User Guide: Zelly Case Management System

Guide for effectively using the Zelly Case Management System

zelly.publiccounsel.net

COMMITTEE FOR PUBLIC COUNSEL SERVICES

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Introduction

This guide is a reference for using the CPCS unified case management system, **Zelly**. When Zelly was being developed, it was codenamed "Zeno."

Zelly is more robust and different from the three, legacy case management systems it replaces (CASEY, TRIS, CMS). If you are transitioning from a legacy case management system, you will find it requires significant changes in "muscle memory." Please be patient.

Zelly was created to better serve the needs of our staff in representing our clients. Zelly:

- Is built on modern, scalable technology
- Is mobile (phone, tablet, laptop, Chromebook, PC) friendly
- Introduces effective search
- Collects more data about our clients/cases for improved representation and advocacy
- Allows documents to be uploaded and downloaded
- May help identify systemic bias through collecting more complete data for assessment
- Modernizes security and access controls (making it easier for people to work and have access to data across multiple offices and divisions)

CPCS intends to add new functionality requests every 3-4 months. Requests will be received, assessed for effort, and queued for delivery based on consultation with the divisions.

Bug fixes will be released (depending on urgency) roughly monthly.

Like most CPCS systems (for security reasons), Zelly is only accessible within the United States. If you need access to the system while traveling outside the US, your Managing Director (or equivalent) must make a request to the CIO with a rationale for the request.

Logging In

You login at *zelly.publiccounsel.net* with your CPCS *email address* and *Windows password.*

Public Service Request on Process

While the purpose of this Zelly User Guide is to demonstrate how to use Zelly, Senior Management asked that I emphasize the following process request:

When entering witness data into Zelly, for each criminal case:

- Enter complete and exact name and date of birth for all witnesses
- Witnesses include, but are not limited to
  - Civilian (non-police) witnesses identified in police reports and other discovery, police officers, prosecution and defense experts, drug lab analysts, crime scene inspectors
- Continue to enter witness data as witnesses are identified throughout the criminal case

Getting Help / Providing Suggestions

- Read this manual (it is also under the ***About*** icon in Zelly)
- Check the FAQs on the IT web site (http://intranet.publiccounsel.net/IT) to see if your question has already been answered. More will be added over time
- Check the glossary on Zelly under the ***About*** icon
- Check out this Appendix for definitions of key fields, terms and icons
- Email zelly@publiccounsel.net with questions
    - Please be specific and descriptive in describing the issue
        - Write down the steps you were taking when you received a result that confused you
        - Copy the text of any error messages
        - Provide screen captures if you can
- Email zelly@publiccounsel.net to report bugs
    - Be as specific as possible regarding what you were doing and when (date/time)
    - Write down the steps you were taking when you received a result that confused you
    - Provide the URL from the web page. At the top of every web page, you will see a URL, for example, zelly.publiccounsel.net/case/details/5077. This is critical to troubleshooting your challenges
    - If in a *Case* or *Person*, provide the *Case* or *Person* number
        - *Case Number* is listed at the top of each *Case* page

        - *Person Number* <u>is listed at the end of the URL</u>

    - If you received an error message, provide the text or a screen capture
    - Provide screen captures to show the bug/problem
    - Indicate the browser used when the error occurred
- Email zelly@publiccounsel.net for feature suggestions
    - Be as specific as possible and provide not only the suggestion, but *why* you believe it is useful or an improvement

Cheat Sheet

The Cheat Sheet lists significant changes from existing systems or key points to keep in mind.

- You go to **zelly.publiccounsel.net** to login
- A ***Person*** is anyone interacting with CPCS through the legal system: SSA, Investigator, Client, Witness, DA, Judge, Sibling, Parent, etc. So, everyone is a "Person": defendant or not
- **Do NOT use Internet Explorer (IE)**. Unless absolutely necessary never use IE (it is insecure)
- You MUST **search for a *Person* before you may create a *Person*** to ensure a *Person* is not already in the system (avoids the legacy issue of multiple duplicate clients)
- You may **only create a *Case* from a *Person***
- *Navigation Bar* is the menu at the top of most pages that allows you to jump to sections within a *Case* or *Person*
- ***Actions Bar*** is the menu on the left side of every page that allows you to return to the dashboard, search (*Conflict*, *Person*, *Case*), get information, reports and log-out
- **Dashboard** is the landing page when logging in to Zelly. It displays search, cases and reports
    - **Cases** on the *Dashboard* default to show all cases. However, once you change it, it will remember your last setting
- To help avoid scrolling in long drop-down lists, most **drop-downs support type-ahead**, which finds the item you want as you type in the text (see Appendix: General Terms)
- **Most fields are optional**. If a field isn't relevant to your case-type, ignore it
- You may **access Zelly on any computer or with any web browser** (except IE)
    - You do not have to be on a CPCS PC or in the office or on GoToMyPC for access
- **Login** is your standard CPCS computer password and email address. When you change your CPCS computer password you will have to use that new password for Zelly
- Zelly is only accessible within the United States (see *Introduction* for details)
- Each time you open a *Case*, *Person*, or perform a *Search*, it opens a new window. You can always close windows (if unneeded) to reduce clutter
- **Sort** search results by clicking on the column headers in the results
- **If you are unsure what a field or icon does**, hover your mouse cursor over it for a few seconds and explanatory text ("tool-tip") should be displayed (see the Appendix)

- **IT can recover accidental deletions**. We track who changes or updates a *Person* or *Case*, which allows the recovery in event of deletion (even for a whole *Case* or *Person*)

- **Clicking the P*rint* or *Download* icon next to a *Section* title** (for example *Runsheet*) downloads or prints ALL the *Runsheet*s. If you click the *Print* or *Download* button next to a specific *Runsheet*, it will only print or download THAT *Runsheet*

- **Links in text**: If text is a color other than black, most likely you can click on it to bring up more information
- **You may search for anyone**: client, witness, police, judge, DAs, etc. All *Person*s are searchable
- The default search uses **Contains**. With this, you see results where names contain your search term (e.g., search for Smith shows Smith, Smithwick, Bernsmith, etc.). This can be changed
- You can use the tab key to move between fields
- **Bail only cases** may be quickly added from the *Case Search* sub-menu of the *Action Bar*
- The Table of Contents is your friend!

Quick Start

For more detailed descriptions or options, go to the respective sections in this document.

Create a new Person

1. Search using either *Person Search* or *Conflict Search*
    - You must search for a person before you may create a *Person*
2. If you find the right *Person*, you are done. You don't need to create the *PersonA*
3. If do not find the person you seek
    - Create a new *Person* using the *Add New Person* button that appears on the top of either *Person Search* or *Conflict Search* pages

Create a new Case

1. You may only create a *Case* from a *Person*
    - You may not create a *Case* first and then add a *Person*
2. Search for a *Person* using either *Person Search* or *Conflict Search* (see above)
3. If you find the right *Person*, go to that *Person's* page by selecting the *View Person Detail* button next to their name.
    - Otherwise, you must create a new *Person* before going to Step 4
4. From the *Person* page, select the *Add New Case* button

at top of the page

Create a new Bail Only Case

1. You create a *Bail Only Case* from a *Person* (for exceptions, see the Bail Only section)
2. Search for a *Person* using either *Person Search* or *Conflict Search* (see above)
3. If you find the right *Person*, go to that *Person's* page by selecting the *View Person Detail* button next to their name
    - Otherwise, you must create a new *Person* before going to Step 4
4. From the *Person* page, select the down arrow on the *Add New Case*

button to create a *Bail Only Case*

Dashboard

The *Dashboard* is the first page you see when you login. The *Dashboard* has four primary sections:

1. *Action Bar* – Left hand, blue strip of icons. Allows you to go home, search, etc.
2. *Search* – Defaults to *Conflict Check* unless you click the *Persons Search* button
3. *Cases* – Lists cases. The *Filter By* field on the right allows you to change what types of *Cases* are shown (Open/Closed: All *Cases*; Office *Cases*; My *Cases*). Allows search by docket number or case number or legacy case numbers (in the *Cases #* field). *Filter By* field will remember your last choice until you log out. Next to each case are two buttons that allow you to, respectively, quickly add a new runsheet or view all existing runsheets
4. *Reports* – Reports will be displayed based on the permissions of your role

Navigation

There are three primary ways to navigate:

1. *Action Bar*
2. *Navigation Bar*
3. *Search* (see Searching section)

Action Bar

The *Action Bar* is the left hand, blue strip of icons on every page. With it you can go home, search, etc.

The Home icon will take you back to the dashboard from any other page.

The *Check* icon performs a *Conflict Check*. It defaults to a simple check, but you may click the *advanced* link to perform an advanced search.

The *Silhouette* icon performs a *Persons Search*. It defaults to a simple search, but you may click the *advanced* link to perform an advanced search.

The *Briefcase* icon performs a *Cases Search*. With *Cases Search*, there is simple and advanced search, document-title search, runsheet search or *Add New Bail Only Case*.

Reports lets you run reports where you have appropriate permissions. What you see and run is dependent on your role and your office. This may be adjusted on request.

Admin is restricted to technical administrators and allows for such activities as adding new staff, updating people's permissions, merging duplicate *Persons*, etc.

The *Information* icon provides links to training materials (such as this document), a glossary, and support links for questions, reporting bugs, and requesting assistance.

Alerts is where you manage and view *Alerts* (see *Alerts* section). Alerts notify you when a *Case* you are subscribed to was updated, runsheet added, file uploaded, etc. You can view alerts, delete alerts, change when you are alerted, etc.

The initials at the bottom of the *Action Bar* are your initials. You can click this to logout of Zelly. If you using a public computer to login, make sure you sign-out with this

Navigation Bar

The *Navigation Bar* is the top, blue strip of text links on every *Case* and *Person* page. The purpose of the bar is twofold:

1. Show you all the key sections on a page, and
2. By clicking on a link, jump you to a section

The goal is to let you quickly (without scrolling) jump from section to section within a page. So, if all you want to do, for example, is hop down to *Runsheets* to view or edit or create a runsheet, you would simply click on the *Runsheet* link in the *Navigation Bar*.

The *Navigation Bar* is always visible on a page regardless of where you are on the page.

The actual links on a *Navigation Bar* change depending on whether you are on a *Case* or *Person* page to reflect the content of that page, e.g., a *Person* page has different content than a *Case* page.

Search pages do not have a *Navigation Bar*.

Below are examples of the *Person* page *Navigation Bar* followed by the *Case* page *Navigation Bar*.

Depending on the size of your screen, your *Navigation Bar* may wrap to allow you to see it without horizontal scrolling (*Case* example, above).

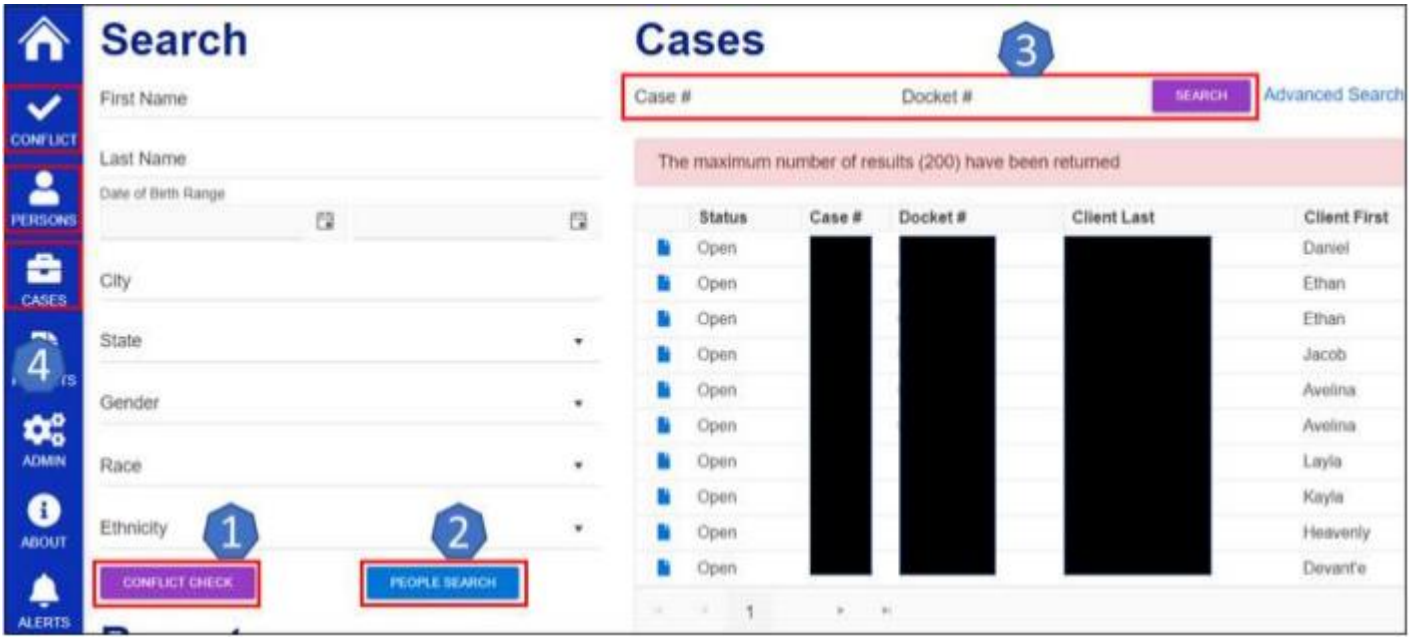
Searching

General

The Dashboard allows you to search in multiple ways:

- From the *Dashboard* itself, you can *Conflict Check* (1), *Persons Search* (2) or *Cases Search* (3)
    - **Note**: Hitting the return key defaults to *Conflict Check*
- From the *Action Bar* on the left, you may perform these same searches (4)

This is done because people work in different ways. Also, since the *Action Bar* is on every page, it means a *Conflict Check* or *Persons Search or Cases Search* may be performed from any page.



When searching, the default is a simple search – it only provides a few basic search fields. However, all *Search* have an *Advanced Search* link with more search options.

When searching, a new *Search* page window is created. The results are listed below the advanced search fields. This lets you use the advanced search fields to easily refine an existing search.

Note: The *Clear All* button lets you quickly clear all data from all search fields. This is useful if you have populated a number of the fields and want to set search back to default.

IMPORTANT: The default for searching is C*ontains*. With *Contains*, a search for a *Person* name shows all results that **contain** the search word or characters.

- For example, if you search for the last name **Masters**, the results list **Masters, Masterson, McMasters**, etc. All names that contain the **Masters**
- However, this can be changed with the *Modifier* drop-down. For example, by choosing *Exact*, it will only show Masters (no variations) or F*uzzy* finds names that sound similar

Displaying Search Results

By default, S*earch* displays 20 results.

The maximum number of results that may be found is 300. If there are more than 300 results, modify your search criteria to reduce the number of results.

At the bottom of the results window, you can see the total number of results (e.g., 1-100 of 179 items) and pages (defaults to 20 results per page). The number of results listed per page may be changed from 20 up to 100.

The system will remember your selection.

Conflict Check

A *Conflict Check* is used to determine whether CPCS may represent a person based on potential conflicts due to previous or current involvement with CPCS. For instructions on how to decide whether something is a conflict or whom should perform these checks, speak to your AIC.

