Pretrial Guide

Pretrial Guide

The iSOMS Pretrial Services module allows you to record and report on all information related to the pretrial service process. This includes ID info, employer, assessment, attorney info, images, appointments, and more. This guide explains the general process in iSOMS, the way to add and edit records, and how to run reports.

This guide begins with a brief review of the process so you can see the overall picture. After the reference sheet, the more in-depth parts of the guide will follow.

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Overview

1. **Create a New Pretrial Record**

You can add records to the pretrial module and fill out the fields above the tabs section.

Navigate to **Admin → Agency → Pretrial Services** and then click **NEW PRE-TRIAL.**
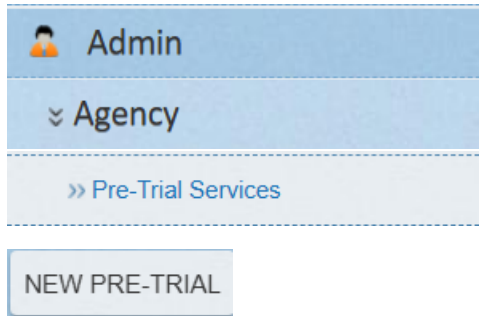
Use an existing Master Name or make a new one. Then fill in the pretrial record fields. If you need to add more options to the dropdowns, see the section below and use **Maintain Files** to add them.

Add Necessary Maintain Files Records

You must add the correct codes to the different types of dropdown fields if you need more.

> It is easier to do this if you understand how the module works. If you are new to this module, go through the process of adding a new record, and then you can add the correct options to the maintain files records.

Click **MAINTAIN FILES** and then choose the code type you need to add.

---

2. **Add Additional Details**

Now you can finish adding additional details to the rest of the tabs, such as Biographical, Employer, Arrest/Judge, Charges, etc.

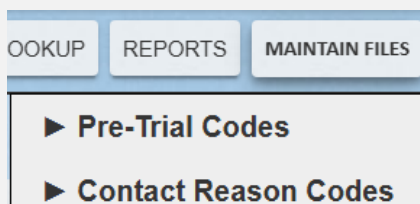| Dockets	Employer	Others Involved	Progress Notes	Cautions	Vehicles	Status / Details	Private Notes	Progress + Privat...	Military/Tribe
Jail Info	Conditions	Prescriptions	Appointments	Drug Tests	Images	Attachments	Tools	Alert Flags	Person Identifica...

As you fill out the record, **Save** frequently to avoid losing any entered information.

Reports

You can run reports by clicking **REPORTS → (Chosen Report)** in the upper right.
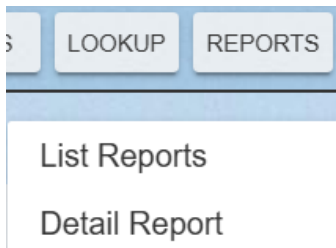
Some reports require you to select a record first and then click **Report** from that record's screen.

For more detailed information, see the rest of the manual for more details on each part of the process.

Quick Reference

Searching Existing Pretrial Records
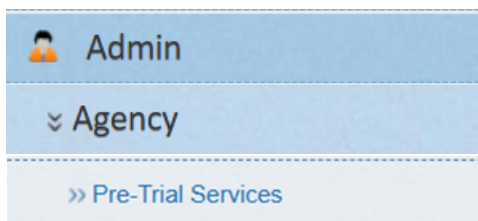
In order to open the Pretrial module, navigate to:

Admin → Agency → Pre-Trial Services

This will open the **Pre-Trial Services: Search (Main)** screen. This screen allows you to search pretrial records by the main records. If you want to search for charges or appointments instead, click **LOOKUP → Search Charges** or **Search Appointments** respectively in the upper right corner of the screen.
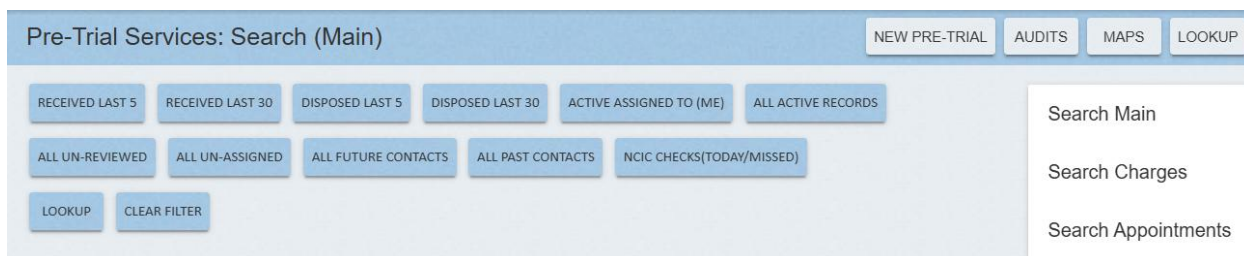
Search Main (Pre-Trial Records)

Use this to search complete pretrial records, which includes information on the person's entire record.
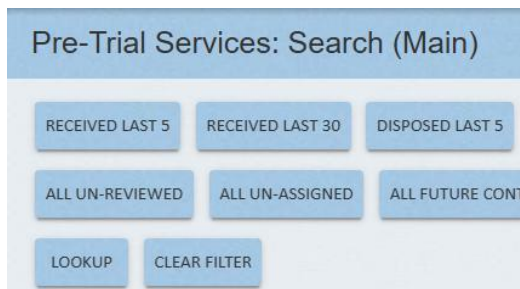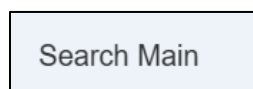
Search Charges / Search Appointments

Use this to search charge / appointment records. Searching here will bring you to the person's pretrial record related to the charge or appointment.
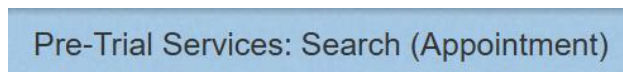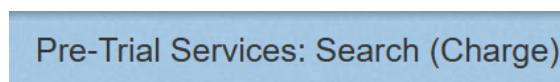
Searching the Main Pretrial Records

Opening the module or using **Lookup → Main** will open the **Pre-Trial Services: Search (Main)** screen. Here you can search and filter for different pretrial 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.

[RECEIVED LAST 5] [RECEIVED LAST 30] [DISPOSED LAST 5] [DISPOSED LAST 30]

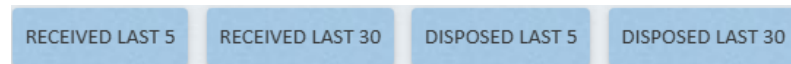These buttons will show you records from the past 5 or 30 days, respectively. **Received Last 5** and **Received Last 30** relate to the received date logged in the record, while **Disposed Last 5** and **Disposed Last 30** relate to the date when the record is disposed.
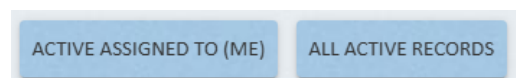
[ACTIVE ASSIGNED TO (ME)] [ALL ACTIVE RECORDS]

Use **Active Assigned to Me** to find records you have been assigned, while you can use **All Active Records** to simply view every active pretrial record.

[ALL UN-REVIEWED] [ALL UN-ASSIGNED]

Use these buttons to find records that have things left to do in iSOMS: **All Un-Reviewed** shows every unreviewed (status = *Waiting for Judge Review*) record, while **All Un-Assigned** shows all records that haven't been assigned to anyone.

[ALL FUTURE CONTACTS] [ALL PAST CONTACTS]
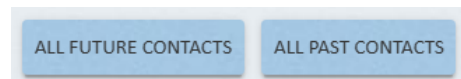
These buttons show you records related to information under the **Contact Tab** – either **All Future Contacts** or **All Past Contacts** can quickly be searched.

[NCIC CHECKS(TODAY/MISSED)]
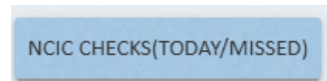
NCIC Checks (Today / Missed) shows records that need an NCIC check

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.

Lookup

Clear Filter

Selected Field Explanations

Case #:

Case # filters by the case number assigned by iSOMS or manually changed by your agency.

