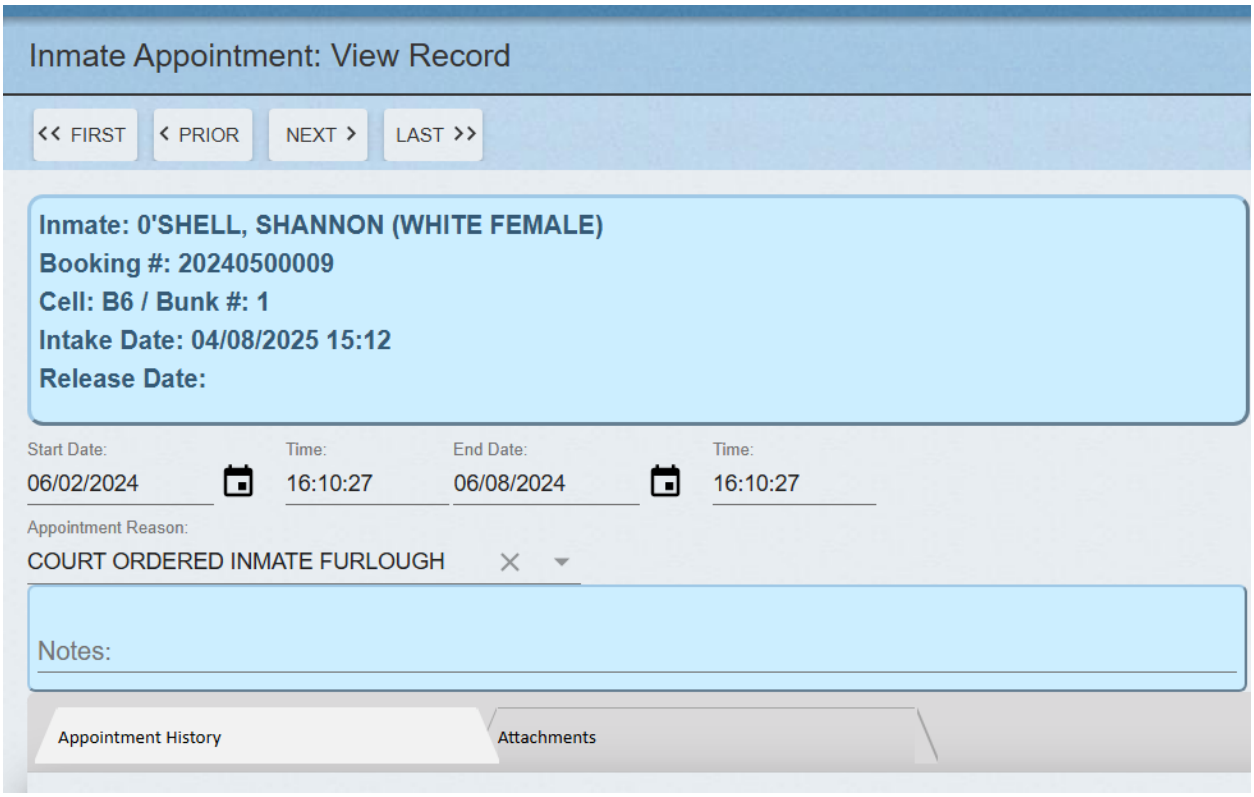
Appointment Log Guide

Appointment Log Overview

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 guide 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.

Appointment Log Guide

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Appointment Log Guide

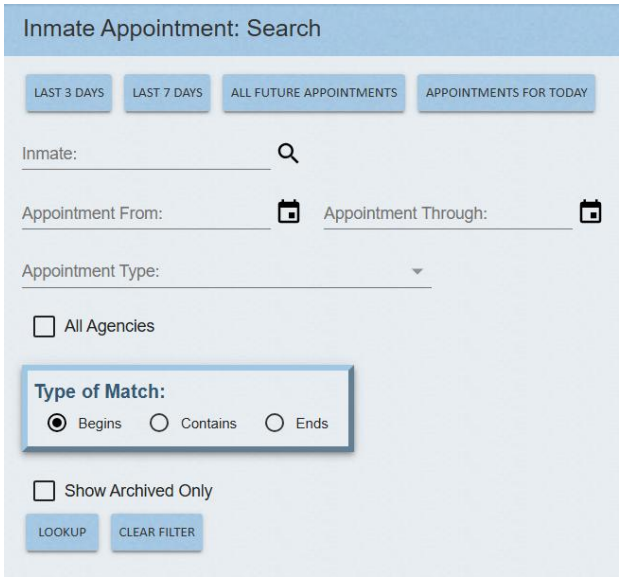
Searching for Existing Appointments

To search existing appointment records, begin on the iSOMS home screen.

Navigate to:

Corrections → Inmate Tracking → Appointment Log

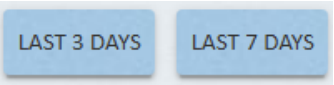
This will open the **Inmate Appointment: Search** screen. Here you can search and filter for different appointment records. You can either use the blue buttons to do *quick searches* or enter information in the fields to do *standard searches.*



Appointment Log Guide

Quick Searches

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



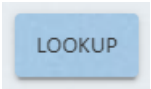
Last 3 Days and **Last 7 Days** will show you all the appointments in the specified recent time periods.