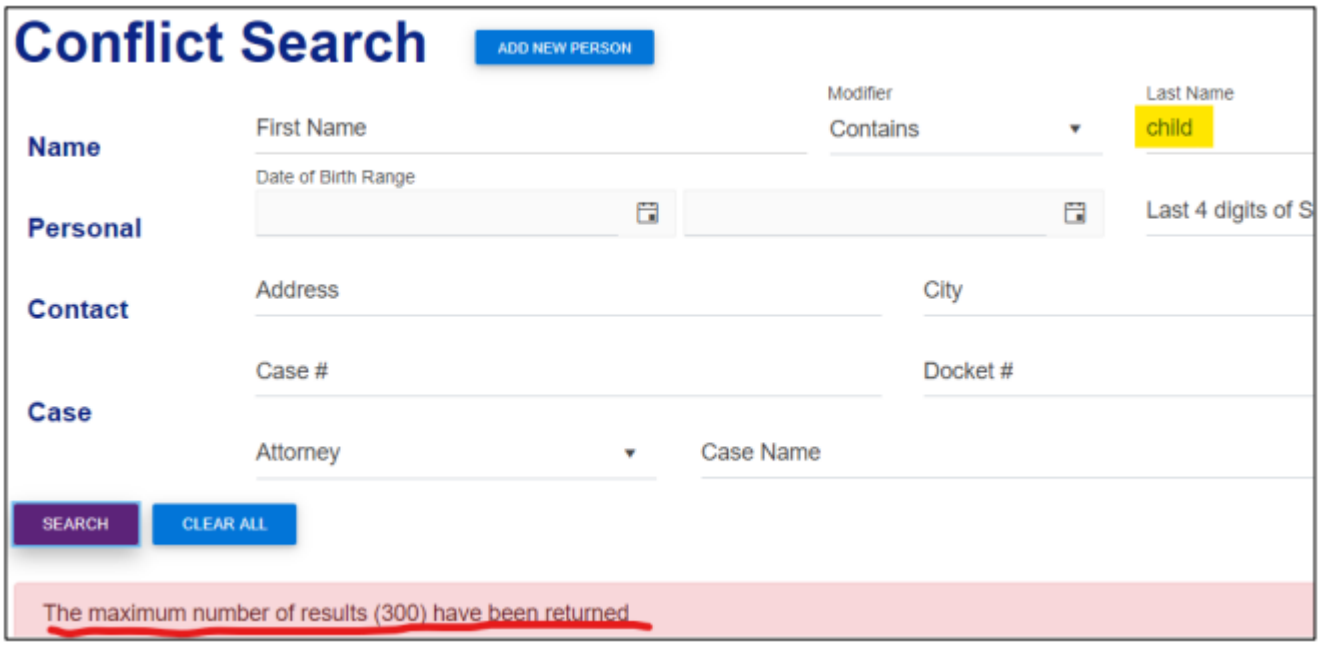
A *Conflict Check* differs from a *Persons Search*, because it lists a person based on their involvement with CPCS cases. Whereas a *Persons Search* simply shows *Person*-based contact and biographical information.

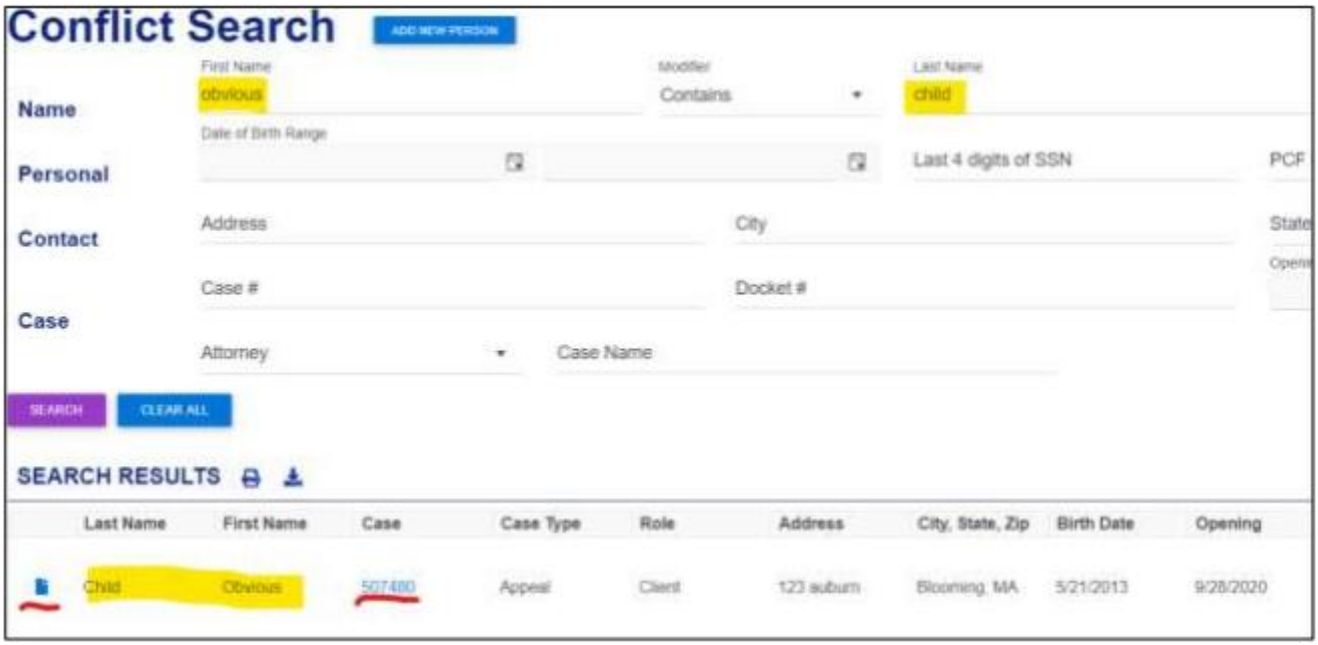
So, a *Conflict Check* may show multiple results for the same person depending on the number of *Cases* in which they were involved. *Conflict Check* shows the principal charge, case type, division, **role** in the case, etc. per case.

However, if a *Person* has multiple addresses (for example, four home addresses), they are only displayed in *Conflict Check* once for each *Case* with their *Primary* address listed for that *Person*.

If you get more results than necessary or unhelpful results are received, the search may be modified as illustrated below.

For example (below), if you are trying to find Obvious Child, searching on the last name Child returns more than 300 results, which is too many to wade through. Adding Obvious' first name reduces it to one (Obvious only has one case with CPCS) or even using just the first letter (O) reduces it to 135. Both major improvements.





Clicking the blue *Details* icon to the left of the name will open that *Person*'s details in a new window.

Clicking the blue *Case Number* to the right of the *Person*'s name opens the *Case* with which they are associated (in a new window). Even if the person isn't a client, if they are associated with a *Case*, *Conflict Check* will display them with their role on the respective *Case*.

The *Filter By* drop-down in *Conflict Check* allows filtering of result by:

- *All Cases*
- *All Open Cases*
- *All Closed Cases*
- *All My Cases* (*Open* or *Closed*)
- *All Office Cases*
- *All Office Cases* (*Open* or *Closed*).

Person Search

Person Search is typically used to find a *Person*'s contact information or a *Person* NOT attached to a *Case* (so wouldn't show in *Conflict Check*). It works similarly to *Conflict Check*, but displays only a *Person*'s contact information and some demographic information.

NOTE: If a person has never been associated with a *Case*, they will only come up in *Persons Search*.

A *Person Search* can be refined or modified as described above in *Conflict Check*.

Clicking the blue *Details* icon to the left of the name will open the *Person* details in a new window.

Cases Search

Cases Search has similar basic and advanced search functionality as *Conflict Check* and *Person Search*. In addition, it has some unique functionality.

Searching by *Case* number can be the Zelly number or an old *Case* number from CASEY/TRIS/CMS.

Unique Functionality

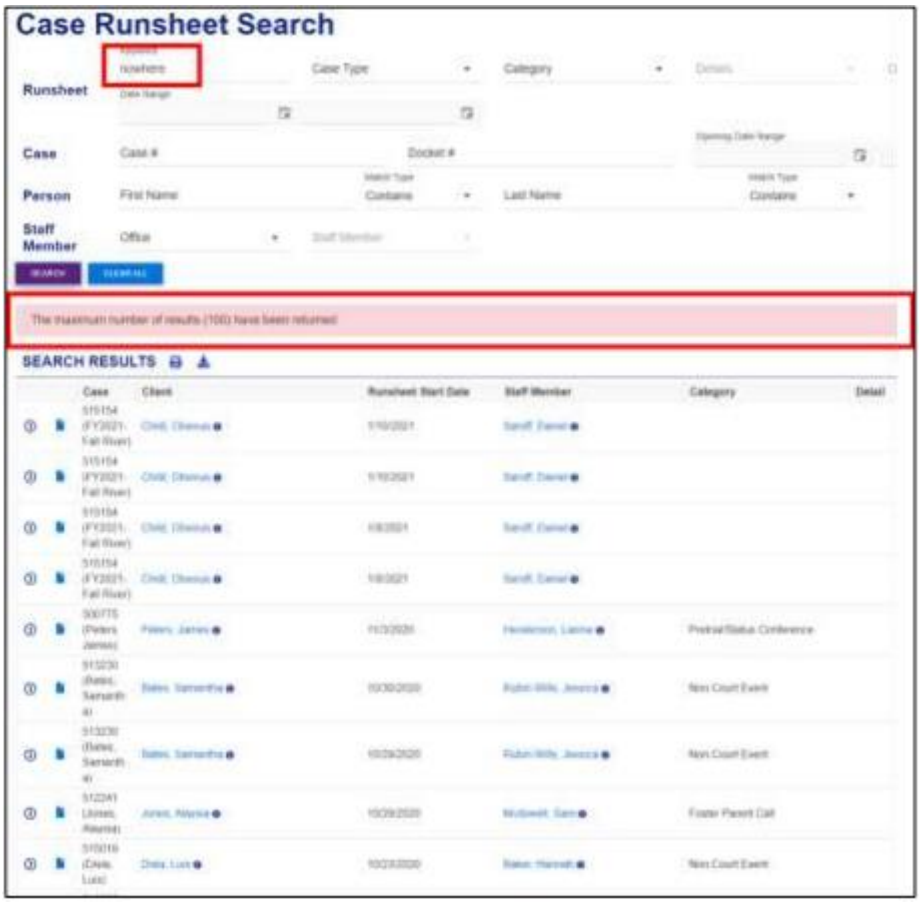
In addition to being able to find a case by *Case Number* or *Docket Number* or client (etc.), its **unique functionality** lets you:

- Find an attached document by searching for its file name
  - **Note**: It does not search the contents of any attached documents
- Find any runsheet by searching the text contained in the runsheet
  - **Note**: It does not search the contents of any attached documents
- **Quickly add a new bail** only case (see Bail only section for more ways to add a bail only case)

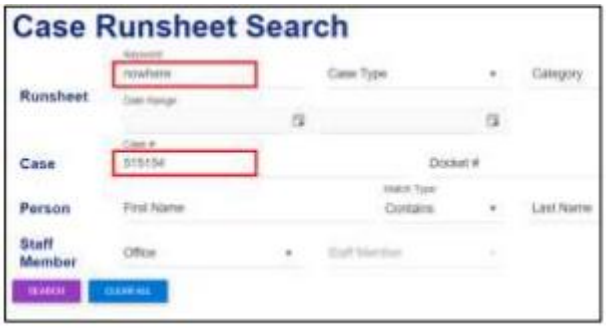
Case Runsheet Search

Cases Search **in the** ***Action Bar*** **gives you the option to perform a** ***Case Runsheet Search*****.** ***Case Runsheet Search*** **finds all** ***Case Runsheets*** **that contain the text searched for. You may refine or target the search by filtering with other criteria (like** ***Case number*** **where the** ***Runsheet*** **resides).**

Searching ***Case Runsheets*** **for the expression "nowhere," results in over 100** ***Runsheets*** **(*****Runsheet Search*** **maxes at 100) across scores of cases – too many to use.**



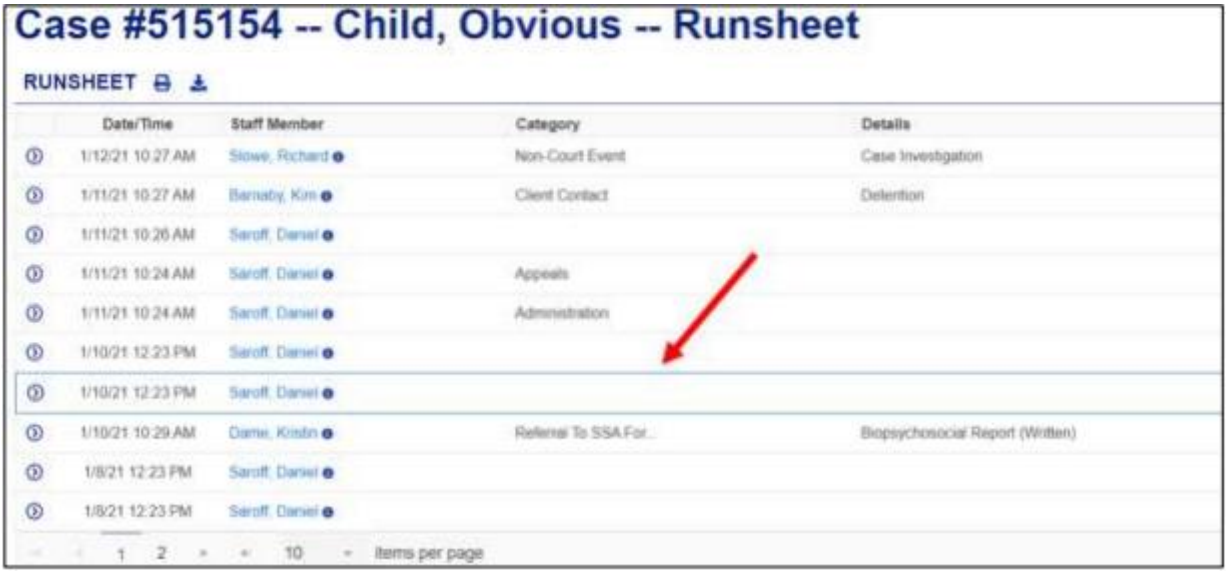
You may narrow the search. For example, you know the *Case* but are unsure which *Runsheet* in that *Case* has the text you seek? Simply add the *Case* number (for example, 515154) to narrow the search.



Refining the search, reduces the results from far more than 100 to four.

Expand icon (left) expands an entry result so you may view the *Runsheet* text.

The *Runsheet View* icon (far right) takes you to the entire listing of *Runsheets* on that *Case* and outlines the one you selected with a blue box. You can then *view, edit, copy* the *Runsheet*.



Adding a Person

Verify the Person's Existence

A *Person* may be added from the *Persons Search* or *Conflict Check* search screens or Participants on the *Case* page. Staff may only be added by the IT department

To reduce duplicate entries of *Persons* (clients, witnesses, police, DAs, experts, etc.), you must first search for a *Person* before you may add them.

If you look for an *Add New Person* button, unless you have searched for a *Person*, you won't find one.

There are 3 places where you can search for and add a person:

- *Persons Search*
- *Conflict Check*
- *Case* Page
  - *Persons*
    - *Participants*

Persons Search

Under *Persons Search*, once you perform a search (either finding some results or not), you will get an *Add New Person* button at the top of the page where you may add a new person to the system.

Conflict Search

Under *Conflict Check,* once you perform a search (either finding some results or not), you will get an *Add New Person* button at the top of the page that you may use to add a new person to the system.

General Adding a Person

Once you have searched and determined the person you seek is not in the system, you may create (add) a new *Person* by clicking the *Add New Person* button. In this example, I searched for *Person* "Obvious Child".

When you click the *Add New Person* button, it will take you to a page for creating the new person.

The system recognizes, since your searched for "Obvious Child," that it might be the name of the client you want to add, so it gives three options:

- *Add Different Name* - Allows you to use a totally different name from the one you searched for as the new person
- *Review & Accept* – Allows you to review the name, modify it, and save it
- *Accept* – Takes the search name and populates the name field
    - Note: If you only input one name (for example, only the first name, this option is not available)

In this example, I chose to *Accept*, and it created the *Person* "Obvious Child." The gold star indicates that I believe this is their primary name.

I could add other names by using the *Add Name button* (e.g., if the person also goes by "Obviously Kid"), and change which is considered as the *Primary*. This allows you to capture all names or aliases. You will note this option for many other fields. If you see a table in the format (above), it means you may add multiple versions of that data (multiple names, phone numbers, races, etc.).

Once you select the name, there are many fields you MAY populate, but are optional. For example, if you were adding a police officer to the system, you would leave most of these fields alone, but with a client you should know most. See: Appendix Person Field Descriptions for descriptions of key fields.

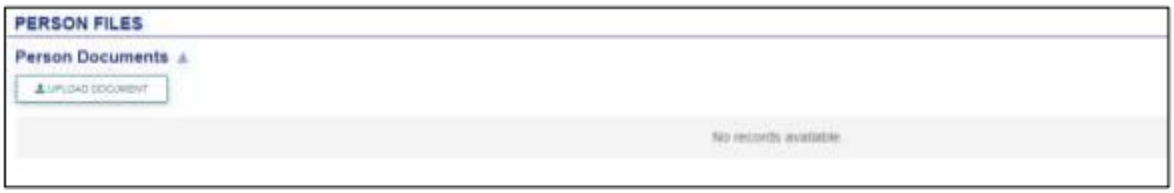
Currently no fields (except name) are mandatory. Data may be added or updated at any time. The system also lets you see edits and updates and who made these changes.

Before exiting, don't forget to save.

Person Runsheets and Files (Briefly)

A *Person* can have runsheets and documents attached to them, just like a *Case*.