☐ All Agencies   ☐ Show Archived Only

If you have multiple agencies on your iSOMS server and you have permission to view them, use **All Agencies** to search all agencies available to you. **Show Archived Only** will only return records that have been archived.

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.

Pre-Trial Services: Search Results (Main)

Search Criteria ▶

Search Results

6 Records

	Received On	Case Number	Current Status	Eligible	Contact Level	Last Name	First Name	Middle Name	Post	Race	Sex	DOB	Assigned To
✏	07/15/2025 12:32	2025-00001	PENDING		CONTACT LEVEL 1	DOE	JAMES	RANDAL				01/01/2000	ELDER, MARTIN
✏	05/03/2021 08:59	2021-00003	WAITING FOR JUDGE REVIEW		CONTACT LEVEL 1					W	F	01/01/1965	ELDER, MARTIN
✏	05/31/2021 06:36	2021-00006	PENDING	YES	CONTACT LEVEL 2					W	F	01/01/1965	ELDER, MARTIN
✏	05/05/2021 09:16	2021-00004	WAITING FOR JUDGE REVIEW	YES	CONTACT LEVEL 1					W	F	01/01/1965	MCCLURE, JUSTIN
✏	05/06/2021 08:10	2021-00005	PENDING	YES	CONTACT LEVEL 1					W	M	01/01/1965	ELDER, MARTIN
✏	06/26/2024 17:25	2024-00001	PENDING		CONTACT LEVEL 1								

Searching the Charge Pretrial Records

Using **Lookup → Search Charges** will open the **Pre-Trial Services: Search (Charge)** screen. Here you can search and filter for different pretrial records by their associated charges. 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.

| ACTIVE ASSIGNED TO (ME) | ALL ACTIVE RECORDS |

Use **Active Assigned to Me** to find records you have been assigned, while you can use **All Active Records** to simply view every active pretrial record.

| COURT YESTERDAY | COURT TODAY | COURT TOMORROW | COURT NEXT 5 DAYS |

These buttons will show you records based on the court date entered in iSOMS. You can search based on **Court Yesterday, Court Today, Court Tomorrow,** or **Court Next 5 Days.**

Pretrial Guide

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

Failed to Appear will show people who failed to appear for court.

If you have multiple agencies on your iSOMS server and you have permission to view them, use **All Agencies** to search all agencies available to you. **Show Archived Only** will only return records that have been archived.

As mentioned above, when you have finished with your search parameters, click **Lookup** to perform your search. You will notice the charges listed on the right side of the screen. Double click on the desired entry to view, edit, or approve the record.

Searching the Appointment Pretrial Records

Using **Lookup → Search Appointments** will open the **Pre-Trial Services: Search (Appointment)** screen. Here you can search and filter for different pretrial records by their associated charges. You can either use the blue buttons to do *quick searches* or enter information in the fields to do *standard searches.*

Pre-Trial Services: Search (Appointment)

ACTIVE ASSIGNED TO (ME)	ALL ACTIVE RECORDS	APPOINTMENTS YESTERDAY	APPOINTMENTS TODAY	APPOINTMENTS TOMORROW	APPOINTMENTS NEXT 5 DAYS

Appointments From: 📅   Appointments Through: 📅

Appointment Type/Method: ▾   Appointment Reason: ▾

Last Name: First Name: Middle Name: City: ▾

Contact Level: ▾

Assigned To: ▾ 🔍

Status:
○ Active   ○ Disposed   ● Any Status

ApptStatus:
● Active   ○ Missed   ○ Any Status

☐ All Agencies   ☐ Show Archived Only

ALL	LOOKUP	CLEAR FILTER

Quick Searches

Several different quick searches are available by using the blue buttons.

ACTIVE ASSIGNED TO (ME)	ALL ACTIVE RECORDS

Use **Active Assigned to Me** to find records you have been assigned, while you can use **All Active Records** to simply view every active pretrial record.

APPOINTMENTS YESTERDAY	APPOINTMENTS TODAY	APPOINTMENTS TOMORROW	APPOINTMENTS NEXT 5 DAYS

These buttons will show you records based on the appointment dates entered in iSOMS. You can search based on **Appointments Yesterday, Appointments Today, Appointments Tomorrow,** or **Appointments Next 5 Days.**

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

Appointment Status can help you find active appointments, missed, or both.

If you have multiple agencies on your iSOMS server and you have permission to view them, use **All Agencies** to search all agencies available to you. **Show Archived Only** will only return records that have been archived.

As mentioned above, when you have finished with your search parameters, click **Lookup** to perform your search. This screen will show the records by appointment and related info. Double click on the desired entry to view, edit, or approve the record.

Adding Pretrial Records

To create a new pretrial record, click **New Pre-Trial** in the upper right corner of the *Pretrial* search screen:

You will be asked to confirm creating a new pretrial record.

Click **Yes.** This will bring you to the **Pre-Trial: 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 pretrial record. This will allow you to use information already present in iSOMS and link your pretrial report directly to the Master Name and jacket number.

If the person for pretrial already has a record in iSOMS, 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 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** in the iSOMS *Corrections Manual* for more information if you need it.)

Once you double click the row with the correct name, the Master Name will appear and fill in information for you. You can fill in additional information if needed. Click **"Save & Create Pre-Trial Record"** at the top of the screen to begin the pretrial record.

If you have not entered much information yet, you will get a data entry warning. But this will not happen if the Master Name has been sufficiently filled in before. In any case, the Master Name will fill in information on the newly created pretrial 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 person, address, contact notes, and so on.

2. The *tabs* record information about employers, arrest/judge, charges, assessments, attorney, 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 Pretrial Record.*

After you enter new details, make sure to click **Save** at the top of the screen.

Filling Out a Pretrial Record – Fields

This section explains in detail the different fields for a pretrial entry. The fields cover information such as address, contact info, assignment, contact/release level, current status, 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 *Maintain Files Entries* on page 24 for how to do this.)
>
> MAINTAIN FILES
>
> !

Fields

Case #:	Received On:		Time:
2025-00002	07/16/2025	📅	10:04:30

Case # is for the case number for this pretrial record. **Received On Date** and **Time** are for the date/time of the record. These fields automatically filled in but you can change them if so desired.

Received By:		Jacket #:
603 ELDER, MARTIN WILLIAM -INV	✕ ▾	116563

Received By is to note the officer who is recording this information for pretrial – this fills in by default with your name. **Jacket #** will also automatically be filled in.

Last Name:	First Name:	Middle Name:	Jr/Sr:	
DOE	JOHN	Q	SR ✕ ▾	(Age: 60/60)

Common/Business Name:

House #:	Street:		City:	State:	ZipCode:
101	Direction: MAIN STREET	Apt/Lot #:	MARYVILLE	TN ✕ ▾	37803 📖

Latitude:	Longitude:
35.6567552	-83.9955879

The next set of fields lists information about the person. Much of this will be filled in from the Master Name, but you can fill in more here if necessary.

County:	Home Phone:	Cell Phone:	Work Phone:	Email:
YOUR COUNTY ✕ ▾	865-111-1111	865-333-3333	865-222-2222	FAKEEMAIL@FAKESITE.COM

Text:
8655556789@MMS.ATT.NET   CELL CARRIER

These fields list the information on phone and email for the person. If you want to setup email-to-text, first type the phone number in **Text,** then press **Cell Carrier** to select their carrier. The carrier email path will automatically be added to the end of the phone number.

