

BAIL BOND-NET JUMP START EXERCISES

**See access attachment before performing the following exercises*

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GENERAL NOTES

There is no need to use a mouse with BAIL BOND-NET. All group accesses use either the number keys (1 through 9) or the function keys alone (e.g. [F1] the F1 key only) or the function keys together with the [Ctl] or [Shift] or [Alt] key (e.g. [Alt][F1] hold down the Alt key then press the F1 key and release them together).

All data is written to a file directly after exiting the record accessed (usually with the Esc key). No need to worry about improper shutdown. The best place to be is at a menu in the program when the system is idle.

Data entry is not case sensitive; you can enter data in either upper or lower case. The system will convert the entry to upper case automatically. The delete and insert key can be used to modify an incorrect entry.

The bottom line on data input screens will display shortcut options for input.

BACKUP your system at the end of any day you performed data entry. Backing up your data and taking the latest backup off the premises is the best way to prevent data loss.

During electrical storms or brownouts keep your system turned off. Shutting your system down is the best way to protect your computer hardware from potentially damaging high voltage electrical exposure.

CLEAN your computer regularly. Turn the power off and disconnect the power cord then remove the cover and blow the dust out with canned air. Pay special attention to the power supply, blowing air through the fan and reciprocal slots across from the fan on the other side of the power supply housing.

Exercise 1: Adding your Agents to the data base

Turn your computer on and let the system BOOT UP. You'll know it has finished booting up when the SELECTION MENU appears on your screen. Several options will appear having a number associated with the option to the left of the option text. The option we will select for all of the exercises in this JUMP START instruction will be the one indicating TRAINING for BAIL BOND-NET.

The Operator code: ** prompt will appear . Respond by typing CC [Enter](this is a previously created managing employee code; in the working program module, your personal log on and code will be installed). The access code for CC is CODE [Enter]. Now the BAIL BOND-NET menu appears on the screen.

Four simple steps are required to install a new agent into the system.

First - tap the [F4] key (look at the bottom of your screen) then select SETUP GENERAL OPERATIONS, 17 (no enter) then select NEW EMPLOYEE SETUP, 12 (again do not enter). Now the following four entries must be made:

Employee code: ES (usually the employee's initials) [Enter]

Employee name: SAMPLE, EDWARD (last name first followed by comma and a space) [Enter]

Log-on code: CODE [Enter] (the code can be any combination of numbers and or letters).

Type [O-A]: A [Enter]

O-Office (management or managing agent having full access)

A-Agent (limited access)

The system will give you the opportunity to make changes. When the entry appears correct just hit [Enter] to return to the program menu.

Again tap the [F4] key, select 17 again then select AGENTS & ACCOUNTS, 14. Notice that the third option [F5] is add a NEW agent; tap [F5].

The system prompts you to type in Agent number: _____. Type in the number assigned to the agent by the State. DO NOT put in the company prefix. For our example the agent number is 015. Type in this number followed by [Enter].

The Agent no: 015 appears on the screen together with biographic information on the top part of the screen and fiscal year data on the lower section of the screen. First, tap the [F1] key to select the biographical data input option. Use the following input notes to guide you in your responses to the prompts. If you wish to back up to a previous data element use

your UP ARROW (left of key pad on the bottom).

<u>Data Element Prompt</u>	<u>Notes, Suggestions and Syntax</u>	<u>Sample Response</u>
SSN (Social Security No)	use only the nine (9) numbers no hyphens	123456789
Agent name	LAST, FIRST MI	sample, edward j.
Address	street or PO Box address	233 green avenue
City, ST ZIP	use state code	anywhere,
AR 72000		
Auth counties	optional for internal use only	N/A
Supervisor	name or title of supervisor if any	roger bondsman
Bonding Company	employer company	sample bonding inc
Date of Birth	mm/dd/yy	09/05/41
Title		agent
Lic-No	company license number	XX
Bus-phone		501-555-1234
Home-phone		501-555-4331
FAX		501-555-4428
Cell phone		501-555-5541
Employment	starting date (6 digits only)	011598
Terminated	do not use until terminated	
Commission %		40.00
Build up fund		5.00
BUF location	build up fund bank	central city bank
last report date	do not use (automatic function)	

When you have finished hit the [Esc] key twice to return to the menu.

Now tap [F4] then 19 then SET PERSONNEL ACCESS; 1C. Type in the employee identifier at the prompt. In this case ES [Enter] now the agent number is requested. Our example requires 015 [Enter] now select the level 1 access followed by [Enter] (see the manual for detailed explanation of access levels). The screen now displays the program menu.

