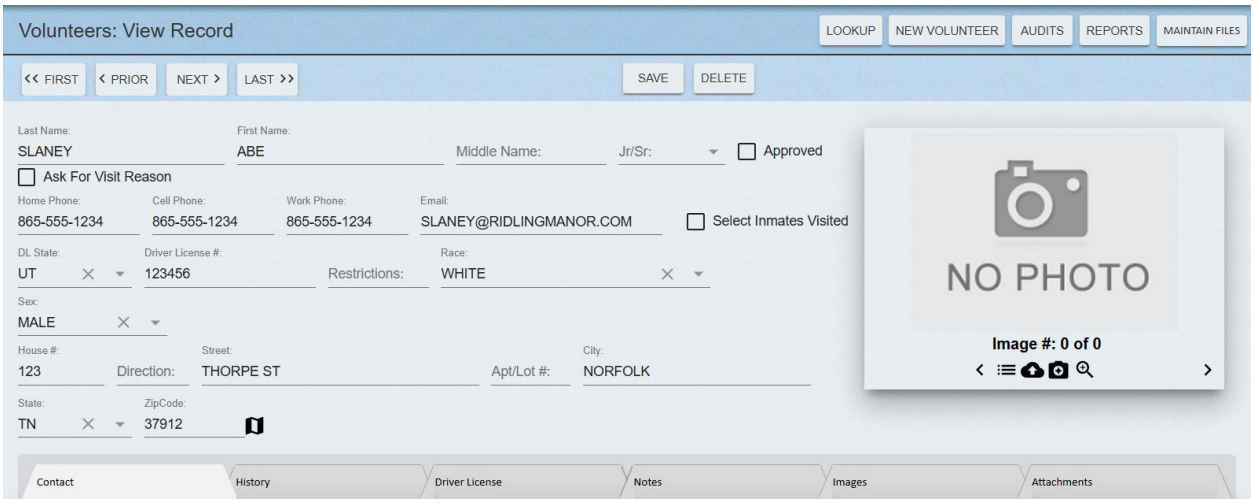


Click **Save & Create Volunteers Record** when you are finished.



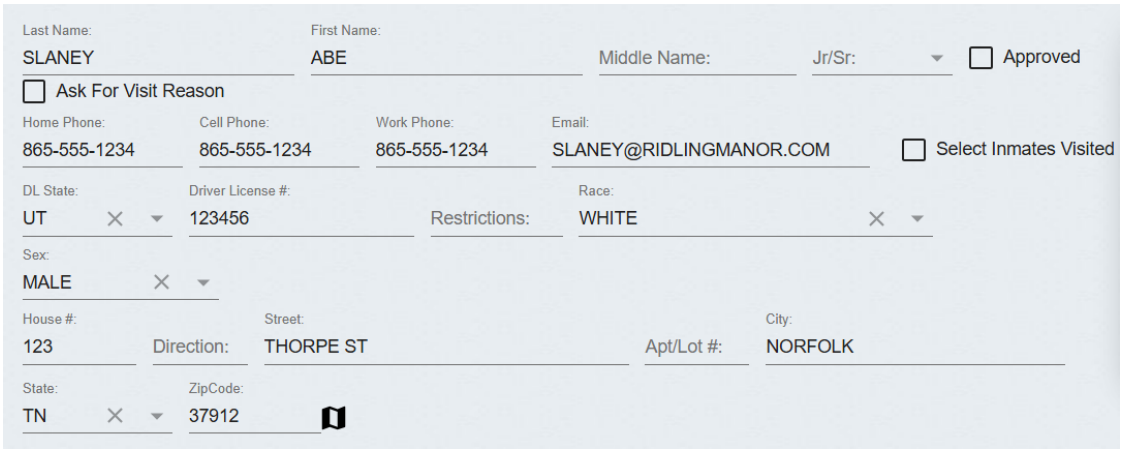
This will create and open the new record.



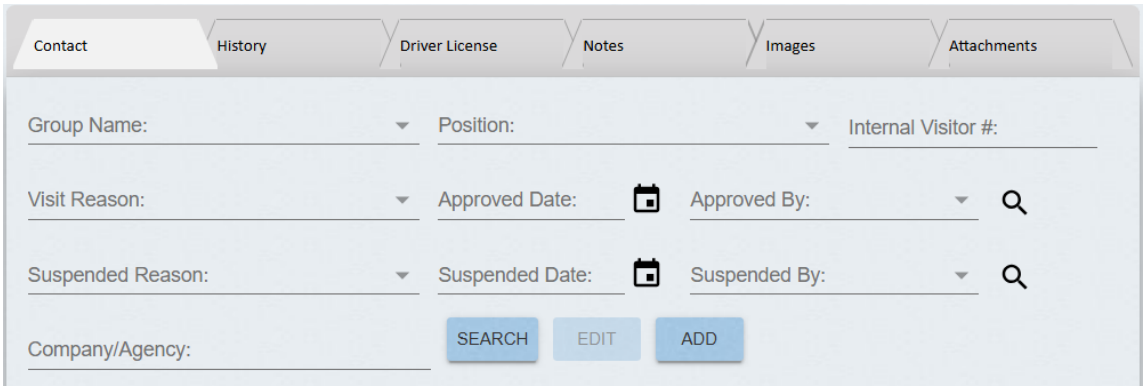


There are two primary sections of the report:

1. The *fields* in the upper part of the screen. These record details about the individual, their address, identifying info, and contact information.

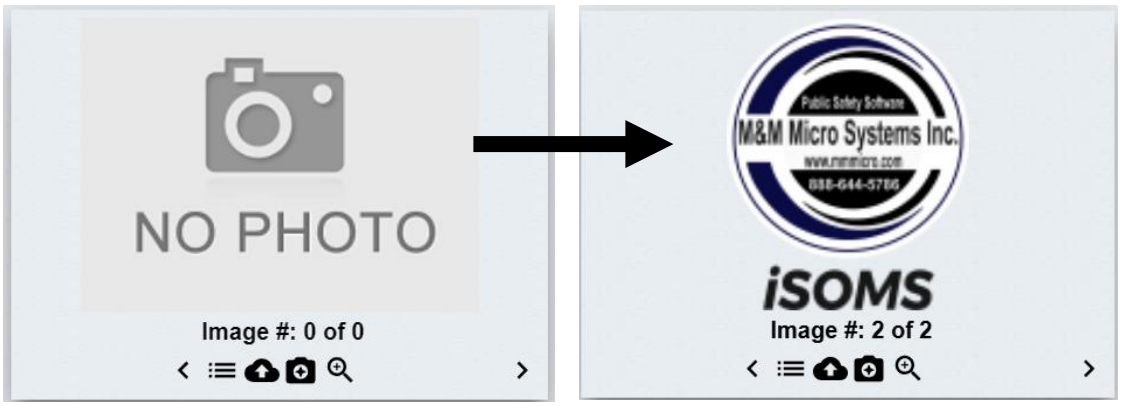


2. The *tabs* record information about the person, their visit history, notes, images, and attachments.



Fill out the fields still unfilled from the Master Name at the top of the screen, and then make sure to fill out the following tabs as appropriate: **Contact, History,** and **Driver License.** If other notes or attachments are needed, you can add them to **Notes, Images,** and **Attachments**. This process is covered in detail in the next section, *Filling Out a Volunteer Record.*

If you would like to add an image of the individual, you can click **Upload Image ( ) or Take New Photo ( )** on the right. Select or take the image and it will be added.



Remember to hit **Save** at the top of the screen often as you fill out the record to avoid losing information.

***Save** is located at the top of the screen.*

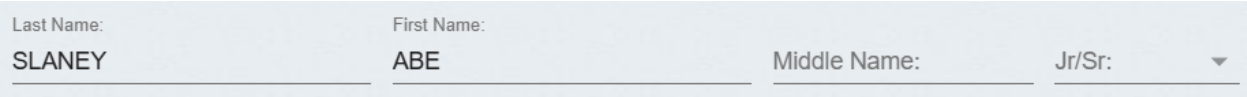


Filling Out a Volunteer Record – Fields

This section explains in detail the different fields and tabs for a volunteer record. The top section of the report with fields should always be filled out when relevant information is available, and the tabs should be filled out as needed.

Most of these fields will be filled out automatically from the Master Name. If a given field is not being filled in, it likely is not filled in the Master Name.

Fields

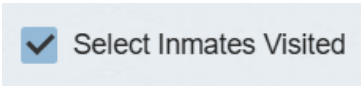


These fields relate to the name of the individual. You will also notice two checkboxes, **Approved** and **Ask for Visit Reason.** *Approved* designates the volunteers is pre-approved for visits, while *Ask for Visit Reason* indicates the volunteer should be asked why they have come for a visit.





These fields relate to the phone, identifying info, and address of the individual. You will also see a checkbox, **Select Inmates Visited**, which indicates this visitor only visits certain inmates.



Remember to hit **Save** at the top of the screen often as you fill out the record to avoid losing information.

***Save** is located at the top of the screen.*



Filling Out a Volunteer Record – Tabs

Summary

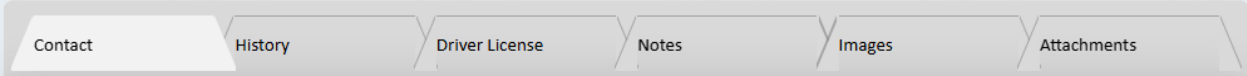
Fill out the tabs below the fields as needed.

The **Contact** tab contains information about the individual and the organization they are from, as well as approval or suspension details.

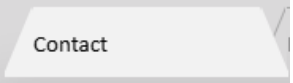
History lets you log instances of visits and details about them.

Driver License lets you use the driver's license scanner to scan the individual's driver's license.

Notes, **Images**, and **Attachments** tabs are available if you need to take additional notes or upload images and documents.



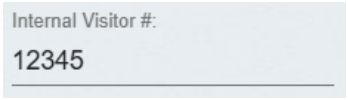
Contact Tab



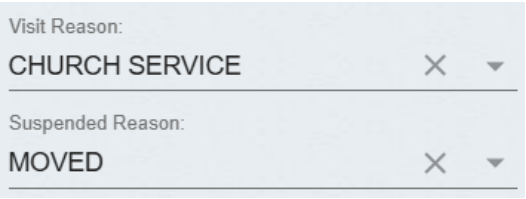
The **Contact** tab contains information on the volunteer, such as their group name, position, visit reason, approval, suspension, and organization. Fill out this tab when you first create the entry, and then add additional details as needed.



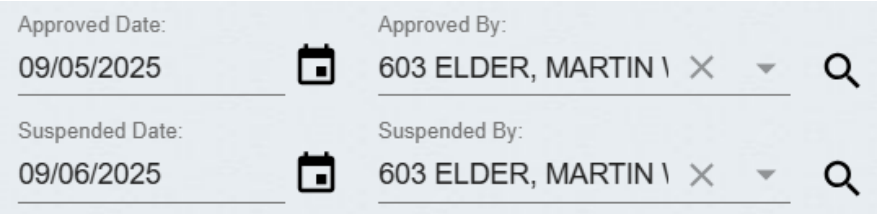
First, add the **Group Name** for the group the person is volunteering with. If they have a position at your agency as a volunteer, such as minister or teacher, add that under **Position.** (If you need additional options, add them via Maintain Files. See *Appendix B: Maintain Files Procedure* on page 726 for more information.)



If you have an **Internal Visitor Number** system, add that number here.



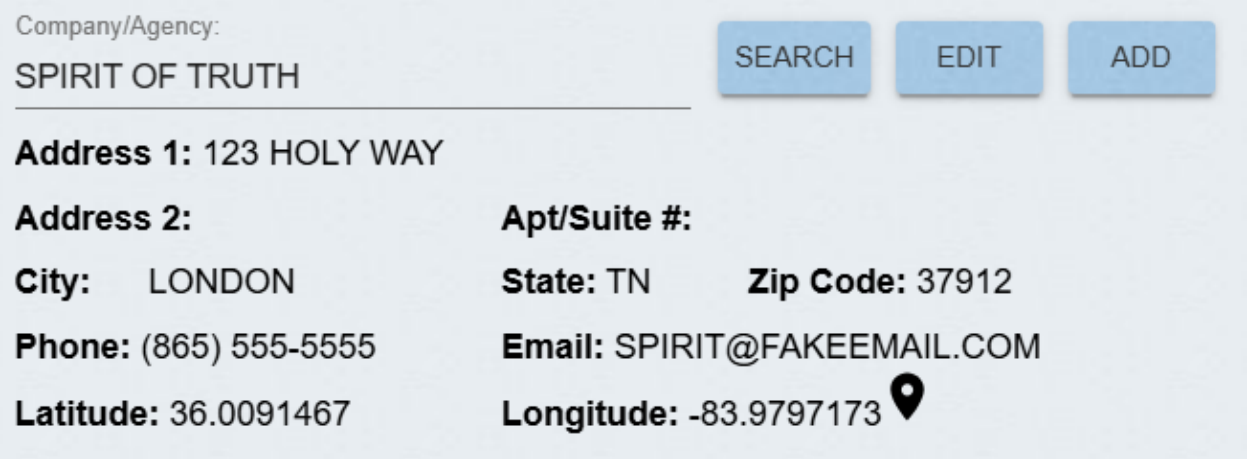
You can record the reason the volunteer usually comes in **Visit Reason** or the reason they have been suspended in **Suspended Reason**.



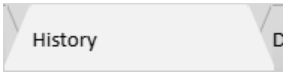
Approved Date and **Suspended Date** can be added here, along with the employee who approved / suspended the volunteer in **Approved By / Suspended By.**

Continued on the next page

The **Company/Agency** field keeps information about the person's organization. If you already have the business / organization in your records, simply type the name (such as **SPIRIT OF TRUTH**) and it will appear automatically. If you don't have the organization in iSOMS or for more information on inputting new organizations into iSOMS for quick reference later, see *Appendix C, Business / Organization Records* on page 728.

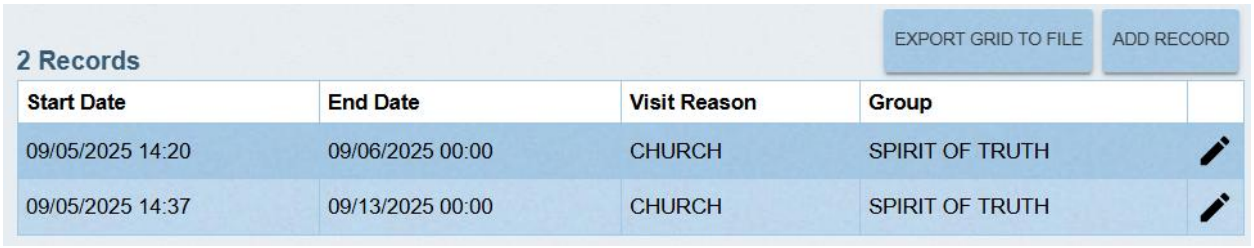


History Tab



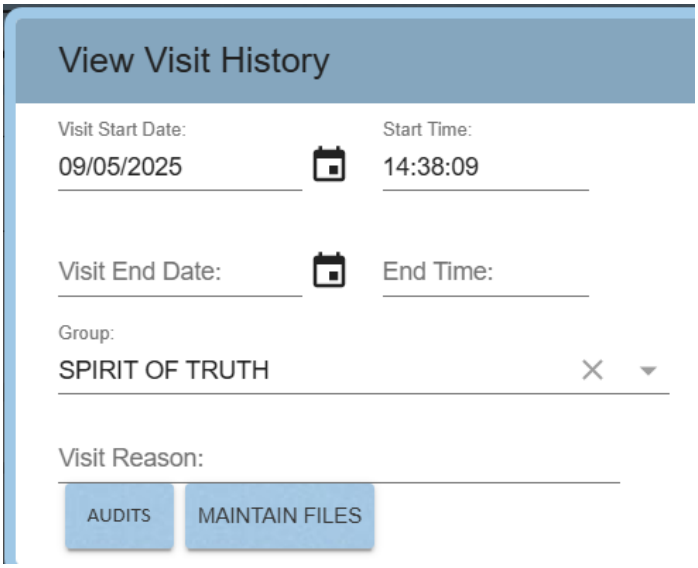
The **History** tab lets you record the visit history of the volunteer.

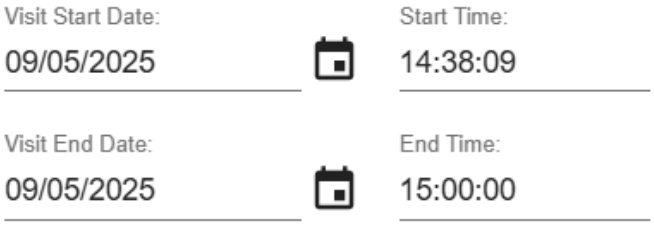
To view, edit, or delete a current entry, double-click an entry from the table.



In order to add a new entry, click the **Add Record** button. Confirm you wish to add a new entry, and then fill in the details.







First, add or edit the **Visit Start Date** and **Time**, then add the **End Date** and **Time** for the visit.

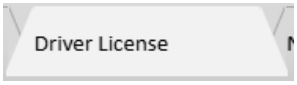


If the **Group** is different than the volunteer's normal group, you can add or change it here.

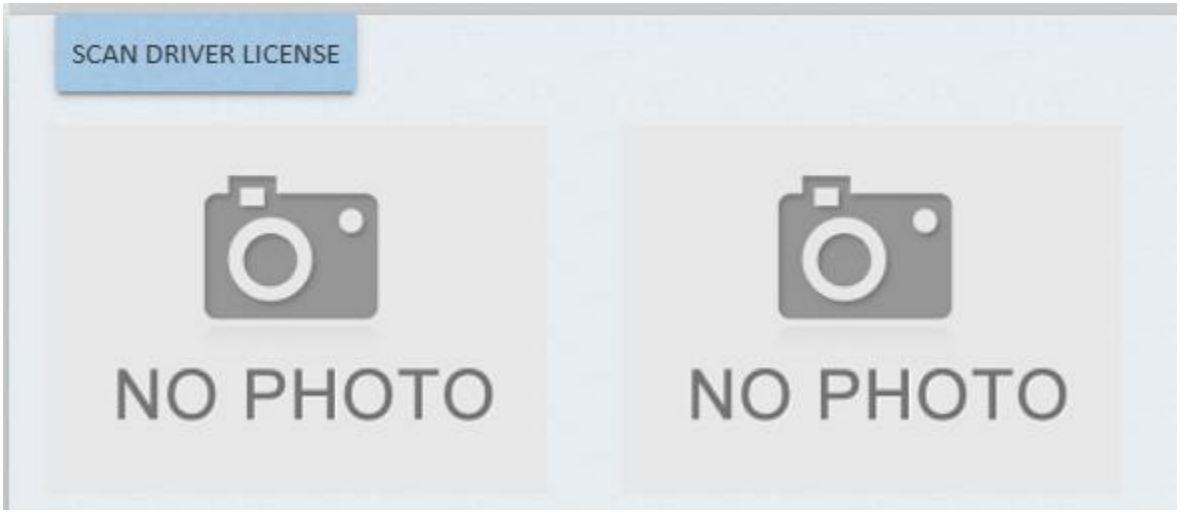


Finally, add the **Visit Reason** and **Save** the record.

Driver License Tab



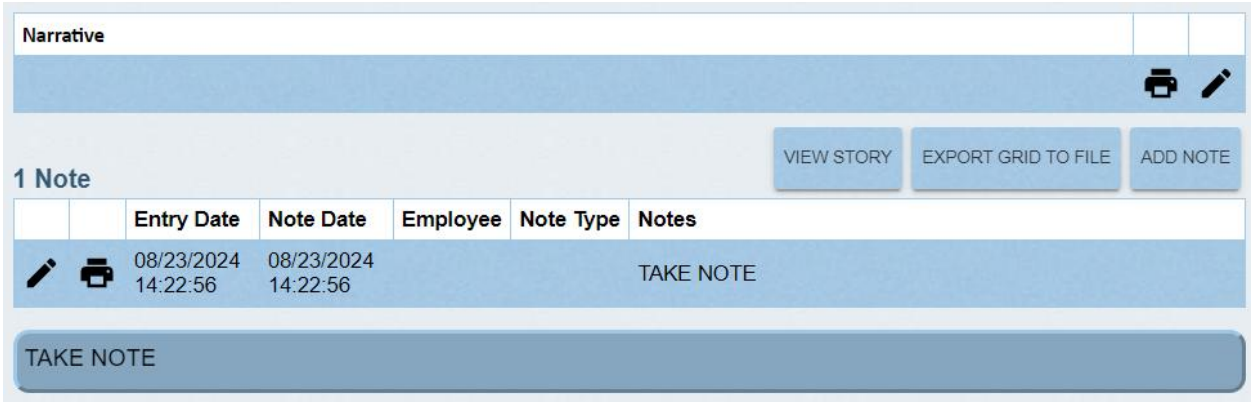
Under the **Driver License** tab, you can use the scanner to scan the volunteer's driver's license.



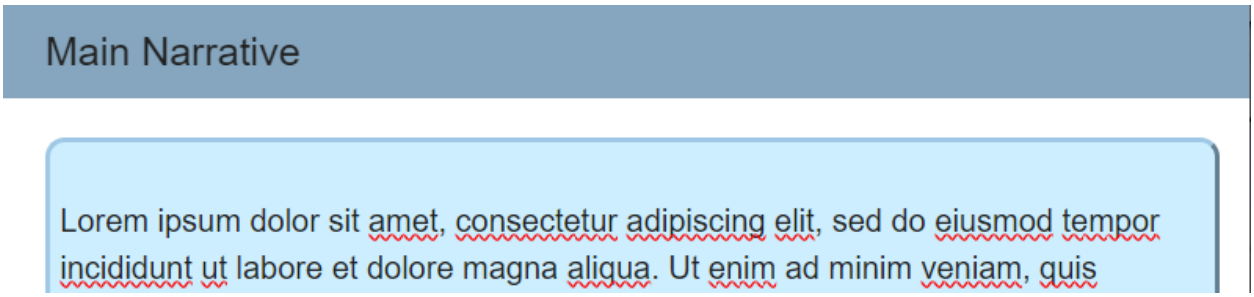
Notes Tab



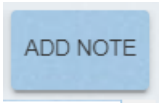
The **Notes** tab is used to view or add notes pertinent to the record. Double-click on any entry in the table to edit or view it.

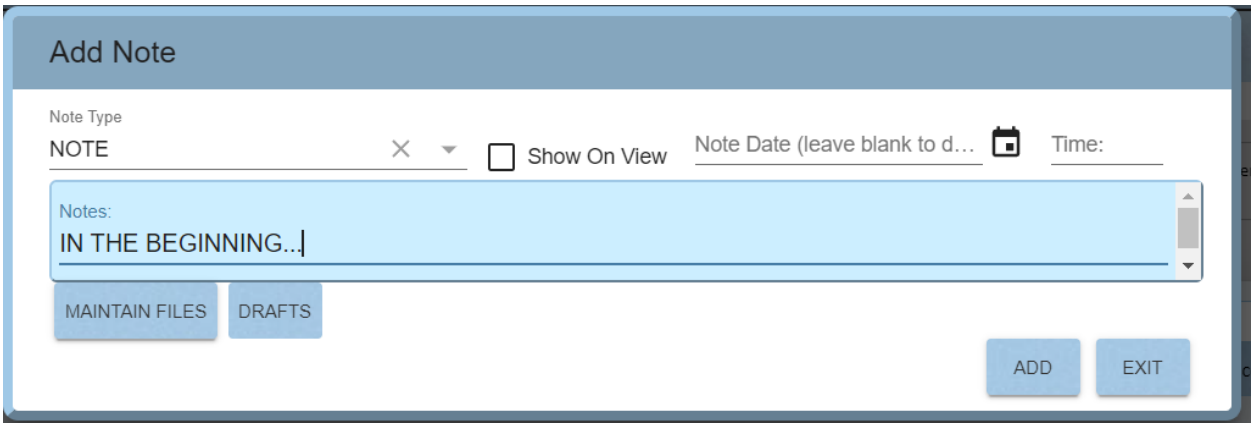


Narrative acts as an area where you can add a long note. This is useful when you want to add important or long form notes that won't be mixed in with the rest of the short notes.



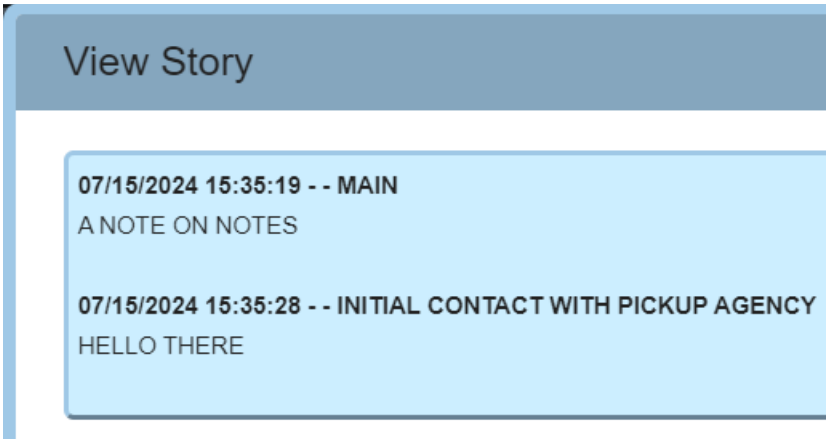
Use **Add Note** to add a new note.





The **View Story** button will show all notes (except Narrative) that have been added on one page.





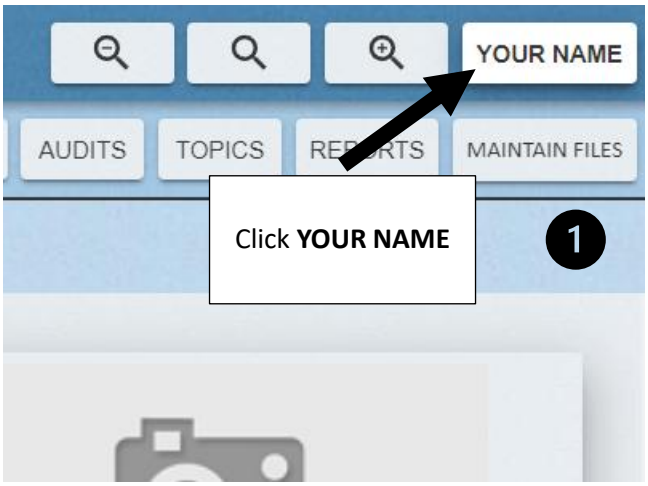
Images Tab

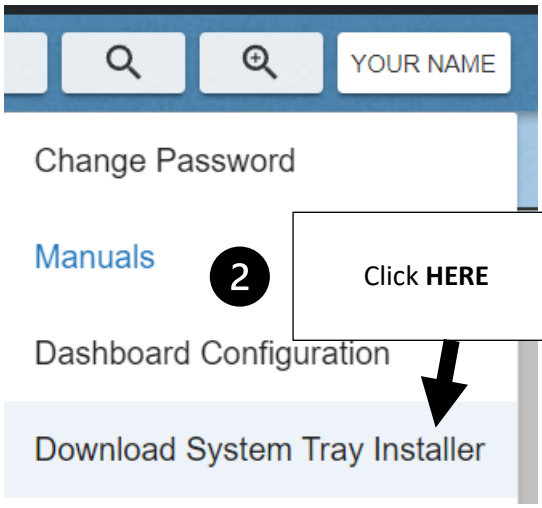


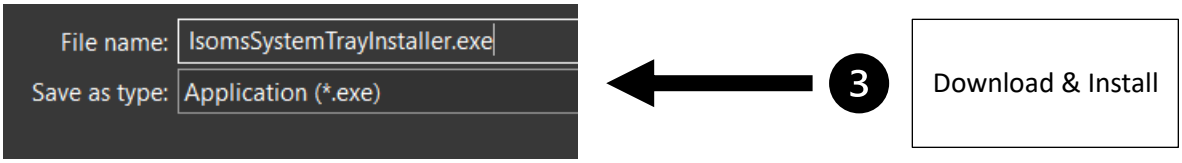
The **Images** tab is used to view, download, or add images. You can add a single image at a time or multiple images at a time. Click **Add Image** to add a single image.



To add multiple images at a time, you will need the System Tray Installer downloaded to the computer you are using. The System Tray Installer can be found on the iSOMS home page by clicking on the button in the upper right with your username. Once you click on that, you will get a drop-down list, and **Download System Tray Installer** is one of the options. Download and install it on this computer.

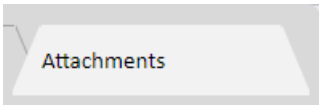




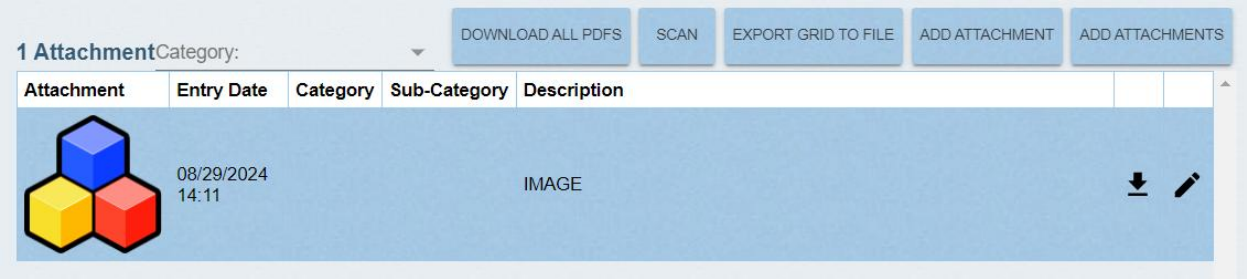


After you have the System Tray Installer on the computer, you can now use the **Add Images** button to upload multiple images at once if necessary.

Attachments Tab



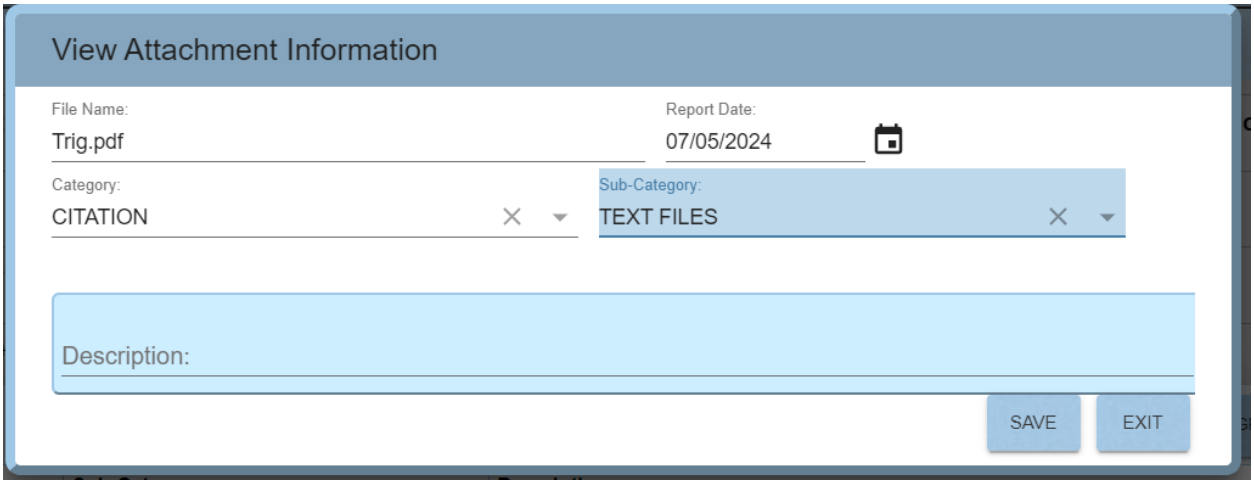
The **Attachments** tab is used to view, download, or add attachments. Double-click a file entry to view the record for the attachment or click on the icon to download the attachment to the computer.



You can add a single attachment at a time or multiple attachments at a time. Just like above with images, you will need the System Tray Installer downloaded to the computer you are using to add multiple attachments at once. See the *Image* tab instructions on the previous few pages for instructions on installing the System Tray Installer.

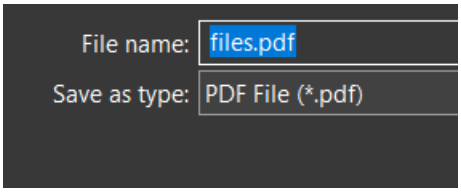
Click **Add Attachment** to add a single attachment or click **Add Attachments** to add multiple attachments at the same time. Choose the attachments from the computer, then add the appropriate category and sub-category for the file.



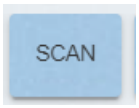


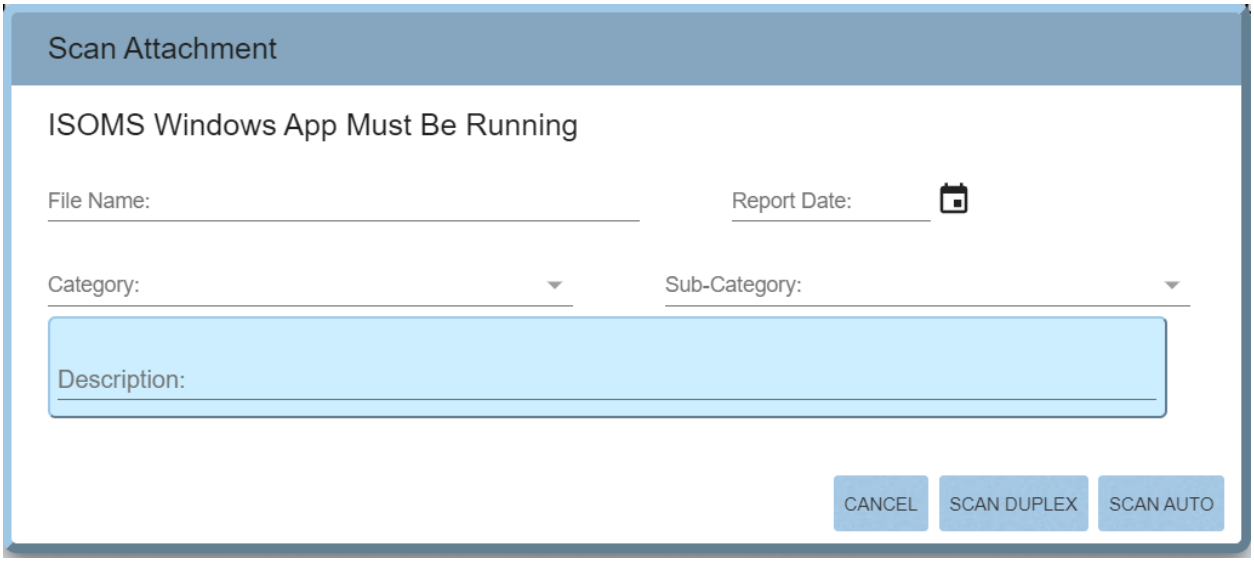
You can also **Download All PDFs** at once by clicking the appropriate button.





If you have the iSOMS Windows App, you can use **Scan** to scan files into the attachments.



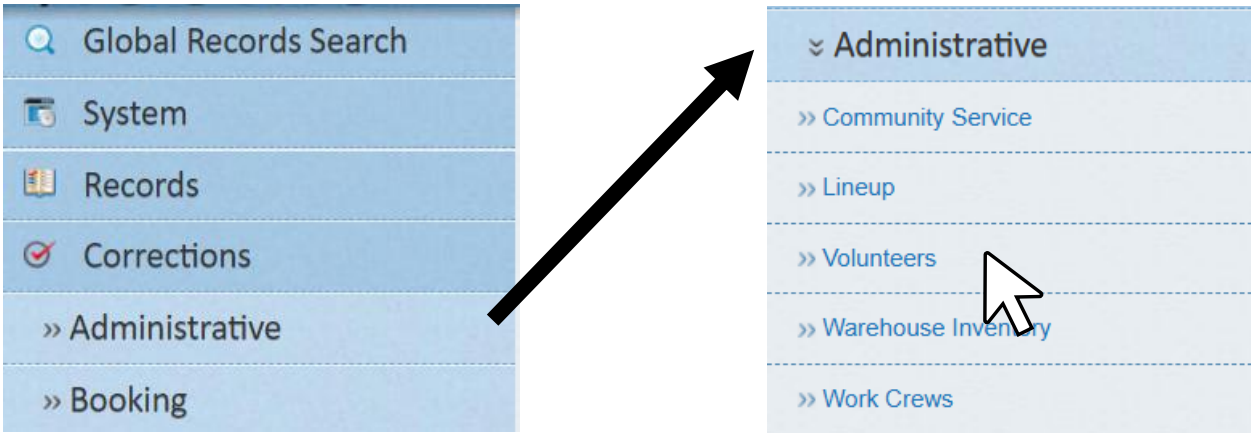


Volunteer Reports

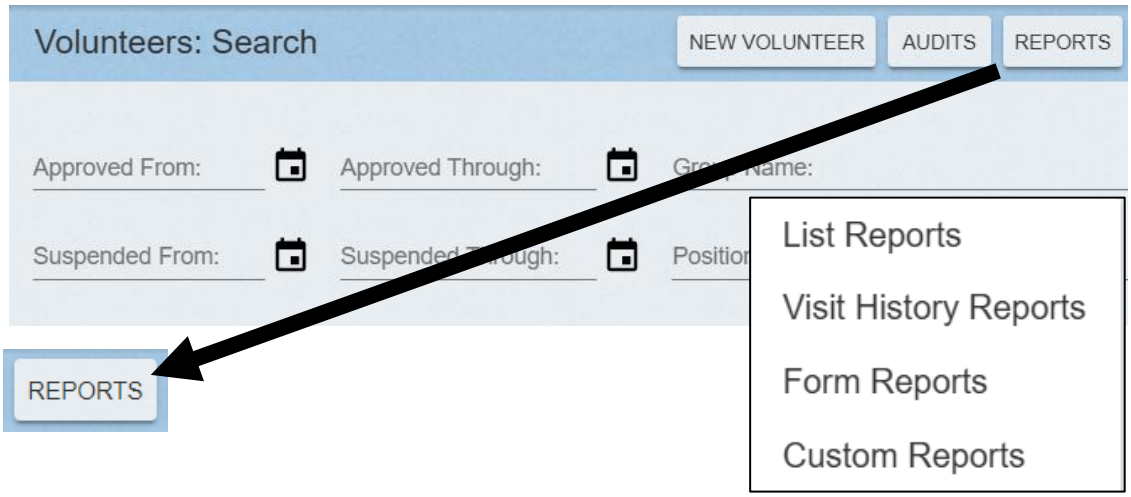
iSOMS has the capability to allow you to print different types of reports for volunteer records.

To access the reports, begin on the iSOMS home screen. Navigate to:

Corrections → Administrative → Volunteers

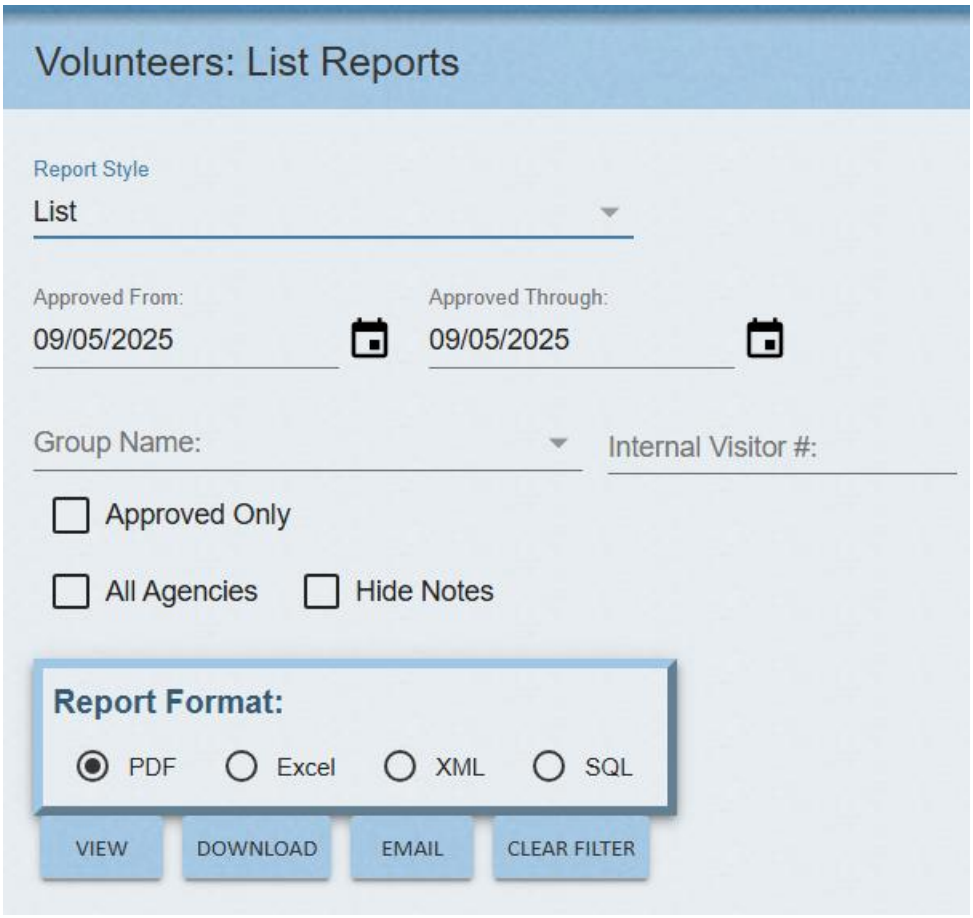


Now click on the **Reports** button in the upper right corner and select the report you wish to run. Different reports are explained over the next set of pages.

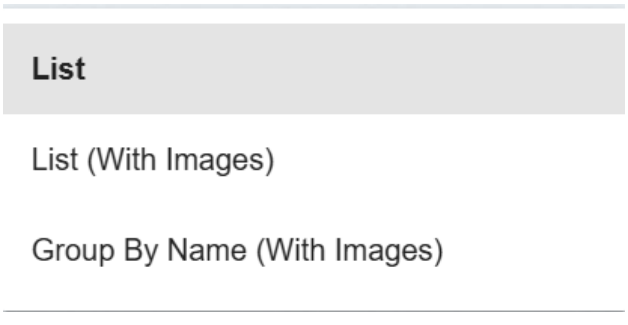


List Reports

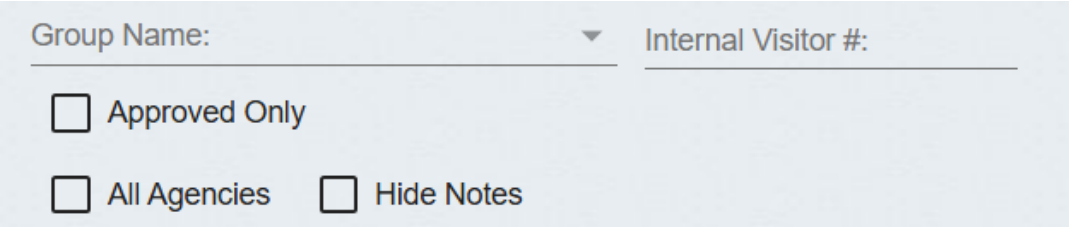
This report displays volunteers records in iSOMS over a certain date range. In this way you can see an overview of volunteers over your chosen time period. Add the approval dates in **Approved From** and **Approved Through**.



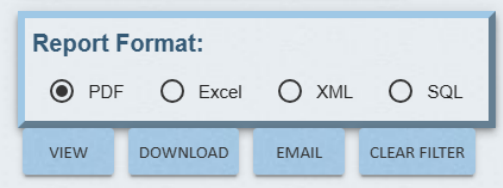
Report Style has some different layout and sorting options, such as *List, List (with Images),* or *Group by Name (with Images).* Pick the one most relevant to your desired result.



You can add certain filters to reduce the list if desired. Also choose if you would like to display or hide notes.



Now, with your chosen parameters, click **View** or **Download** to view the report.



List Report

YOUR AGENCY

Volunteers List

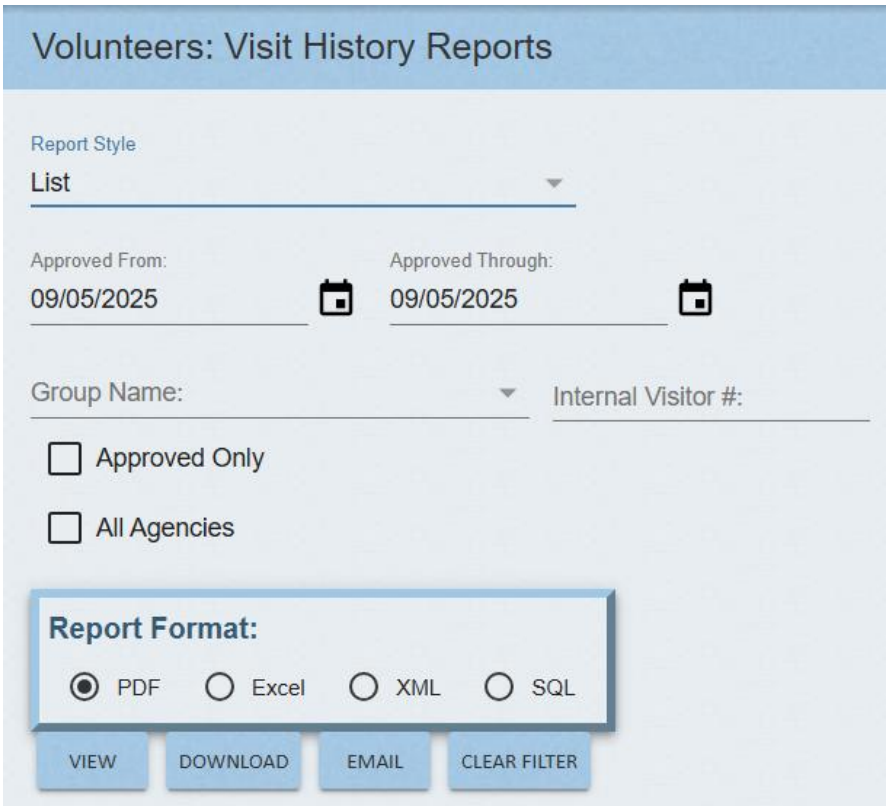
Approved Dates From 09/03/2015 Through 09/05/2025

Page 1 of 7

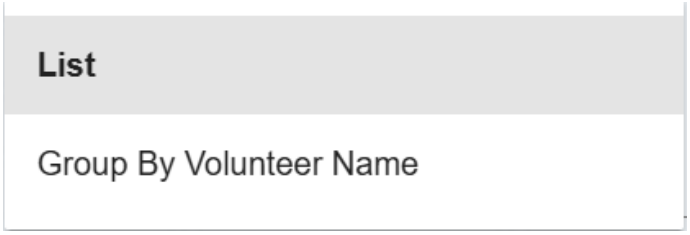
Volunteer Name	Suspended Date	Suspended Reason	Approved
			YES
			YES
			YES
			YES
			YES
			YES
			YES
			YES
			NO
			YES
			YES

Visit History Reports

This report displays visit history entries from the **History** tabs in iSOMS over a certain date range. In this way you can see an overview of visit history over your chosen time period Add the approval dates in **Approved From** and **Approved Through**.



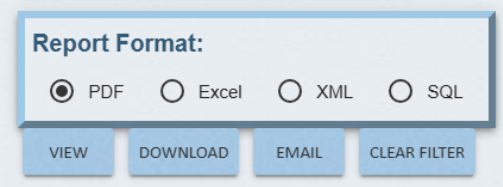
Report Style has some different layout and sorting options, such as *List* or *Group by Volunteer Name.* Pick the one most relevant to your desired result.



You can add certain filters to reduce the list if desired.



Now, with your chosen parameters, click **View** or **Download** to view the report.



List Report

YOUR AGENCY

Volunteers Visit History List

Approved Dates From 04/01/2022 Through 09/05/2025

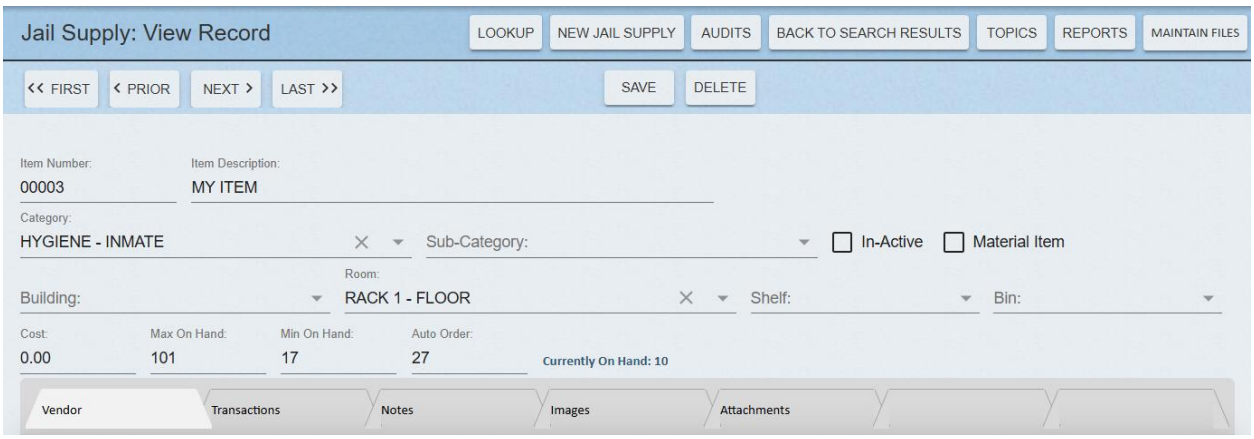
Page 1 of 1

Start Date	End Date	Volunteer Name	
09/05/2025 14:20	09/06/2025 00:00	SLANEY, ABE	
Group Name: SPIRIT OF TRUTH			Visit Reason: CHURCH
09/05/2025 14:37	09/13/2025 00:00	SLANEY, ABE	
Group Name: SPIRIT OF TRUTH			Visit Reason: CHURCH
09/05/2025 14:38	09/05/2025 15:00	SLANEY, ABE	
Group Name: SPIRIT OF TRUTH			Visit Reason: HE WANTED TO START A NEW CHURCH IN JAIL

Count: 3

Warehouse Inventory / Jail Supply

The **Jail Supply** module lets you track items available for your jail, such as items needed for work crews, community service, or volunteers. You can record types of items, their location, their cost, and the count you have on hand. This section will explain searching existing jail supply records, creating a new item record, filling out an item record, and adding transactions for items via the topics menu.



The first part of this section explains searches. If you need explanations on an already existing record, see the *Filling Out a Jail Supply Record* to get more information on the different fields and tabs available.

Searching for Existing Jail Supply Records

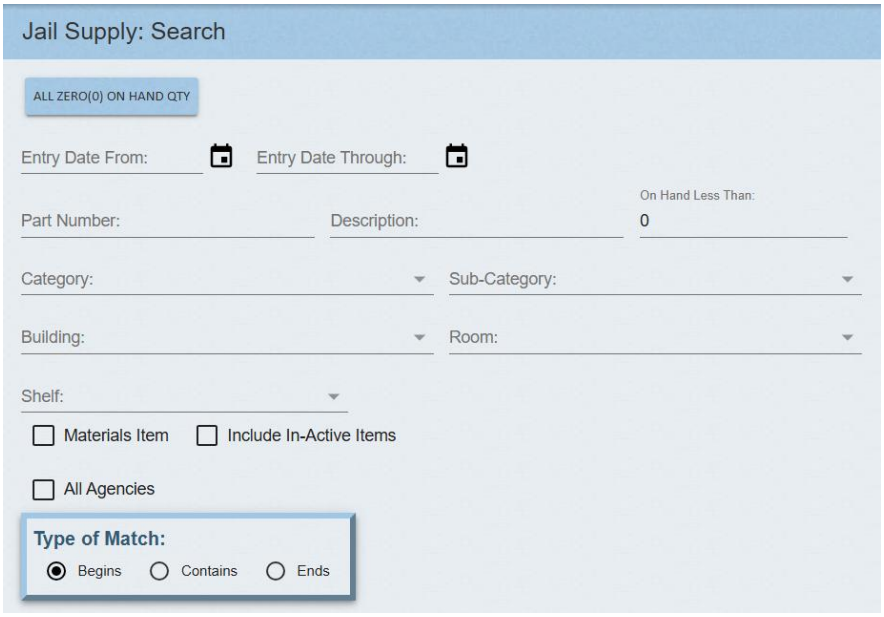
To search existing records, begin on the iSOMS home screen.

Navigate to:

Corrections → Administrative → Warehouse Inventory

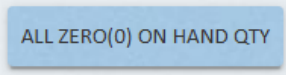


This will open the **Jail Supply: Search** screen. Here you can search and filter for different jail supply records. You can either use the **All Zero on Hand Qty** button to do a *quick search* or enter information in the fields to do *standard searches.*



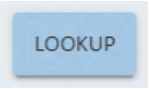
Quick Search

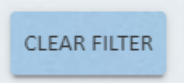
A quick search is available by using the **All Zero on Hand Qty** button. This will return all records of items that you have zero recorded on hand in iSOMS.



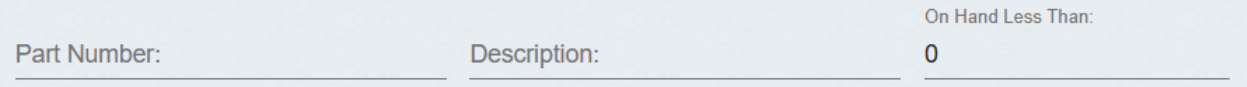
Standard Searches

Various fields are available to narrow searches. Fill in the fields to narrow the search and click **Lookup** at the top or bottom of the page to perform the search. If you need to start over, simply click **Clear Filter** to remove all search field entries.



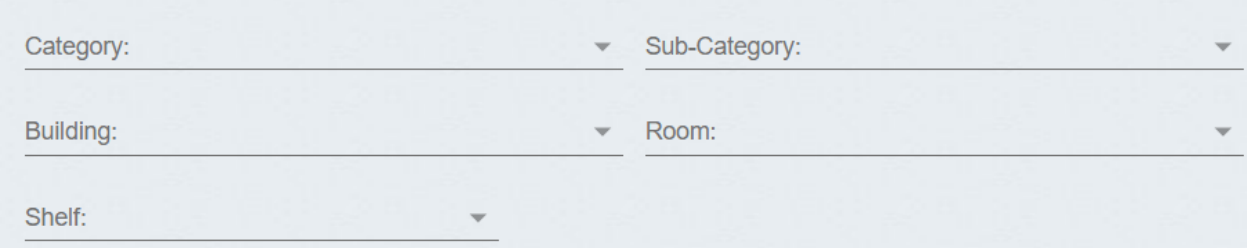


Selected Field Explanations



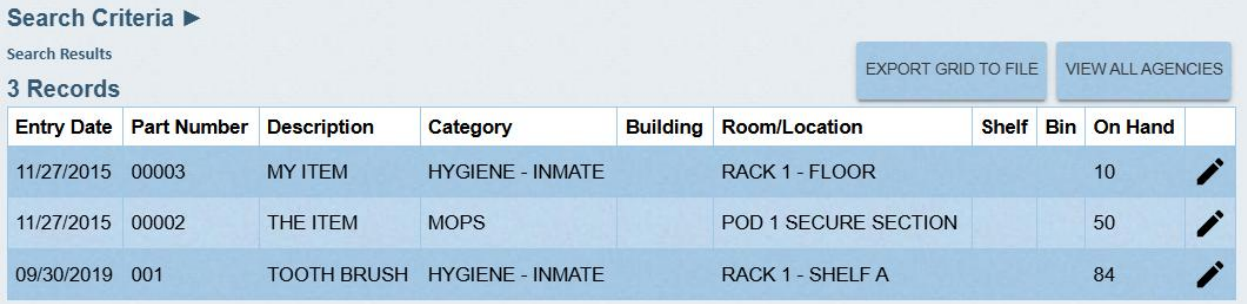
Part Number lets you search based on the part number. (Remember that the search, by default, matches the beginning of what you are searching for. If you want to change it because you remember the end of a number, for example, then you should change **Type of Match** near the bottom to *Contains* or *Ends*.)

Description is the field that names the item. **On Hand Less Than** lets you search for all items where you have less than the specified number: if you put 10, for example, you will get all item records that you have 9 or less of.



Use these fields to narrow the search by the location of the item.

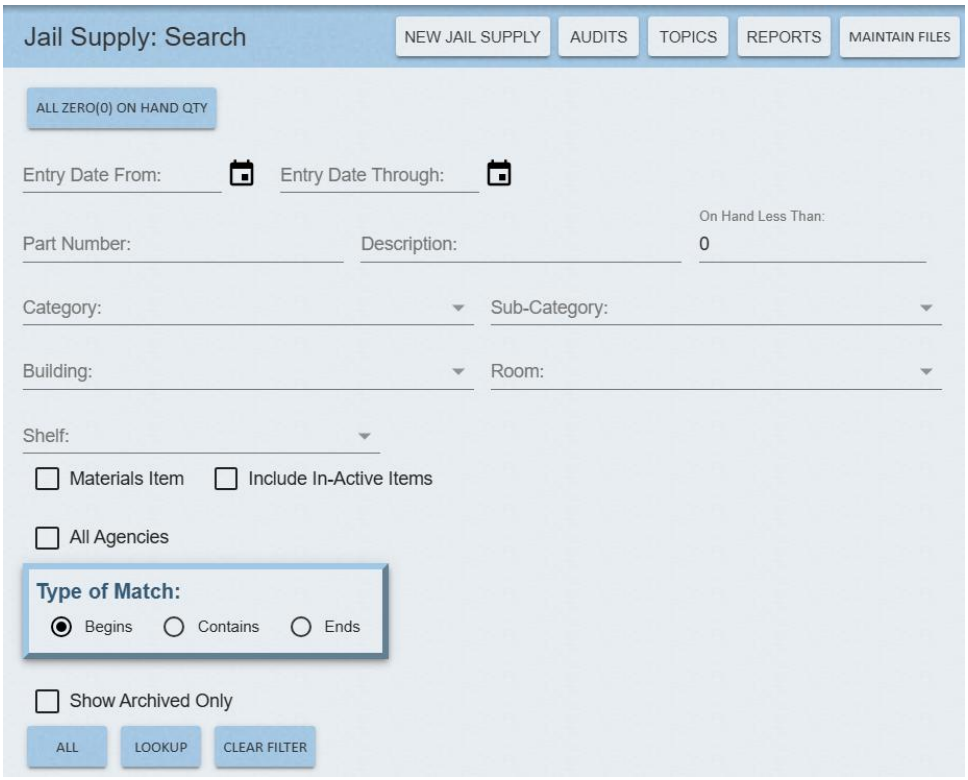
As mentioned above, when you have finished with your search parameters, click **Lookup** to perform your search. Double click on the desired entry to view or edit the record.

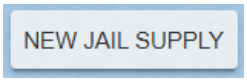


Entry Date	Part Number	Description	Category	Building	Room/Location	Shelf	Bin	On Hand	
11/27/2015	00003	MY ITEM	HYGIENE - INMATE		RACK 1 - FLOOR			10	
11/27/2015	00002	THE ITEM	MOPS		POD 1 SECURE SECTION			50	
09/30/2019	001	TOOTH BRUSH	HYGIENE - INMATE		RACK 1 - SHELF A			84	

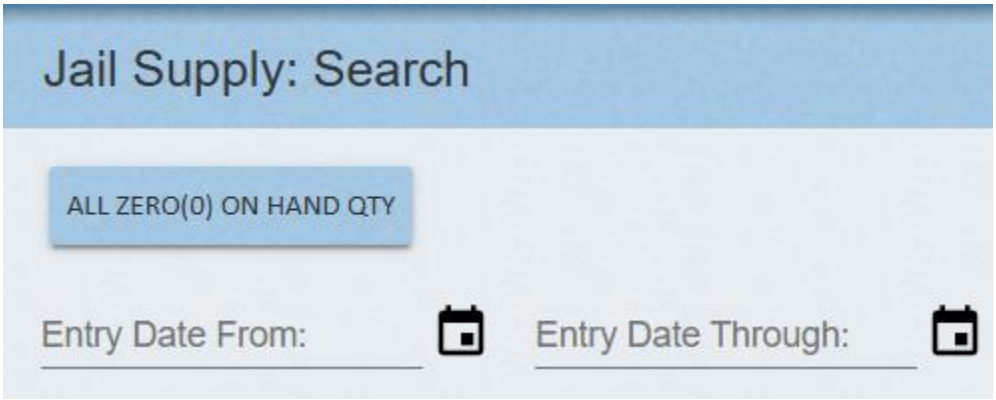
Creating a New Jail Supply Record

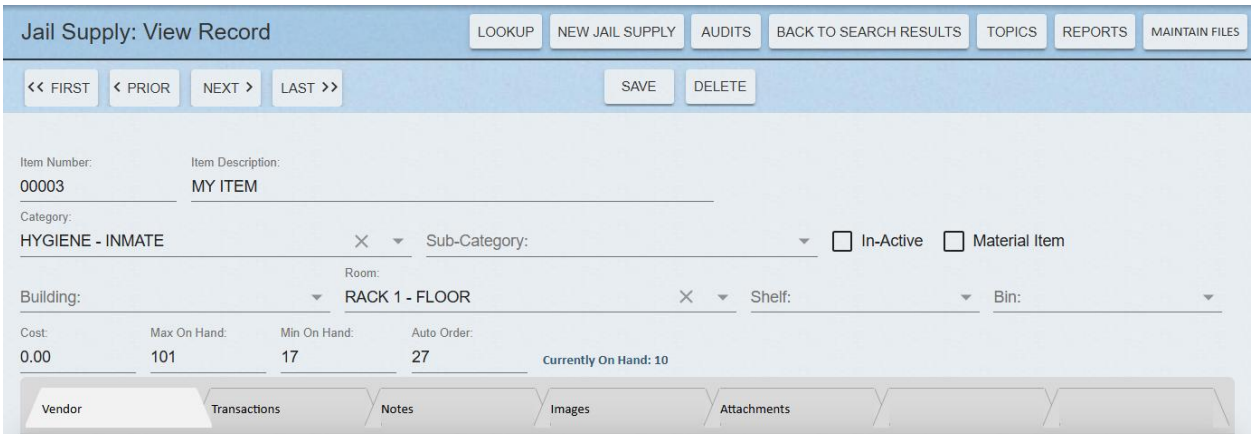
To create a new jail supply record, click **New Jail Supply** in the upper right corner of the Jail Supply search screen:





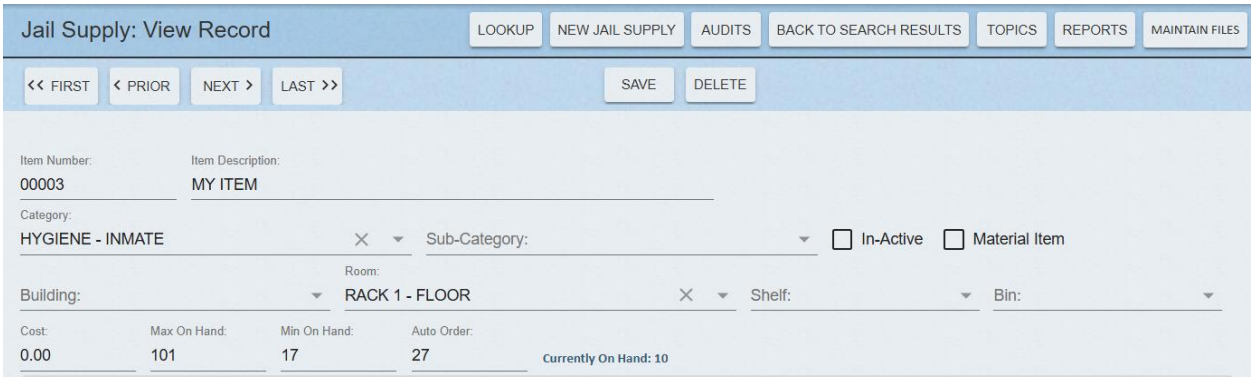
This will create and open the new record.



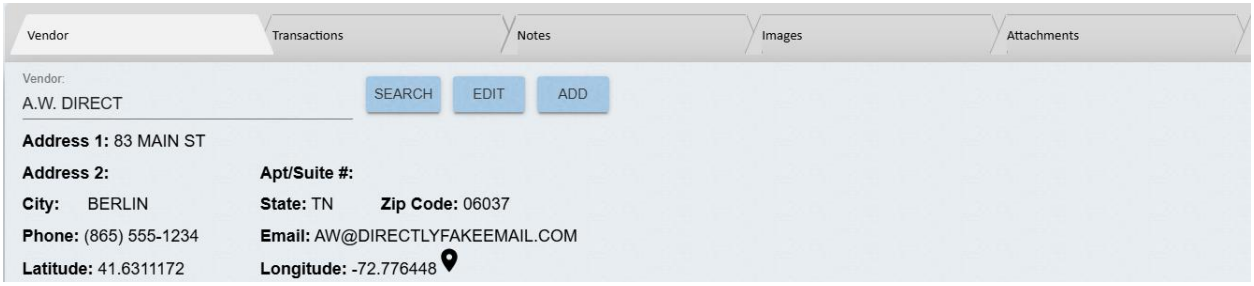


There are two primary sections of the report:

1. The *fields* in the upper part of the screen. These record details about the item, its location, category, cost, needed amounts, and amount on hand.



2. The *tabs* record information about the vendor, transactions, notes, images, and attachments.



Fill out the fields at the top of the screen and then make sure to fill out the **Vendor** tab. If other notes or attachments are needed, you can add them to **Notes, Images,** and **Attachments**. This process is covered in detail in the next section, *Filling Out a Jail Supply Record.*

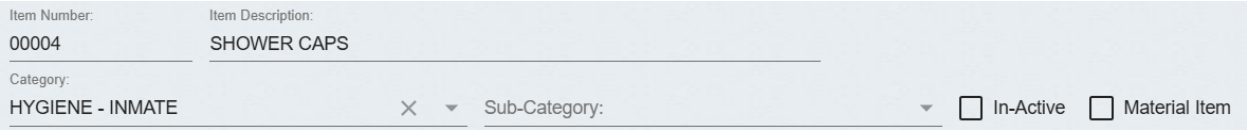
After you enter new details, make sure to click **Save** at the top of the screen.

Filling Out a Jail Supply Record – Fields

This section explains in detail the different fields and tabs for a jail supply record. The top section of the report with fields should always be filled out when relevant information is available, and the tabs should be filled out as needed.

You will type in the details of the item in these fields. To add the vendor where you purchased the items, use the **Vendor** tab. To change the amount iSOMS lists as *On Hand*, you will use the **Topics** button to perform supply orders, physical counts, and orders dispensed.

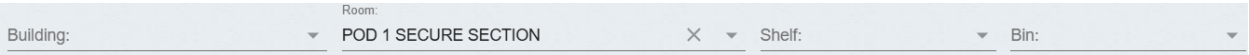
Fields



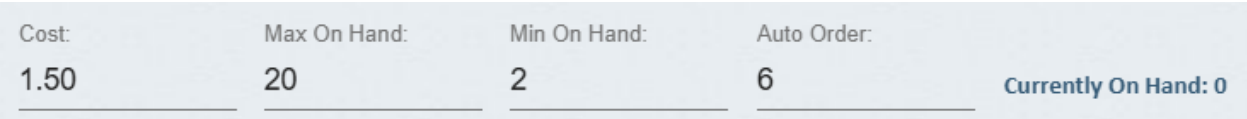
These fields relate to describing and categorizing the item. First, add the **Item Number.** Then name the item (or what the item is) in **Item Description.**

You can add **Category** and **Sub-Category.** Super Users can add additional options for these under *Maintain Files.* (See *Appendix B: Maintain Files Procedure* on page 726 for more information.)

If the item should be inactived, check **In-Active**. If the item is a material item, such as building materials or similar items for work crews, check **Material Item.**

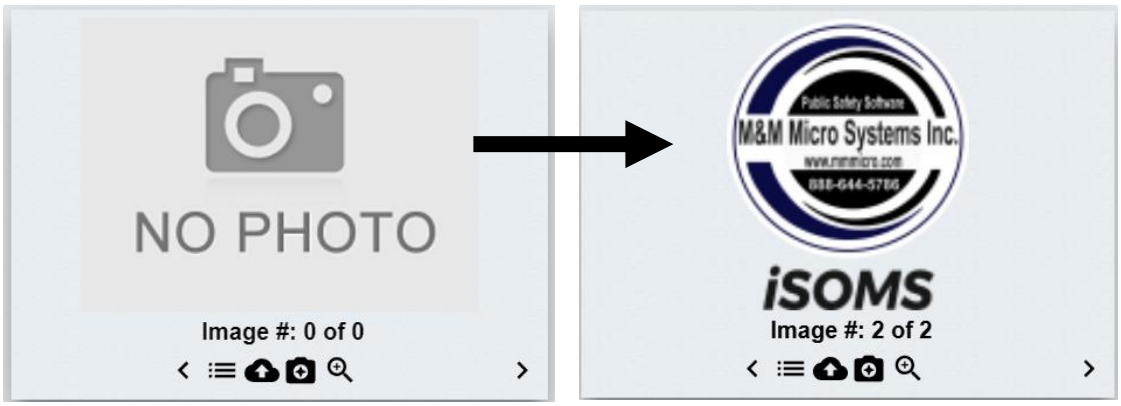


These fields relate to the location of the item in storage.



These fields relate to the cost and needed amounts for the item. Add the usual **Cost** for the item, the **Max On Hand** that your agency should have, the needed minimum amount in **Min on Hand**, and the amount that should be placed on automatic order in **Auto Order.**

If you would like to add an image of item individual, you can click **Upload Image ( ) or Take New Photo ( )** on the right. Select or take the image and it will be added.