Text:
865-555-1234

CELL CARRIER

Text:
8655551234@MMS.ATT.NET

Assigned To:	Assigned On:	Time:
603 ELDER, MARTIN WILLIAM -INV ✕ ▾	🔍 07/16/2025	📅 00:00:00

Assigned To lists the officer or employee this pretrial record is assigned to and the date / time in **Assigned On.**

Contact/Release Level:
CONTACT LEVEL 1 ✕ ▾

Current Status:	Status Date:	Time:
PENDING ✕ ▾	07/16/2025 📅	10:19:04

Contact / Release Level lists which contact level the person is set to, such as *Level 1, 2,* or *3.* **Current Status** lists the status of the pretrial, including *Pending, Waiting for Judge Review,* or *Review Completed.*

If you would like to add an image of the person, you can click **Upload Image (☁) or Take New Photo (📷)** on the right. Select or take the image and it will be added.
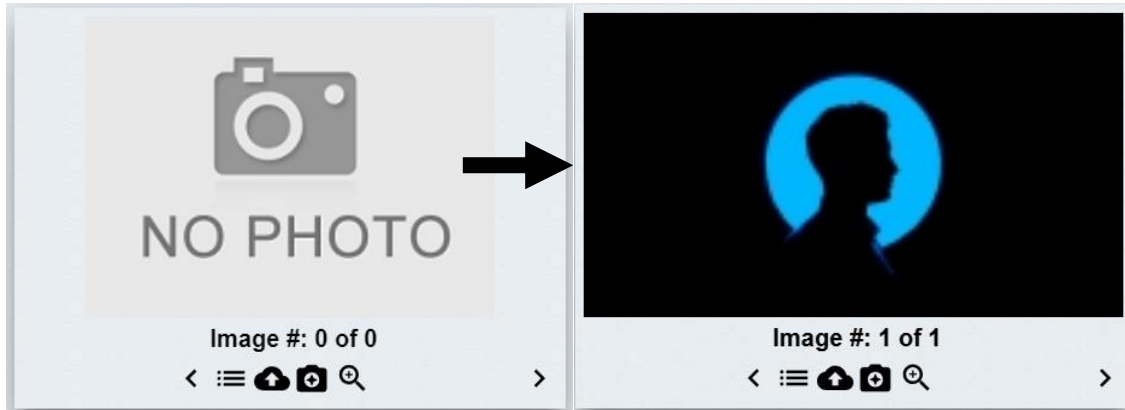
Make sure to **Save** at the top of the record as you go so you do not lose entered details.
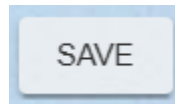
Maintain Files Entries

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 **Current Status** dropdown to have a new option, *Deferred.* Navigate to the *Pretrial* module under **Admin → Agency → Pre-Trial Services**, and then click**:**

Maintain Files → Pre-Trial Codes → Current Status
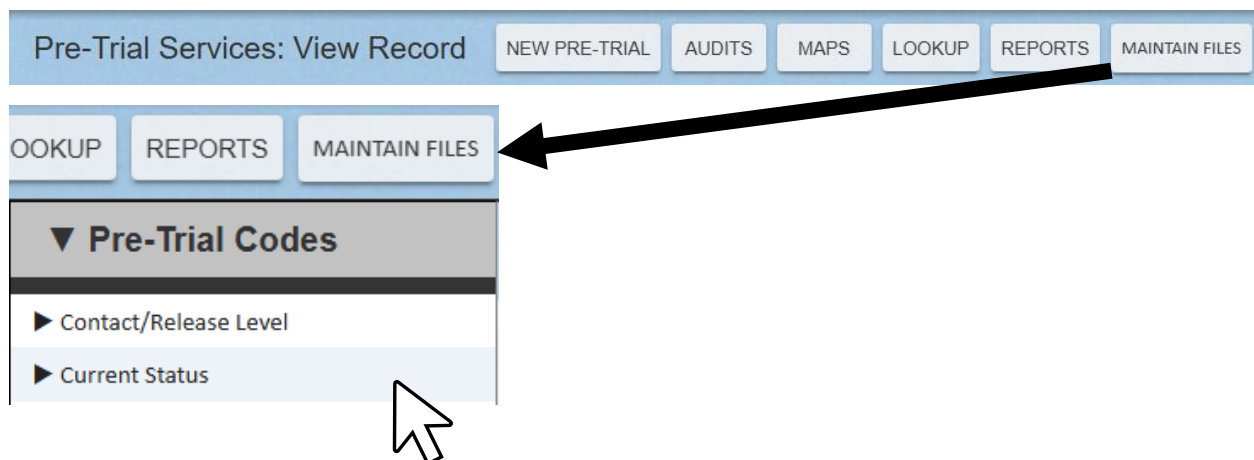
This will open the list of all the current codes for *Current Status.* If you want to edit a current code, find it in the list that appears and double-click it.

To add a new code, click **New Record:**

Code	NCIC	IBR	Description	Entry Date	Entry By	In-Active	Agency	System Code	
PENDING			PENDING	04/25/2021 14:15	ELDER, MARTIN		BCSO	NO	✎
REVIEW COMPLETED			REVIEW COMPLETED	04/25/2021 14:16	ELDER, MARTIN		BCSO	NO	✎
WAITING FOR JUDGE			WAITING FOR JUDGE REVIEW	04/25/2021 14:15	ELDER, MARTIN		BCSO	NO	✎

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.

Add Code

Code:
DEF

Description:
DEFERRED

ADD   CANCEL

Maintain All Codes: View Record

<< FIRST   < PRIOR   NEXT >   LAST >>

Code:
DEF   ☐ In-Active

Description:
DEFERRED

If we go back to the *Pretrial* records, we will see our new option in the **Current Status** dropdown:

Current Status:
DEFERRED   ✕   ▼

DEFERRED

PENDING

REVIEW COMPLETED

WAITING FOR JUDGE REVIEW

A Super User can follow this similar procedure to add additional codes for more options to almost any dropdown in the module.

Filling Out a Pretrial Record – Tabs

Summary

Fill out the tabs below the fields as needed.

The **Biographical** tab contains additional information on the identity of the person, such as description, IDs, military/tribe info, and more.

Employer is for recording information about the employer. **Arrest/Judge** records information on the person's arrest and the judge related to this pretrial.

Charges is a grid for charges the person is facing.

Assessment should be filled out to assess the person based on pretrial info.

| Biographical	Employer	Arrest/Judge	Charges	Assessment
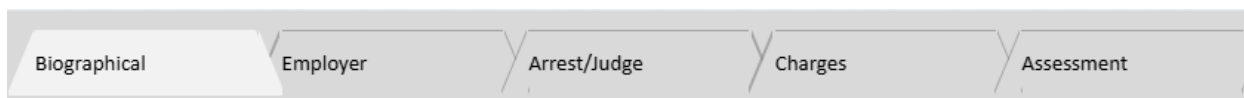
Score/Disposition is for information on classification / other scores and the disposition.

Public Defender and **Attorney** tabs let you record info on the person's public defender and/or attorney if they use one.

House Arrest / Monitor lets you record information on the person if they are under a house arrest or monitoring program.

Other Contacts can be used to add people related to the subject of this record.

If you are a Super User, **Expungement** lets you expunge this record and record who expunged it.

Score/Disposition	Public Defender	Attorney	House Arrest / Monitor	Other Contacts	Expungement
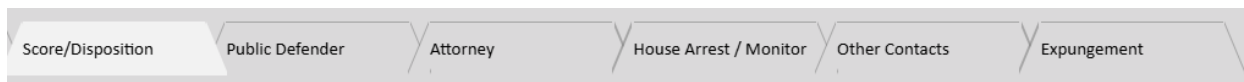
Notes is used to take notes, like most other notes tabs in iSOMS, but this one also auto-records some information from other tabs.

Program Conditions can be used to record conditions for the pretrial program.

Use **Contacts** to record the history of contacting the individual and their response or failure to respond.

Appointments are for any appointments the person must attend as part of their pretrial.

Notes	Program Conditions	Contacts	Appointments

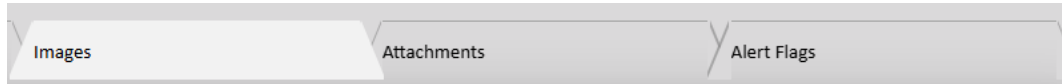**Images**, and **Attachments** tabs are available if you need to upload images and documents. (Images and Attachments in this module function similar to those in all of iSOMS, so if you are familiar with them, you do not need to read those sections.)
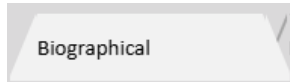
Alert Flags is to create warning messages when the record is opened.

| Images	Attachments	Alert Flags

Biographical Tab

| Biographical | |

The **Biographical** tab records information such as SSN, DOB, identifying info, ID #'s, and military / tribe information. If using an existing Master Name, some of this information will load in from the Master Name file. Make sure to **Save** after filling out the tab.