Finally, select [F4] then 19 again and then MENU CREATION AND ASSIGNMENTS, 1A. Tap the letter A to assign menu to employee. Look at the employee just installed (ES) and make sure that his menu code is number 11. If it is not 11 tap the Modify employee menu designator, type in the employee code (ES) [Enter] then type 11 for the Menu and [Enter] then [Enter] twice to return to the menu.

Congratulations, you have just completed Exercise 1. What you learned here will be used throughout the program in other data entry modules.

Exercise 2: Customizing your Court Directory

From the BAIL BOND-NET menu select [3] COURTHOUSE LOOKUP. Now select [F1] Add a NEW Court Record.

First look at the bottom of the screen. Notice that the county can be selected by tapping the first two letters of the county name and/or by using the [Page up] or [Page down] keys. When the desired county appears on the screen hit [Enter].

Using the [Page up] or [Page down] keys select the court type then hit [Enter].

Now you can type in the court city or a personal identifier for the court if you prefer. For example, if the court was located in Fort Smith you could enter FORT SMITH or you may elect to use an abbreviation such as FS or FTSM etc.

The court name now appears on the screen as a composite of the first three items. You can modify the court name so that an abbreviation that might be objectionable on the reports will not appear in the court name text on your reports. e.g. SEBASTIAN MUNICIPAL FTSM might be changed to read SEBASTIAN MUNICIPAL FORT SMITH.

Now you can enter the court address, employee names and telephone numbers for your future reference. All of the remaining data fields are optional. However, the clerk names and phone numbers will appear on BAIL BOND-NET court appearance date reports.

The more complete the data is, the easier it will be to take full advantage of the system reporting attributes.

Once you have completed an entry you are prompted to:

[F1]-changes [F5]-file entry [F9]-delete entry [Esc]-abort

Select [F5] if you want to save the entry or [Esc] to abort. then hit [Esc] to return to the program menu.

Take a breather and next we'll tackle the heart of bonding; POWERS!

Exercise 3: Assigning Powers to your Agents

From the BAIL BOND-NET menu select [4]-ASSIGNMENT OF POWERS.

Now tap the [F1] key to ASSIGN powers to Agents.

Then type in the Agent number at the prompt (015 in our example) followed by [Enter].

Type in the number of the first power issued to the agent then [Enter] type in the number of the last power issued followed by [Enter].

If the first power number is 501 and you issue 25 powers, the last power number will be 525 not 526. Always check the first and last power number and the range of powers in between so as to avoid issue mistakes.

If one or more powers specified have been previously issued, the system will NOT double enter the power.

After entering the power numbers enter the date the power was issued. The default will be today's date.

So that the powers will be generated in the system, you must select the [Alt][F5] option CREATE powers now. [Esc] will abort the power creation process.

Now that we've covered some of the basics in Exercises 1 through 3, we're now ready to tackle bond activation in exciting Exercise 4.

Exercise 4: Activating an Assigned Power and data entry

The first item on the BAIL BOND-NET menu is BAILBOND DATA & REPORTING, the heart of the BAIL BOND-NET program. In this function you will learn how to activate powers, create bonds, enter a biographical and financial data with respect to the client and his indemnitors, and finally, how to search for client data by a host of search key options.

Let's get started. At the BAIL BOND-NET menu, select [1]. Notice that your screen displays [F3]- Issue a NEW bond. If you DO NOT assign powers before bond activation; that is, you issue the power at the time the bond is written, then this function will be your key to new bond creation. However, for our demonstration exercise we will assume that you issue powers in advance of the bond creating.

When a power is issued, the system creates a record of the power and maintains it as 'Not Activated' until such time as you either activate the power (create a bond) or void the power previously issued. In either case you will select [F5]-Recall EXISTING Bond to initiate the desired process. When an agent (level 1 access) accesses this module the [F3] option DOES NOT appear on the screen. Powers MUST be pre assigned to all personnel not having administrative (level 2) access.

Let us assume that we wish to activate power 501 for agent 015. Select [F5] and the cursor appears at the Agent no: _____ prompt. Type in the agent number, in this case 015 [Enter] now type in the power number, 501 [Enter]. Notice that on the right side of the screen 10 function key options appear. If the number of the agent and/or the power number is incorrect or the power was not issued to the designated agent, a warning will appear on the screen, and your attempt to access the power will be aborted.

The [F1]-Agent & Case option enables you to type in the court case number. This entry is optional and if the case is remanded to another court, the case number as well as the court name can be changed without consequence. Let's give it a try; select [F1] then enter a case number. For our example enter 3254C12. Notice that you can use any combination of letters and/or numbers. This type of entry is called ALPHANUMERIC DATA ENTRY.