Remember to hit **Save** at the top of the screen often as you fill out the record to avoid losing information.

***Save** is located at the top of the screen.*



Filling Out a Jail Supply Record – Tabs

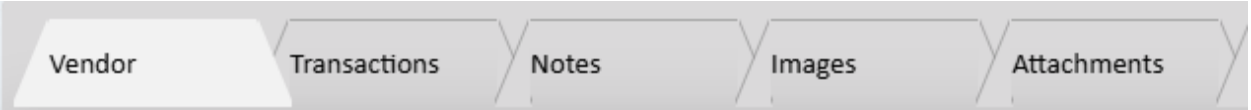
Summary

Fill out the tabs below the fields as needed.

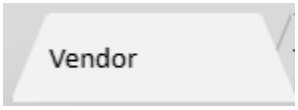
The **Vendor** tab lets you record the vendor for the item.

Transactions records all transactions of buying the item, using the item, or physical counts of the items. **This tab is read-only**. New transactions are logged via the **Topics** button.

Notes, **Images**, and **Attachments** tabs are available if you need to take additional notes or upload images and documents.

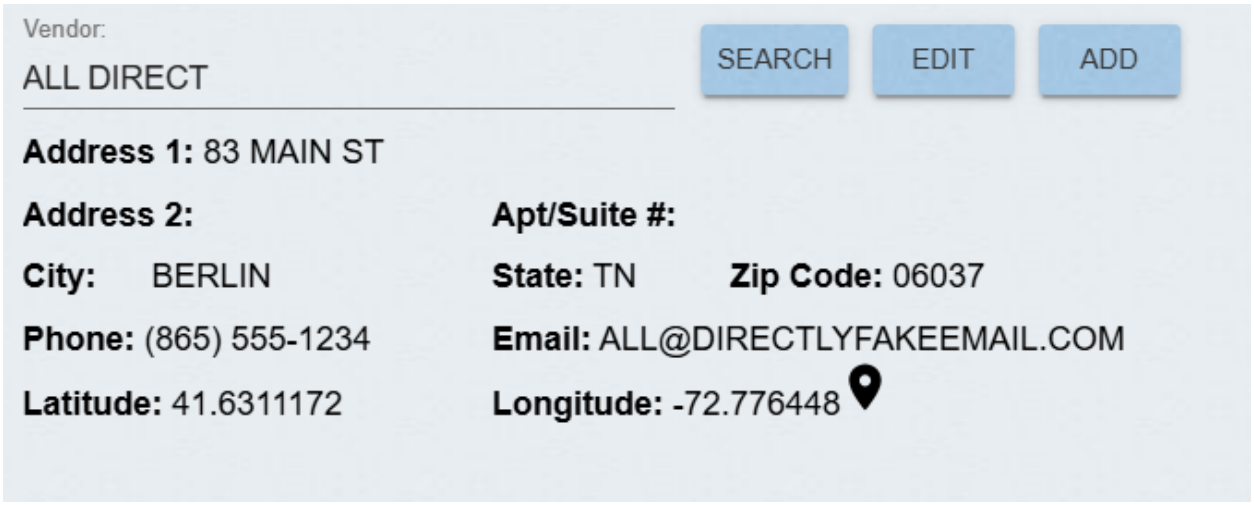


Vendor Tab

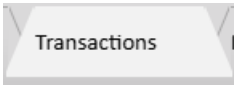


The **Vendor** tab contains information on the vendor who sold or gave you the item.

If you already have the business in your records, simply type the name (such as **ALL DIRECT**) and it will appear automatically. If you don't have the business in iSOMS or for more information on inputting new organizations into iSOMS for quick reference later, see *Appendix C, Business / Organization Records* on page 728.

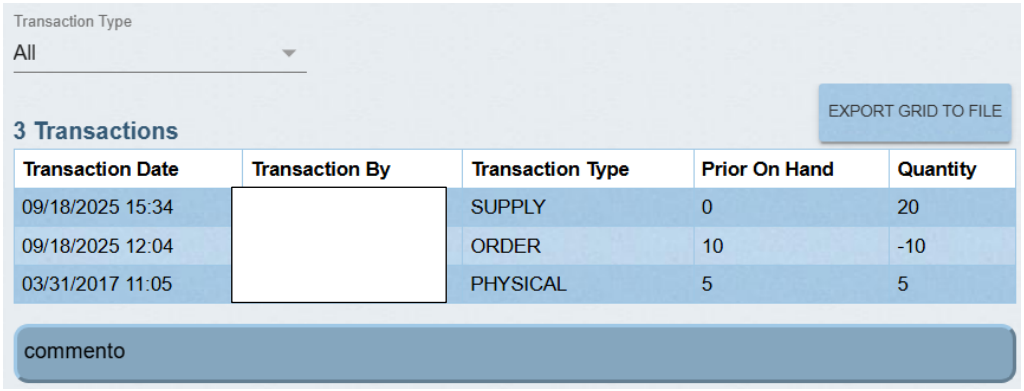


Transactions Tab



The **Transactions** tab lists the different types of transactions (supply, physical counts, orders) and the amounts of the item. This table is **read-only**. In order to add new transactions, you will need to use the **Topics** button. See *Jail Supply Topics* on page 573 for more information.

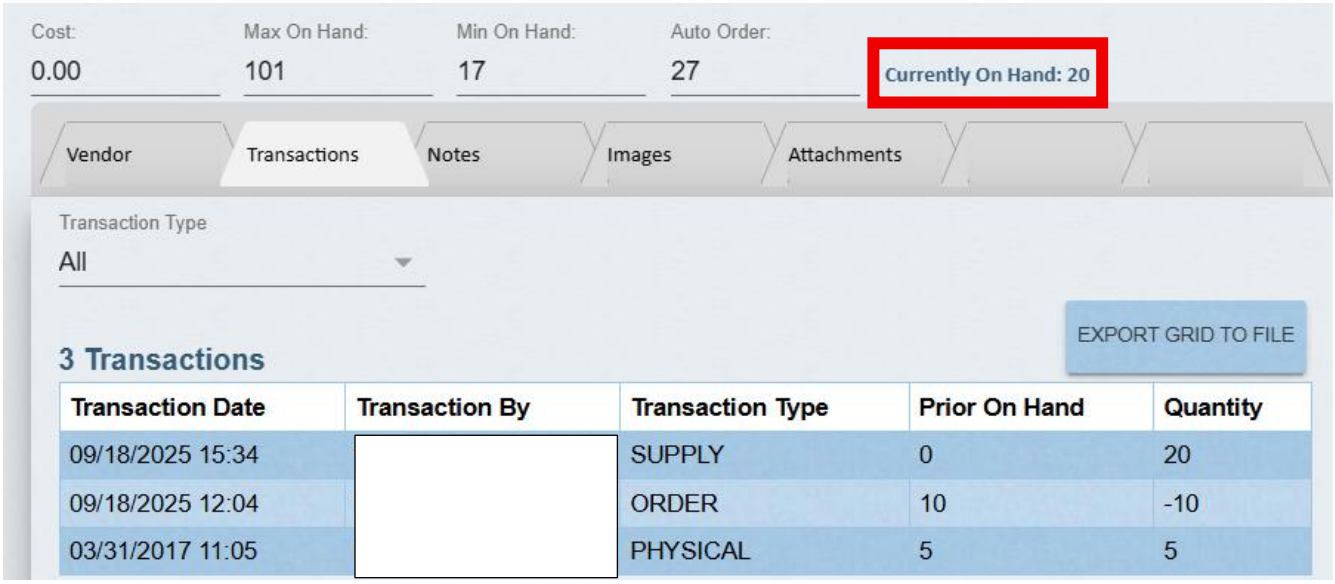
To view any comment on a transaction, click the entry and it will appear in the bottom box.



The **current total** is listed above the tabs, as **Currently On Hand.** It will be all of the **Supply** transactions *minus* the **Order** transactions. However, when you do a **Physical Count**, it will reset to the amount you input.

Total: (*Most Recent Physical Count PLUS Supply Transactions) MINUS Order Transactions*

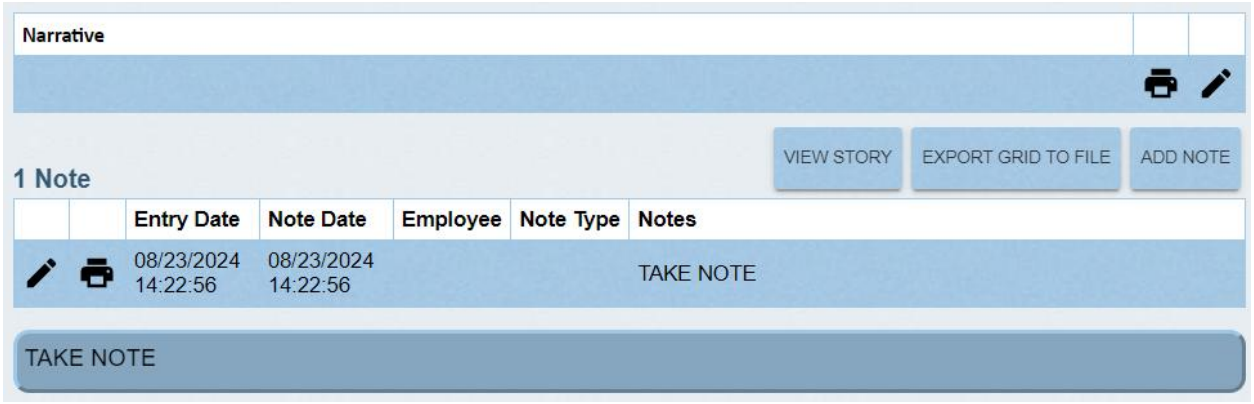
➔ ***Only includes Supply and Order amounts after the most recent physical count***



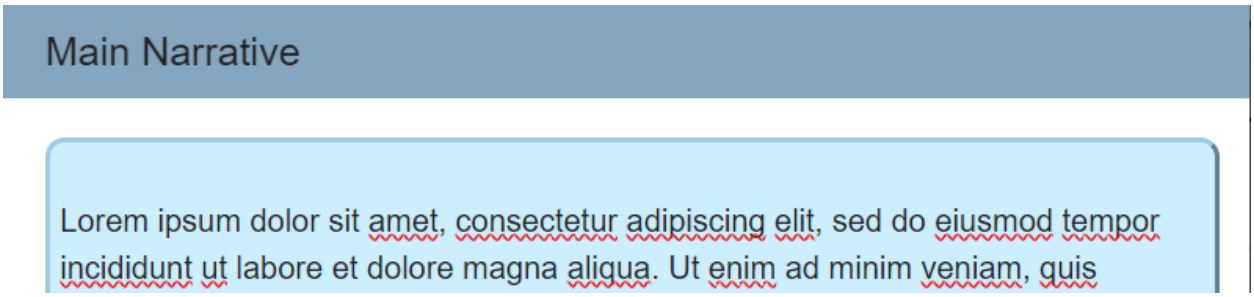
Notes Tab



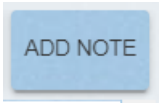
The **Notes** tab is used to view or add notes pertinent to the record. Double-click on any entry in the table to edit or view it.

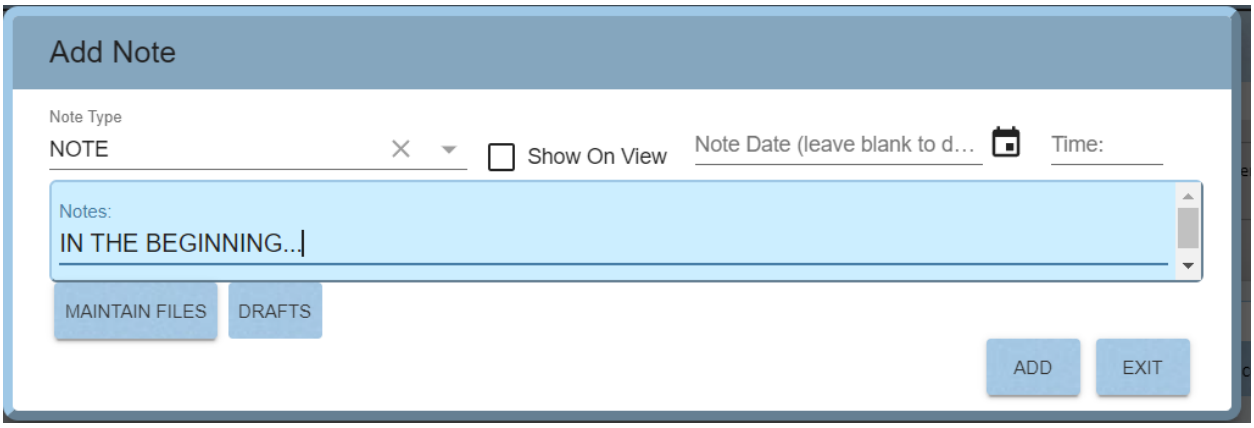


Narrative acts as an area where you can add a long note. This is useful when you want to add important or long form notes that won't be mixed in with the rest of the short notes.



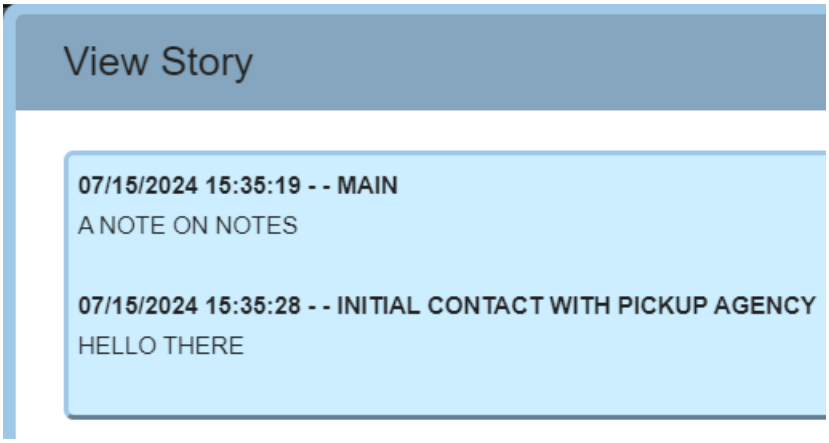
Use **Add Note** to add a new note.





The **View Story** button will show all notes (except Narrative) that have been added on one page.





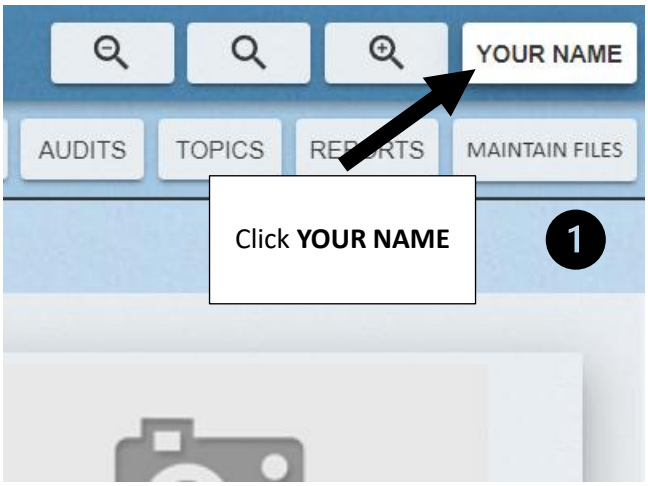
Images Tab

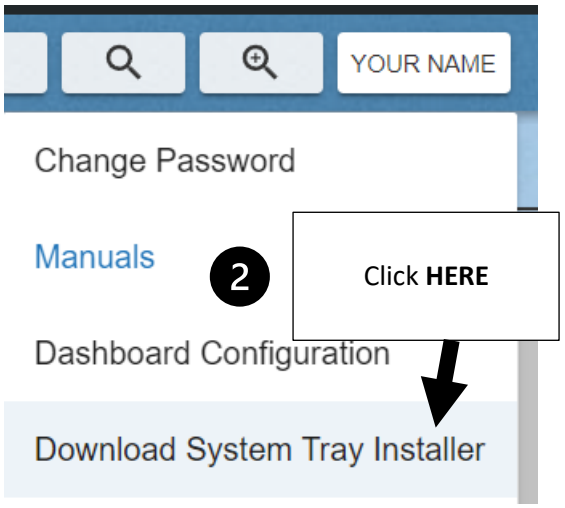


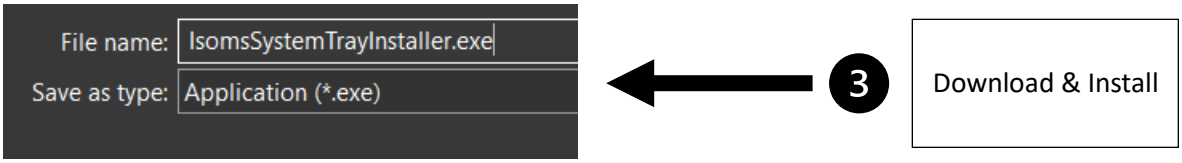
The **Images** tab is used to view, download, or add images. You can add a single image at a time or multiple images at a time. Click **Add Image** to add a single image.



To add multiple images at a time, you will need the System Tray Installer downloaded to the computer you are using. The System Tray Installer can be found on the iSOMS home page by clicking on the button in the upper right with your username. Once you click on that, you will get a drop-down list, and **Download System Tray Installer** is one of the options. Download and install it on this computer.

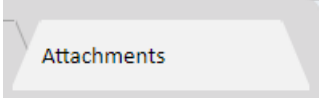




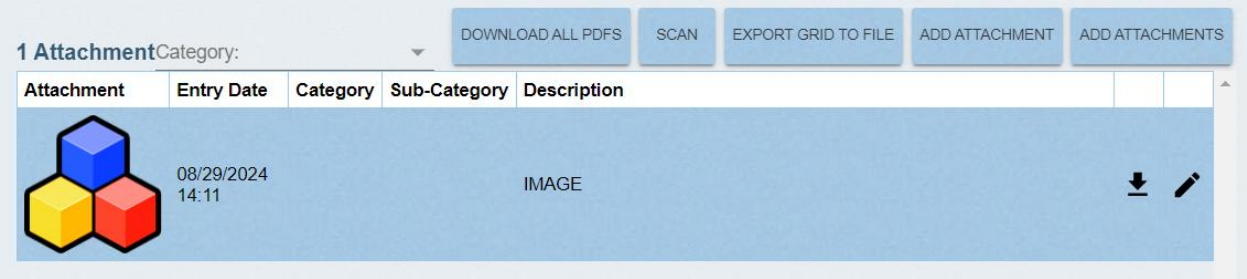


After you have the System Tray Installer on the computer, you can now use the **Add Images** button to upload multiple images at once if necessary.

Attachments Tab



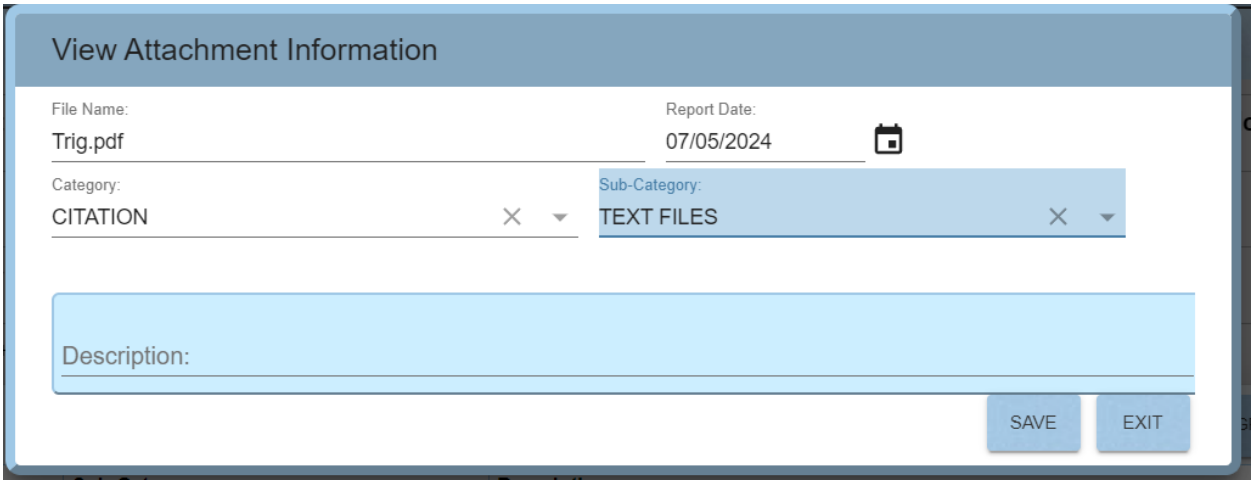
The **Attachments** tab is used to view, download, or add attachments. Double-click a file entry to view the record for the attachment or click on the icon to download the attachment to the computer.



You can add a single attachment at a time or multiple attachments at a time. Just like above with images, you will need the System Tray Installer downloaded to the computer you are using to add multiple attachments at once. See the *Image* tab instructions on the previous few pages for instructions on installing the System Tray Installer.

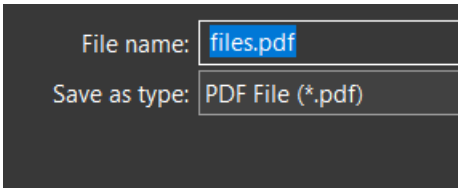
Click **Add Attachment** to add a single attachment or click **Add Attachments** to add multiple attachments at the same time. Choose the attachments from the computer, then add the appropriate category and sub-category for the file.



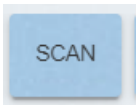


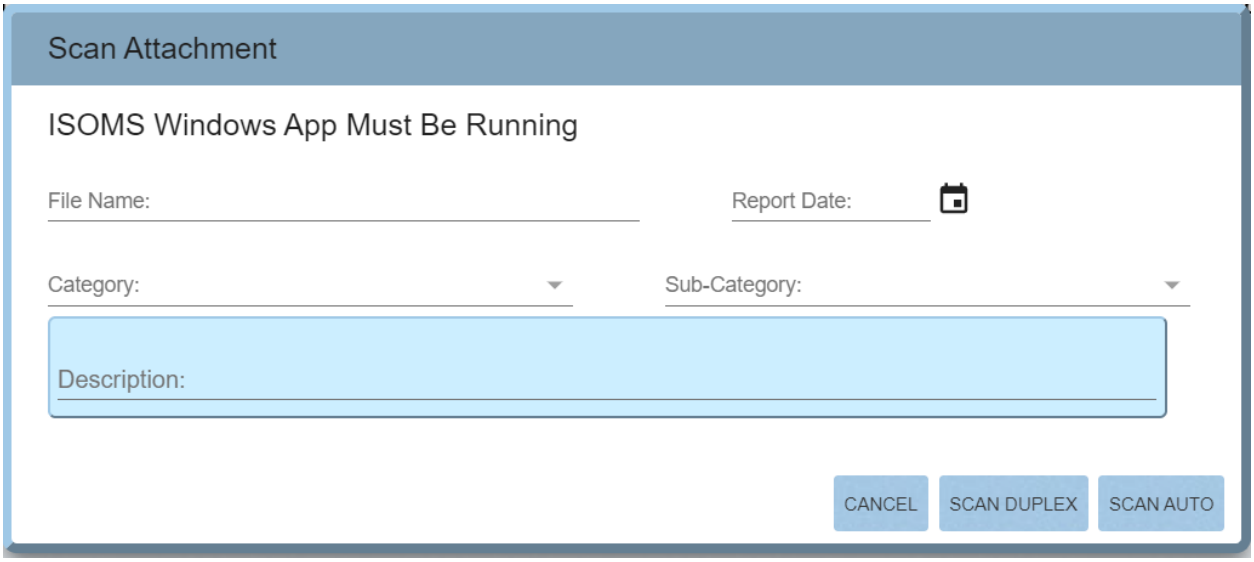
You can also **Download All PDFs** at once by clicking the appropriate button.





If you have the iSOMS Windows App, you can use **Scan** to scan files into the attachments.





Jail Supply Topics

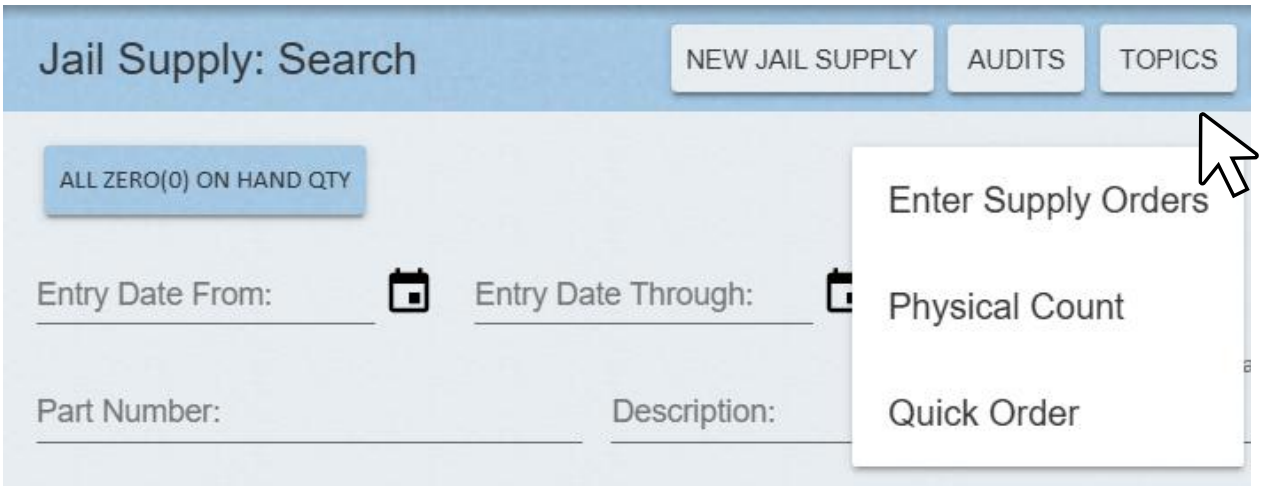
The **Topics** button lets you do special actions in different modules. In **Jail Supply**, if you use the **Topics** button, you will be able to log transactions for items in your jail supply / warehouse inventory.

Once you have opened the **Jail Supply** module, you can click **TOPICS** to see the different options. There are three options:

Enter Supply Orders: Supply Orders allows you to **ADD** to an item's count and should be used when you buy or are given an item.

Physical Count: Physical Counts **RESET** an item's count and should be used when doing audits / re-confirming the amount of item on hand.

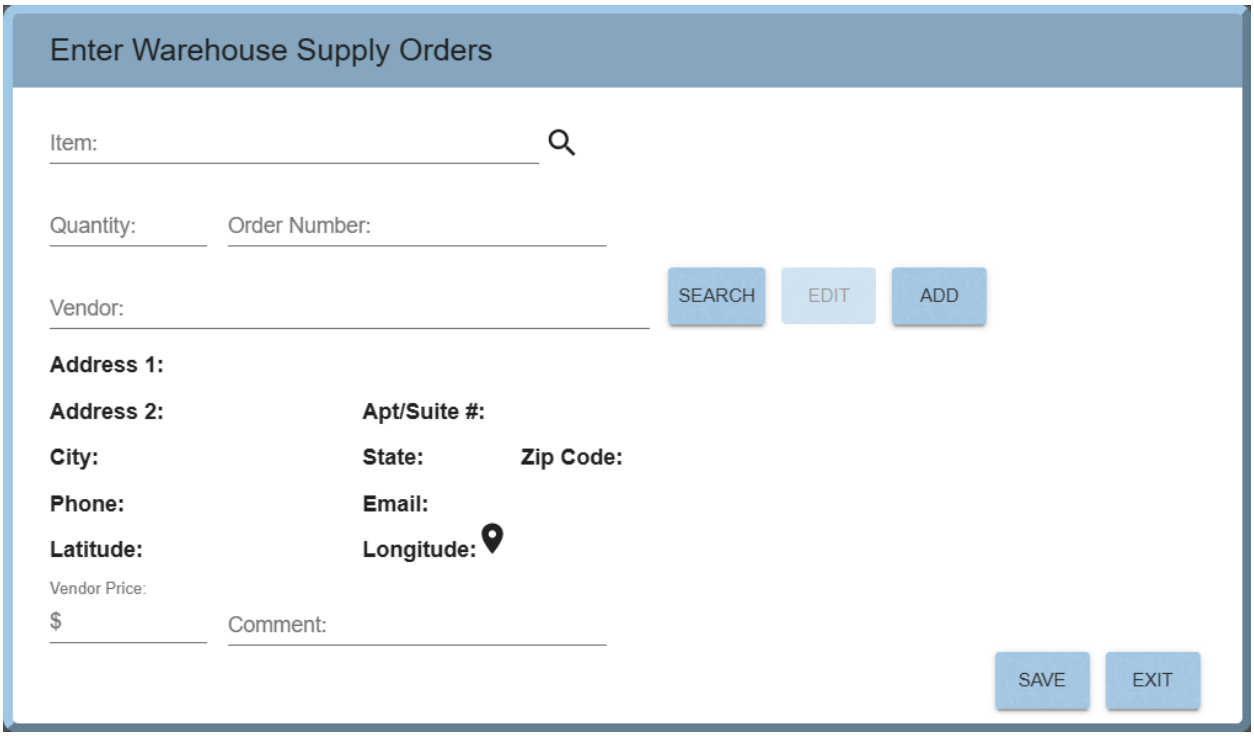
Quick Order: Quick Orders **SUBTRACT** from an item's count and should be used when you use, dispense, or dispose of an item.

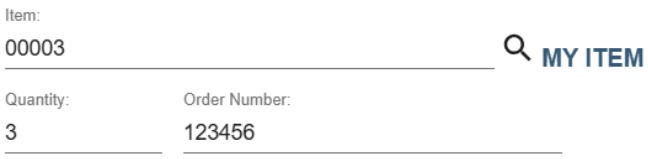


Click the appropriate button that you want to use, and fill in the details as explained on the next few pages.

Supply Orders

Supply Orders allows you to **ADD** to an item's count and should be used when you buy or are given an item.

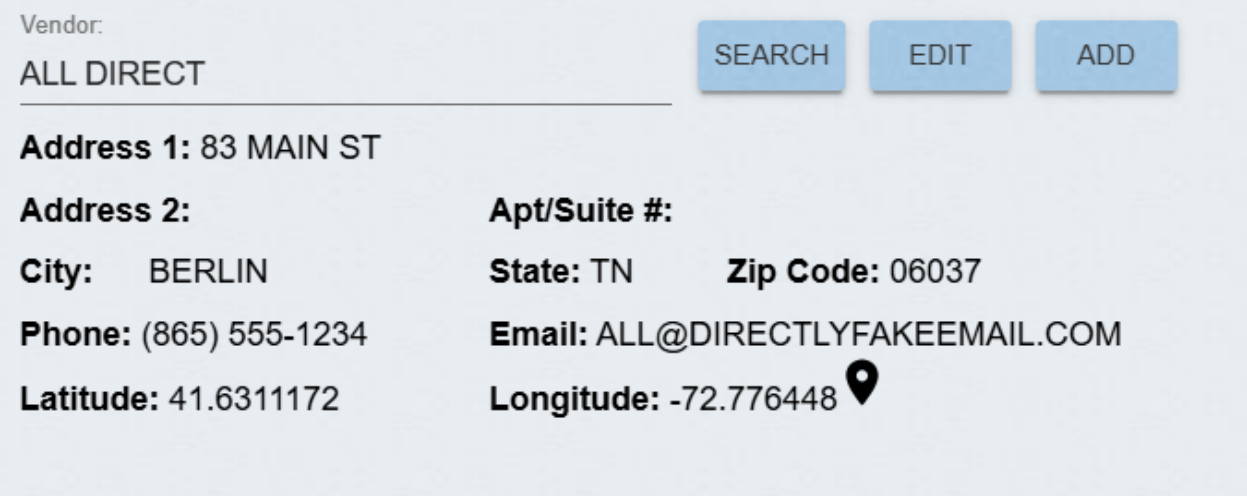




First type the **Item** name or number, or click the magnifying glass icon ( ) to search for your item.

Now add the amount you are adding in **Quantity** and the **Order Number** if applicable.

Continued on the next page



Now add the **Vendor** that sold or gave you the item.

If you already have the business in your records, simply type the name (such as **ALL DIRECT**) and it will appear automatically. If you don't have the business in iSOMS or for more information on inputting new organizations into iSOMS for quick reference later, see *Appendix C, Business / Organization Records* on page 728.



Finally, add the **Vendor Price** and any **Comment** you wish to add, then click **Save.**

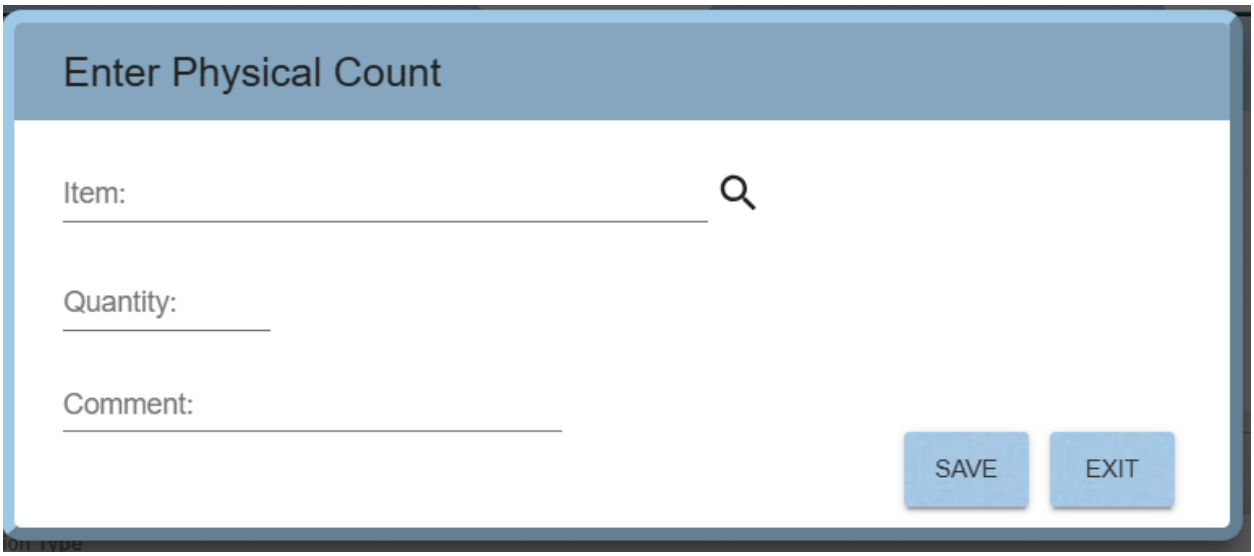
Result:

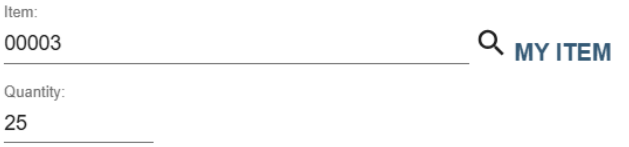
Transaction Date	Transaction By	Transaction Type	Prior On Hand	Quantity
09/19/2025 11:36	EMPLOYEE	SUPPLY	20	3

Currently On Hand: 23

Physical Counts

Physical Counts **RESET** an item's count and should be used when doing audits / re-confirming the amount of item on hand.





First type the **Item** name or number, or click the magnifying glass icon ( ) to search for your item.

Now write the amount that you actually have of the item in the **Quantity** field.



Add any **Comment** and hit **Save.** Then you will see that *Currently On Hand* will be set to the number you entered.

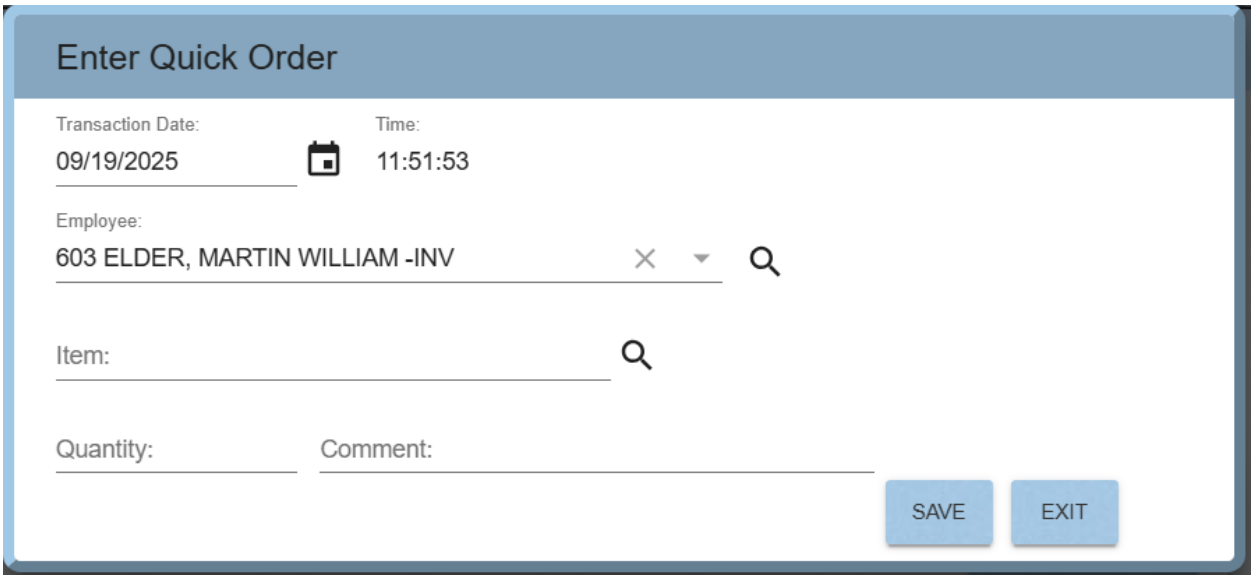
Result:

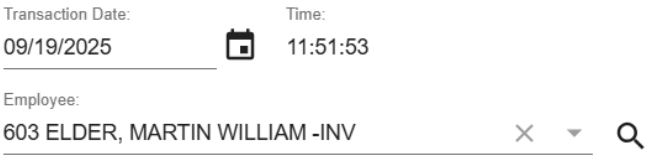
Transaction Date	Transaction By	Transaction Type	Prior On Hand	Quantity
09/19/2025 11:41	EMPLOYEE	PHYSICAL	23	2

Currently On Hand: 25

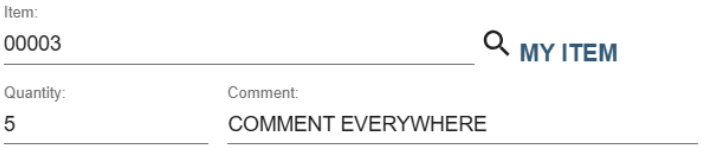
Quick Orders

Quick Orders **SUBTRACT** from an item's count and should be used when you use, dispense, or dispose of an item.





If you need to, you can adjust the **Transaction Date** or **Employee.**



Now type the **Item** name or number, or click the magnifying glass icon ( ) to search for your item. Write the amount that you want to subtract from the item count in the **Quantity** field. Add any **Comment** and hit **Save.** Then you will see that *Currently On Hand* will subtract the number you entered.

Result:

Transaction Date	Transaction By	Transaction Type	Prior On Hand	Quantity
09/19/2025 11:51	ELDER, MARTIN	ORDER	25	-5

Currently On Hand: 20

Jail Supply Reports

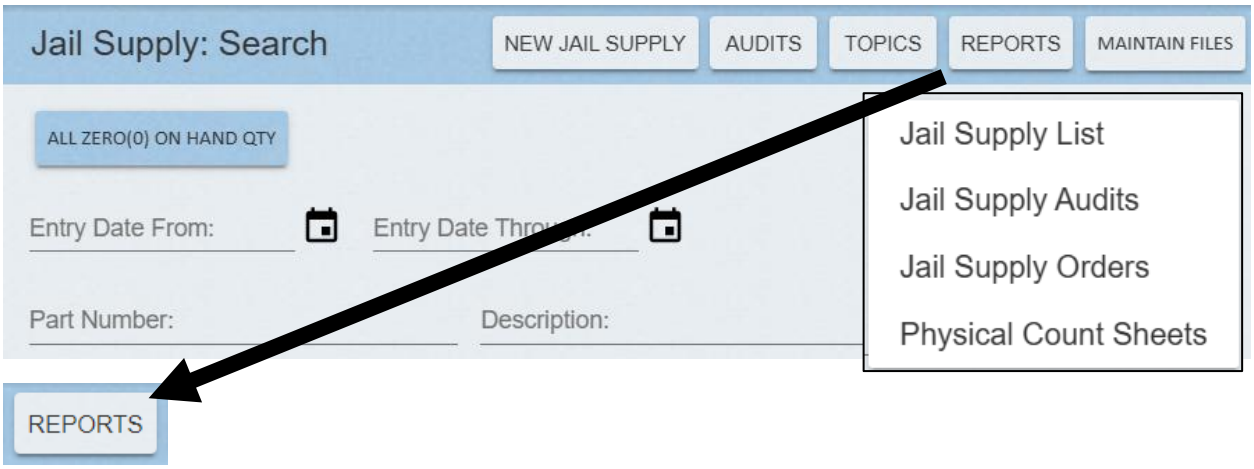
iSOMS has the capability to allow you to print different types of reports for jail supply records.

To access the reports, begin on the iSOMS home screen. Navigate to:

Corrections → Administrative → Warehouse Inventory

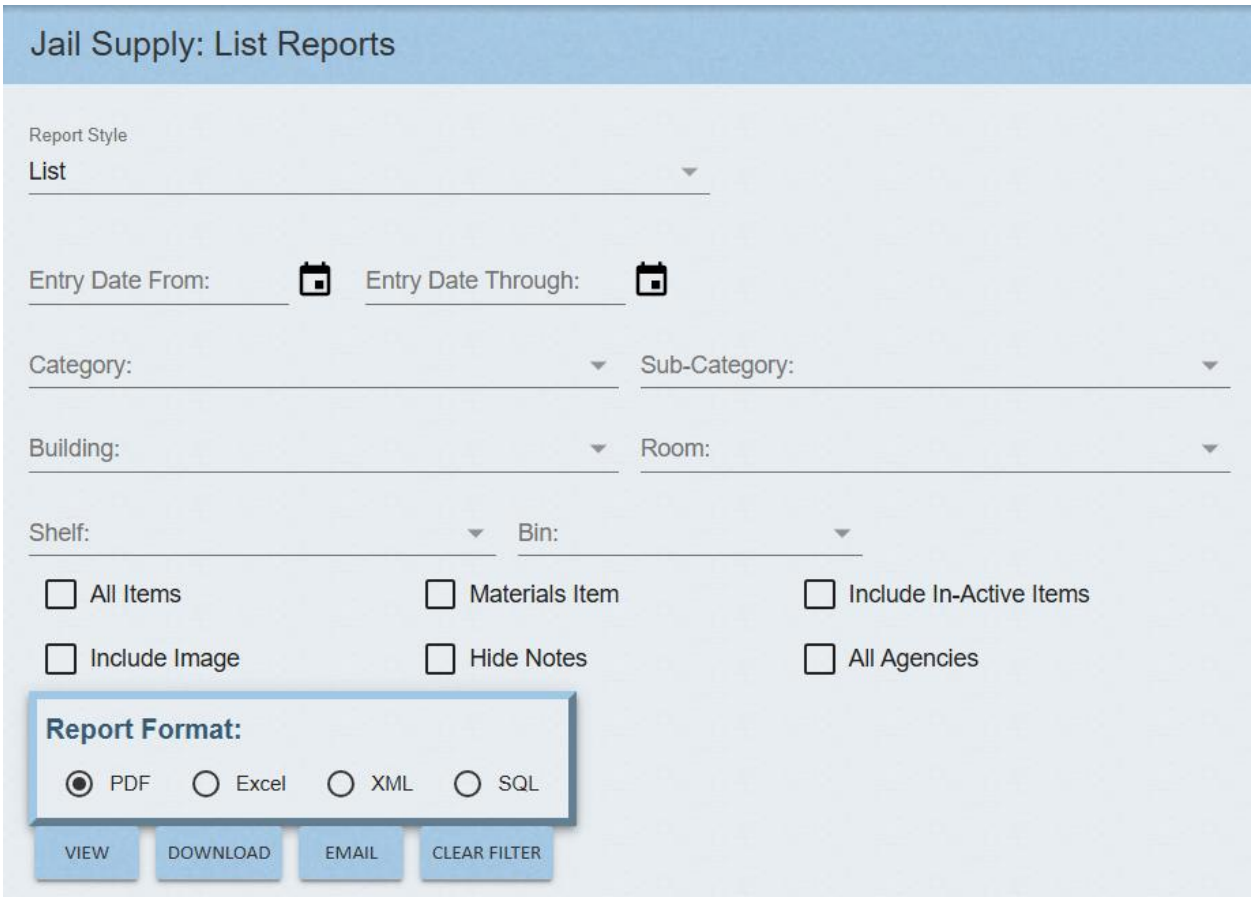


Now click on the **Reports** button in the upper right corner and select the report you wish to run. Different reports are explained over the next set of pages.

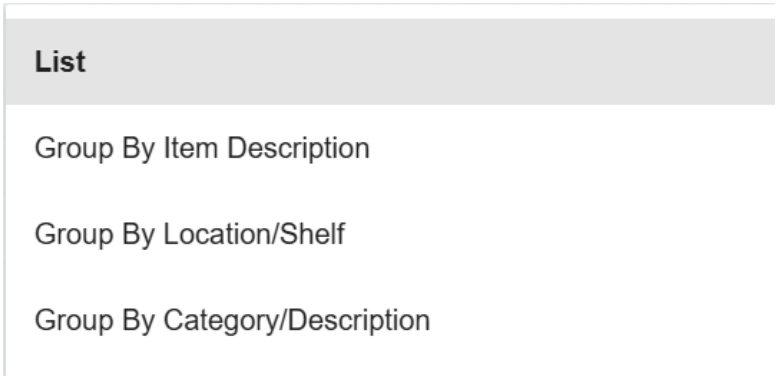


List Reports

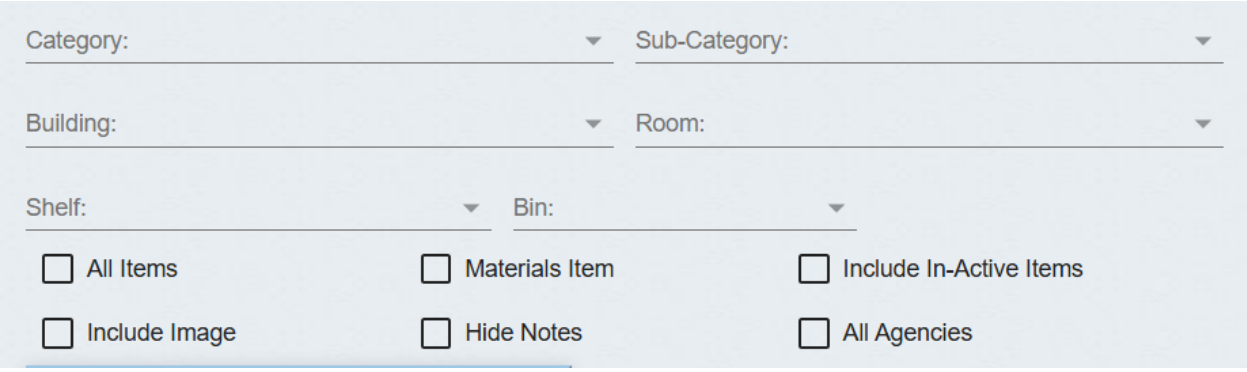
This report displays jail supply records in iSOMS over a certain date range. In this way you can see an overview of jail supply records over your chosen time period. Add the entry dates in **Entry Date From** and **Entry Date Through**.



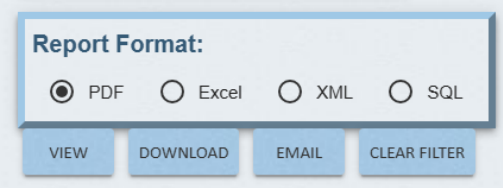
Report Style has a few different layout and sorting options, such as *List, Group by Item Description, Group by Location/Shelf,* and *Group by Category/Description*. Pick the one most relevant to your desired result.



You can add certain filters to reduce the list if desired. Also choose if you would like to show only material items, if you want to include inactive items, if you want to include images, and if you want to hide notes.



Now, with your chosen parameters, click **View** or **Download** to view the report.



List Report

Jail Supply Item List

YOUR AGENCY

Page 1 of 1

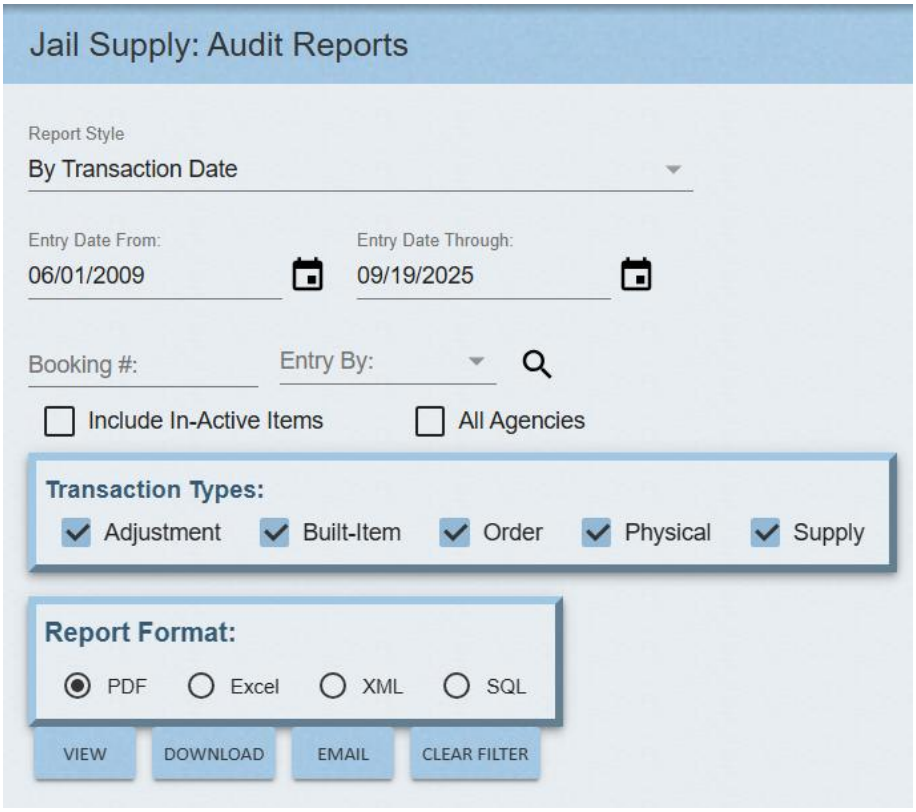
Item #	Item Description	Room/Location	Shelf	Bin	On Hand
					0
00002	THE ITEM	POD 1 SECURE SECTION			50
00003	MY ITEM	RACK 1 - FLOOR			20
001	TOOTH BRUSH	RACK 1 - SHELF A			84

Count: **4**

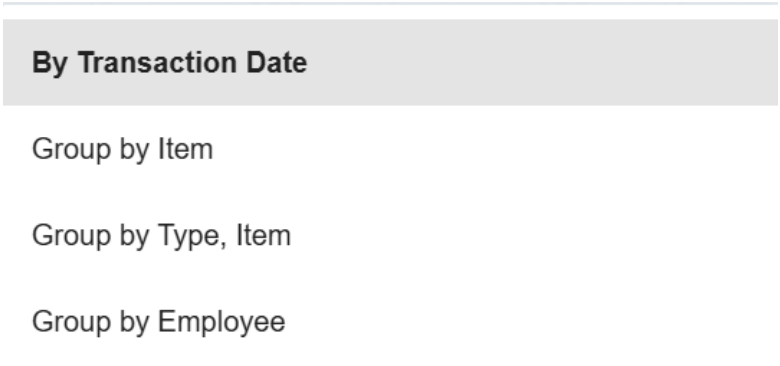
Audit Reports

This report lists all transaction dates for items in a chosen date range.

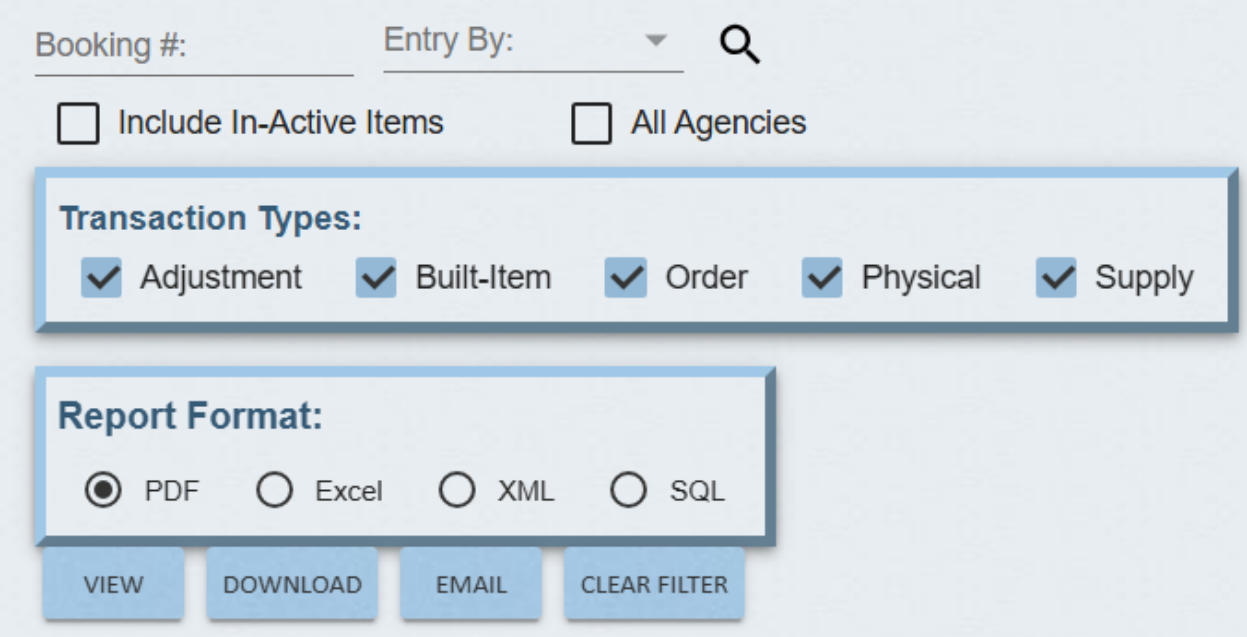
Add the entry dates in **Entry Date From** and **Entry Date Through**.



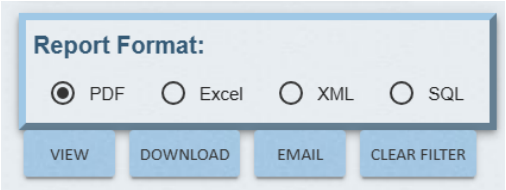
Report Style has a few different layout and sorting options, such as *By Transaction Date, Group by Item, Group by Type / Item,* or *Group by Employee*. Pick the one most relevant to your desired result.



You can add certain filters to reduce the list if desired. Also choose if you would like to show only certain transaction items.



Now, with your chosen parameters, click **View** or **Download** to view the report.



Jail Supply Transaction Audit List (By Employee)

YOUR AGENCY

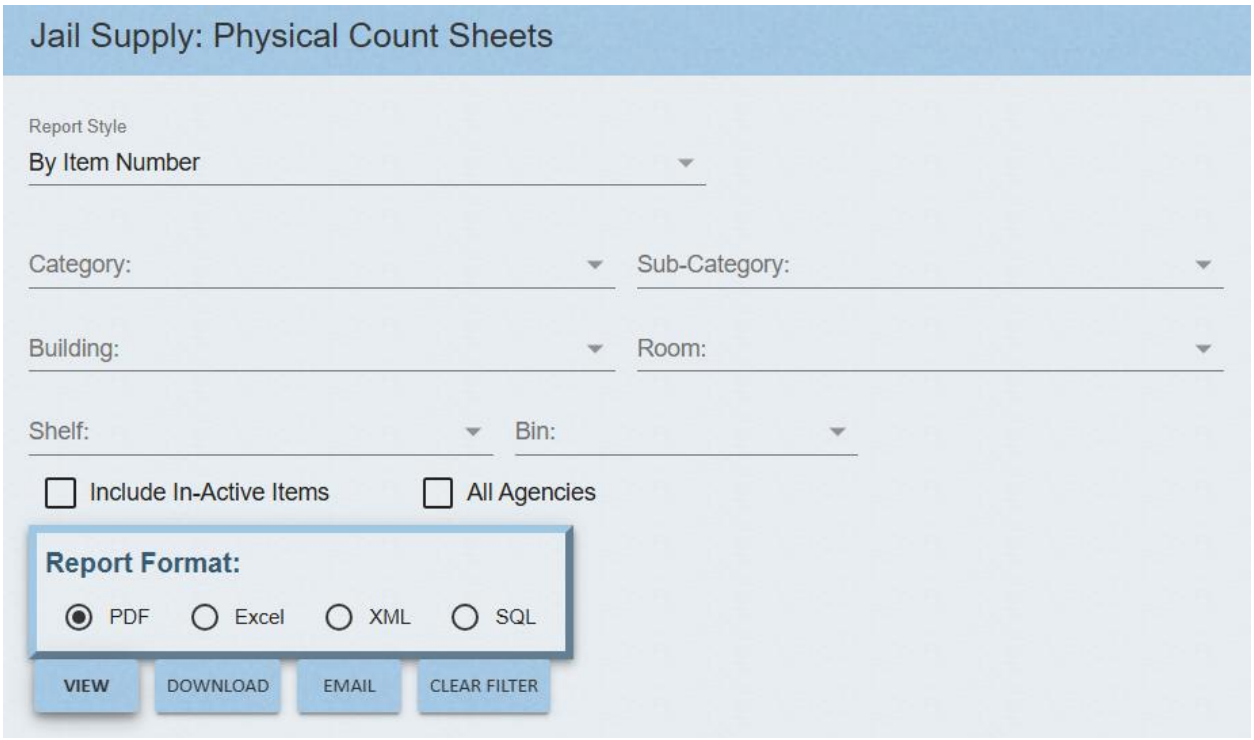
Page 1 of 2

ELDER, MARTIN

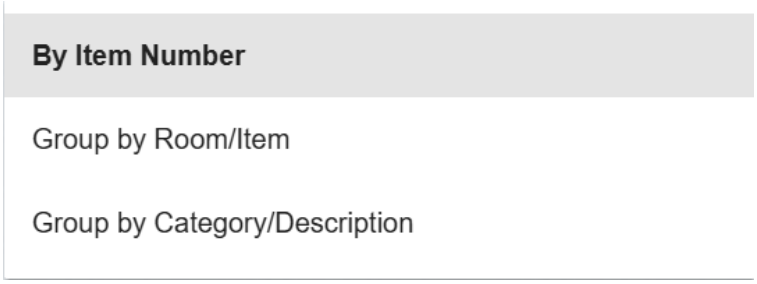
Item #	Item Description	Transaction Date	Entry By	Type	Quantity
00002	THE ITEM	04/01/2017 08:04	MWELDER	PHYSICAL	0
00002	THE ITEM	04/01/2017 08:04	MWELDER	SUPPLY	0
00002	THE ITEM	04/01/2017 08:04	MWELDER	SUPPLY	0
00003	MY ITEM	03/31/2017 11:05	MWELDER	PHYSICAL	0
001	TOOTH BRUSH	12/28/2009 00:00	MWELDER	SUPPLY	0
001	TOOTH BRUSH	12/28/2009 00:00	MWELDER	SUPPLY	0
001	TOOTH BRUSH	10/20/2015 14:31	MWELDER	SUPPLY	0
001	TOOTH BRUSH	10/20/2015 14:31	MWELDER	SUPPLY	0
001	TOOTH BRUSH	10/20/2015 14:33	MWELDER	PHYSICAL	0

Physical Count Sheets Reports

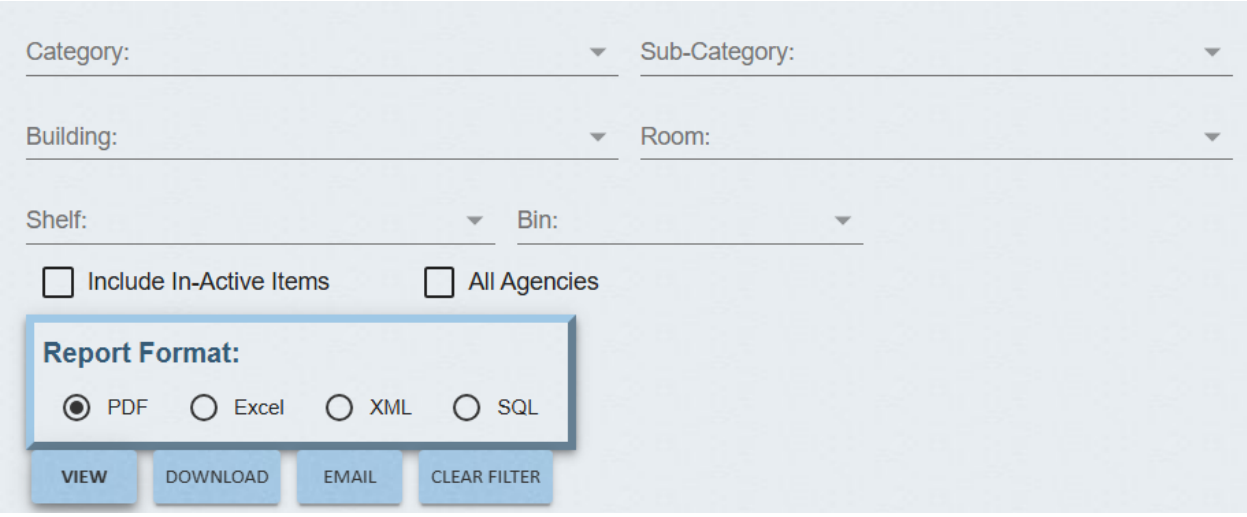
This report is designed so you can print it to verify physical counts of items. You will see the amount iSOMS says you have on hand, and you will have a place to write down how many you actually have of the item.



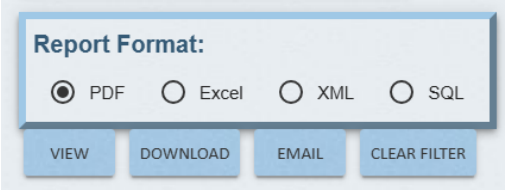
Report Style has many different layout and sorting options, based on the details you'd like on the report. Pick the one most relevant to your desired result.



You can add certain filters to reduce the list if desired. Also choose if you would like to include inactive items on the report.



Now, with your chosen parameters, click **View** or **Download** to view the report.



Jail Supply Physical Count Sheet

YOUR AGENCY

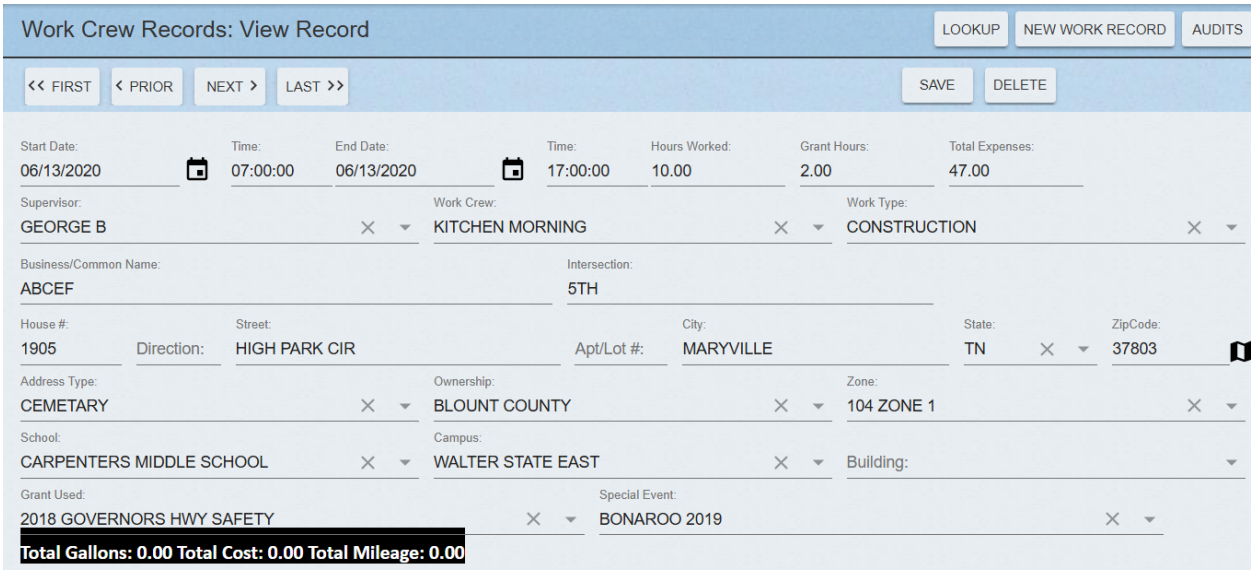
Page 1 of 1

Item #	Item Description	Room/Location	Shelf	Bin	On Hand	Count
					0	
00002	THE ITEM	POD 1 SECURE SECTION			50	
00003	MY ITEM	RACK 1 - FLOOR			20	
001	TOOTH BRUSH	RACK 1 - SHELF A			84	

Count: **4**

Work Crews

The **Work Crews** module allows you to track work crews. You can record supervisors, work types, inmates involved, officers involved, expense logs, fuel logs, and more. This section will explain searching existing work crew records, creating a new work crew record, filling out a work crew record, and running reports for the module.



The first part of this section explains searches. If you need explanations on an already existing record, see the *Filling Out a Work Crew Record* to get more information on the different fields and tabs available.

Searching for Existing Work Crew Records

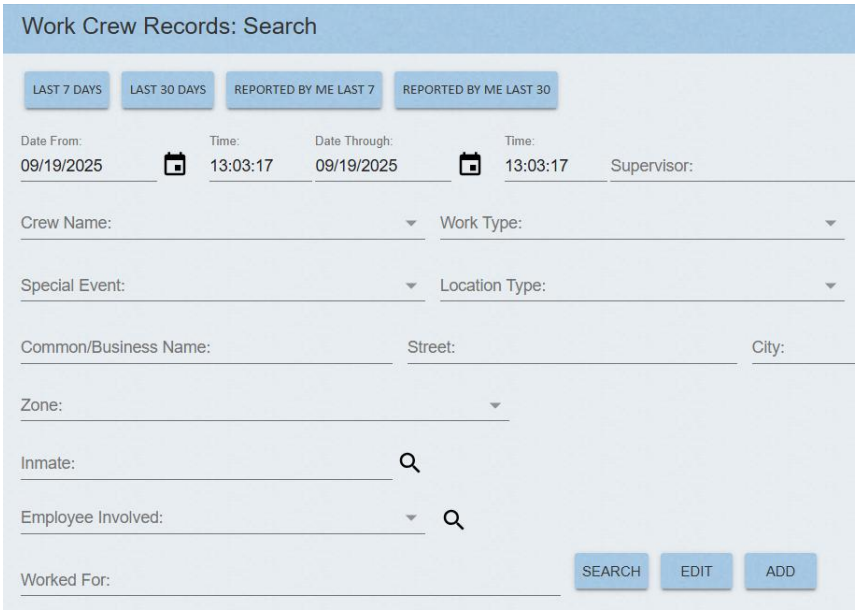
To search existing records, begin on the iSOMS home screen.

Navigate to:

Corrections → Administrative → Community Service



This will open the **Work Crew Records: Search** screen. Here you can search and filter for different work crew records. You can either use the blue buttons to do *quick searches* or enter information in the fields to do *standard searches.*

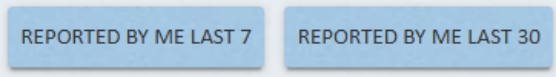


Quick Searches

A few different quick searches are available by using the blue buttons.



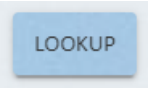
Last 7 Days and **Last 30 Days** will show you all the records added in the specified recent time periods.

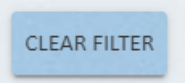


Reported by Me Last 7 and **Reported by Me Last 30** will show you records added by you in the specified recent time periods.

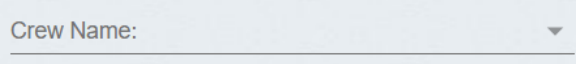
Standard Searches

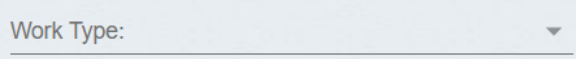
Various fields are available if you need to do a search that the quick searches won't work for. Fill in the fields to narrow the search and click **Lookup** at the top or bottom of the page to perform the search. If you need to start over, simply click **Clear Filter** to remove all search field entries.

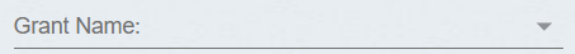


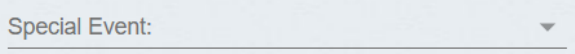


Selected Field Explanations



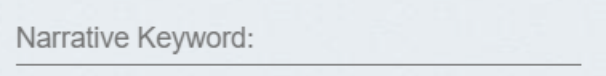






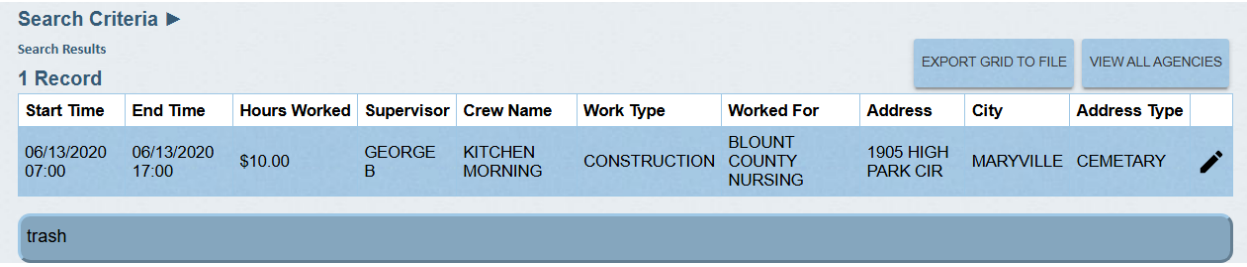
These fields let you search for work crew records based on different categorizations. All of them can be edited in Maintain Files to add additional options for the dropdowns.