Social Security #:	Date of Birth:						
123-45-6789	01/01/1965	**(Age: 60/60)**					

Race:		Sex:		Height:	Weight:	Hair Color:		Eye Color:
WHITE	X ▾	MALE	X ▾	510	250	BLACK	X ▾	BLACK	X ▾

Build:		Complexion:	
AVERAGE	X ▾	LIGHT	X ▾

DL State:	Driver License #:	Class:	Expiration Date:	Status:	Restrictions:	☐ CDL
TN X ▾	123456789		12/31/2020			

Military ID:	SID #:	FBI #:	ICE #:	DOC #:	Student ID:
	TN987655	123456789			

Miltiary Branch:	Military Rank:	Indian Tribe:
▾		▾

Tribal ID:

Employer Tab
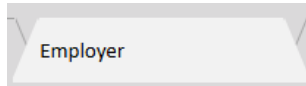
Employer

The **Employer** tab keeps information about the person's employment. If you already have the business in your records, simply type the name (such as **JOHN AND COMPANY**) 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 A, Business Records* on page 71.

Employer:
JOHN AND COMPANY   SEARCH   EDIT   ADD

Address 1: 101 MAIN STREET
Address 2:   **Apt/Suite #:**
City: MARYVILLE   **State:** TN   **Zip Code:** 37803
Phone: (865) 222-2222   **Email:**
Latitude: **Longitude:** 📍
Occupation:
BIRD WATCHING   Supervisor: Employment Length: Normal Hours:

You should also fill out some minor details about the position and employment history:
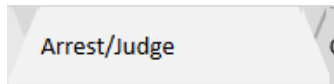
Occupation: Supervisor:

WORKER   **BOSS MAN**

Employment Length: Normal Hours:

2 years   **40**

Arrest / Judge Tab

The **Arrest / Judge** tab lists information on the arrest and the related judge to the arrest / pretrial.

Pretrial Outcome Type should be for the result of the pretrial, such as *New Criminal Arrest, New Violent Criminal Arrest,* or *Failed to Appear.*

If the outcome is *New Criminal Arrest* or *New Violent Criminal Arrest,* make sure to check the appropriate checkbox.

If the outcome is *Failed to Appear,* make sure to check the box at the top and bottom of the tab *and* to add a Failed to Appear Reason.

Continued on the next page

Arresting Department:		Primary Intake Reason:	
SPD	✕ ▾	BURGLARY	✕ ▾

Arrest Date:		Time:	Intake Date:		Time:	Appearance Date:		Time:
07/14/2025	📅	00:00:00	07/15/2025	📅	00:00:00	07/16/2025	📅	00:00:00

Use these fields to add information related to the arrest, including the **Arresting Department** and the **Primary Intake Reason**.

Judge:		SEARCH	EDIT	ADD
MR JUDGE AND JURY				

Address 1:

Address 2:   Apt/Suite #:

City: State: Zip Code:

Phone: Email:

Latitude: Longitude: 📍

Add the information on the **Judge** here. This uses the iSOMS Business system, but it isn't necessary to add address or other information as long as you have the judge name. If you don't have a particular judge in this record, simply press **ADD** and add the judge's name. The rest of the fields there are optional.
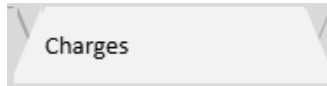
Charges Tab

The **Charges Tab** is where the charges related to this pretrial are entered. You will enter the charges and information related to each charge. x

Use the **Add Charge** button at the far right to add a 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.

| FIRST | << PREV | NEXT >> | LAST | **Entry Date: 07/16/2025 13:46** | | | |

| Charge Code: | | Bond | Fine | Cost |
| 14:70.4/FR ACCESS DEVICE FRAUD/FALSE PRETENSES/SWINDLE/CONFIDI ✕ ▾ **14:70.4/FR** | | 0 | 0 | 0 |

Charge Free Form:
YOU CHARGED A CHARGER IN THE WRONG OUTLET   ☐ Warning Only

| Charge/Statute Code: | Ordinance Code: | Charge Classification: | Title: | Section: | Paragraph: |
| 12345 | 12345 | A ✕ ▾ | 12345 | 12345 | 12345 |

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, Court History and more.

Additional Information on the Charges Tab

Multiple charges can be added. Click **Save** at the <u>bottom</u> 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.
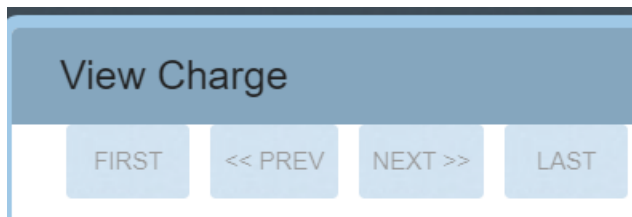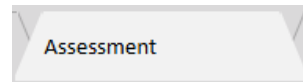

If you have trouble seeing everything on this screen, you should scroll down or zoom out in your browser settings on the right of your screen.

| Charge Detail | Court History | Disposition | Notes | Expungement |
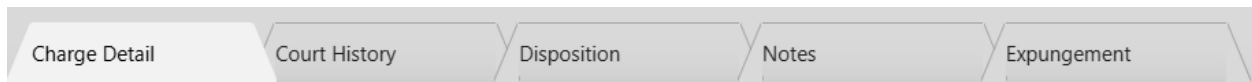
Assessment Tab

Assessment

The **Assessment** tab is for answering a series of questions about the person for classification and scoring purposes. These questions generally relate to the criminal history of the individual.

1. Age at current arrest:

22 or younger ✕ ▾

2. Current violent offense:

Current violent offense (no) ✕ ▾

2a. Current violent offense and 20 years old or younger:

Current violent offense and 20 years old or younger (no) ✕ ▾

3. Pending charge at the time of the arrest:

Pending Charge at time of arrest (YES) ✕ ▾

4. Prior misdemeanor conviction:

Prior misdemeanor conviction (YES) ✕ ▾

5. Prior felony conviction:

Prior felony conviction (no) ✕ ▾

5a. Prior conviction (misdemeanor or felony):

Prior conviction (misdemeanor or felony) (YES) ✕ ▾

6. Prior violent conviction:

Prior violent conviction 6a-(no) ✕ ▾

7. Prior failure to appear in the past 2 years:

Prior failure to appear in past 2 years 7a-(no) ✕ ▾

8. Prior failure to appear older than 2 years:

Prior failure to appear older than 2 years (YES) ✕ ▾

9. Prior sentence to incarceration:

Prior sentence to incarceration (no) ✕ ▾

Answer the questions and the scores in the **Score / Disposition** tab will automatically be set.

Score / Disposition Tab
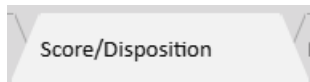
The **Score / Disposition** tab tells the scores from the assessment tab and also has fields related to the disposition and program status of the individual.

These scores will be automatically tabulated based on the checkboxes in **Arrest / Judge** and the answers in the **Assessment** tab.

If the individual is **Eligible for Program,** check this box and also go down and add the expected **Program State Date** and **Program End Date**. If the disposition is known, add that under **Final Disposition.**

Add the **Next NCIC Check Date** under this tab.

If there is an override related to this pretrial, add the **Overridden on Date** and **Override Reason** here.

Removed Date:		Removed Reason:		
07/01/2025	📅	MISSED SCHEDULED APPOINTMENTS	✕	▾

Removed By:			
603 ELDER, MARTIN WILLIAM -INV	✕	▾	🔍

If the person needs to be removed from the program, add the **Removed Date, Removed Reason,** and **Removed By** field information.

Public Defender Tab

The **Public Defender** tab keeps information about the person's public defender, if they have one. If you already have the public defender in your records, simply type the name (such as **JIMS LAW FIRM**) and that person will appear automatically. If you don't have the attorney in iSOMS or for more information on inputting new info like this into iSOMS for quick reference later, see *Appendix A, Business Records* on page 71.
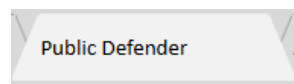
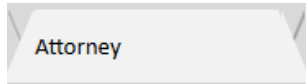First, check **Public Defender** if this person has one assigned to them, because this will allow this record to show up in searches and reports later. Then add the **Assigned On Date / Time** immediately and the **Disposition Date / Time** later (when disposed/dismissed/finished).