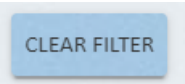
To see every upcoming appointment, simply click **All Future Appointments.** To see today's appointments for all inmates, click **Appointments for Today.**

Appointment Log Guide

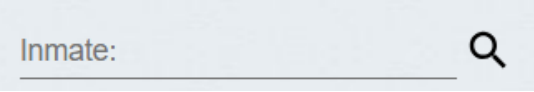
Standard Searches

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.

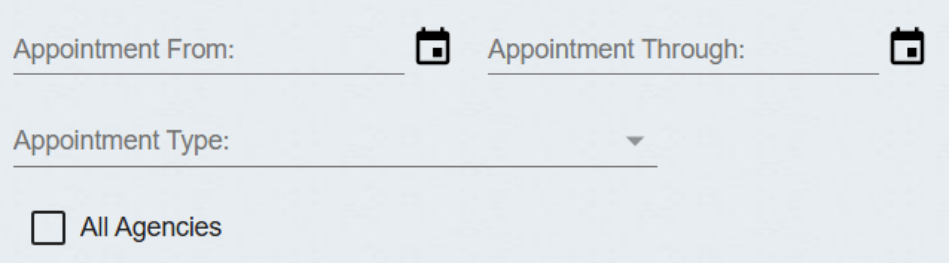




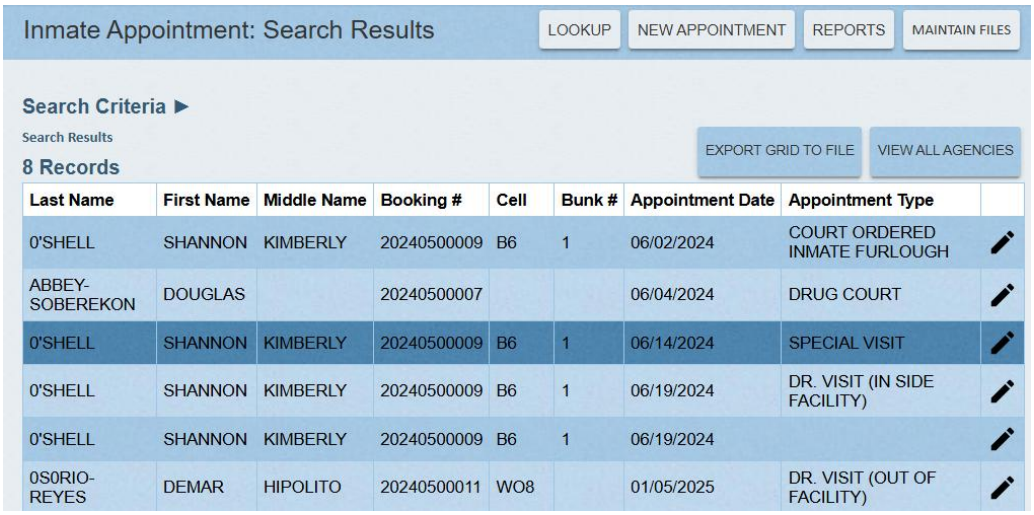
Field Explanations



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)

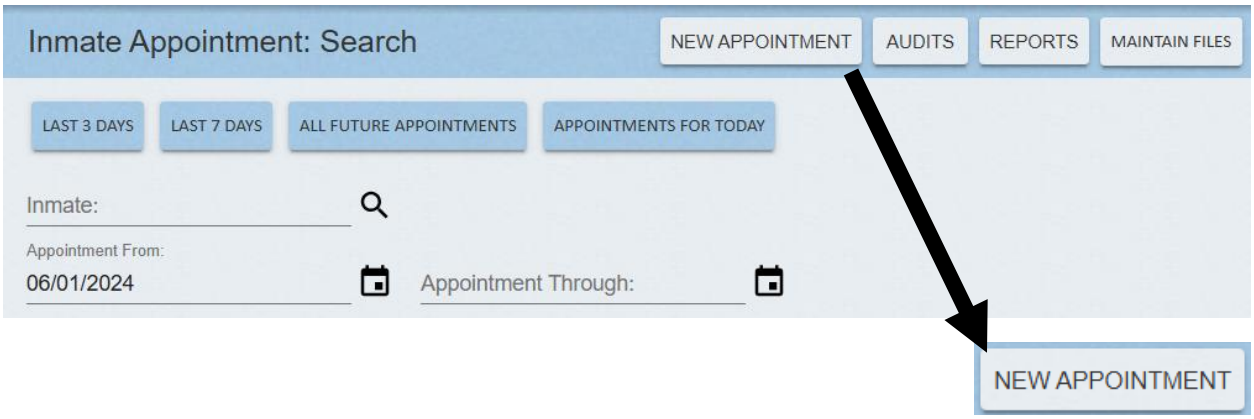
As mentioned above, when you have finished with your search parameters, click **Lookup** to perform your search. Double click on the desired entry to view, edit, or delete the record.

Appointment Log Guide

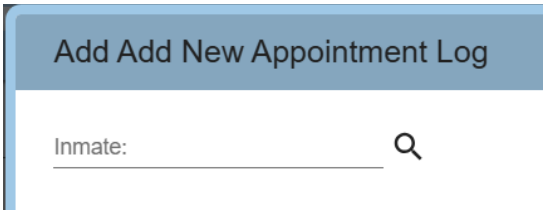
Creating a New Appointment Log Record

Typically, appointments are created on an inmate's booking record under the **Appointments** tab. See the *Corrections Manual* for more information.