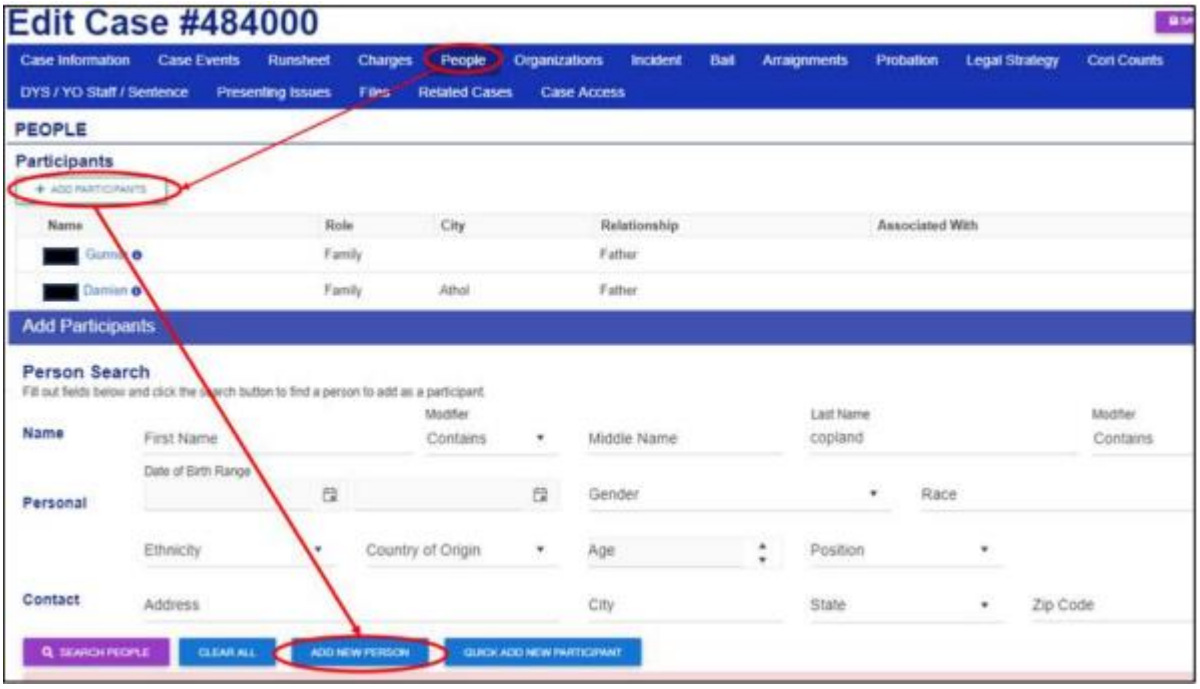
If a *Runsheet* or document is not specific to a *Case*, then you probably want to add it to the *Person*. In general, if you want some document or runsheet to "follow" the *Person* throughout their interaction with CPCS, not just a specific *Case*, add it to the *Person* page.



From a Case Page

When you are editing a *Case* page, you may add a *Person* to a *Case* from the *Persons* section under *Participants*.

When you try to add a *Participant*, you have the option of searching for the person you wish to add and if you don't find them, **you may create the *Person*** and then add them immediately to the case. Staff requested this functionality to make is easier to add *Case* participants.



Creating a Case

General

You may only create a *Case* from a *Person*.

Once you have found (or created) the right *Person*, you may create a *Case* from that client.

You cannot create a *Case* and add a client later. This prevents the issue in our legacy systems of cases created where clients were never assigned.

To create a *Case*, you must either find an existing *Person* (see: Search) or create a new *Person* (see: Adding a Person). Once a new *Person* is created, the process for creating a *Case* is the same as it is with a *Person* already in the system.

The *Add New Case* button is at the top right of the *Person* page. Using our friend, Obvious Child, you would see the following:

With the *Add New Case* button you may either add a new *Case* or, by clicking on the triangle on the button, quickly create a *New Bail Only Case.* This is done to simplify creating a Bail Only case.

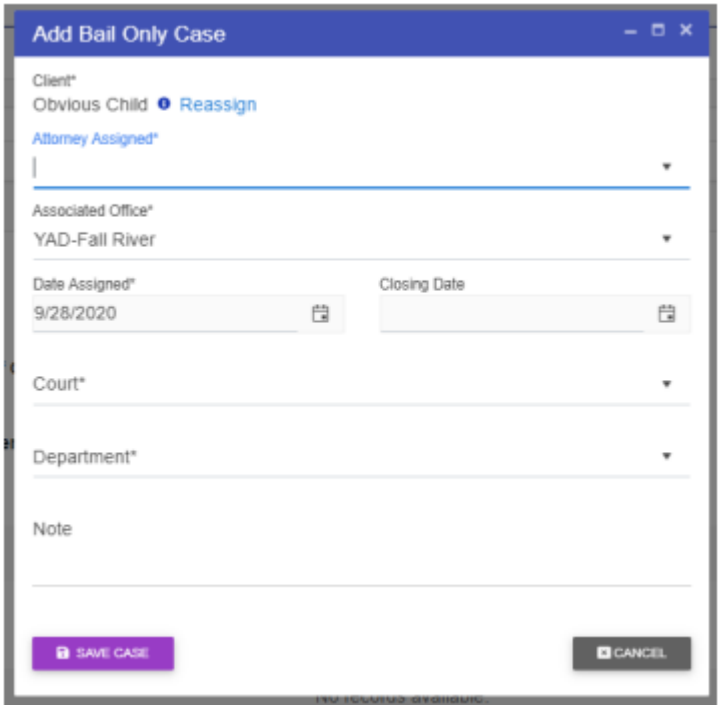
Bail Only Case

To simplify and speed-up creation of *Bail Only Cases*, Zelly has two quick ways to do this.

- *From Cases search in the Action Bar* (bottom link in the image)

- Or from a *Person* page by clicking the downward-facing triangle on *Add New Cases* button

In either event, you receive a pop-up that lets you quickly create a *Bail Only Case.*



If you create a *Bail Only Case* from a *Person*, it automatically assigns that *Person* to the *Bail Only.*

If you create a *Bail Only Case* from the *Cases Search* in the *Action Bar*, you then have to search for a *Person* to assign it to.

Editing a Person

View-only Mode

By default, **when you open a *Person***, they open in **view-only mode**. This is to reduce the risk of accidental edits or deletions when all you want is to review information on a *Person.*

However, even in *view* mode there are some actions you may still take:

- *Print* – Entire *Person*, section, or row of data
- *Download* – Download sections for sharing
- *Upload Document* – To either the *Person* or a *Runsheet*
- Add a *Person Runsheet Entry*
- *Edit* an existing *Runsheet*
- *View Person History* – Show all changes made to a *Person* and which staff made them
- *Add New Case*
- *Subscribe* – Subscribe to receive notifications of changes to a *Person*

You can take some of these actions from the *Other Actions* menu at the top-right of the screen.

Others actions you may take from the respective section (for example, print or download any group or section using the print or download icons or edit or add a new *Runsheet*). See: Printing/Downloading/Uploading Section for details.

Case History

When visiting a *Person*, you can see ALL the cases that *Person* is involved in regardless of their role in the *Case*. To see these cases, click *Case History* in the *Navigation Bar* to jump to that section. In this example, Obvious child is involved in twelve cases. In eight cases Obvious is a client, two cases a judge, one case a defense witness and one case a witness.

Editing Mode

To edit a *Person*, select the *Edit Person* button at the top-right.

If someone else is editing the *Person*, you will be notified and will be blocked from editing it (see Section: Locking a Case or Person). Otherwise, you may edit everything you have permissions to edit.

Some sections may have multiple pieces of information (for example, multiple names, multiple addresses, multiple races). Some can have only one piece of information (for example, *Ethnicity*).

Most sections that allow multiple items of information can have one item (for example, the latest home address of the person versus the five historical addresses) tagged as *primary*. You may change *primary* status simply by clicking the star next to the row and turning it gold.

Primary	Address Type	Address 1	Address 2	Addr
☆	Home	marquess		
★	Home	123 auburn		

The following areas allow for multiple entries (listed in order of appearance).

- *Names*
- *SSN* (last 4 digits)
- *Birthdates*
- *Races*
- *Languages*
- *Religions*
- *Citizenships*
- *Contact Information*
    - *Address History*
    - *Phone numbers*
    - *Digital Handles*
- *Individual Runsheets*

- *Positions*
- *Known Associates*
- *Organization Memberships*
- *Medications*
- *School History*
- *Documents*

The standard format that identifies a section accepting multiple entries is shown below.

Multiple Rows

Zelly allows for multiple rows of data for most sections.

For example, a *Person* can have multiple citizenships or addresses, be multi-racial, or speak multiple languages.

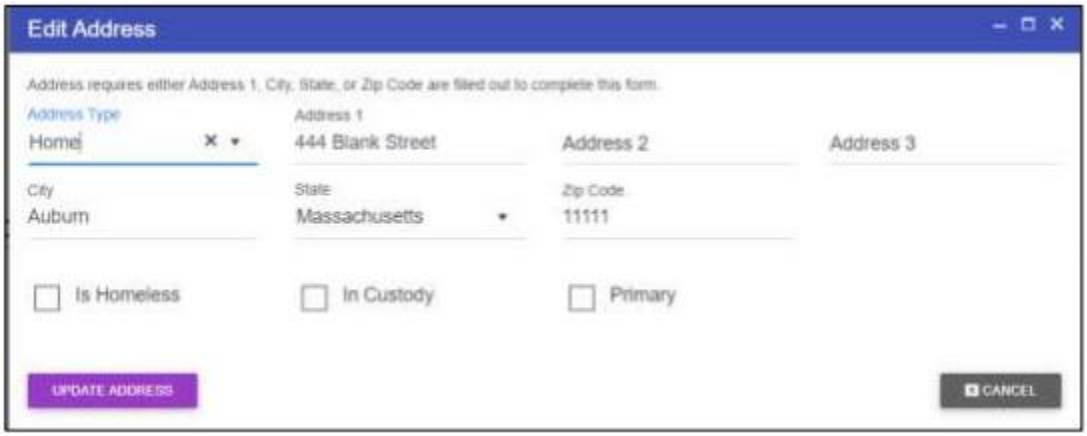
For almost all *Person* sections, there can be multiple rows AND one row may be indicated as the *Primary* (for example, the preferred language for communication). This *Primary* designation may be changed at a later date.

This process for adding rows and identify a *Primary* row of information works the same for all sections where you may have multiple rows of data.

For example, Obvious Child has an *Address History* with three addresses where 123 Auburn Street being designated as a *Primary* (gold star).

Obvious Child has moved to a new *Home* address at 444 Blank Street in Auburn, MA.

To add the new address, select the *Add Address* button, select *Home* from the *Address Type,* and then input the address information and select the *Add Address* button. If it is the new *Primary* address, you can check that box in the *Edit Address* box or simply click on a different star in the *Address History* list.



In this example, I clicked on the gold start next to the new 444 Blank Street address to indicate that this is Obvious Child's new primary address. Don't forget to save the *Person*.

Primary	Address Type	Address 1	Address 2	Address 3	City	State
☆	Other	999 Trial Road			brockton	Massachusetts
☆	Home	marquess			Worc	Massachusetts
☆	Home	123 auburn			Blooming	Massachusetts
★	Home	444 Blank Street			Auburn	Massachusetts

Known Associates (adding relatives and others)

Known Associates is used to capture for a *Person* the people in their lives who were with them before or after a *Case*, for example, friends, doctors, parents, siblings.

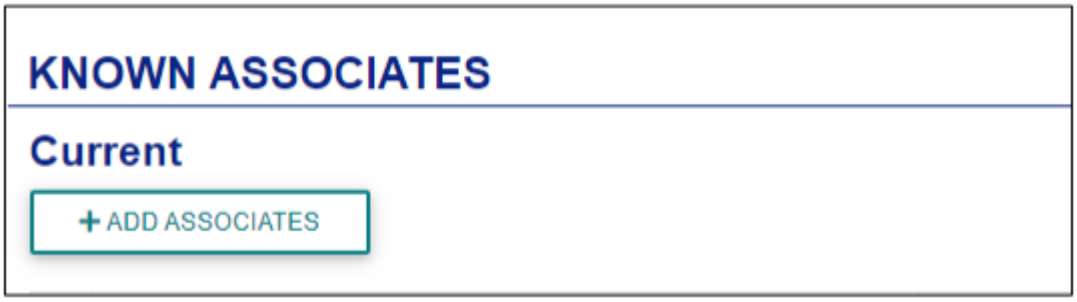
You want to use *Known Associates* when you feel it is beneficial that these people and their relationship to a specific person should be part of that *Person* record, not just captured for a specific case. These are people that are important in that *Person's* life for any reason.

Note: While *Known Associates* are created in the *Person* page, they will ALSO display in any case where that *Person* is a client (in the *Client Known Associates* section).

To add a *Known Associate*, you must be in *Person Edit* mode.

Navigate to the *Known Associates* section (scrolling or using the *Navigation Bar*).

Select the *Add Associates* button



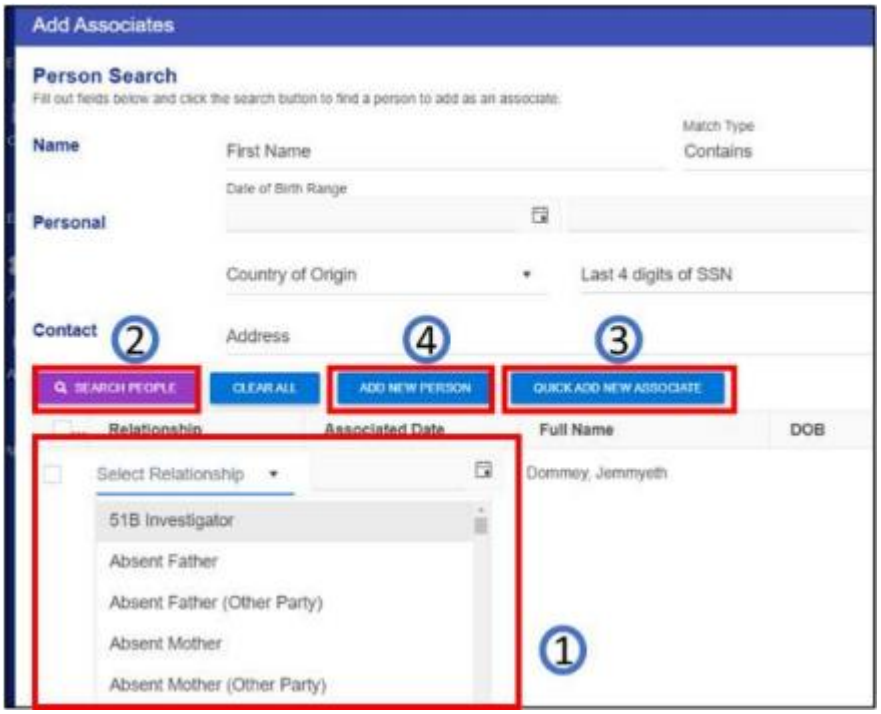
Search for the *Person* you wish to add. In this case, we search for a father of the *Person* (Obvious Child). The father's last name is **Dommey**.

In this example, only one *Person* with the last name is found.

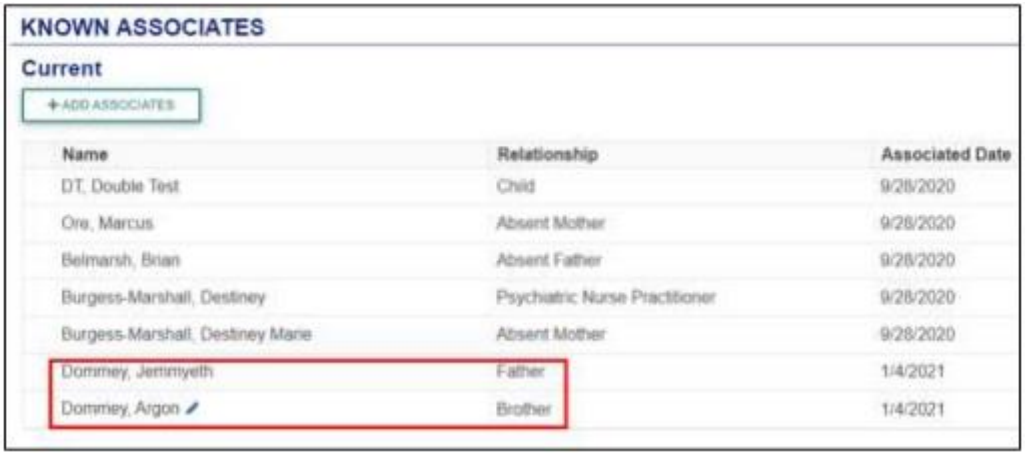
If this is the correct person, you may simply (1) click the checkbox, select the relationship to Obvious Child (in this case this *Person* is the Father) and then select (5) *Add Selected Associate(s)*.