Afterwards, choose the public defender or add a new one to the records if necessary.

Attorney Tab

Attorney

The **Attorney** tab keeps information about the person's attorney. If you already have the attorney in your records, simply type the name (such as **JIMS LAW FIRM**) and that person will appear automatically. If you don't have the attorney in iSOMS or for more information on inputting new info like this into iSOMS for quick reference later, see *Appendix A, Business Records* on page 71.

Attorney:
JIMS LAW FIRM   SEARCH   EDIT   ADD

Address 1:
Address 2:   **Apt/Suite #:**
City: **State:**   **Zip Code:**
Phone: **Email:**
Latitude: **Longitude:**

House Arrest / Monitor Tab

House Arrest / Monitor

The **House Arrest / Monitor** tab is used to keep track of house arrest information, such as last visit date, electric monitoring, if the subject has moved, etc.

If the person is under house arrest or has electronic monitoring, mark the **House Arrest** or **Electronic Monitoring** box as appropriate.

Electronic ID:	Monitor Start Date:	Time:	Monitor End Date:	Time:
12345	07/17/2025	00:00:00	07/24/2025	00:00:00

These fields relate to the electronic monitor. Add the **Electronic ID, Monitor Start Date / Time,** and **Monitor End Date / Time.**

✓ Moved To New Address	Notified Date:	Time:	Actual Moved Date:	Time:
	07/14/2025	00:00:00	07/17/2025	00:00:00

If the person moves to a different address while under house arrest or monitoring, then check **Moved to New Address** and the notification date in **Notified Date.** Once they have moved, add **Actual Moved Date**.

Last Home Visit Date:	Time:	Next Home Visit Date:	Time:
07/18/2025	00:00:00	07/31/2025	00:00:00

Use these fields to track home visits: the **Last Home Visit Date** and the **Next Home Visit Date.**

| ✔ Absconded | ✔ Warrant Issued | Absconded Date:
07/18/2025 | 📅 | Time:
00:00:00 | Warrant Number:
12345 |

If the person has fled from monitoring / house arrest, check **Absconded** and add the **Absconded Date / Time.** Then, once a warrant has been issued, check **Warrant Issued** and add the **Warrant Number.**

Others Contacts Tab

The **Others Contacts** tab lets you record any other individuals (besides the subject of pretrial) 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.
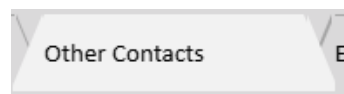
When you add a new entry, you should fill out only the tabs you need to fill out to track information and then save it. Details are provided for each of the sub-tabs below, although each sub-tab is relatively intuitive. Add information as needed.

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.

SEARCH PEOPLE

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

How Involved:
PROPERTY OWNER   ✕   ▼   Relationship: SCAN DL

First, fill in **How Involved** dropdown with how the person is connected to the individual.

How Involved:
PROPERTY OWNER   ✕   ▼

Add the **Relationship** this person has to the other people involved.

Relationship:
BROTHER

Now you can scan the person's driver license if you click **Scan DL**.

SCAN DL

☐ Hide Name on Report   ☐ Hide Details on Report   ☐ Safety Restraints Used

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:

Last Name: First Name:
DOE   JAMES   Middle Name: Jr/Sr: ▼

Nickname/AKA:

House #:   Street: City:
123   Direction: MADE UP ST   Apt/Lot #:   MURFREESBORO

State: ZipCode: County:
TN   ✕   ▼   55555   📍   RUTHERFORD

Home Phone: Email:
(865)-555-6789   Cell Phone: Work Phone: email@email.com

Headings

Below the main fields, the headings are available to type additional information about the person.

Biographical

Fill in the biographical information under this heading, including SS and DL numbers.

Employer

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 A, Business Records* on page 71 for more information.

Pretrial Guide

Juvenile / Child Info

Here you can fill out information on the individual if they were a juvenile / child.

Social Security #:	Date of Birth:		Person Type(forms):	Level Of Education:
123-45-6789	11/20/2010	(Age: 13)	CHILD	7 TH GRADE

School:
FORT CRAIG SCHOOL

Notes:
NOTES

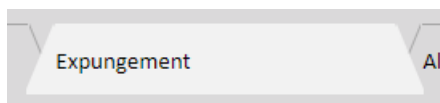Add the **Level of Education** and **School** along with any necessary **Notes**.

This completes filling out the *Others Contacts* entry. Click **Save** in the bottom right to finish this entry. If you have any more to add, simply repeat the process.

SAVE   DELETE   EXIT

Expungement Tab

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

Notes Tab

Progress Notes
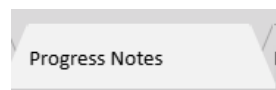
The **Notes** tab is for recording any information on the pretrial. Some entries will automatically be added here as you enter other pieces of information. You can add manual notes here as well.

To view or edit an entry, double-click it on the table. To add a new note, click **Add Note** in the upper right.
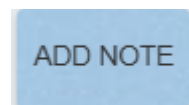
The **View Story** button will show all notes that have been added on one page.
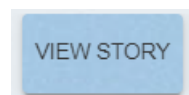
Program Conditions Tab
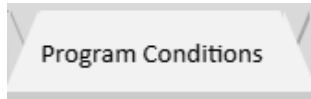
The **Program Conditions** tab is for recording the conditions of the pretrial in short entries or notes.

To view, edit, or delete a program condition note, simply double click it on the table. To add a new condition, click **Add Program Condition** and then add the condition and a note:
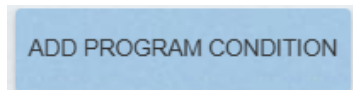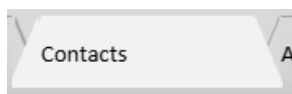
Contacts Tab

The **Contacts** tab is for recording officer and employee contact with the person in the pretrial program.

To view, edit, or delete a contact, simply double click it on the table. To print down the information, click the printer icon to print a form (such as Form Letter) with the contact log recorded. To add a new contact log, click **Add Contact Log** and then add the details:

Appointments Tab

Appointments

The **Appointments** tab is for logging information on appointments between officers/employees and the person on pretrial.

1 Appointment Log								EXPORT GRID TO FILE	ADD APPOINTMENT LOG
Appointment Date	Appointment By	Reason	Type/Method	Arrived On	Missed	Missed Reason			
07/17/2025 10:37		COURT PREP	AT COURT HOUSE	07/17/2025 00:00					

To view or edit an entry, double-click it on the table.

To text or email for a missed appointment, click one of the first two text/email buttons:

To text or email a reminder for an upcoming appointment, click one of the two second text/email buttons:

To add a new appointment, click **Add Appointment Log** in the upper right. Now fill in the reasons and add any additional notes.

ADD APPOINTMENT LOG

View Contact Log

Entry Date: 07/17/2025 10:37 / Entry By: EMPLOYEE

Appointment Date:
07/17/2025   Time:
10:37:52   Arrive/Completed Date:
07/17/2025   Time:
00:00:00   ☐ Cancel/Reschedule Appointment:

Appointment Type/Method:
AT COURT HOUSE   ✕   ▼   Appointment Reason:
COURT PREP   ✕   ▼

Missed Appointment Reason: ▼   ☐ Missed Appointment:

Notes:

Next Appointment Method: ▼   Next Appointment Reason: ▼

Next Appointment Date   🗓   Time: ☐ Make Appointment Record:

Contact Method: ▼   Contact Reason: ▼

Entry Date: 07/17/2025 10:37 / Entry By: EMPLOYEE

Appointment Date:
07/17/2025   Time:
10:37:52   Arrive/Completed Date:
07/17/2025   Time:
00:00:00   ☐ Cancel/Reschedule Appointment:

Appointment Type/Method:
AT COURT HOUSE   ✕   ▼   Appointment Reason:
COURT PREP   ✕   ▼

Missed Appointment Reason: ▼   ☐ Missed Appointment:

Add the details of the appointment, including the **Appointment Reason** or if missed, the **Missed Appointment Reason** and **Missed Appointment.**

Next Appointment Method: ▼   Next Appointment Reason: ▼

Next Appointment Date 📅   Time: _____   ☐ Make Appointment Record:

Contact Method: ▼   Contact Reason: ▼
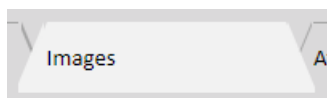
Contact Date 📅   Time: _____   ☐ Make Contact Record

SAVE   DELETE   EXIT

These fields are for recording another appointment or contact log. If you check **Make Appointment Record** or **Make Contact Record,** then those fields will be used to make a new entry under the appropriate tab.