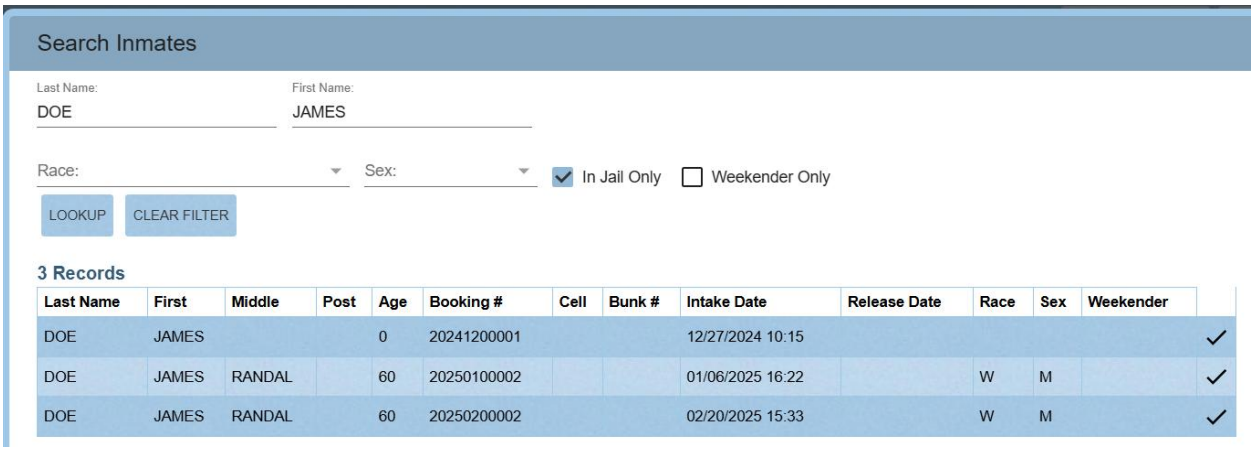
The **Appointment Log** module also allows you to create appointments here. Navigate to the search screen and click **New Appointment** in the upper right.



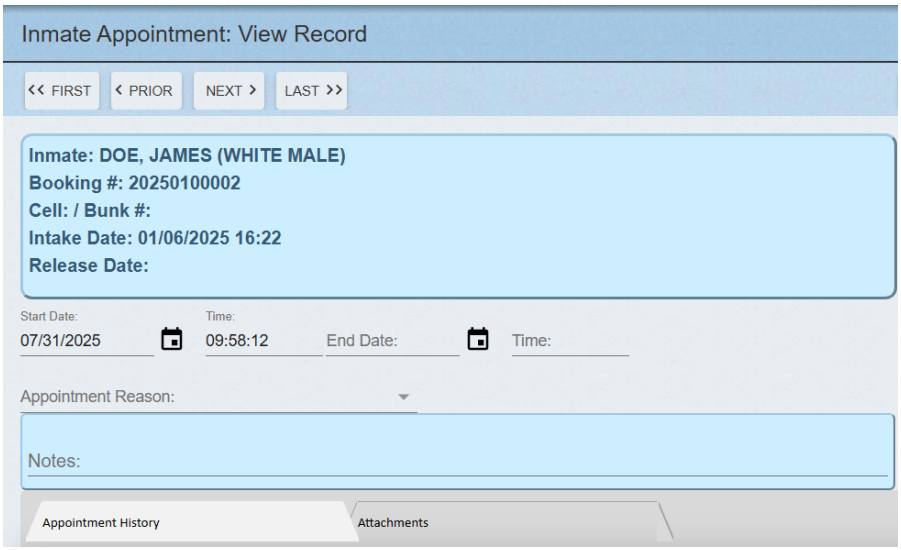
This will open a search box. Type the name of the inmate and a search box will open, or click the magnifying glass and you can find an inmate to add an appointment for.



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.