Now, let's activate the power. Notice that the status on the third line at the center of the screen reports a 'Not activated' state. [Alt][F9]-mod(ify) STATUS allows you to scan through all of the possible status states. Hold down the [Alt] key and tap the [F9] key once; the status now changes to 'Void' do it again and the status changes to 'Active'.

Next, let's select [F2]-the DEFENDANT. all of the remaining incomplete data on the screen can be written using this function. The cursor now appears next to the Name of Defendant: prompt. Let's examine the entry possibilities for [F2] data.

The first data element is Name of Defendant. Type in the defendant's last name first, followed by comma then a space and the first name a space then the middle name or initial. A few examples follow:

**CRIMINAL, JOSEPH MATTHEW
CRIMINAL JR., JOSEPH MATTHEW
CRIMINAL-MARTINEZ, JOSE M.**

Never enter the first name followed by last name. So doing will make it difficult to search indices to locate your client. The same format should be used for all name data entry. Indemnitors, alias, spouse and other persons entered into the system should be formatted the same way.

After you have typed in the defendant's name hit [Enter]. The county name appears on the screen. Notice the bottom of the screen, as in Exercise 2, you can select the county by typing in the first two letters of the county name and/or use the [Page Up] or [Page Down] keys to select the county name. Again when finished, tap the [Enter] key.

The court type can now be selected using the [Page Up] or [Page Down] keys, again, when finished tap the [Enter] key. Now, as described in Exercise 2, enter the city in which the court is located or insert the abbreviated code you created.

The next item is the court date; the date the defendant must first appear in court. Use the six digit [MMDDYY] format. If you make an improper entry the system will reject the date, leaving the field blank. Use the up arrow to again select the item then type in the right date.

Next field is the charge. Type in the charges against the defendant. If you require more space for the charges, that space becomes available at the bottom of the [F3] screen.

The type charge, on the same line can be displayed using the [Page Up] or [Page Down] key followed by [Enter]. The only available choices are Misdemeanor and Felony.

Now type in the exact bail amount. Upon entry, the system will calculate the premium. The premium shown DOES NOT include State, County or Administrative fees; we'll get to all of that later. Make sure that you type in the decimal point appropriately. e.g. 5000.00.

Now you are prompted to type in the Date written. Use the MMDDYY format. This date is absolutely required and MUST be accurate.

Skip the termination date; this field is for exoneration and other dispositions only. It does, however, refer also to a voided date.

Completion of the alias data field can be handled one of two ways. If the alias is a first and last name it should be fashioned like all other system names; last name first syntax. If, on the other hand, the alias is simply a nick name, just type in the name (e.g. joey).

Following are examples of acceptable street addresses. The use of postal box numbers is not recommended; trying to physically locate someone at a postal box is highly unlikely.

e.g. 123 W. Main St. Apt 23c
Apple Gate Subdivision # 46

108-15 Carver St. NW
State Route 23 Box 187

The city ST(ate) and ZIP (code) can be written city followed by a comma and a space, then the two character state code, a space and finally the 5 or nine digit zip code.

e.g. Winston Salem, NC 25043

Salem, MA 16401-3345

Optionally, you may elect to locate the city state and zip in your Address-O-Matic records. Tap the [F1] key then type in the first letter of the city name. Follow the prompts to display more or select a city state and zip from the Address-O-Matic file or add to the file by selecting the [F7] key and then type in the city state and zip code. When complete the Address-O-Matic module will write your selection on the current city state zip code line.

We recommend that you type in the telephone number using the area code first for clarity reasons. e.g. 501-555-6789 870-555-6266 If the defendant has no phone you may indicate by using the [F7] optional shortcut to type the word 'none' in the data field.

The defendant's employer is free form and can include a company name and/or a supervisor's name. e.g. mason iron work inc. - joe mason. It may contain up to 32 characters.

The employer address consists of 32 characters and may contain the city state and zip together with a street address. The field is free form or can be used in conjunction with Address-O-Matic. If desired, use the [F1] key first, select the city state and zip then tap the [Ins] (insert) key and type a street address.

The above data entry features will be used throughout the data entry sections accessible using the option access function keys listed on the right side of the screen. As you complete the desired entries indicate completion by tapping the [Esc] key.

Notice the [F8]-Scan screens option. Selection of this option enables you to view all of the data in the bond data record. You can access any input screen by selecting the appropriate function key. If the associated screen is not in view, the system will change the screen contents and display the appropriate screen.

Note that selection of the [F3]-marks/remarks option permits free form entry of marks and scars. All of the words in this description are indexed for searching. For instance, if you typed in 'scar, right cheek, rose tattoo on chest, mary ribbon tattoo left arm' you would be able later to locate this person by any or all of the words in the special characteristics data fields.