Note: If search returns multiple people, you may add multiple associates at the same time by simply clicking multiple checkboxes (1)

1. Shows the results of your search and lists anyone matching your search criteria. You may simply select the name you want, indicate their relationship to your client/*Person* from the drop down (1) and then add them (5) as a *Known Associate*
2. *Search People:* Let's you refine your search by adding or modifying search fields and then searching again
3. *Quick Add New Associate*: If you don't find the correct *Person* (meaning they aren't currently in Zelly – presuming your search was accurate), it allows you quickly add that *Person* to Zelly AND use them for a *Known Associate*. This is done so new associates may be quickly added for a *Person* without going through the full process of creating a *Person*. It is meant to expedite adding new associates to a client/*Person*
4. *Add New Person*: If you don't find the correct *Person* (meaning they aren't currently in Zelly – presuming your search was accurate), it takes you to the full *Person* creation process. You would do this if you want to add significant information on this *Person* (and have the time) before you add them as a *Known Associate*
5. *Add Selected Associate(s)*: Add a *Person* as a *Known Associate* to the current *Person*



In this example, I added Jemmyeth Dommey as a *Father*, and *Argon Dommey* as a *Brother* to Obvious Child. *Argon did not exist in Zelly,* so I used the *Quick Add New Associate* to both create Argon and then add him as Obvious Child's brother.



Professions

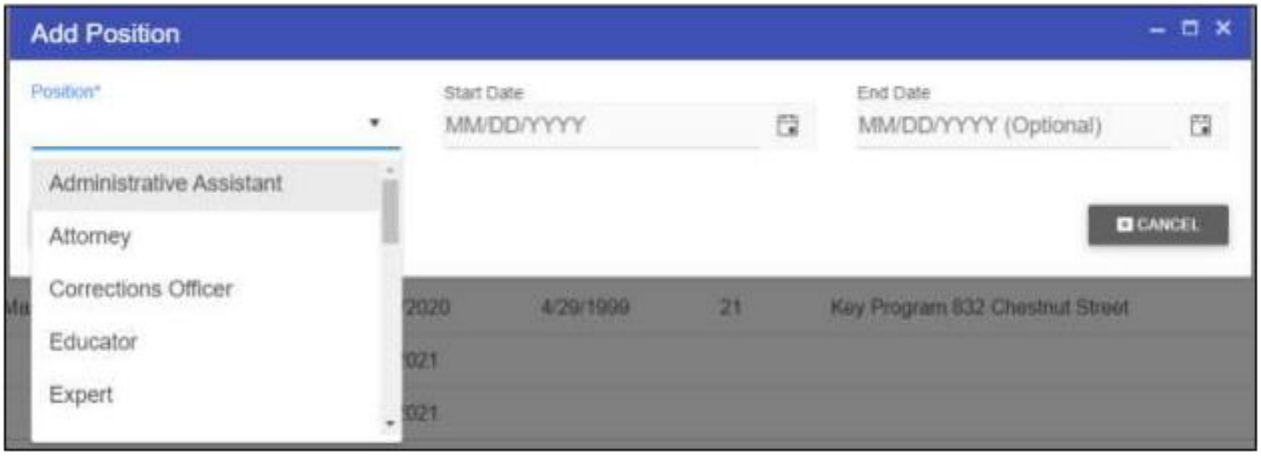
A person can have a *Profession.* A *Profession* is what someone does, for example police or social worker or judge or prosecutor or teacher or psychiatrist. *Profession* will determine whether a person might be selected for a *Case* as a prosecutor or judge (when flagged as such). **A *Profession* on a *Person* is the same as a *Profession* on the case.**

To assign a *Profession*, you go to the *Person* page. Edit the *Person*. Go to the *Positions* section and click the *Add Positions.* Don't forget to save the *Person*.

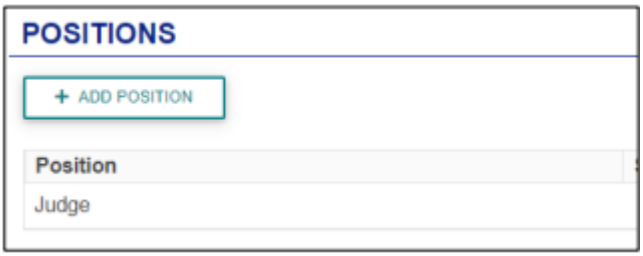
If Obvious Child were a judge, that would be their *Position* or *Profession*. To assign them as a judge, you would:

1. Edit Obvious Child and then navigate to the *Position* section.

2. In the *Positions* section, click the *Add Positions* button
3. Pick the *Position* from the drop-down and then click the *Add Position* button



4. Obvious Child will now have the *Position* of *Judge*. Don't forget to save the *Person*



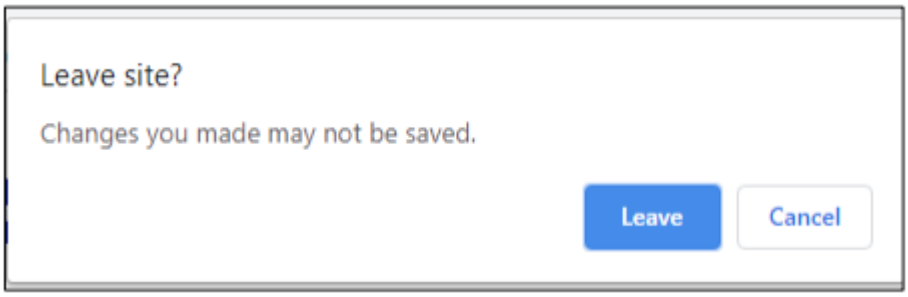
Saving

Don't forget to save your change before using the back button or leaving the page.

Also, if you made changes, but have not saved the changes, don't leave your computer idle for too long or you will lose your changes (this is how EVERY browser-based application works).

If you try to exit the *Person* before saving (for example, forgetting and trying to use the browser back button), you should receive a warning that you will lose your changes (but never bet on should when it comes to saving a whole bunch of work).

If you receive this warning, and don't want to lose your changes, click **Cancel** and save the *Person.*



Overall recommendation is to save frequently.

Editing a Case

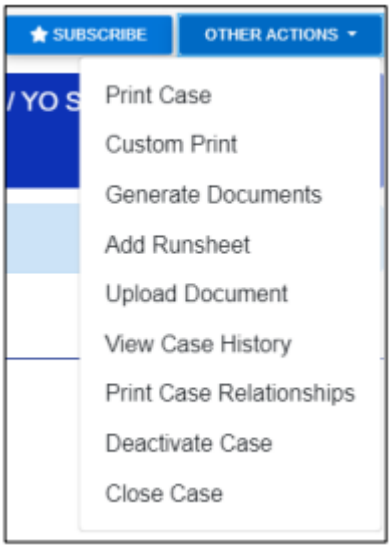
Editing a *Case* works similarly to editing a *Person* (see: Editing a Person Section).

View-only Mode

By default, **when you open a *Case***, it opens in **view-only mode**. This is to reduce the risk of accidental edits or deletions when all you want is to review information on a *Case.*

However, even in *view* mode there are some actions you may still take.

- From the *Other Actions* button (upper-right) you may:
  - *Print Case* – Print the entire *Case* in hard copy or PDF
  - *Custom Print* – Mix and match what you print
  - *Generate Documents* – This creates and attaches to the case key case opening documents for PDD, CAFL, MHLD, and YAD Cases (emulating previous systems)
  - *Add Runsheet Entry*
  - *Upload Document* – To either the *Case* or its *Runsheet*
  - *View Case History* – Show *Case* changes and which staff made them
  - *Print Case Relationships* – Print includes contact information, who is on the case and their relationship to other *Person*s on the case
  - *Deactivate Case* – Hides a case. Used if a *Case* was mistakenly created or a conflict causes CPCS to remove itself from a case. Only certain roles can *deactivate* it. IT can restore a *Deactivated Case*
  - Close *Case* – Closes a case



- Additionally, in *view* mode there are some actions you may take from elsewhere in the *Case*, you can:
  - Add, view and edit *Runsheets*
  - Upload/download or view *Documents*
  - Print or download any item using their respective *Print* or *Download* icons.
  - *Reassign* an attorney
  - SSAs and Investigators may adjust their *Effort Levels*

Editing Mode

To edit a case, select the *Edit Case* button at the top-right. EDIT CASE

If someone else is editing the *Case*, you will be notified and blocked from editing it (see: Locking a Case or Person section). Otherwise, you may edit everything you have permissions to edit.

Some sections can have multiple pieces of information (for example, multiple participants, multiple case events or multiple charges). Some can have only one piece of information (for example, *Bail*).

Most sections that allow multiple items of information can have one row (for example, the lead charge) tagged as *primary* (or *lead* in the case of a charge). You may change *primary* status simply by clicking the star next to a row and turning it gold.

The following areas allow for multiple entries (listed in order of appearance).

- *Case Events*
- *Runsheet*
- *Charges*
- *Participants*
- *Case Professionals*
- *Previous Professionals*

- *Child Placement*
- *Organizations*
- *Case Incidents*
- *Runsheets*
- *Case Files*
- *Related Cases*
- *Case Access*

The standard format that identifies a section accepting multiple entries is shown below.

See Appendix: Case Field Descriptions for a definition of key fields in a *Case*

Participants

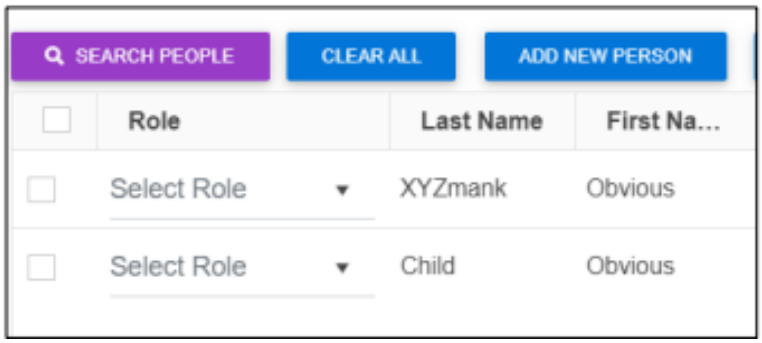
A ***Participant*** is a *Person* that is involved in a *Case*, but where a case or being involved in the legal system is not a core part of their professional career. So, PDY or a witness or a victim are **participants** in the case, but not professionals. **See appendix for listing of these roles**. Participating in a case is not part of their professional duties as it would be for police, judges, attorneys, etc.

Adding a *Person* Already in Zelly

To add a *Person* to a *Case* and give them a *Role* on a *Case*, you select the *Add Participants* button and search for the *Person*.

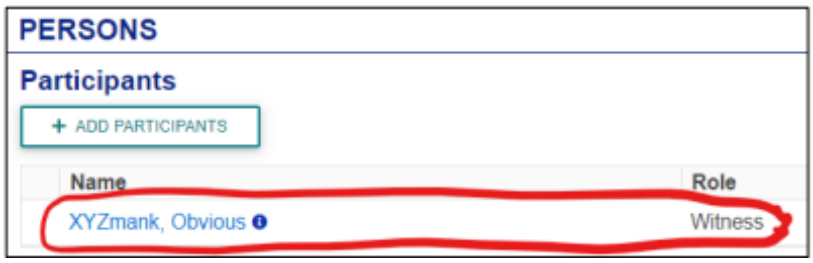
In this example, the search is for a *Person* whose first name is **Obvious** who is a **Witness**.

Two people are found: **Obvious Child** and **Obvious XYZmank**. XYZmank is the *Person* we wish to add as a witness.



So, I select the check box and pick their *Role* as ***Witness***, and then click the *Add Selected Partipcant(s)* button to add them to the *Case*.

Obvious XYZmank has now been added as a **Witness** to this *Case*.



Don't forget to save the case.

Adding a *Person* NOT in Zelly

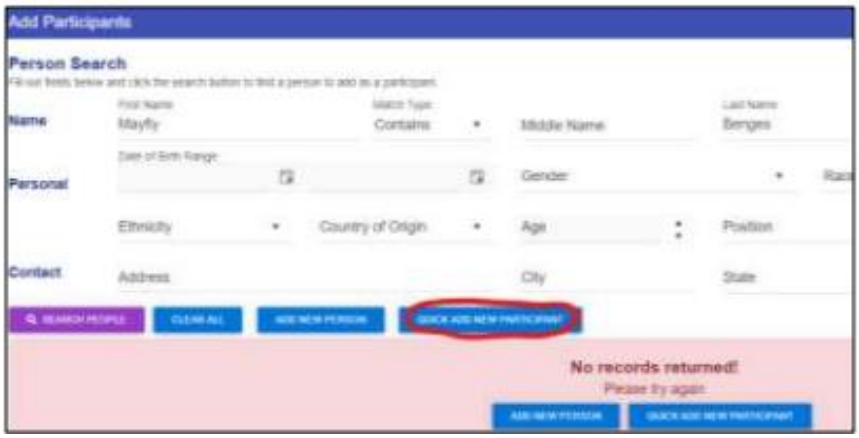
Sometimes, a *Person* we want to add as a *Participant* to a *Case* isn't in Zelly. So, they need to be created before they may be added to a *Case*.

There are two methods enabling staff to do this quickly and easily from the *Participant* section of a *Case*. The two methods are: **Add New Person** or **Quick Add New Participant**.

- **Add New Person** – Opens a separate browser window for the full *Person* creation process. This is the robust solution to add more personal information. Section: *General Adding a Person*
- **Quick Add New Participant** – This is a <u>quick and dirty method</u> that simultaneously CREATES a *Person* in Zelly and ADDS them as a *Case Participant*. It only allows a very limited amount of information about the *Person*. The goal is to allow you to quickly add someone to Zelly and assign them simultaneously as a *Participant* on the *Case.* At a later date, you may edit the *Person* to add more information

Example: **Quick Add New Participant** "Mayfly Benges" as a witness. When I search, they are missing.

I'm in a hurry, so I simply want to quickly create and add them and keep working (rather than spend time on the more robust **Add New Person**). I select the *Quick Add New Participant* button.



You'll note that this only allows me to add a very limited amount of information to the *Person* I am creating and adding: First Name, Last Name, Middle Name, Suffix, Birthdate. That's why this is called the quick process. If you want to add more information at this time Add New Person is preferred. At any later date, you may edit Benges and add more information.

Note: We are often asked which is the "right" or "preferred" solution to create and add a *Participant*: **Add New Person** or **Quick Add New Participant?** The answer depends. If you are time pressured and simply need to create and add a new *Person* to a *Case*, then use the quick method. If you have more time or need to add more detailed information at that time, use the full new person method.

Don't forget to save the case.

Case Professionals

Zelly lets you add any professional to a *Case*. A ***Case Professional*** is any *Person* whose professional career involved court and legal proceedings . Examples would be a judge, police, attorneys, expert witnesses, etc. **See appendix for listing of these roles.**

Any *Person* added to the *Case Information* section of a *Case* will automatically be added to the *Case Professionals* sub-section for a *Case*.

A *Person* may only be added as a *Case Professional*, if they have been tagged with that role. So, you couldn't add Obvious Child as an Arraignment Prosecutor, if they weren't listed as having that *Position*. **Note**: CPCS staff are automatically added to Zelly with their role at CPCS.