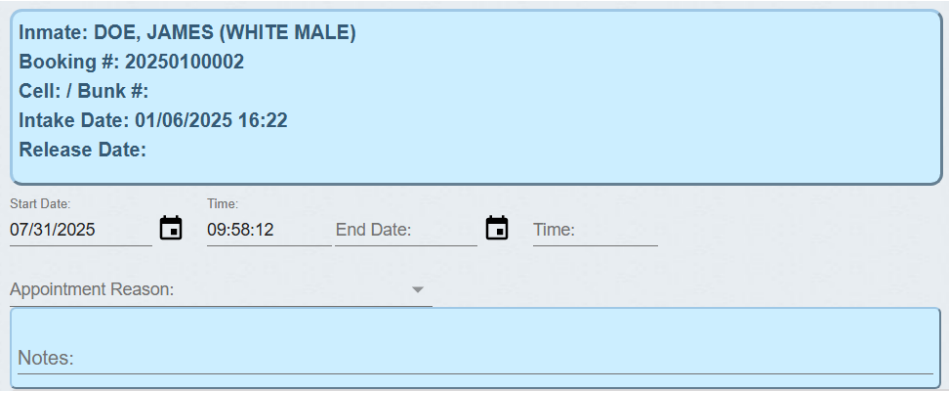


Appointment Log Guide

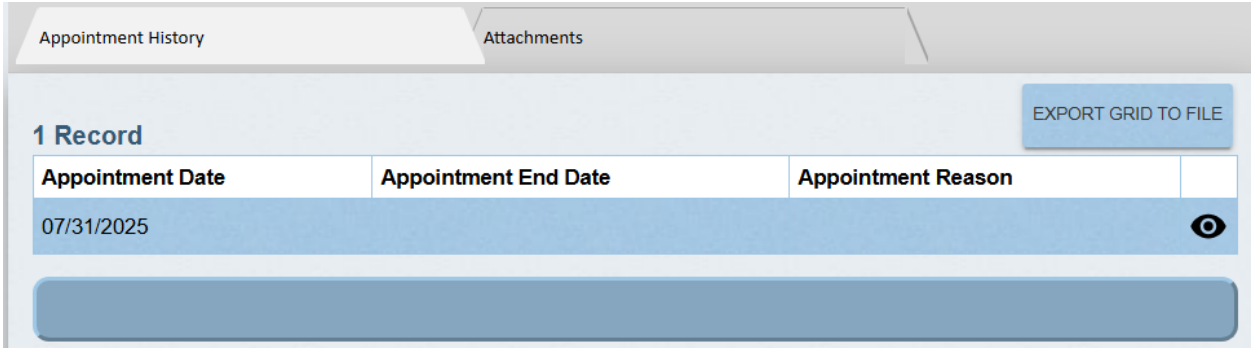


There are two primary sections of the report:

1. The *fields* in the upper part of the screen. These record details about the inmate, the appointment, and brief notes.

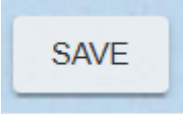


2. The *tabs* record information about other appointments and any attachments for this appointment.



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.*

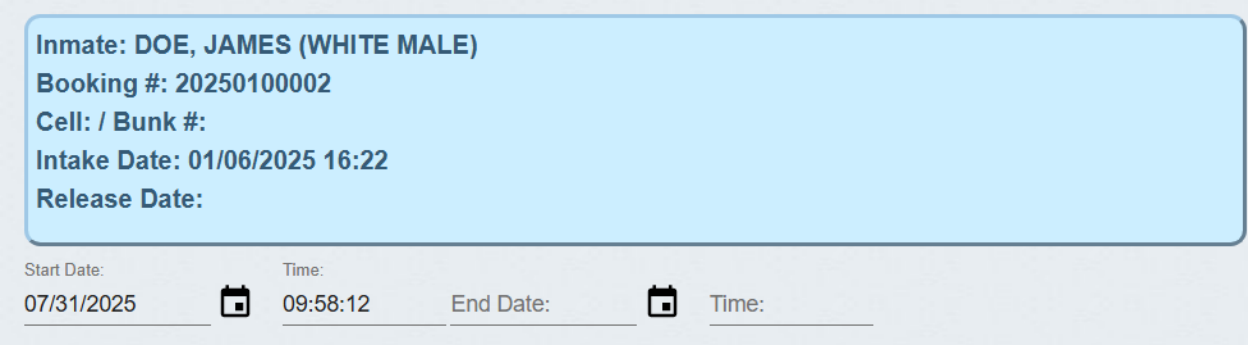
After you enter new details, make sure to click **Save** at the top of the screen.



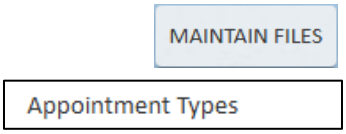
Filling Out an Appointment Record – Fields

This section explains in detail the different fields and tabs for an Appointment Log record. The top section of the record 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.

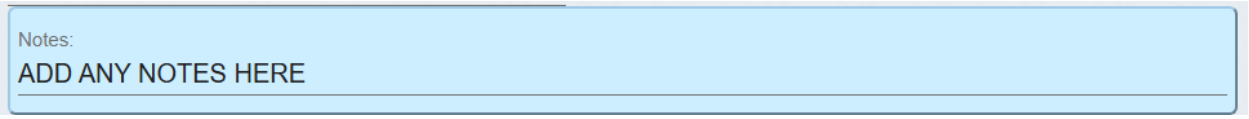
Fields



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 A: Maintain Files Entries* on page 20 for how to do this.)



Now you can add any additional notes here in the **Notes** box.

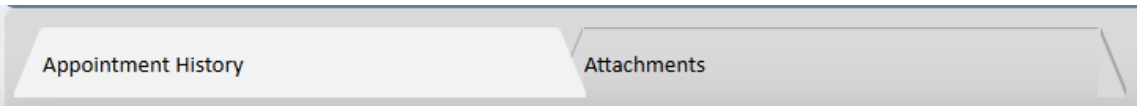
Filling Out an Appointment Record – Tabs

Summary

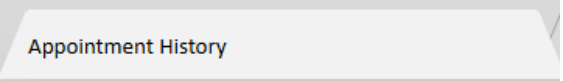
Usually, you don't have to add anything to the tabs for appointments, but the two available are shown below.

The **Appointment History** tab is a **read-only** tab and shows all other appointments for the inmate.

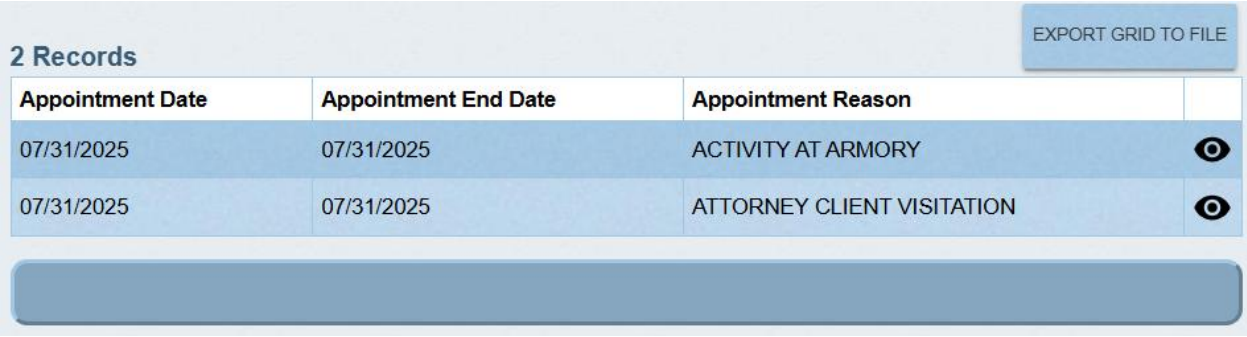
The **Attachments** tab allows you to attach files to this appointment record.