Work Type allows you to sort based on the type of work being performed. **Special Event** is used to classify work crews being used for special events or programs, such as cleanup for state fairs or the like.



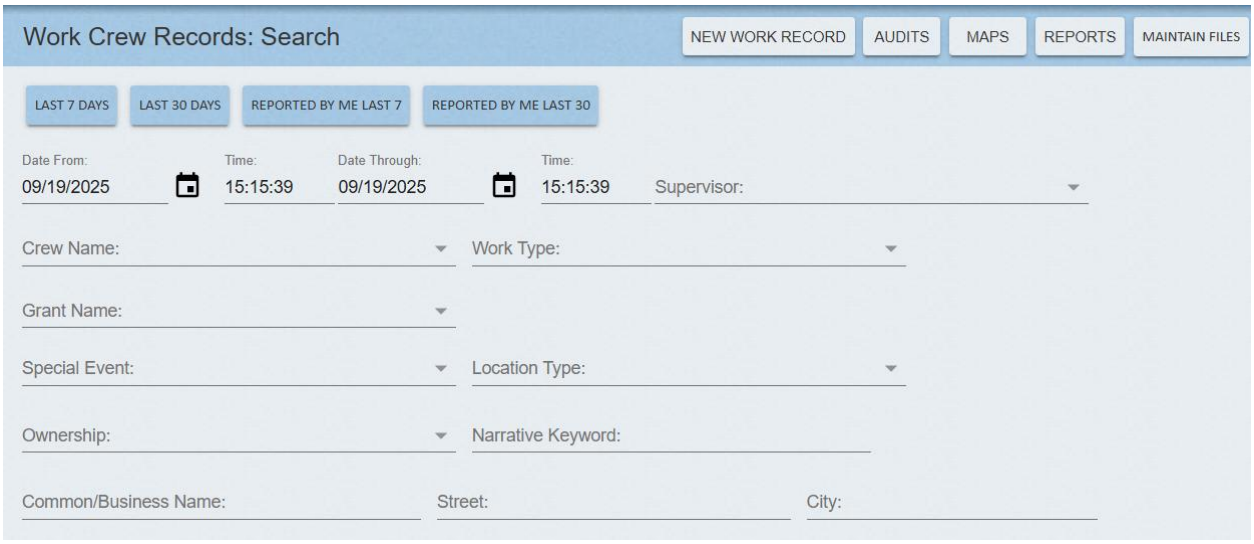
The **Narrative Keyword** field lets you search for words in the narrative of records.

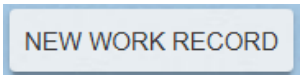
As mentioned above, when you have finished with your search parameters, click **Lookup** to perform your search. Double click on the desired entry to view or edit the record.



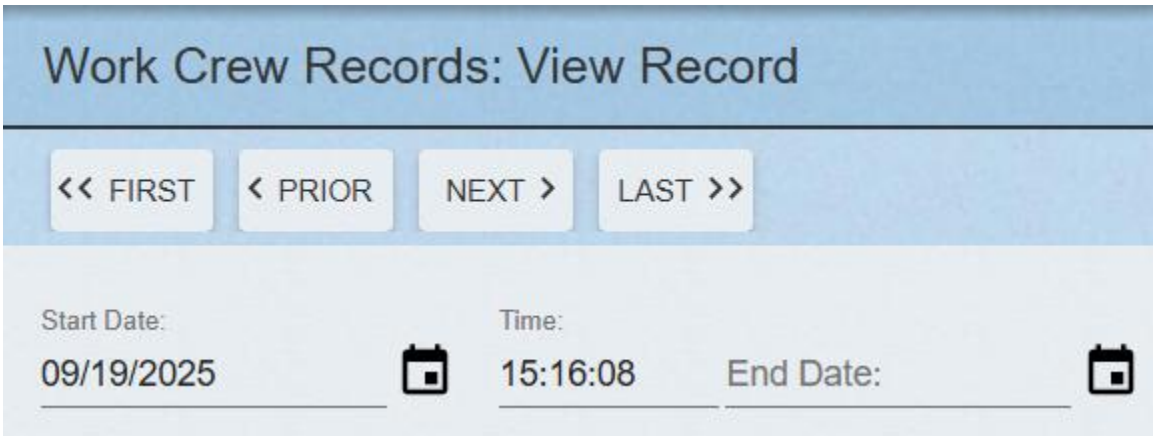
Creating a New Work Crew Record

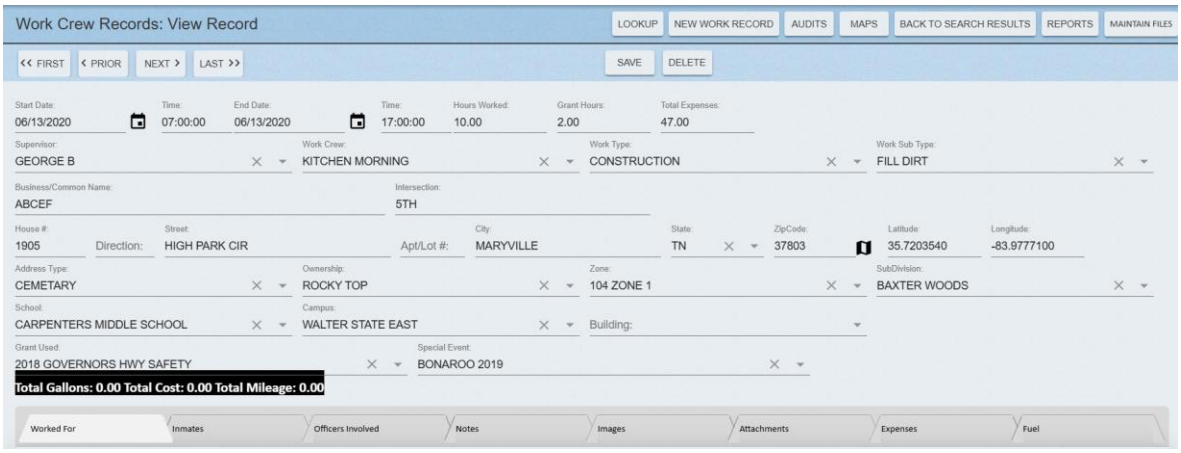
To create a new work crew record, click **New Work Record** in the upper right corner of the Work Crew search screen:





Confirm you want to make a new record. This will create and open the new record.

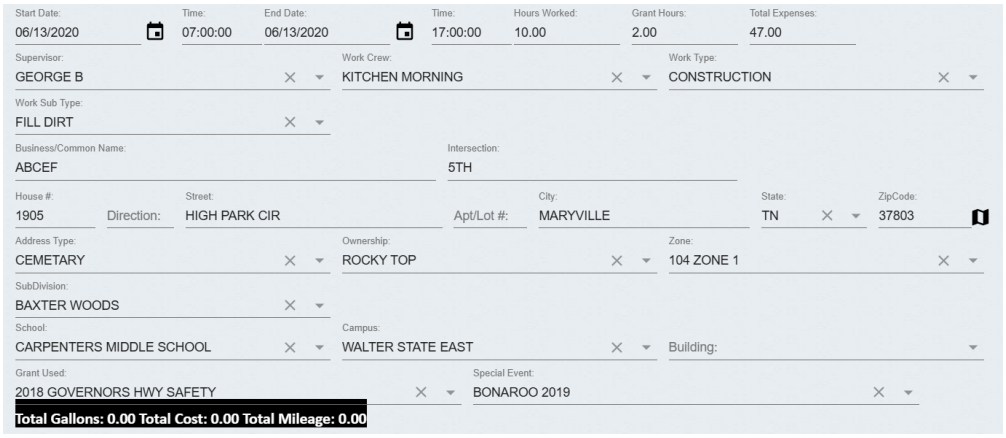




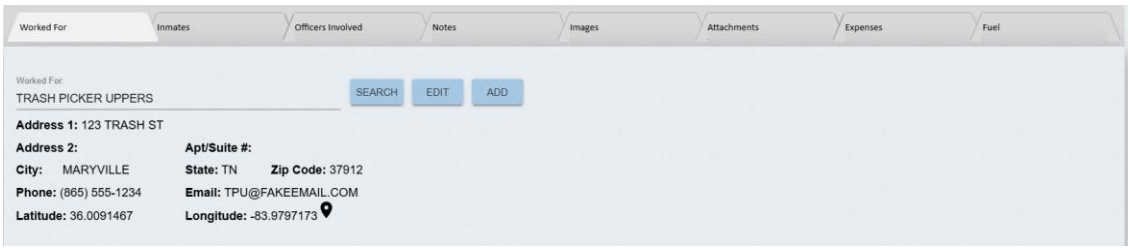
You will fill out the fields and then the tabs as needed. Work Crew records are designed to record info on one job, so record the hours worked on the job. If multiple separate jobs are done at different locations by the same crew, you will typically make multiple records.

There are two primary sections of the record:

1. The *fields* in the upper part of the screen. These record details about the supervisor, work type, hours worked, and location for work.



2. The *tabs* record information about the company worked for, inmates, officers, notes, images, attachments, expenses, and fuel expenses.

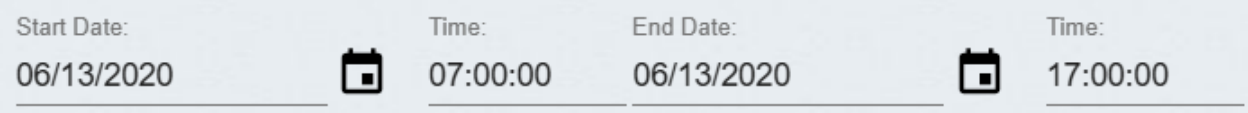


After you enter new details, make sure to click **Save** at the top of the screen.

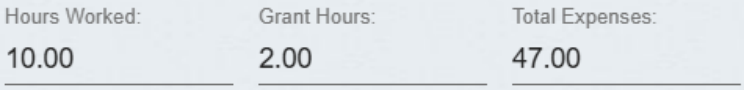
Filling Out a Work Crew Record – Fields

This section explains in detail the different fields and tabs for a work crew record. The top section of the report with fields should always be filled out when relevant information is available, and the tabs should be filled out as needed.

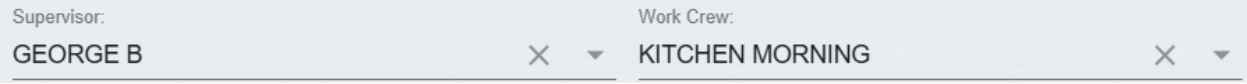
Fields



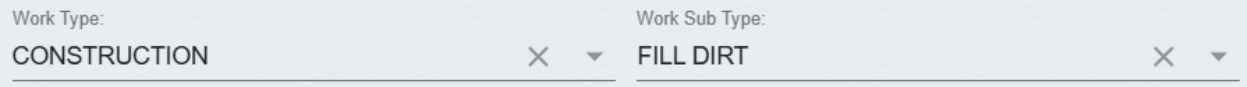
These fields tell the start and end of the work. Add **Start Date** and **Time** and, if the work is already completed or has a definite end date, **End Date** and **Time.**



These fields record hours and expenses. Add the **Hours Worked,** the amount of hours sponsored by grant in **Grant Hours**, and the **Total Expenses** for the work. Note that **Total Expenses** is *not* calculated automatically from the **Expenses** tab – this field is a manual entry.

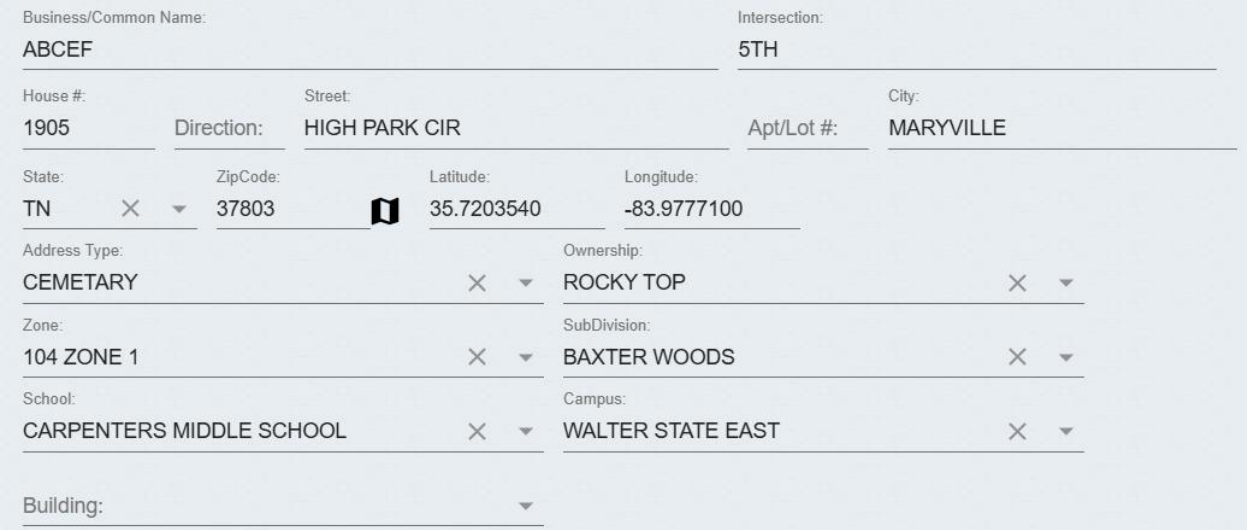


Next, add the **Supervisor** and the name of the **Work Crew**.

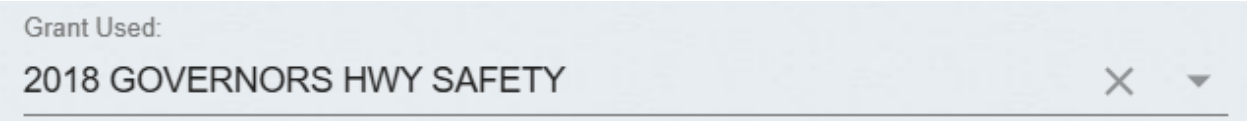


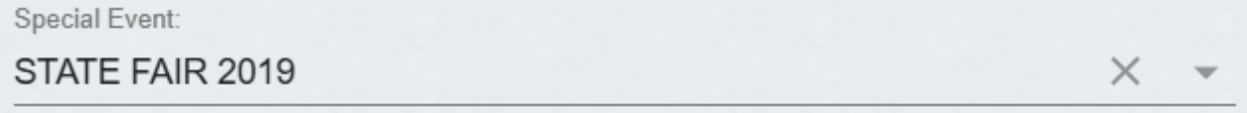
Now add the **Work Type** (such as *Construction, Litter Pickup*, *Maintenance, Mowing, etc.*) and **Work Sub Type** (such as *Fill Dirt, Gravel, Weed Eat, etc.*)

Continued on the next page



All of these fields relate to the location of the work.

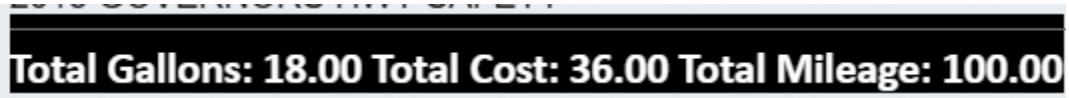




Grant Used records what grant was used or applied to fund the work crew.

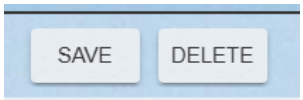
Special Event records if the work was done for a special event, such as a state fair.

You will also see gallons and fuel information, which will be sourced from the **Fuel** tab, as well as Total Cost, which is the sum of all expenses in both the **Fuel** tab and the **Expenses** tab:



Remember to hit **Save** at the top of the screen often as you fill out the record to avoid losing information.

***Save** is located at the top of the screen.*



Filling Out a Work Crew Record – Tabs

Summary

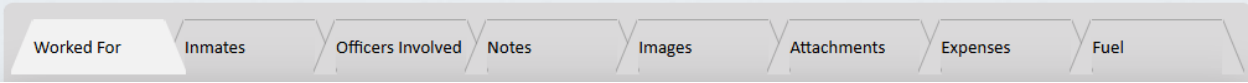
Fill out the tabs below the fields as needed.

The **Worked For** tab lets you record the business / organization for the work crew.

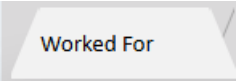
Inmates and **Officers Involved** let you record inmates working and employees supervising/present, respectively.

Notes, **Images**, and **Attachments** tabs are available if you need to take additional notes or upload images and documents.

Expenses lets you record the expenses involved in this work done, and **Fuel** lets you record the fuel used and expenses related.

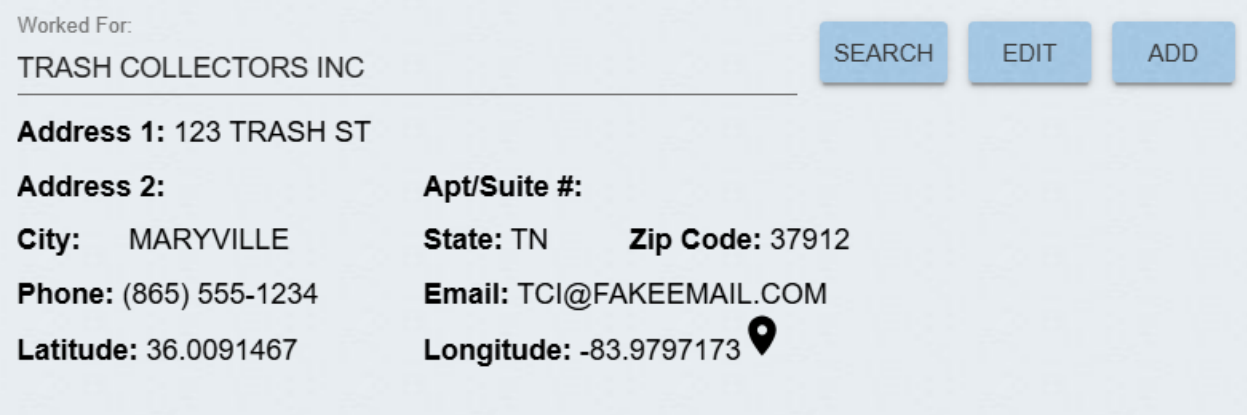


Worked For Tab

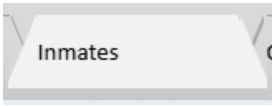


The **Worked For** tab contains information on the business or organization where the work is being done or who the work is being done for.

If you already have the business in your records, simply type the name (such as **TRASH COLLECTORS INC**) and it will appear automatically. If you don't have the business in iSOMS or for more information on inputting new organizations into iSOMS for quick reference later, see *Appendix C, Business / Organization Records* on page 728.



Inmates Tab



The **Inmates** tab lists the inmates on the work crew (and their job if you add it).

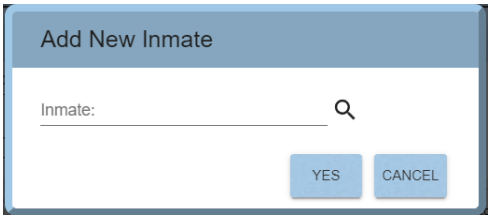
To view, edit, or delete a current entry, double-click an entry or click the view ( ) icon.



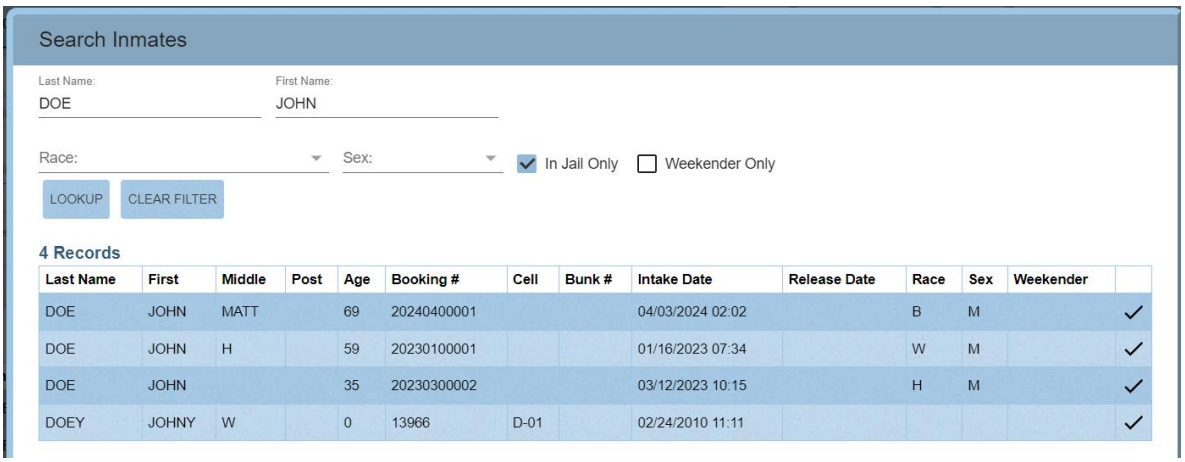
To add a new entry, click **Add Inmate**.



Click the magnifying glass ( ) icon to search for an inmate.



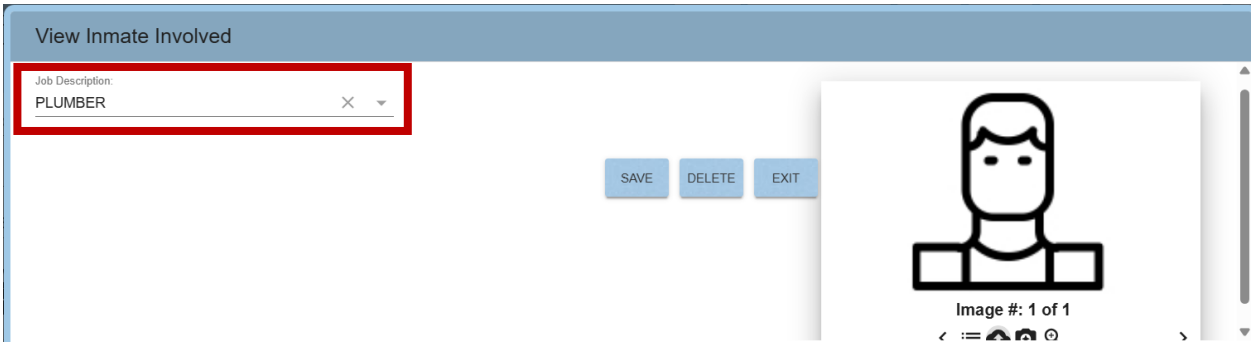
Enter relevant name or identifying info and then click **Lookup**. Double-click the inmate you want to add or click the *checkmark* symbol. Afterwards, click **Yes** to add the inmate.



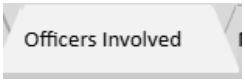
To add the job description of the inmate, simply click the view ( ) icon to edit the inmate.

You will see a picture of the inmate (if any, from booking) and you can add **Job Description.**

As usual, Super Users can add additional options to this dropdown if needed.

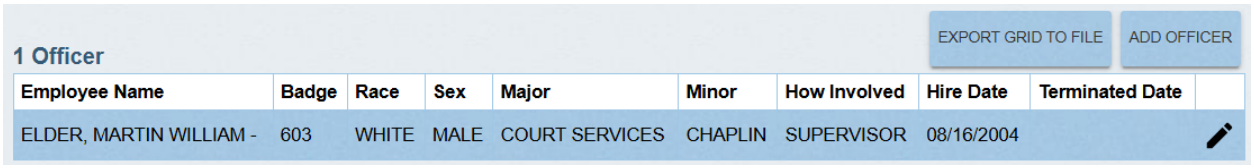


Officers Involved Tab

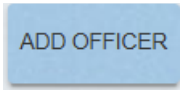


The **Officers Involved** tab lists the officers involved and why they are involved (if added).

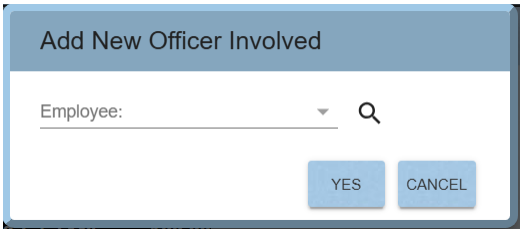
To view, edit, or delete a current entry, double-click an entry or click the pencil ( ) icon.



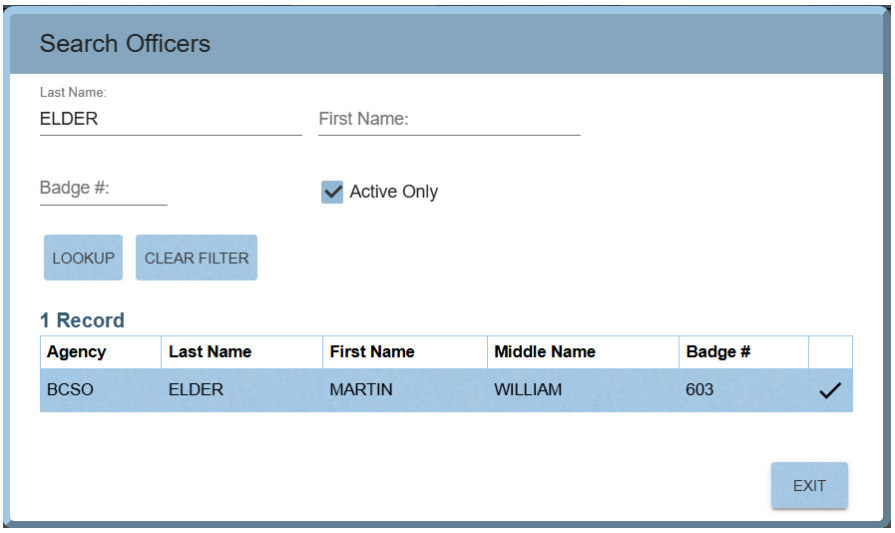
To add a new entry, click **Add Officer**.



Click the magnifying glass ( ) icon to search for an officer, or type the name to autofill.



Enter relevant name or badge number and then click **Lookup**. Double-click the officer you want to add or click the *checkmark* symbol. Afterwards, click **Yes** to add the officer.



To add the *How Involved* for the officer, simply click the pencil ( ) icon to edit the officer.

You will see a picture of the officer, and you can add **How Involved.**

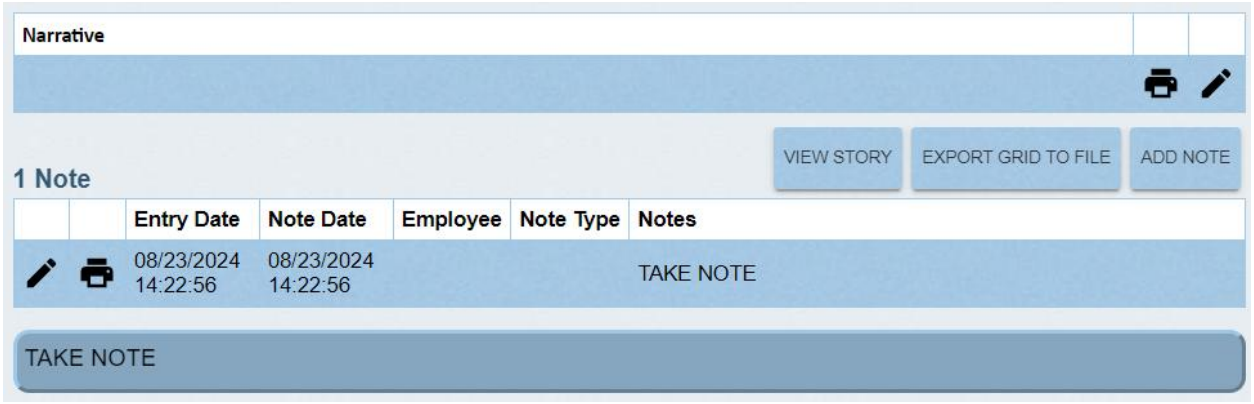
As usual, Super Users can add additional options to this dropdown if needed.



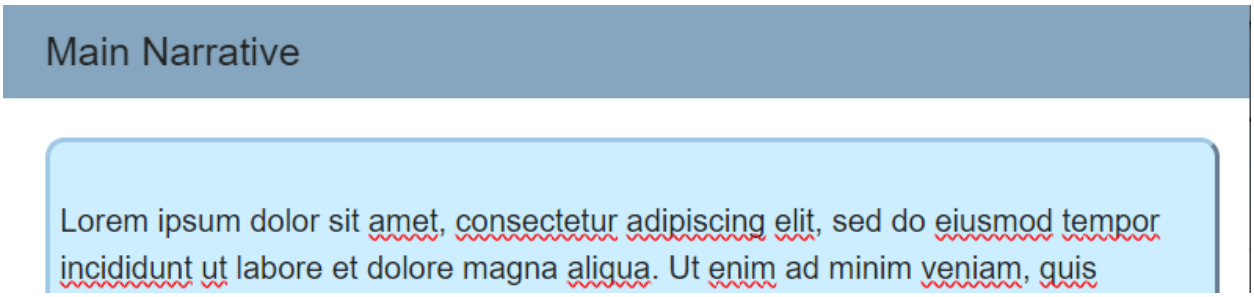
Notes Tab



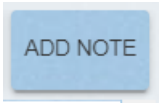
The **Notes** tab is used to view or add notes pertinent to the record. Double-click on any entry in the table to edit or view it.

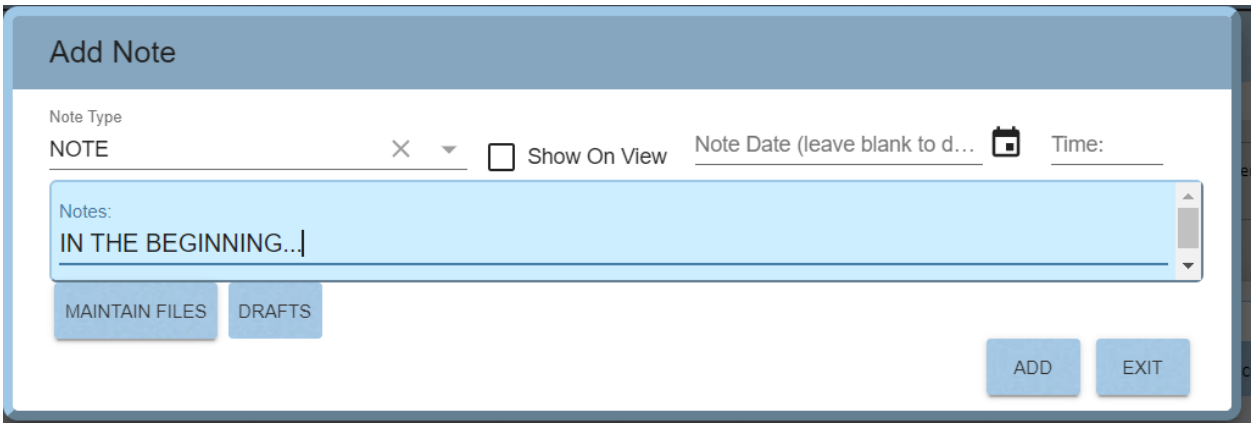


Narrative acts as an area where you can add a long note. This is useful when you want to add important or long form notes that won't be mixed in with the rest of the short notes.



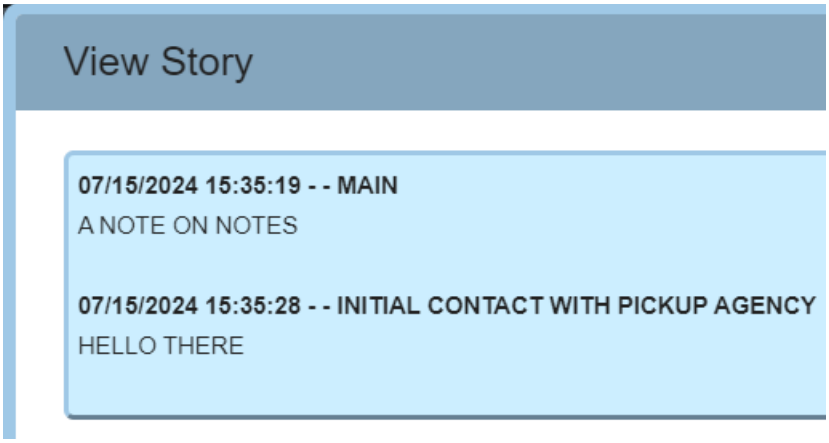
Use **Add Note** to add a new note.





The **View Story** button will show all notes (except Narrative) that have been added on one page.





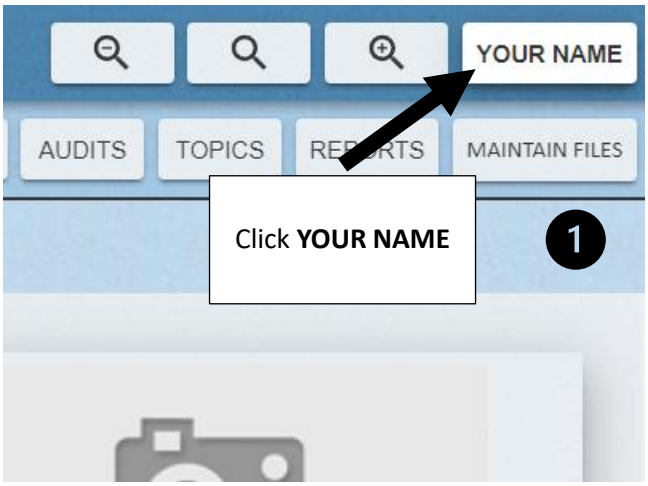
Images Tab

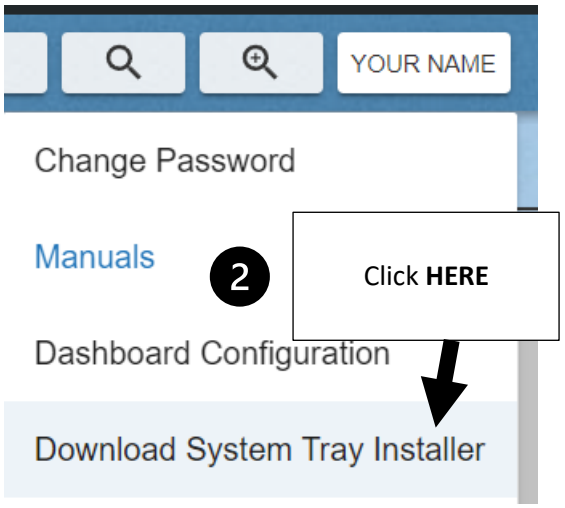


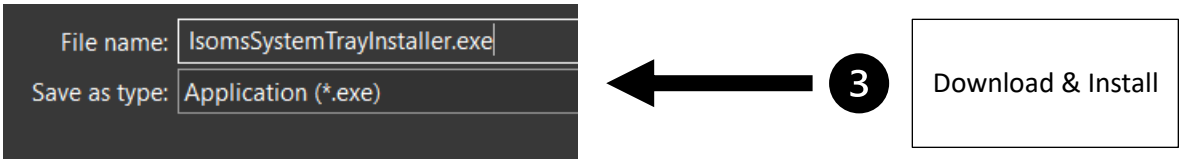
The **Images** tab is used to view, download, or add images. You can add a single image at a time or multiple images at a time. Click **Add Image** to add a single image.



To add multiple images at a time, you will need the System Tray Installer downloaded to the computer you are using. The System Tray Installer can be found on the iSOMS home page by clicking on the button in the upper right with your username. Once you click on that, you will get a drop-down list, and **Download System Tray Installer** is one of the options. Download and install it on this computer.

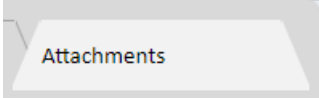




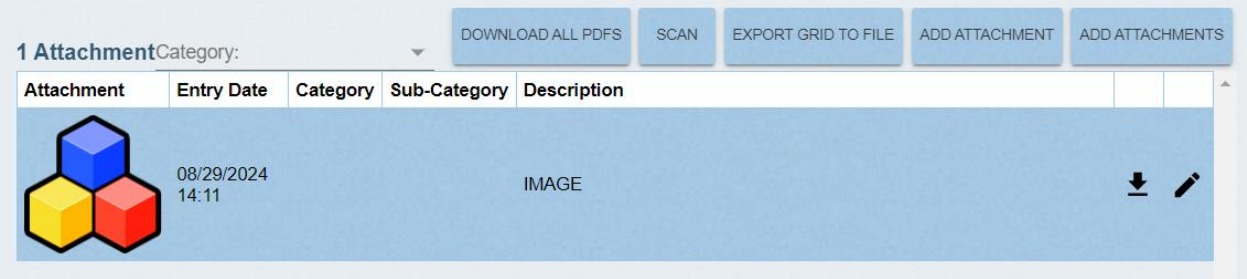


After you have the System Tray Installer on the computer, you can now use the **Add Images** button to upload multiple images at once if necessary.

Attachments Tab



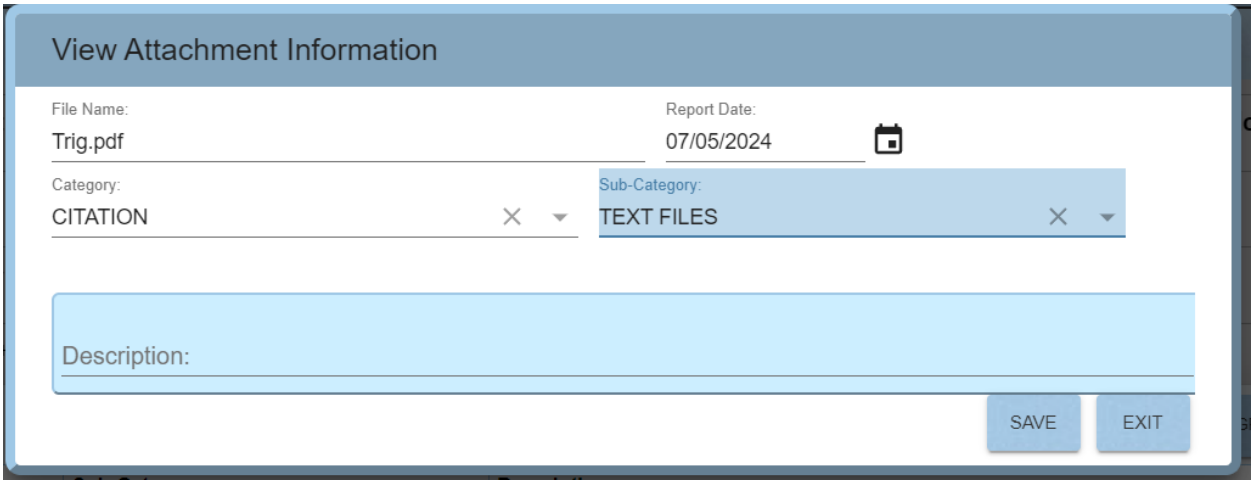
The **Attachments** tab is used to view, download, or add attachments. Double-click a file entry to view the record for the attachment or click on the icon to download the attachment to the computer.



You can add a single attachment at a time or multiple attachments at a time. Just like above with images, you will need the System Tray Installer downloaded to the computer you are using to add multiple attachments at once. See the *Image* tab instructions on the previous few pages for instructions on installing the System Tray Installer.

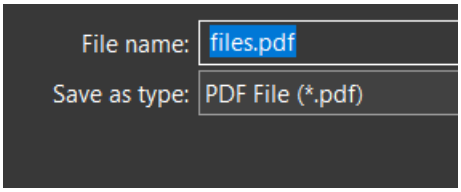
Click **Add Attachment** to add a single attachment or click **Add Attachments** to add multiple attachments at the same time. Choose the attachments from the computer, then add the appropriate category and sub-category for the file.



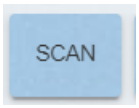


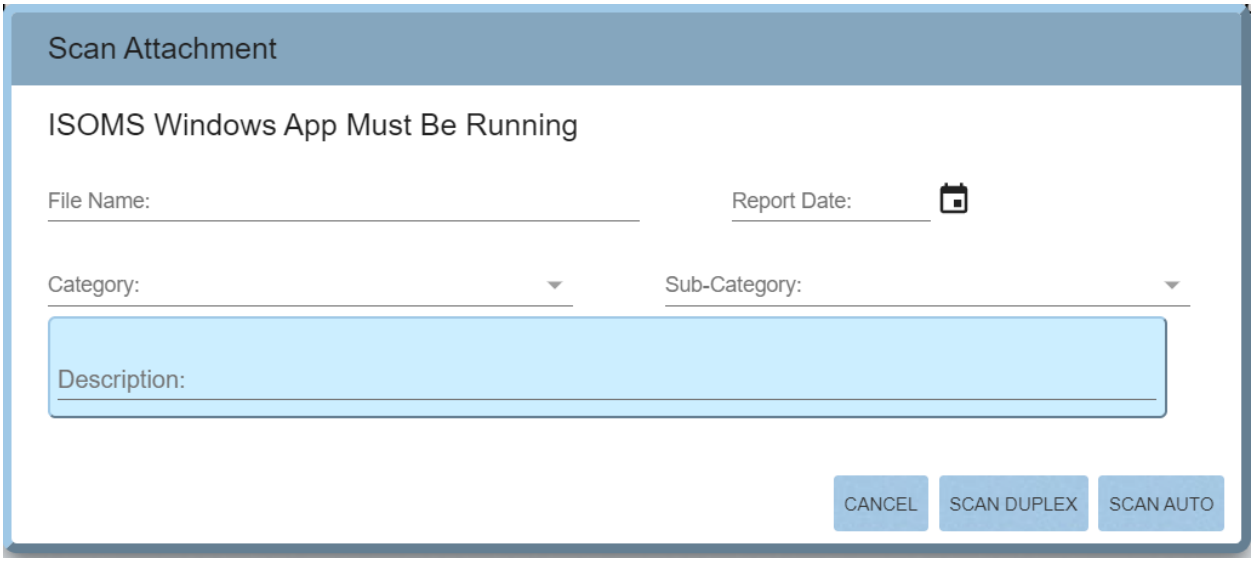
You can also **Download All PDFs** at once by clicking the appropriate button.



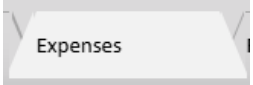


If you have the iSOMS Windows App, you can use **Scan** to scan files into the attachments.



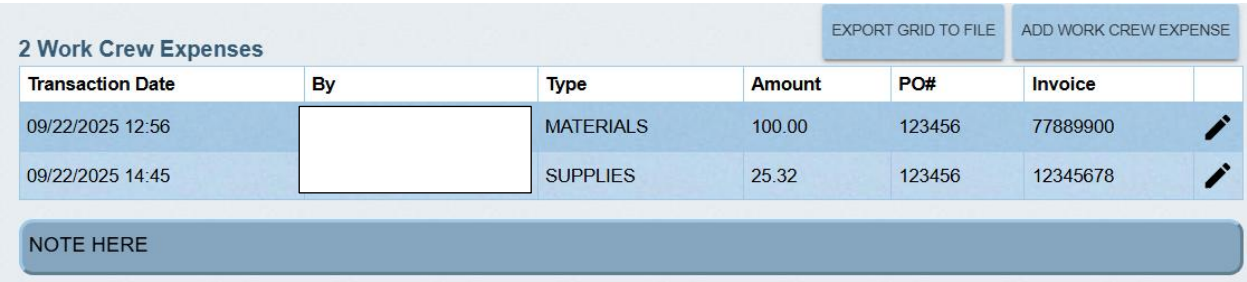


Expenses Tab

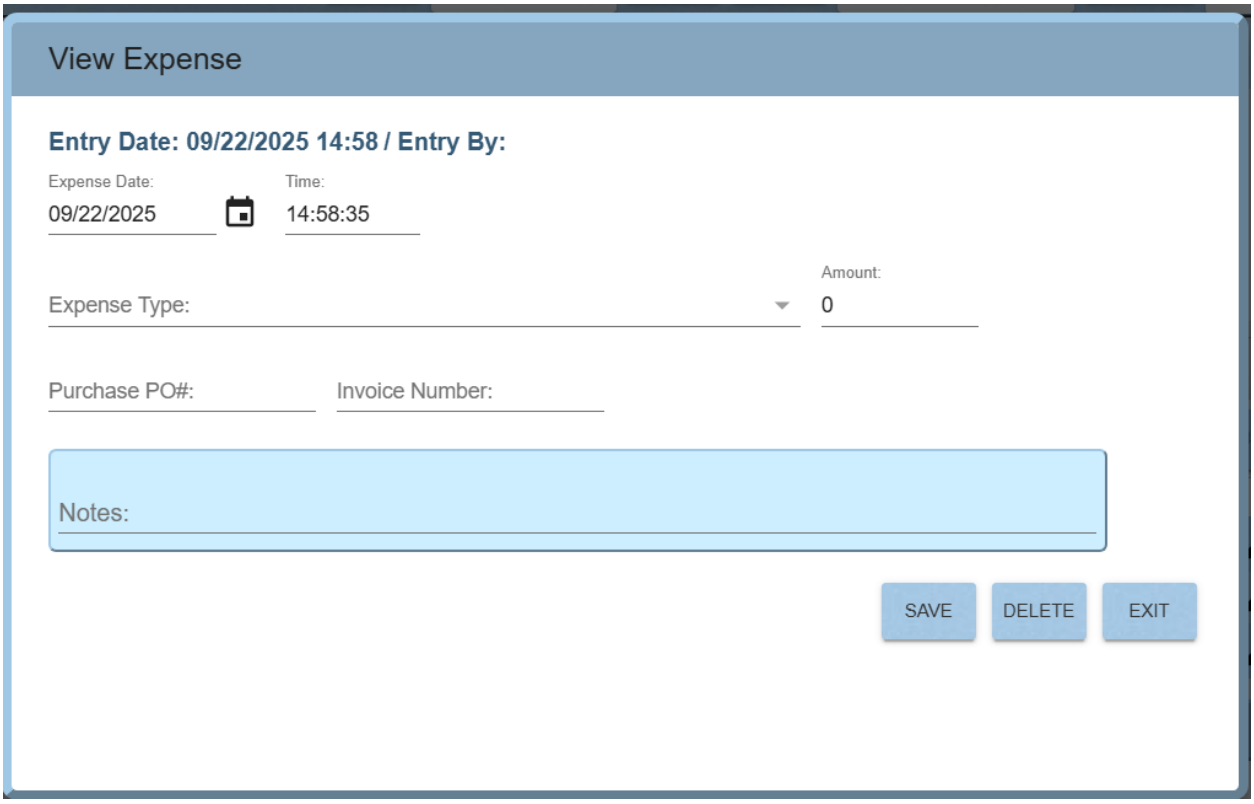


The **Expenses** tab allows you to track expenses for the work crew (except for Fuel expenses, which should be put in the Fuel tab instead).

To view, edit, or delete a current entry, double-click an entry or click the pencil ( ) icon.



To add a new entry, click **Add Work Crew Expense**.



First, if the expense needs a different date or time, change the auto-filled **Expense Date** and **Time**:



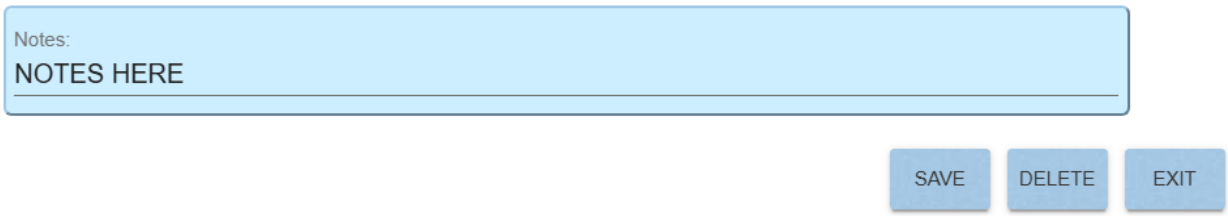
Add the **Expense Type** and the dollar **Amount**:



If needed, add the **Purchase PO#** and **Invoice Number:**

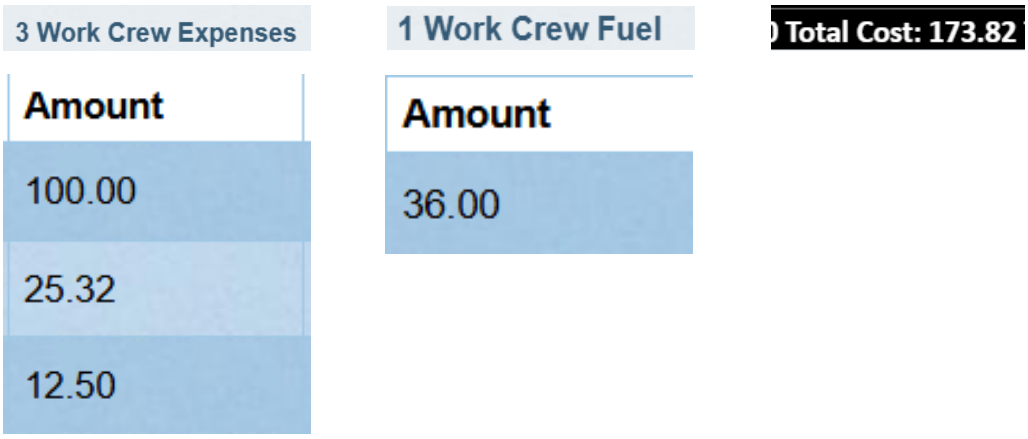


Finally, add any desired **Notes** and **Save.**



All of the expenses in this tab **PLUS** the fuel expenses in the *Fuel* tab will be summed and put as the **Total Cost** right above the tabs:

Example: $100 + $25.32 + $12.50 + $36 = **$173.82**

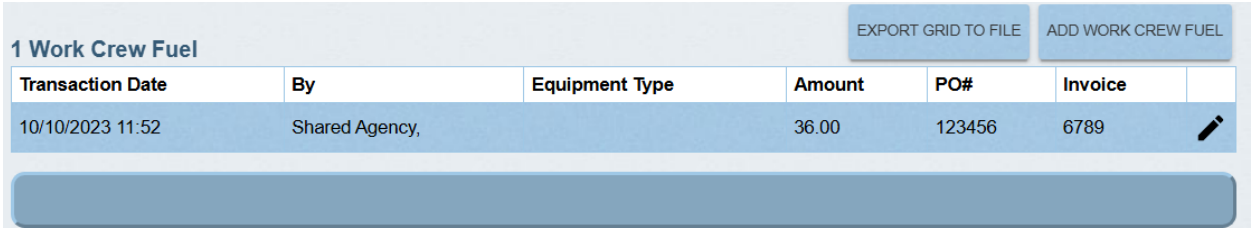


Fuel Tab

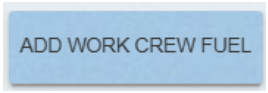


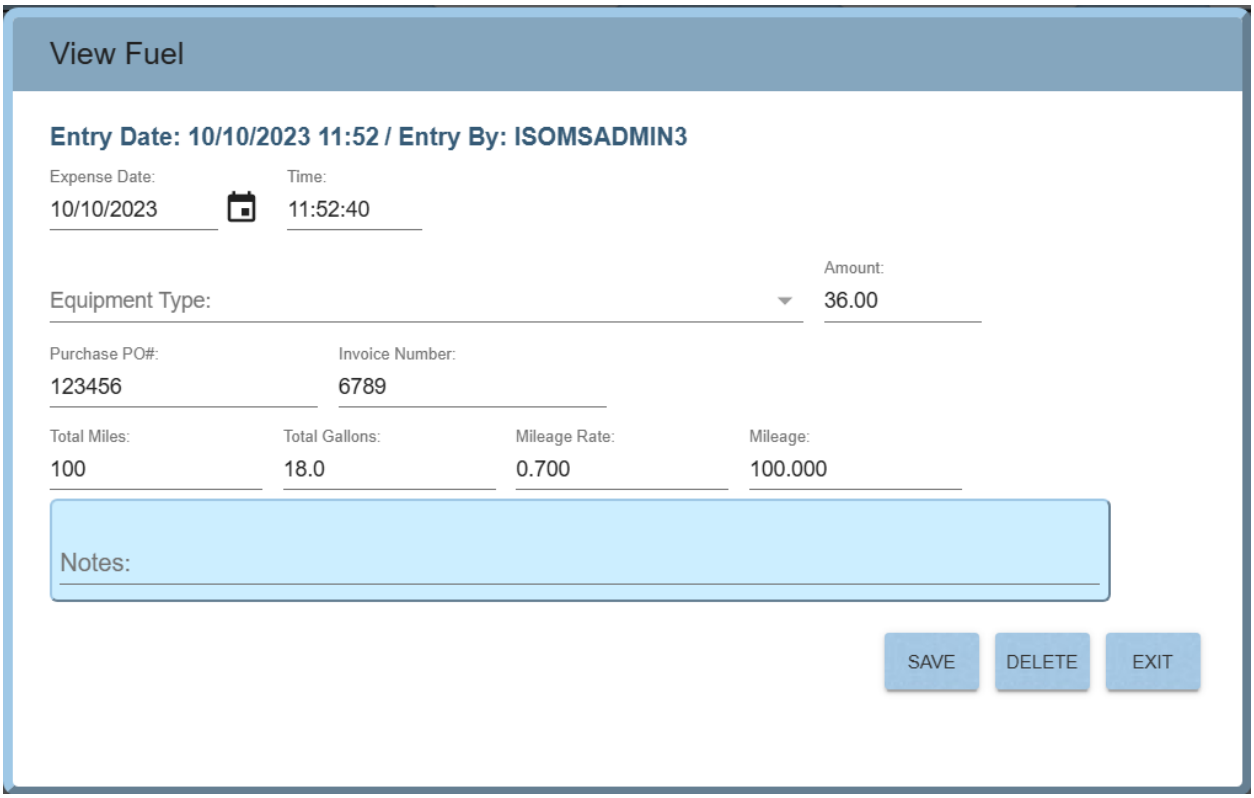
The **Fuel** tab allows you to track fuel expenses for the work crew (for other expenses, put them in the Expenses tab instead).

To view, edit, or delete a current entry, double-click an entry or click the pencil ( ) icon.



To add a new entry, click **Add Work Crew Fuel**.





Corrections Manual

First, if the expense needs a different date or time, change the auto-filled **Expense Date** and **Time**:



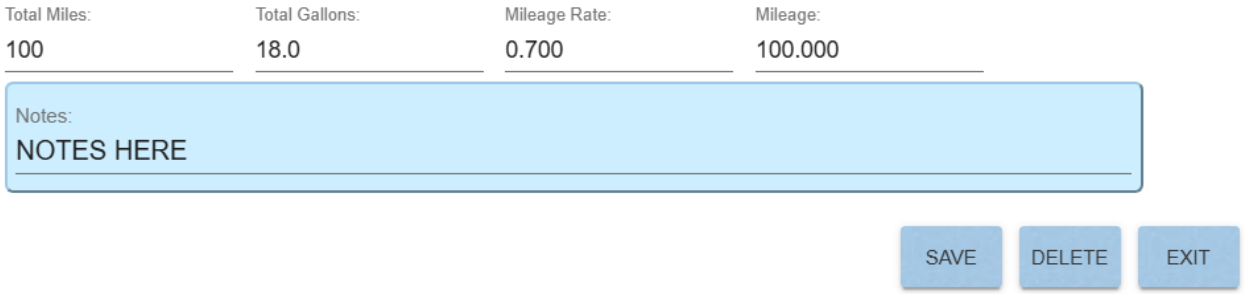
Add the **Equipment Type** and the dollar **Amount**:



If needed, add the **Purchase PO#** and **Invoice Number:**

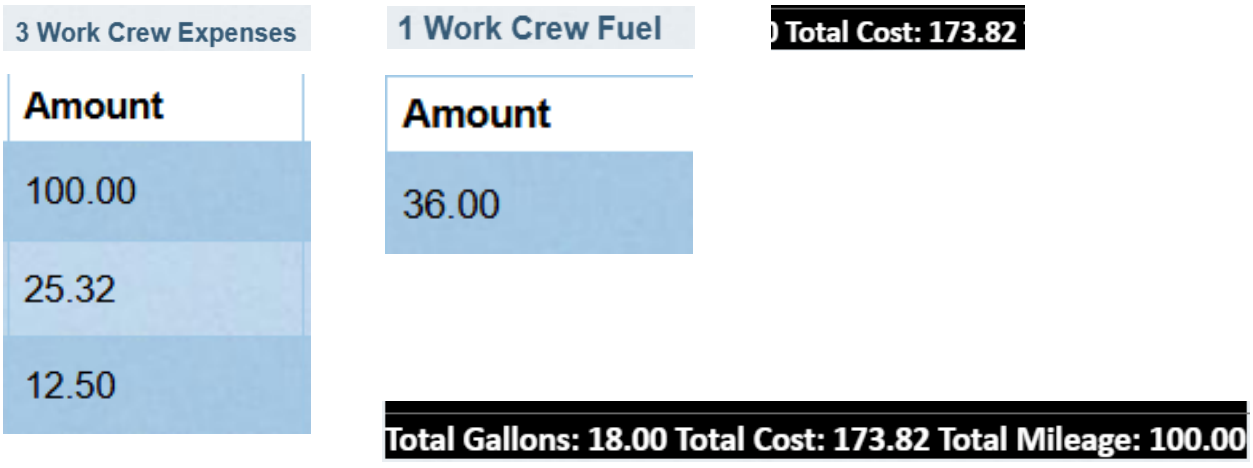


Add the **Total Miles, Total Gallons, Mileage Rate,** and **Mileage**. Finally, add any desired **Notes** and **Save.**



All of the expenses in this tab **PLUS** the fuel expenses in the *Fuel* tab will be summed and put as the **Total Cost** right above the tabs. The **Gallons** and **Total Mileage** will be listed as well.

Example: $100 + $25.32 + $12.50 + $36 = **$173.82**



Work Crew Reports

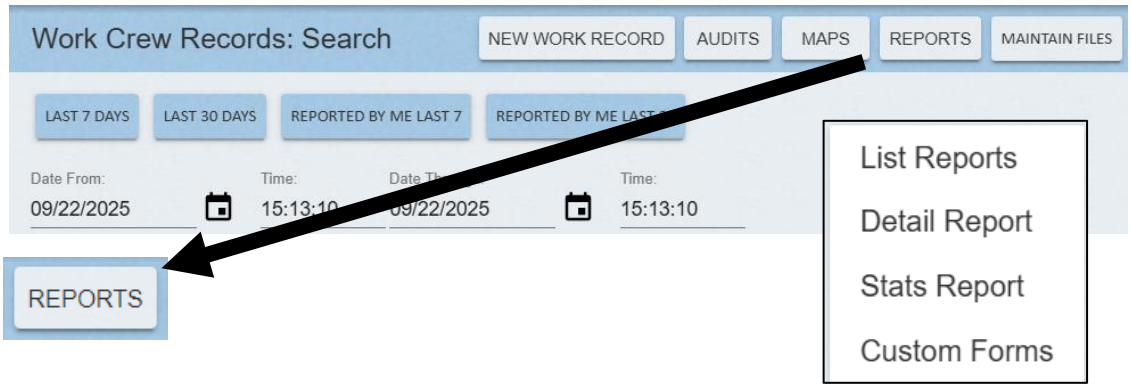
iSOMS has the capability to allow you to print different types of reports for work crew records.

To access the reports, begin on the iSOMS home screen. Navigate to:

Corrections → Administrative → Work Crews

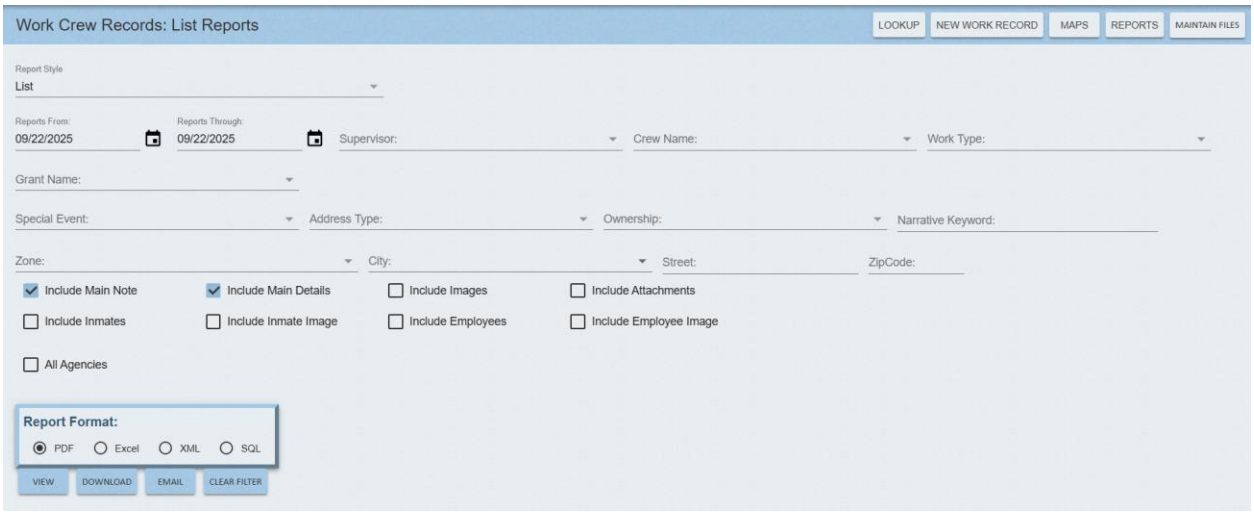


Now click on the **Reports** button in the upper right corner and select the report you wish to run. Different reports are explained over the next set of pages.



List Reports

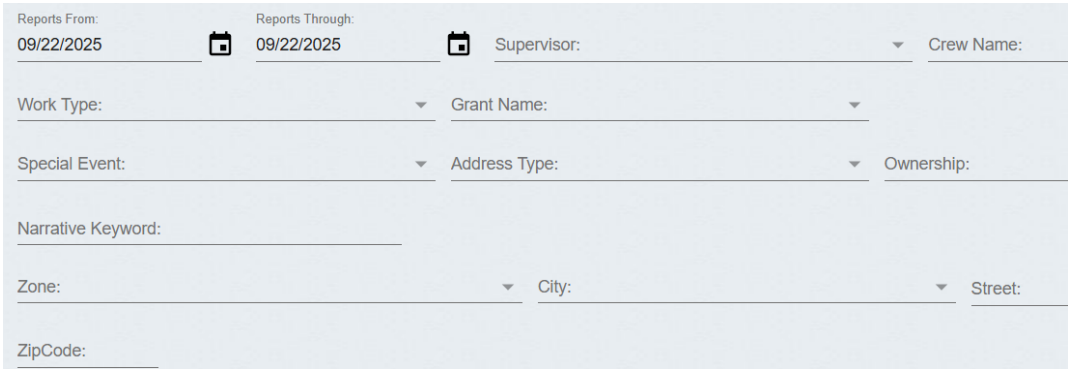
This report displays work crew records in iSOMS over a certain date range. In this way you can see an overview of work crew records over your chosen time period. Add the entry dates in **Reports From** and **Reports Through**.



Report Style has many different layout and sorting options, such as *List, List by City, List by Supervisor*, *List by Zone, List by School, List by Work Crew,* and more. Pick the one most relevant to your desired result.

List	List By Subdivision
List By Supervisor	List By Ownership Type
List By City	List By Structure Type
List By Zone	List By Worked For
List By School	List By Work Crew

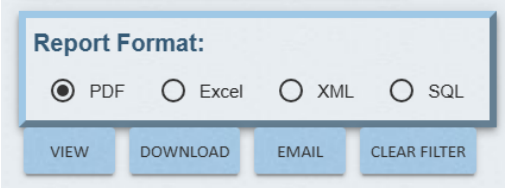
You can add various filters to reduce the list if desired.



Choose what you would like to include on the report, such as the main note, details, images, attachments, inmates, employees, etc.



Now, with your chosen parameters, click **View** or **Download** to view the report.



YOUR AGENCY
Work Crew List Report
Report Dates From 04/01/2016 Through 09/22/2025

Page 1 of 2

Work Crew Report

Supervisor	Report Date/Time	Work Crew	Work Type	Location	Hours Worked
GEORGE B	06/13/2020 14:00	KITCHEN MORNING	DIRT WORK	ABCEF	10

Location: **1905 HIGH PARK CIR**
Location: **MARYVILLE, TN 37803**
Entry By: **275**
Worked For: **TRASH COLLECTORS INC**
Work SubType: **FILL DIRT**
Ownership Type: **ROCKY TOP**
Structure Type:
Zone: **104 ZONE 1**
School: **CARPENTERS MIDDLE SCHOOL**
Subdivision: **BAXTER WOODS**

Latitude: **35.7203540**
Longitude: **-83.9777100**
Intersection: **5TH**
Campus: **WALTER STATE EAST**
Building:
Start Date: **06/13/2020 07:00**
End Date: **06/13/2020 17:00**

Narrative

trash

Work Crew Report

Supervisor	Report Date/Time	Work Crew	Work Type	Location	Hours Worked
	09/19/2025 15:16				0

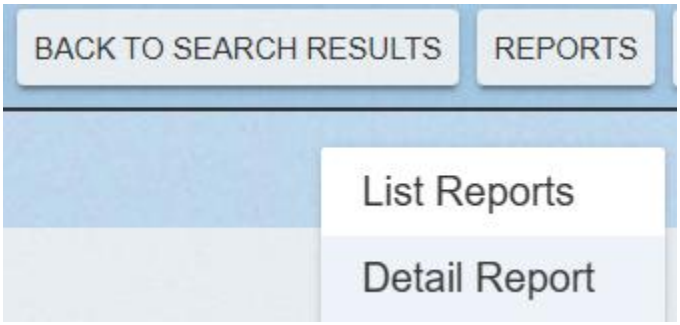
Detail Report

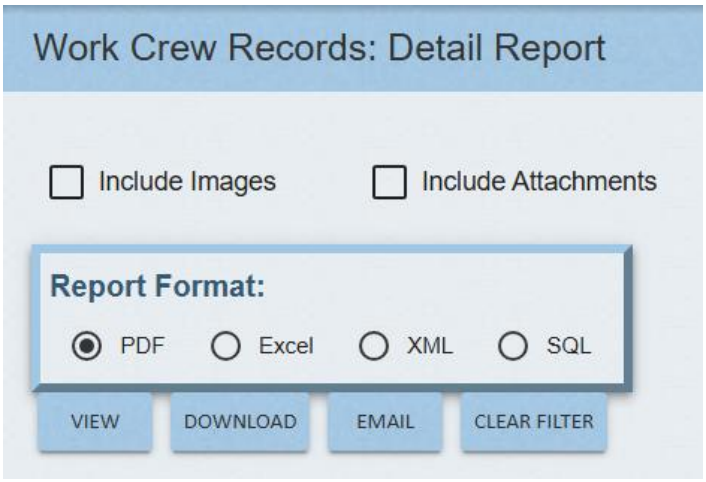
This report displays many details for individual work crew records.

First, go to the record you want to make a detail report for and open its record in iSOMS.



Then click **REPORTS → DETAIL REPORT** to open the Detail Report screen.





Choose what you would like included on the report, such as images or attachments. And with your chosen parameters, click **View** or **Download** to view the report.