So, in the example of Obvious Child being an Arraignment Prosecutor. If Obvious Child's *Person* page does not list them as having the position of Arraignment Prosecutor (or police or judge or prosecutor), they would not show as an Arraignment Prosecutor in the *Case Professional* drop-down list for Arraignment Prosecutor. Someone would need to edit Obvious Child to make them Arraignment Prosecutor attorney by:

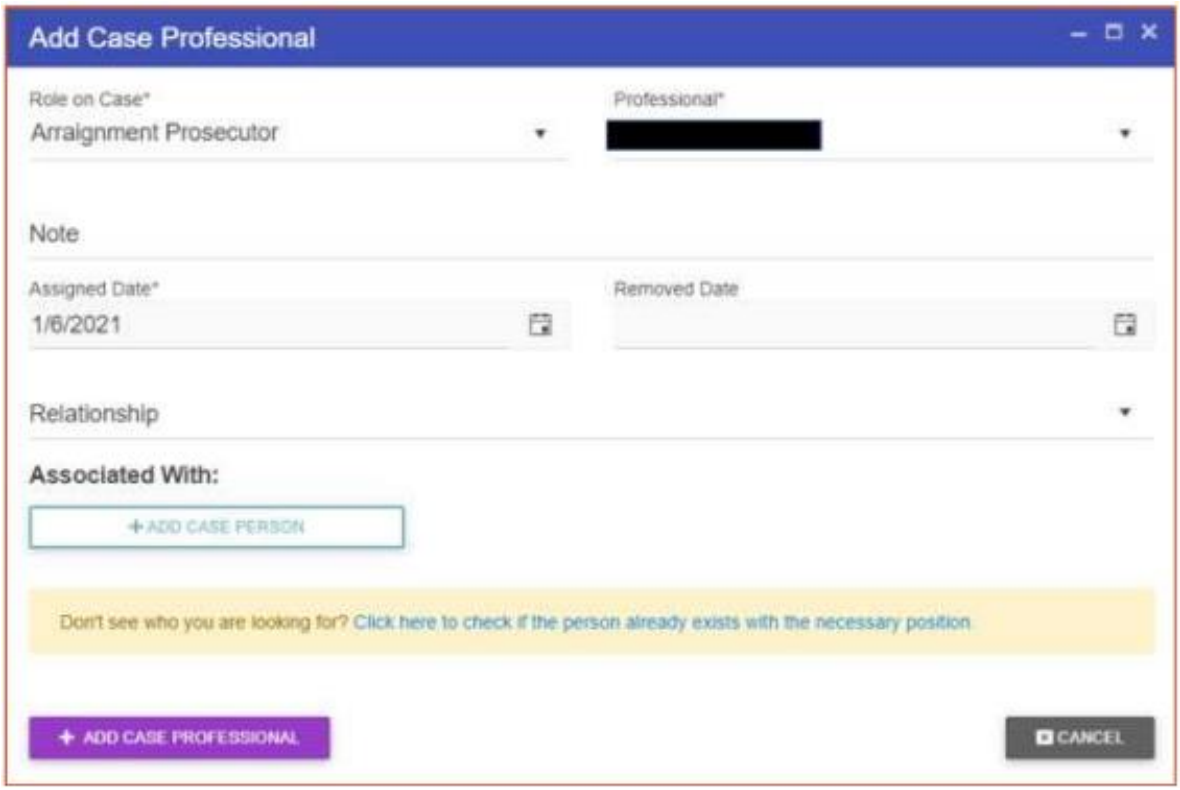
1. Going to Obvious Child's *Person* page
2. Clicking the *Edit Person* button
3. Select *Positions* in the *Navigation Bar*
4. Click *Add Position* button
5. From the *Position* drop-down, select the position of Arraignment Prosecutor
6. Click *Add Position* button to accept
7. Don't forget to save Obvious Child

Now, Obvious Child will appear under attorneys and may assigned to a *Case*.

To add a *Case* Professional:

1. Go to the *Case*
2. Select the *Edit Case* button at the top-right of a case
3. Navigate to the *Persons* section of the case
4. Click the *Add Case Professionals* button
5. Under the *Role on Case* drop-down, pick their role (judge, prosecutor, police, expert, etc.)

6. You will then be able to add anyone who has the role of Arraignment Prosecutor in Zelly

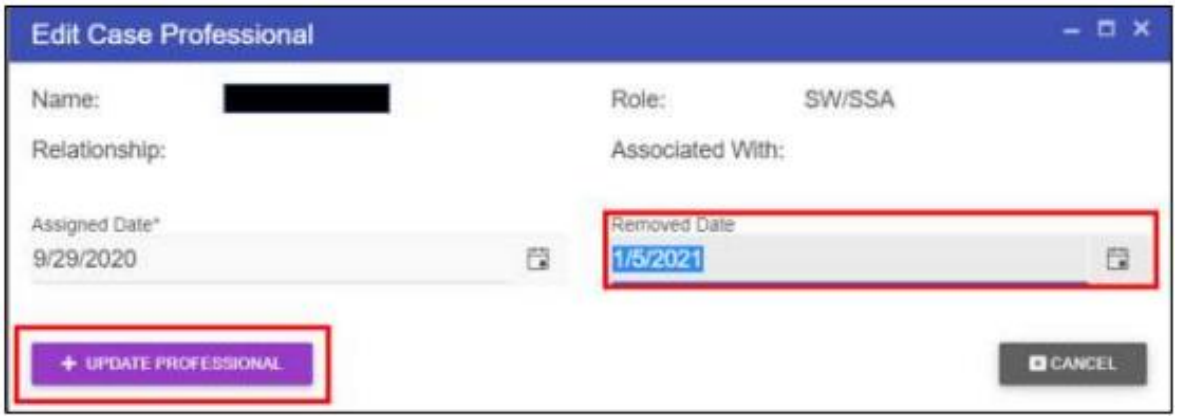


7. Select *Add Case Professional* to save the selection and don't forget to save the *Case*

Previous Professionals

Sometimes a professional working on a case leaves a case and then returns to it at a later date. When someone leaves a *Case*, they can be marked as a *Previous Professional* by *Editing* the *Case* and then selecting the button next to the *Professional's* name, and then clicking the *Remove Professional* button. When a *Professional* is removed, they are moved to the *Previous Professionals Section*.

They may be restored by selecting the *Edit* (pencil) icon next to their name, deleting the *Removed Date* from the pop-up, and clicking the *Update Professional* button. Don't forget to save the *Case* before leaving.



SSAs/Investigators and Level of Effort

Social Services Advocates (SSAs) and Investigators may add themselves to *Cases* and indicate their level of effort on a case. SSAs and Investigators track their level of effort on a *Case*. They are added as *Case Professionals* under the *Persons* section of a *Case*.

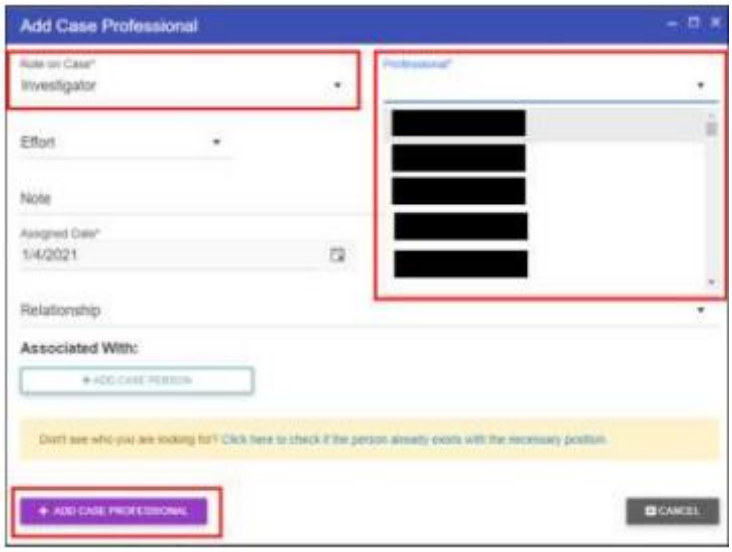
When adding an Investigator and SSA, you only see staff assigned to that role in the system. If you do not see the staff with the *Role* you chose, it means they may not be in the system. Send an email to zelly@publiccounsel.net with the staff name, email address, office and division to rectify.

Note: When adding an Investigator or SSA, their *Level of Effort* can be indicated. It may be updated at any later date.

Method 1: To add an SSA or an investigator to a *Case* is simple. It is the same as adding any *Case Professional*:

1. Select the *Edit Case* button at the top-right of a case
2. Navigate to the *Persons* section of the case
3. Click the *Add Case Professionals* button

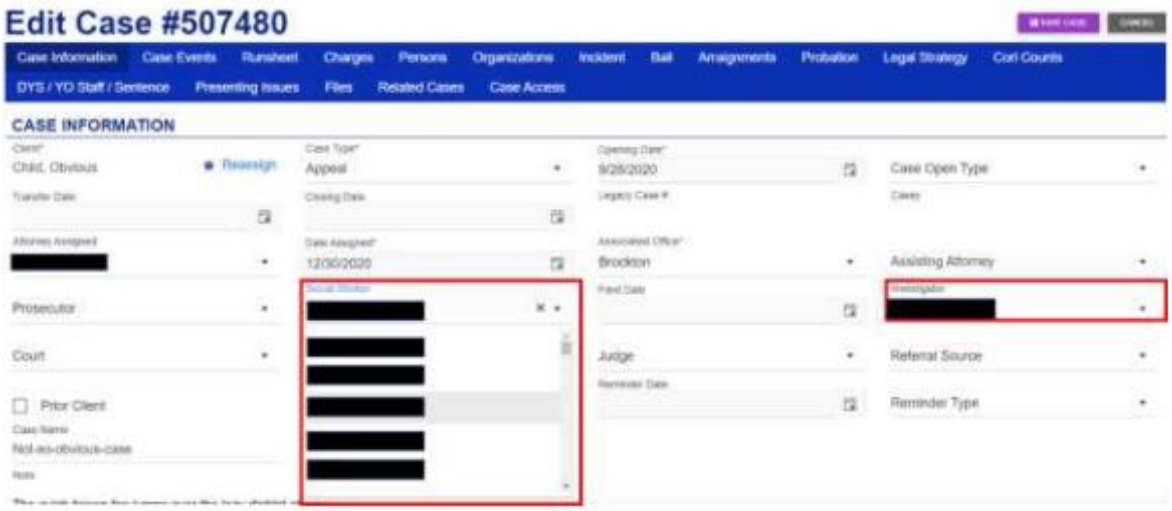
4. Under the *Role in Case* drop-down, pick *Investigator* or *SW/SSA*



5. Under *Professional* pick the name of the SSA or Investigator you want to add
6. Click *Add Case Professional* to choose that *Person* and don't forget to save the *Case*

Method 2:

1. Select the *Edit Case* button at the top-right of a case
2. In *Case Information* section, change the *Person* selected in the SSA or Investigator field to the new person and then save the *Case*. The *Person* formerly in that box will be reclassified into the *Previous Case Professionals* section under *Persons.* If you wish to have more than one **active** *SSA* or *Investigator*, you need to use Method 1

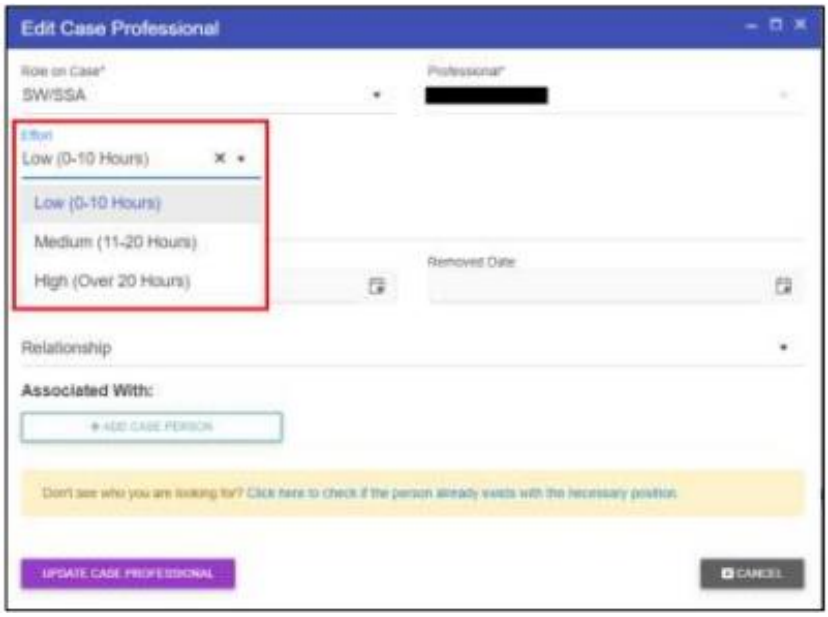


To provide or modify level of effort:

1. Select the *Edit Case* button at the top-right of a case
2. Navigate to the *Persons* section of the case

3. Select the *Edit* icon next to the SSA or Investigator listed as the *Case Professional*

4. Select *Effort* from the drop-down and then click the *Update Case Professional* button.



5. Don't forget to save the *Case*

Adding Charges

Charges may be added to a *Case* at any time. They may be added when a *Case* is created, edited, and even up until closing the *Case*.

District and Superior court charges may be added to the same *Case*.

A *Lead Charge* may be designated and may be changed at a later date. The lead attorney on the *Case* determines or identifies the *Lead Charge* or whether the *Lead Charge* may change (for example, the charge was dropped or the client pled to a lesser charge).

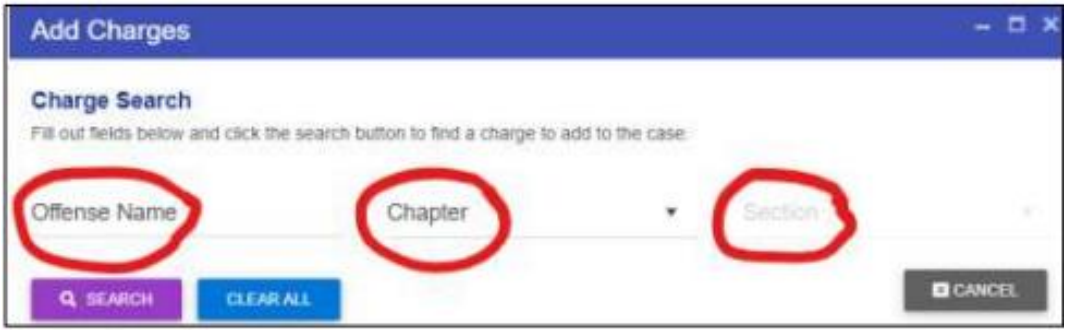
In the following example, we have a *Criminal Case* for client Obvious Child. We need to add some charges to the case and identify the lead charge. Also, because most of the charges stem from the same date and are in the same court, we want to input the information for one charge and have it apply to all other charges.

To add charges, you must select the *Edit Case* button EDIT CASE in the upper right, and then navigate to the *Charges section.*

In the *Charges* section, click the *Add Charges* button + ADD CHARGES to open the box for searching and adding charges.

When adding a charge(s), you may search by *Offense Name* or *Chapter* and *Section*.

Note: You will only see the *Section* option when you picked the *Chapter*. *Chapter* and *Section* allow type-ahead, so you may start typing the number you seek and it will hop down to it.



Once you input the *Offense or Chapter/Section*, select the *Search* button to find the charge(s) you seek.

Obvious Child is accused of c. 90 s.24V(a)(1) *Charges* (OUI child endangerment). I chose to simply search by *Offense Name* for "endanger" rather than *Chapter* and *Section.* The following four results were found, because they had the word "endanger" in the description.

I select (checkbox) the two relevant charges and pick the lead charge (radio button). You don't have to pick a *Lead Charge* or a *Lead Charge* may be selected later. I then enter the *Offence Date, Docket*

Number, and Court Level Type for one charge and by selecting the *Copy Down* button , it copies all the information I just entered to the *Charge* listed below. This is a major time saver, if you have

multiple *Charges* with the same information. Simply enter it for one and use the *Copy Down* button to copy the information to charges listed later in the list.

Now select the *Add Charge(s)* button to add the *Charges* to the *Case*.

The *Charges* have now been added to the *Case*. Additional *Charges* may be added at any time through the same process.

An existing *Charge* may be edited or deleted by selecting the *Edit* or *Delete* icon at the end of its row.

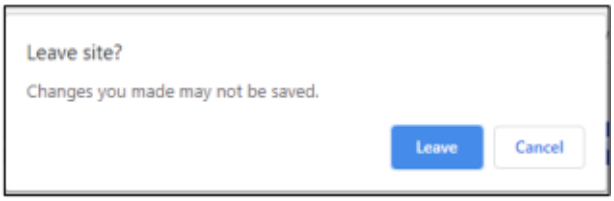
Don't forget to save the *Case*.

Saving

Don't forget to save your change before using the back button or leaving the page.

Also, if you made changes, but have not saved the changes, don't leave your computer idle for too long or you will lose your changes (this is how EVERY browser-based application works).