Noteworthy, too, is the [F7]-Finances option. When selected the right hand option section displays access for up to six (6) indemnitors and [F8]-finance TERMS. First, a couple of

words about the indemnitor and financial ramifications.

Select the appropriate indemnitor key. For our example, let's tap the [F1] key. If the defendant is an indemnitor, tap the [F7] - defendant is indemnitor option (shown at the bottom of the screen). Let's do just that; hit the [F7] key now. Notice that the defendant's name is shown as indemnitor #1, the relation is shown as self, and since all of the biographical data is already in the system, it is not necessary to complete those fields. The cursor now jumps directly to the security. You have six short lines to describe the surety property. Finally, insert the amount of surety the security articles are valued at.

It is imperative that the security amount is accurate and does not exceed (together with all other indemnitor's security amounts) the total bail amount. If on the other hand the total security amount is less than the bail amount, then a partially secured bond is assumed by the system and will be so reported. No indemnitor causes the system to assume that the bail is entirely unsecured. BE CAREFUL, your financial surety position is at stake.

To clarify indemnitor data entry further, select [F7]-Finances again then finally [F2]-2nd INDEMNITOR. This time let's use another name. e.g. franklin, mary j. [Enter]. Notice that the cursor now drops to the address line. Using your previously acquired skills, complete the balance of biographical information followed by the security articles and the amount secured by this indemnitor. You will be able to locate a bond by indemnitor name, so make sure the last name first syntax rules are adhered to.

After exercising your hand at indemnitor data entry, select [F7] once again. This time we'll select the [F8]-finance TERMS option. Notice the red Premium Payment Schedule that appears on the screen consists of three (in your running module this may vary dependent upon your individual needs and policies) added fees, the summary of total payments and net amount now due, followed by two columns; one for scheduled payments and the second for payments received.

Let's experiment with each of the options displayed on the screen. First select [Alt][F6]-set state|county|admin FEES. Notice that two of the fees are already specified and the third not specified. The default amounts were written into the system; you may change them. Make sure that you ALWAYS type the decimal point when installing a dollar amount. What you see on the screen is what you get. Be careful. Make proper entries.

Notice that the net amount due will adjust as you modify the data fields. Now we'll assume that the client will pay you \$100.00 now and agrees to make 8 weekly payment for the balance. First select [F7]-Make PAYMENT; the date automatically appears and then the cursor prompts you to enter the payment amount. So, type in 100.00 [Enter]. Notice the new net amount. Now select [F1]-auto schedule. Type in 8 for the number of payments, the date of the first payment MMDDYY and finally the number of days between payments; in this case 7. Instantly the seven payment dates appear on the screen together with the payment amount due on that date.

If you wish, you could use the [F3} key to manually set the payment schedule or [F9} to

adjust and existing schedule. The [F5] key allows you to modify payments. When you are done tap the [Esc] key to return to the bond data module. You can now review your bond entry using the [F8] key, make modifications to the data entered by using any of the function key options or you can finalize the entry by tapping the [Esc] key.

When you exit [Esc] the bond, the data is written to the bond record and to many indices so that search access to the data can be accomplished.

Your screen will now display the [F1]-SEARCH for a Bond option. Let's select that one for our further discovery. Now 17 optional ways to search for data appear on the screen. Remember the marks and scars we enters on bond 501? Select the [Alt][F7]-search by MARKS & SCARS option. The screen now asks for key words; type in up to the first five letters of each descriptor you are seeking. e.g. mary_ tatto scar_ cheek.

You can refine the search further using any of the optional ranges that appear on the screen or just tap the [Esc] key (possibly twice) to access the next step; selection of the type of search. For our example, select [F6]-all bonds. Notice that the screen displays up to four matching bonds. If there are any more [F7] will cause them to display. At any time you may select the function key displayed on the right of each entry to access that bond. Let's try it. Tap the [F1] key. Notice the bond appears on the screen. You can now review or modify the bond. As previously discussed, use the [Esc] key to exit this bond. Any changes or updates will be duly recorded.

When a bond is accessed either directly or by any of the search options financial as well as biographical data can be modified or added to the data base. Upon completion of your financial entry, court date change or data modification, the system will update all indices, record the financial and status modification.

For example, if an existing bond was exonerated, you will change the status using function key [Alt][F9] until the appropriate exoneration reason is displayed on the screen followed by an [F2] change and inserting the termination date MMDDYY in the appropriate data field.

Examine the BAIL BOND-NET Documentation Manual for additional details related to data entry.

Having completed the JUMP START guide exercises, you are now ready to start using the BAIL BOND-NET program. Use the BAIL BOND-NET Documentation to guide you through the printing and calendar operations and to add to your knowledge of the system capabilities.