YOUR AGENCY
Work Crew Details Report

Supervisor	Report Date	Work Crew	Work Type
GEORGE B	06/13/2020 14:00	KITCHEN MORNING	DIRT WORK

Location: **ABCEF**
Location: **1905 HIGH PARK CIR**
Location: **MARYVILLE, TN 37803**
Entry By: **275**
Worked For: **TRASH COLLECTORS INC**
Work SubType: **FILL DIRT**
Ownership Type: **ROCKY TOP**
Structure Type:
Zone: **104 ZONE 1**
School: **CARPENTERS MIDDLE SCHOOL**
Subdivision: **BAXTER WOODS**

Latitude: **35.7203540**
Longitude: **-83.9777100**
Intersection: **5TH**
Campus: **WALTER STATE EAST**
Building:
Start Date: **06/13/2020 07:00**
End Date: **06/13/2020 17:00**

Narrative

trash

Inmates

Inmate Name: **0'SHELL, SHANNON KIMBERLY**
Booking #: **20240500009**
Intake Date: **04/08/2025** Release Date:
Job Description:
Worked Hours: **0**

Inmates

Inmate Name: **DOE, JAMES RANDAL**
Booking #: **20250200002**
Intake Date: **02/20/2025** Release Date:
Job Description:
Worked Hours: **0**

Employees

Employee	Race	Sex
ELDER, MARTIN W	W	M

Major: COURT SERVICES

Commissary Module

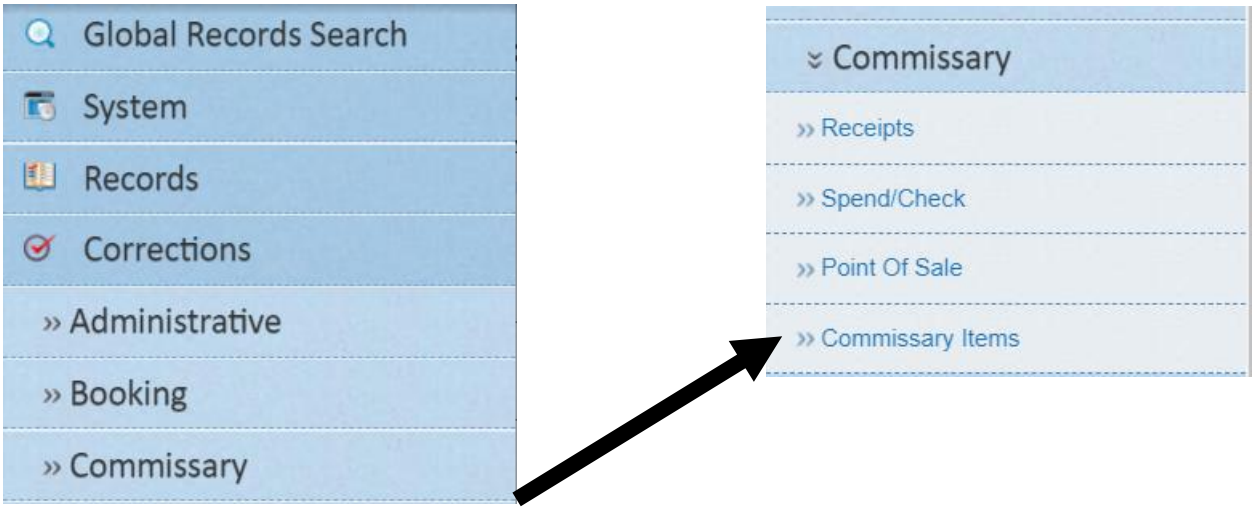
This section explains the iSOMS Commissary Module. Using iSOMS Commissary Module, you can:

- Add receipts records for when an inmate receives money
- Remove money from an inmate's account (for discharge or other special spending)
- Track when money is spent at the commissary (for spending on commissary items)
- Add new items to the records for commissary items

Commissary Items

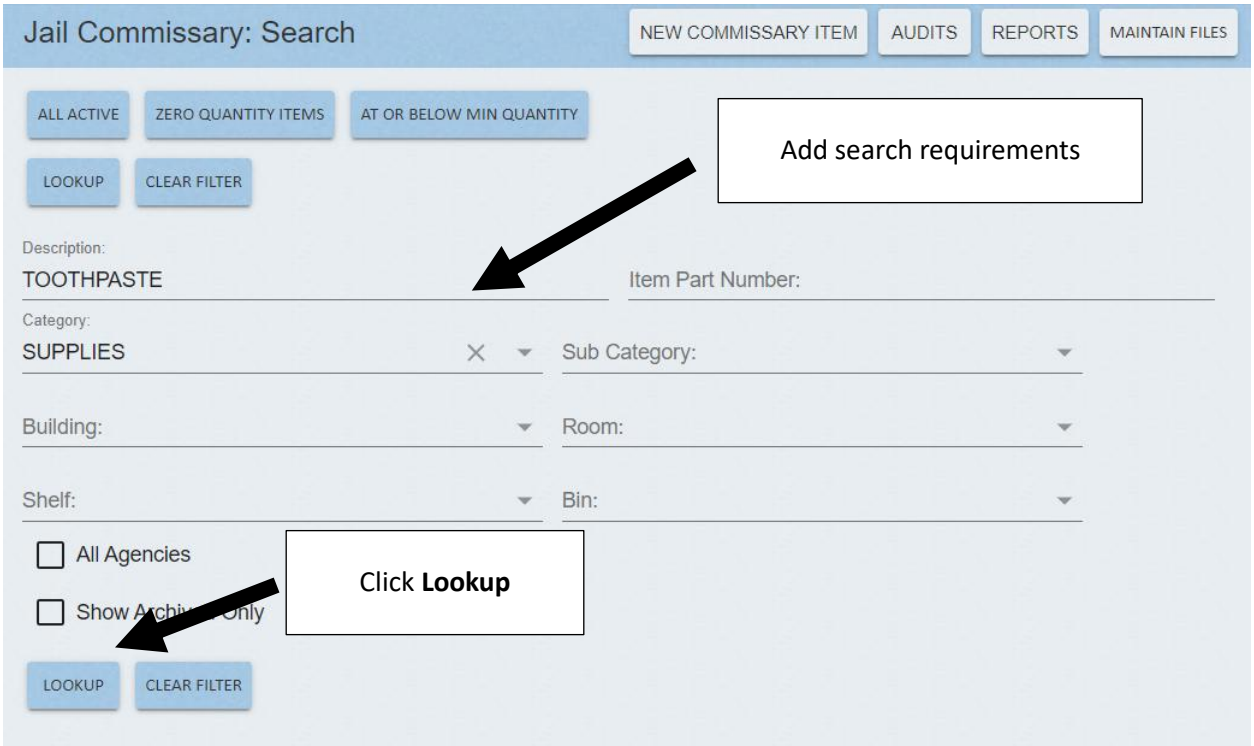
In order to record when items are sold, you have to add them to iSOMS. To add or search for an item, begin on the iSOMS home screen. Click on the following:

Corrections → Commissary → Commissary Items



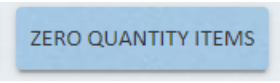
Searching for Commissary Items

This will open the **Jail Commissary: Search** screen. Here you can look up current items if you need to edit their cost, category, etc. To look up an item, type in the search filter fields and click on one of the **Lookup** buttons.

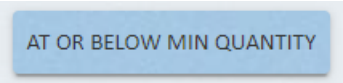


Quick Searches

If you want to find items that you have run out of, click on the **Zero Quantity Items** button to list all items that have no quantity listed.



If you want to search for items that are at or below the minimum quantity you've recorded as necessary, click on **At or Below Min Quantity.**

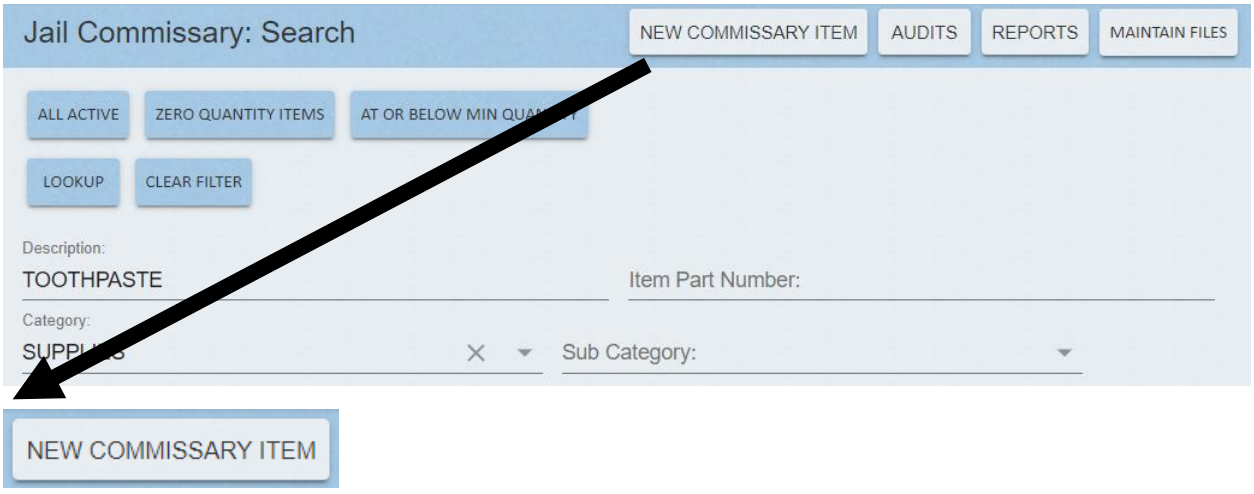


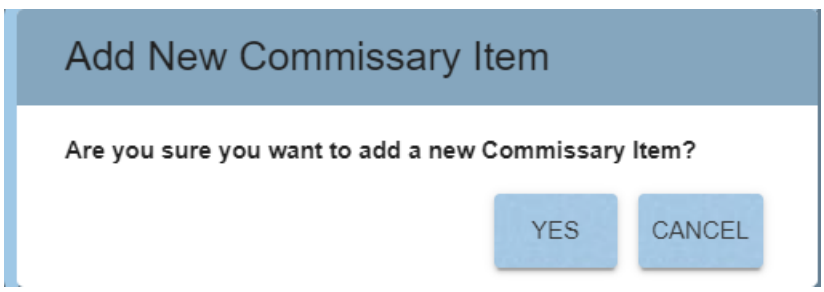
Whether you did a quick search or a standard search, you can double click on the entry or click on the pencil icon ( ) to open the screen to view, edit, or delete it.



Adding New Commissary Items

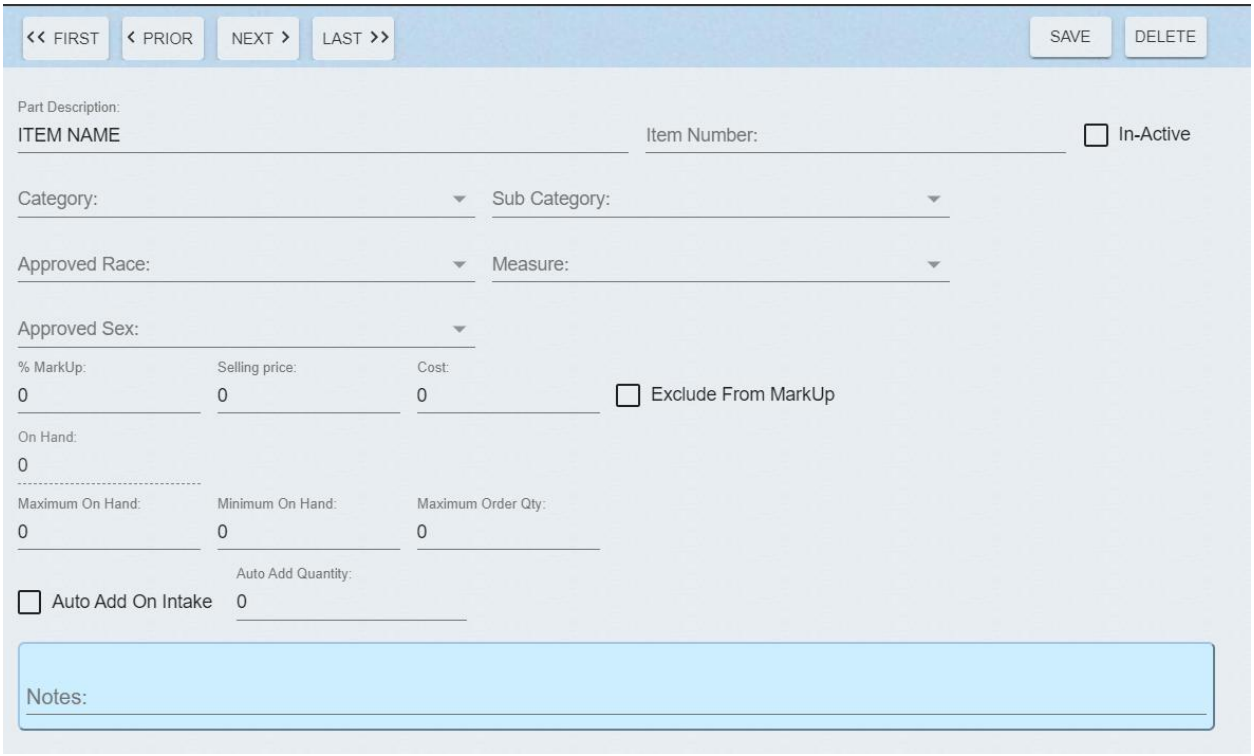
In order to add a new commissary items, click on the **New Commissary Item** button on the search screen. Click **Yes** when prompted for confirmation.



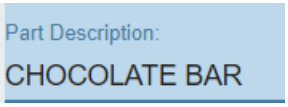


After confirming you want to add a new item, you will be brought to a screen where you can add information on the item you want to add.

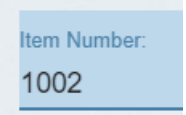
IMPORTANT: Optional items will be listed in **blue**. You can skip these items if not needed, or if you don't know if you need them.



Begin by adding the **Part Description**, that is, the name of the item you are adding.



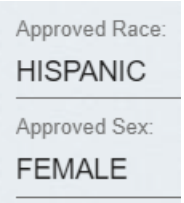
You can optionally add an **Item Number** for your own personal records.



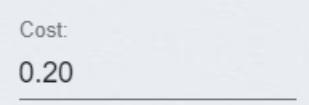
Pick a **Category** and **Sub-category** from the dropdown menus to help sort the new item.



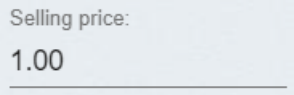
If the item can only be used by a certain race or sex (such as medical or personal items), then use **Approved Race** and **Approved Sex** to record those details.



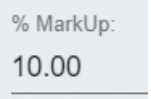
Record how much the item costs your agency in the **Cost** field.



Add the **Selling Price** to record how much it will cost the inmates to purchase this item.



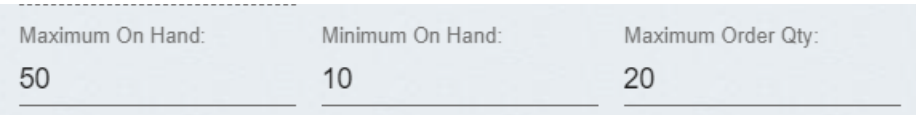
You can use the **Markup** field to record the % of markup. This field is optional.



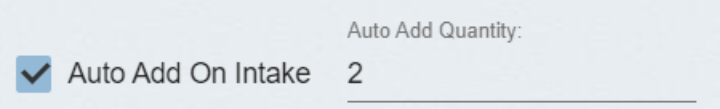
Add the maximum number of the item you should reasonably have in **Maximum On Hand.**

Use the **Minimum on Hand** field to record how much of the item you should have stored.

Record the most you should order of the item at once in the **Maximum Order Quantity** field.



If this item should automatically be assigned to new inmates, use the **Auto Add On Intake Checkbox** to note that it is for inmates who have just booked and write how many of the item should be assigned in the **Auto Add Quantity** field.



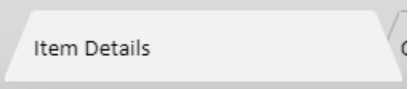
Now that you have filled out the fields, you can use the tabs below the fields to record additional information on the item. See the next section for more info.

Commissary Item Tabs

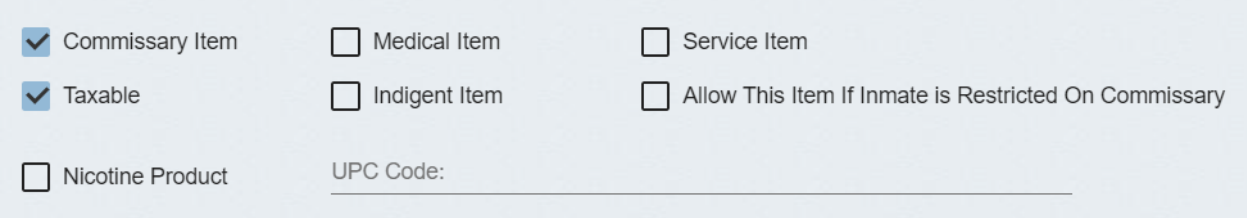
Summary

Fill out the tabs below the fields for commissary items as needed. The **Item Details** tab should be filled out when you create the entry. Use **Order History, Adjustment History, and Physical Count History** to keep track of how much of the item you have on hand. **Sales History** will track the sales of the item to inmates. **Notes**, **Images**, and **Attachments** tabs are available if you need to take additional notes or upload images and documents.

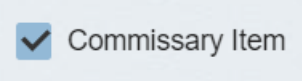
Item Details Tab



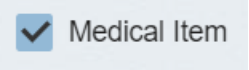
Item Details lets you record relevant information about the item and should always be filled out immediately when adding a new item. Check the boxes as appropriate.



If the item is a commissary item to be sold to inmates, check **Commissary Item.**



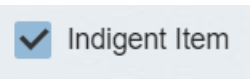
If the item is a medical item, such as over the counter medication or medical devices, check **Medical Item**.



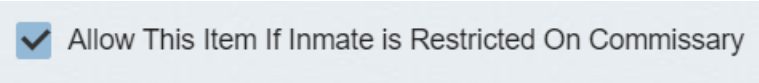
If the item is actually a service, such as a haircut, check **Service Item**.



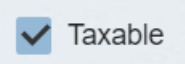
If the item should be distributed or given to indigent inmates, check **Indigent Item**.



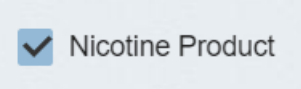
If the item should still be allowed to be sold or given to inmates who have commissary restrictions, check **Allow This Item if Inmate is Restricted on Commissary.**



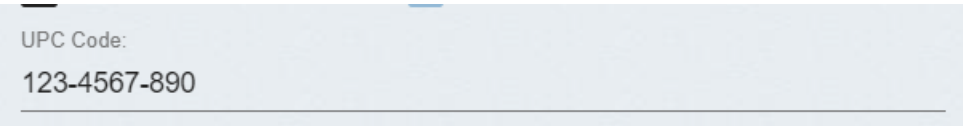
If inmates should pay tax when purchasing the item, check **Taxable**.



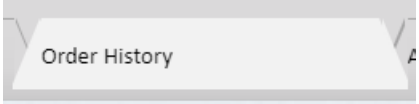
If the item is a nicotine product, such as cigarettes, check **Nicotine Product**.



You can also add a **UPC code** here if you would like.



Order History Tab



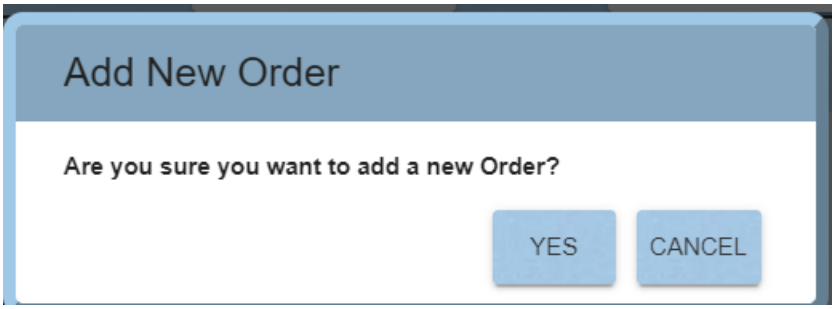
The **Order History** tab allows you to track orders of the item. This allows iSOMS to keep track of how much of the item you have on hand and how much you have ordered in the past. You can view previous orders on the table. To view, edit, or delete an entry, double-click it on the table.

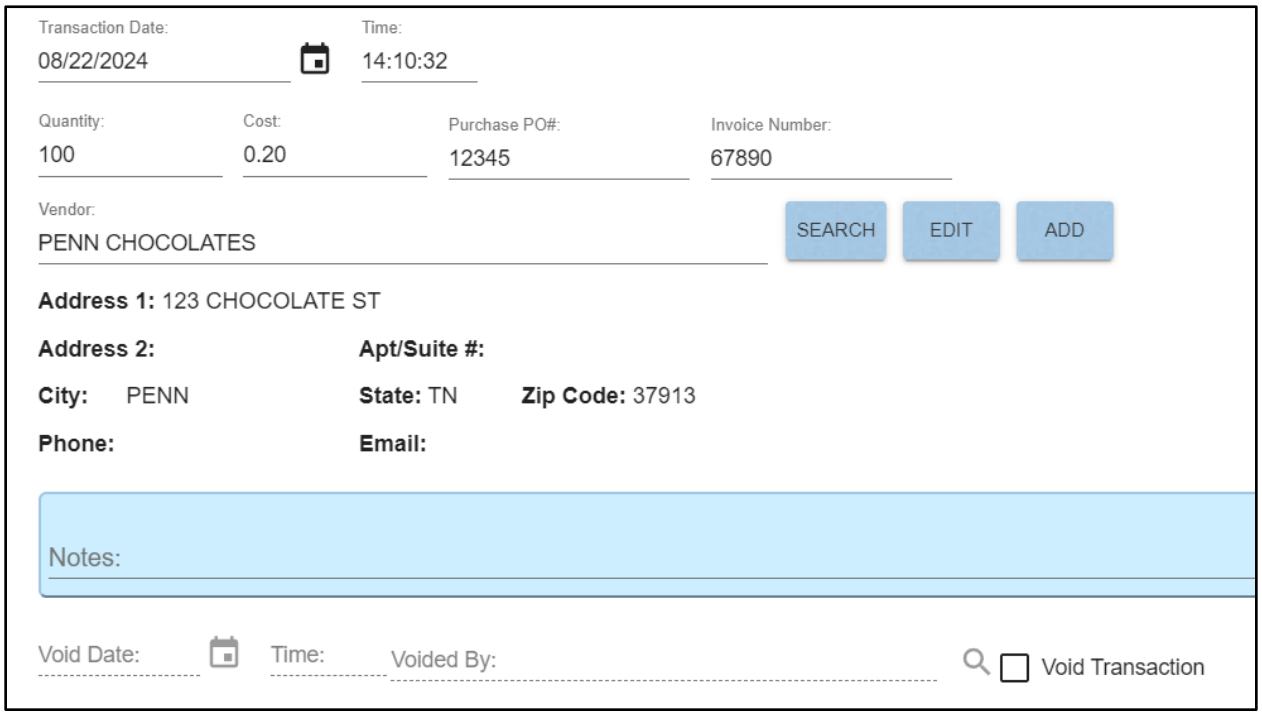


To add a new order, click **Add Order** in the top right corner.



Confirm you want to add a new order, and you will be able to fill in the order details.

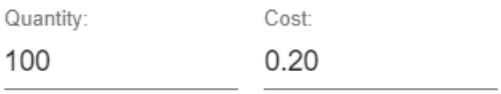




The **Transaction Date and Time** will be set to the current date and time, but you can change it to the actual order time if it is different.



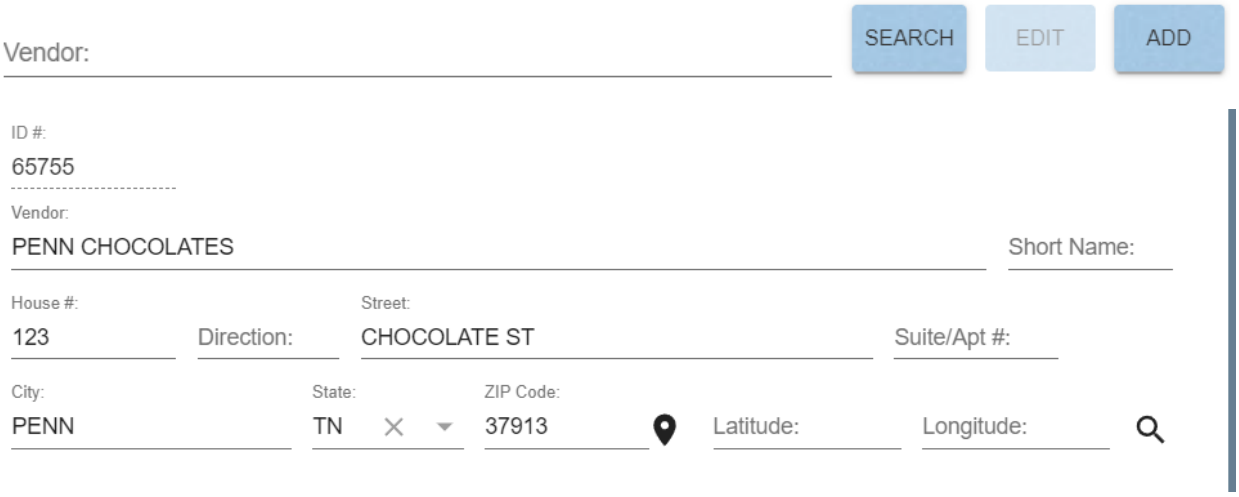
Enter the number of items ordered in **Quantity.** The cost will be added automatically from the field you used earlier, but you can adjust it for only this order if needed. This will automatically track how much you have on hand.



You can add a **Purchase PO#** or **Invoice Number** if necessary.



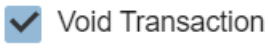
Search for a vendor name by typing the name of the vendor you bought the item from. If the name is not currently in your iSOMS system, click **Add** and add the relevant address details.



Add any relevant **Notes** and click **Save.**



If you need to void this order later but want to keep the information that was entered, use the **Void Transaction** checkbox at the bottom of the window to cancel the order. iSOMS will disregard the change in amount for the item but you can still see the information entered.

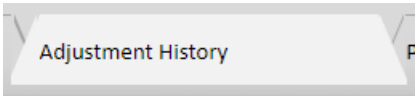


Example: If we added 20 in the order, then 20 will be added to the **On Hand** amount for the item.

Before order: *Place order of 20:* *After recording order of 20:*



Adjustment History Tab



The **Adjustment History** tab lets you adjust the amount of an item you have on hand. When you adjust the count up or down here, it will change the amount on hand by the same amount. iSOMS actually keeps track of how many items you have on hand when you sell or give them to inmates, but you can use adjustments to track waste, donations of supplies, etc.

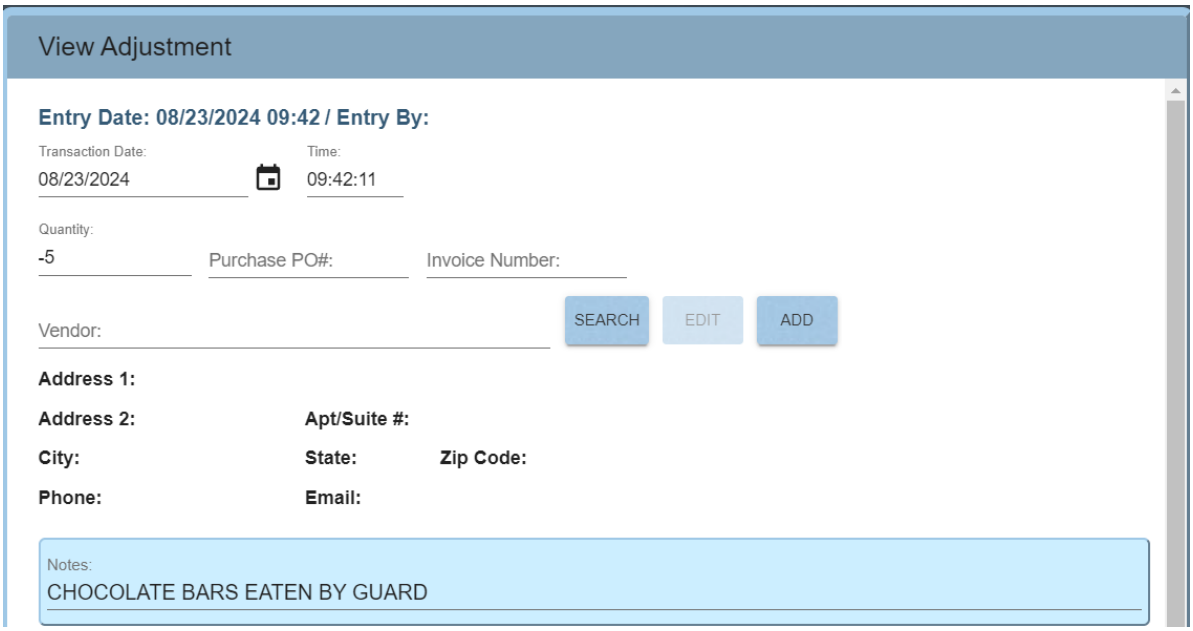
You can view previous adjustments on the table. To view relevant notes, click on an entry *once.* They will be listed below the table. To view, edit, or delete an entry, double-click it on the table.



To add an adjustment, click **Add Adjustment** in the upper right corner.



After confirming you want to add a new adjustment, fill in the details of the adjustment.



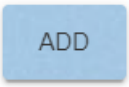
First, add the quantity change in **Quantity.** The field accepts positive and negative numbers, so you can use positive numbers for donations and the like. Use negative numbers when an item is broken or goes to waste.



Now if the reason for the adjustment was a company, such as a donation from an organization, then you can add a vendor as described above in the *Orders* tab. Simply type the name of the company to search for it or click **Add** to add a new vendor.

Type in the field to search, or… *Click **Add** to add a new vendor*



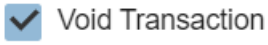


Finally, add any relevant notes in the **Notes** field, and then click **Save** to save the adjustment.



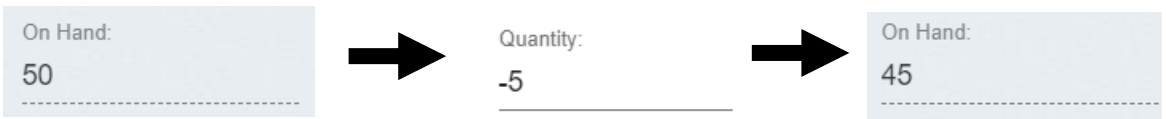


If you need to void this adjustment later but want to keep the information that was entered, use the **Void Transaction** checkbox at the bottom of the window to cancel the adjustment. iSOMS will disregard the change in amount for the item but you can still see the information entered.

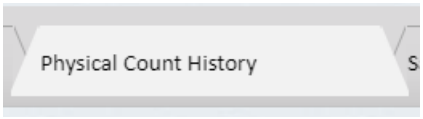


Example: If we subtract 5 in the adjustment, then 5 will be subtracted from the **On Hand** amount for the item.

Before adjustment: *Adjustment of -5:* *After adjustment of -5:*

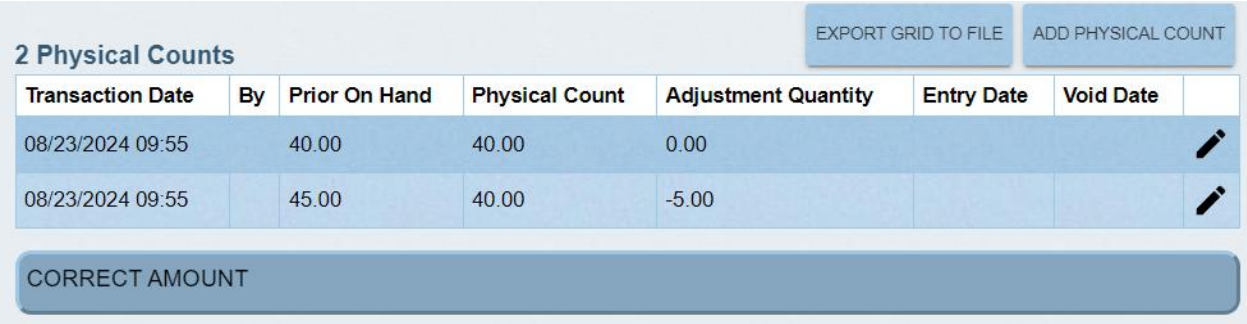


Physical Count History Tab

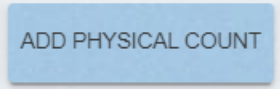


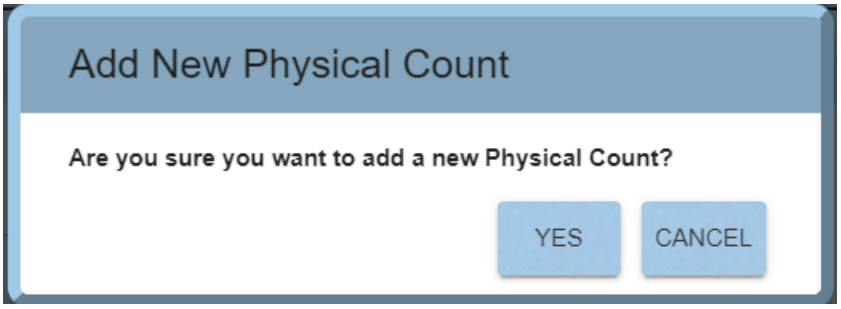
The **Physical Count History** tab lets you update your count of an item in iSOMS. When you add an entry in this tab, the **On Hand** field in the main item record will automatically adjust to how many of the item was counted. This allows you to keep track of the actual count of an item, so you know what you really have, such as when you want to do inventory. An example is given at the end of this tab's section.

You can view previous counting records on the table. To view relevant notes, click on an entry *once.* They will be listed below the table. To view, edit, or delete an entry, double-click it on the table.



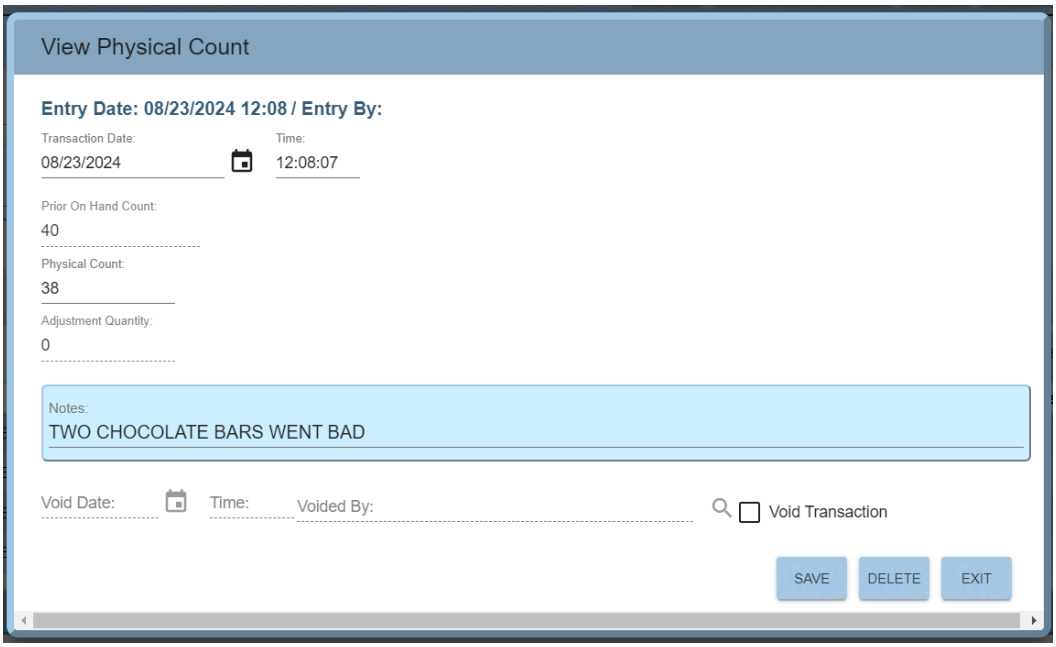
To add a counting record, click **Add Physical Count** in the upper right corner.



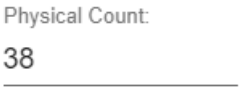


After confirming you want to add a new record, fill in the details of the physical count.

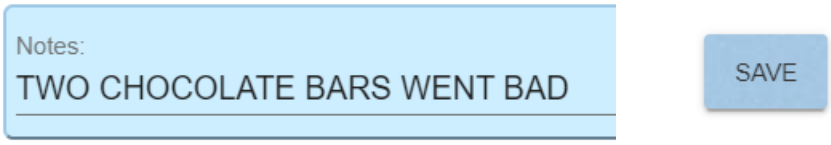
See next page for screenshot.



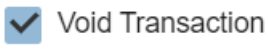
First, add the actual amount of the item counted in **Physical Count.**



Add any relevant notes in the **Notes** field, and then click **Save** to save the physical count.



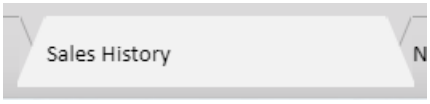
If you need to void this physical count later but want to keep the information that was entered, use the **Void Transaction** checkbox at the bottom of the window to cancel the change. iSOMS will disregard the change in amount for the item but you can still see the information entered.



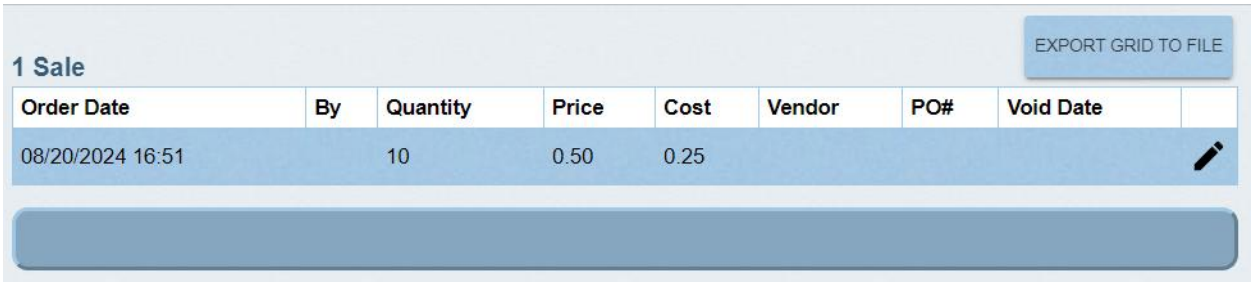
Finishing Up

At this point, you have filled in the tabs that are usually necessary. You can click **Save** to save the record. If you need to view sales history or add any notes, images, or attachments, see the entries below.

Sales History Tab



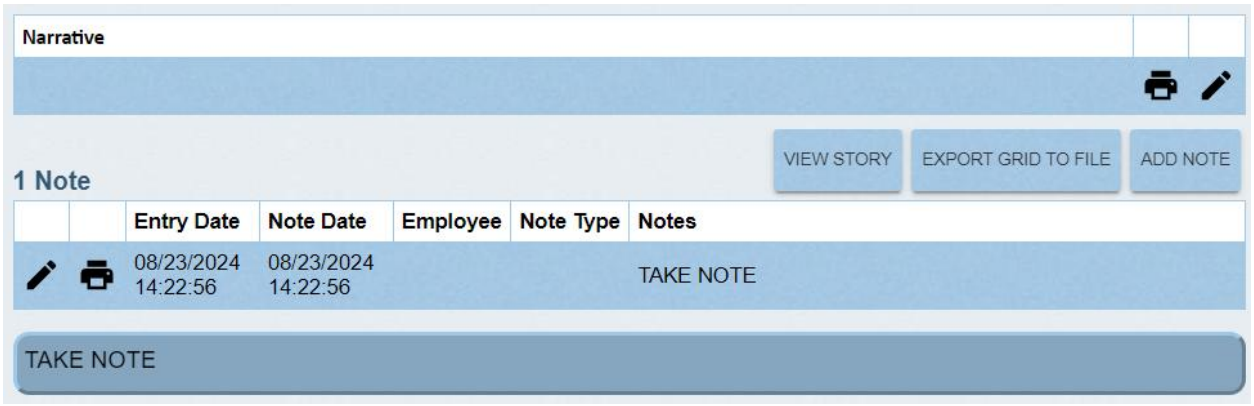
The **Sales History** tab shows you the records of sales for this commissary item.
This is a read only tab.



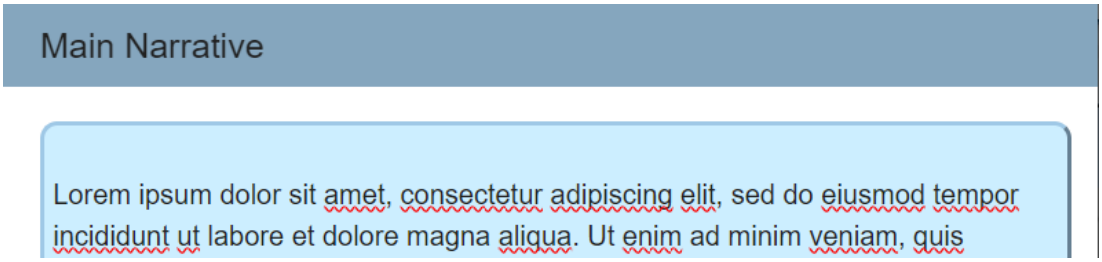
Notes Tab



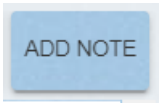
The **Notes** tab is used to view or add notes pertinent to the commissary item. Double-click on any entry in the table to edit or view it.

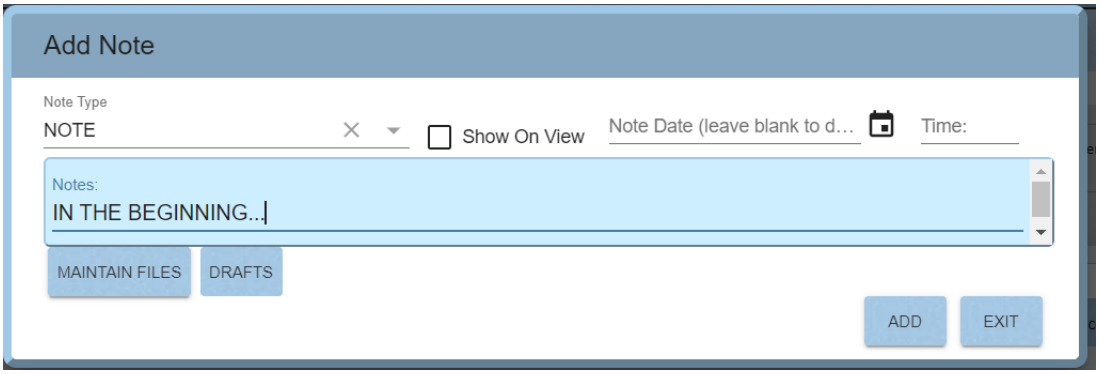


Narrative acts as an area where you can add a long note. This is useful when you want to add important or long form notes that won't be mixed in with the rest of the short notes.



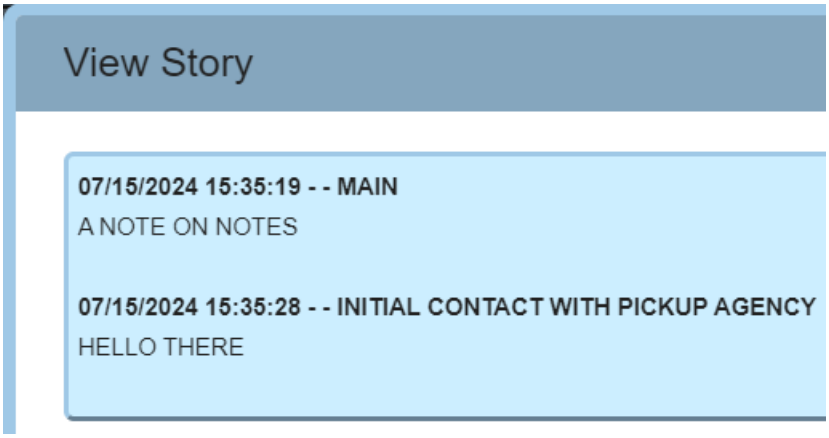
Use **Add Note** to add a new note.





The **View Story** button will show all notes (except Narrative) that have been added on one page.





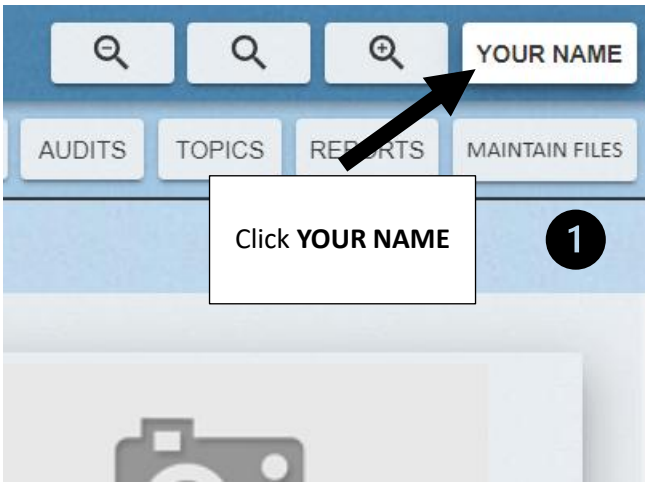
Images Tab

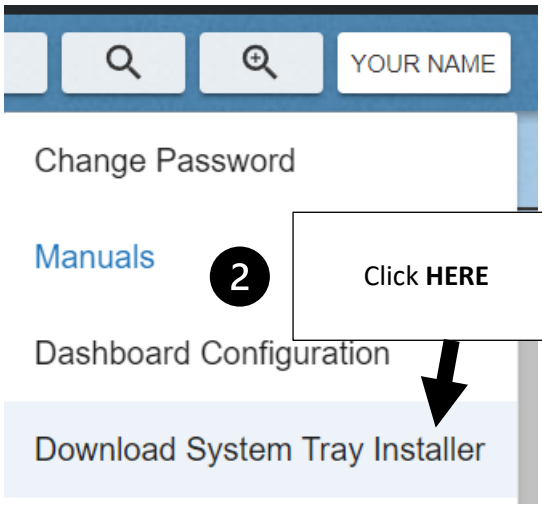


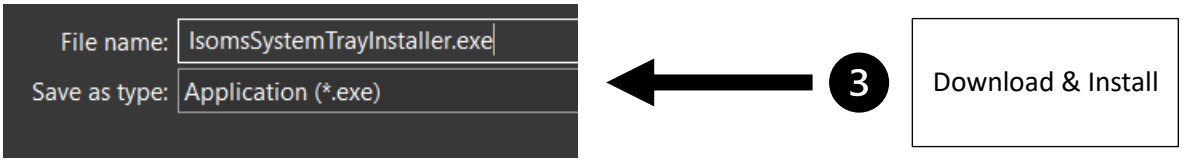
The **Images** tab is used to view, download, or add images. You can add a single image at a time or multiple images at a time. Click **Add Image** to add a single image.



To add multiple images at a time, you will need the System Tray Installer downloaded to the computer you are using. The System Tray Installer can be found on the iSOMS home page by clicking on the button in the upper right with your username. Once you click on that, you will get a drop-down list with **Download System Tray Installer** as one of the options. Download and install it on this computer.

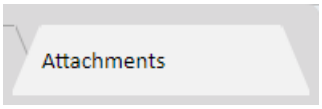






After you have the System Tray Installer on the computer, you can now use the **Add Images** button to upload multiple images at once if necessary.

Attachments Tab

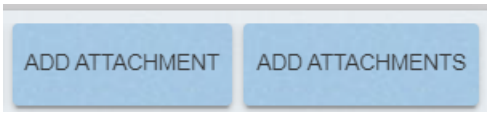


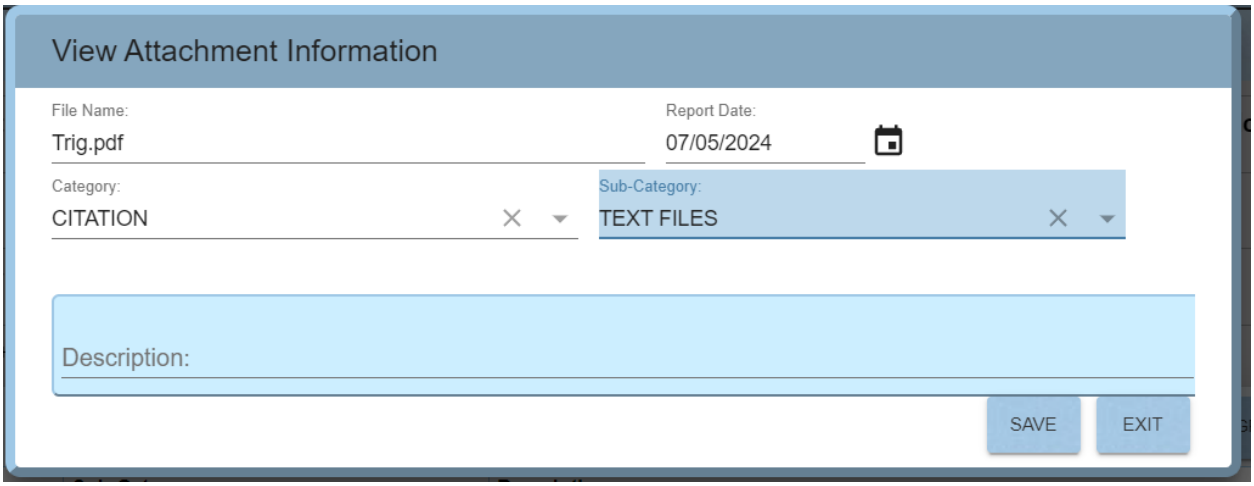
The **Attachments** tab is used to view, download, or add attachments. Double-click a file entry to view the record for the attachment or click on the icon to download the attachment to the computer.



You can add a single attachment at a time or multiple attachments at a time. Just like above with images, you will need the System Tray Installer downloaded to the computer you are using to add multiple attachments at once. See the *Image* tab instructions on the previous few pages for instructions on installing the System Tray Installer.

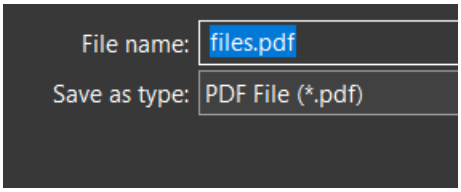
Click **Add Attachment** to add a single attachment or click **Add Attachments** to add multiple attachments at the same time. Choose the attachments from the computer, then add the appropriate category and sub-category for the file.



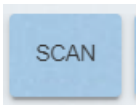


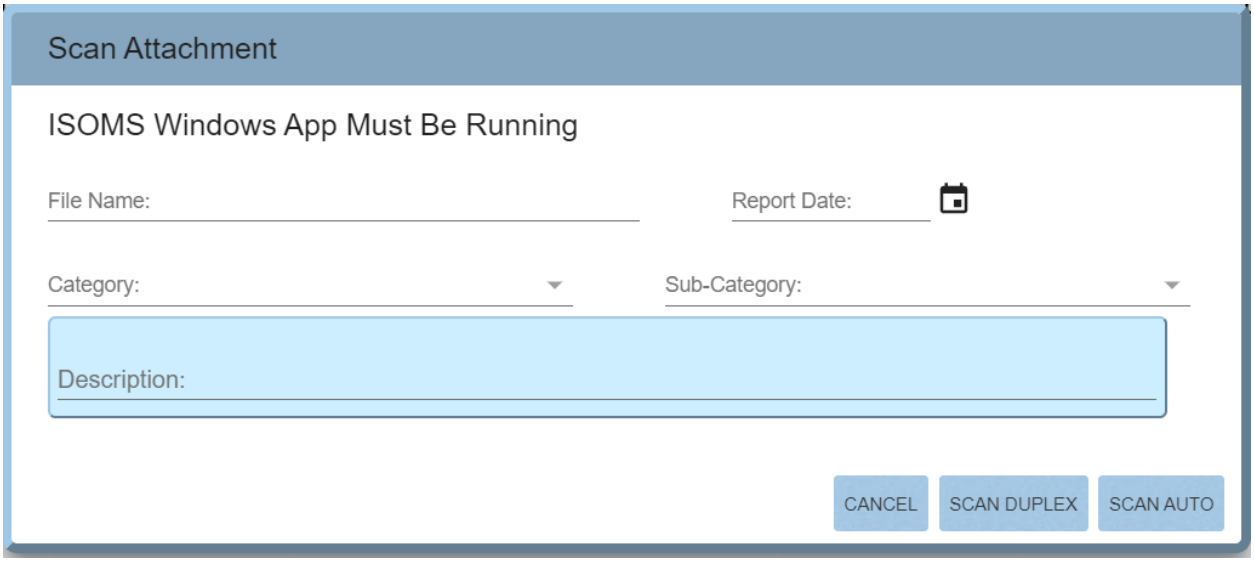
You can also **Download All PDFs** at once by clicking the appropriate button.





If you have the iSOMS Windows App, you can use **Scan** to scan files into the attachments.



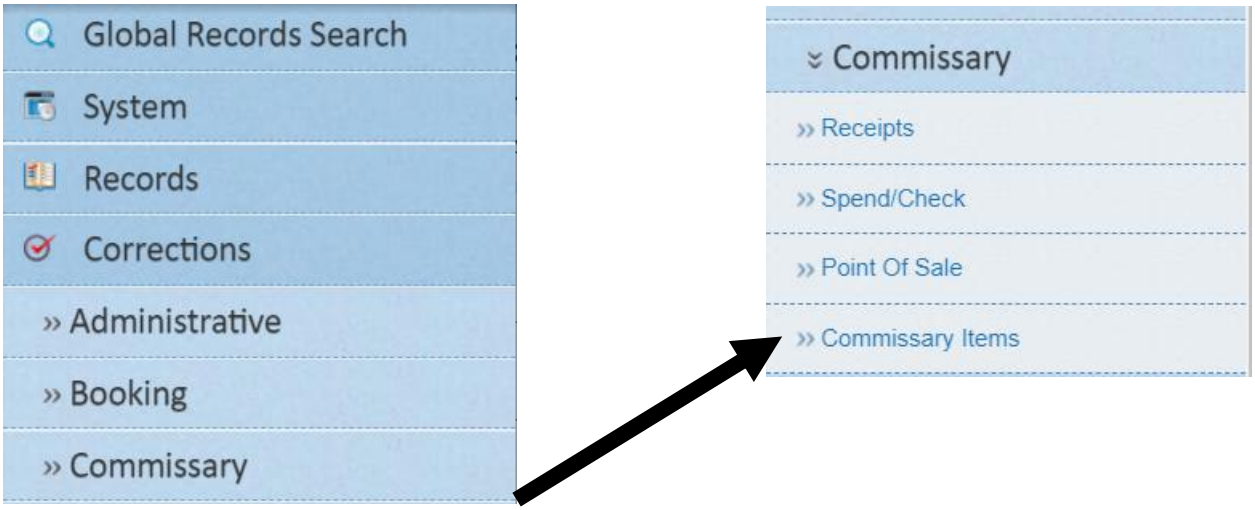


Commissary Item Reports

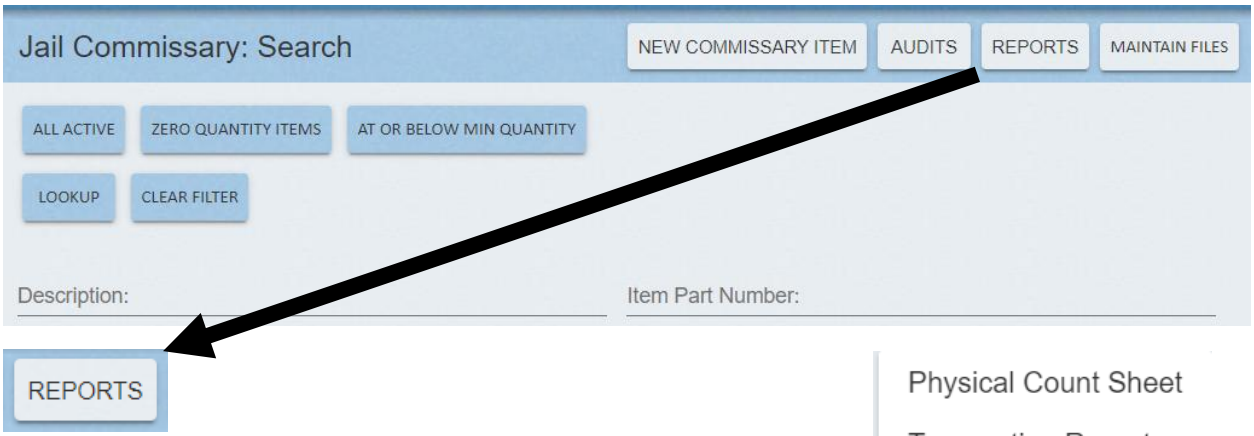
iSOMS has the capability to allow you to print four different types of reports for commissary items. Note that these reports are like summaries in nature. If you need a document for the sale of items or receipt of goods, see the other Reports sections in this guide.

To access the reports, begin on the iSOMS home screen. Click on the following:

Corrections → Commissary → Commissary Items



Now click on the **Reports** button in the upper right corner.



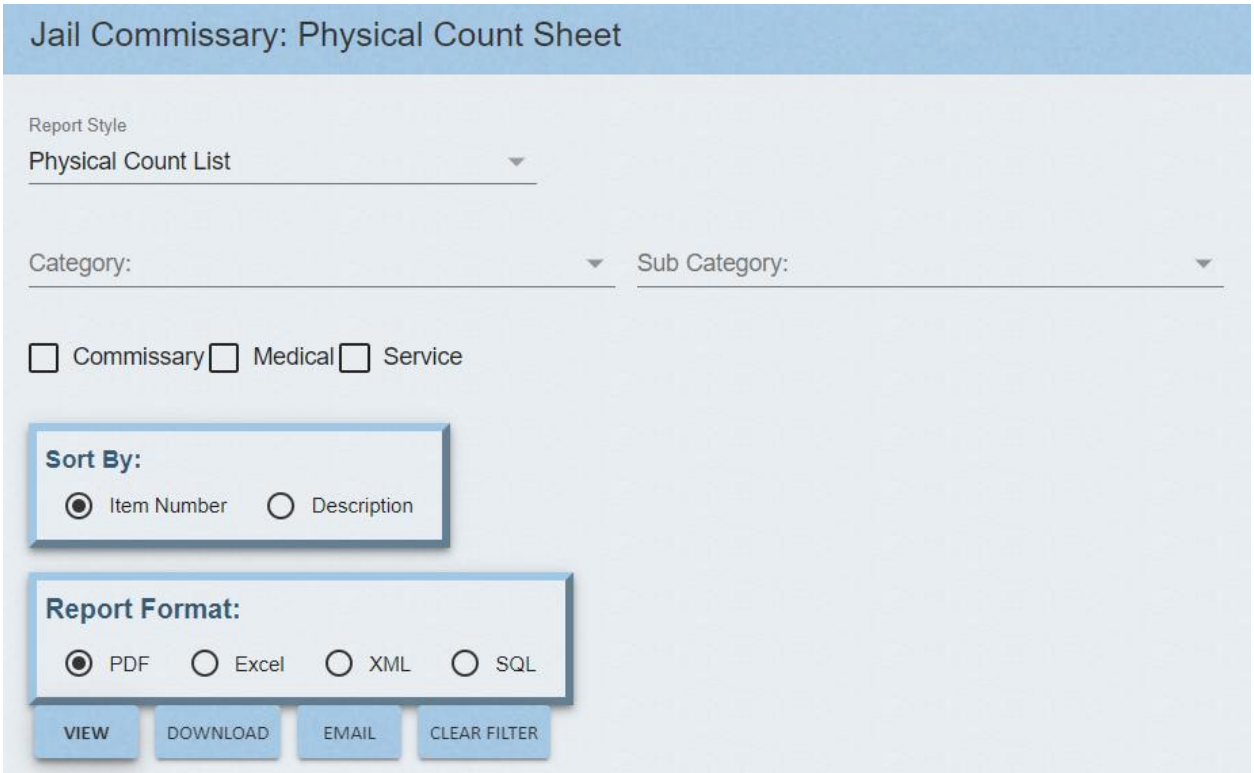


You can then choose from the following options, which are explained on the following pages.

Physical Count Sheet	Transaction Reports
Sale Report	Summary Reports

Physical Count Sheet

This report displays all of the items in your iSOMS records so you can write down how much of each item you have, such as for inventory and counting items.



Set your parameters for the report and click **View** or **Download** to view the report.

Your Agency X

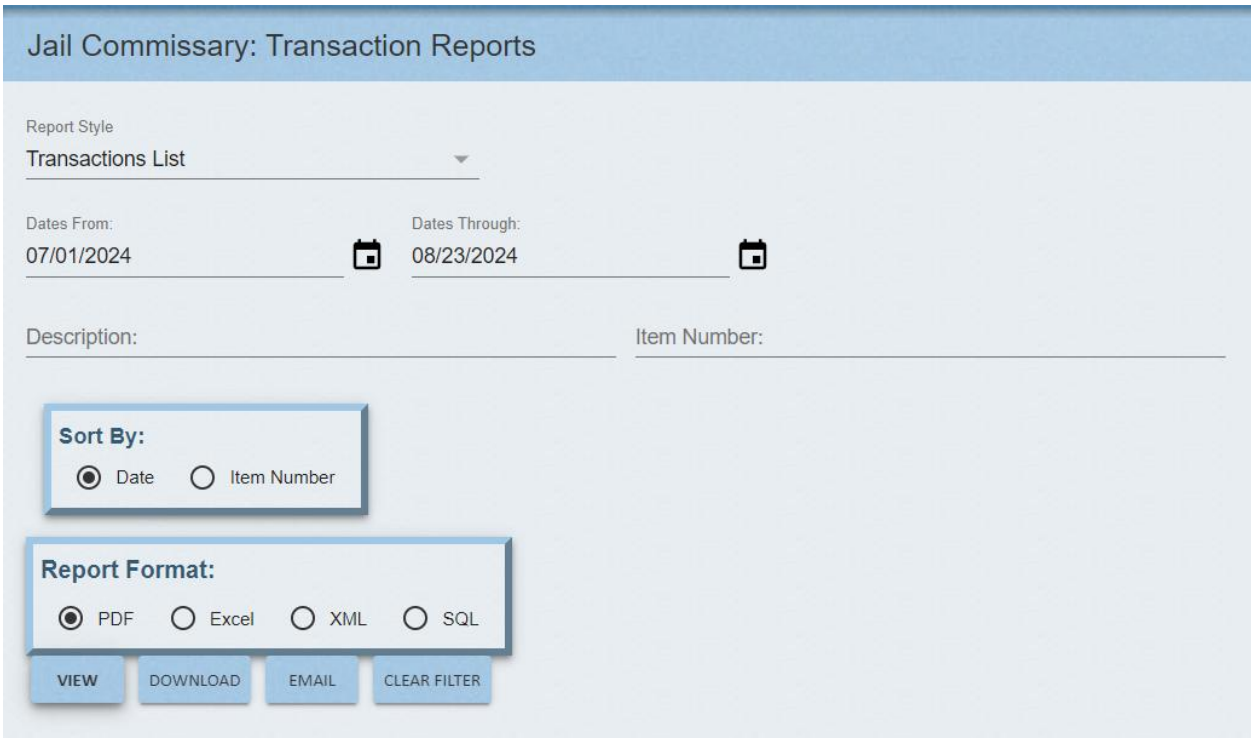
Commissary Item Physical Count List

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Item Number	Description	On-Hand	Count
1200	SALTED PEANUTS	86.00	
1201	HOT PEANUTS	94.00	
1202	ORIGINAL FLAVOR POTATO CHIPS	82.00	
1203	CHILI CHEESE FRITOS	0.00	
1204	CAJUN STYLE CRACKLINS	0.00	
1205	DORITOES	0.00	
1206	CHEESE NUGGETS JALA OR RA	0.00	
1207	LG BUFFALO WING CHIPS	0.00	

Transaction Reports

This sheet displays all of the orders, adjustments, and physical counts in your iSOMS records. Note this does not include sales records.



Set your parameters for the report and click **View** or **Download** to view the report.

Your Agency X

Commissary Transactions

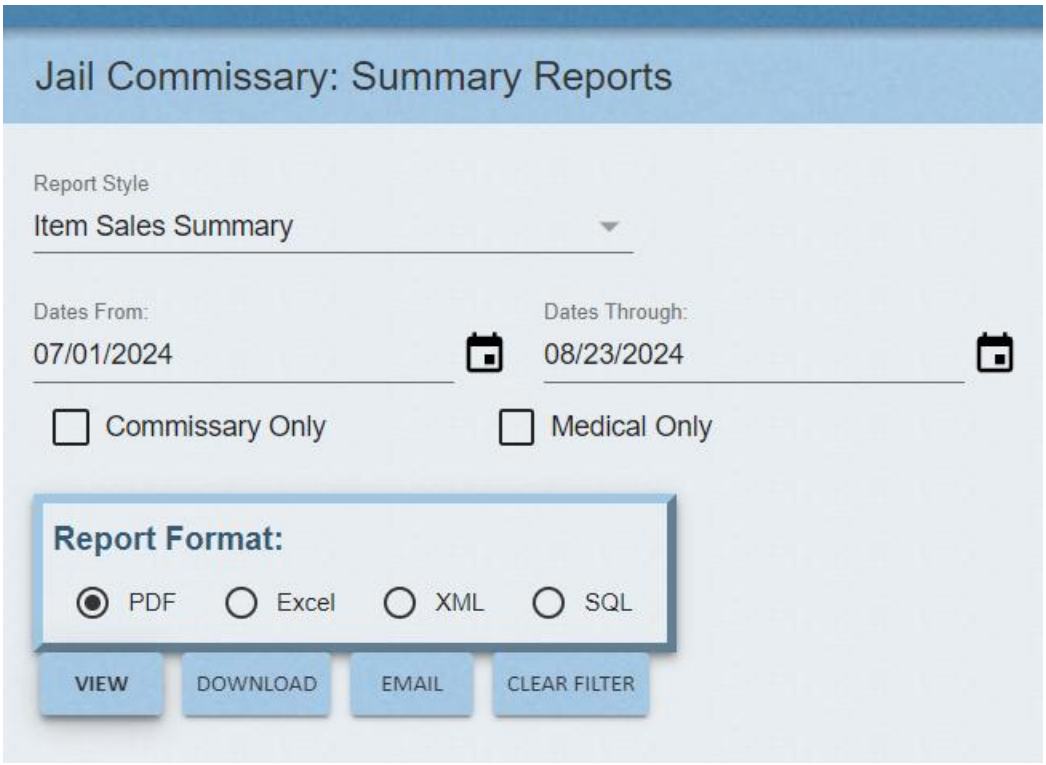
Transaction From 07/01/2024 Through 08/23/2024

Page 1 of 1

Item Number	Description	Date	Type	QTY	Cost	Invoice/Order#	Vendor
1101	KIT KAT	08/20/2024 16:48	PHYSICAL	-15	$1.00		
	LOCATION	08/21/2024 17:32	ADJUSTMENT	0	$0.00		
1002	CHOCOLATE BAR	08/22/2024 13:41	ADJUSTMENT	-3	$0.20		
1002	CHOCOLATE BAR	08/22/2024 13:41	ORDER	10	$0.20		PENN CHOCOLATES

Sale Reports

This sheet displays all of sales in your iSOMS records for commissary items by *items*. It will display each sale, cost, and profit for a certain date range.



Set your parameters for the report. Make sure to add at a date range in **Dates From** and **Dates Through**. Click **View** or **Download** to view the report.

Your Agency X

Commissary Summary

Transaction From 07/01/2024 Through 08/23/2024

Page 1 of 1

Item Number	Description	QTY	Price	Sales	Collected	# of Inmates
TOOTHPASTE	**ASSTD BRANDS**	**1**	**$2.25**	**$2.25**	**$2.25**	**1**
OREO	**OREO COOKIES**	**10**	**$0.50**	**$5.00**	**$5.00**	**1**

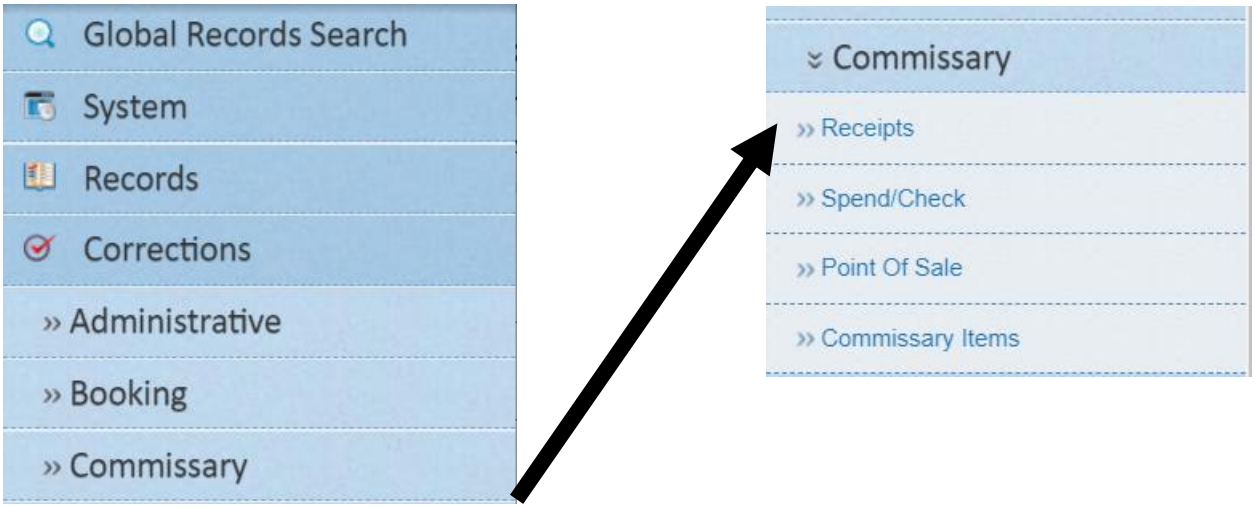
Total Inmates: **2**
Total Quantity: **11**
Total Sales: **$7.25**
Total Money Collected: **$7.25**

Money Receipts

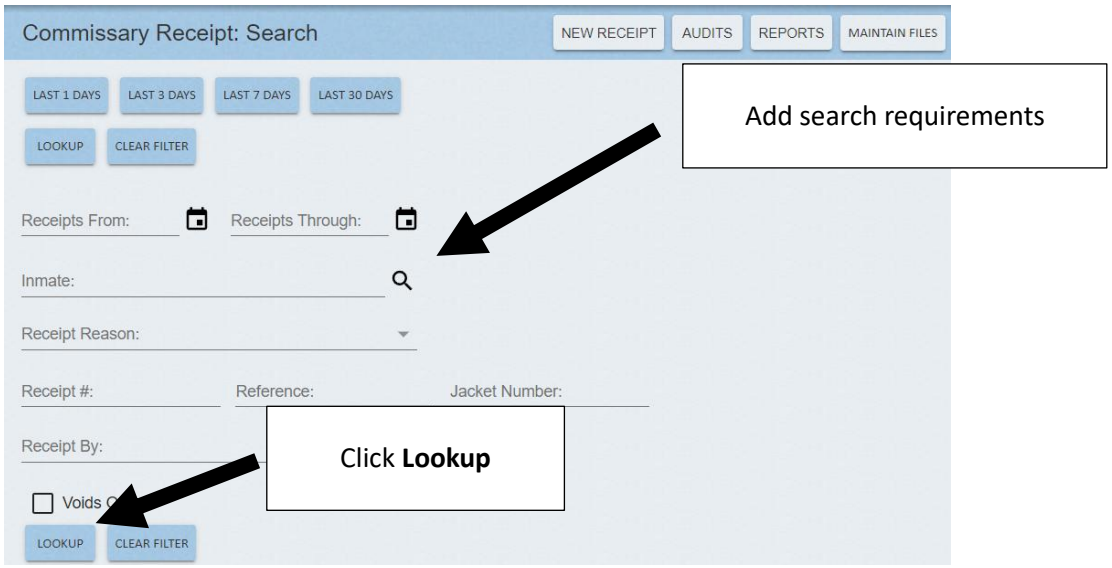
The **Receipts** section of the Commissary Module allows you to track the reception of money by inmates from any sources so iSOMS can track how much money they have to spend. To access the **Receipts** module, begin on the iSOMS home screen.