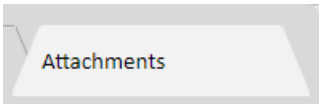
Appointment History Tab



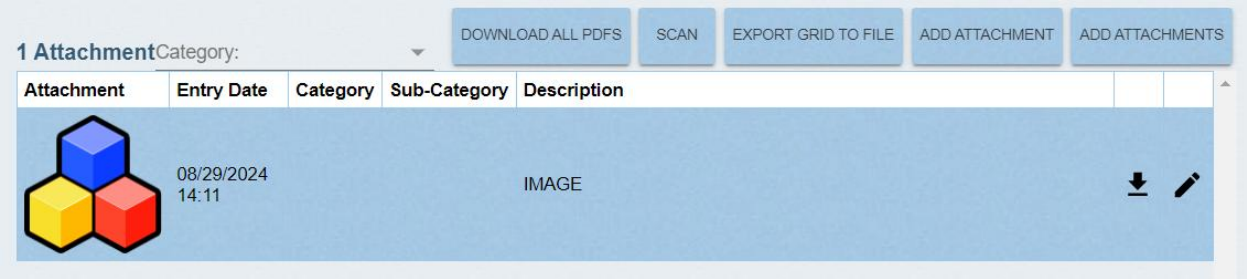
The **Appointment History** tab is a **read-only** tab. It shows a list of all other appointments the inmate has had or has coming up. If you want to open the appointment record, simply double-click it on the table or click the View Icon ( ) to open it.



Attachments Tab

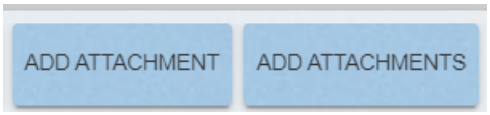


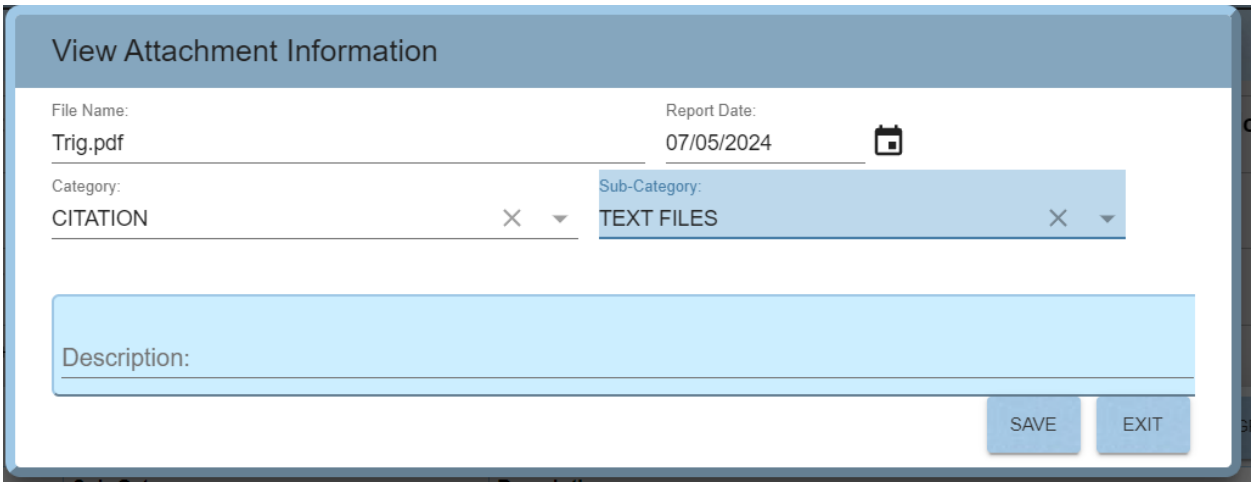
The **Attachments** tab is used to view, download, or add attachments. Double-click a file entry to view the record for the attachment or click on the icon to download the attachment to the computer.



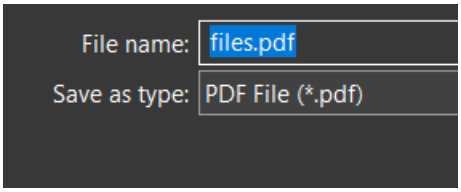
You can add a single attachment at a time or multiple attachments at a time. Just like above with images, you will need the System Tray Installer downloaded to the computer you are using to add multiple attachments at once. See the *Image* tab instructions on the previous few pages for instructions on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

