



Judicial Scheduling and Workflow Management System

Quick Reference



Softworks Support Information

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Legal

Scheduling an Appointment

- » Select "Scheduling" on the main menu.
- » Next, select the Division/Category that this appointment will be assigned to. Next, select the Judge, in the Resources selection list, for which you will create this appointment. * these are pulled down menus located above the monthly calendar viewer in the center of the Scheduling screen.
- » Next, select a date (in the calendar) that you would like to view the available schedule blocks for that Category/Division and Resource/Judge.
- » **Note: You can select a weekly date range by clicking on the [Week of >](#) on the left of the calendar, or a monthly range by clicking on the [Month Range](#) for the entire month.**
- » You will now see the available schedule blocks for that date or date range, displayed under the calendar selector.
- » To schedule an appointment, for a specific one of those blocks, click on the [Schedule](#) link to the left of the corresponding schedule date and time.
- » Next, the appointment screen will be displayed requesting the pertinent information required by the schedule administrator. **All required fields are indicated by a red asterisk next to the that field.**
- » After entering the information required for the appointment, click the Submit button.
- » Enter the case number, following the required format, indicated on the page, and click on the "Find" button.
- » Next, you will be required to confirm the appointment information submitted to the system. The next page will give you the ability to verify the information and confirm that the information is correct.
- » Next, click on the Confirm Appointment button, on the left of the page, to complete the appointment.
- » Read the disclaimer and click on the "OK" button to submit the appointment.

Note: The system will generate a confirmation number that corresponds to the appointment that you have just created, write this number down or print out the page for future reference. The system will also send a confirmation email to the scheduling parties.

Field Glossary

Case Information

Case Number - This is the name of the schedule, which will be displayed to the attorneys and other users creating appointments for the judge.

Motion/Petition Type - Hearing types defined for the selected schedule block.

Trial Type - Indicator for communicating whether it is a "Jury" or Non-Jury" trial.

Estimated Days - The number of days anticipated for the trial.

Avail. Appt Times - The available appointment times defined for the selected schedule block.

Defendant name - Name of defendant in the case.

Plaintiff Name - Name of plaintiff in the case.

Pre-Trial Date - This is the date in which this case is scheduled for pre-trial.

Trial Date - This is the date in which this case is scheduled for trial.

Scheduling Attorney Information

FL Bar # - The scheduling attorney's Florida issued bar number.

Name - The scheduling attorney's name.

Email - The scheduling attorney's email address. This will be used to send confirmation, and other notices regarding scheduling changes.

Opposing Attorney Information

Opp Bar # - Opposing attorney's Florida issued bar number

Opp Attorney Name - Opposing attorney's email address which be used to email the attorney the appointment confirmation.

Reason/Notes - Any special notes need to communicate to the court and opposing attorney

Submitting documents with JCourier™

- » Schedule an appointment as you would normally by selecting [Schedule Appointment](#) from the Main Menu.
- » After entering the case information, select the "[Media Upload](#)" tab on the upper right side of the scheduling details screen.
- Note: The heading should read "Document Filing"
- » Next, type into the "[Media Label](#)" box the description of the document you will be uploading.
- » Next, click on the "[Browse](#)" button. Then select the file to upload from you local machine or network.
- » Lastly, click on the "[Upload](#)" button.

This should take a second to transfer the file, then return back with the document listed below. You can submit as many documents as you wish, by repeating the steps above.

Note: The system will generate a confirmation number that corresponds to the appointment that you have just created, write this number down or print out the page for future reference. The system will also send a confirmation email to the scheduling parties.

Field Glossary

General Information

Media Label - Description of the documents provided through the system.

Canceling an Appointment

- » Select "[Case/Appointment Lookup](#)" on the main menu
- » Next, type in the Confirmation # of the appointment that you would like to cancel. If you do not have the Confirmation # you can look for the appointment in the appointment list viewer below the Confirmation # entry field and select it by clicking the [View](#) button.
- » Once you have selected the appointment in which you would like to cancel, you will be given a confirmation screen to verify that this is the correct information. Click on the "Cancel Appointment" button on the left of the page to cancel the appointment.