Click on the following:

Corrections → Commissary → Receipts



This will open the **Commissary Receipt: Search** screen. Here you can look up records of previous reception of money. To look up a record of money receipt, type in the search filter fields and click on one of the **Lookup** buttons.

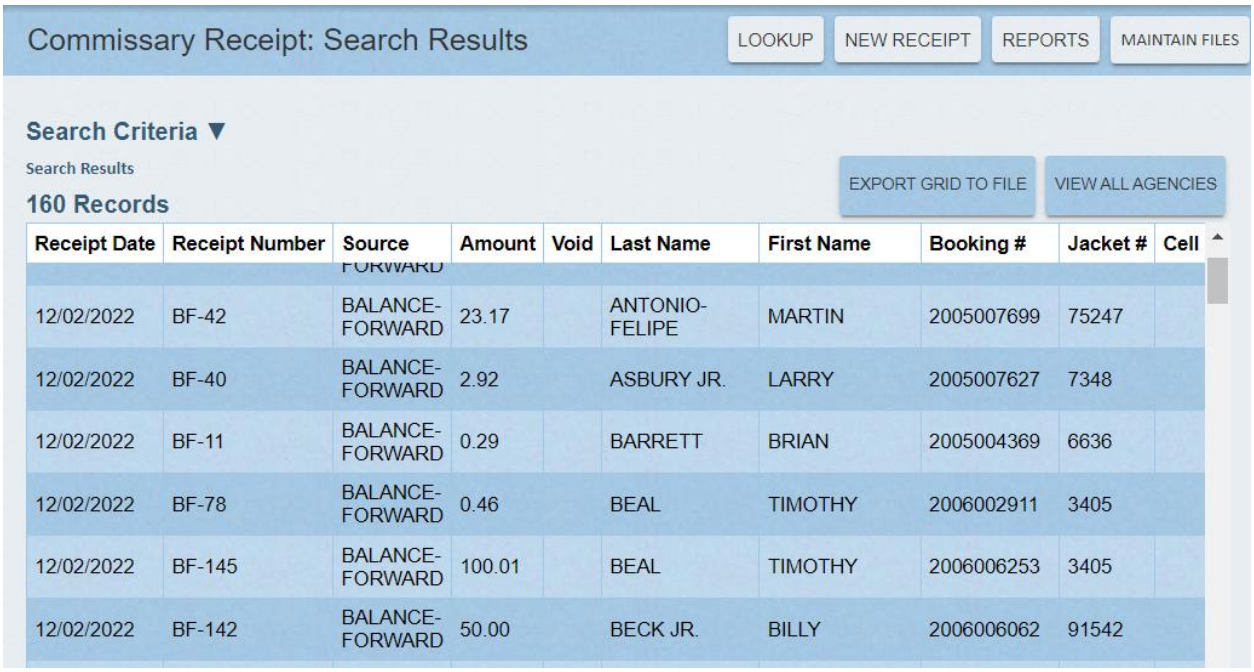


Quick Searches

If you want to do a quick search to find all money receipt records in the past set days, use the buttons to find records in the time range. You can search the past one, three, seven, and thirty days.



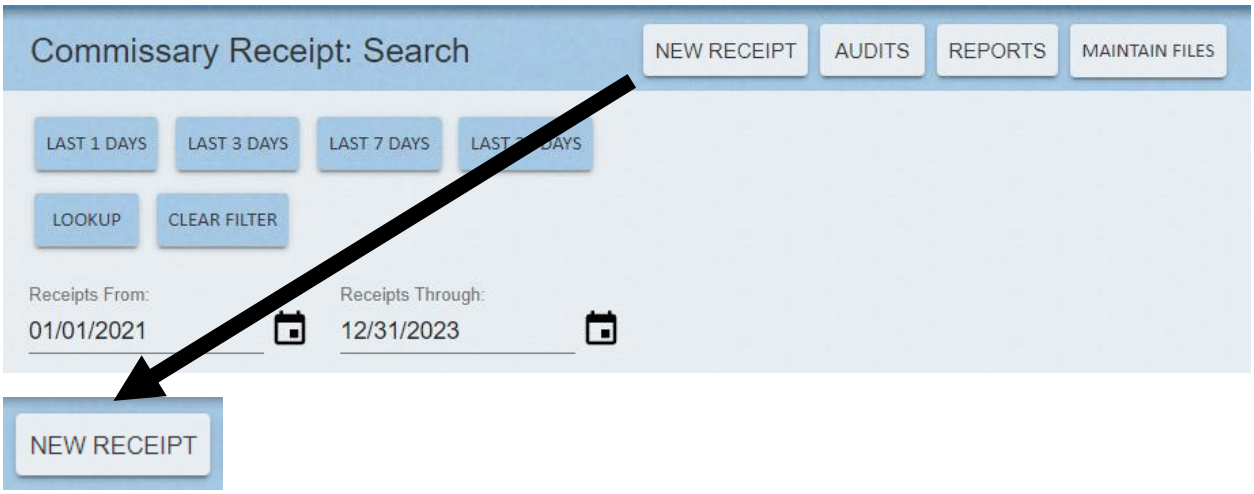
Whether you did a quick search or a standard search, you can double click on the entry or click on the pencil icon ( ) to open the screen to view, edit, or delete it.



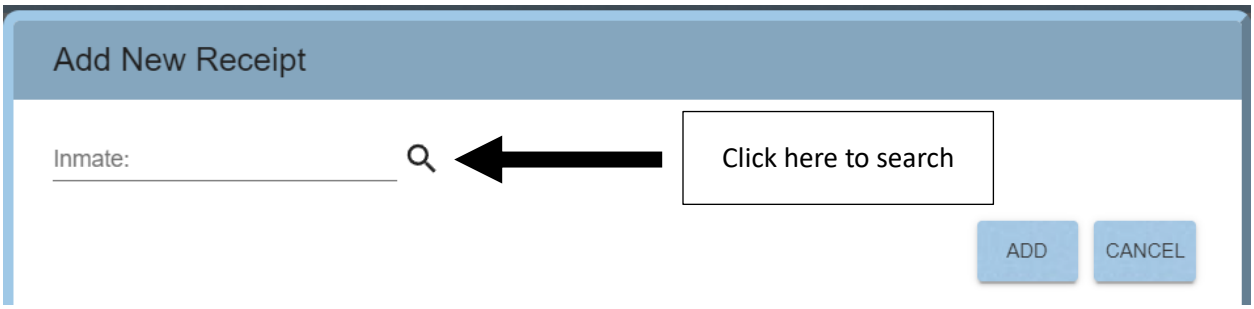
Receipt Date	Receipt Number	Source	Amount	Void	Last Name	First Name	Booking #	Jacket #	Cell
12/02/2022	BF-42	BALANCE-FORWARD	23.17		ANTONIO-FELIPE	MARTIN	2005007699	75247	
12/02/2022	BF-40	BALANCE-FORWARD	2.92		ASBURY JR.	LARRY	2005007627	7348	
12/02/2022	BF-11	BALANCE-FORWARD	0.29		BARRETT	BRIAN	2005004369	6636	
12/02/2022	BF-78	BALANCE-FORWARD	0.46		BEAL	TIMOTHY	2006002911	3405	
12/02/2022	BF-145	BALANCE-FORWARD	100.01		BEAL	TIMOTHY	2006006253	3405	
12/02/2022	BF-142	BALANCE-FORWARD	50.00		BECK JR.	BILLY	2006006062	91542	

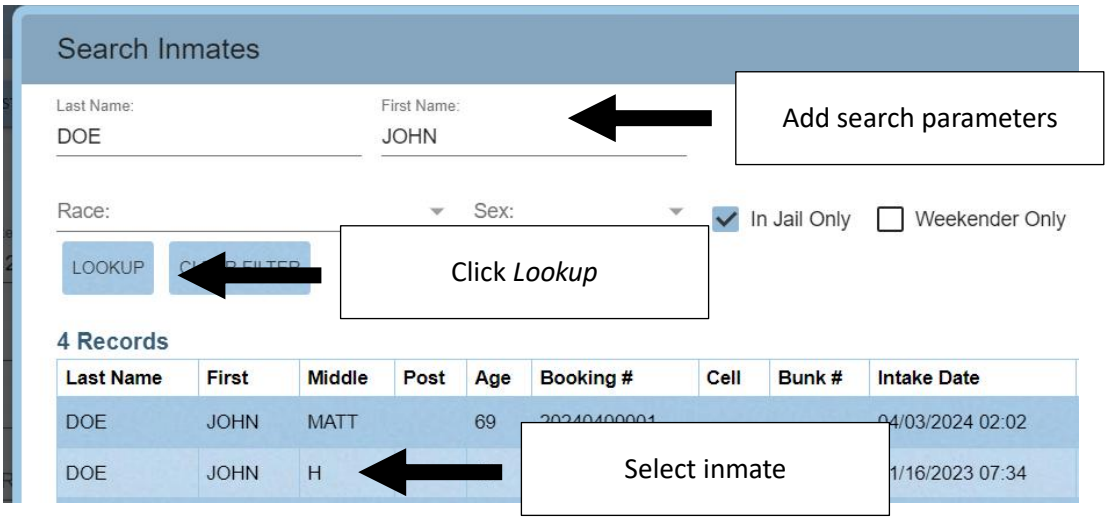
Adding New Money Receipts

To add a new money receipt, click **New Receipt** in the upper right corner.



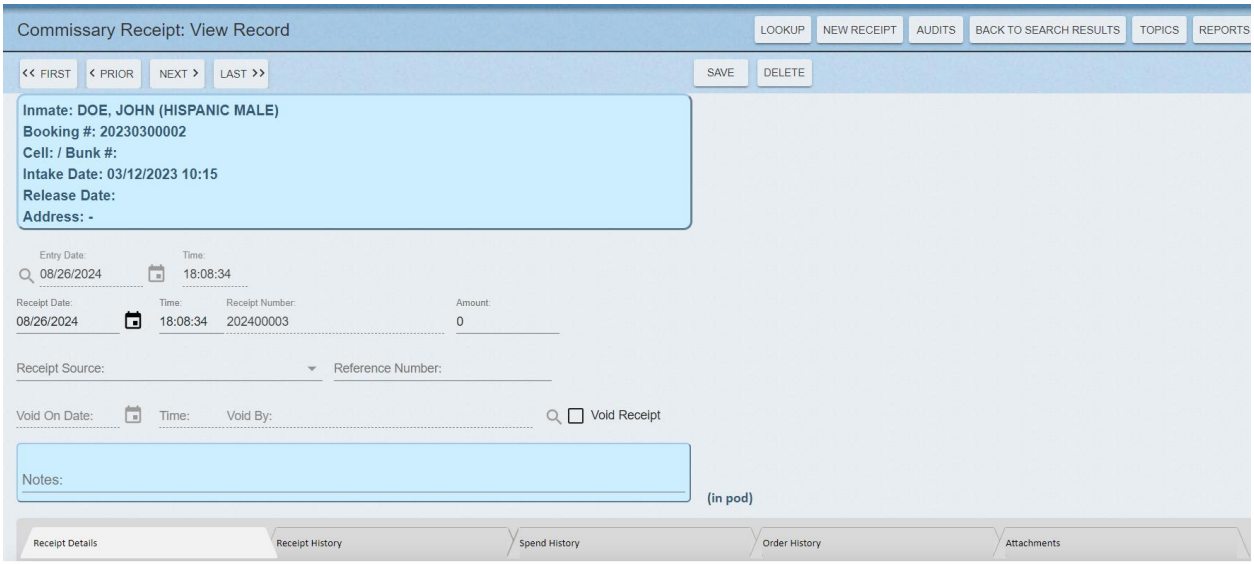
Find the inmate who is receiving the money by clicking the Magnifying Glass Icon . This will open a search screen where you should search for the inmate with identifying information.





After confirming you want to add a new receipt record, you will be brought to a screen where you can add information on the transaction you want to add.

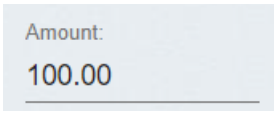
IMPORTANT: Optional items will be listed in **blue**. You can skip these items if not needed, or if you don't know if you need them.



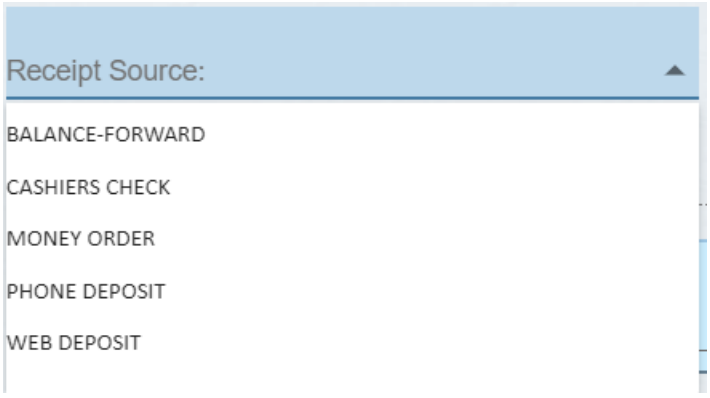
First, add the **Receipt Date** and **Time.**



Now add the **Amount** of money that was received.



Next, add the source of the money in the **Receipt Source** dropdown menu.



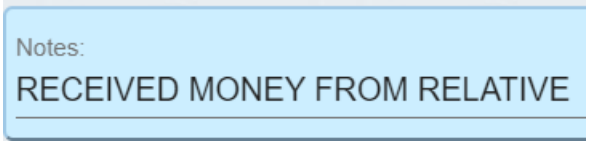
If you need to add a reference number, such as a transaction number, etc. then put that number in the **Reference Number** field.



If you need to void this receipt later, simply check **Void Receipt** to keep the record but remove the transaction from counting for the inmate's balance.



Finally, add any relevant notes in the **Notes** field and click **Save** at the top of the screen.



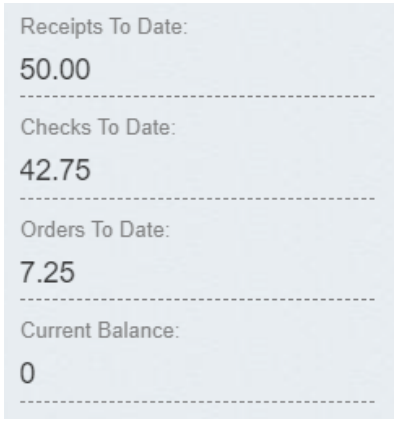


Receipt Tabs

The tabs for the *Receipts* module are not required for filling out a receipt record. Four of them are read-only, so only one **(Attachments)** allows you to actually add information. They are not required but can be used to reference information.



The **Receipt Details** lists all receipts, commissary orders, and checks dispersed to the inmate. It is **read only.**



Receipts to Date lists all money received.

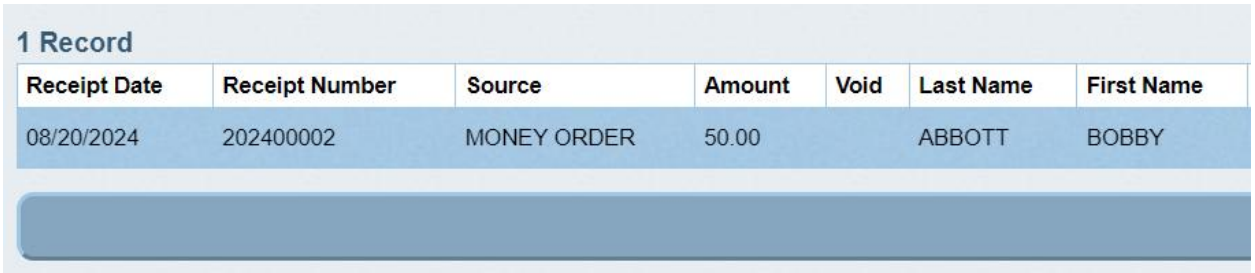
Checks to Date tells how much money has been paid out to the inmate, such as at release.

Orders to Date tells how much money has been spent in the commissary.

Current Balance takes the receipts and subtracts both checks and orders. This is the amount of money the inmate has now.

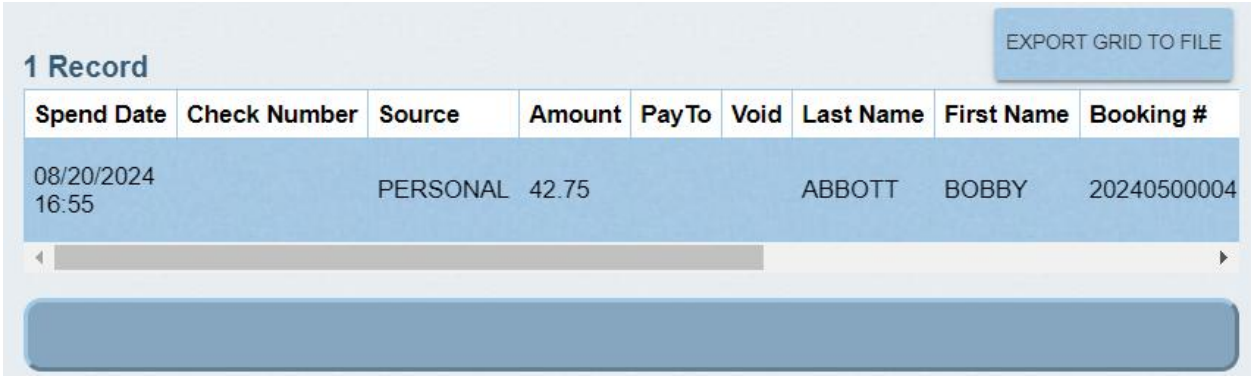


The **Receipt History** tab lists the details of all previous and current receipts. This lets you quickly view details of previous money received. **This tab is read only.** If you double-click on an entry from the table, it will open the receipt record in a new tab.



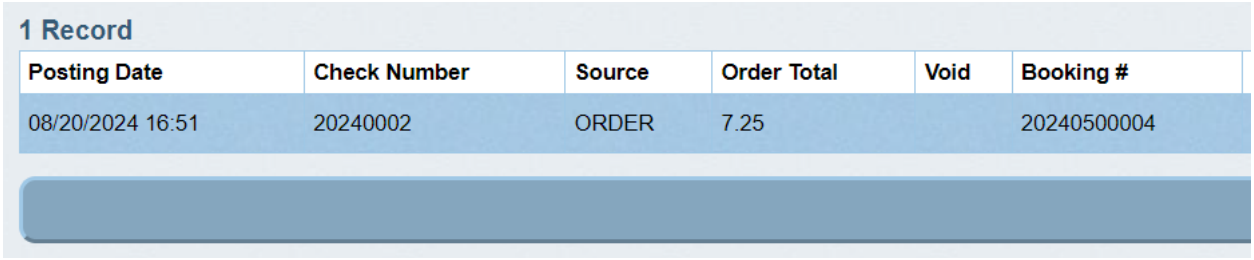


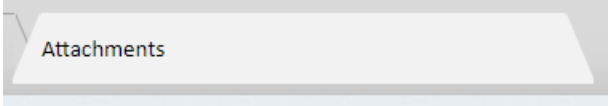
The **Spend History** tab lists the details of all previous and current spending orders for other reasons that are ***not*** the commissary, such as checks when the inmate is released. This lets you quickly view details of money paid out spent. **This tab is read only.** If you double-click on an entry from the table, it will open the individual (non-commissary) spending record in a new tab.





The **Order History** tab lists the details of all previous and current commissary spending. This lets you quickly view details of previous orders. **This tab is read only.** If you double-click on an entry from the table, it will open the record in a new tab.





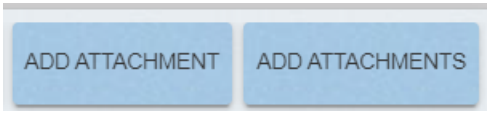
The **Attachments** tab lets you add and remove attachments related to this receipt, such as the check or money transfer for the inmate's receipt of the money.

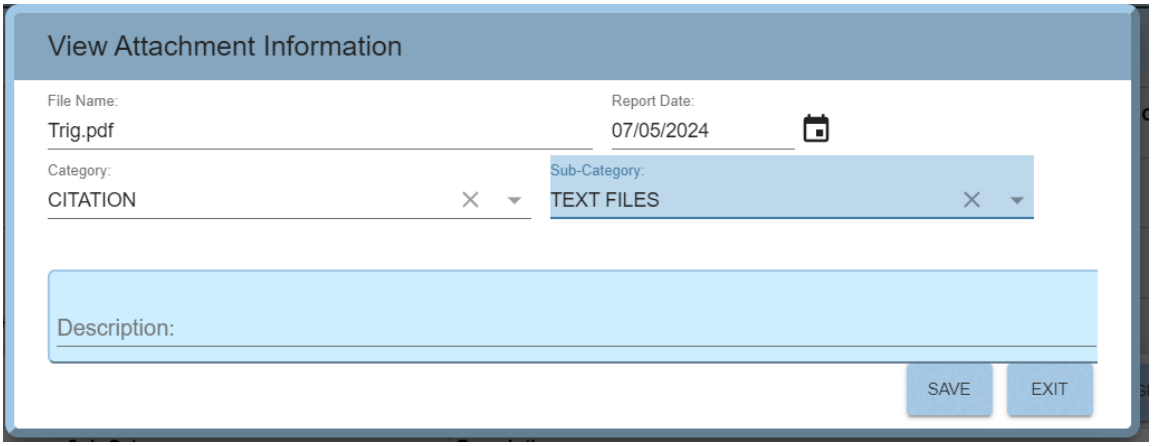
Double-click a file entry to view the record for the attachment or click on the icon to download the attachment to the computer.



You can add a single attachment at a time or multiple attachments at a time. Just like above with images, you will need the System Tray Installer downloaded to the computer you are using to add multiple attachments at once.

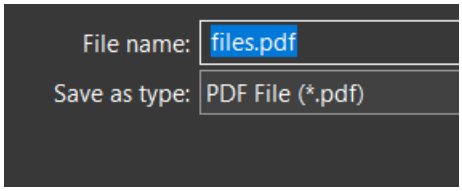
Click **Add Attachment** to add a single attachment or click **Add Attachments** to add multiple attachments at the same time. Choose the attachments from the computer, then add the appropriate category and sub-category for the file.



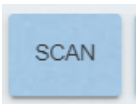


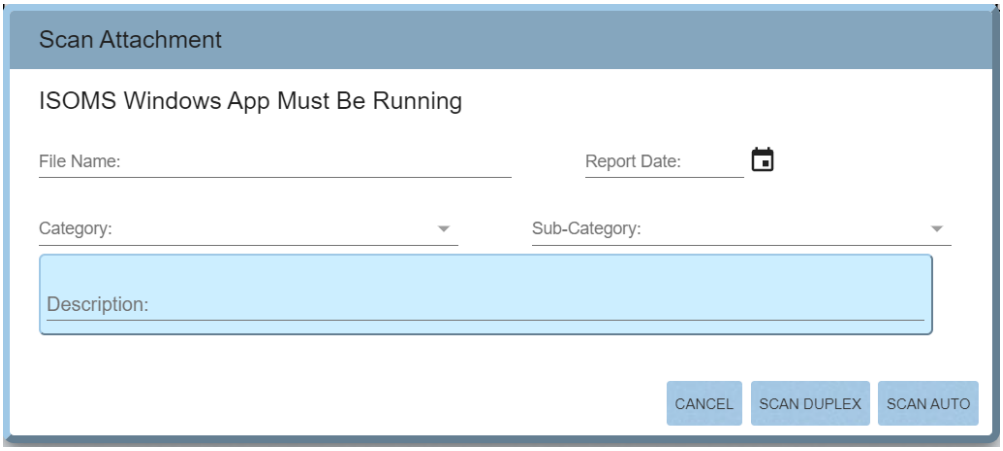
You can also **Download All PDFs** at once by clicking the appropriate button.





If you have the iSOMS Windows App, you can use **Scan** to scan files into the attachments.



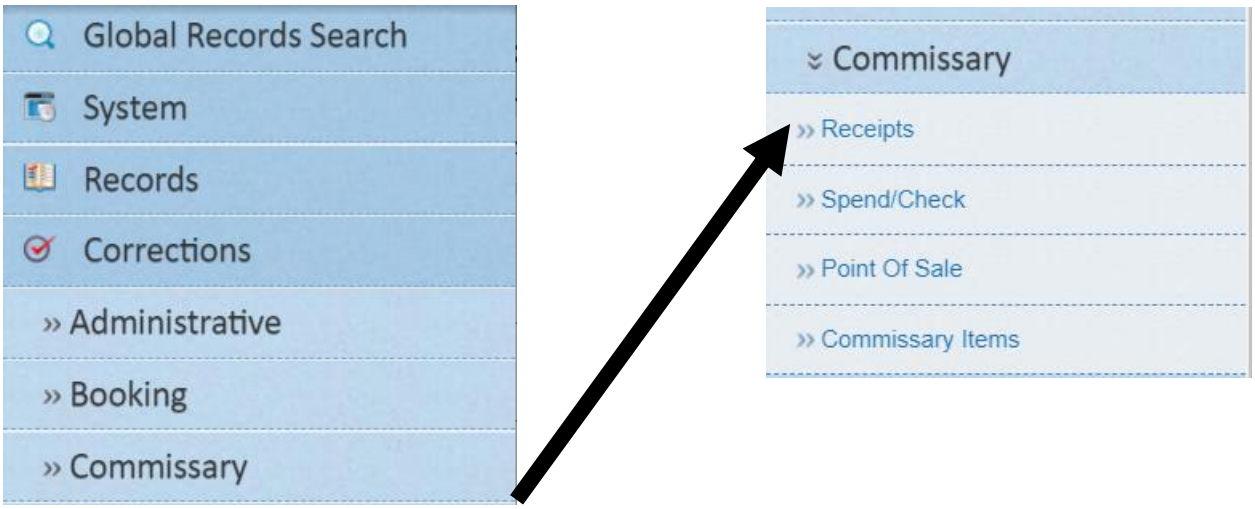


Commissary Receipt Reports

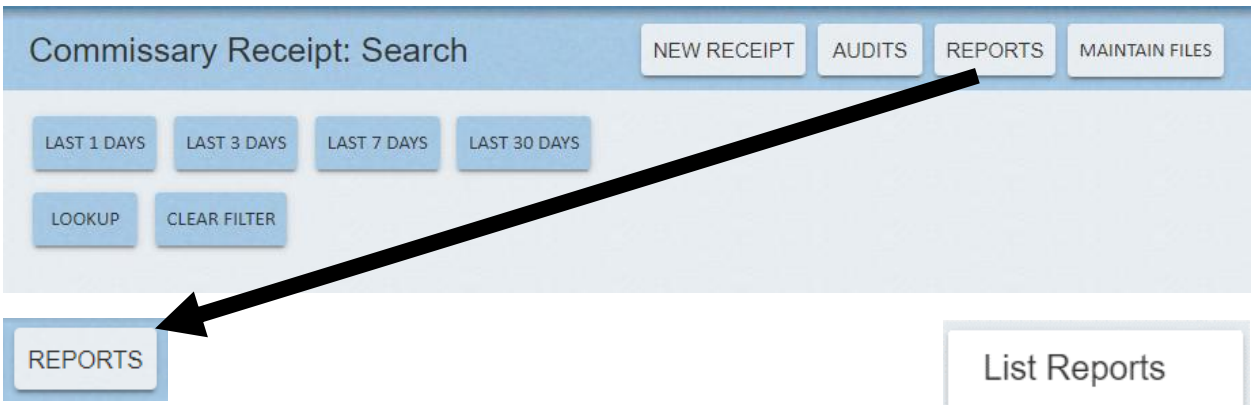
iSOMS has the capability to allow you to print a few different types of reports for commissary receipts.

To access the reports, begin on the iSOMS home screen. Click on the following:

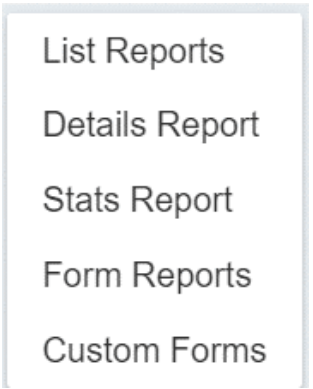
Corrections → Commissary → Receipts



Now click on the **Reports** button in the upper right corner.

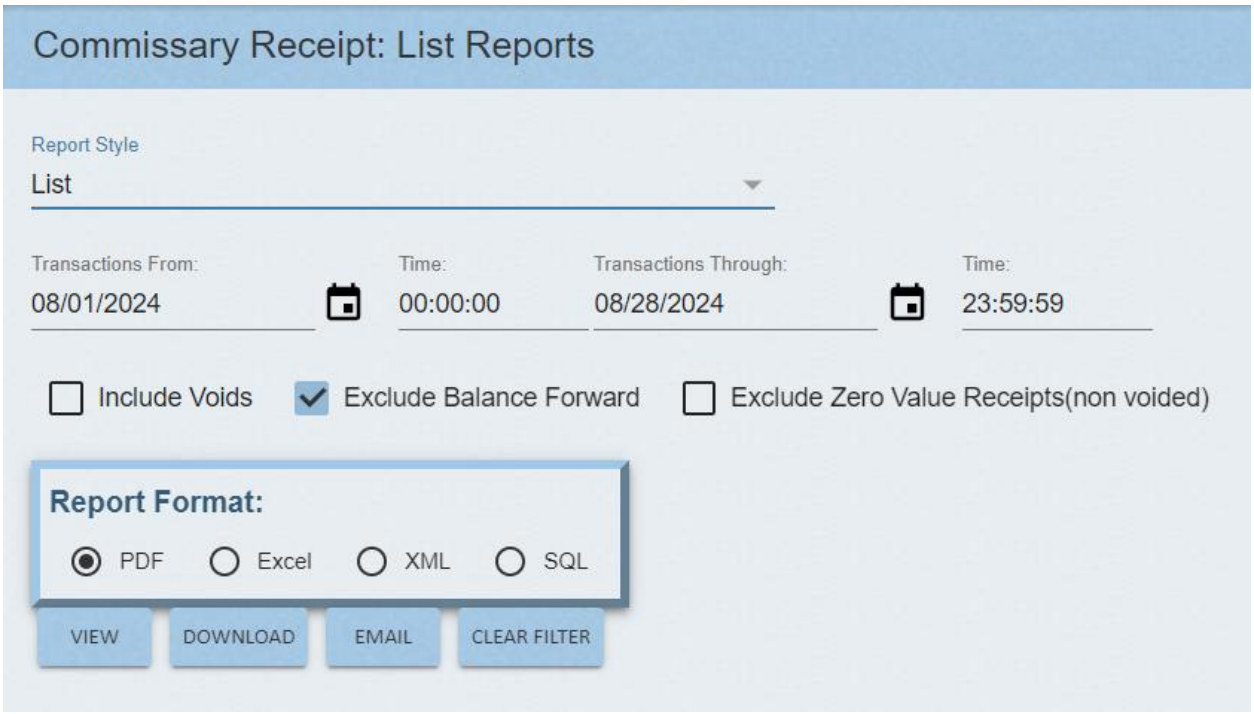


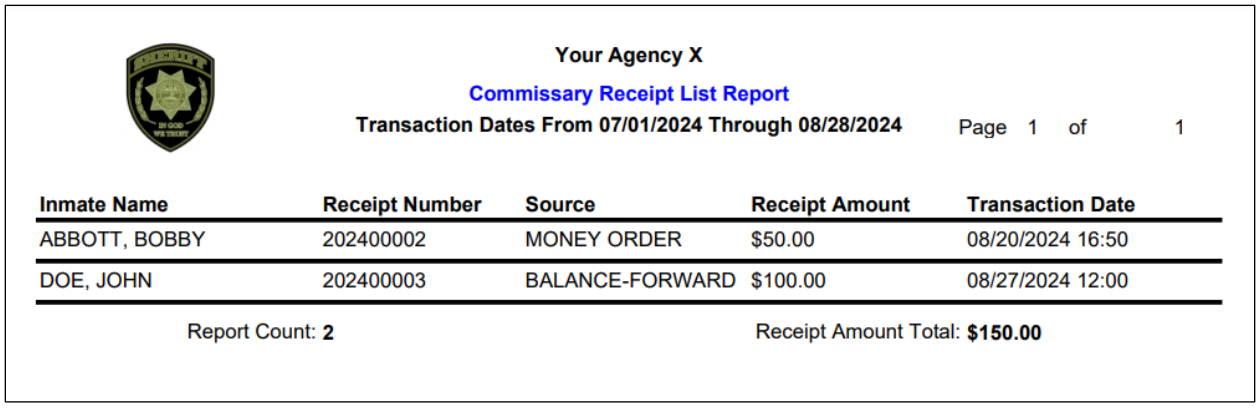
You can then choose from a few different options. List and Details reports are explained below.



List Reports

This report quickly displays all of the receipts in your iSOMS records so you can see an overview of money receipts for a certain date range. Add the start and end date in **Transactions from** and **Transactions through,** choose the **Report Style** for sorting purposes, and click **View** or **Download** to view the report.





Your Agency X

Commissary Receipt List Report

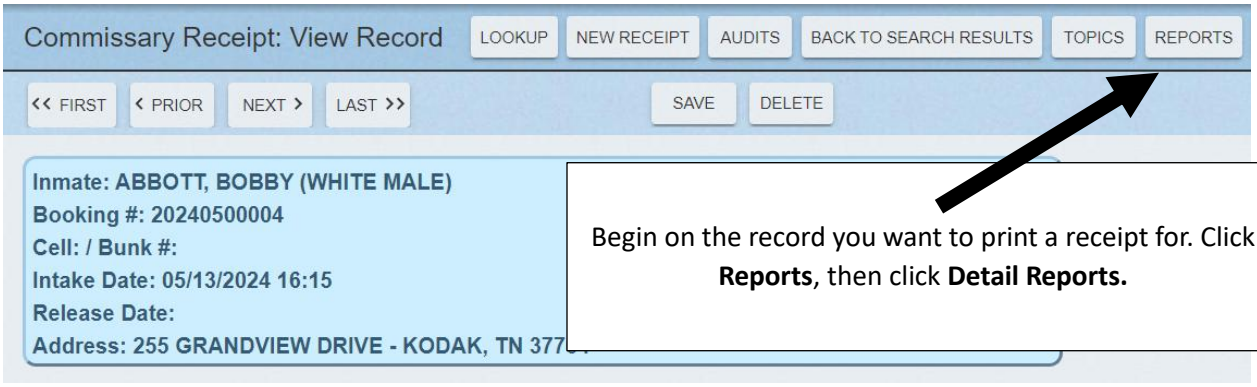
Transaction Dates From 07/01/2024 Through 08/28/2024 Page 1 of 1

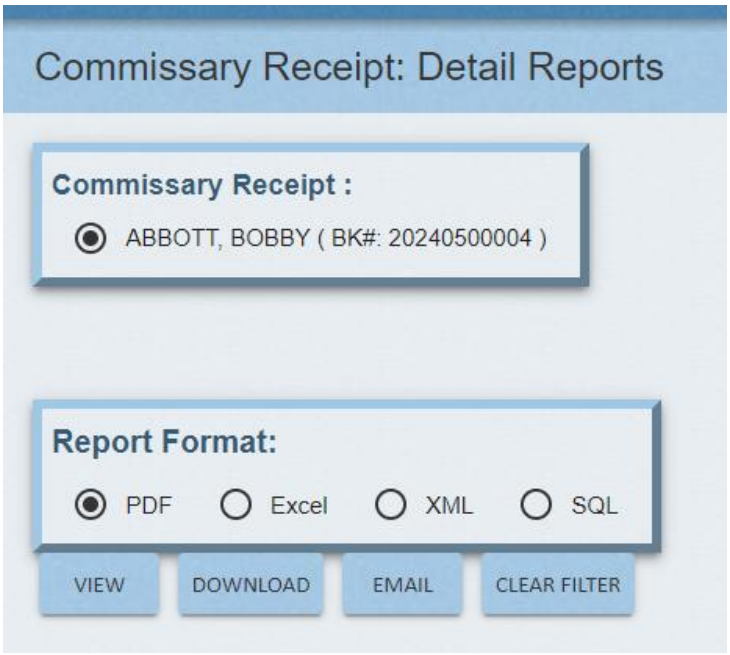
Inmate Name	Receipt Number	Source	Receipt Amount	Transaction Date
ABBOTT, BOBBY	202400002	MONEY ORDER	$50.00	08/20/2024 16:50
DOE, JOHN	202400003	BALANCE-FORWARD	$100.00	08/27/2024 12:00

Report Count: **2** Receipt Amount Total: **$150.00**

Detail Reports

This report lets you print a paper receipt (like a records receipt) so you can give it to the inmate or other relevant parties. First, find the transaction you want to create a receipt for, and then click **Reports → Detail Reports.** Now click **View** or **Download** to view the report.





Your Agency X

Commissary Receipts

Page 1 of 1

Receipt

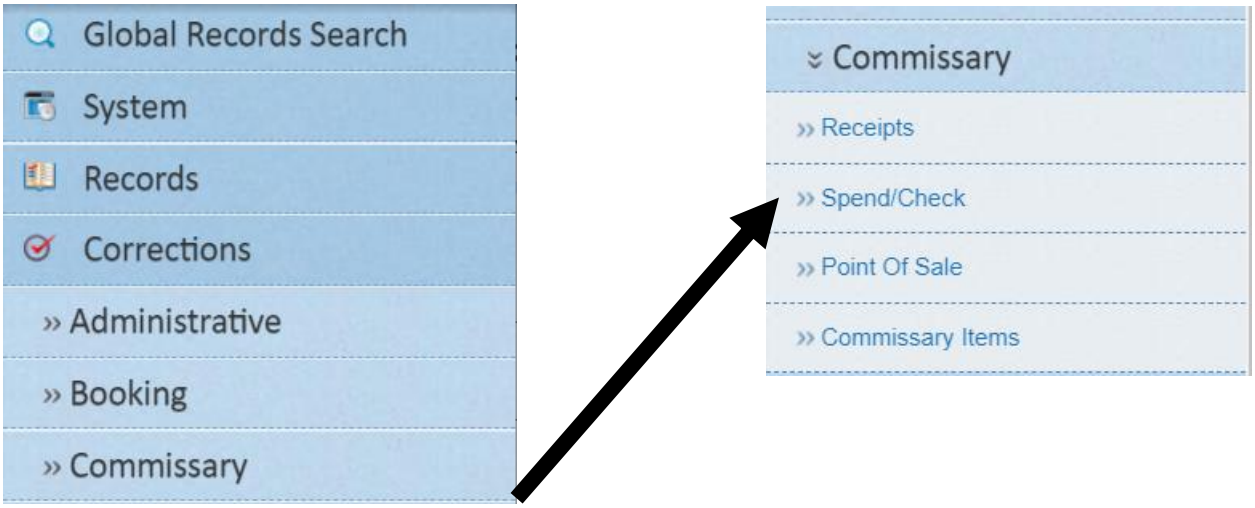
Name	Receipt Date	Receipt #	Balance Before	Payment Amount	Balance After
ABBOTT, BOBBY LEE	08/20/2024	202400002	$50.00	$50.00	$0.00

Spend/Check Records

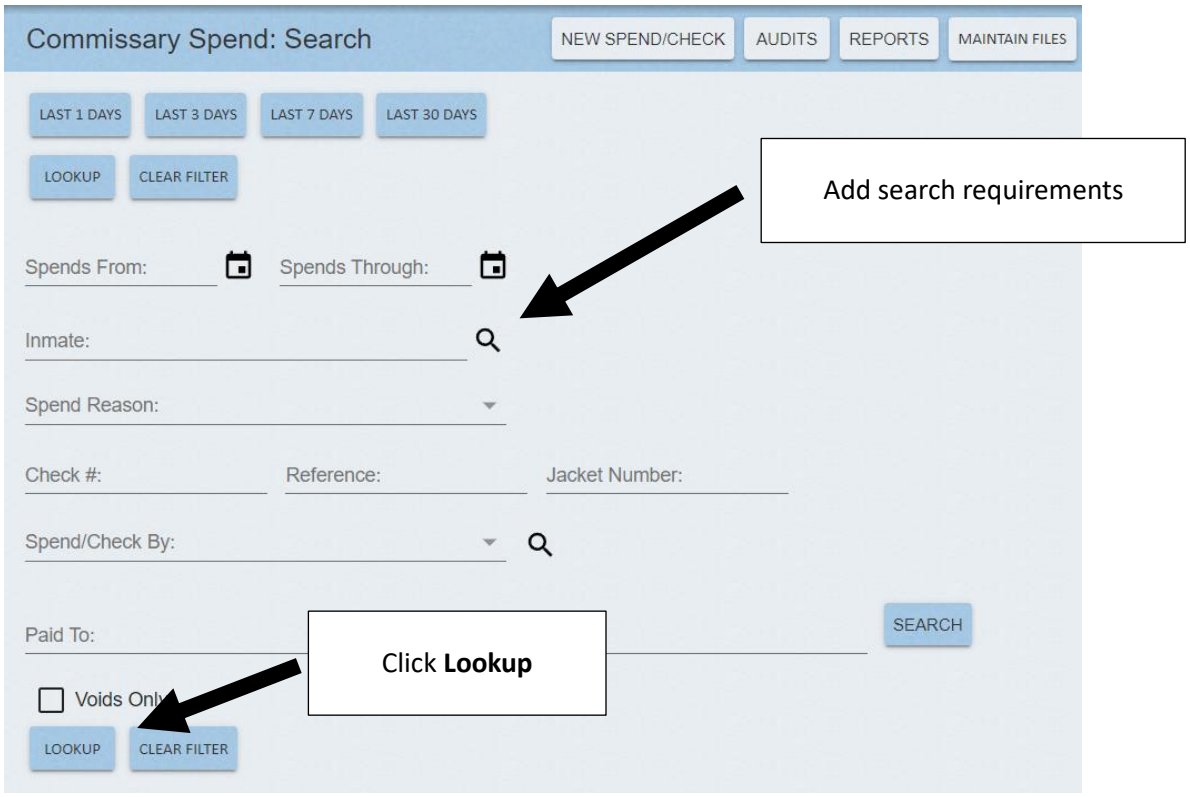
The **Spend/Check** section of the Commissary Module allows you to track the spending of money by inmates outside of the commissary, or it allows you to record when paying money back to the inmate, such as at release. These records record whenever an inmate's balance at the jail is *reduced,* except for when buying things in the commissary. Commissary spending is usually recording under *Point of Sale.* To access the **Spend/Check** module, begin on the iSOMS home screen.

Click on the following:

Corrections → Commissary → Spend/Check



This will open the **Commissary Spend: Search** screen. Here you can look up records of previous spending or payouts of money. To look up a record of non-commissary spending, type in the search filter fields and click on one of the **Lookup** buttons.

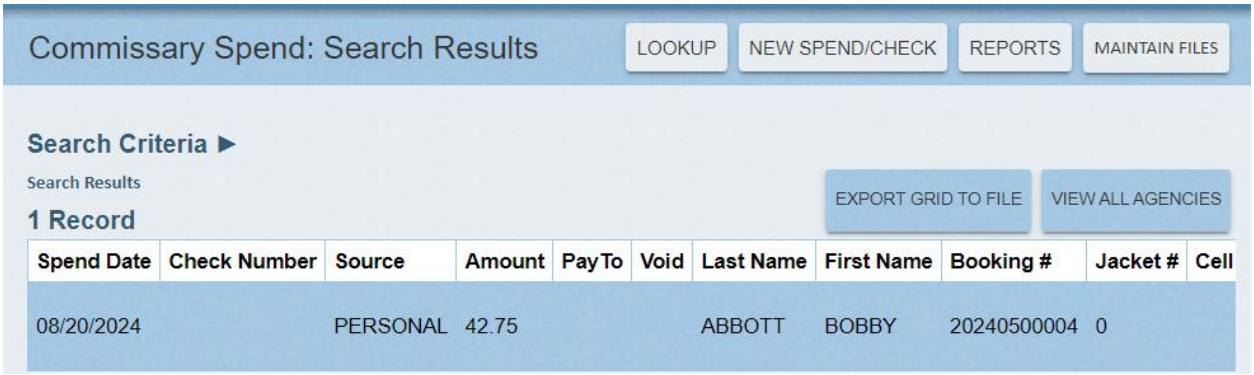


Quick Searches

If you want to do a quick search to find all non-commissary spending records in the past set days, use the buttons to find records in the time range. You can search the past one, three, seven, and thirty days.

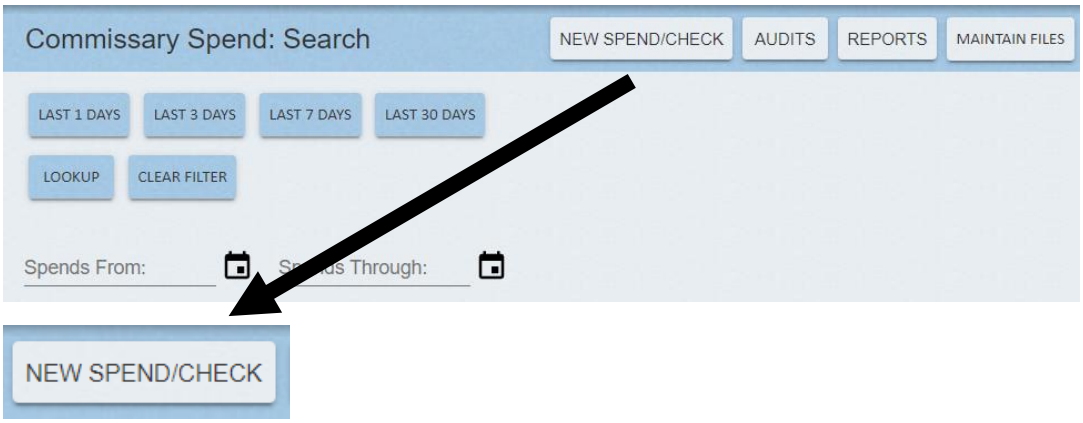


Whether you did a quick search or a standard search, you can double click on the entry or click on the pencil icon ( ) to open the screen to view, edit, or delete it.

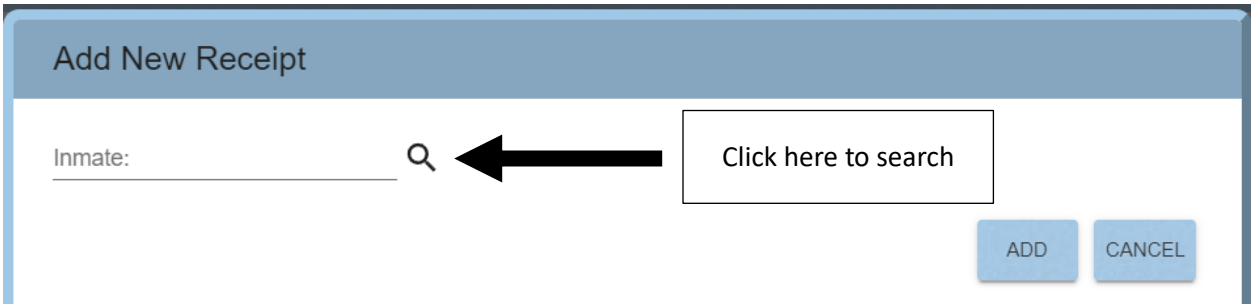


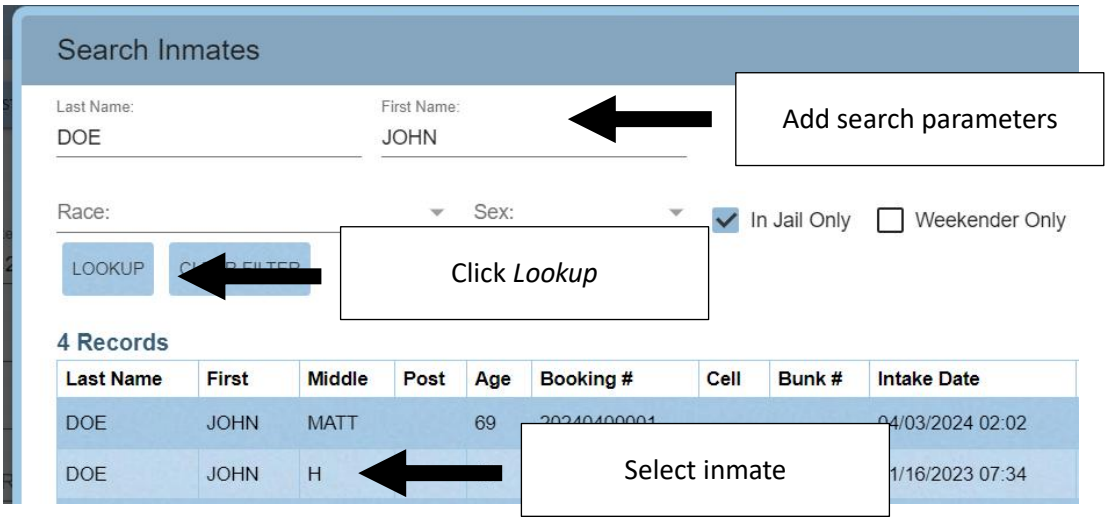
Adding New Spending / Check Records

To add a new spend or check, click **New Spend/Check** in the upper right corner.



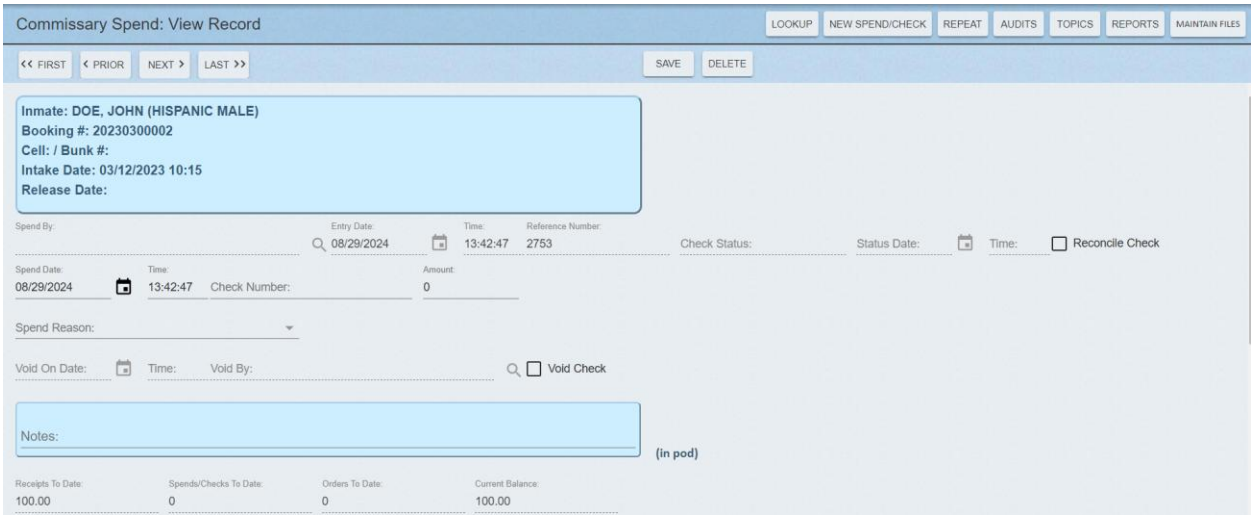
Find the inmate who is spending (or, in the case of a check, being paid out) the money by clicking the Magnifying Glass Icon 🔍 . This will open a search screen where you should search for the inmate with identifying information.





After confirming you want to add a new spend/check record, you will be brought to a screen where you can add information on the transaction you want to add.

IMPORTANT: Optional items will be listed in **blue**. You can skip these items if not needed, or if you don't know if you need them.



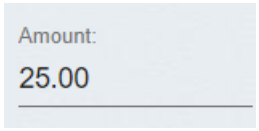
First, add the **Spend Date** and **Time.**



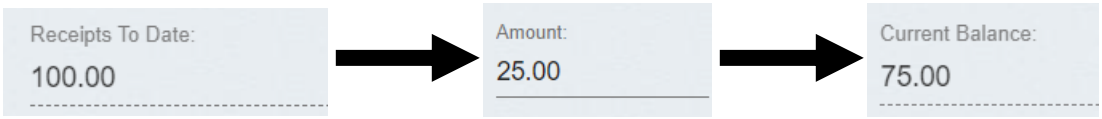
Next, if a check is being written, add the **Check Number**.



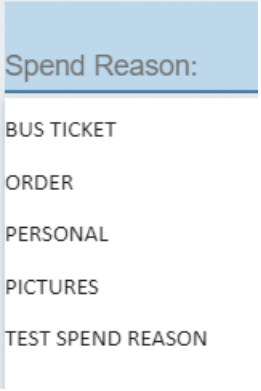
Now add the **Amount** of money that was spent or written on the check. This amount will reduce the inmate's balance, as the money was paid out to the inmate or other party.



*Example: The inmate previously received $100, which was recorded in the **Receipts** module. Now the inmate is spending $25 on a non-commissary purchase. The inmate's new balance is $75.*



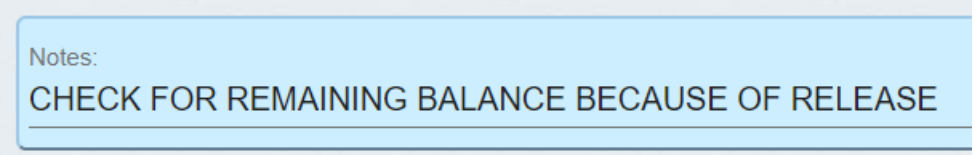
Next, add the reason for the spending / check in the **Spend Reason** dropdown menu.

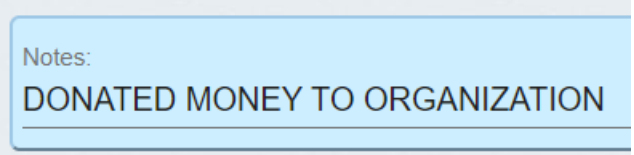


If you need to void this receipt later, simply check **Void Check** to keep the record but remove the transaction from counting for the inmate's balance.

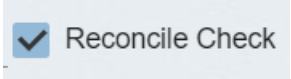


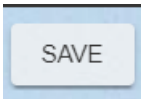
Now add any relevant notes in the **Notes** field.





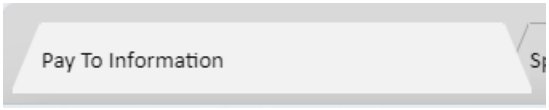
IMPORTANT: The final step is to click **Reconcile Check** near the fields on the right. This is **required** to have the balance update in iSOMS. Don't forget to check this box and then click **Save. After saving, you will need to continue to the Pay To Information tab to write to whom the check is being paid.**





Spend/Check Tabs

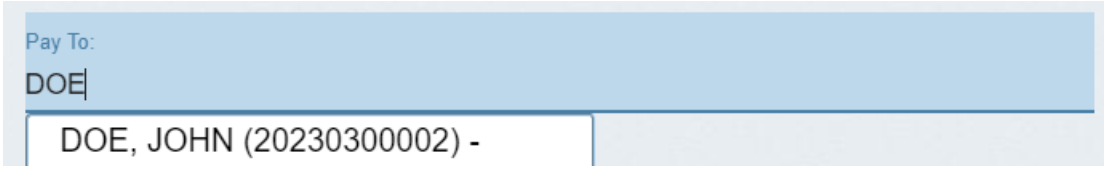
The **Pay To Information** tab should be filled out every time you add a new spend/check record so you can keep track of who receives the money spent. The other tabs for the *Spend/Check* module are not required for filling out a spend record. Four of them are read-only, so only **Pay To Information** and **Attachments** allow you to actually add information. Attachments are not required but can be used to reference information or to store check images.



IMPORTANT: The **Pay To Information** tab allows you to record to whom the check is being paid.

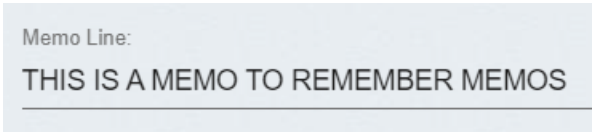


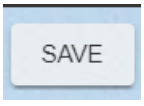
If you want to search for someone already in your system, simply type in the **Pay To** field, and iSOMS will search for the person. You can then click on their name to select them.



If you want to do a more detailed search, click **Search,** fill out the fields, and click **Lookup**.

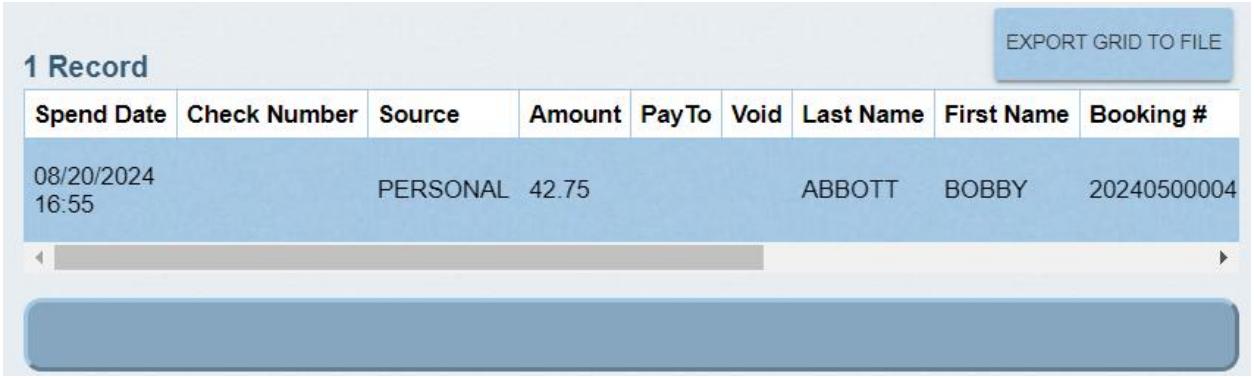
Make sure to add any desired memos in the **Memos Line** and then **Save** the record.





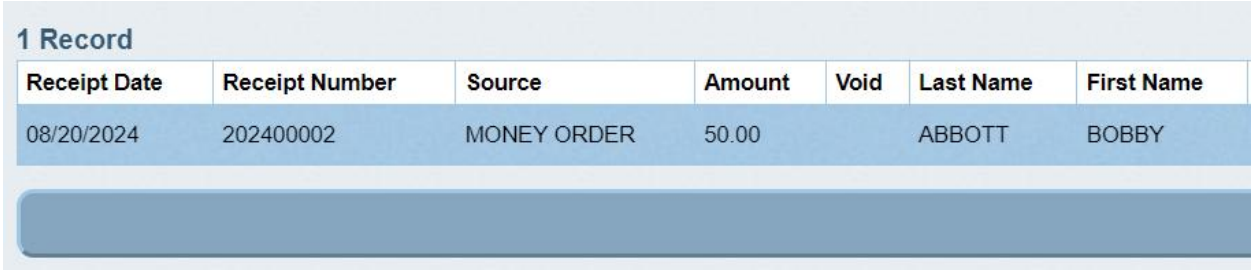


The **Spend History** tab lists the details of all previous and current spending orders for other reasons that are ***not*** the commissary, such as checks when the inmate is released. This lets you quickly view details of money paid out spent. **This tab is read only.** If you double-click on an entry from the table, it will open the individual (non-commissary) spending record in a new tab.



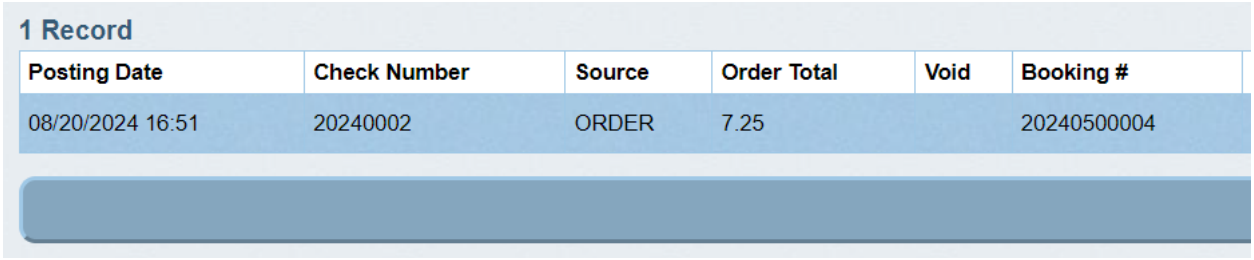


The **Receipt History** tab lists the details of all previous and current receipts. This lets you quickly view details of previous money received. **This tab is read only.** If you double-click on an entry from the table, it will open the receipt record in a new tab.



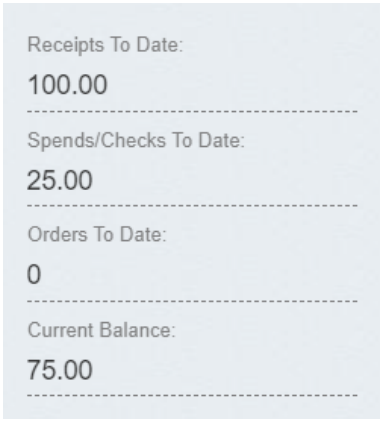


The **Order History** tab lists the details of all previous and current commissary spending. This lets you quickly view details of previous orders. **This tab is read only.** If you double-click on an entry from the table, it will open the record in a new tab.





The **Info** tab lists all receipts, commissary orders, and checks dispersed to the inmate. It is **read only.**

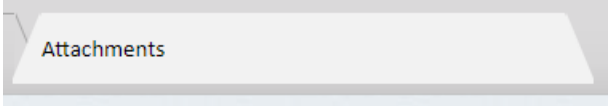


Receipts to Date lists all money received.

Spends/Checks to Date tells how much money has been paid out to the inmate, such as at release.

Orders to Date tells how much money has been spent in the commissary.

Current Balance takes the receipts and subtracts both checks and orders. This is the amount of money the inmate has now.



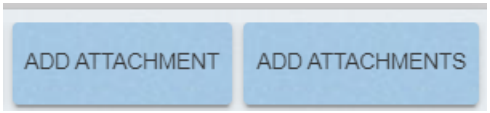
The **Attachments** tab lets you add and remove attachments related to this spend/check record, such as the check or money transfer for the inmate's spending of the money.

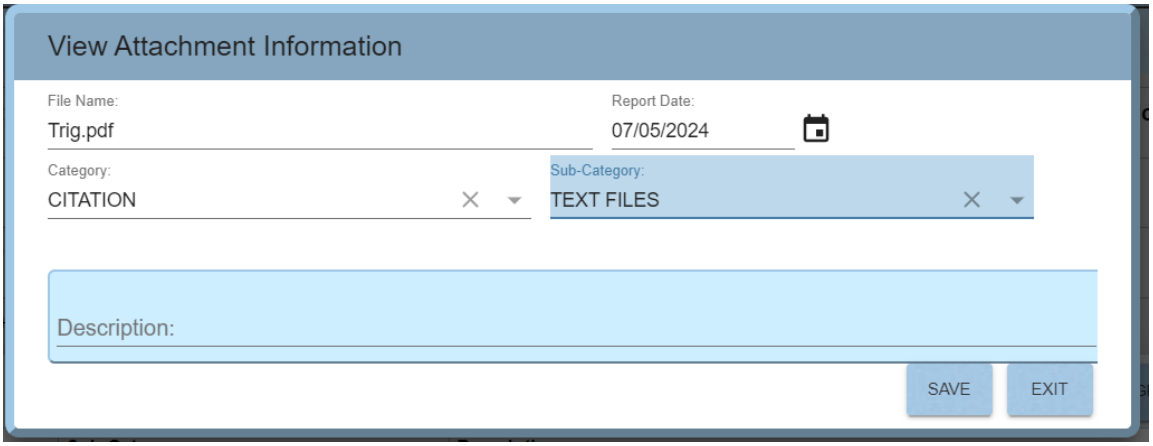
Double-click a file entry to view the record for the attachment or click on the icon to download the attachment to the computer.



You can add a single attachment at a time or multiple attachments at a time. Just like above with images, you will need the System Tray Installer downloaded to the computer you are using to add multiple attachments at once.

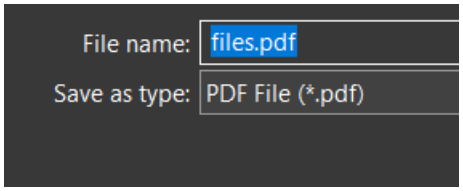
Click **Add Attachment** to add a single attachment or click **Add Attachments** to add multiple attachments at the same time. Choose the attachments from the computer, then add the appropriate category and sub-category for the file.



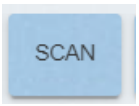


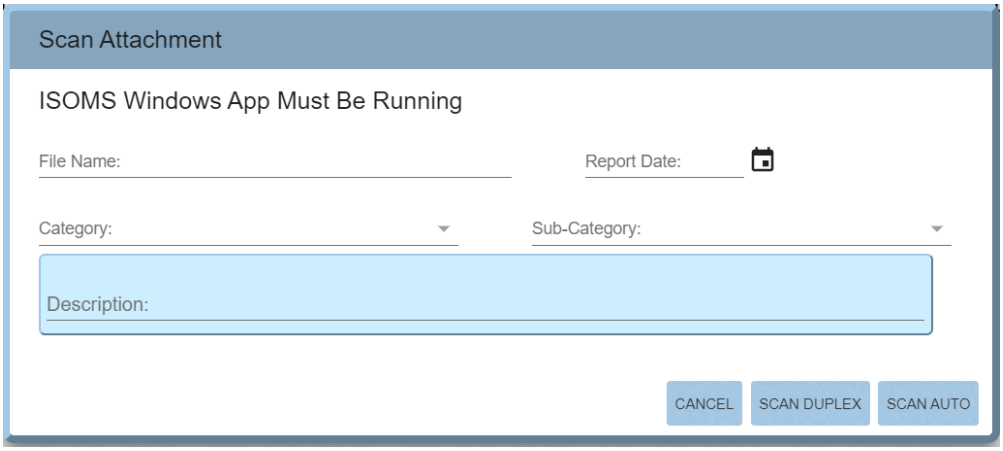
You can also **Download All PDFs** at once by clicking the appropriate button.





If you have the iSOMS Windows App, you can use **Scan** to scan files into the attachments.



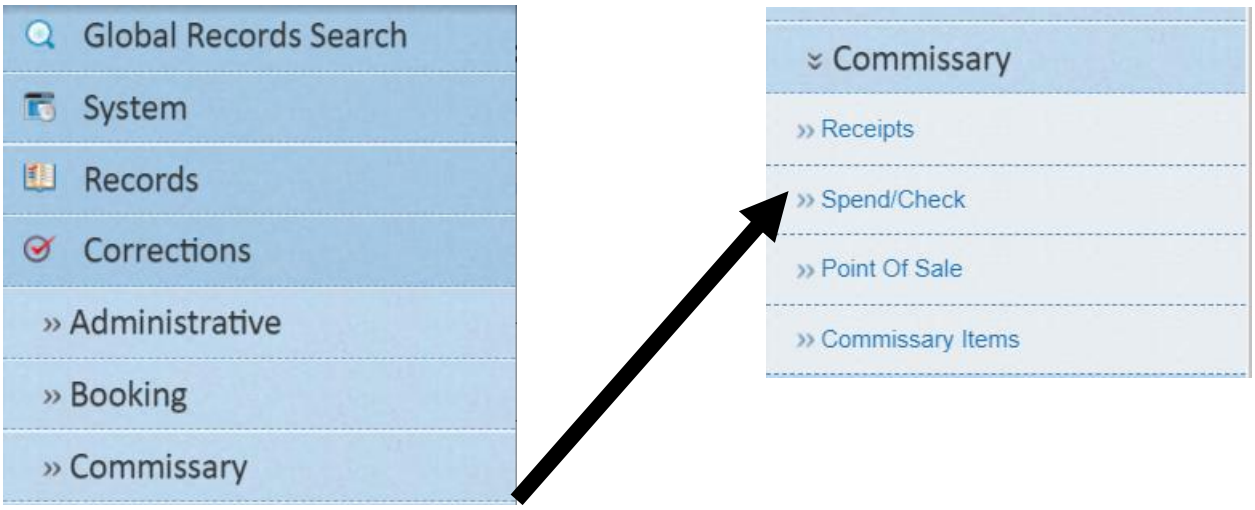


Spend/Check Reports

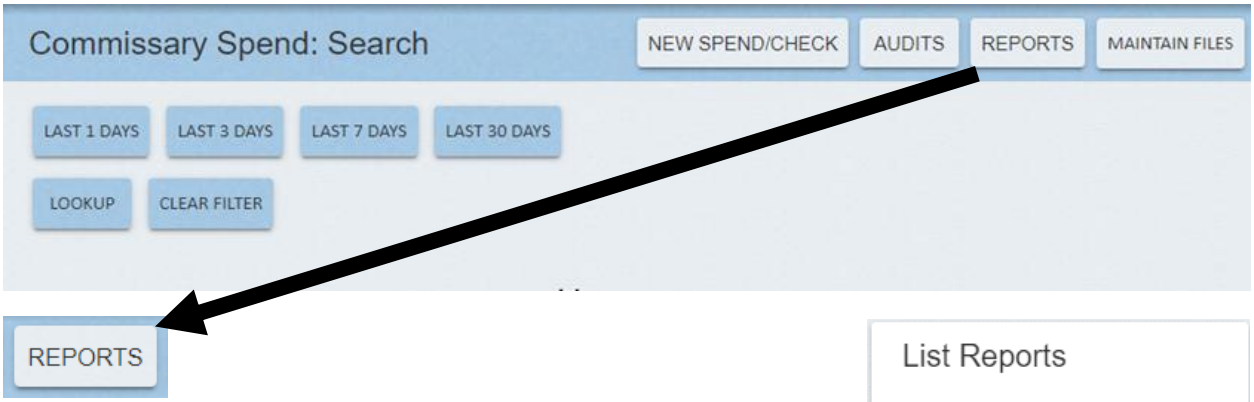
iSOMS has the capability to allow you to print several different types of reports for commissary receipts.