Images Tab

Images	At

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.

DOWNLOAD ALL IMAGES	EXPORT GRID TO FILE	ADD IMAGE	ADD IMAGES

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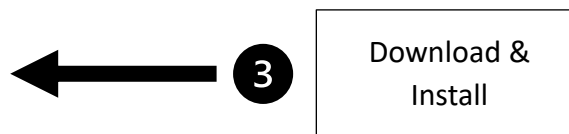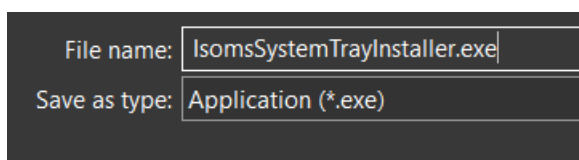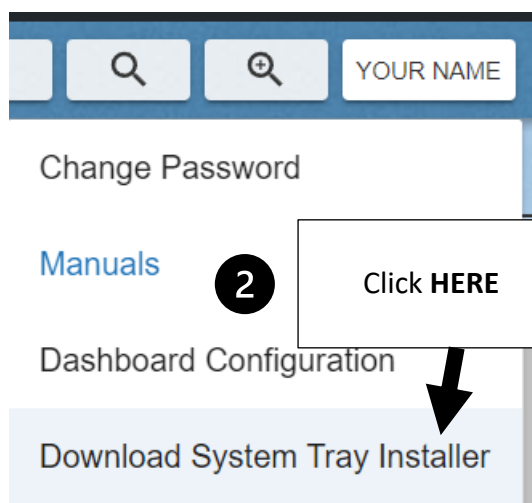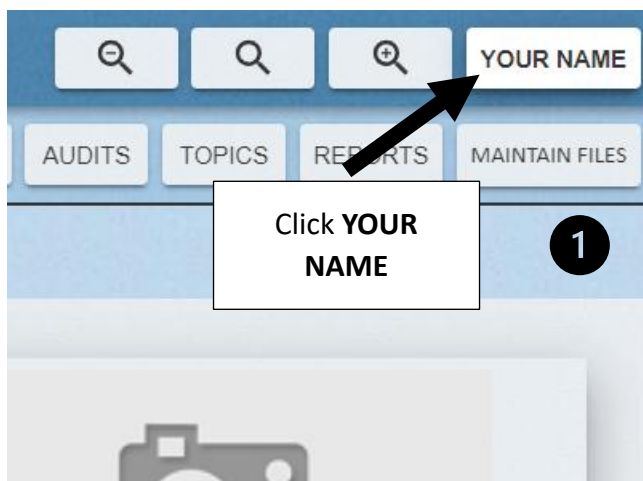
After you have the System Tray Installer on the computer, you can now use the **Add Images** button to upload multiple images at once if necessary.
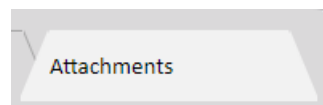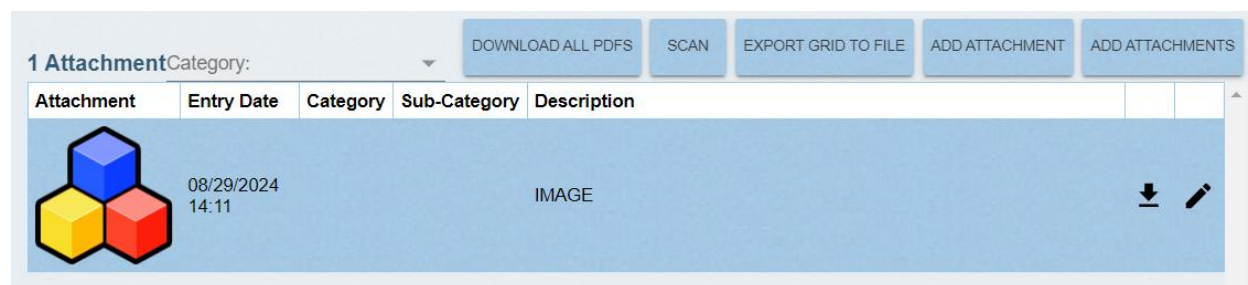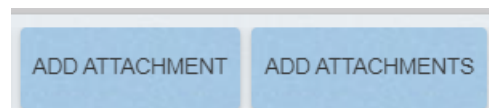
Attachments Tab

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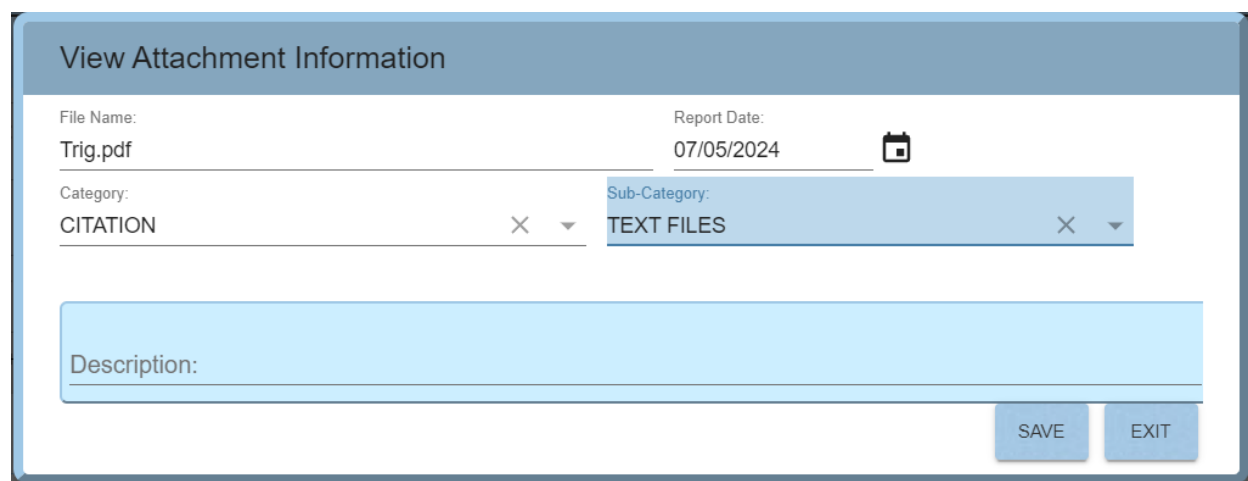
You can add a single attachment at a time or multiple attachments at a time. Just like above with images, you will need the System Tray Installer downloaded to the computer you are using to add multiple attachments at once. See the *Image* tab instructions on the previous few pages for instructions on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

Alert Flags Tab

Alert Flags

The **Alert Flags** tab is used to view or add alert flags that will create pop up warnings when anyone uses the jacket number that is connected to this pretrial 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.

1 Alert Flag   EXPORT GRID TO FILE   ADD ALERT FLAG

The Entry Date	Employee	Alert Reason	Agency	Contact Name	Contact Phone	Active Date	Expires On Date	Cleared Date
07/16/2024		FLIGHT RISK		JAMES DOE	865-555-1234	07/01/2024	07/31/2024	

Alert flags are notifications of critical information that will pop up whenever you open the pretrial record. They can be added directly under the **Alert Flags** tab.