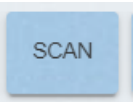


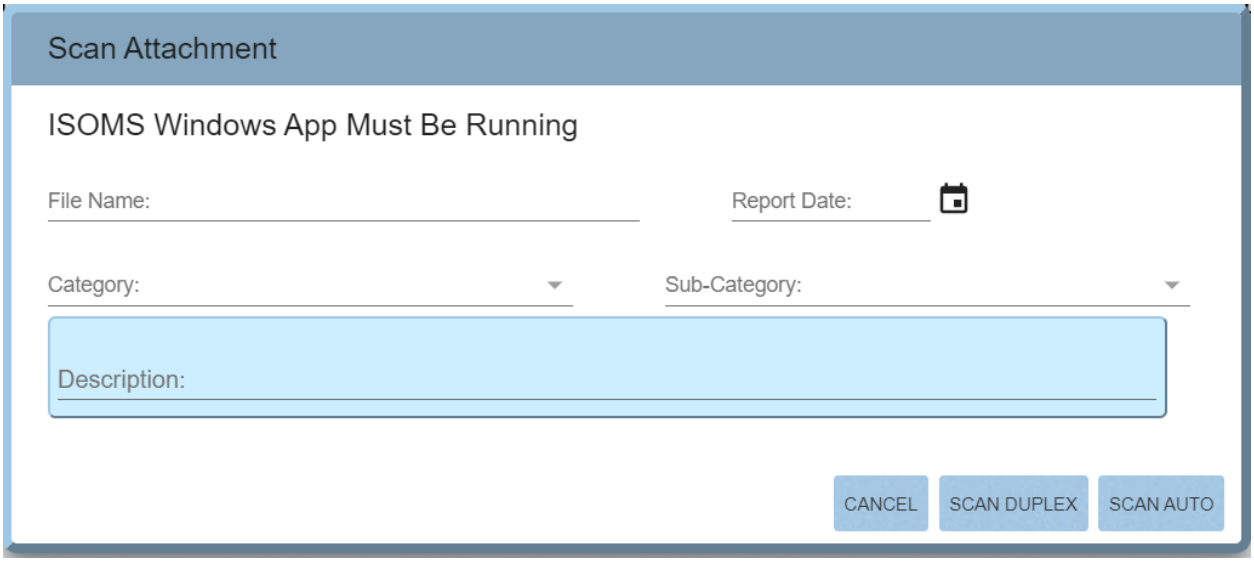


You can also **Download All PDFs** at once by clicking the appropriate button.



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

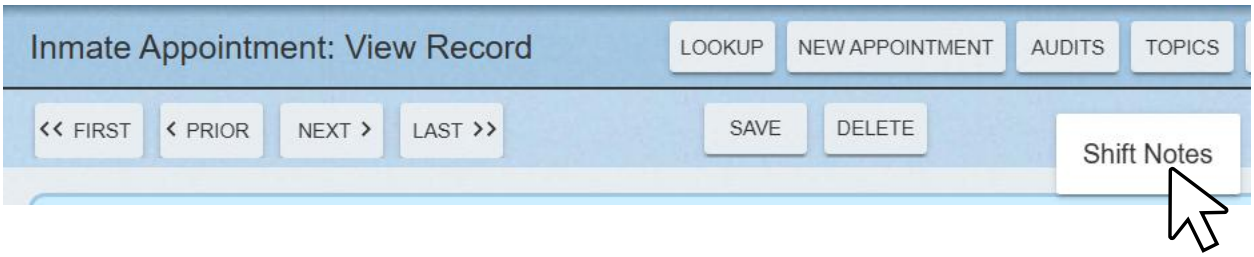




Appointment Log Topics

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* in the *Corrections Manual.*

Appointment Log Guide

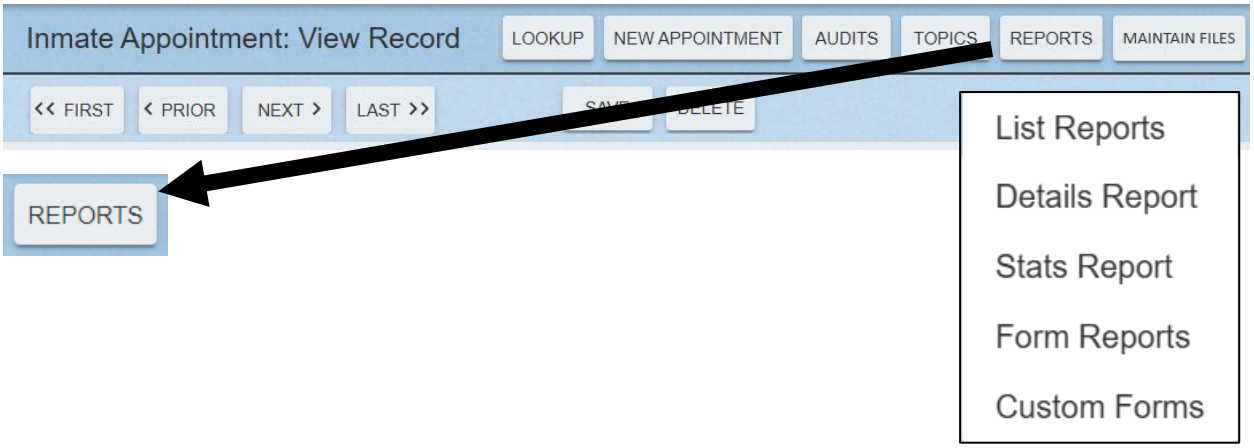
Appointment Log Reports

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:

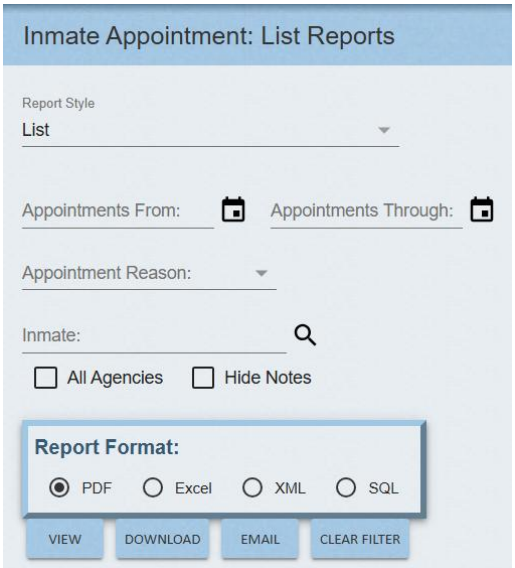
Corrections → Inmate Tracking → Appointment Log

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.