To access the reports, begin on the iSOMS home screen. Click on the following:

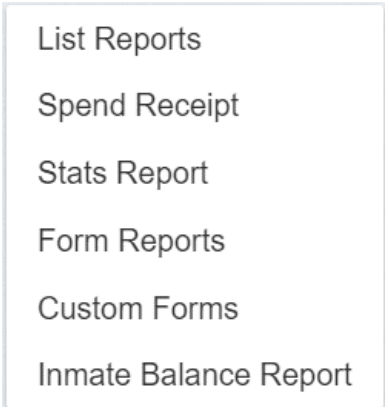
Corrections → Commissary → Spend/Check



Now click on the **Reports** button in the upper right corner.

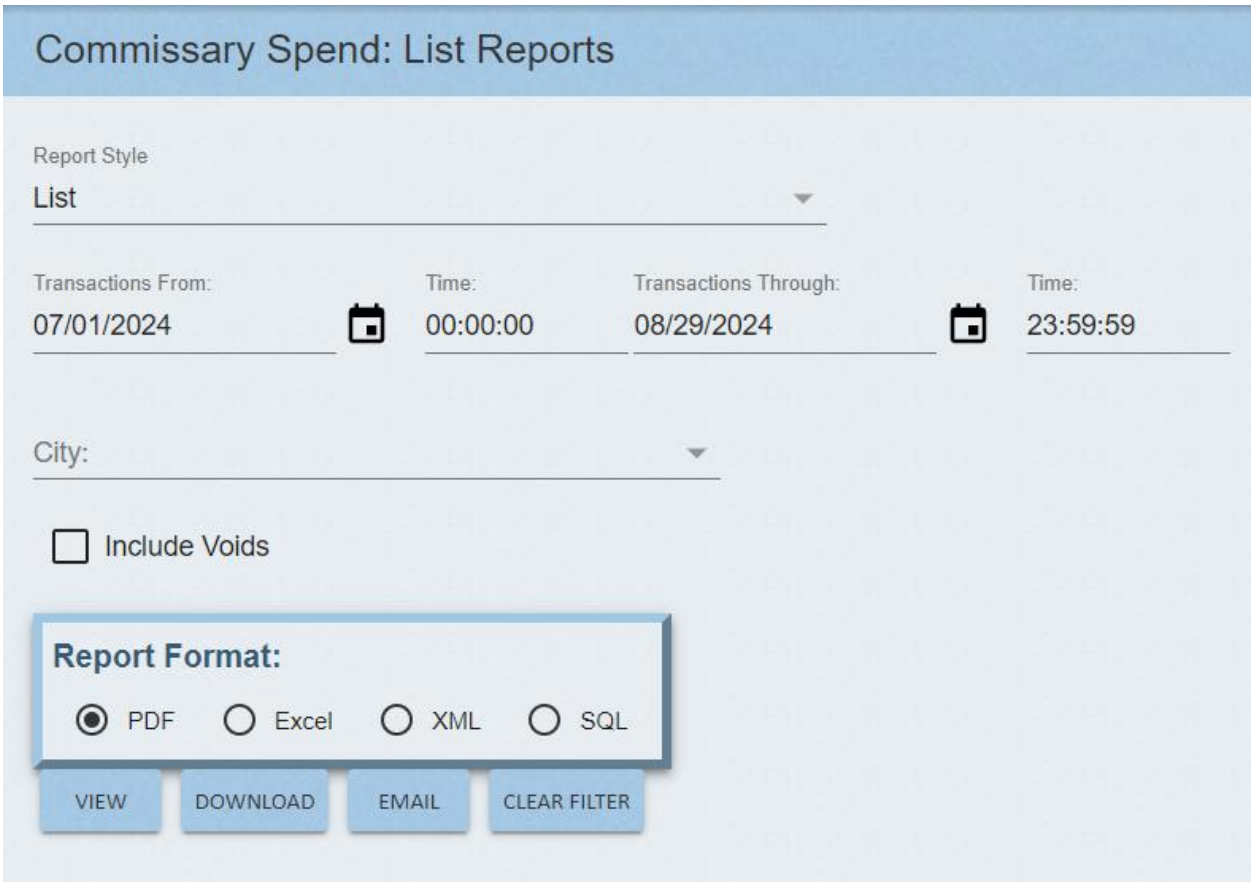


You can then choose from a few different options. List, Spend Receipt, and Inmate Balance reports are explained below.



List Reports

This report quickly displays all of the spend/check records in your iSOMS system so you can see an overview of non-commissary spending for a certain date range. Add the start and end date in **Transactions from** and **Transactions through,** choose the **Report Style** for sorting purposes, and click **View** or **Download** to view the report.



Your Agency X

Commissary Spend List Report

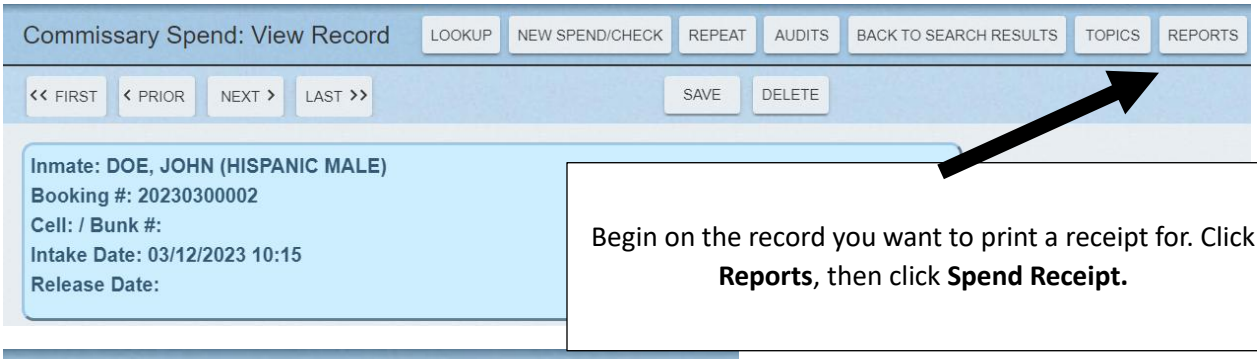
Transaction Dates From 07/01/2024 Through 08/29/2024 Page 1 of 1

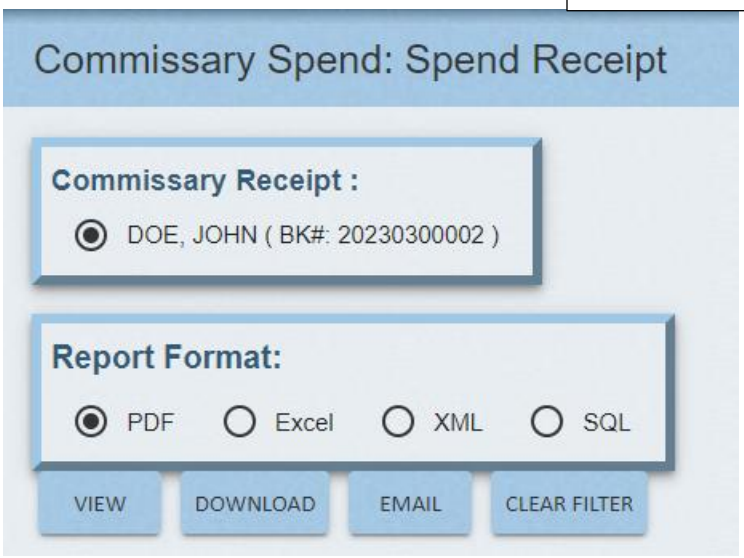
Inmate Name	Spend Reason	Spend Amount	Transaction Date
ABBOTT, BOBBY	PERSONAL	$42.75	08/20/2024 16:55
DOE, JOHN	PERSONAL	$25.00	08/29/2024 13:42

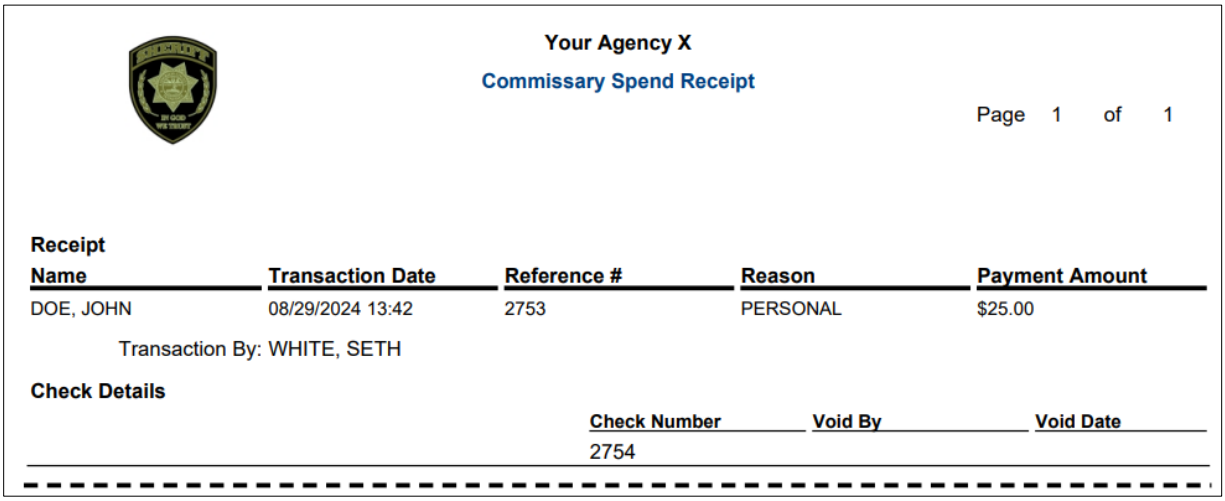
Report Count: **2** Spend Amount Total: **$67.75**

Spend Receipt

This report lets you print a paper receipt (like a records receipt) so you can give it to the inmate or other relevant parties. First, find the transaction you want to create a receipt for, and then click **Reports → Spend Receipt.** Now click **View** or **Download** to view the report.







Your Agency X

Commissary Spend Receipt

Page 1 of 1

Receipt

Name	Transaction Date	Reference #	Reason	Payment Amount
DOE, JOHN	08/29/2024 13:42	2753	PERSONAL	$25.00

Transaction By: WHITE, SETH

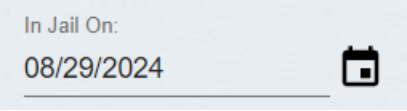
Check Details

Check Number	Void By	Void Date
2754		

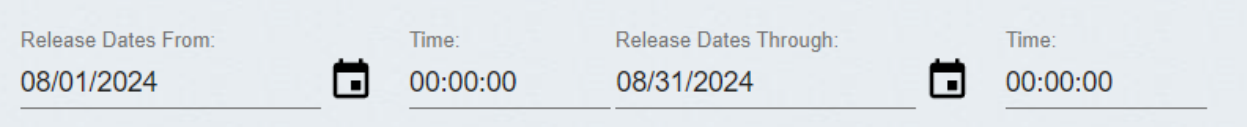
Inmate Balance Reports

This report displays all of the balance records in your iSOMS system so you can see the balance of inmates who are in jail or will be released. Pick one of the following options:

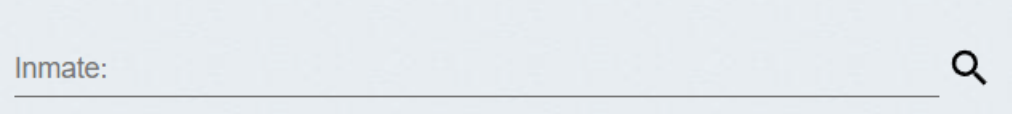
1. Pick a **In Jail On** date to view inmate balances who are in jail on a certain date (such as the current date).



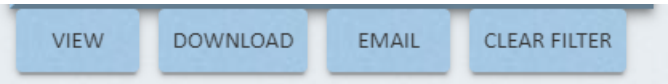
2. **Release Dates** lets you select a date range so you can see inmate balances who are going to be released at certain times.



3. Select an **individual** inmate to see their balance.



Add any additional desired filters, then click **View** or **Download** in the report.



Your Agency X

Inmate Balance Report

Page 1 of 1

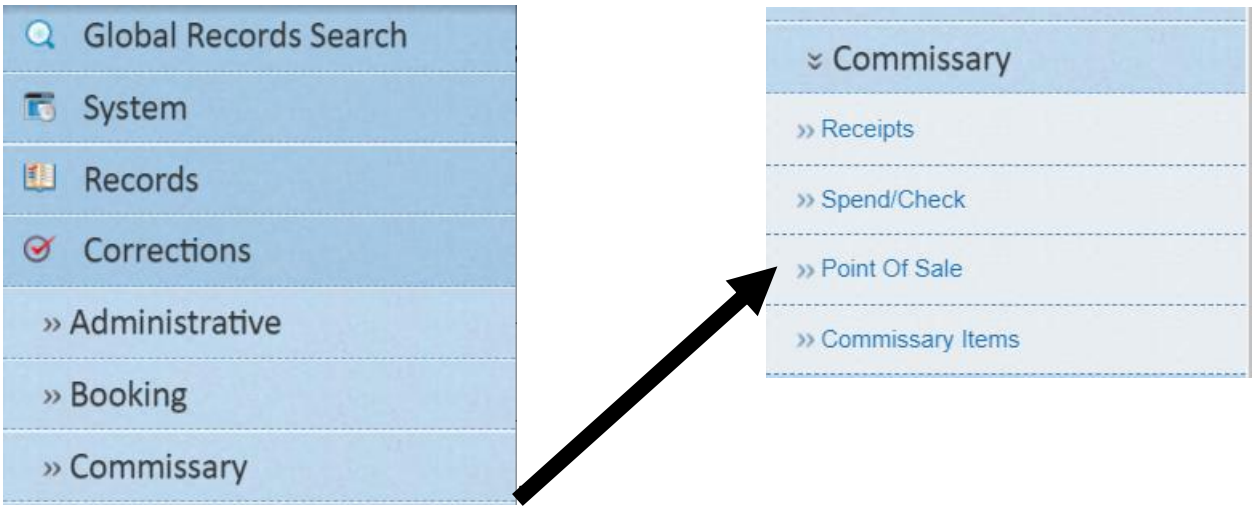
Inmate Name	Booking #	Jacket #	DOC #	DOB	Intake Date	Release Date	Balance
ABBOTT, DARREN	2015120002	5306	P12345	01/01/1965	12/16/2015 10:01		$998.81
BEAL, TIMOTHY	2006006253	3405		01/01/1965	10/30/2006 18:15		$100.01
CAMPBELL, ROBERT	2006003077	76103		01/01/1965	02/12/2022 09:59		$180.00
CARDONA, CRISTOBOL	2006007097	93545		01/01/1965	11/30/2006 15:00		$1.00
DOE, JOHN	20230300002	818222		01/15/1989	03/12/2023 10:15		$75.00
DOE, JOHN	20230100001	428677		01/01/1965	01/16/2023 07:34		$100.00
ELDER, BRIAN, JR	20120017	116169		01/01/1965	07/30/2013 15:06		$19.80
ELDER, CANDACE	20120015	92829			06/02/2015 11:55		$50.00

Point of Sale

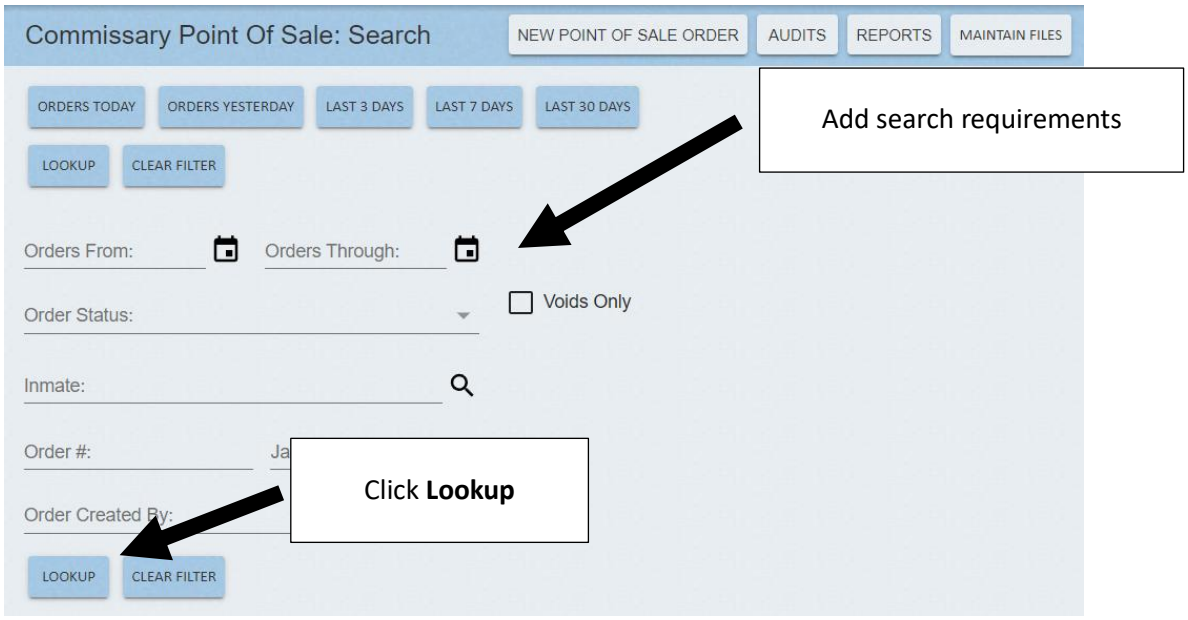
The **Point of Sale** section of the Commissary Module allows you to track the spending of money by inmates for the commissary. These records record whenever an inmate's balance at the jail is *reduced* when they are buying things in the commissary. To access the **Point of Sale** module, begin on the iSOMS home screen.

Click on the following:

Corrections → Commissary → Point of Sale

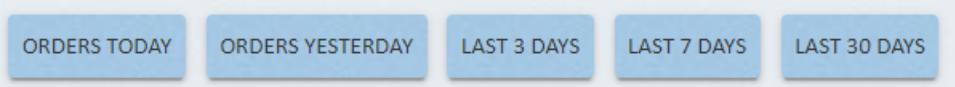


This will open the **Commissary Point of Sale: Search** screen. Here you can look up records of previous orders at the commissary. To look up a record of commissary spending, type in the search filter fields and click on one of the **Lookup** buttons.

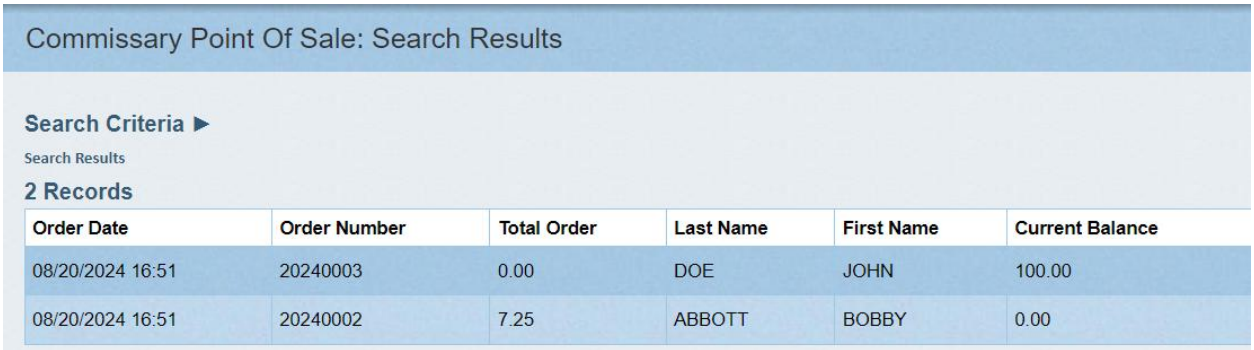


Quick Searches

If you want to do a quick search to find all commissary order records today or in the past set days, use the buttons to find records in the time range. You can search for today, yesterday, or the past three, seven, and thirty days.



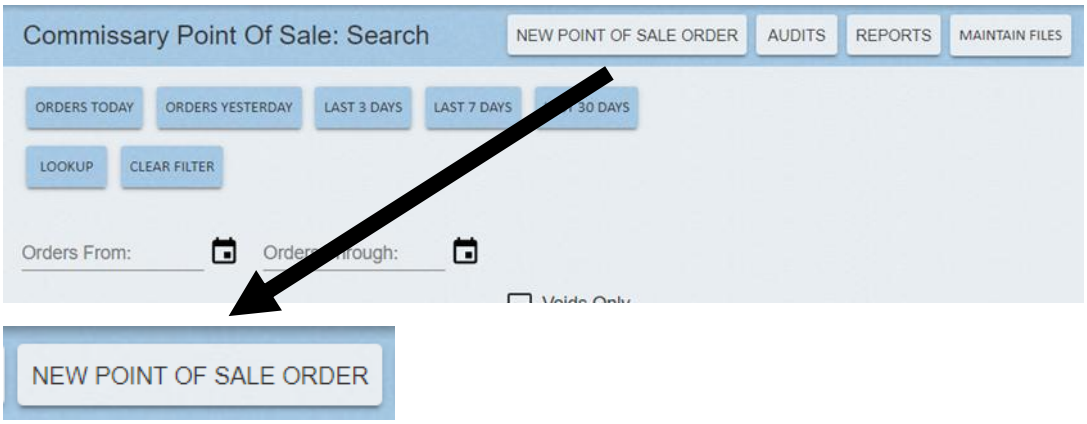
Whether you did a quick search or a standard search, you can double click on the entry or click on the pencil icon ( ) to open the screen to view, edit, or delete it.



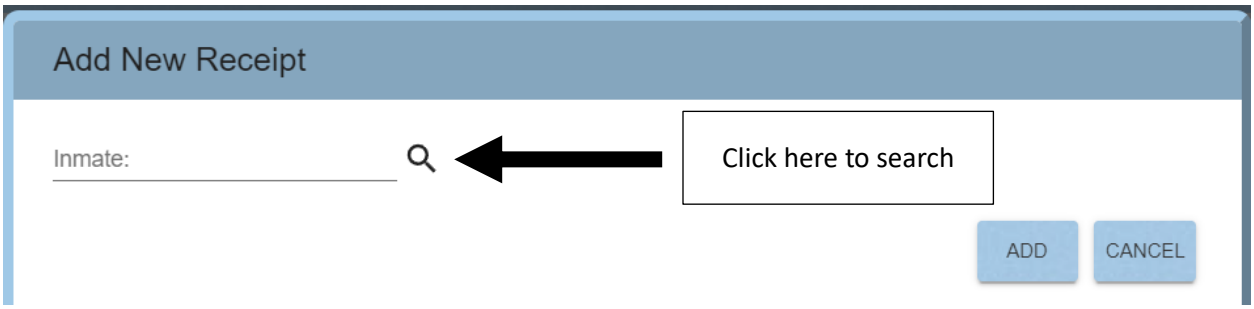
Order Date	Order Number	Total Order	Last Name	First Name	Current Balance
08/20/2024 16:51	20240003	0.00	DOE	JOHN	100.00
08/20/2024 16:51	20240002	7.25	ABBOTT	BOBBY	0.00

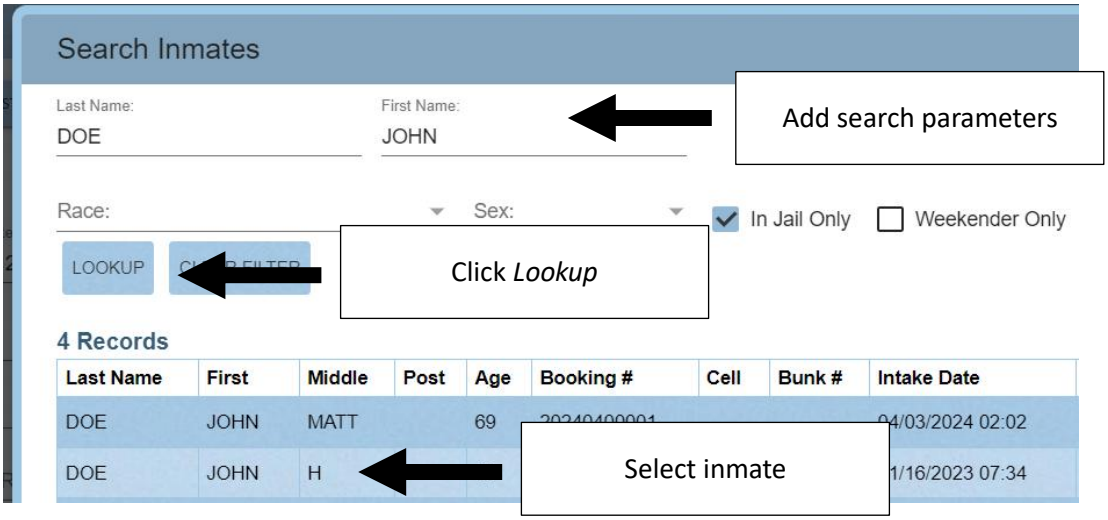
Adding New Point of Sale Records

To add a new point of sale order, click **New Point of Sale Order** in the upper right corner.



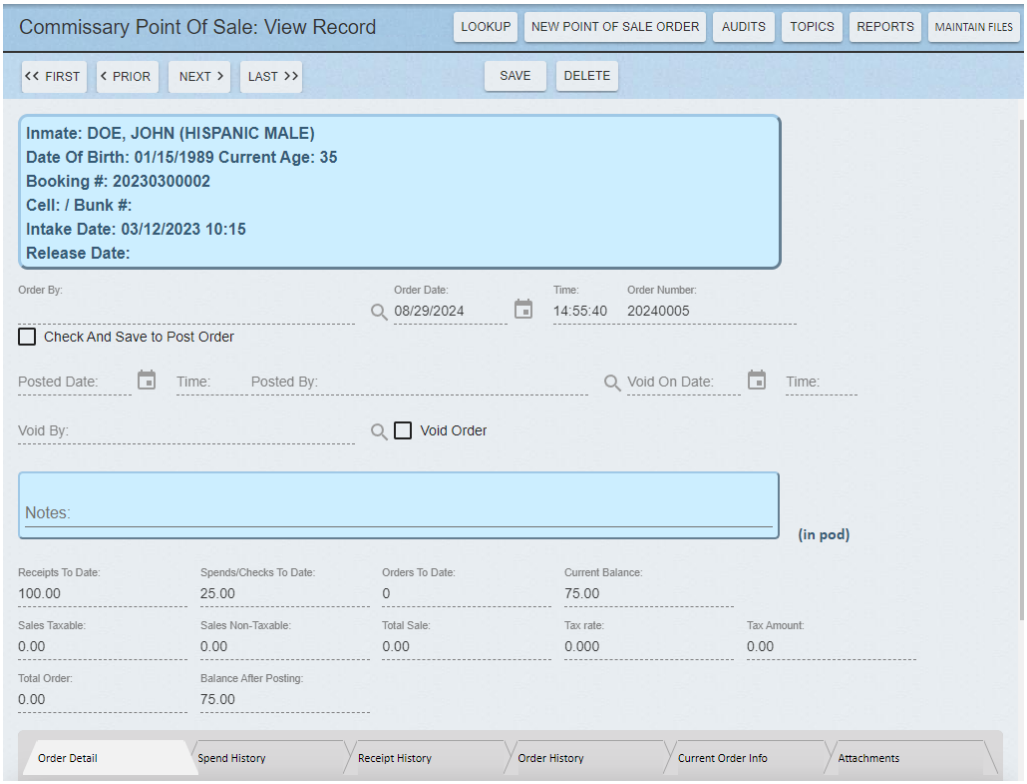
Find the inmate who is placing the commissary order by clicking the Magnifying Glass Icon . This will open a search screen where you should search for the inmate with identifying information.



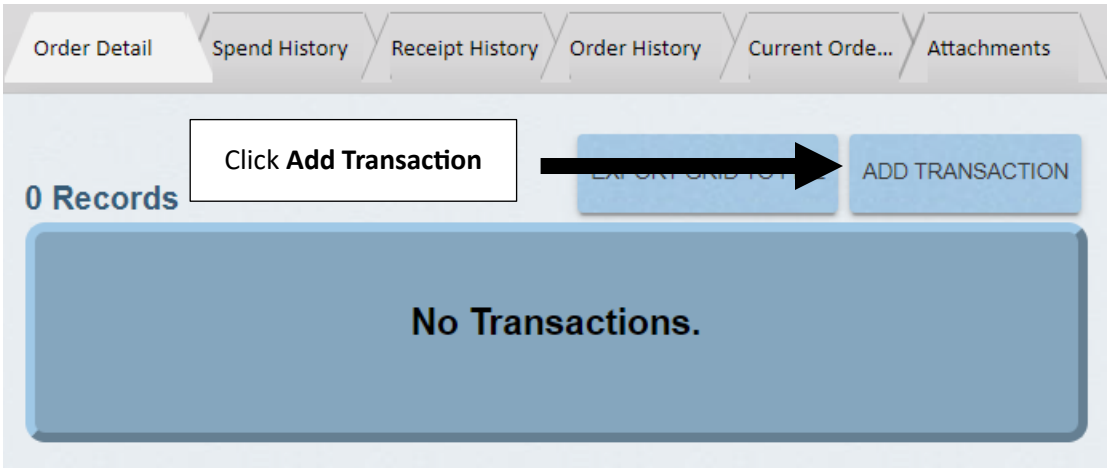


After confirming you want to add a new point of sale order, you will be brought to a screen where you can add information on the transaction you want to add.

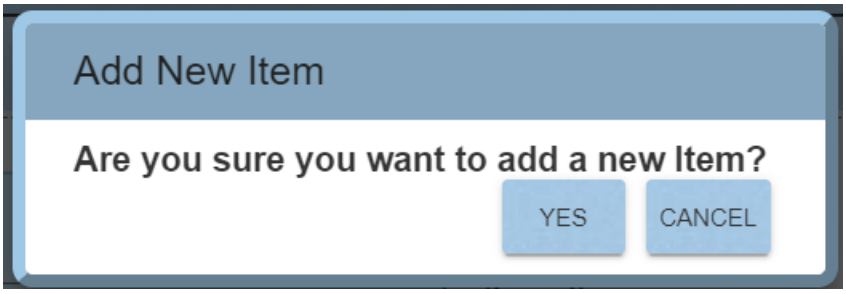
IMPORTANT: Optional items will be listed in **blue**. You can skip these items if not needed, or if you don't know if you need them.



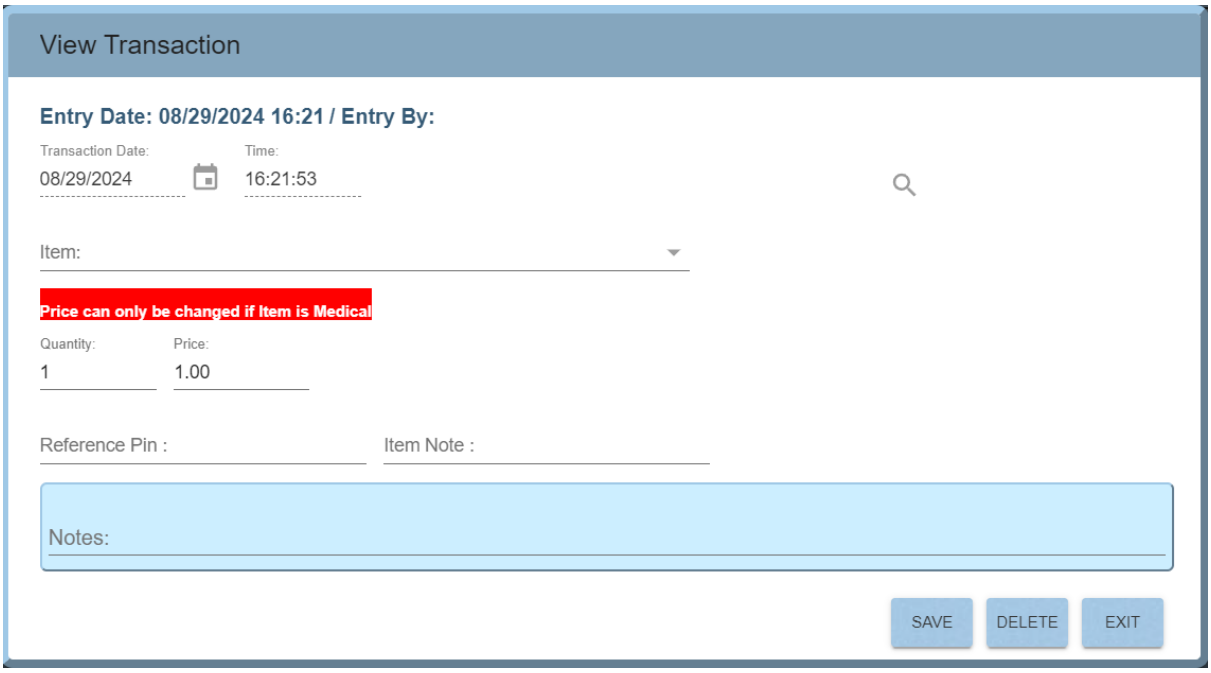
Unlike the other modules, when placing a new commissary order, you should skip straight down to the tabs. The **Order Detail** tab will be open automatically. Scroll down to it and click on **Add Transaction.**



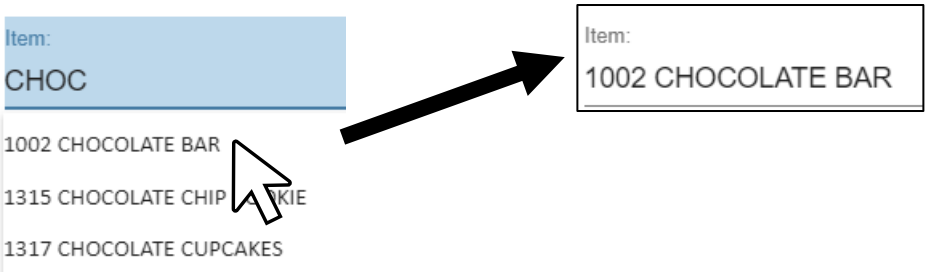
iSOMS will ask if you want to add a new item. Click **Yes.**



This will bring up a window where you can add which item the inmate is going to purchase.



First, type the name of the item the inmate is purchasing into the **Item** field. You can click on the correct option when it appears.



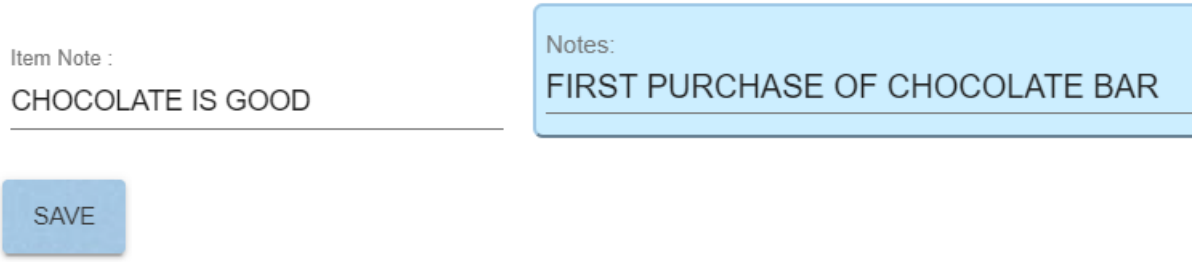
Now add how many of the item the inmate will purchase in **Quantity.** The price can only be changed here at the purchase screen if the item is flagged as Medical; otherwise, to change the price, you will have to go back to the *Commissary Items* module and change it there.



If you need to add a reference number, put it in the **Reference Pin** field.

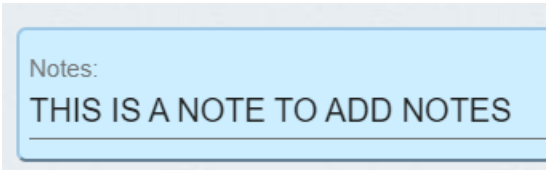


Now add any relevant notes in the **Notes** field. If you need to add a special note about this item, put it in the **Item Note** field. Click **Save** at the bottom of the window.

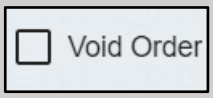


Now you can repeat the above process, adding as many different items as the inmate is going to purchase (or has purchased). When you are finished, do the following:

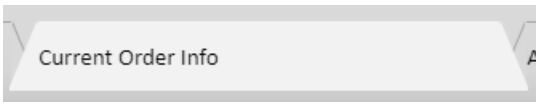
Add any notes relevant to the whole order on the main screen in the middle of the fields.



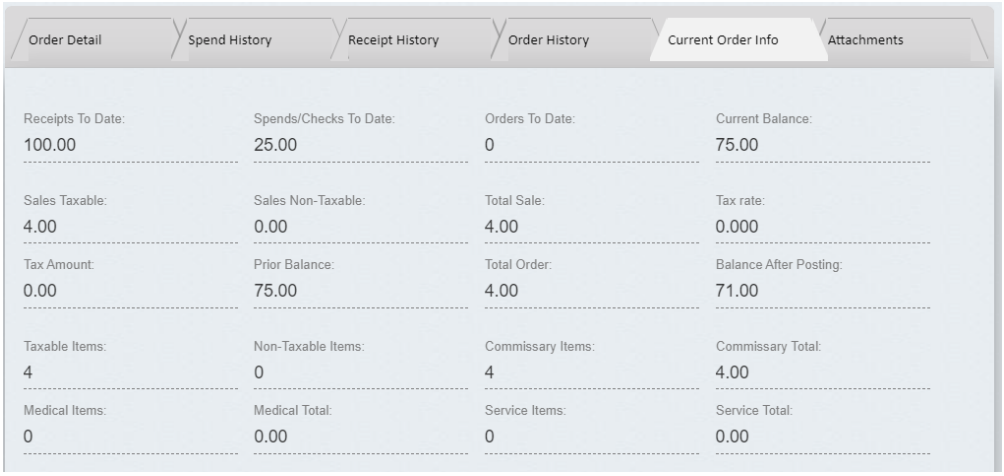
TIP: If you need to void this order later, check **Void Order** in the main field area. This will keep the order in iSOMS, but it will void the money spent.



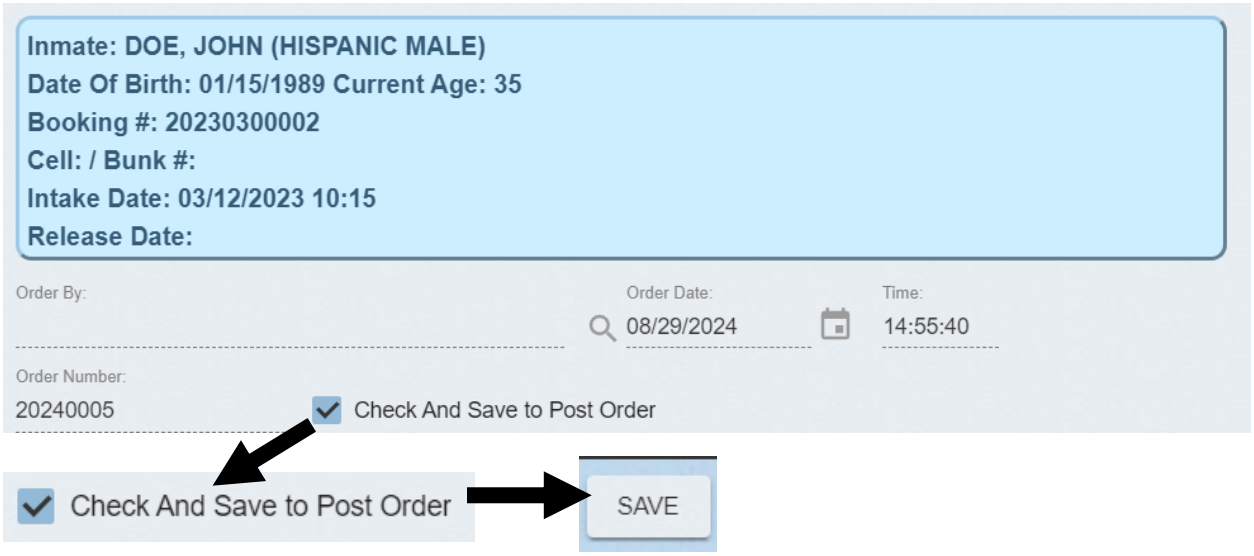
Check the **Current Order Info** tab to ensure that everything looks right.



In this tab, you can view the inmate's current balance, the cost of the current order, and the result if this order is posted to iSOMS. Only *Medical* items can allow you to spend into a negative balance, so make sure the balance is not negative afterwards.



IMPORTANT: The final step is to click **Check and Save to Post Order** near the fields at the top of the screen on the right. This is **required** to have the balance update in iSOMS. Don't forget to check this box and then click **Save.**

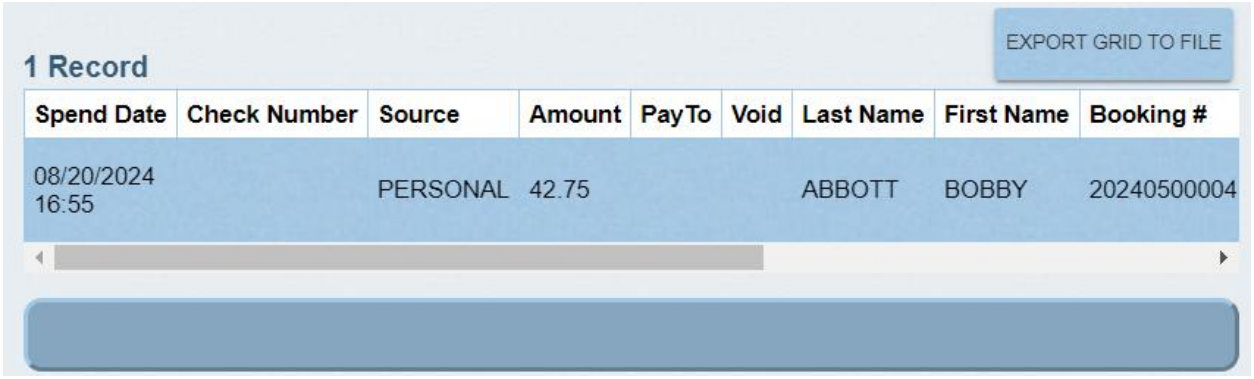


Other Point of Sale Tabs

The other tabs for the *Point of Sale* module are not required for filling out an order record. Four tabs (*Spend History, Receipt History, Order History,* and *Current Order Info*) are read-only, so only **Order Detail** and **Attachments** allow you to actually add information. Attachments are not required but can be used to reference information or to store check images.

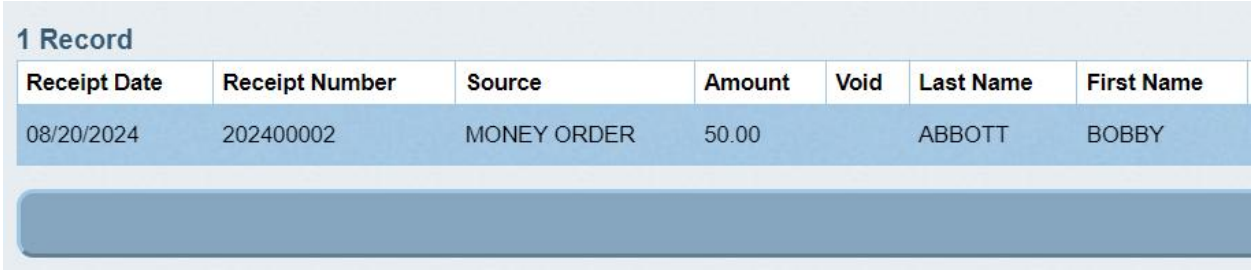


The **Spend History** tab lists the details of all previous and current spending orders for other reasons that are ***not*** the commissary, such as checks when the inmate is released. This lets you quickly view details of money paid out spent. **This tab is read only.** If you double-click on an entry from the table, it will open the individual (non-commissary) spending record in a new tab.



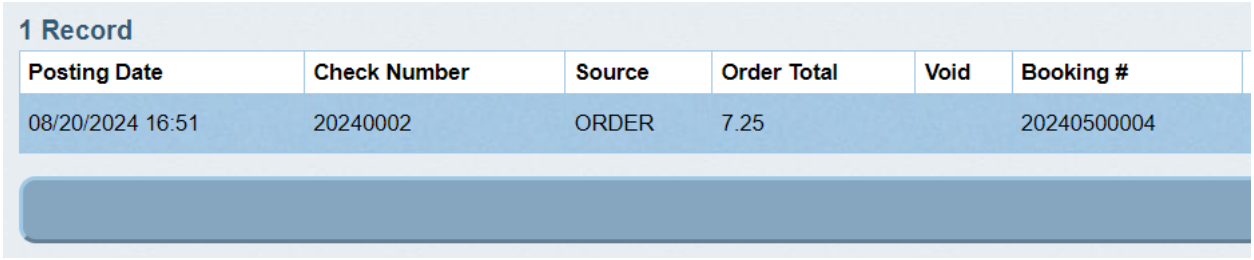


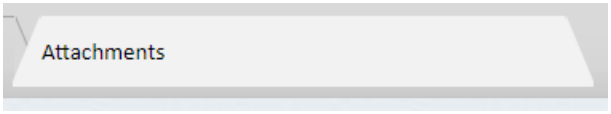
The **Receipt History** tab lists the details of all previous and current receipts. This lets you quickly view details of previous money received. **This tab is read only.** If you double-click on an entry from the table, it will open the receipt record in a new tab.





The **Order History** tab lists the details of all previous and current commissary spending. This lets you quickly view details of previous orders. **This tab is read only.** If you double-click on an entry from the table, it will open the record in a new tab.





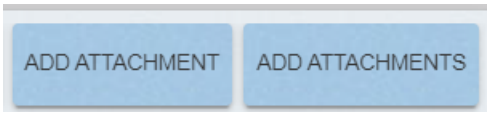
The **Attachments** tab lets you add and remove attachments related to this spend/check record, such as the check or money transfer for the inmate's spending of the money.

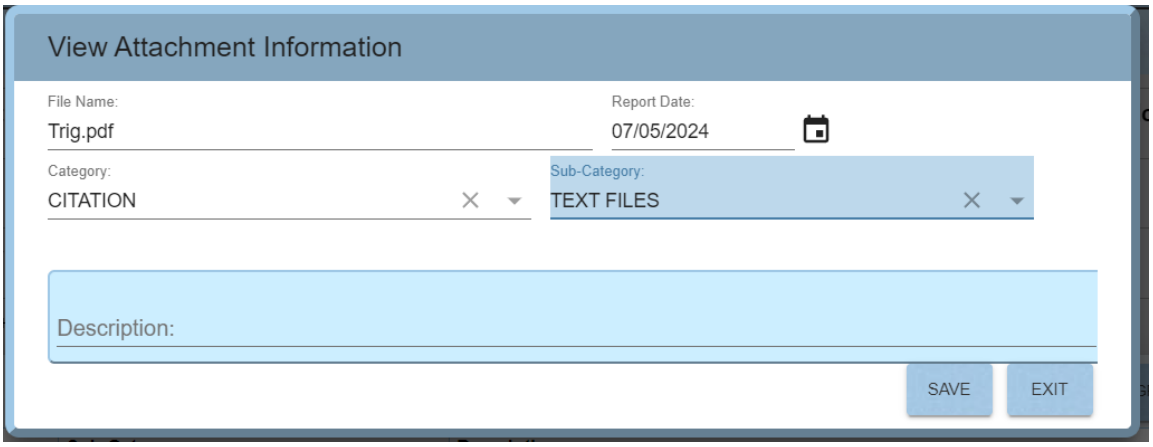
Double-click a file entry to view the record for the attachment or click on the icon to download the attachment to the computer.



You can add a single attachment at a time or multiple attachments at a time. Just like above with images, you will need the System Tray Installer downloaded to the computer you are using to add multiple attachments at once.

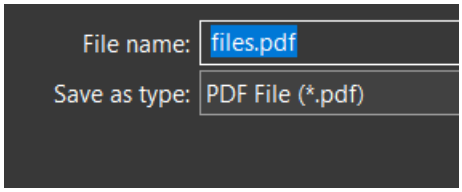
Click **Add Attachment** to add a single attachment or click **Add Attachments** to add multiple attachments at the same time. Choose the attachments from the computer, then add the appropriate category and sub-category for the file.



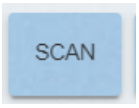


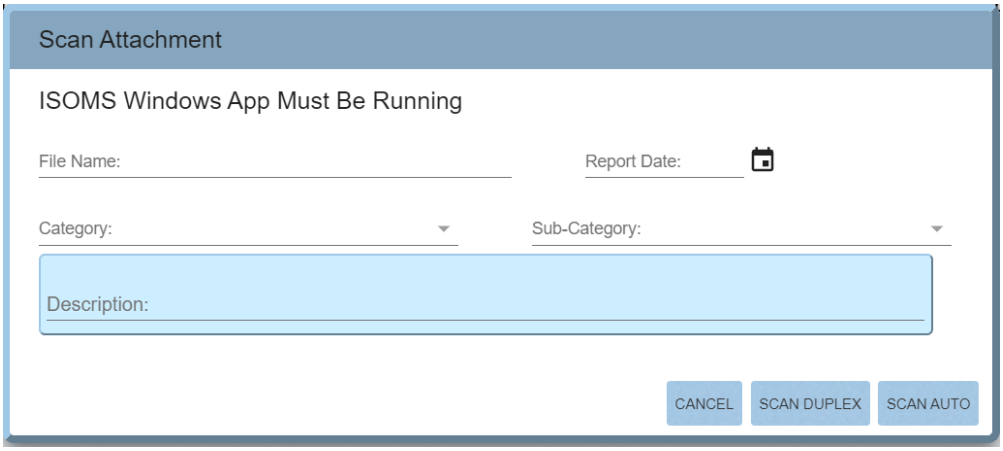
You can also **Download All PDFs** at once by clicking the appropriate button.





If you have the iSOMS Windows App, you can use **Scan** to scan files into the attachments.



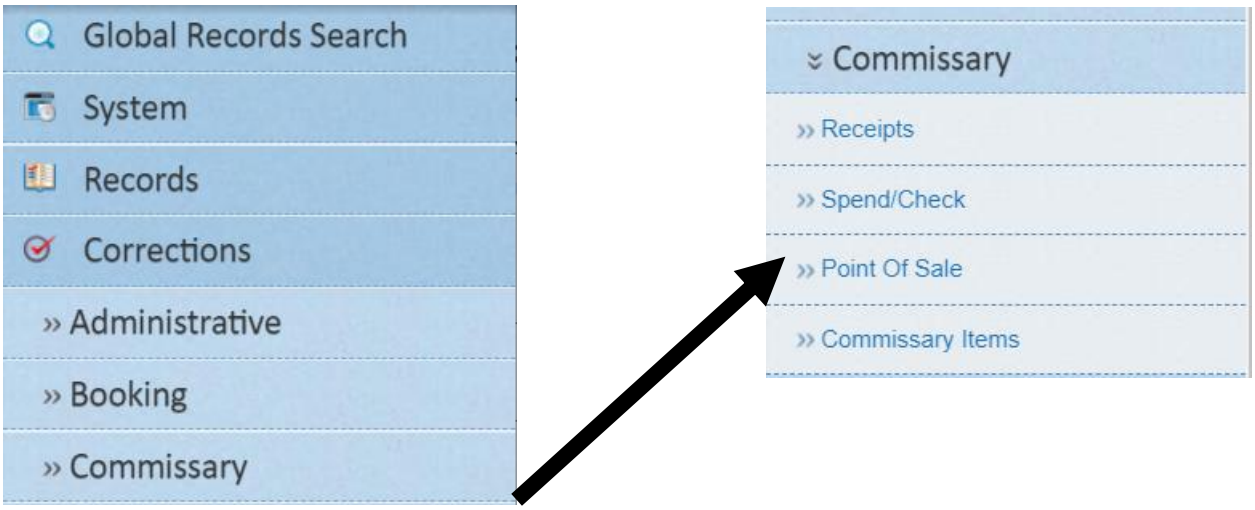


Point of Sale Reports

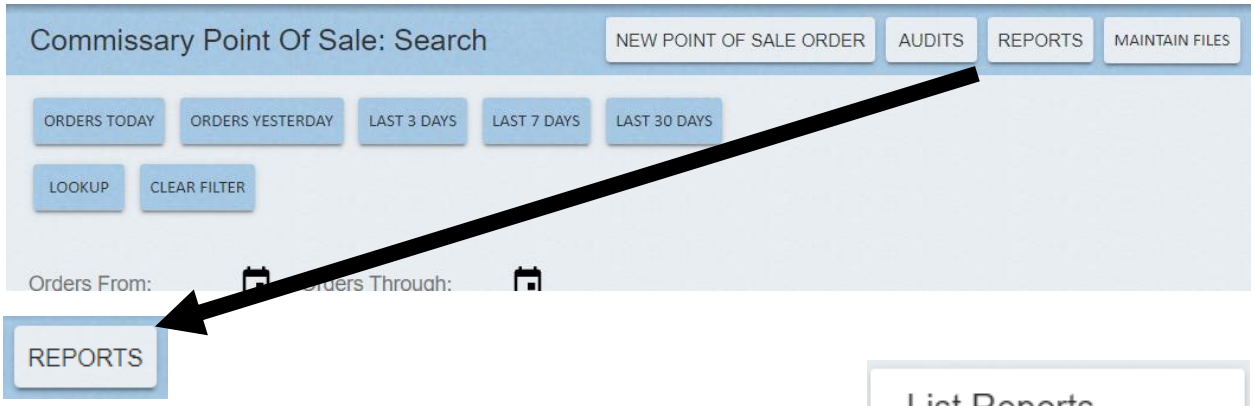
iSOMS has the capability to allow you to print several different types of reports for commissary orders.

To access the reports, begin on the iSOMS home screen. Click on the following:

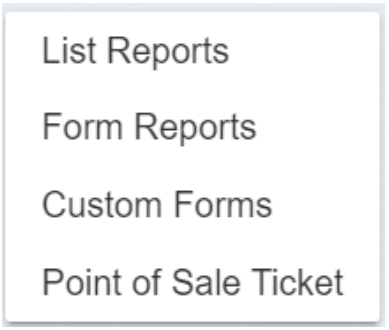
Corrections → Commissary → Point of Sale



Now click on the **Reports** button in the upper right corner.

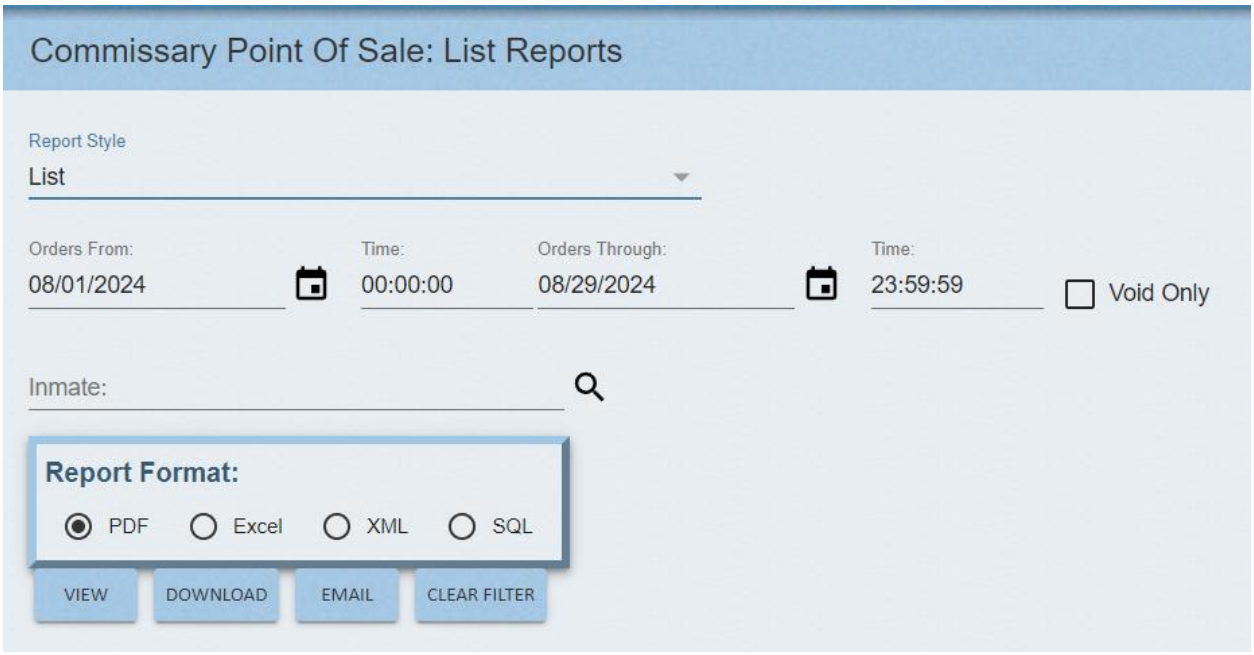


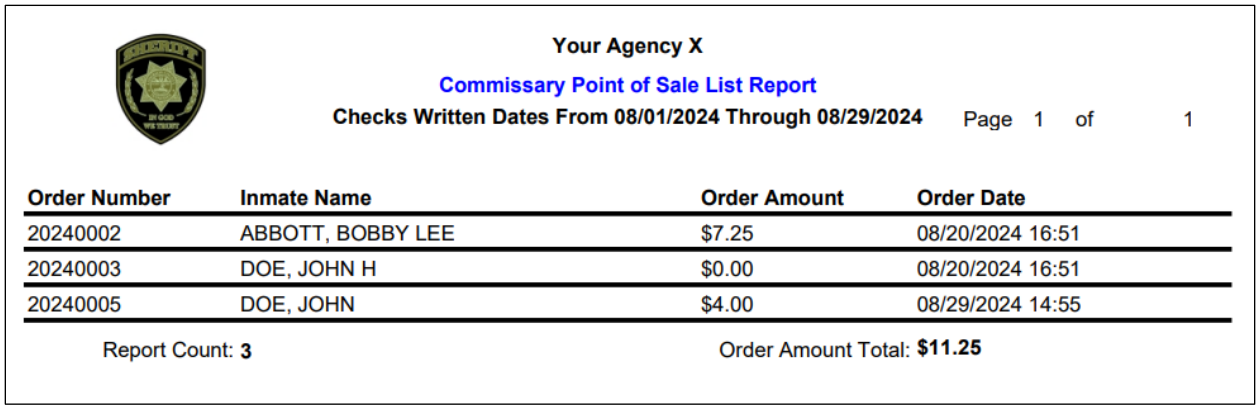
You can then choose from a few different options. List Reports and Point of Sale Ticket reports are explained below.



List Reports

This report quickly displays order records in your iSOMS system so you can see an overview of commissary orders for a certain date range. Add the start and end date in **Orders from** and **Orders through,** choose a specific **Inmate** *if* you want to restrict report to a single person, and click **View** or **Download** to view the report.





Your Agency X

Commissary Point of Sale List Report

Checks Written Dates From 08/01/2024 Through 08/29/2024 Page 1 of 1

Order Number	Inmate Name	Order Amount	Order Date
20240002	ABBOTT, BOBBY LEE	$7.25	08/20/2024 16:51
20240003	DOE, JOHN H	$0.00	08/20/2024 16:51
20240005	DOE, JOHN	$4.00	08/29/2024 14:55

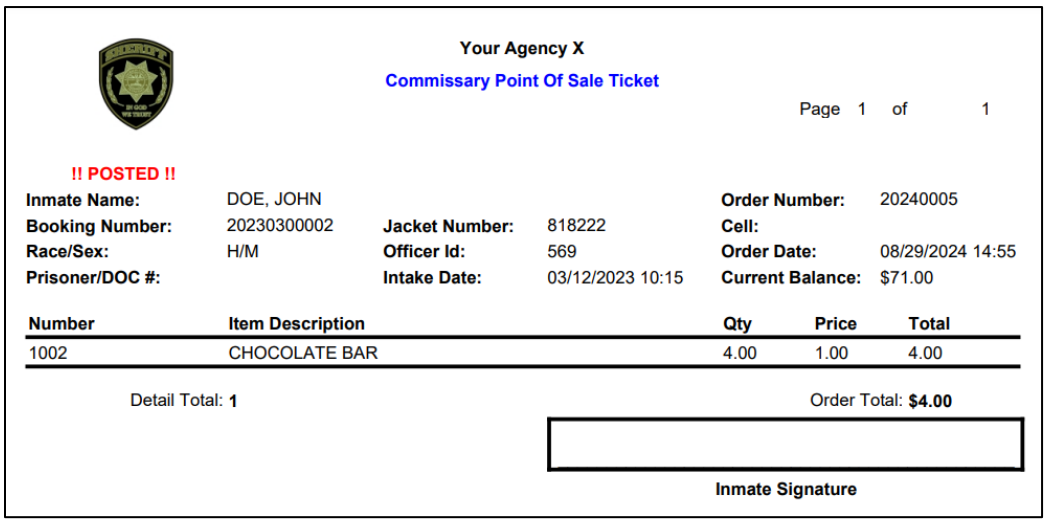
Report Count: **3** Order Amount Total: **$11.25**

Point of Sale Ticket

This report lets you print a paper receipt (like a records receipt) so you can give it to the inmate or other relevant parties. First, find the order you want to create a receipt for, and then click **Reports → Point of Sale Ticket.** Now click **View** or **Download** to view the report.







Your Agency X

Commissary Point Of Sale Ticket

Page 1 of 1

!! POSTED !!

Inmate Name:	DOE, JOHN			**Order Number:**	20240005
Booking Number:	20230300002	**Jacket Number:**	818222	**Cell:**	
Race/Sex:	H/M	**Officer Id:**	569	**Order Date:**	08/29/2024 14:55
Prisoner/DOC #:		**Intake Date:**	03/12/2023 10:15	**Current Balance:**	$71.00

Number	Item Description	Qty	Price	Total
1002	CHOCOLATE BAR	4.00	1.00	4.00

Detail Total: **1**

Order Total: **$4.00**

Inmate Signature

Quick Reference for Commissary

How do I add new commissary items?

Use the **Commissary Items** module: see *Adding New Commissary Items* starting on page 615.

How do I add money to an inmate's account?

To add money, use a money receipt record in the **Receipts** module: see *Adding New Money Receipts* starting on page 637.

How do I record an order for commissary items by an inmate?

Use the **Point of Sale** module and add a new order: see *Adding New Point of Sale Records* starting on 663.

How do I record a payout to an inmate when released?

Use the **Spend/Check** module and add a new spend/check: see *Adding New Spending / Check Records* starting on page 649.

How do I print a receipt for a commissary order?

Use the **Point of Sale Ticket** report: see *Point of Sale Ticket* on page 673.

How do I print a receipt for money received by an inmate?

Use the **Detail Report**: see *Detail Report* on page 646.

How is the balance of an inmate calculated?

Receipts minus (Orders *and* Spend)

*Example: The inmate previously received $100, which was recorded in the **Receipts** module. Now the inmate is spending $25 on a non-commissary purchase in **Spend/Check**. The inmate spent $4 on a commissary order under **Point of Sale**. The inmate's new balance is $71. (100 – 29 = 71)*

Receipts To Date:	Spends/Checks To Date:	Orders To Date:	Current Balance:
100.00	25.00	4.00	71.00

Visitation Overview

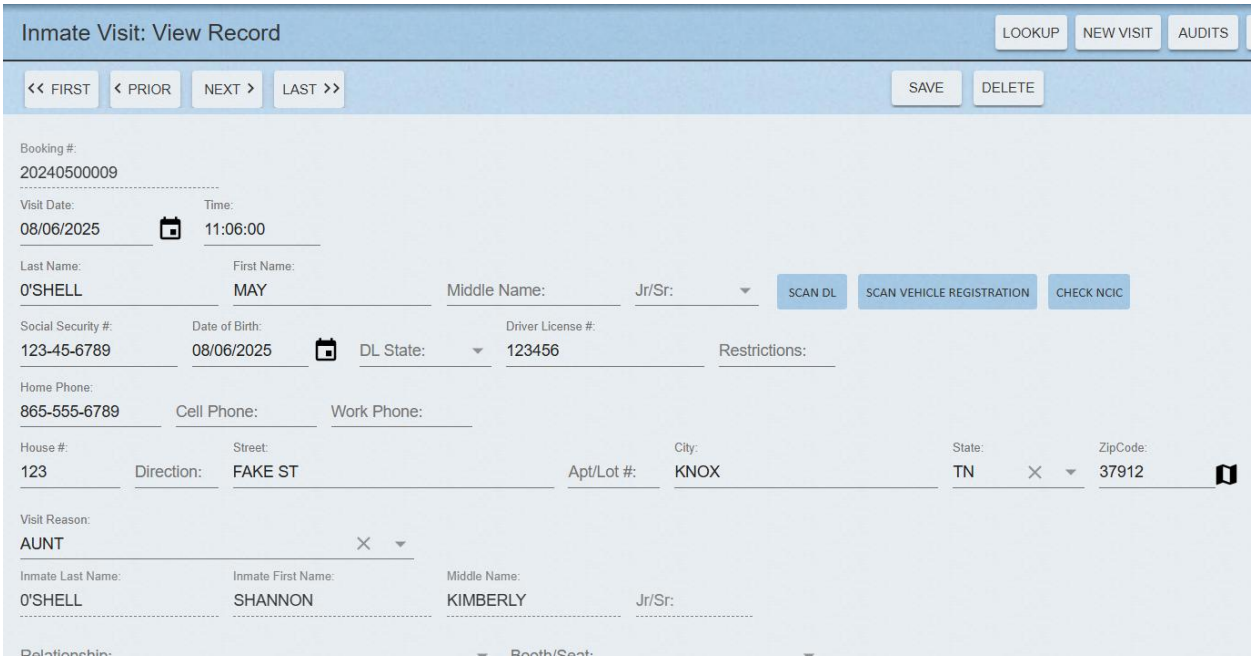
The only current module under the *Visitation* heading is the *Visitor Log Entry.* iSOMS already allows you to track visitors in the *Intake / Booking Records*. However, this module allows you to search visitors entered there in a standalone module. It syncs with records from the **Visit History** tab in Booking (pg. 136) and allows you to search visitor history, view previous or upcoming visitors, create new visitor records for any inmate, and run reports on visitor records.

Note: These records are only from the **Visit History** Booking tab, **NOT** the **Visitors** Booking tab.

Visitor Log Entry

The **Visitor Log Entry** module takes all the visitor history reports created in their tab under **Intake** / **Booking Records** and compiles them so you can see the visitors of all inmates or search for a specific inmate's visitors. You can also run reports on these records to get a list or statistics of the records.

Note: These records are only from the **Visit History** Booking tab, **NOT** the **Visitors** Booking tab. Those are completely separate entries and the two tabs are not linked except that they are both available in Booking.



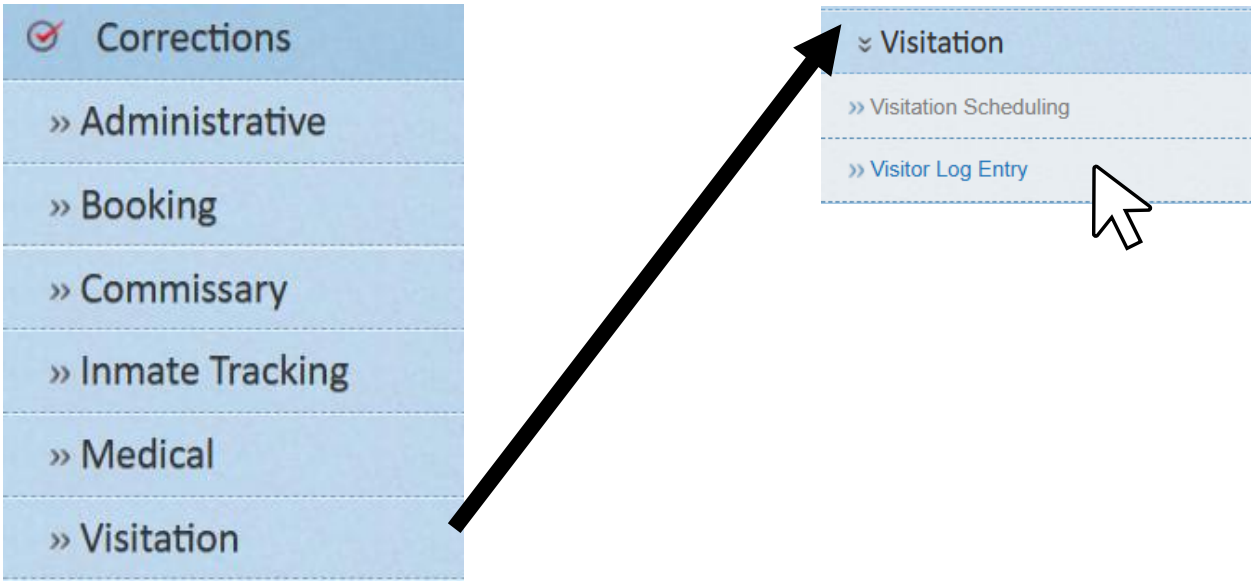
The first part of this section explains searches. If you need explanations on an already existing record, see the *Filling Out a Visit Record* to get more information on the different fields and tabs available.