If you try to exit the *Case* before saving (for example, forgetting and trying to use the browser back button), you should receive a warning that you will lose your changes (but never bet on <u>should</u> when it comes to saving a whole bunch of work). If you receive this warning, and don't want to lose your changes, click **Cancel** and save the *Case.*



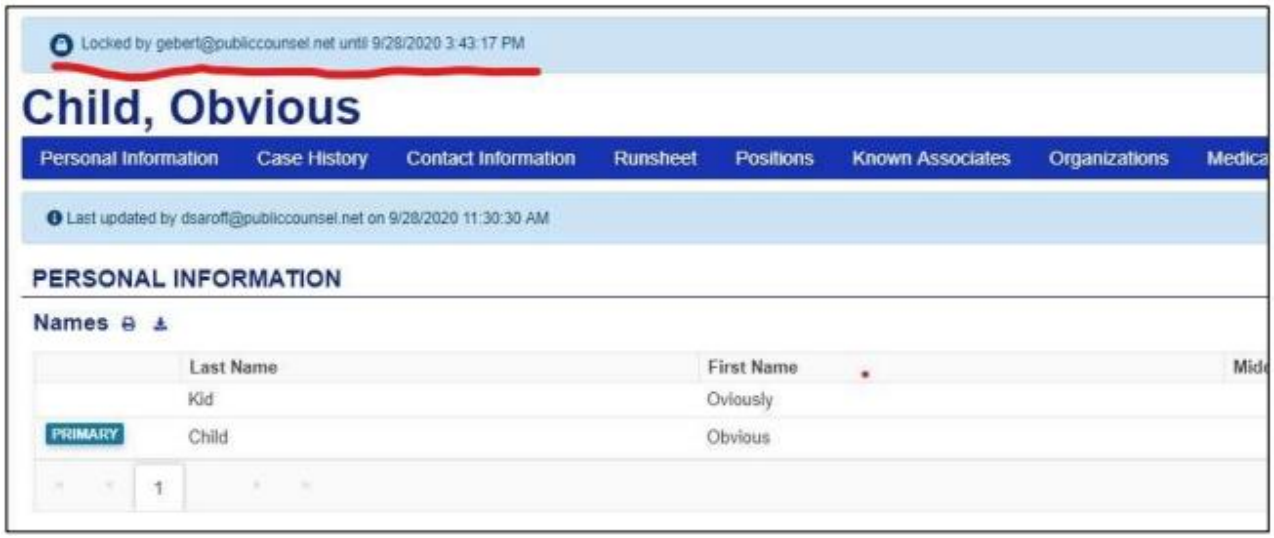
Overall recommendation is save frequently.

Locking a Case or Person

Two people cannot edit a *Person* or *Case* at the same time (however, there is no restriction on the number of people who may **view** a *Case* or *Person* simultaneously).

If two people try to edit a *Case* or *Person*, the first one can edit, but the second one may only view it. The second staff member will be locked-out until the other editor is done (i.e., closing or cancelling the edited page, saving or the lock time expires). A page will stay locked for up to thirty minutes.

The system shows the current editor.



Runsheets

Runsheets are where notes are kept on a *Case* or a *Person*.

Note: Runsheets download as Word documents.

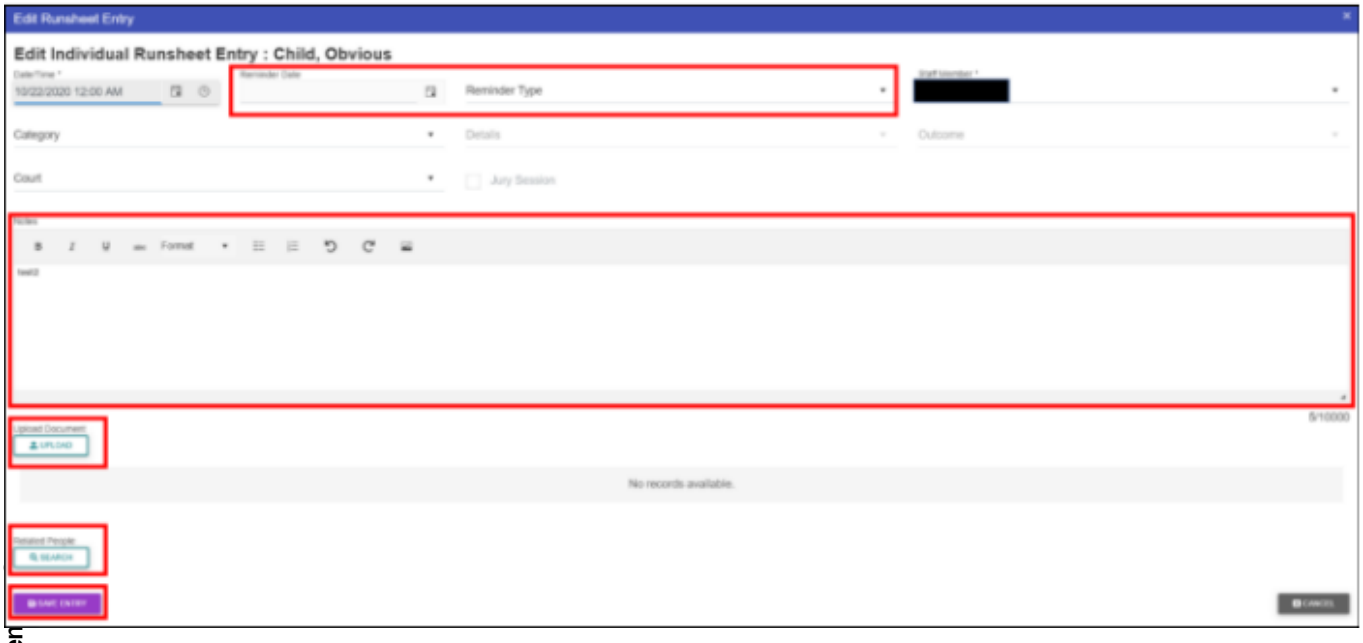
Runsheet Types

Person

A *Person Runsheet* is where notes specific to a *Person* are kept. These *Runsheet*s follow the *Person* regardless of the case.

A *Person Runsheet* is used for information specific or important to a *Person* but not directly related to a *Case*. For example, a *Person Runsheet* could be used to track information on a police officer or a DA useful for when they participate in future cases.

*Person Runsheet*s may be new to the Criminal Division staff, but have been used by other divisions for years.



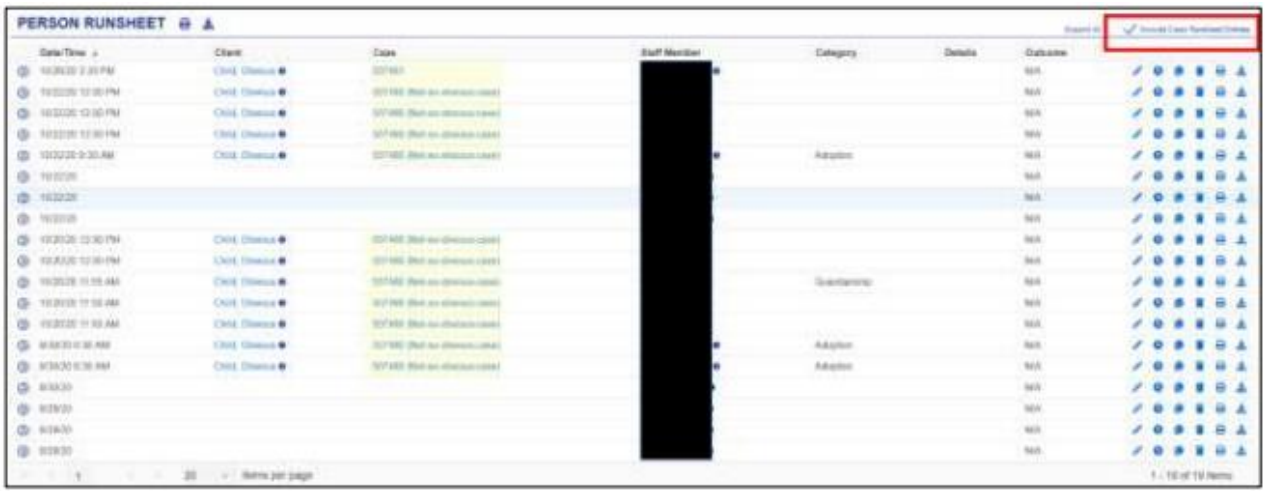
Note: You cannot add a *Person Runsheet* until you have completed creating a new *Person* first, for example, if you haven't saved a *Person* at least once, you cannot save a *Person Runsheet* to that *Person*.

When viewing a *Person Runsheets*, a unique feature is ability to show BOTH the *Person*'s *Runsheets* AND the *Runsheets* from any *Case* where they are a client.

To do this, select the *View All Entries* button in the section. In this instance, there are only seven *Person Runsheets*.

Then check the *Include Case Runsheet Entries* checkbox.

This will then show all related *Runsheets*, both *Person* and *Case*. Note that it now lists nineteen – seven *Person* and twelve *Case Runsheets*.

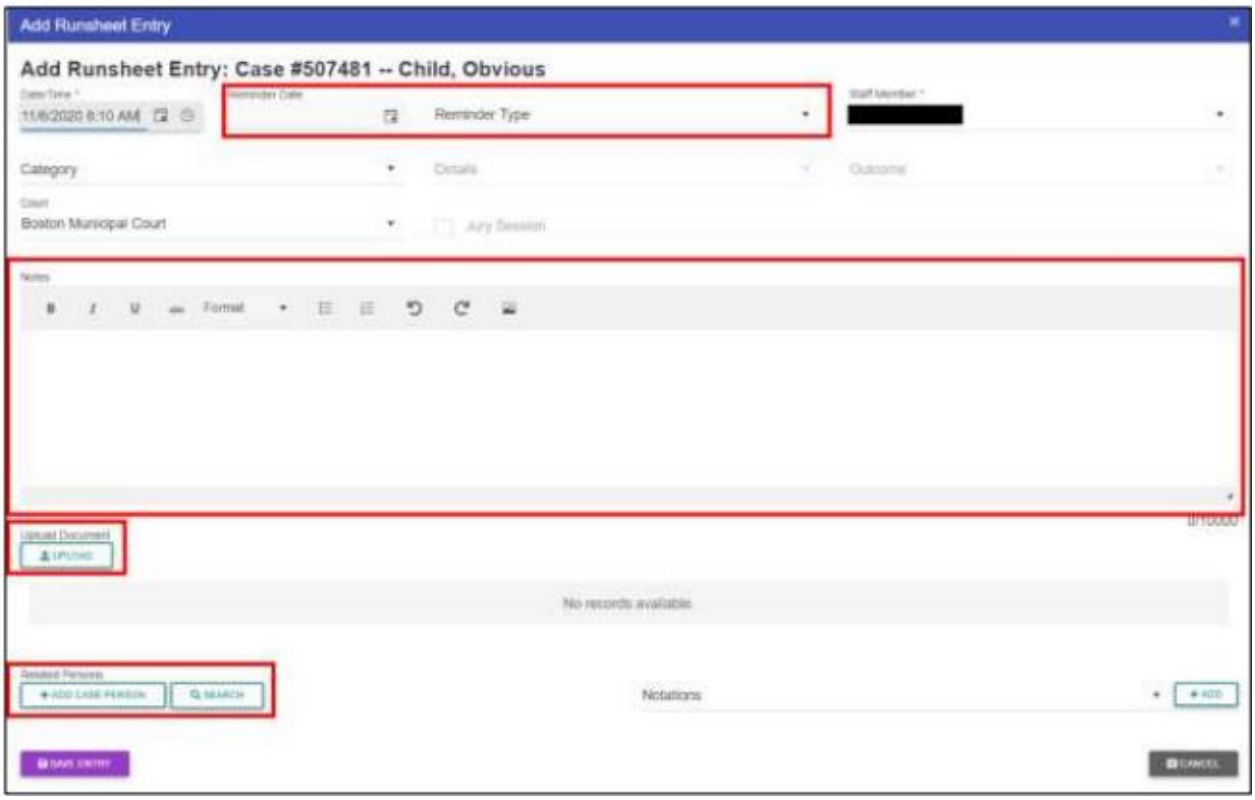


Criteria for showing *Case Runsheet* in with *Person Runsheet* is that the *Person* must be one of the below:

- The client on the *Case*
- A *Case Participant or*
- A *Related Person* on the *Runsheet*

Case

Case Runsheet **are the bread and butter of our work with clients. This is where notes on a specific** ***Case*** **can be written and stored for later reference.**



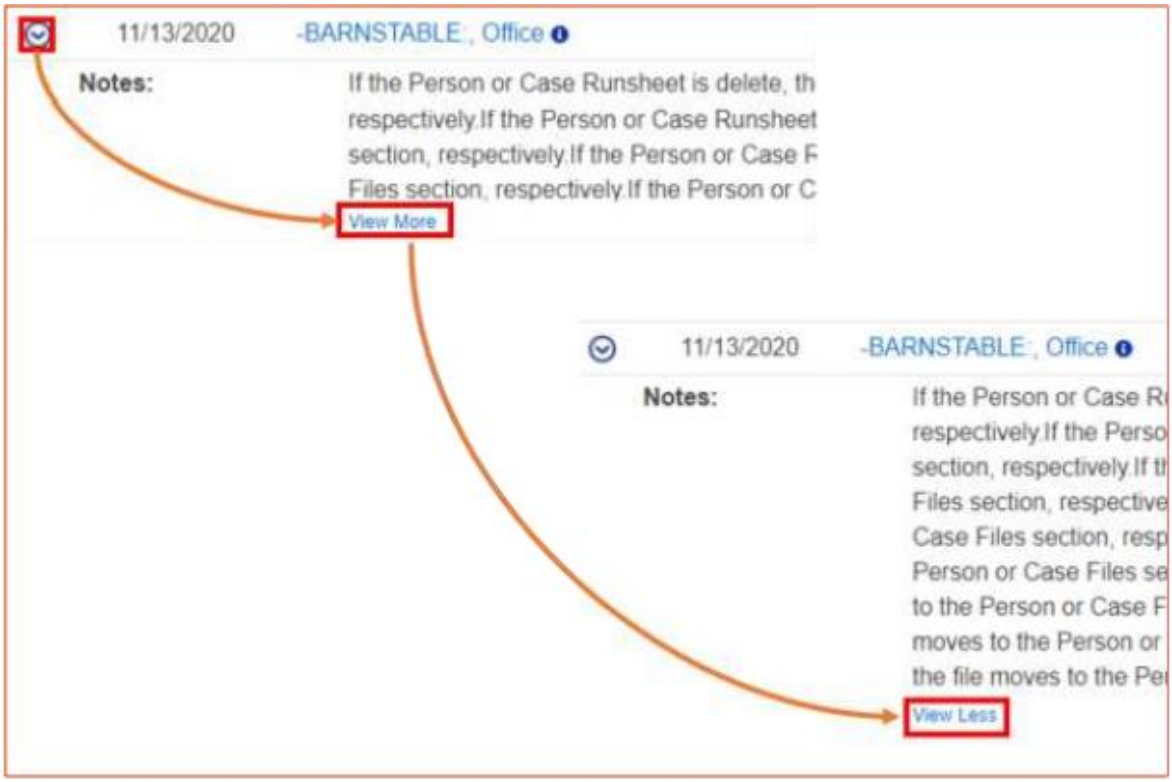
General

***Runsheet*s may be added or modified whether viewing or editing a *Person* or *Case*. Staff don't have to be in edit mode.**

By default, a maximum of ten *Runsheet*s are displayed in a *Person* or *Case*.

From the *Runsheet* section, you may do the following:

- ***Print/Download* – icons at the section title (*Runsheet*) downloads or prints ALL *Runsheet*s**
- ***Expand All* – expands all *Runsheet*s in the section to show more information**
- ***View all Entries* – only the most recent ten *Runsheet*s are shown. This shows <u>all</u> *Runsheet*s**
- ***Add Runsheet* – add a new *Runsheet***
- ***Expand* an entry – Clicking this icon shows more *Runsheet* information. Also, you may expand even more by selecting *View More* (*View Less* negates this). Examples, below.**



- Icons to the right of an individual *Runsheet* allow:
  - *Edit, History, Copy, Delete, Print, Download*
  - *Copy* – Duplicates a runsheet (and allows editing) to make adding repetitive *Runsheet* information easy

Fields

Person and *Case Runsheets* capture mostly the same data and have mostly the same functionality. Any field or document may be changed or deleted at a later date. Fields are:

- *Date/Time* – Auto-stamped when the *Runsheet* is created. May be modified
- *Reminder Date* – Reminder for an event or action
- *Reminder Type* – Method of contact, for example text, phone call, letter, social media, visit (This is how the attorney wishes to contact the client. Zelly will not generate a text or phone call.)
- *Staff Member* – Defaults to the person creating the entry, but it may be changed
- *Category* – Identify key activity of the runsheet (for example, SSA Action or Client Contact)
- *Details* – Some *Category* listings have sub-categories (*Details)* that may be selected
- *Outcome* – The result (if any) of the event recorded based on its *Category* and *Details*

Category	Details	Outcome
Collateral Contact	Community Engagement	General Communication
Collateral Contact	Community Engagement	After School/General-Facilitate New Act
Collateral Contact	Community Engagement	After School/General-Confirmed New A
Collateral Contact	Community Engagement	Community Service/Voluntary-Facilitate

- *Court* – If runsheet event happened at a court, which court
- *Jury Session* – Check this box if a jury were present
- *Notes* – A field for notes/comments/observation on the event(s) involved in this *Runsheet* **This is the key data entry field of a *Runsheet*.**
  - Text from almost any sources may be copied into *Notes* (Word, Excel, images, web pages, etc.)
  - Up to 10,000 characters or roughly 2000 words (the equivalent of 4 single-spaced, typed pages) are accepted
  - Basic formatting built-in: bold, italics, underline, bullets, etc.
  - To enlarge the visible area of the text box (so you don't have to scroll), drag it larger by pulling out the triangle in the lower right corner of the text box
- *Upload* button – Allows uploading any file 26 MB or smaller to a *Runsheet*.
- *Related Person: Search* – Find and link any *Person* related to this *Runsheet*
- *Related Person: Case Person* – Only on a *Case Runsheet,* adds a *Person* already assigned to the case to the *Runsheet*
- *Notations* – Only on a *Case Runsheet,* adds a notation to indicate actions like Adoption Plan Approved or Appealed from: Motion, etc. You may add multiple *Notations*

Search

You may search for keywords within a *Runsheet*. Search can be across multiple *Cases* or within a single *Case*. See previous Section: Cases Search for details. Below is a summary.