Note: You must acknowledge that you have notified all involved parties by clicking on the OK button when the Cancellation Notice appears.

- » Once you have clicked on the acknowledgment dialog, the appointment should show the status of "CANCELLED", please verify this prior to returning to other functions.

Note: The system will generate a confirmation number that corresponds to the appointment that you have just created, write this number down or print out the page for future reference. The system will also send a confirmation email to the scheduling parties.

Re-Issuing a confirmation email

- » Select "[Case/Appointment Lookup](#)" on the main menu
- » Next, type in the Confirmation # of the appointment that you would like to cancel. If you do not have the Confirmation # you can look for the appointment in the appointment list viewer below the Confirmation # entry field and select it by clicking the [View](#) button.
- » Once you have selected the appointment in which you would like to reissue another confirmation email, you will be given a confirmation screen to verify that this is the correct information. Click on the "Re-Issue Email" button on the left of the page to send another email.

Note: The system will generate a new confirmation email which is sent to all parties involved in the appointment.

Reports

Daily Calendar

- » Select "[Daily Calendar](#)" from the main menu.
- » You will now see a calendar representing the current month.
- » Select the date with which you would like to run the report.

Weekly Calendar

- » Select "[Weekly Calendar](#)" from the main menu.
- » You will now see a calendar representing the current month.
- » Next, Select the date with which you would like to start the report. Note: The report will run a week forward from that date selected.

Monthly Calendar

- » Select "[Monthly Calendar](#)" from the main menu.
- » You will now see a calendar representing the current month.
- » The Month Viewer will then load. You can change the month, and resource by selecting the desired information above the calendar.
- » Note: You can select an appointment, from this page, and the system will bring you to the details of that appointment, including all of the case information.

Note: To view the previous or next month on the calendar click on the ">>" or "<<" in the upper left and right hand corners.

Printing the appointments

To print the selected appointments, select "File" from the browser menu, then click on the "Print" option.

Creating schedule availability

- » Select "[Availability Setup](#)" on the main menu
- » Next, select the date in which you want to create an availability block from the date picker (calendar) on the left.
- » Next, click on the "New" button.
- » You will now see a message "Adding Schedule" above the Schedule Setup section (this indicates whether you're adding or changing availability).
- » First type in a Label for your availability block, this is the description of what the block represents.
- » Next, select the desired time interval.
- » After selecting the Interval, provide the number of appointments per availability block.
- » Next, type in the "Appointment Buffer" for this block. The Appt Buffer is the number of days that the block can be viewed prior to the day of the block.
- » Next, define whether the block is available to the public users by clicking on the checkbox next to "Publicly Available"
- » Check "Permit Scheduling" if you would like the public users to schedule appointments against this availability block. If not, the availability is displayed but does not allow scheduling on-line. This option is enabled by default.

Field Glossary

The following list defines the items contained in the schedule setup screen.

Label - This is the name of the schedule, which will be displayed to the attorneys and other users creating appointments for the judge.

Time Intervals - Time blocks for which the attorneys will schedule their appointments.

Max Entries - The number of appointments allowed for each "Time Interval" within the schedule block.

Padding - This represent the number of appointments allowed for overbooking.

Publicly Available - This checkbox is "unchecked" by default, it When checked, the schedule block will be available to the attorneys on the web.

Recurring Schedule - This checkbox creates this schedule block across a recurring timeframe. e.g. If you create a schedule block on a Friday, from 10:00AM to 11:00AM, and click on the "Recurring Schedule" checkbox, and select the "Weekly" occurrence then that schedule will appear every Friday from now on.

Occurrence - Is the occurrence for the recurring schedule.

Start Time and End Time - The beginning of the schedule block and the end of the scheduling block, respectively.