Searching for Existing Visit Records

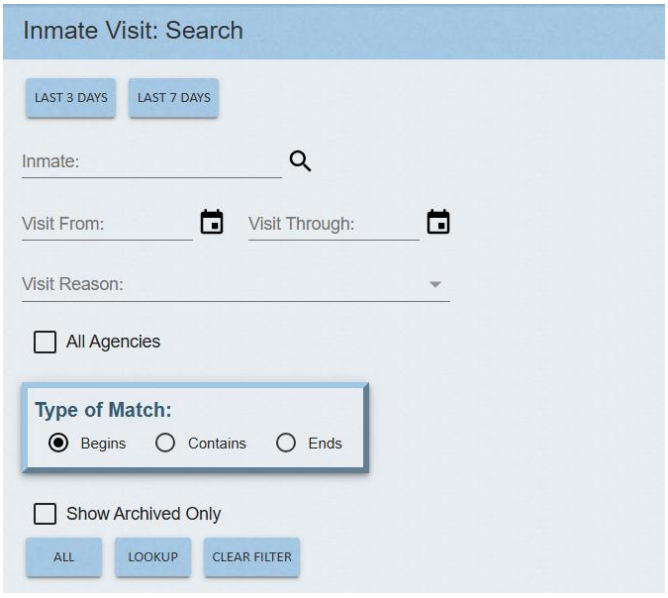
To search existing visit records, begin on the iSOMS home screen.

Navigate to:

Corrections → Visitation → Visitor Log Entry



This will open the **Inmate Visit: Search** screen. Here you can search and filter for different visit records. You can either use the blue buttons to do *quick searches* or enter information in the fields to do *standard searches.*



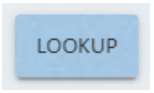
Quick Searches

A few different quick searches are available by using the blue buttons.



Last 3 Days and **Last 7 Days** will show you all the records in the specified recent time periods.

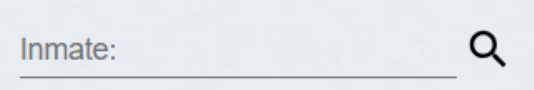
Standard Searches



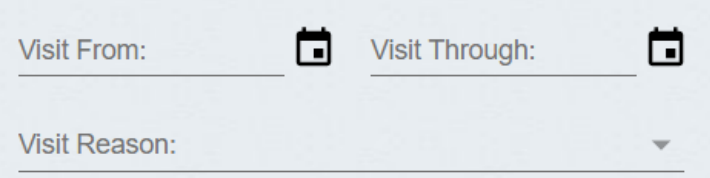


Various fields are available if you need to do a search that the quick searches won't work for. Fill in the fields to narrow the search and click **Lookup** at the top or bottom of the page to perform the search. If you need to start over, simply click **Clear Filter** to remove all search field entries.

Field Explanations

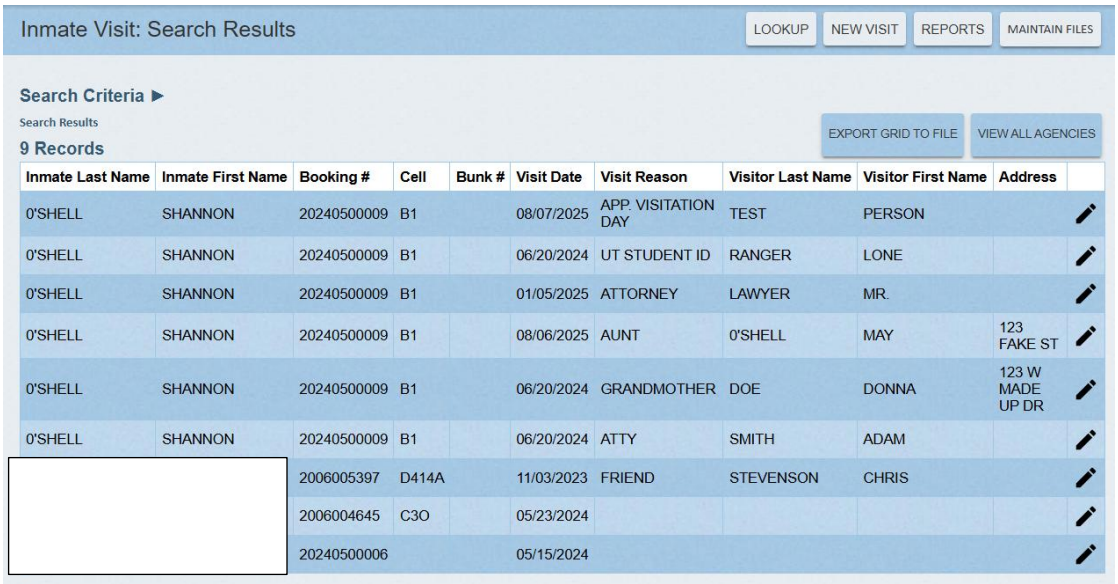


This field, **Inmate**, lets you search for a specific inmate's records. Just type their name and a search box will open, or click the magnifying glass and you can find an inmate to search for just their visit records.



Use these fields to narrow the search by date range or a specific visit reason. Use **Visit From** and **Visit Through** to search between the dates selected. Use **Visit Reason** to search categories of visit records.

As mentioned above, when you have finished with your search parameters, click **Lookup** to perform your search. Double click on the desired entry to view, edit, or delete the record.

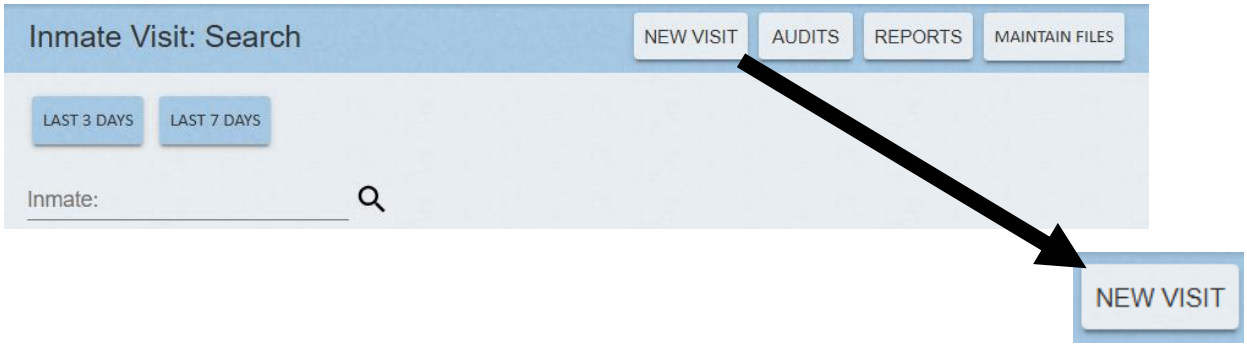


Inmate Last Name	Inmate First Name	Booking #	Cell	Bunk #	Visit Date	Visit Reason	Visitor Last Name	Visitor First Name	Address	
0'SHELL	SHANNON	20240500009	B1		08/07/2025	APP. VISITATION DAY	TEST	PERSON		
0'SHELL	SHANNON	20240500009	B1		06/20/2024	UT STUDENT ID	RANGER	LONE		
0'SHELL	SHANNON	20240500009	B1		01/05/2025	ATTORNEY	LAWYER	MR.		
0'SHELL	SHANNON	20240500009	B1		08/06/2025	AUNT	0'SHELL	MAY	123 FAKE ST	
0'SHELL	SHANNON	20240500009	B1		06/20/2024	GRANDMOTHER	DOE	DONNA	123 W MADE UP DR	
0'SHELL	SHANNON	20240500009	B1		06/20/2024	ATTY	SMITH	ADAM		
		2006005397	D414A		11/03/2023	FRIEND	STEVENSON	CHRIS		
		2006004645	C3O		05/23/2024					
		20240500006			05/15/2024					

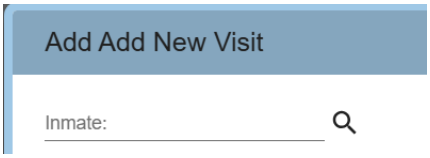
Creating a Visit Record

Typically, visit records can be created on an inmate's booking record under the **Visit History** tab. See page 141 for more information on how to add visit records under that tab.

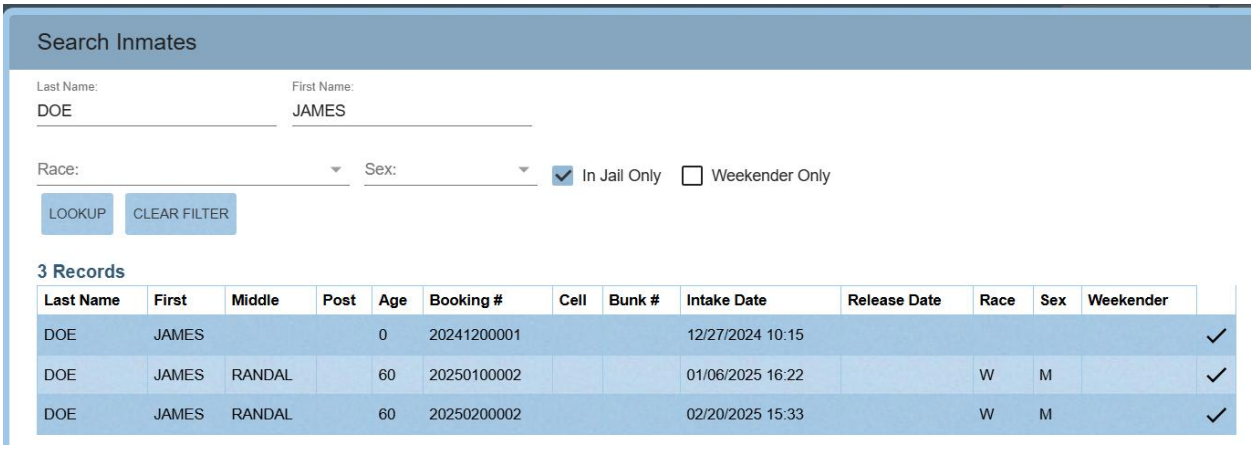
The **Visitor Log** module also allows you to create records here. Navigate to the search screen and click **New Visit** in the upper right.



This will open a search box. Type the name of the inmate and a search box will open, or click the magnifying glass and you can find an inmate to add an visit record for.



Add name or other search parameters and click **Lookup.** Click the checkmark symbol (✓) to select the inmate for the visit record. Then click **ADD** to create a new record.

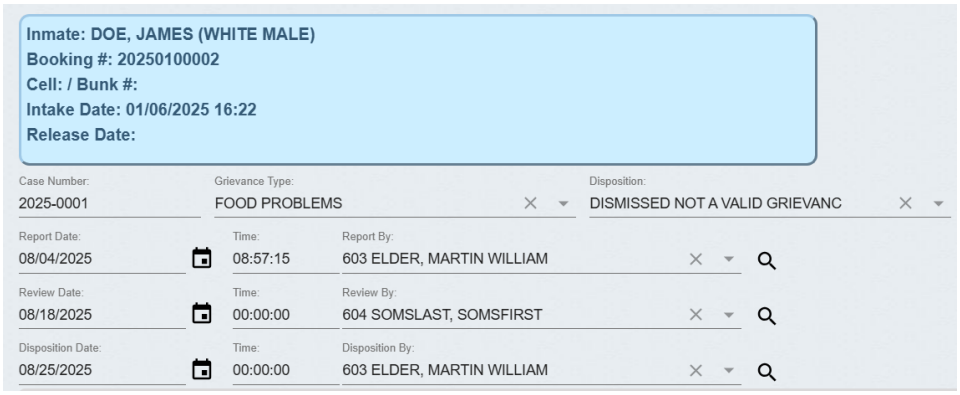


Last Name	First	Middle	Post	Age	Booking #	Cell	Bunk #	Intake Date	Release Date	Race	Sex	Weekender	
DOE	JAMES			0	20241200001			12/27/2024 10:15					✓
DOE	JAMES	RANDAL		60	20250100002			01/06/2025 16:22		W	M		✓
DOE	JAMES	RANDAL		60	20250200002			02/20/2025 15:33		W	M		✓

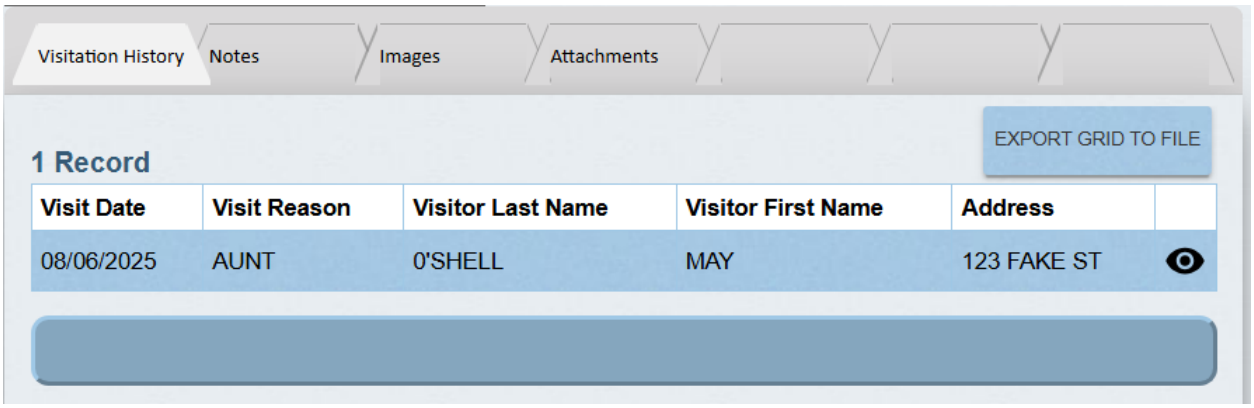


There are two primary sections of the report:

1. The *fields* in the upper part of the screen. These record details about the visitor, visit reason, and the inmate.



2. The *tabs* record visitation history, and any extra notes, images, or attachments for this record.



All of the tabs are optional. **Visitation History** is a read-only tab. If extra **Notes**, **Images**, and/or **Attachments** are needed, you can add them in the respective tab. This process is covered in detail in the next section, *Filling Out a Visit Record.*

After you enter new details, make sure to click **Save** at the top of the screen.



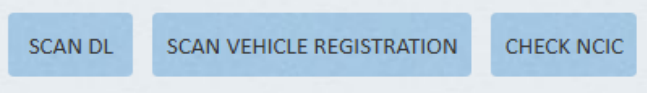
Filling Out an Visit Record – Fields

This section explains in detail the different fields and tabs for a Visit Record. The top section of the report with fields should always be filled out when relevant information is available, and the tabs should only be filled out as needed.

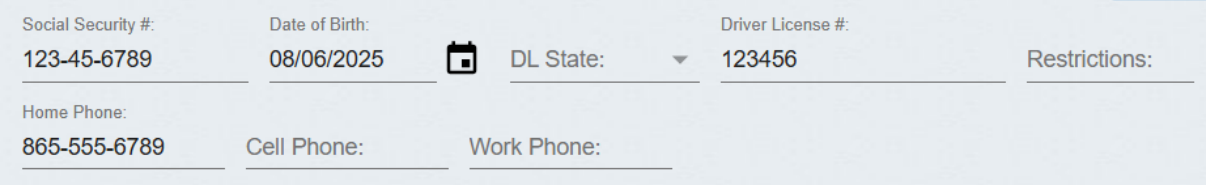
Fields



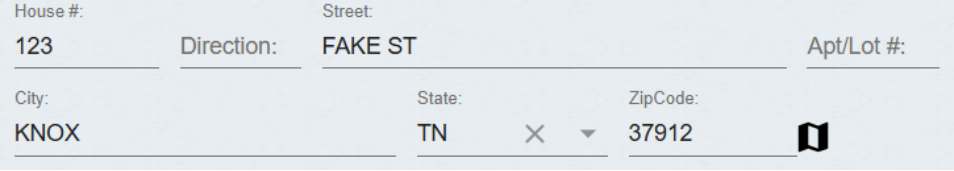
The **Visit Date and Time** will automatically be set to the current datetime, but you can change it if you'd like. Then add the name information of the visitor.



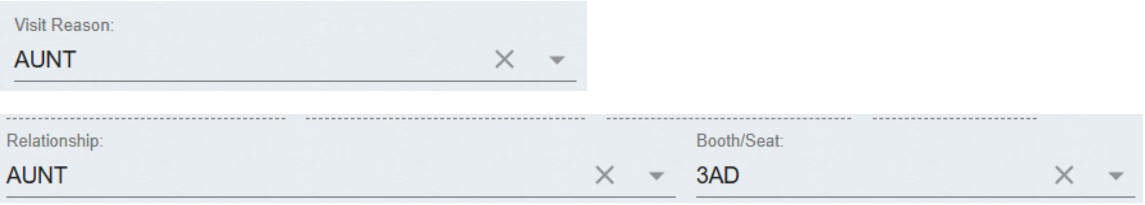
Use these buttons if you need to scan documents or check NCIC for this person.



Add identification and contact information for the visitor.



Add address information for the visitor.

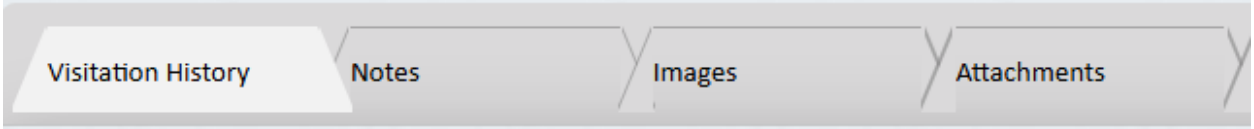


These last fields relate the visitor and the inmate. Add the **Visit Reason**, the **Relationship**, and the **Booth / Seat** where the visit will take place.

Filling Out an Visit Record – Tabs

Summary

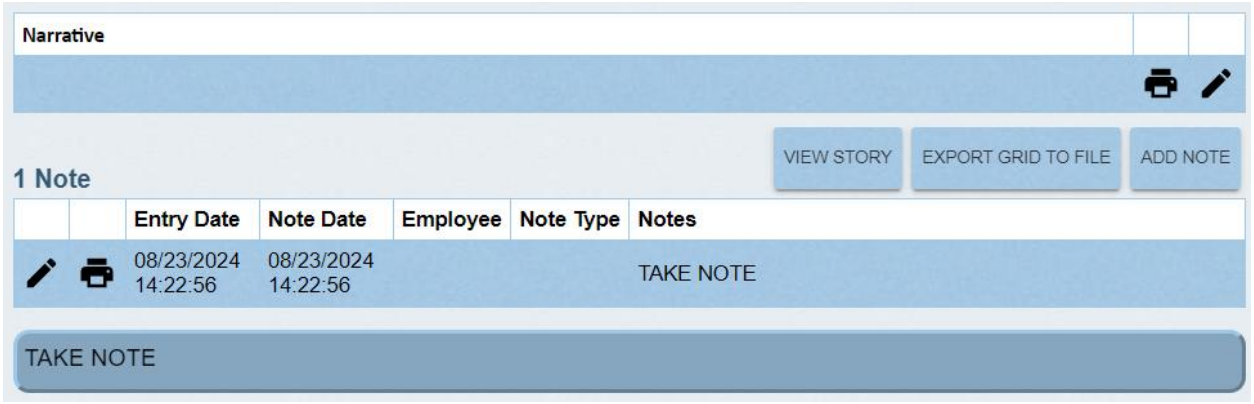
Notes, **Images**, and **Attachments** tabs are available if you need to take additional notes or upload images and documents.



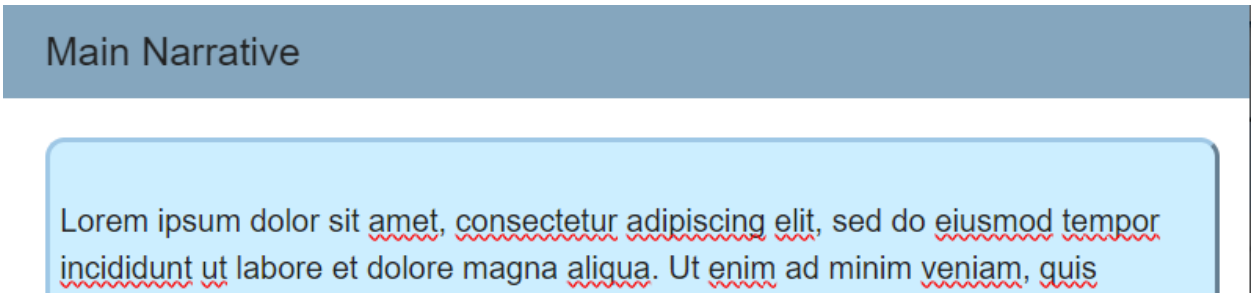
Notes Tab



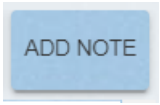
The **Notes** tab is used to view or add notes pertinent to the record. Double-click on any entry in the table to edit or view it.

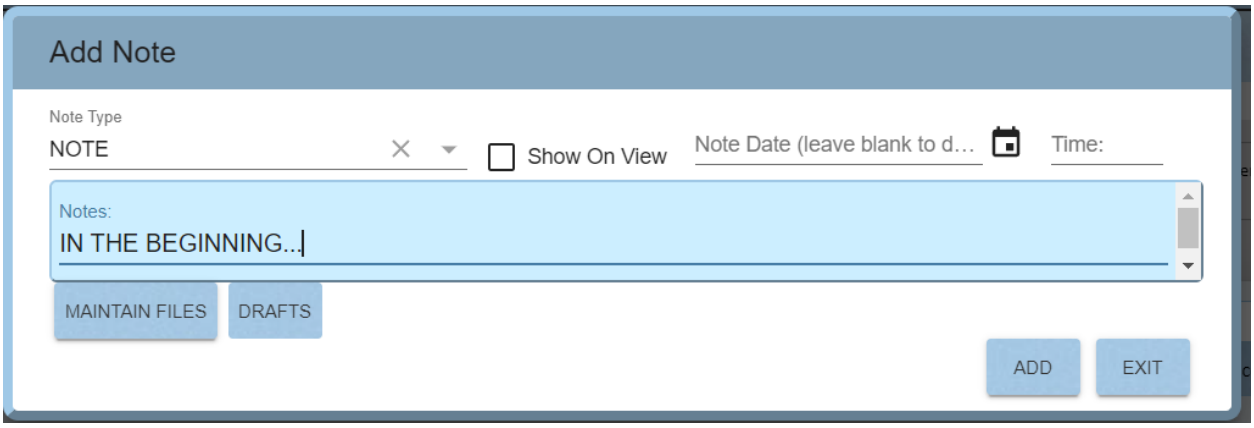


Narrative acts as an area where you can add a long note. This is useful when you want to add important or long form notes that won't be mixed in with the rest of the short notes.



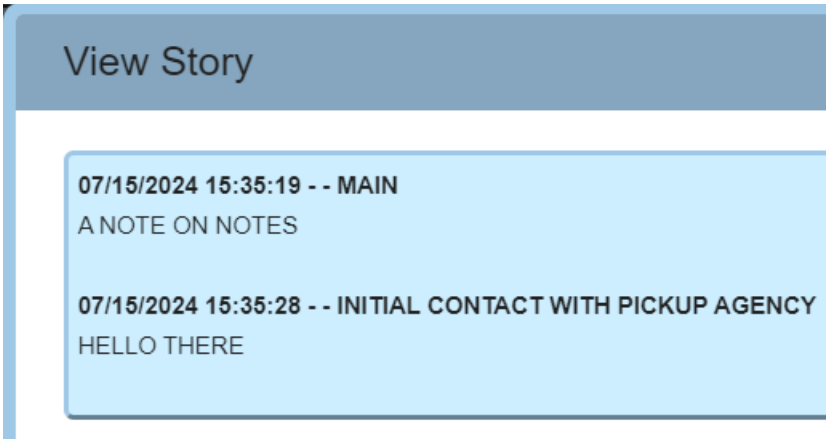
Use **Add Note** to add a new note.





The **View Story** button will show all notes (except Narrative) that have been added on one page.





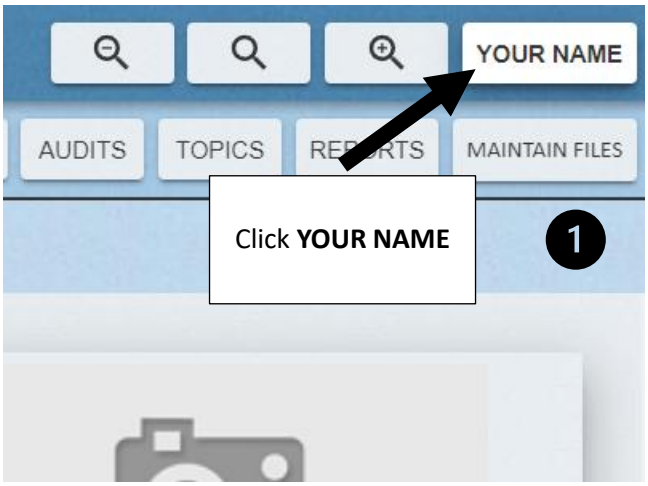
Images Tab

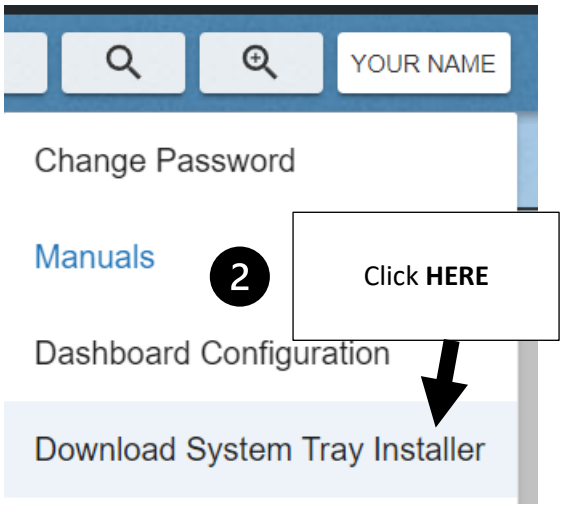


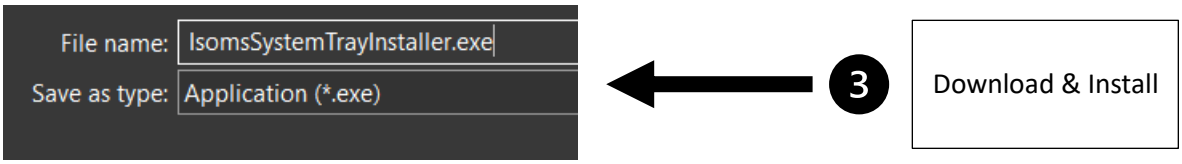
The **Images** tab is used to view, download, or add images. You can add a single image at a time or multiple images at a time. Click **Add Image** to add a single image.



To add multiple images at a time, you will need the System Tray Installer downloaded to the computer you are using. The System Tray Installer can be found on the iSOMS home page by clicking on the button in the upper right with your username. Once you click on that, you will get a drop-down list, and **Download System Tray Installer** is one of the options. Download and install it on this computer.

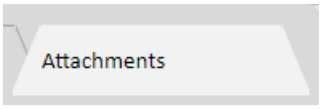






After you have the System Tray Installer on the computer, you can now use the **Add Images** button to upload multiple images at once if necessary.

Attachments Tab

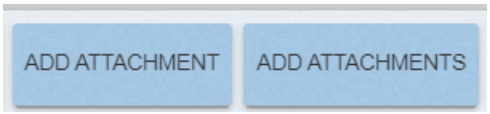


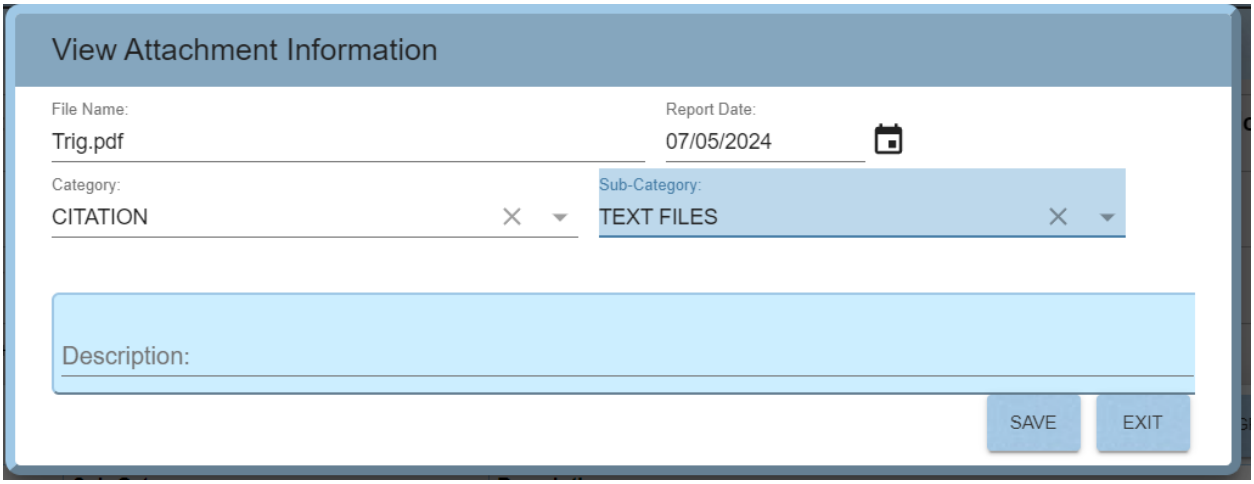
The **Attachments** tab is used to view, download, or add attachments. Double-click a file entry to view the record for the attachment or click on the icon to download the attachment to the computer.



You can add a single attachment at a time or multiple attachments at a time. Just like above with images, you will need the System Tray Installer downloaded to the computer you are using to add multiple attachments at once. See the *Image* tab instructions on the previous few pages for instructions on installing the System Tray Installer.

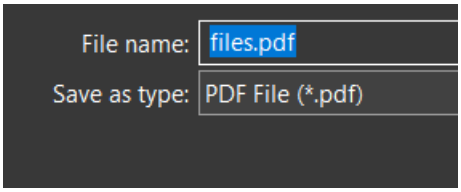
Click **Add Attachment** to add a single attachment or click **Add Attachments** to add multiple attachments at the same time. Choose the attachments from the computer, then add the appropriate category and sub-category for the file.



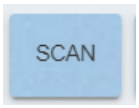


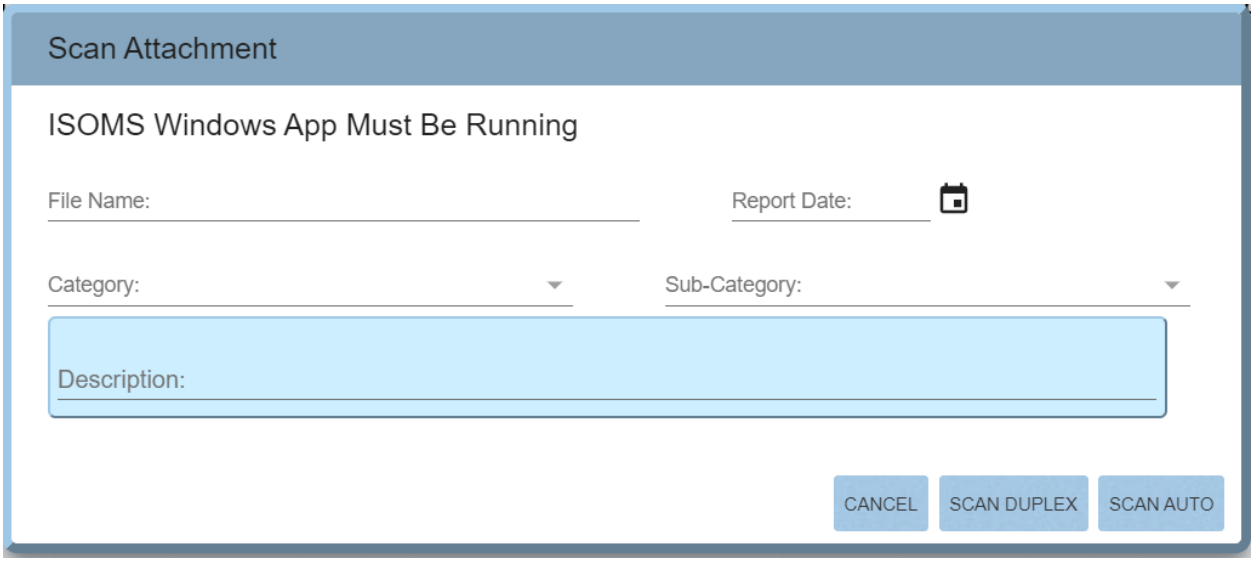
You can also **Download All PDFs** at once by clicking the appropriate button.





If you have the iSOMS Windows App, you can use **Scan** to scan files into the attachments.

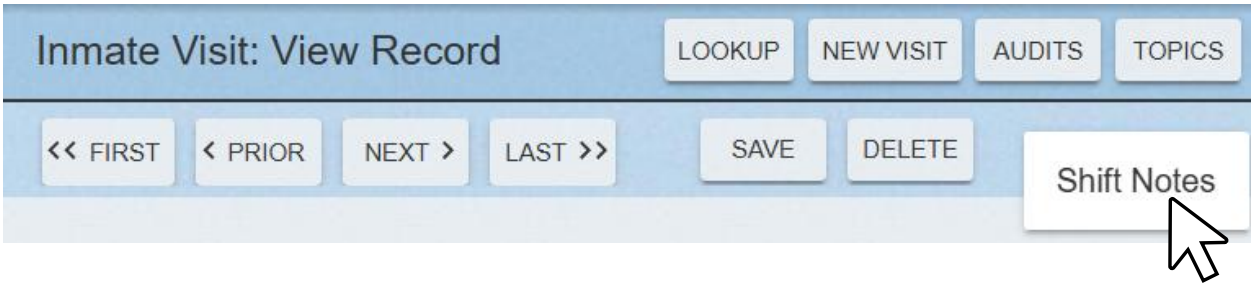




Visit Record Topics

The **Topics** button lets you do special actions in different modules. In **Visit Records**, if you use the **Topics** button, you will be able to quickly open the **Shift Notes** module right from here.

Once you have opened the **Visit Records** module, you can click **TOPICS → SHIFT NOTES** in the upper right.



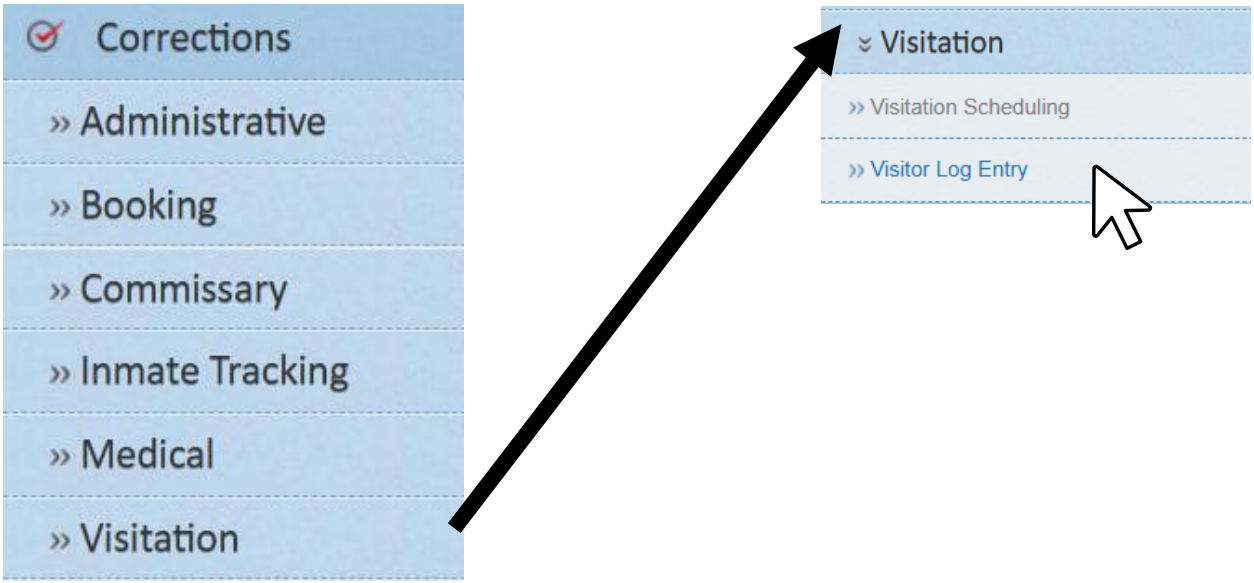
This will open the **Shift Notes** module. If you want more information on the **Shift Notes** module, please see *Shift Notes* on page 275.

Visit Record Reports

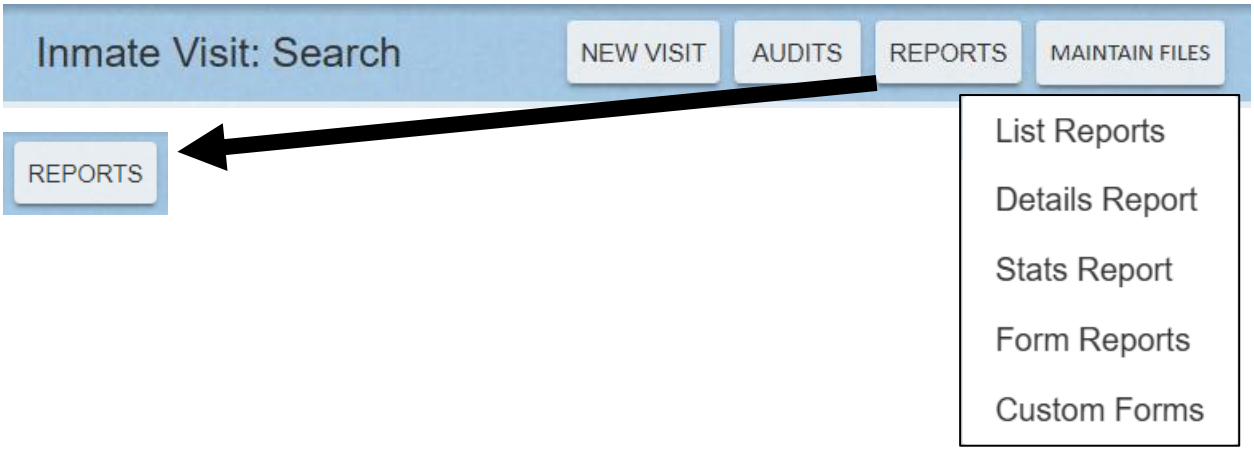
iSOMS has the capability to allow you to print different types of reports for Visit Records.

To access the reports, begin on the iSOMS home screen. Navigate to:

Corrections → Visitation → Visitor Log Entry

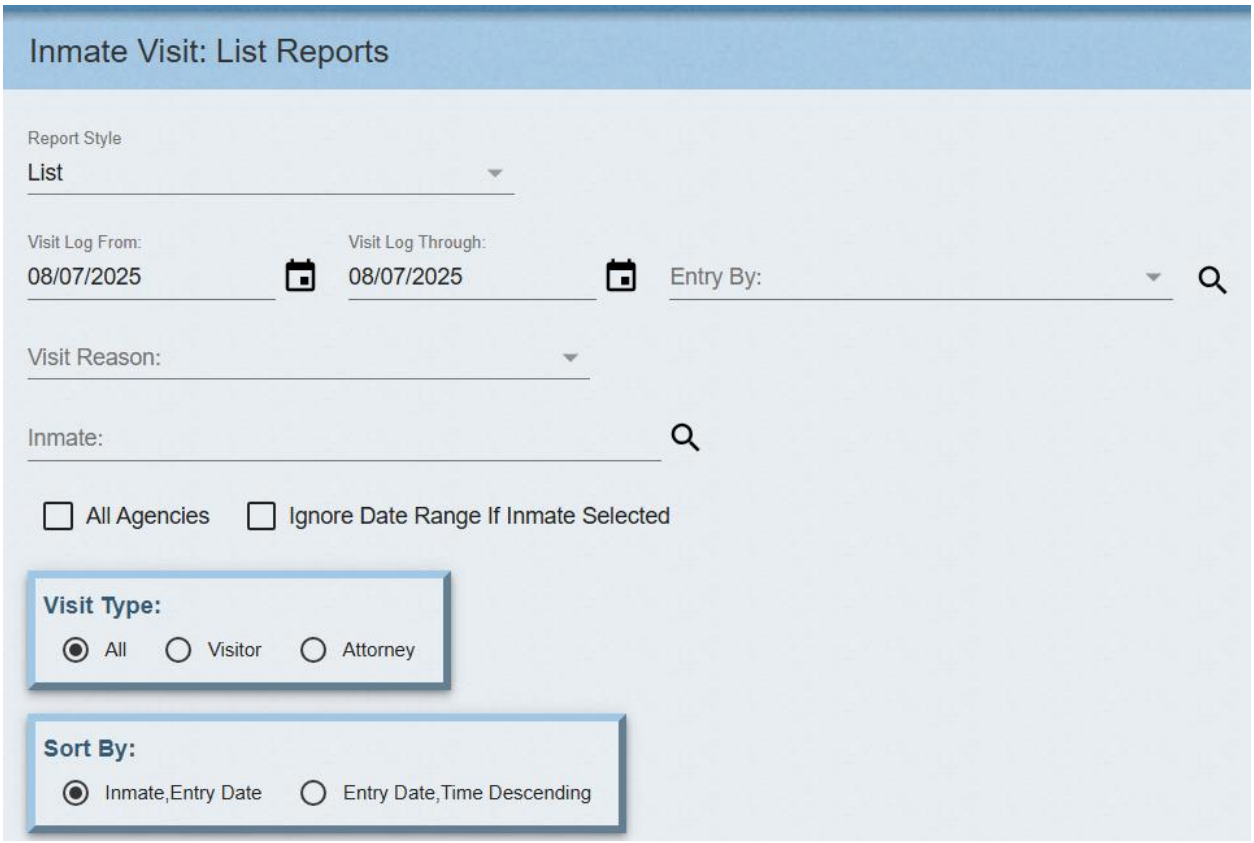


Now click on the **Reports** button in the upper right corner and select the report you wish to run. Different reports are explained over the next set of pages.

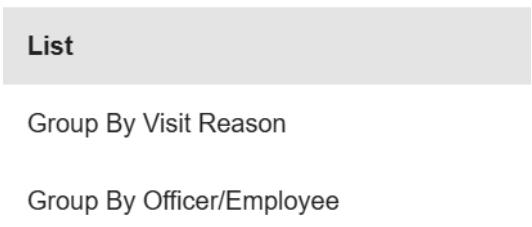


List Reports

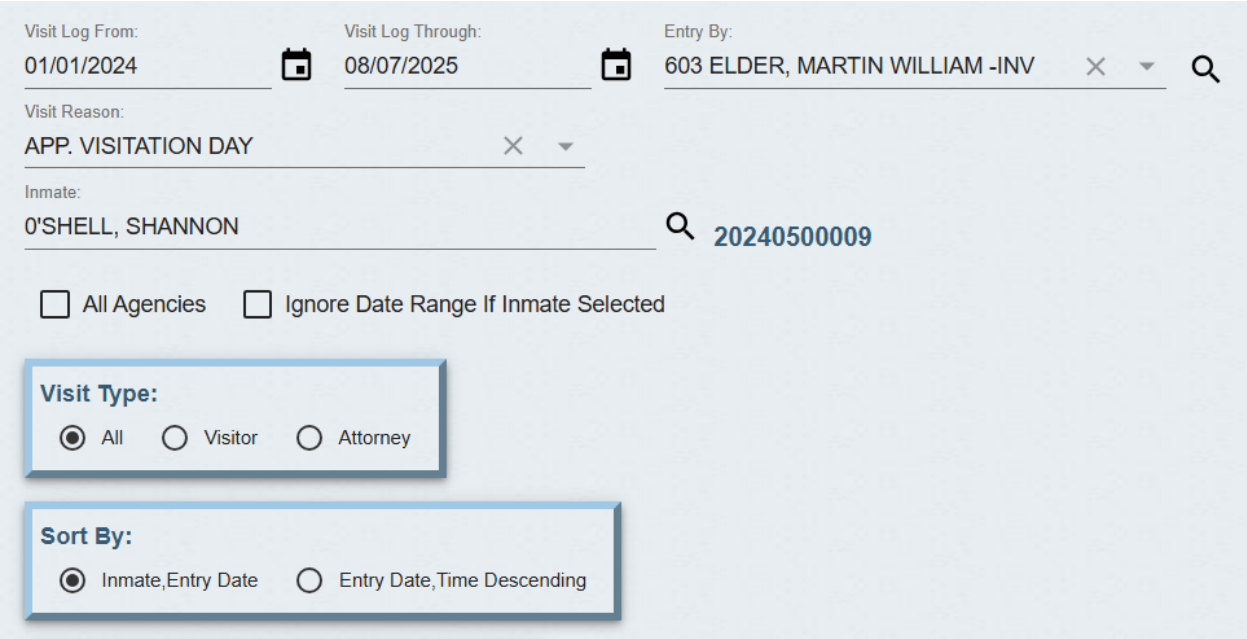
The **List Report** displays visit records in iSOMS over a certain date range. In this way you can see a list of records over your chosen time period. Add the start and end date in **Visit Log From** and **Visit Log Through.**



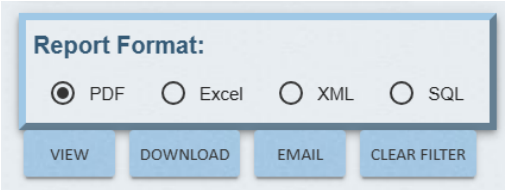
Report Style has some different layout and sorting options, such as *List, Group by Visit Reason, Group by Officer/Employee*. Pick the one most relevant to your desired result.



You can filter to one employee *entry by*, visit reason, or inmate, as well as ignore date range when searching for a specific inmate. There are also radio menus for sorting options.



Now, with your chosen parameters, click **View** or **Download** to view the report.



List Report

YOUR AGENCY

Inmate Visitation Log

Visit Dates From 01/01/2024 Through 08/07/2025

Page 1 of 1

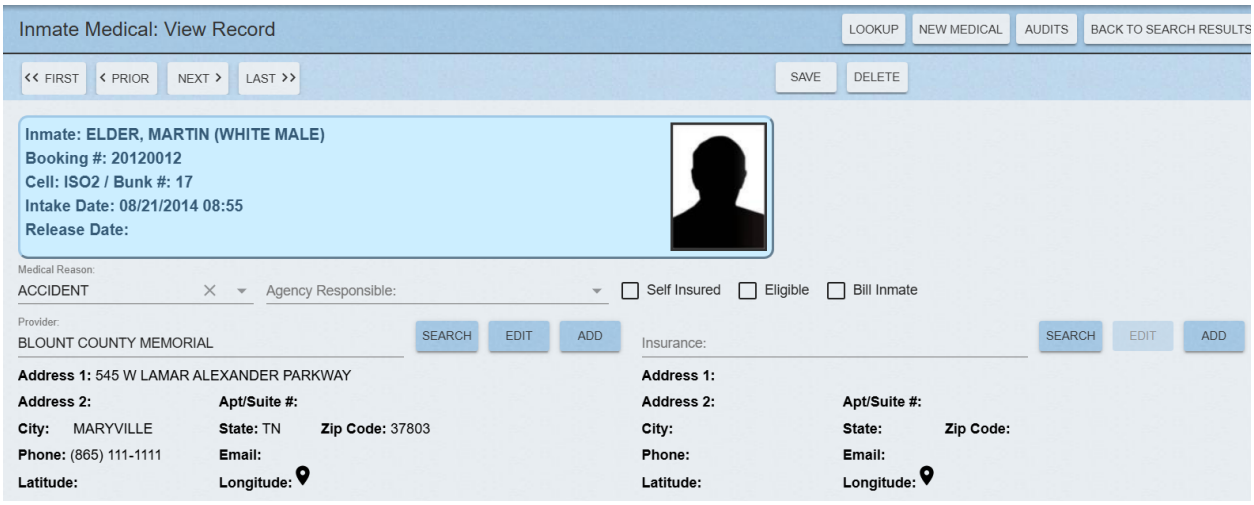
Inmate Name	Booking # Jacket #	Date/Time	Booth	Cell
0'SHELL, SHANNON KIMBERLY	202405000(0	01/05/2025 23:52		B6
Visitor Name: **LAWYER, MR.**		DL#:		
Visit Reason: **ATTORNEY**		SSN:		
Relationship:		Home Phone:		
0'SHELL, SHANNON KIMBERLY	202405000(0	06/20/2024 10:47		B6
Visitor Name: **RANGER, LONE**		DL#:		
Visit Reason: **UT STUDENT ID**		SSN:		
Relationship:		Home Phone:		

Medical Overview

The only current module under the *Medical* heading is *Medical Billing / Charges.* iSOMS already allows you to write medical *information* in the booking record of an inmate. However, this module allows you to track billing, provider, insurance, claim processing, etc. This module allows you to search medical charge history, view current records, create new records for inmates, and run reports on medical charge records.

Medical Billing / Charges

The **Medical Billing / Charges** module allows you to record billing information for medical charges for inmates. You can record the provider, the inmate / agency's insurance, claim processing and more. You can also run reports on these records to get a list or statement record to print the records.



The first part of this section explains searches. If you need explanations on an already existing record, see the *Filling Out a Medical Charge Record* to get more information on the different fields and tabs available.

Searching for Existing Medical Charge Records

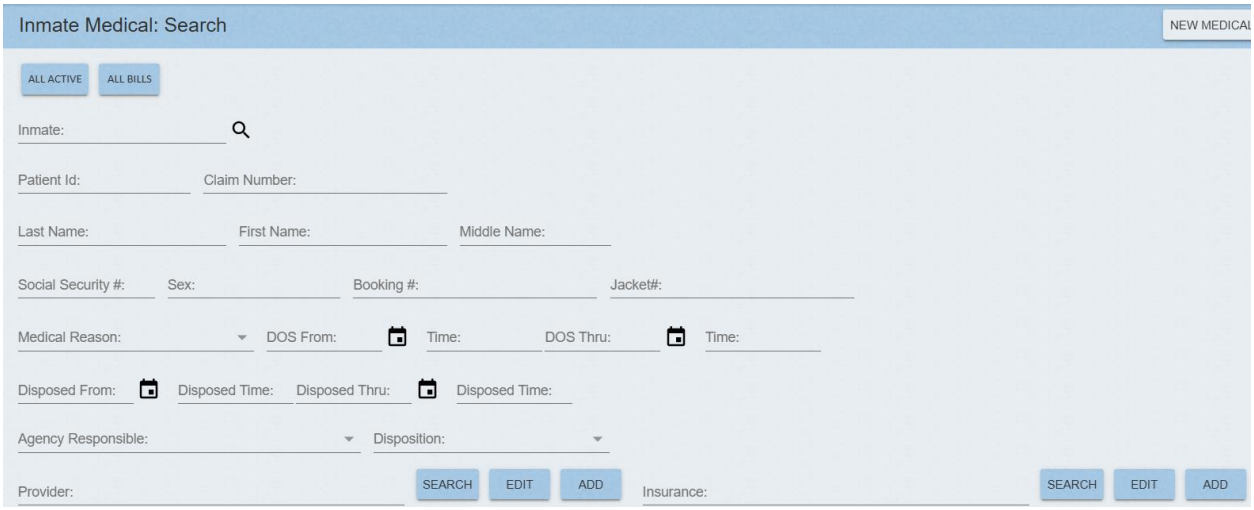
To search existing medical charge records, begin on the iSOMS home screen.

Navigate to:

Corrections → Medical → Medical Billing / Charges

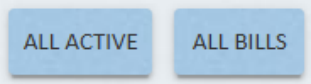


This will open the **Inmate Medical: Search** screen. Here you can search and filter for different medical charge records. You can either use the blue buttons to do *quick searches* or enter information in the fields to do *standard searches.*



Quick Searches

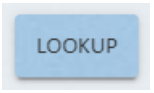
A few different quick searches are available by using the blue buttons.



All Active will show all records that are active but don't have a disposition.

All Bills simply shows all charges records.

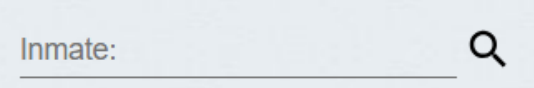
Standard Searches



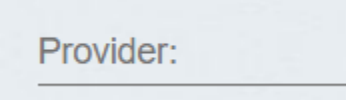


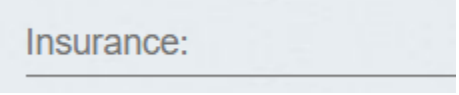
Various fields are available if you need to do a search that the quick searches won't work for. Fill in the fields to narrow the search and click **Lookup** at the top or bottom of the page to perform the search. If you need to start over, simply click **Clear Filter** to remove all search field entries.

Selected Field Explanations



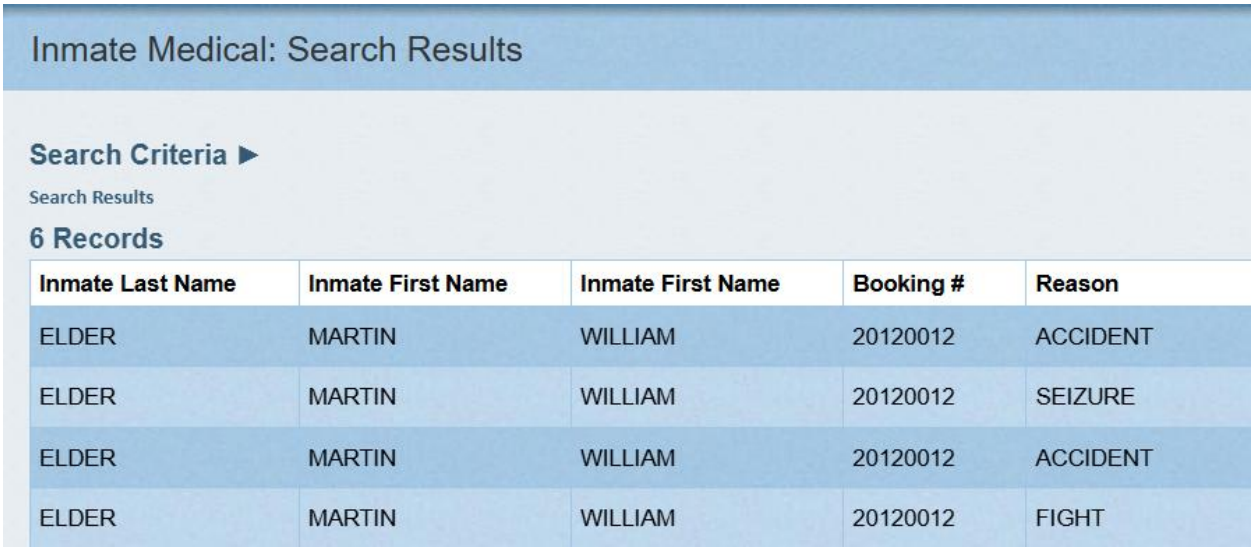
This field, **Inmate**, lets you search for a specific inmate's records. Just type their name and a search box will open, or click the magnifying glass and you can find an inmate to search for just their medical charge records.





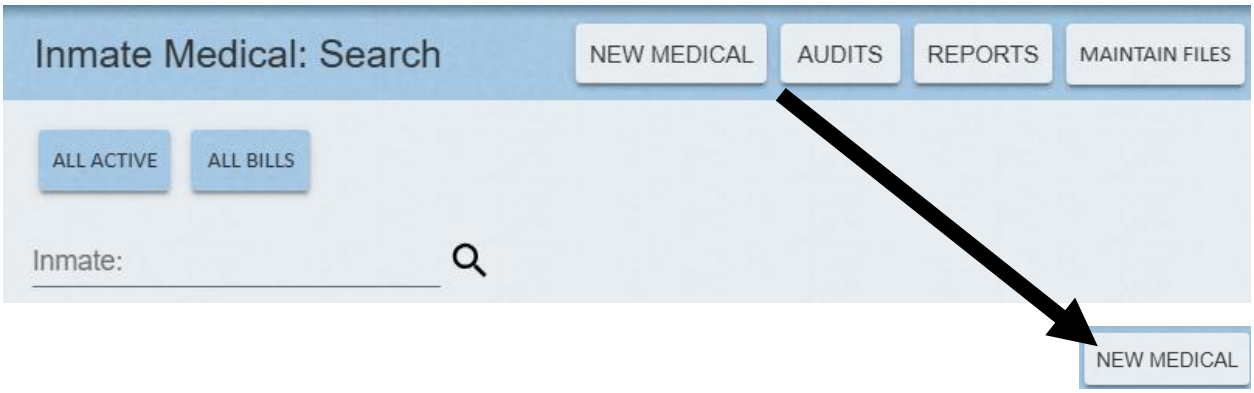
Use these fields to narrow the search by the provider or insurance. You can hit **Search** beside them to find the list of current organizations you have in your records. This will help you find what you can search for.

As mentioned above, when you have finished with your search parameters, click **Lookup** to perform your search. Double click on the desired entry to view, edit, or delete the record.



Creating a Medical Charge Record

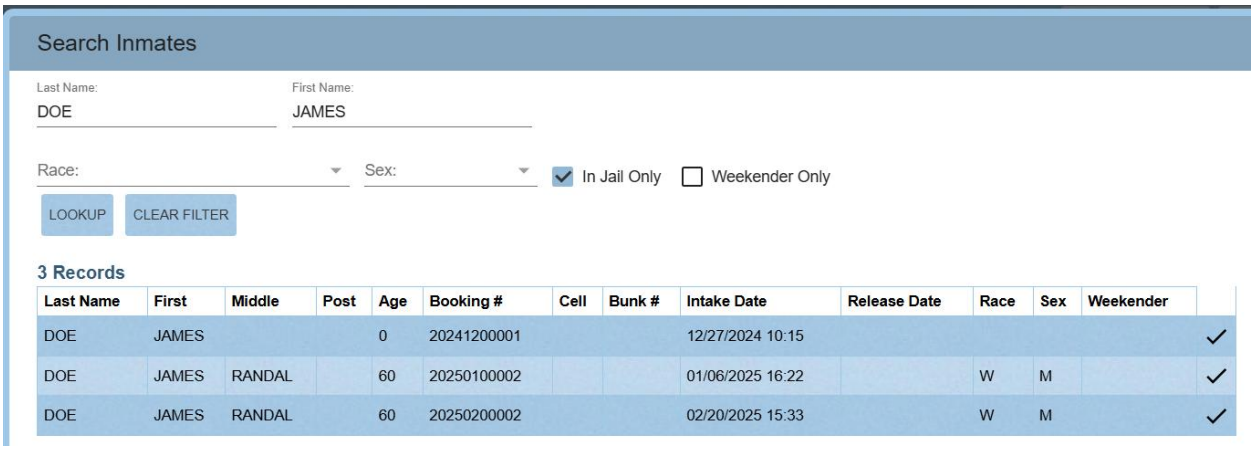
To create a new medical charge record, click **New Medical** in the upper right corner of the Inmate Medical search screen:



This will open a search box. Type the name of the inmate and a search box will open, or click the magnifying glass and you can find an inmate to add an medical charge record for. You can also tell iSOMS to use the default City/State/ZIP for this new entry.



Add name or other search parameters and click **Lookup.** Click the checkmark symbol (✓) to select the inmate for the medical charge record. Then click **ADD** to create a new record.



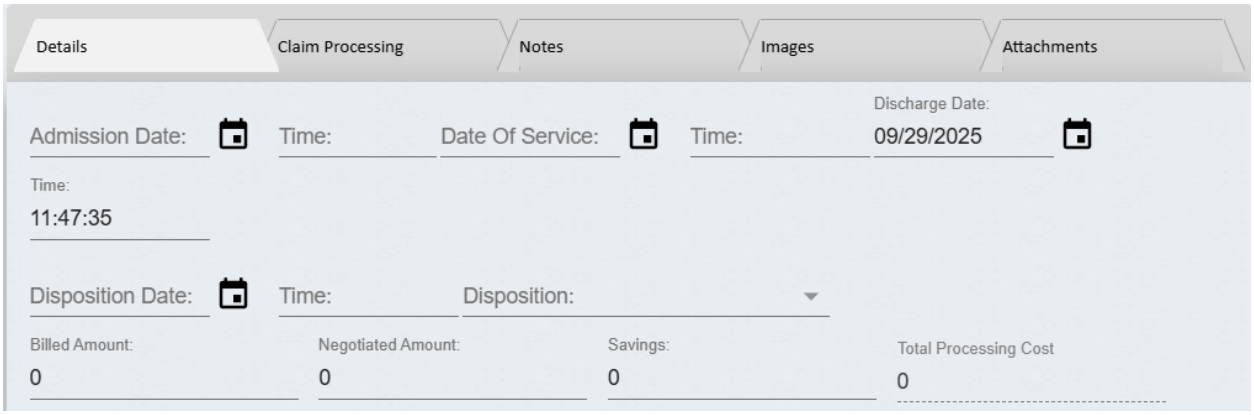


There are two primary sections of the report:

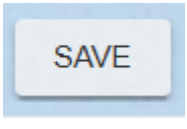
1. The *fields* in the upper part of the screen. These record details about the inmate, the reason for the medical event, the party responsible, the provider, and the insurance.



2. The *tabs* record details on the charge, claim processing, notes, images, and attachments for this record.



Details records details about the medical visit. **Claim Processing** lets you record processing info, especially if charged by a 3rd party. You can also add **Notes, Images,** and **Attachments**. This process is covered in detail in the next section, *Filling Out a Medical Charge Record.*

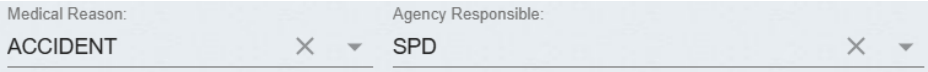


After you enter new details, make sure to click **Save** at the top of the screen.

Filling Out a Medical Charge Record – Fields

This section explains in detail the different fields and tabs for a Medical Charge Record. The top section of the report with fields should always be filled out when relevant information is available.

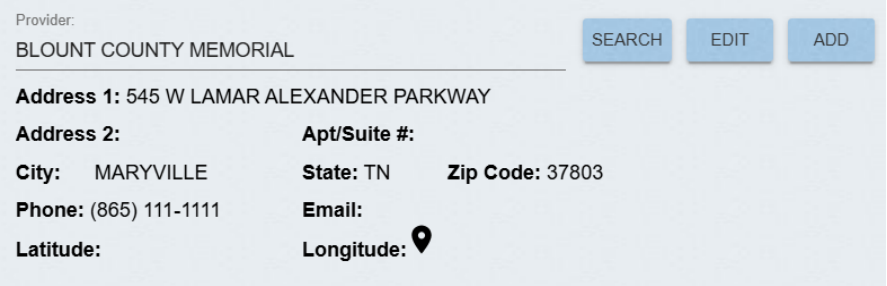
Fields



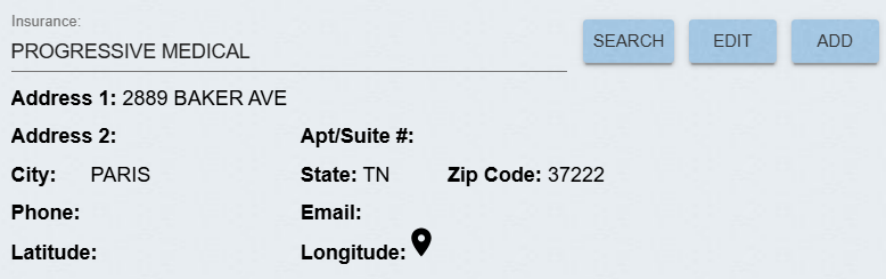
First, add the reason for the medical charges in **Medical Reason**, such as *Fight, Accident, Heart, Use of Force,* etc. You can record the **Agency Responsible** for the charges (if any) here as well.



These checkboxes relate to the billing of the inmate. Mark if the inmate is **Self Insured,** if they are **Eligible** for payment, or if the charges should be billed to the inmate in **Bill Inmate**.



This field allows to record the provider where the inmate received medical care.



This field allows you to record the insurance company paying for the charges.

For both of the above fields, if you already have the business in your records, simply type the name (such as **PROGRESSIVE MEDICAL**) and it will appear automatically. If you don't have the business in iSOMS or for more information on inputting new organizations into iSOMS for quick reference later, see *Appendix C, Business / Organization Records* on page 728.

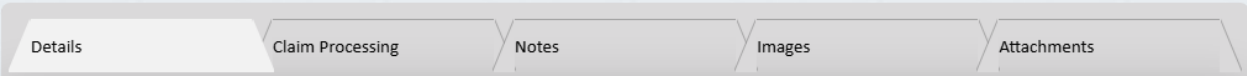
Filling Out an Medical Charge Record – Tabs

Summary

Details records details about the medical visit, such as admission and discharge dates, disposition info, billed amount, final amount, payment info, and more.

Claim Processing lets you record processing info, especially if charged by a 3rd party.

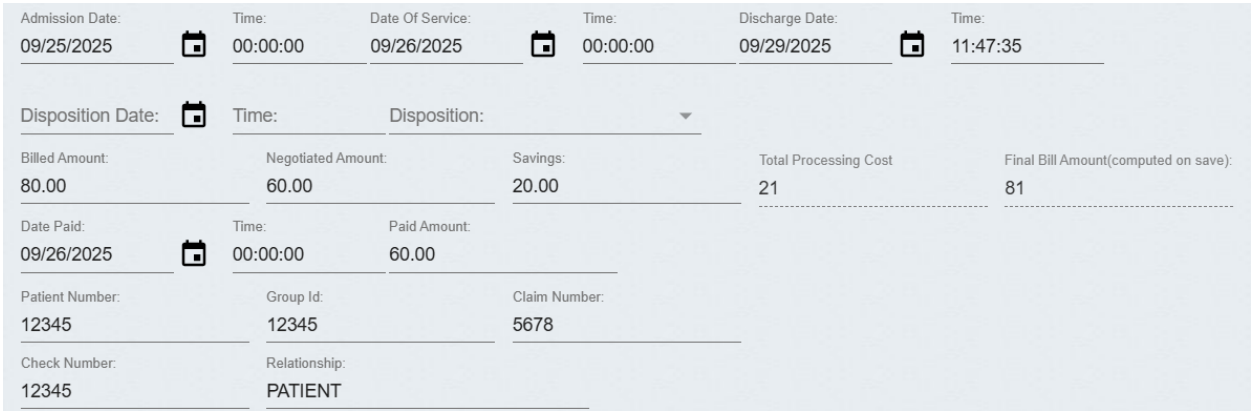
Notes, **Images**, and **Attachments** tabs are available if you need to take additional notes or upload images and documents.

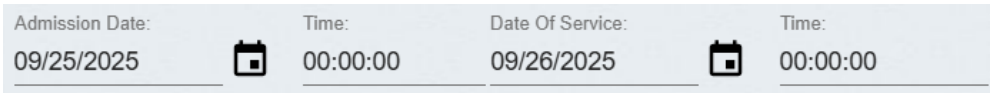


Details Tab



The **Details** tab covers the details about the charges, including admission, disposition, discharge, bill amount, paid amount, and important transaction numbers.

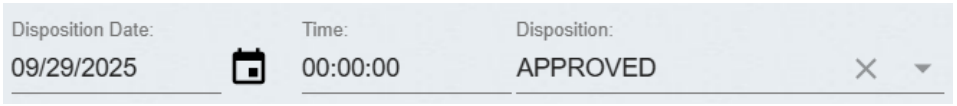




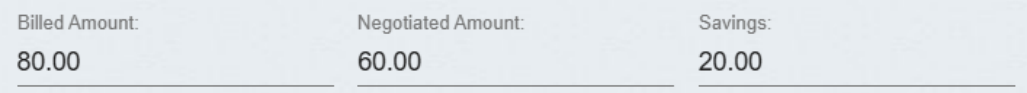
First, add the **Admission Date** and **Time**, then add the date medical care was given (if applicable) in **Date of Service** and **Time.**

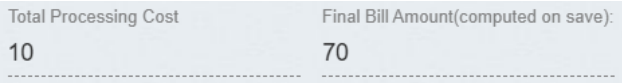


The **Discharge Date** and **Time** are set automatically when the record is created, but you can adjust them here.

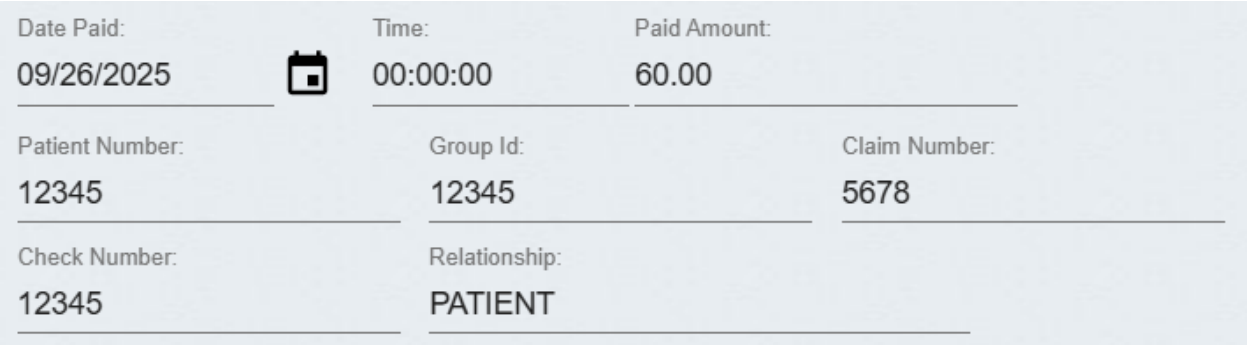


When this medical charge is disposed (such as when paid), add the info in **Disposition Date, Time,** and **Disposition.**



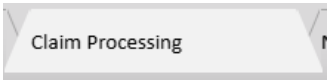


These fields relate to the bill and any savings. Note that **Final Bill Amount** only takes two fields into account. It takes the **Billed Amount** and subtracts **Total Processing Cost** (from under the *Claim Processing* tab).