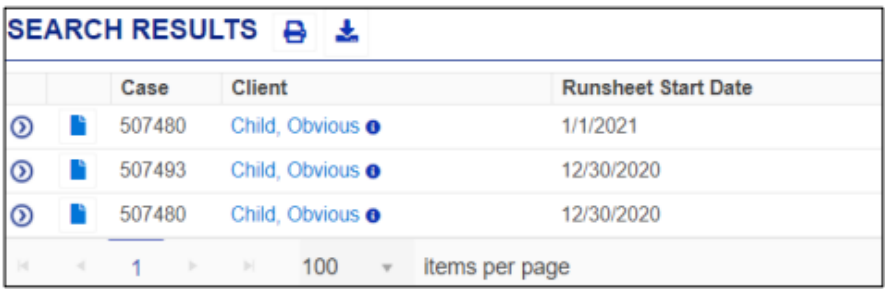
Across Multiple Cases

If you want to search for the word **Demographics** across all your open *Case Runsheets* (because you can't remember which *Case* contains the *Runsheet* you seek):

1. In the *Action Bar*, go to the *Cases* search icon and select *Case Runsheet Search*

2. Enter the keyword **Demographics**, and *Filter by My Open Cases* and click the *Search* button

3. In this example, the results return three *Runsheets* across two *Cases*. You can expand the *Runsheet* by clicking on the *Expand* icon to see the text

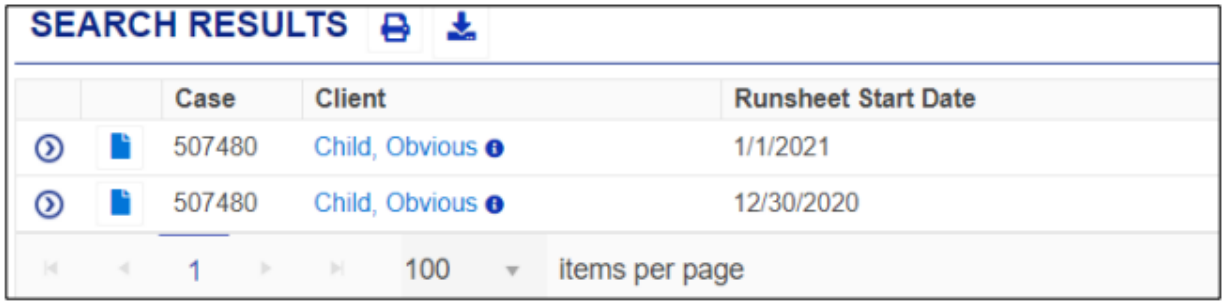


Within a Single Case

If you wish to search *Runsheets* in a single *Case*, follow Steps 1 and 2, above, but

- Leave *Filter by* on the default *All Cases*
- Enter the *Case* or *Docket #* in the appropriate search field
    - For example, if you only want to search *Runsheets* in *Case* 507580, you enter that *Case* number in the *Case* search field, in addition to **Demographics** in the *Keyword* field, then click the *Search* button

In this example, the results return two *Runsheets* for that *Case*. You can see either by clicking on the *Details* icon or expand the *Runsheet* by clicking on the *Expand* icon



Printing

General

Almost anything in a *Case* or *Person* may be printed.

Print can only occur in the viewing mode. Printing doesn't work when in edit mode in a *Case* or *Person*.

When printing, the item may be printed to a physical printer, like one attached to a work or home PC, or to PDF. When printing to a PDF, the PDF may later be emailed as an attachment to someone.

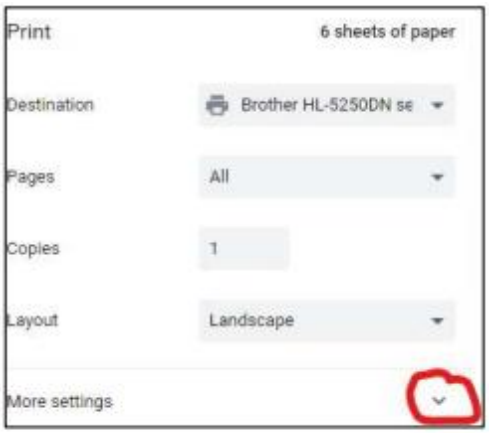
Anything with the print icon next to it may printed.

Print options may be found on the *Person* or *Case* page under the *Other Actions* OTHER ACTIONS buttons at the top-right.

Adjusting Print Size

If something is too cramped or too large or too small when printing, its size can be adjusted by clicking on the *More Settings* link in **your printing settings.**

Next select *Custom* from the *Scale* drop-down. Input the percent size reduction (in this example 50 means 50% reduction). The print preview will show the changes.

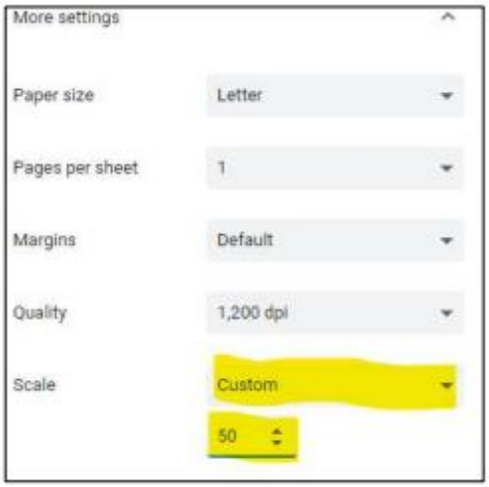


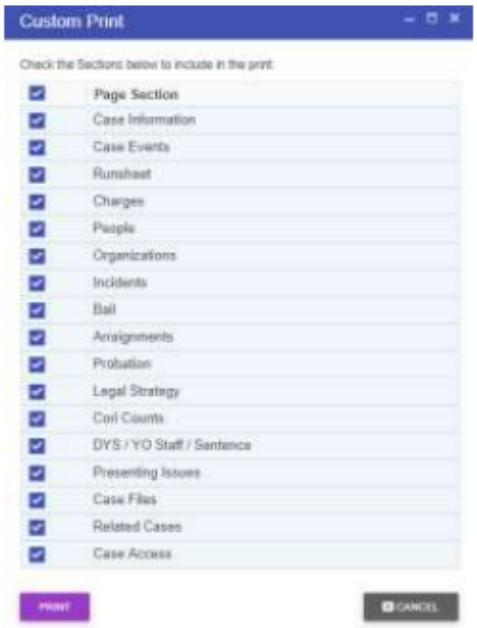
Printing from Other Actions Button

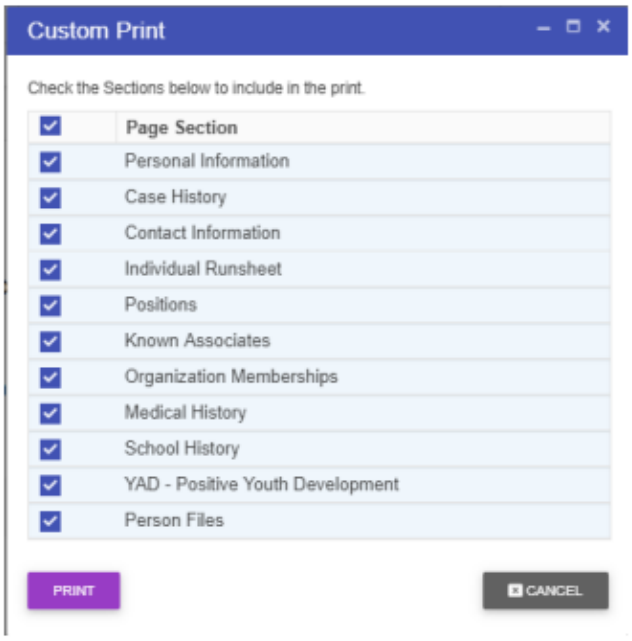
Both the *Case* page and the *Person* page allow printing from the Other Actions button on the top-right of each page.

There are two types of printing:

- Print *Case* or Print *Person* – This prints a hardcopy or PDF of the entire *Case* or *Person*
- Custom Print – Allows a selection of which *Sections* to print, examples **below**. Left is *Case*. Right is *Person*







Printing a Section or Sub-section or Row

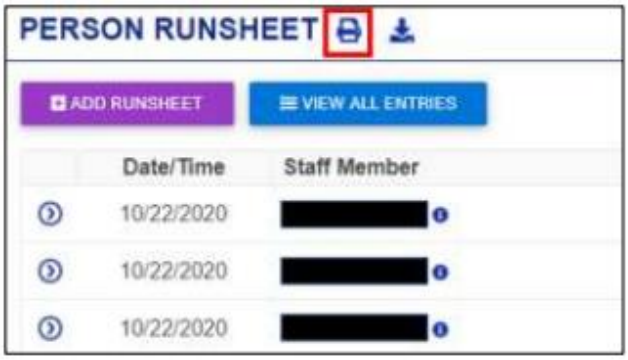
An **entire** *Section* or *Sub-section* or just a single *Row* may be printed (look for the *Print* icon).

Printing may be to a hard copy or print to a PDF for easier sharing.

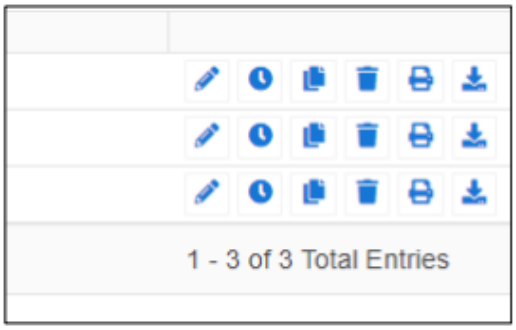
In the example, below, selecting the print icon for the *Birthdates Sub-section* prints both *Rows of* birthdates with their corresponding notes

Printing Runsheets

Printing a *Runsheet* (both *Case* and *Person*) is the only twist on printing. In the example below, clicking the print Icon next to the *Section* name (*Person Runsheet*) will print all three of the *Runsheet*s listed, including any notes they have.



In the same example, at the end of each *Row*, is a print icon. Clicking that will print just that <u>one</u> *Runsheet*.



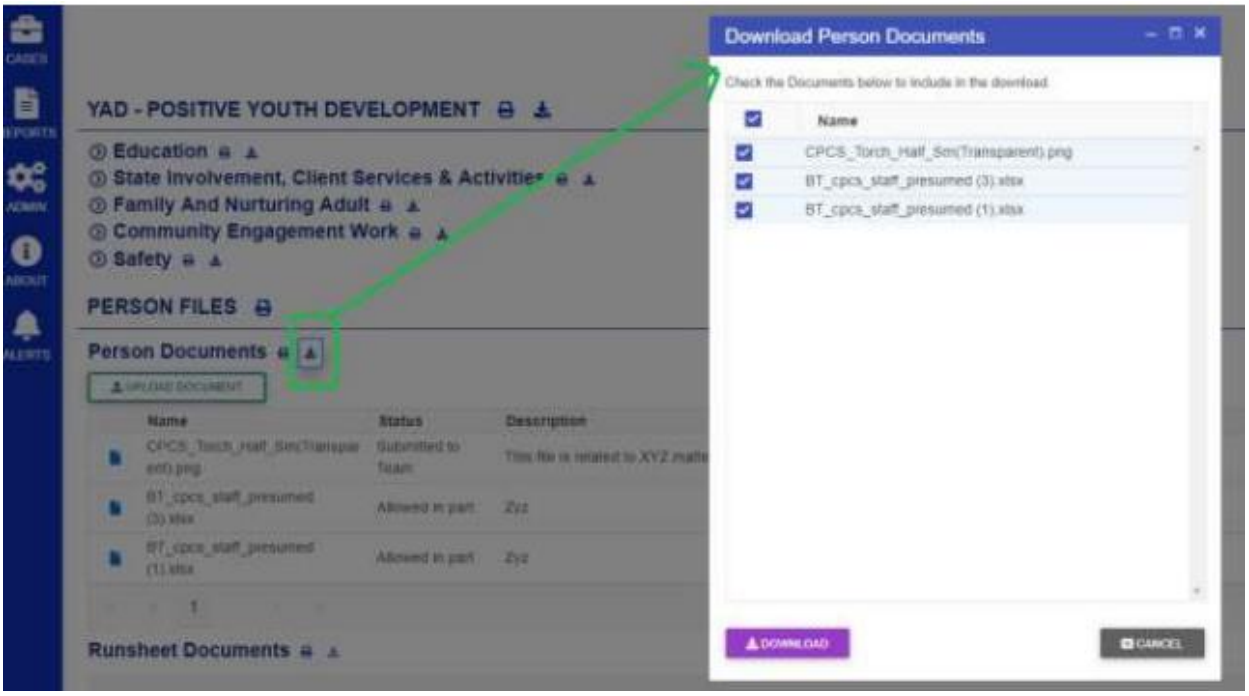
Downloading

Almost anything on a *Case* or *Person* page may be downloaded.

In general, this works very similarly to printing (see: Printing).

Downloads can only occur in view-only mode. Downloading does not work in edit mode on a *Case* or *Person*.

Anything with a download icon next to it may be downloaded. If you select the download icon next to the section title, you may download multiple documents at once.



Downloaded *Runsheets* are in Word format. All other downloads are in Excel. Files download in their native format.

Any *Case* or *Person* file may be downloaded.

Uploading a File

General

A file may be uploaded to the following:

- *Person*
- *Person Runsheet*
- *Case*
- *Case Runsheet*

If a *Runsheet* is deleted, the file(s) attached move to the *Person* or *Case Files* section, respectively. They aren't deleted with the *Runsheet*.

The maximum size of a file is 500MB.

Any type of file (Word, Excel, PowerPoint, PDF, scan, image, small video) may be uploaded (excluding .exe files for security reasons).

A file may be uploaded in either view-only or edit mode for a *Case* or *Person*.

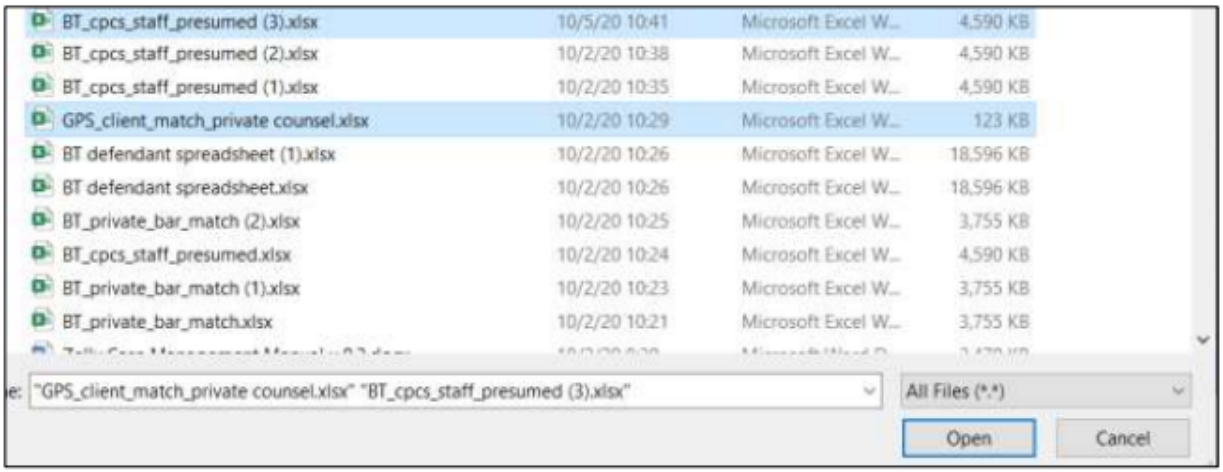
At the bottom of a *Person* and *Case* is a section titled *Files.*

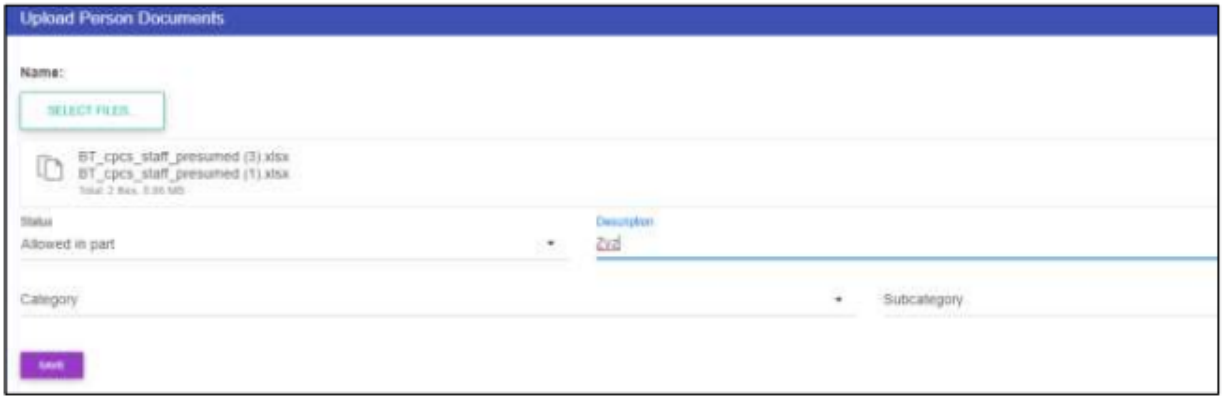
To upload a file, click the *Upload Document* button.