You need to add alert flags to help others see important information as soon as they open the pretrial. 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 pretrial record, then whenever you open the pretrial record, the Alert Flag will appear. For example, if a pretrial record was marked with an alert flag for being a gang member, then when you open the pretrial record, you will see the alert immediately:

Flag Alerts

JAMES DOE
OPEN MASTER NAME

1 Flag

Entry Date	Employee	Reason	Agency	Name	Phone	Active Date	Expires On Date	Cleared Date	
07/11/2025	Shared Agency, - 603,	GANG MEMBER		GEORGE	865-555-1234	07/11/2025	07/14/2025		✏

NO PHOTO

* This color indicates an uncleared flag.

NEW   EXIT

Adding an Alert Flag

To add an alert flag, 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.

| Active Date: 📅 Time: |

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.**

| Expires On D… 📅 Time: |

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

| Contact Reason: |

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.

| Contact Agency: |
| Contact Name: |
| Contact Phone: |

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

| Cleared Date: 📅 Time: |

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.

1 Flag

Entry Date	Em
06/10/2024	WH

Details:
Gang Leader

Gang Leader

Pretrial Guide

Pretrial Reports

iSOMS allows you to print different types of reports for pretrial records:

- **List Reports**
- **Detail Reports**
- **Pretrial Statistics**
- **Charge Statistics**

- **Summary Statistics**
- **Docket Lists**
- **Form Reports**
- **Custom Reports**

To access the reports, begin on the iSOMS home screen and navigate to:

Admin → Agency → Pre-Trial Services
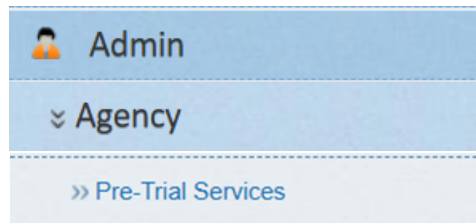
Now click on the **Reports** button in the upper right and choose the report you want to run. Some reports require you to choose a specific pretrial record first before you run them.
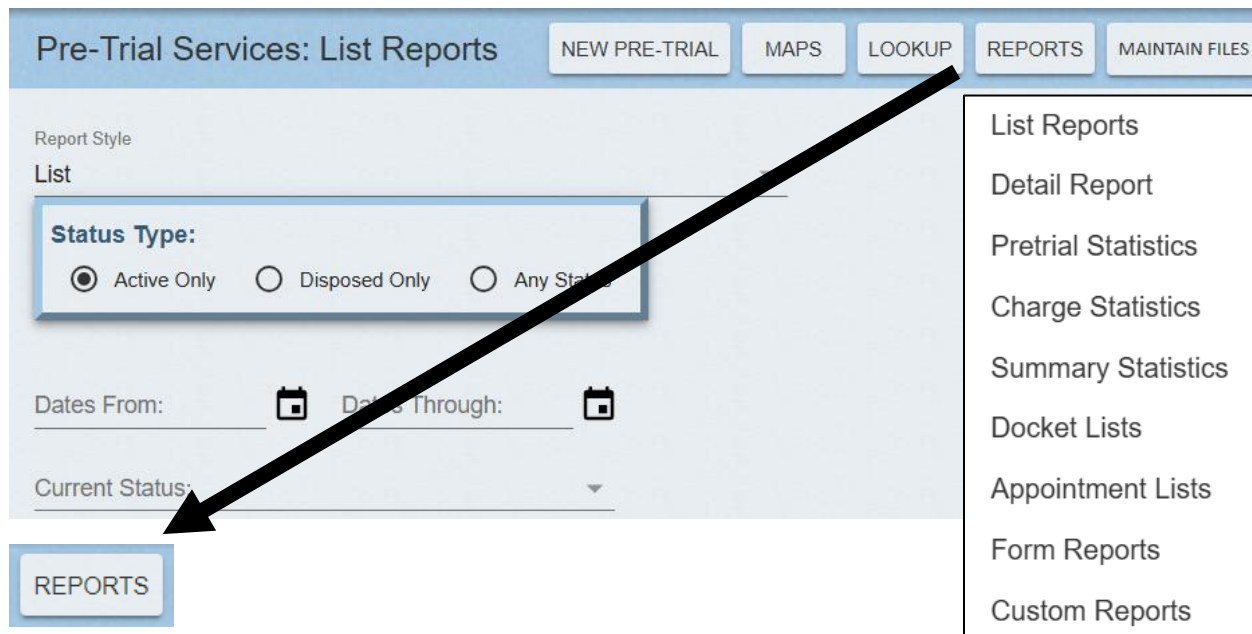
List Reports

The **List Reports** lists all pre-trial records over a certain date range. The *Report Style* field has options for sorting by a regular *List* or sort the list by information, such as *Contact Level, Assigned To, County of Residence,* etc.

You can also narrow the report using the filters. You can choose to hide or show *Address, Phone/Email, Arrest Info, Biographical, Program Info,* and *Program Summary.* Set your parameters for the report and click **View** or **Download** to view the report.

Pretrial Guide

List

Defendant	Received On	Contact Level	Score	Days
DOE, JAMES RANDAL	07/15/2025 12:32	CONTACT LEVEL 1	0	0
DOE, JOHN Q SR	07/16/2025 10:04	CONTACT LEVEL 1	0	0
	05/03/2021 08:59	CONTACT LEVEL 1	5	1510
	05/31/2021 06:36	CONTACT LEVEL 2	5	1512
	05/05/2021 09:16	CONTACT LEVEL 1	6	1527
	05/06/2021 08:10	CONTACT LEVEL 1	6	1533

Report Count: **6**

List by Funding Grant

Defendant	Received On	Contact Level	Score	Days
DOE, JAMES RANDAL	07/15/2025 12:32	CONTACT LEVEL 1	0	0

Funding Grant Count: **1**

PUBLIC SAFETY ASSESSMENT 2020

Defendant	Received On	Contact Level	Score	Days
DOE, JOHN Q SR	07/16/2025 10:04	CONTACT LEVEL 1	0	0
	05/31/2021 06:36	CONTACT LEVEL 2	5	1512
	05/05/2021 09:16	CONTACT LEVEL 1	6	1527

Funding Grant Count: **3**

PUBLIC SAFETY ASSESSMENT 2021

Defendant	Received On	Contact Level	Score	Days
	05/03/2021 08:59	CONTACT LEVEL 1	5	1510
	05/06/2021 08:10	CONTACT LEVEL 1	6	1533

Funding Grant Count: **2**

Report Count: **6**

Detail Reports

Detail Reports goes over a record in detail so you can view an information-complete report. You should set it to a specific record by finding the record you want to get the report for. Then you click the **Reports** button from that record. Choose what you would like to show on the report and then click **View** or **Download** to view the report.

Pre-Trial Services: Detail Report

☑ Include Score Info   ☑ Include Charges   ☑ Include Assessment   ☑ Include Conditions

☐ Include Notes   ☐ Include Contacts   ☐ Include Appointments

☐ Include Other Contacts   ☐ Include Images   ☐ Include Attachment Info

Report Format:

◉ PDF   ○ Excel   ○ XML   ○ SQL

[VIEW]   [DOWNLOAD]   [EMAIL]   [CLEAR FILTER]

YOUR AGENCY
Defendant Detail Report

Page   1   of   2

Defendant Detail

Case Number	Received On	Assigned On	Assigned To
2025-00002	07/16/2025 10:04	07/16/2025 00:00	ELDER, MARTIN

Contact Level

CONTACT LEVEL 1

Defendant: **DOE, JOHN Q SR**
Address: **101 MAIN STREET**
City/State: **MARYVILLE, TN 37803**
County:
Email: **FAKEEMAIL@FAKESITE.COM**
Text: **8655556789@MMS.ATT.NET**

Race/Sex: **W/M**	Hair/Eye: **BLK - BLK**	
Hgt/Wgt: **5 FT. 10 IN. - 250**	Date Of Birth: **01/01/1965**	Age: **60**
Home: **8651111111**	Work: **8652222222**	Cell#: **8653333333**
DI Number: **TN/123456789**	Tribal Id:	SSN#: **XXX-XX-6789**
Employer: **JOHN AND COMPANY**		

Assessment / Score Information

Outcome Type: **NEW CRIMINAL ARREST**	Arrest Date: **07/14/2025 00:00**
Arrest Agency: **SPD**	Appeared On: **07/16/2025 00:00**
Judge: **MR JUDGE AND JURY**	FTA Scaled: **4**
Program Start:	NCA Scaled: **4**
Program End:	NVCA Scaled: **2**
Overwitten:	Eligible:
Disposition:	

Pretrial Statistics Reports

Pretrial Statistics Reports report statistics for pretrial records over a date range. First, pick the *Report Style* you would like to run statistics on, including *Contact Level, Judge, Race, Gender,* and more.