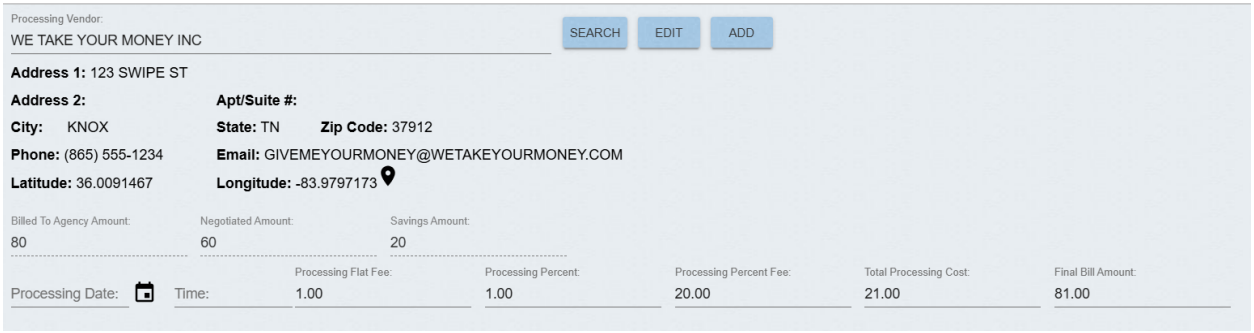


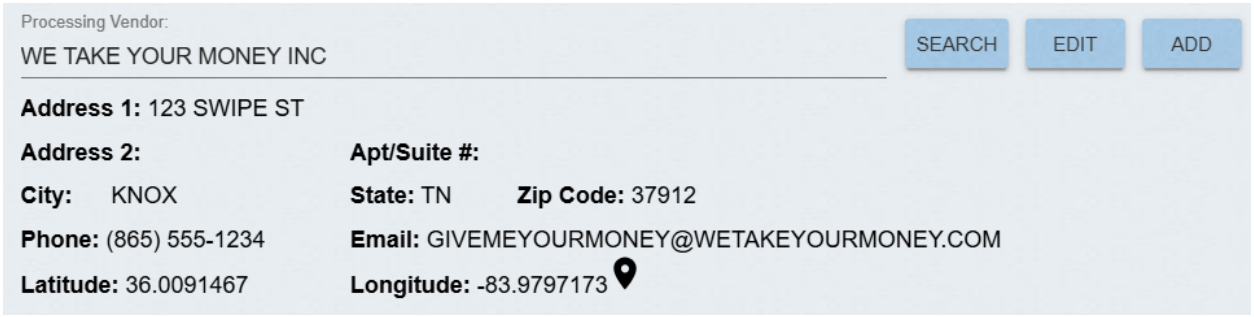
Finally, add all the details of the payment, including any important reference numbers.

Claim Processing Tab



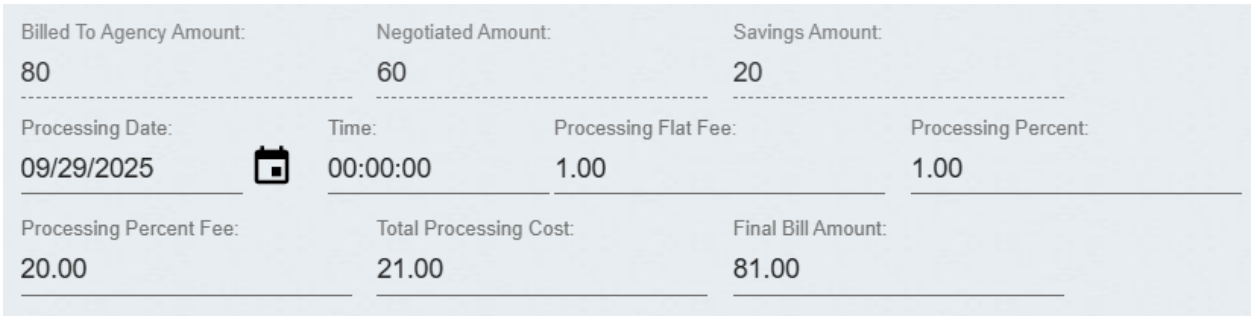
The **Claim Processing** tab contains info on the processing vendor, processing fee, etc.





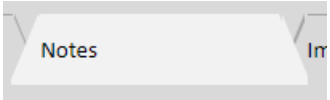
First, add the Processing Vendor (if needed).

If you already have the business in your records, simply type the name (such as **WE TAKE YOUR MONEY**) and it will appear automatically. If you don't have the business in iSOMS or for more information on inputting new organizations into iSOMS for quick reference later, see *Appendix C, Business / Organization Records* on page 728.

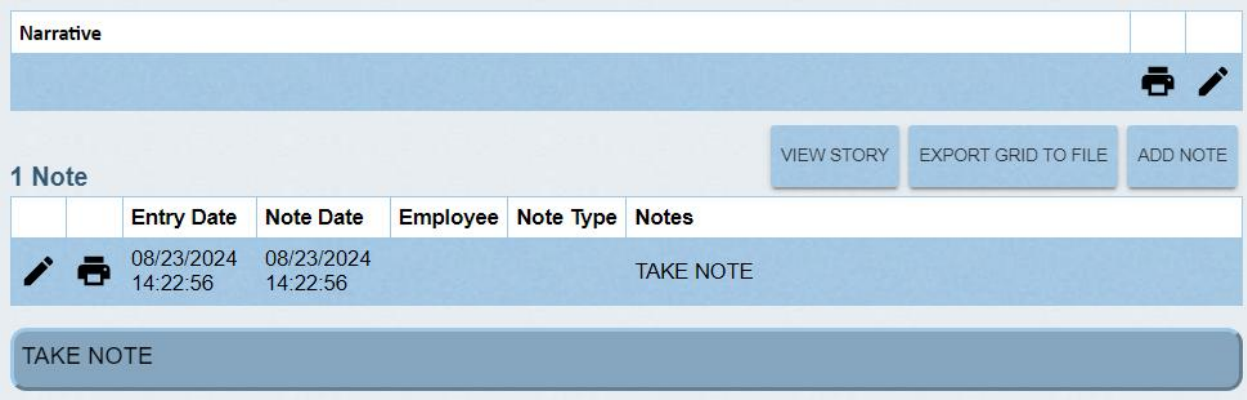


Now add the processing fee details and the date it was paid in the fields at the bottom of the tab.

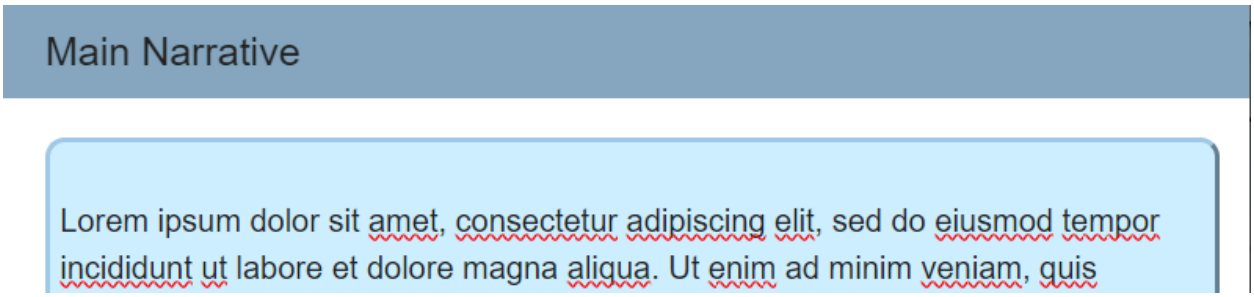
Notes Tab



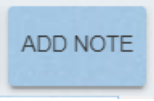
The **Notes** tab is used to view or add notes pertinent to the record. Double-click on any entry in the table to edit or view it.

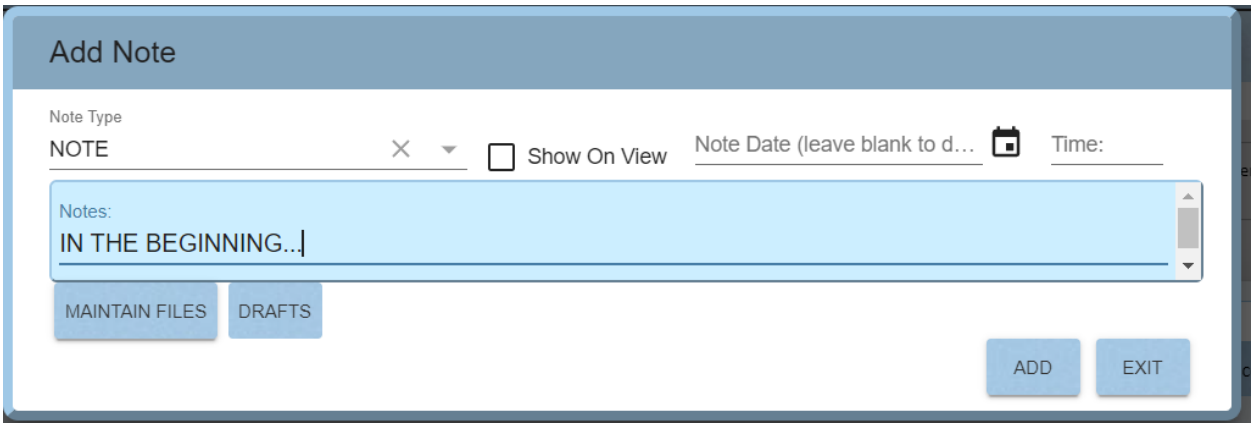


Narrative acts as an area where you can add a long note. This is useful when you want to add important or long form notes that won't be mixed in with the rest of the short notes.



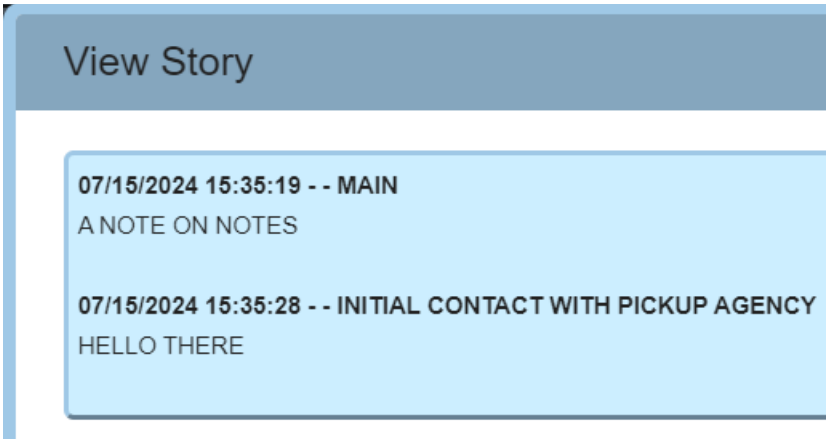
Use **Add Note** to add a new note.





The **View Story** button will show all notes (except Narrative) that have been added on one page.





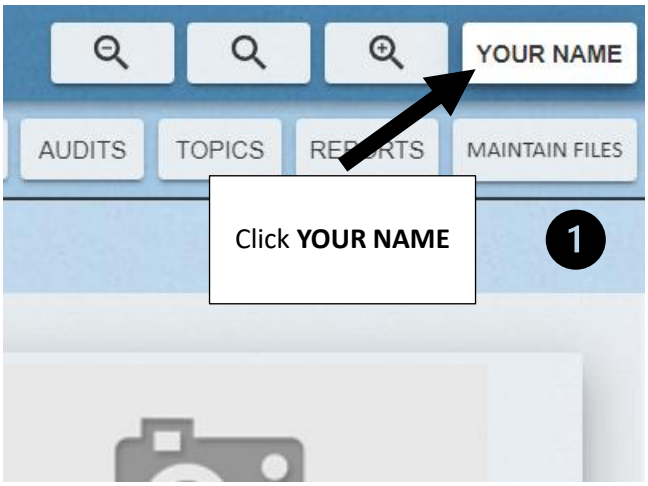
Images Tab

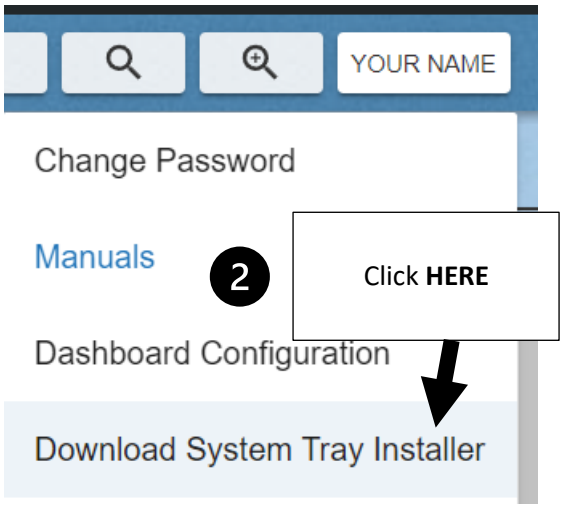


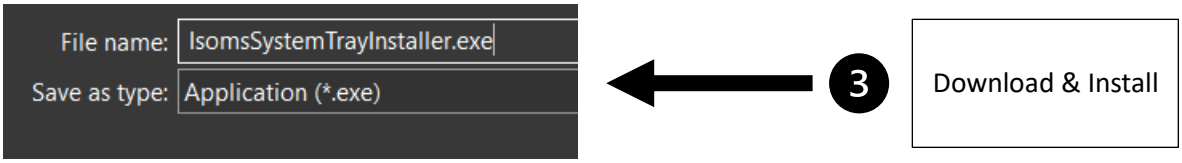
The **Images** tab is used to view, download, or add images. You can add a single image at a time or multiple images at a time. Click **Add Image** to add a single image.



To add multiple images at a time, you will need the System Tray Installer downloaded to the computer you are using. The System Tray Installer can be found on the iSOMS home page by clicking on the button in the upper right with your username. Once you click on that, you will get a drop-down list, and **Download System Tray Installer** is one of the options. Download and install it on this computer.

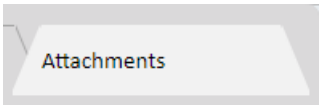






After you have the System Tray Installer on the computer, you can now use the **Add Images** button to upload multiple images at once if necessary.

Attachments Tab

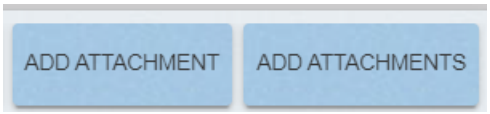


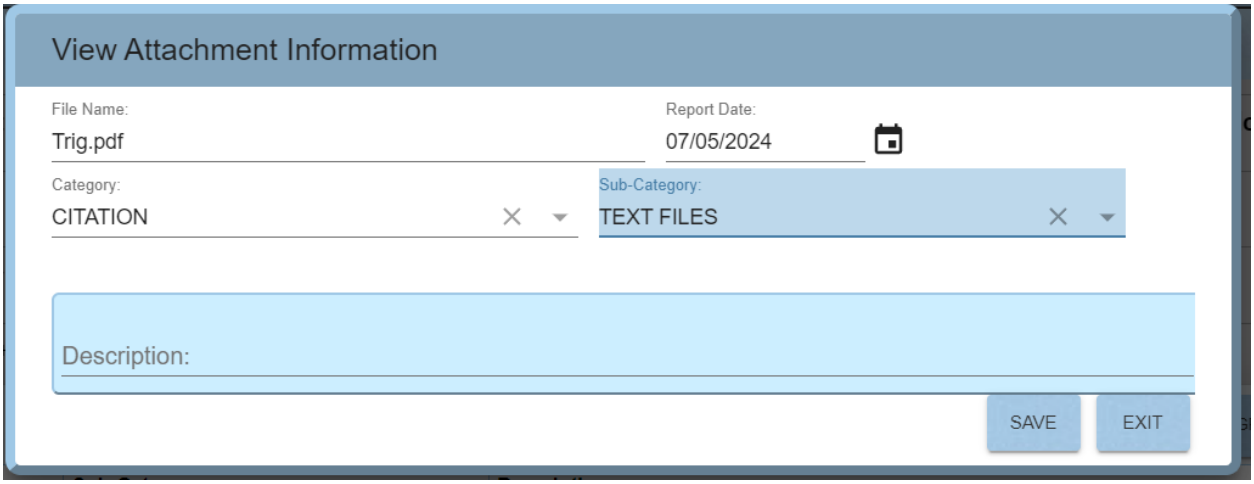
The **Attachments** tab is used to view, download, or add attachments. Double-click a file entry to view the record for the attachment or click on the icon to download the attachment to the computer.



You can add a single attachment at a time or multiple attachments at a time. Just like above with images, you will need the System Tray Installer downloaded to the computer you are using to add multiple attachments at once. See the *Image* tab instructions on the previous few pages for instructions on installing the System Tray Installer.

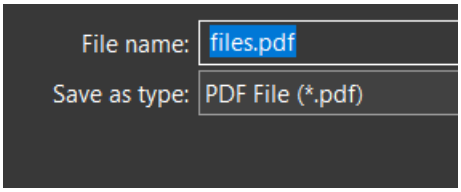
Click **Add Attachment** to add a single attachment or click **Add Attachments** to add multiple attachments at the same time. Choose the attachments from the computer, then add the appropriate category and sub-category for the file.



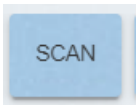


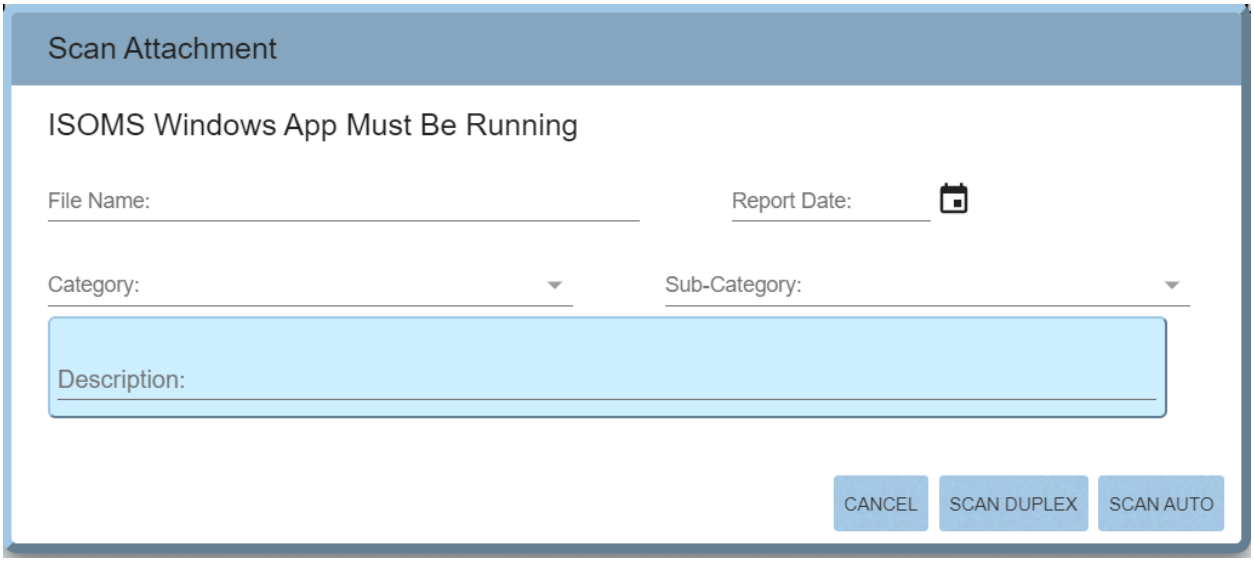
You can also **Download All PDFs** at once by clicking the appropriate button.





If you have the iSOMS Windows App, you can use **Scan** to scan files into the attachments.





Medical Charge Topics

The **Topics** button lets you do special actions in different modules. In **Medical Billing / Charges**, if you use the **Topics** button, you will be able to quickly open the **Shift Notes** module right from here.

Once you have opened a record of the **Medical Billing / Charges** module, you can click **TOPICS** → **SHIFT NOTES** in the upper right.



This will open the **Shift Notes** module. If you want more information on the **Shift Notes** module, please see *Shift Notes* on page 275.

Medical Charge Reports

iSOMS has the capability to allow you to print different types of reports for Medical Charges.

To access the reports, begin on the iSOMS home screen. Navigate to:

Corrections → Medical → Medical Billing / Charges

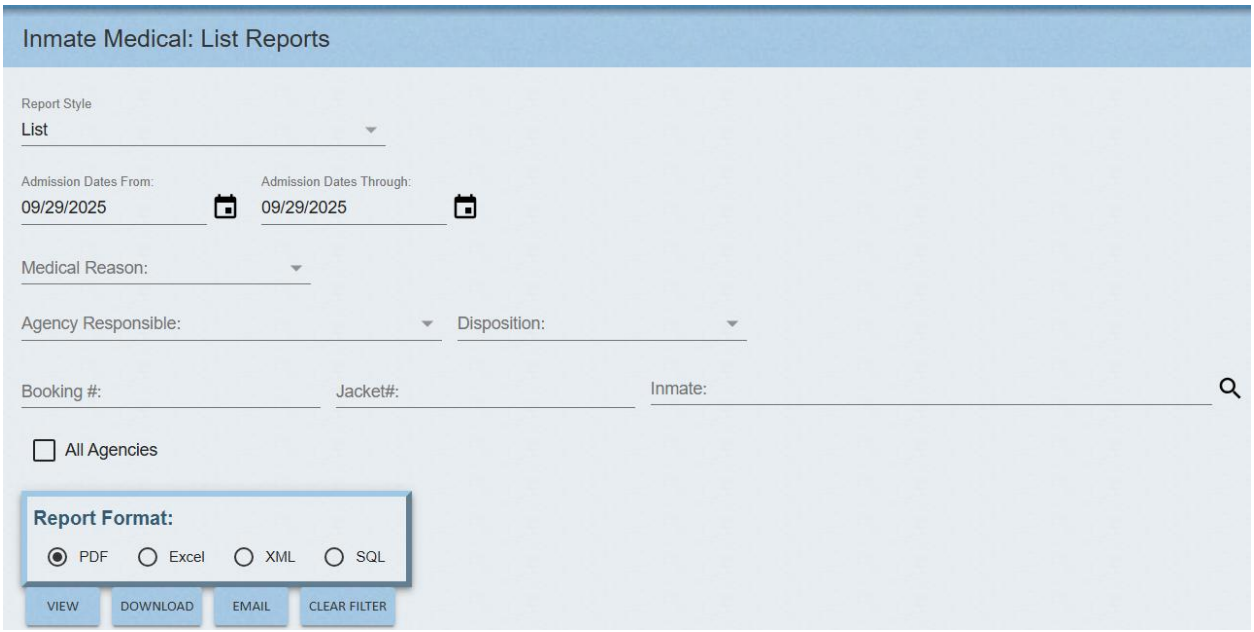


Now click on the **Reports** button in the upper right corner and select the report you wish to run. Different reports are explained over the next set of pages.



List Reports

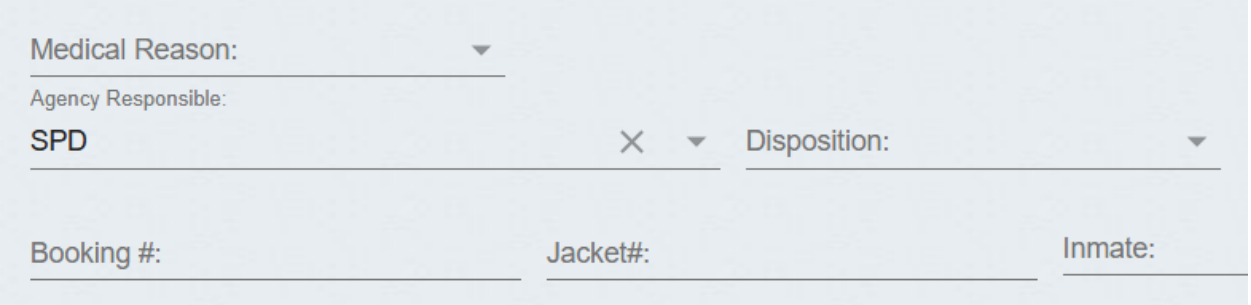
The **List Report** displays medical charge records in iSOMS over a certain date range. In this way you can see a list of records over your chosen time period. Add the start and end date in **Admission Dates From** and **Admission Dates Through.**



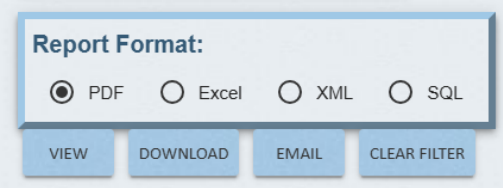
Report Style has some different layout and sorting options, such as *List, Group by Reason, Group by Provider, Group by Disposition,* and more. Pick the one most relevant to your desired result.



You can filter to medical reason, the agency responsible for payment, disposition, and inmate.



Now, with your chosen parameters, click **View** or **Download** to view the report.



List Report

YOUR AGENCY

Inmate Medical Billing

Admission Dates From 02/01/2024 Through 09/29/2025 Page 1 of 1

Inmate Medical Billing

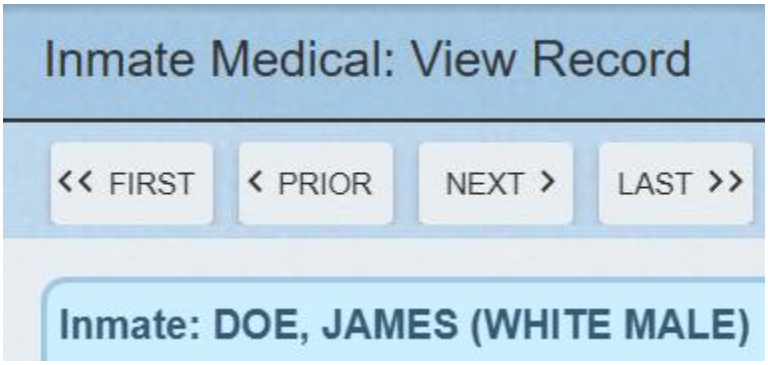
Inmate Name	Booking #	Race	Sex	DOB	Admission Date	Discharge Date	Bill Amount
DOE, JAMES RANDAL	**20250100002**	**W**	**M**	**01/01/1965**	**09/25/2025 00:00**	**09/29/2025 11:47**	**80**

Agency	**YOUR AGENCY**	Intake Date	**09/25/2025 00:00**
Reason	**ACCIDENT**	Release Date	**09/29/2025 11:47**
Provider	**BLOUNT COUNTY MEMORIAL**	Patient Id	**12345**
Disposition	**No Disposition Selected**	Disposition Date	

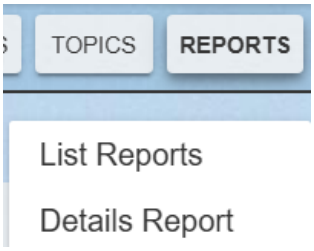
Detail Report

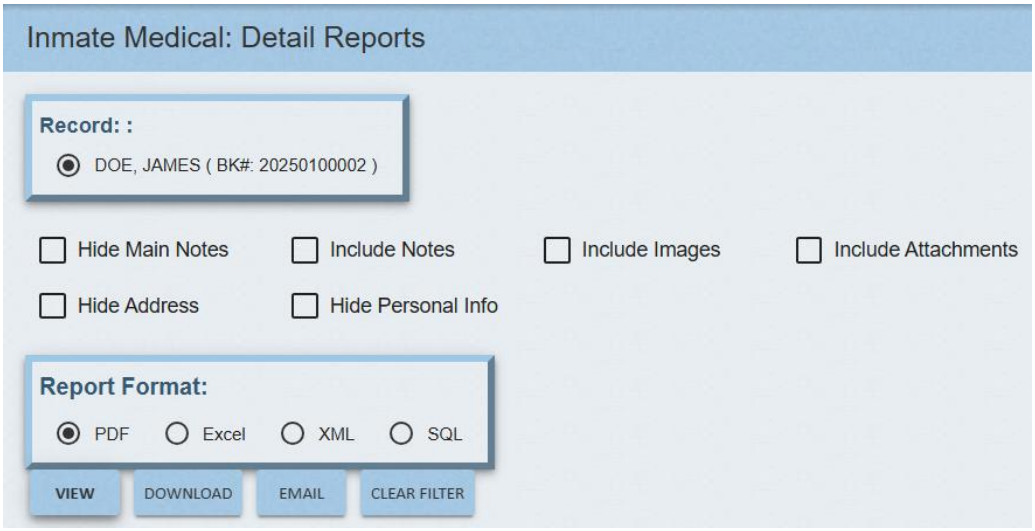
This report displays many details for individual medical charge records.

First, go to the record you want to make a detail report for and open its record in iSOMS.



Then click **REPORTS → DETAIL REPORT** to open the Detail Report screen.





Choose what you would like included on the report, such as notes, images, or attachments. And with your chosen parameters, click **View** or **Download** to view the report.



YOUR AGENCY

Inmate Medical Billing

DOE, JAMES RANDAL
1142 OXFORD HILLS
MARYVILLE, TN

Booking#: **20250100002**
Cell:
Bunk:
Intake: **01/06/2025 16:22**
Release Date:
SSN: **123-45-6789**
DOB: **01/01/1965 00:00**

The resource of this report item is not reachable.

Provider: **BLOUNT COUNTY MEMORIAL**
Insurance: **PROGRESSIVE MEDICAL**
Medical Reason: **ACCIDENT**
Agency Responsible: **SPD**

Self Insured: **No**
Eligible: **Yes**
Bill Inmate: **No**

Details

Admission Date: **09/25/2025 00:00**
Disposition:
Date Paid: **09/26/2025 00:00**
Patient Number: **12345**
Check Number **12345**
Billed Amount: **80**

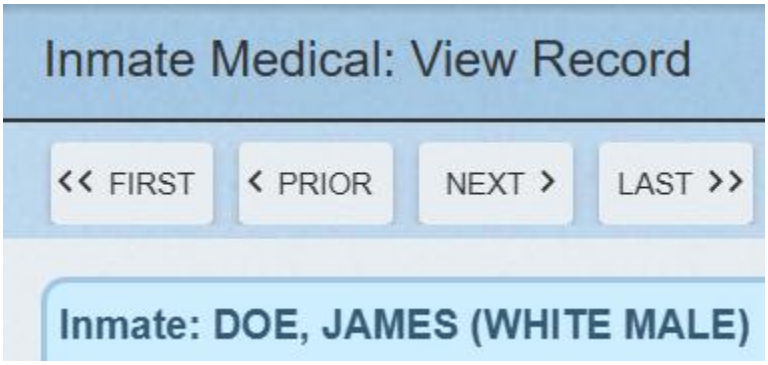
Date of Service: **09/26/2025 00:00**
Disposition Date:
Paid amount: **60**
Group Id: **12345**
Relationship: **PATIENT**

Discharge Date: **09/29/2025 11:47**
Claim Number: **5678**

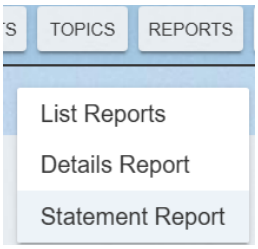
Statement Reports

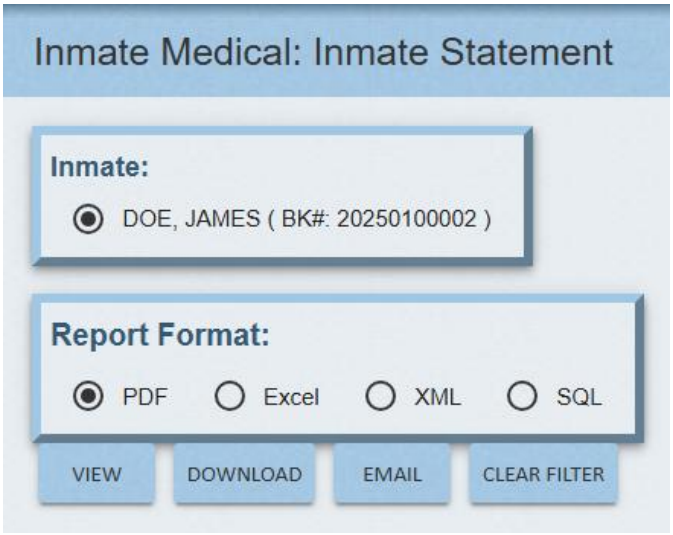
Statement Reports let you print out a statement, like a bill, for an individual charge.

First, go to the record you want to make a statement report for and open its record in iSOMS.



Then click **REPORTS → DETAIL REPORT** to open the Detail Report screen.





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



YOUR AGENCY

Inmate Medical Billing

Page 1 of 1

BLOUNT COUNTY MEMORIAL
545 W LAMAR ALEXANDER PARKWAY
MARYVILLE, TN 37803

Any questions regarding your bill?
Call (865) 380-4600

Pay By Credit Card

☐ VISA	☐ MASTERCARD	☐ DISCOVER
Card Number		Card Security Code
Exp. Date	Zip Code	Signature
Statement Date 09/29/2025	Pay This Amount	Account No.
Charges and credits made after statement date will ap0pear on next statement		Amount Paid

1905 HIGH PARK CIR
MARYVILLE, TN 37803

Pay By Check / Remit To

BLOUNT COUNTY MEMORIAL
545 W LAMAR ALEXANDER PARKWAY
MARYVILLE, TN 37803

☐ *Please check box if above address is incorrect or if insurance information has changed. Indicate changes on reverse side.*

STATEMENT

Patient: DOE, JAMES RANDAL **Invoice #:** 5678

Date	Provider	Description	Charge	Payment	Adjustment	Insurance Pending	Patient Balance
09/26/2025	BLOUNT COUNTY MEMORIAL		80.00	60.00	60.00	21.00	81.00

Total Due From Patient: **81.00**

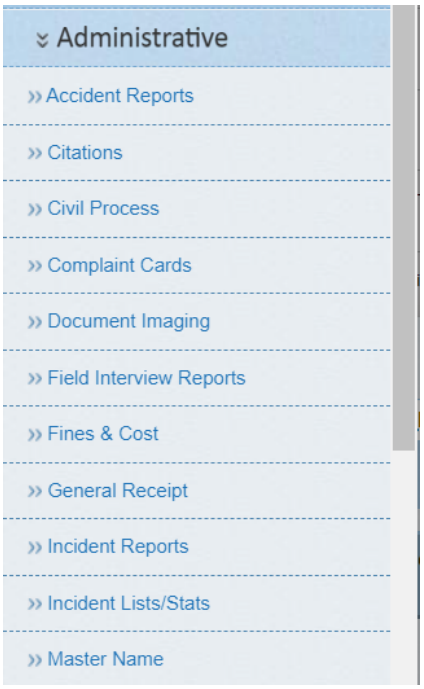
Miscellaneous

Merge Master Names

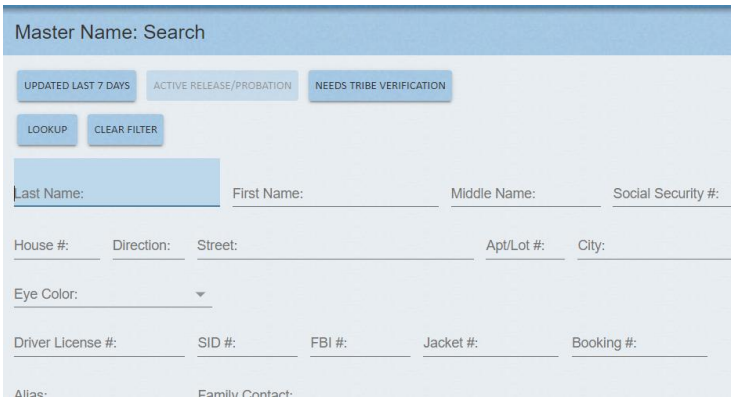
Sometimes you may find that there are duplicate Master Names in the records. This short section will help you merge duplicate Master Names so that you do not have confusion in your records. Navigate to:

Records → Administrative → Master Name



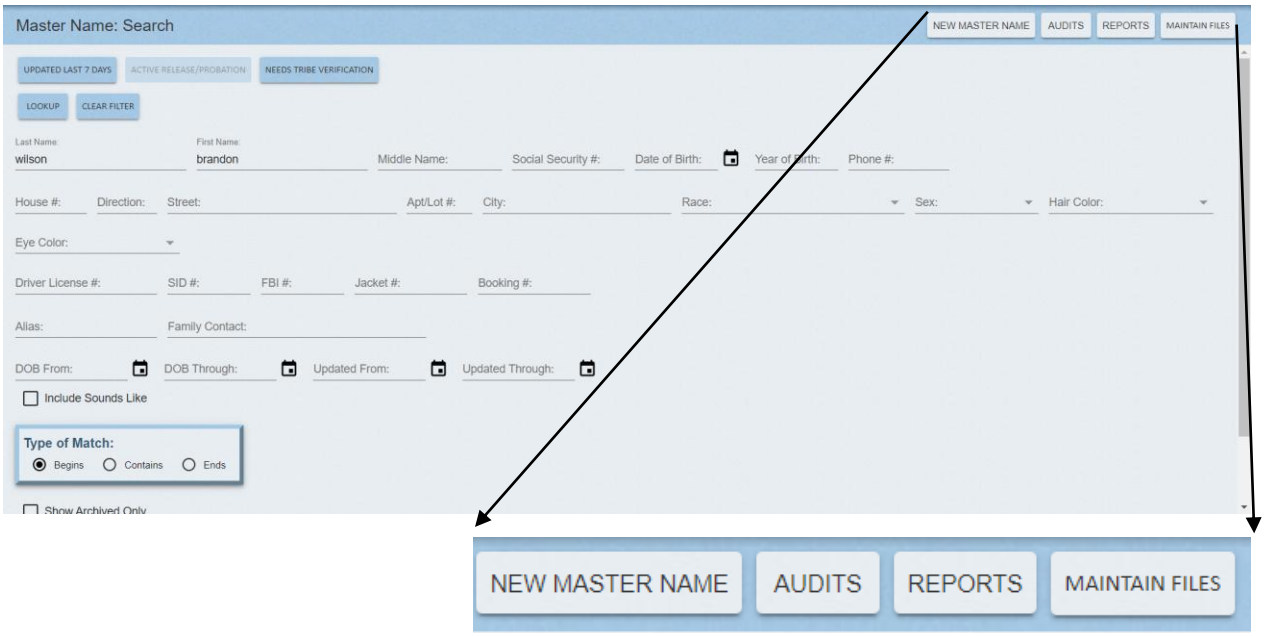


This screen is the Master Name Search Screen. Here you can search for Master Names.



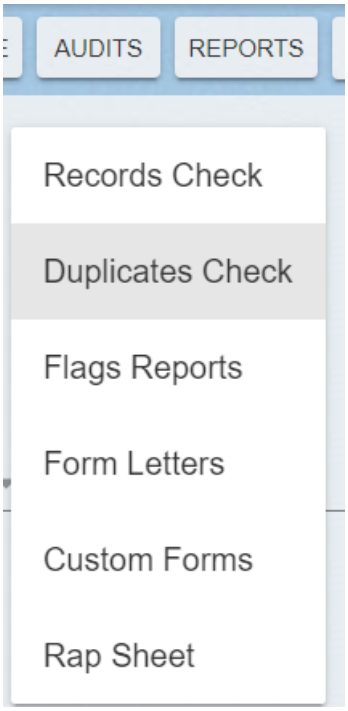
Corrections Manual

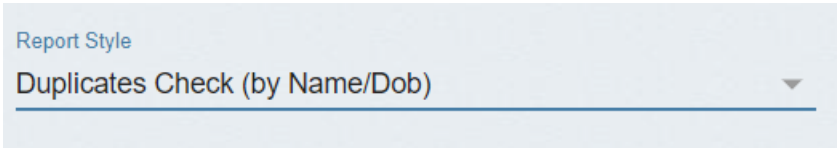
If you are looking to find duplicates that you may be unaware of in your Master Name system, you should use the **Reports** to do a Duplicates Check. To do a duplicates check, click the **Reports** button in the upper right corner of the screen.

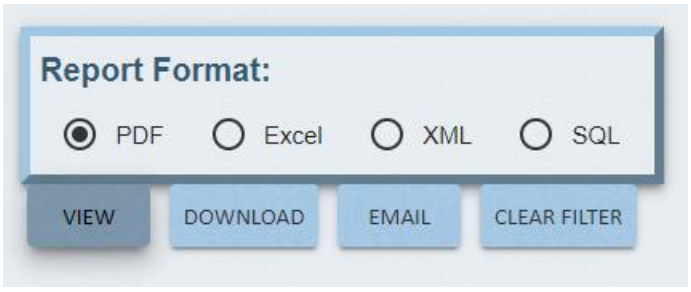


At this point, you will see a drop-down menu. Click on **Check for Duplicates**.

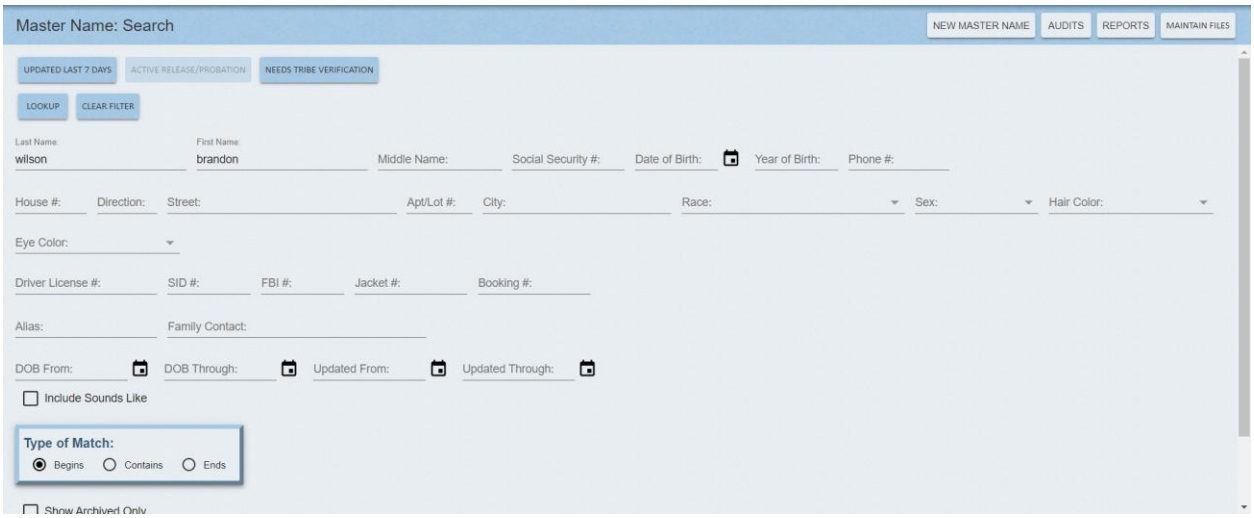
This will open a screen where you can check for duplicates in the Master Name records. Under *Report Style,* you can choose to either search for duplicates based on Name & DOB or based on Social Security Number. In this manner, you can discover any duplicate files that would need to be merged. Just ensure (especially when using the SSN search) that the two files are actually the same person.



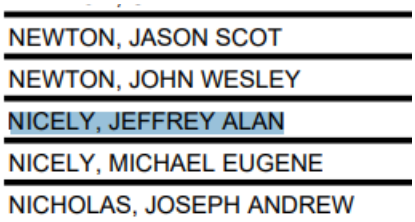




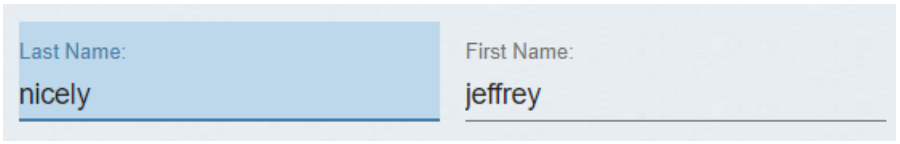
Now we need to merge the discovered duplicates in your records, whether it is from a Duplicates Check or from simply seeing them when performing other tasks. Once you find the duplicates, you should look up one of the duplicate records using the Master Name Search Screen mentioned before.



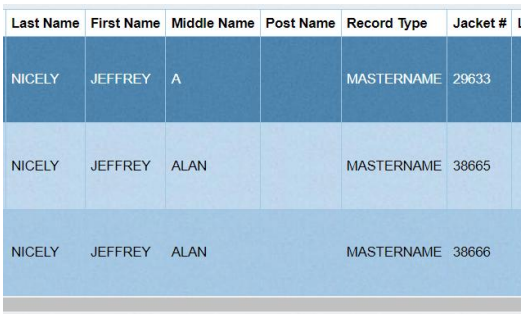
Let's look at an example to help follow the steps. Suppose you had multiple Master Name entries for Jeffrey Nicely, which you found under the Duplicates Check:



At this point, you should search for the duplicate name in the Master Name Search screen.

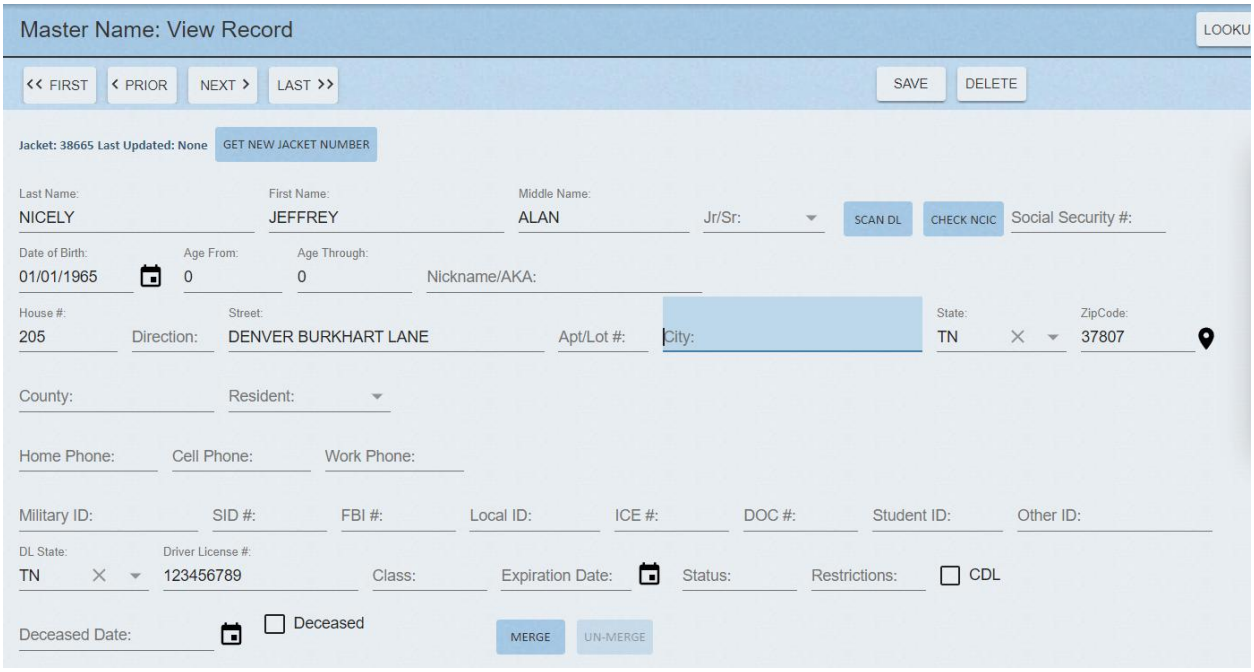






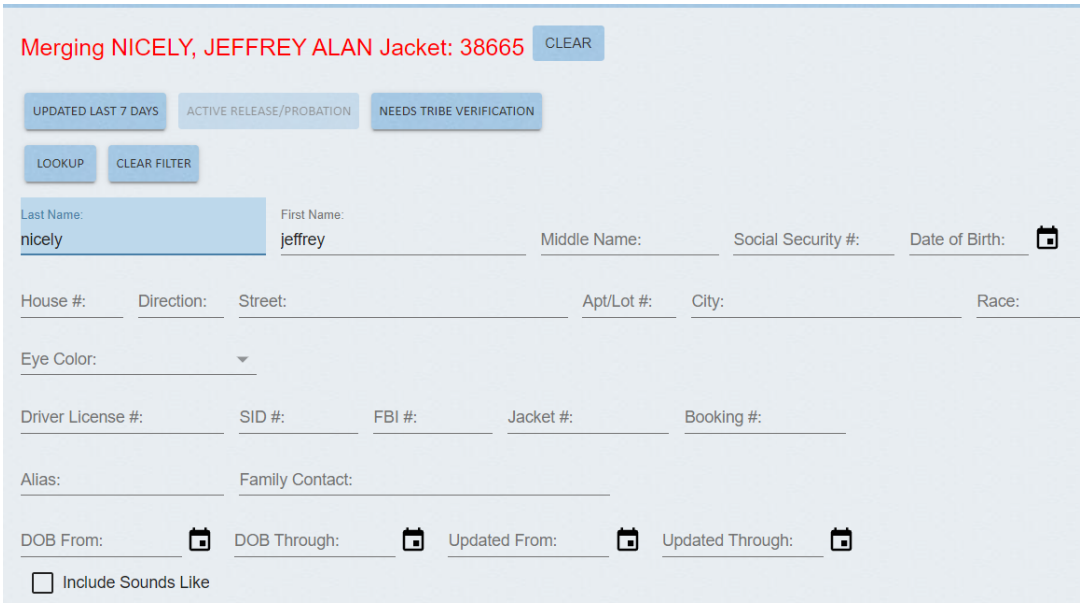
Last Name	First Name	Middle Name	Post Name	Record Type	Jacket #
NICELY	JEFFREY	A		MASTERNAME	29633
NICELY	JEFFREY	ALAN		MASTERNAME	38665
NICELY	JEFFREY	ALAN		MASTERNAME	38666

Double click on the entry in the table, and you will see their Master Name record appear.



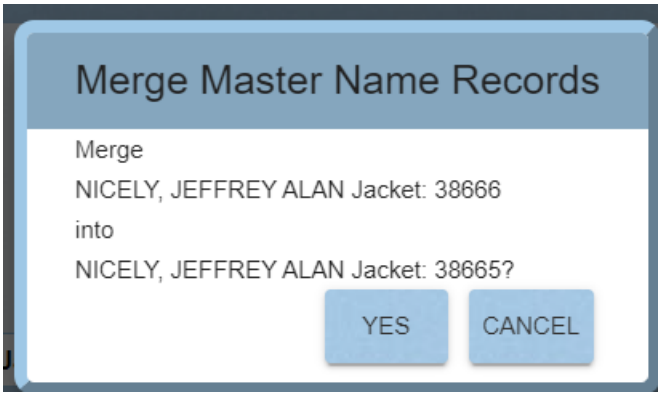
Click on **Merge** near the bottom of the screen. This will open up a search so you can search for the duplicate record. If you just found this record from the search, the name may already be typed in the search fields.





Using the search fields, find the duplicate record that should be merged with this record. Notice in this example that there is another Jeffrey Nicely with a different Jacket #. The crossed-out entry is this current one you are merging, so you cannot select it. You need to click the small square box to the left of the record you want to merge **into the one selected originally.**





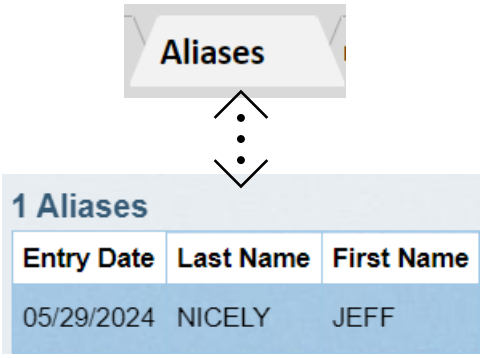
iSOMS will ask if you want to merge the Master Name records. Click **Yes** if you are confident that these are duplicate records. This will create a merged file and clean up your Master Name records.

Once you have merged two Master Names, the removed one will become an alias on the original's record. This keeps the original name record, which is especially useful when someone was going by a different name than their real name. Note the names listed here are for the alias: the name of the person will be stored in the main fields and not the alias tab.

ALIAS

Created by the merge

Under the Alias Tab



MASTER NAME

Original full name, not an alias

Under the main entry at page top



For More Information…

We hope this manual has been helpful to you and your agency. If you have any more questions, don't hesitate to call us at 888-644-5786.

Appendix A: Movement Reasons

This is a list of the default movement/tracking reasons. (See *Movement*, page 123 for more info)

List of Inmate Movements / Tracking Reasons

Activity at Armor
All Laundry
Any Inmate Move.
Attn./Client Visit
Back in Cell
Back in Facil.
Book in Juvenile
Book in Inmate
Cell Assign. NEW
Cell Check
Cell Check Use
Classification
Commissary Order
Count Each Inmate in All Cells
Court Order Inmate Furlough
Delete an Inmate Record
Dispense Medication
Dr. Visit Inside Facility
Dr. Visit Outside Facility
Drug Court
Emergency Committal Papers
Escape
Evidence Room Log
Facility and Preventative Maintenance
Fire Drill
Food Services
Furlough
House Inmate Elsewhere
Infirmary/Doctor Visit
Inmate Court Date
Inmate Exercise
Inmate Haircut
Inmate Incident Occurred
Inmate Meals Delivered
Inmate Medical Event
Inmate Money / $ Order
Inmate Property Room
Inmate Suicide Watch Log
Inmate Visitor(s)
Inmate Work Release
Inmate to AA Meeting
Inmate to GED Classes
Key Log
Laundry Room Duty
Legal Request
Library Books Give/Return
Lockdown
Log Phones, Lights, CPU
Logging Visitors
Mattress Sanitation
Medical Request
Medically Ordered Snack
Note
Off Lockdown
On Call Nurse Notified
Outside Inmate Exercise
Parole Hearing
Pod Officer Check
Razors and Clip. Distr.
Reactive Released Inmate
Receive/Send Mail
Rejected Mail
Release an Inmate
Restraint Device Use
Safety and Sanit. Check
Scheduled Release Date
Security Event
Send Inmates to Church
Shift Change
Shots
Special Request
Special Tour
Special Visit
Supervisor Chk. (Inhab.)
Supervisor Chk. (Uninhab.)
Supervisor Chk. (Segr.)
Toliet Paper/Hygiene
Unsch. Search of Cells
Warrant Traffic
Work Detail
Work Location Change

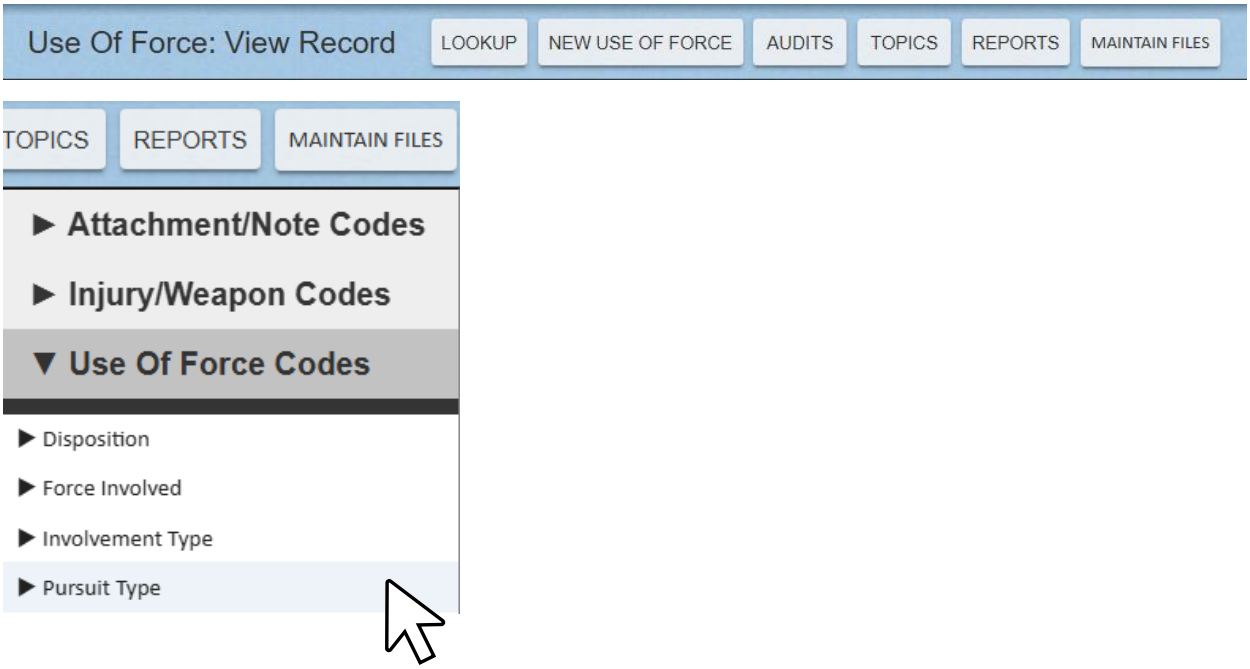
Appendix B: Maintain Files Procedure

Many dropdown options are present in iSOMS. You can use **Maintain Files** to add to them. To use this, click **Maintain Files** at the top right of the screen. Then navigate to the correct code section and choose the appropriate option for the code you want to add. We will do one example, but you can find the right option to change any dropdown beside it in the main manual entry for that field.

> **IMPORTANT:** Only a person with Super User permissions can change **Maintain Files** settings. Make sure you have a Super User editing if using that method.

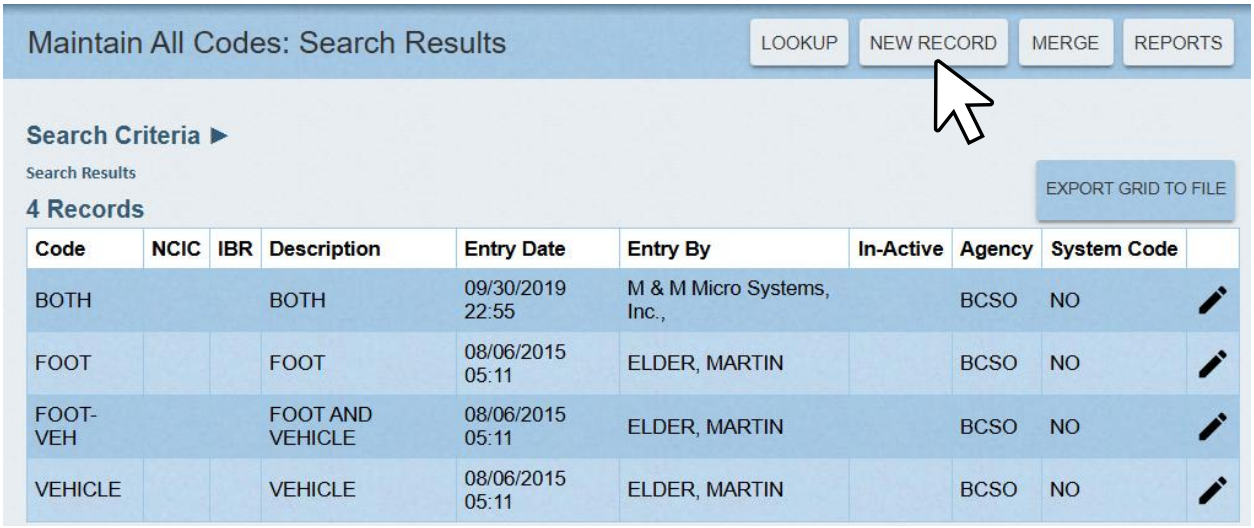
The method of adding codes (and the way to edit current codes) is to use Maintain Files. As an example, let's change the **Pursuit Type** dropdown to have a new option, *Horseback.* Navigate to the *Use of Force* module under **Corrections → Inmate Tracking → Use of Force**, and then click**:**

Maintain Files → Use of Force Codes → Pursuit Type

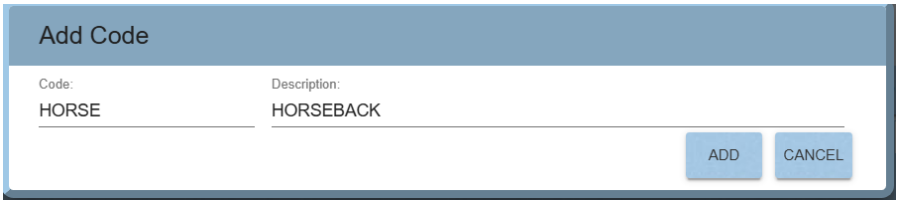


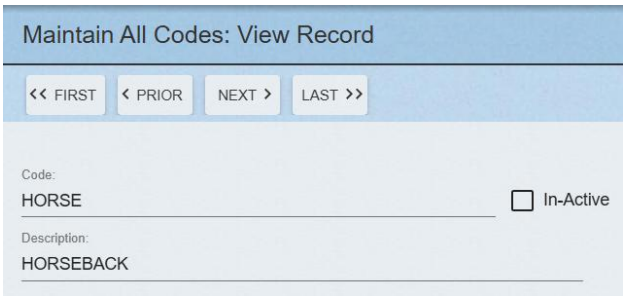
This will open the list of all the current codes for *Pursuit Type.* If you want to edit a current code, find it in the list that appears and double-click it.

To add a new code, click **New Record:**



On the screen that appears, type the **Code** (system hidden name) and **Description** (the actual words displayed for users), and then click **ADD** to add the code. This will open a new screen, but you can just hit **Save** and exit the code record; we do not need to add any special functionality.





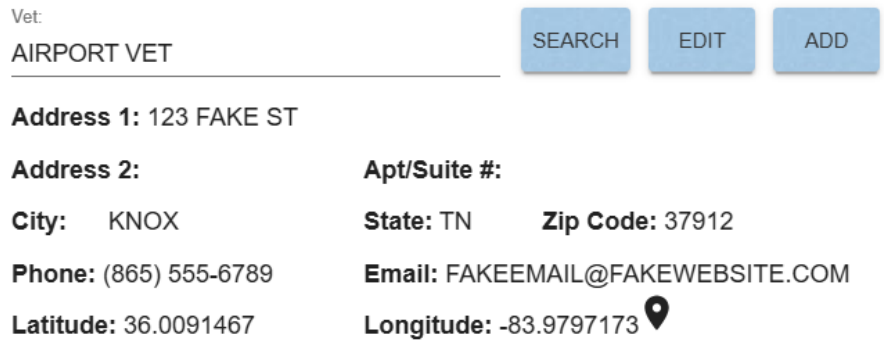
If we go back to the *Use of Force* records, we find the new option in the **Pursuit Type** dropdown:



A Super User can follow this procedure and similar ones to add additional codes for more options to almost any dropdown in iSOMS.

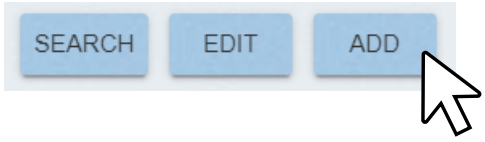
Appendix C: Business / Organization Records

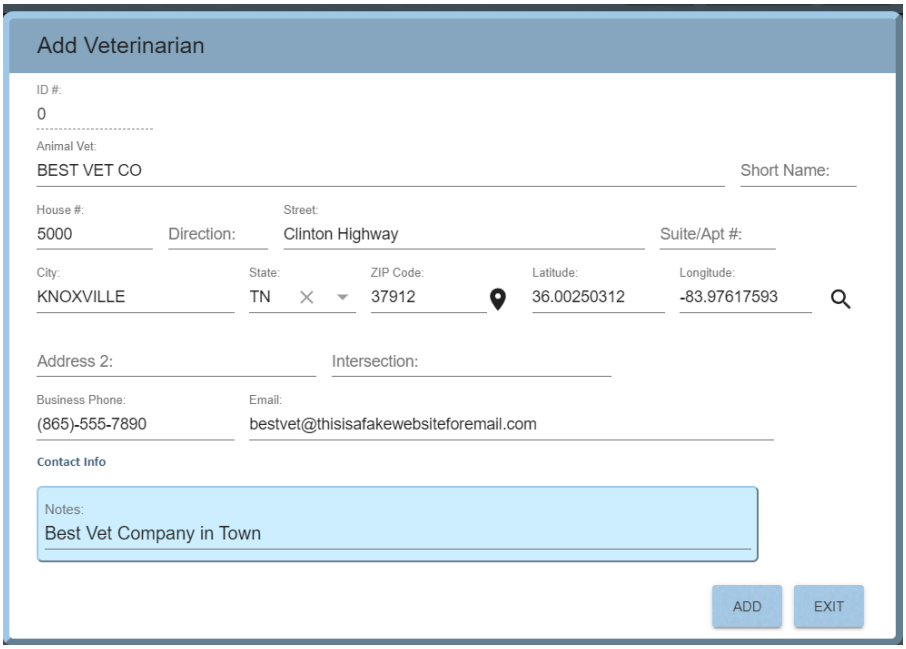
iSOMS has various sets of business and organization records, which works by storing records of organizations. This makes it so that you do not have to continuously re-enter the same information on the same business or agency. We will use this as an example for **Vets** in the K9 tab of *Use of Force,* but it works for all businesses and organizations that have fields that look like this. (**Rescue Groups**, **Departments**, etc.)



To add a new organization:

Click **Add** to add a new entry. Enter the organization information in the window, click **Add** at the bottom of the window, and then this will be marked as the animal's vet organization.

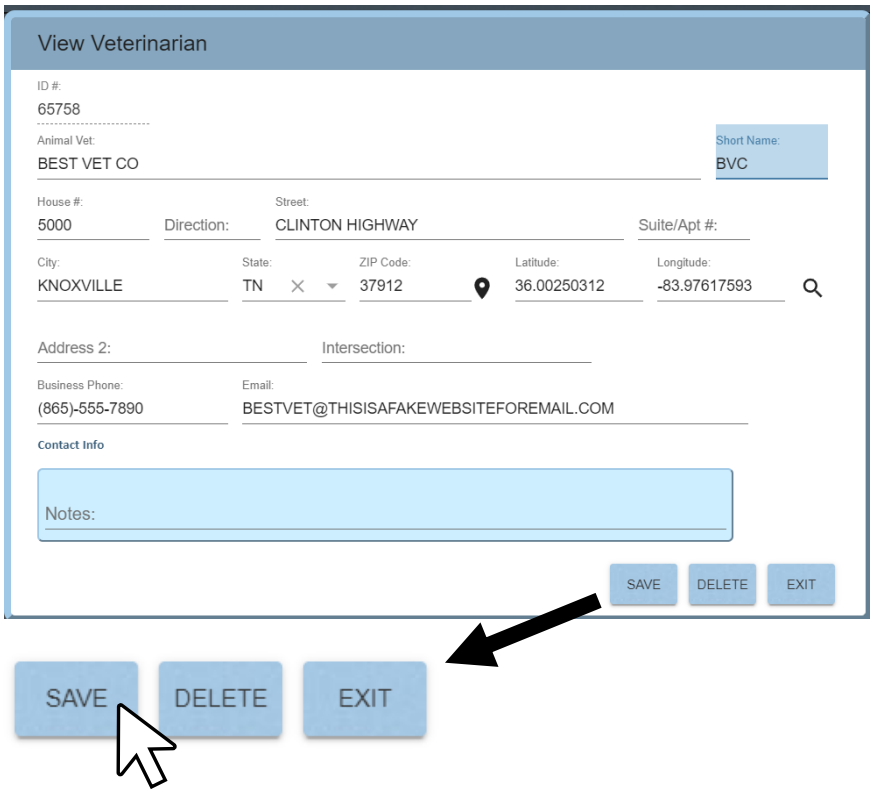




To edit a current organization:

Click **Edit** to edit the current organization which is selected. Click **Save** when you are done editing this organization.





Continued on the Next Page

To use an existing organization:

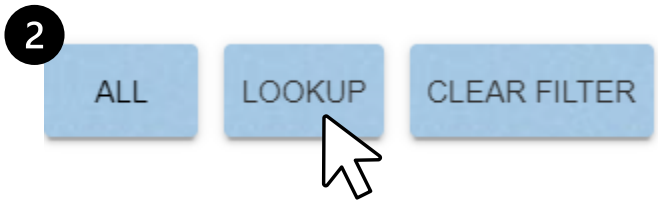
Click **Search** to use an existing organization.



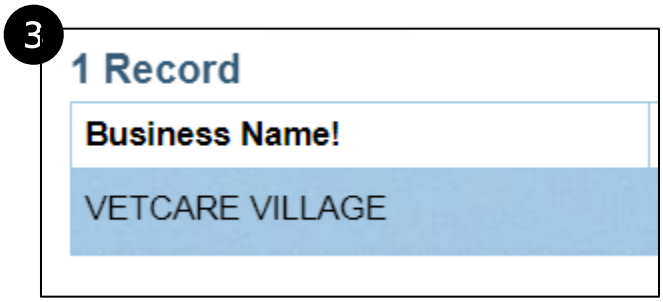
Enter the name or other identifying info.



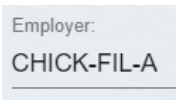
Click the **Lookup** button near the bottom of the window in order to find existing records.



Then scroll down the window and select the correct organization from the list by double-clicking their record.



This method can be used for any of the tabs or fields that require an organization, so that you do not have to retype information repeatedly. Examples are showing below.



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Fifth Revision, September 2025

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