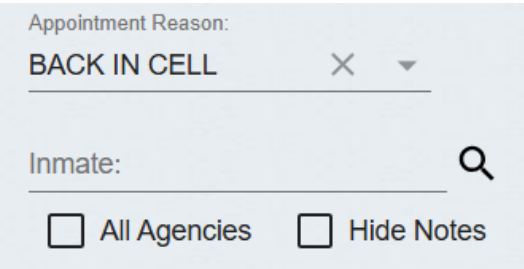
List Reports

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.**



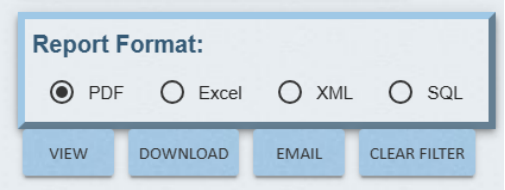
Report Style has some different layout and sorting options, such as *List, Group by Appointment Reason, List with Image,* and *Group by Appointment Reason with Image*. Pick the one most relevant to your desired result.

You can filter to one appointment reason or inmate, as well as hide notes on the appointment records if necessary.



Appointment Log Guide

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**

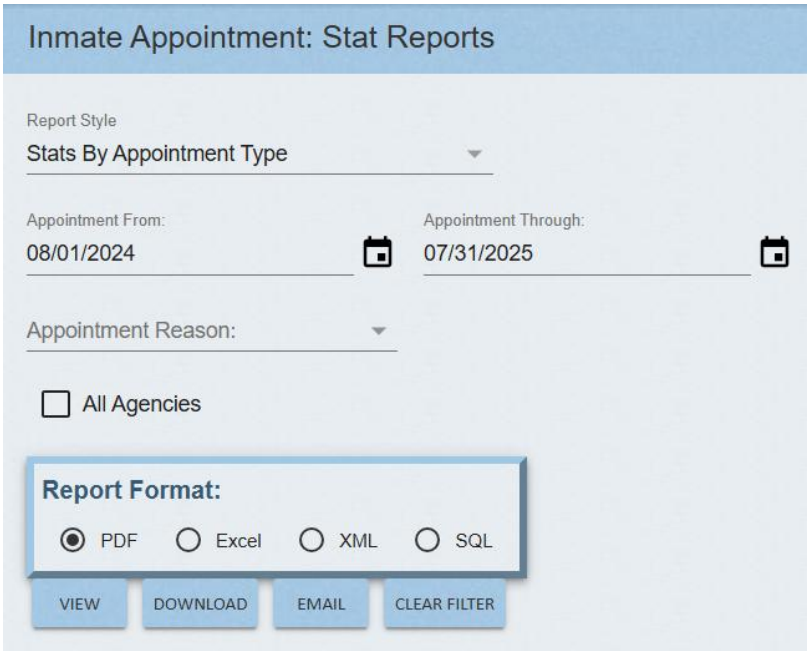
DR. VISIT (OUT OF FACILITY)