Now add your date range, any filters, and then click **View** or **Download** to view the report.

Examples on the next page

Pretrial Guide

By Contact Level / Reviewing Judge

CONTACT LEVEL 1

Reviewing Judge	Count	% To Total
MR JUDGE AND JURY	1	50
	1	50

Contact Level Count: **2**

Report Count: **2**

By State / City

TENNESSEE

City	Count	% To Total
KNOX	1	50
MARYVILLE	1	50

City of Residence Count: **2**

Report Count: **2**

By Arresting Agency / Contact Level

Contact Level	Count	% To Total
CONTACT LEVEL 1	1	50

Contact Level Count: **1**

SPD

Contact Level	Count	% To Total
CONTACT LEVEL 1	1	50

Contact Level Count: **1**

Charge Statistics Reports

Charge Statistics Reports report charge-related statistics for pretrial records over a date range. First, pick the *Report Style* you would like to run statistics on, including *Charge Description, Charge Code, Contact Level,* and more.

Now add your date range, any filters, and then click **View** or **Download** to view the report.

Examples on the next page

Pretrial Guide

By Charge Description

Description	Male					Female					Count	% Total
	W	B	A	I	O	W	B	A	I	O		
ACCESS DEVICE FRAUD/FALSE PRETENSES/SWINDLE/ CONFIDENCE GAME	1	0	0	0	0	0	0	0	0	0	1	33.33
Not Specified	2	0	0	0	0	0	0	0	0	0	2	66.67
Totals: 3	0	0	0	0	0	0	0	0	0	3		

By Charge Code

Description	Male					Female					Count	% Total
	W	B	A	I	O	W	B	A	I	O		
14:70.4/FR	1	0	0	0	0	0	0	0	0	0	1	33.33
Not Specified	2	0	0	0	0	0	0	0	0	0	2	66.67
Totals: 3	0	0	0	0	0	0	0	0	0	3		

Summary Statistics Reports

Summary Statistics Reports report summary-related statistics for pretrial records over a date range. Add your date range and then click **View** or **Download** to view the report.

Report Style
Summary Stats ▼

Dates From:	Dates Through:
07/17/2025 📅	07/17/2025 📅

Report Format:

◉ PDF   ○ Excel   ○ XML   ○ SQL

VIEW	DOWNLOAD	EMAIL	CLEAR FILTER

YOUR AGENCY

Pretrial Services Summary Stats

Received Dates From 09/01/2024 Through 07/17/2025   Page   1   of   1

Description	Count		
Received for Review:	2	Average FTA Score:	**2**
Received and Eligible:	0	Average NCA Score:	**2**
Received and Not Eligible:	2	Average NVCA Score:	**1**
Received Charge Count:	3		
Started Program:	0		
Removed From Program:	0		
Completed Program:	0		
Daily County Rate:	72.00		

On Program Info	People	Days On Program	Savings
In County	1	320	23040.00
Out of County	3	960	69120.00
Totals:	**4**	**1280**	**92160.00**

Docket List Reports

Docket List Reports display information on the court date, charge, the court, and defendant name.

Add a date range, chosen filters, and what to include (such as *Address, Phone/Email, Arrest Info,* and more). Click **View** or **Download** to view the report.

Appointment List Reports

Appointment List Reports show the entries of appointments for all pretrial over a date range, including the reason for the appointment and any note on it. You can sort by date/time or by name. *Report Style* has options for a regular *List*, *Assigned To*, *Appointment Method*, and *Appointment Reason To*.

You must set a range of dates. You can choose to filter reason, type, contact level, assigned to, and location. You can choose what to include (such as *Address, Phone/Email, Arrest Info,* and more)*.* Now click **View** or **Download** to view the report.

Pre-Trial Services: Appointment Reports

Report Style
List

Sorting:
◉ Appointment Date/Time   ○ Last, First Name

Dates From:
07/17/2025

Dates Through:
07/17/2025

☐ Missed Appointments Only

Appointment Reason:

Appointment Type/Method:

Contact Level:

Assigned To:

City:

County:

☐ Include Address ☐ Include Phone/Email ☐ Include Arrest Info ☐ Include Biographical ☐ Include Program Info ☑ Include View Link

☐ Send Email/Text Message

Text/Email Message:

YOUR AGENCY
Pretrial Services - Appointments List
Appointment Dates From 01/01/2024 Through 07/17/2025   Page 1   of   1

Appointment On	Arrived On	Defendant Name	Appointment Reason	Missed
07/17/2025 10:37	07/17/2025 00:00	DOE, JOHN Q SR	COURT PREP	

Report Count: **1**

Form Reports

Form Reports fill in a letter from the information inputted into the iSOMS record. Open this report screen from the desired record, and choose the form letter, such as the *Pretrial Program Letter.*

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

Pre-Trial Services: Form Reports

Report Style
PRETRIAL_PROGRAM_LETTER ▼

Form for: PRE-TRIAL: JOHN DOE

Report Format:
⦿ PDF   ○ DOCX   ○ Excel   ○ XML   ○ SQL

| VIEW | DOWNLOAD | EMAIL | ATTACH TO CURRENT RECORD | CLEAR FILTER |

YOUR AGENCY
1905 HIGH PARK CIR
MARYVILLE, TN 37803
(865) 380-4600

DOE, JOHN Q SR
101 MAIN STREET
MARYVILLE, TN 37803

JOHN DOE

This letter is to advise you about your program requirements.

You start date of your Pretrial Release program is on .

You history has put you in a **CONTACT LEVEL 1** with this agency. (see image below for reference)

- Follow all court rules
- Do not get arrested again prior to your court date
- Advise if you have a change in Address, Any Phone Number, Email Address or Phone Provider.

Email Address: FAKEEMAIL@FAKESITE.COM

Cell Phone: (865) 333-3333

Home Phone: (865) 111-1111

Appendix A: Business 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 **Worked For** in *Service Work,* but it works for all businesses and organizations that have fields that look like this.
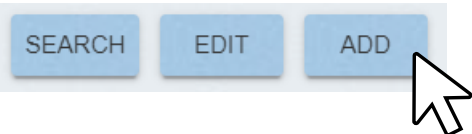
Worked For:
CHICK-FIL-A · SEARCH EDIT ADD

Address 1: 123 COW ST

Address 2:   **Apt/Suite #:**

City: KNOX   **State:**   **Zip Code:** 37772

Phone: (865) 555-5678   **Email:** CFA@CFA.COM

Latitude: **Longitude:** 📍

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 organization.

SEARCH EDIT ADD

Add Service Work Business

ID #:
0   Business License

Worked For: Short Name:
CHICKFILA   CFA

House #:   Street:
123   Direction: COW ST   Suite/Apt #:

City: State: ZIP Code:
KNOX   TN ✕ ▼   37772 📍 Latitude: Longitude: 🔍

Address 2:   Intersection:

Business Phone: Email:
865-555-5678   cfa@cfa.com

Contact Info

Notes:

ADD   EXIT

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.

1

ID #:

0   Business License

Service Work Business:

CHICK

Click the **Lookup** button near the bottom of the window in order to find existing records.

2

ALL   LOOKUP   CLEAR FILTER

Then scroll down the window and select the correct organization from the list by double-clicking their record.

3

1 Record

Business Name!	Address 1	City	State	Phone
CHICK-FIL-A	123 COW ST	KNOX		(865) 555-5678

For More Information

We hope this manual has been helpful to you and your agency.

If you have any questions, don't hesitate to call us at 888-644-5786.

First Revision, July 2025