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-	_____	_____

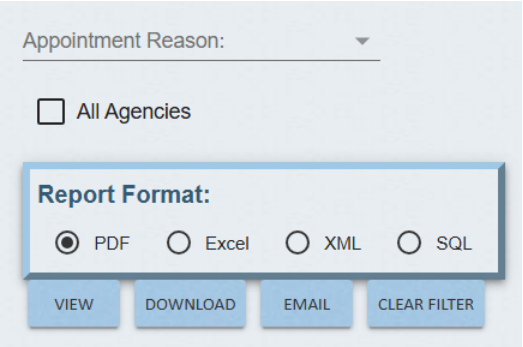
Sub Count: **2**

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**

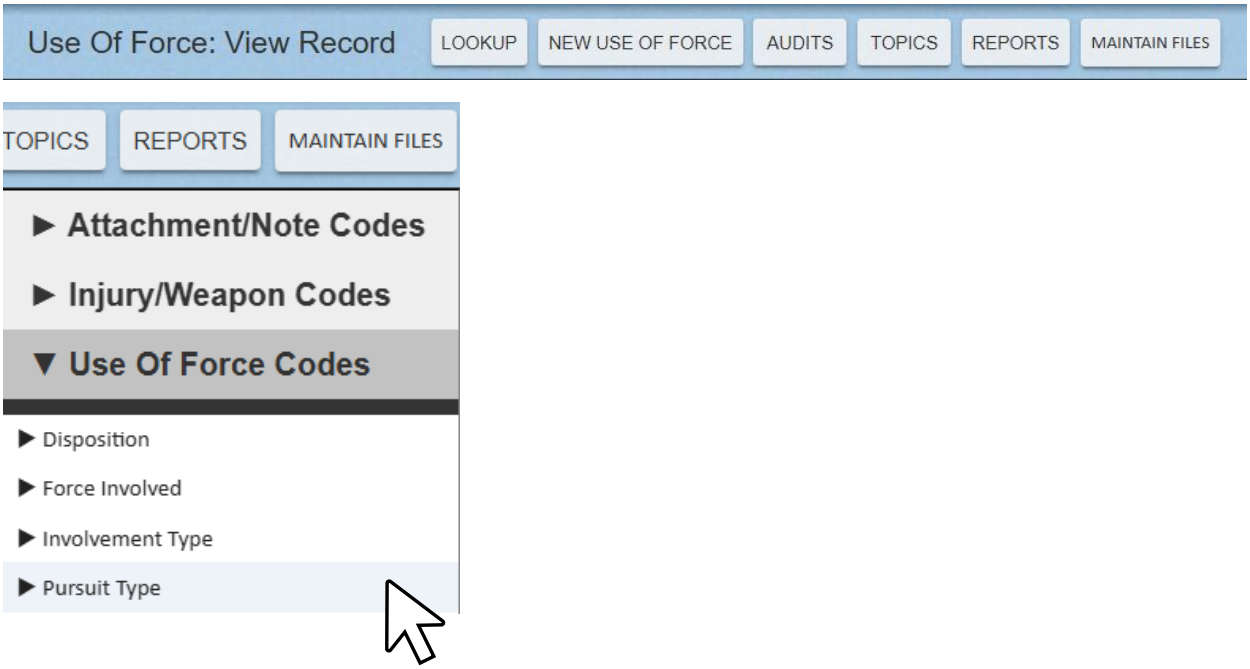
Appendix A: Maintain Files Entries

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.

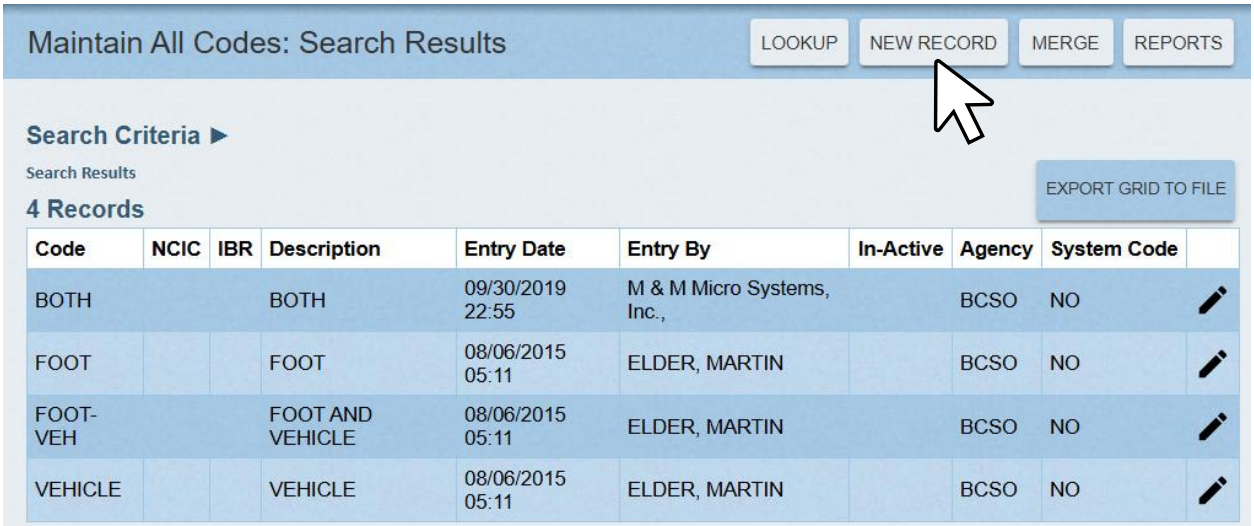
The method of adding codes (and the way to edit current codes) is to use Maintain Files. As an example, let's change the **Pursuit Type** dropdown to have a new option, *Horseback.* Navigate to the *Use of Force* module under **Corrections → Inmate Tracking → Use of Force**, and then click**:**

Maintain Files → Use of Force Codes → Pursuit Type



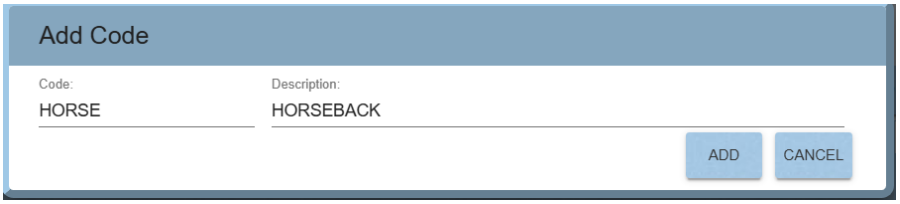
This will open the list of all the current codes for *Pursuit Type.* If you want to edit a current code, find it in the list that appears and double-click it.

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



Code	NCIC	IBR	Description	Entry Date	Entry By	In-Active	Agency	System Code	
BOTH			BOTH	09/30/2019 22:55	M & M Micro Systems, Inc.,		BCSO	NO	
FOOT			FOOT	08/06/2015 05:11	ELDER, MARTIN		BCSO	NO	
FOOT-VEH			FOOT AND VEHICLE	08/06/2015 05:11	ELDER, MARTIN		BCSO	NO	
VEHICLE			VEHICLE	08/06/2015 05:11	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.



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.

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

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