When a document is uploaded, there are a number of description options that may apply (see below). These options may be edited during upload or at a later date (when in edit-mode on a *Person* or *Case* by selecting the edit button next to the file). The *Status, Category, and Sub-Category* support **type-ahead**.

Multiple Files

Multiple files may be uploaded at once. If a batch upload is performed, the same description will be applied to all the files. After upload, you can edit or add the description individually. To select multiple files for upload, hold down the **control (CTRL)** key and click on the files you want. This multi-selection is standard Windows.





Name	Status	Description
BT_cpcs_staff_presumed (1).xlsx	Allowed in part	Zyz
BT_cpcs_staff_presumed (3).xlsx	Allowed in part	Zyz
CPCS_Torch_Half_Sm(Transparent).png	Submitted to Team	This file is related to XYZ matter and shouldn't be shared.

Subscribe to a Case or Person

If you subscribe to a case, it means you will receive emails or Zelly alerts regarding changes to that *Case*, for example: added or edited *Runsheet* or added charge or court dates. You may choose how to receive alerts.

An alert in the system is shown as a red number

on the *Alerts* button in the *Action Bar*. In this example, one alert is received and unread.

For emailed alerts, an email is sent to your inbox with basic information on the *Case* and what part of the *Case* was modified.

Runsheet Entry for Case 507480 has been updated

CPCS Zelly <cpcszellyprod@zellyalerts.com>
Fri 11/6/2020 16:13
To: [redacted]

Hello,

The following Case Runsheet entry information has been mailed to you.

Client Name: Obvious Child

Action Type: N/A

Action Details: N/A

Action Outcome: N/A

Activity Date: 11/6/2020

Assigned To: [redacted]

Notes: Original runsheet

Edited by to update runsheet

Third

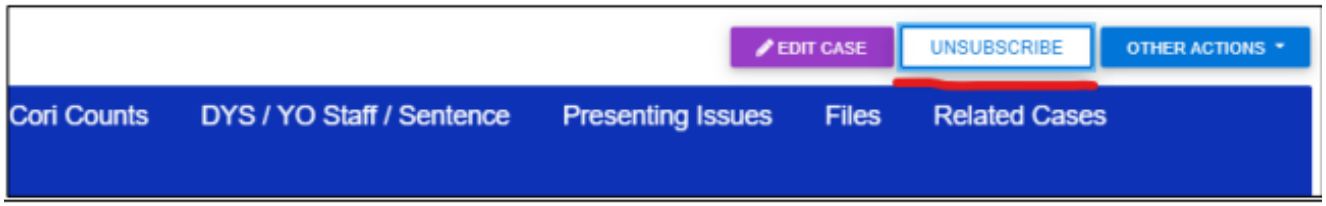
Referral Link: https://zelly.publiccounsel.net/Runsheet/507480?scrollEntryId=1751021

If you are an attorney or an SSA assigned to a case, you are automatically subscribed to alerts on *Case* changes. You may unsubscribe if you wish. (See Section: Manage Alert Preferences, below)

If you wish to subscribe to a *Case*, simply select the *Subscribe* button at the top-right of any case. To unsubscribe, click *Unsubscribe*.

Subscribe

Unsubscribe



To see how to adjust the alerts you receive, review **Alerts** section (next section) in this document.

Alerts

Alerts remind or notify you of a change to a *Case* (See: Subscribe to a Case) or events in a case.

You may modify what alerts you receive and how you are alerted from the *Alerts* icon on the *Action Bar*. The icon also shows how many alerts you have to review (in this example, one).

Click the *Alerts* icon to

- View most recent alerts (A)
- View all alerts (B)
- Manage alerting preferences (C)

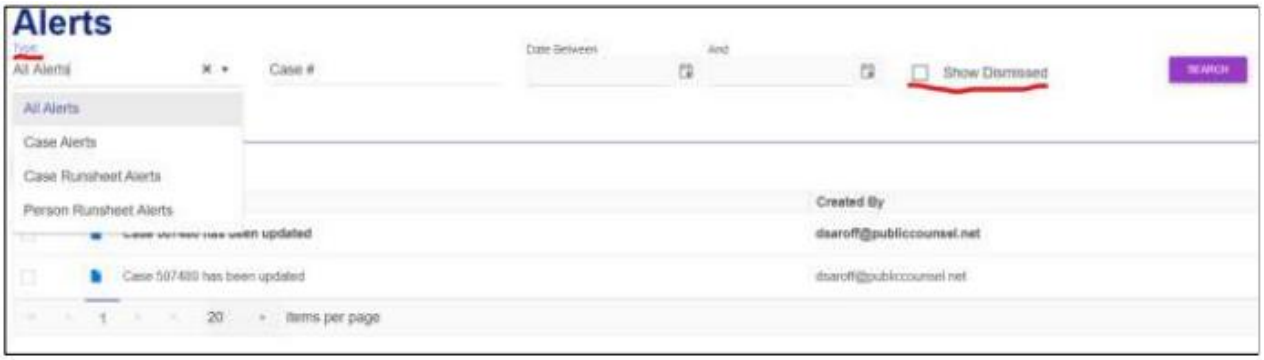
Recent Alerts (A)

Shows you the ten most recent *alerts* that haven't been dismissed. Bold, if they are unread. You may dismiss *alerts* you no longer wish to see by using *View All Alerts.* In the example above, there are only three *alerts* with the top one being unread (bold).

View all Alerts (B)

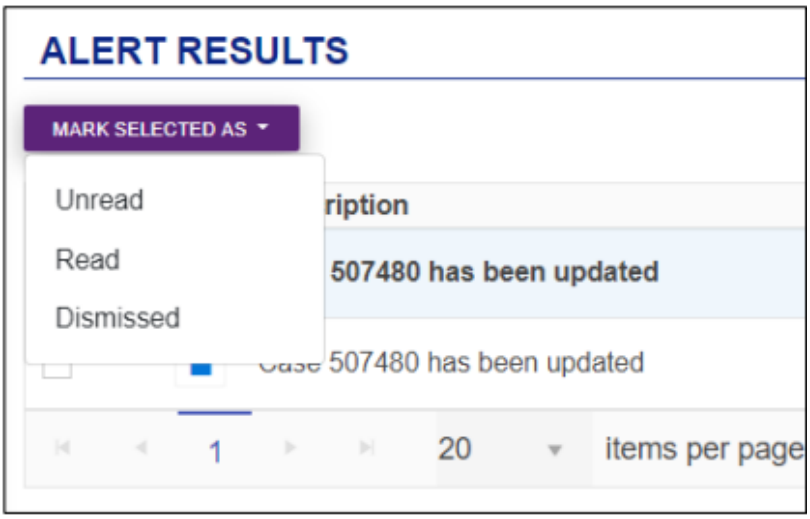
View all Alerts displays all *alerts*, read or not, that haven't been dismissed **and lets you manage** each *alert* (mark as read/unread or dismiss). You may filter or search for *alerts* by:

- *Type* – Shows *All Alerts*, *Case Alerts*, *Case Runsheet Alerts* or *Person Runsheet Alerts* (below)
- *Case #* - Only *alerts* for a specific case number
- *Date Start* and *Date End* – Find *alerts* in a specific date range
- *Show Dismissed* – When you *Dismiss* an *alert*, it disappears. Checking the *Show Dismissed* checkbox and selecting the *Search* button will show all your dismissed *alerts* (below)



Change Alert Status (C)

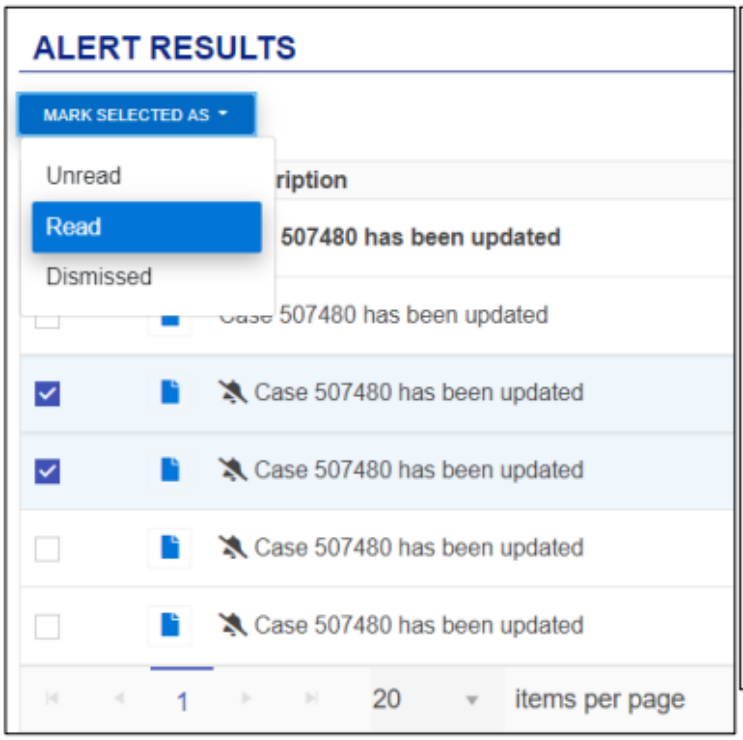
The *Alerts Results* acts like an email inbox. It shows all your non-dismissed *Alerts*. Similar to an email inbox, you may mark an *Alert* as *Read*, *Unread* or *Dismissed*. When it is *Dismissed*, it disappears from you're *Alerts*, but can still be seen when clicking the *Show Dismissed* checkbox (see above).

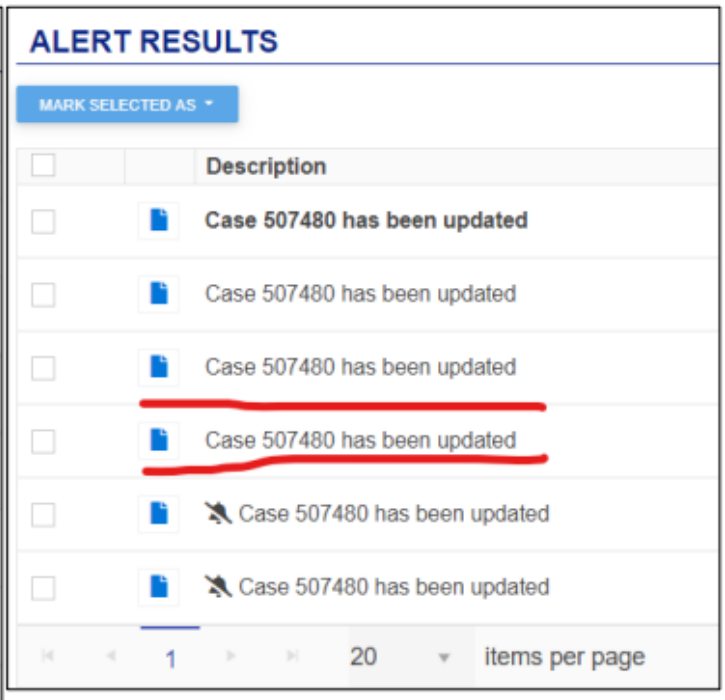


To change an *Alert's* status, simply click the checkbox next to its name and pick the new status from the *Mark Selected As* drop-down.

When you select *Dismissed* it will disappear.

To restore an *Alert*(s), find the *Dismissed Alert* by selecting the *Show Dismissed* checkbox and clicking the *Search* button. Then click the *alert's* checkbox and select either *Unread* or *Read* from the *Mark Selected As* checkbox to restore it. A dismissed *Alert* has a bell with a slash through it.



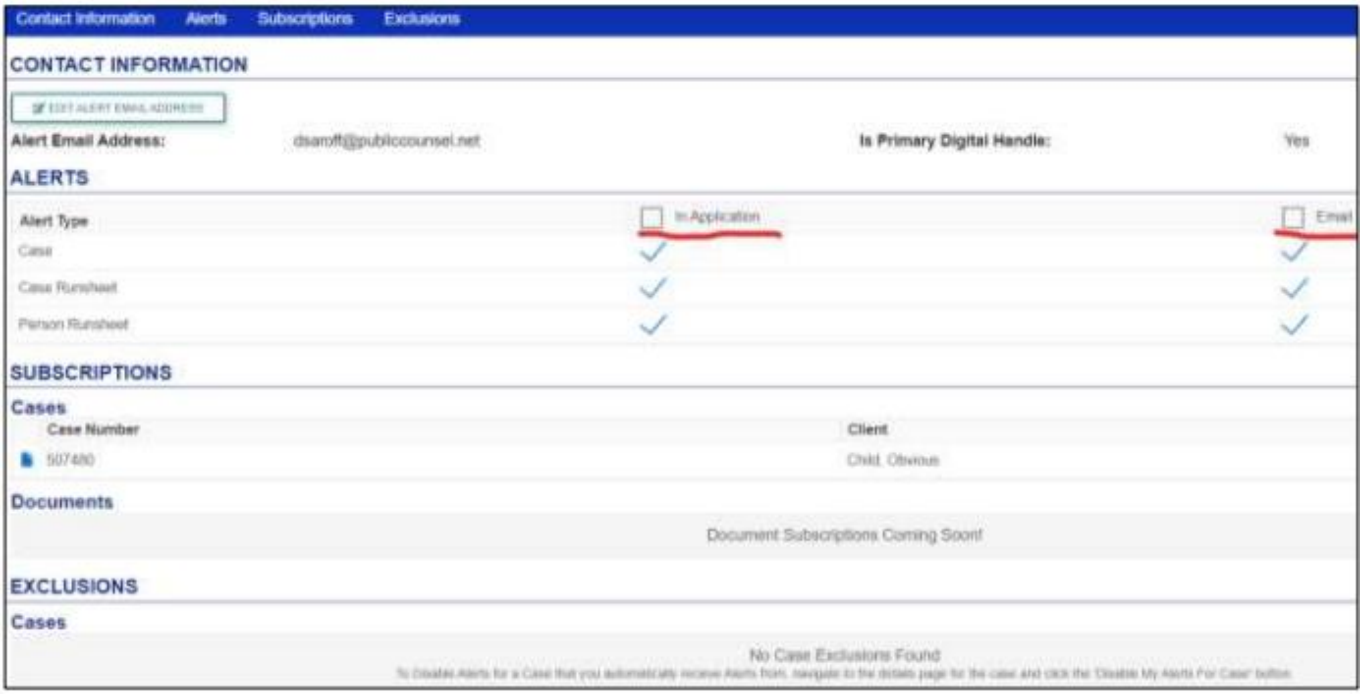


Manage Alert Preferences

This controls HOW you are being alerted as versus managing specific *Alerts*. For example, it allows you to select *Cases* where you are alerted and whether the *Alert* is in Zelly (the *Alert* icon in the *Action Bar*) or if it sends you an email or both. So, this area allows you to:

- Change the email address where you receive *Alerts* (must be a CPCS email address)
- Determine whether you want to be alerted in Zelly (*In Application* checkbox) and/or via email (*Email* checkbox).
    - You may choose different selections depending on whether it is a *Case*, *Case Runsheet*, or a *Person Runsheet*
- See your current *Alert* subscriptions (*Subscriptions*)

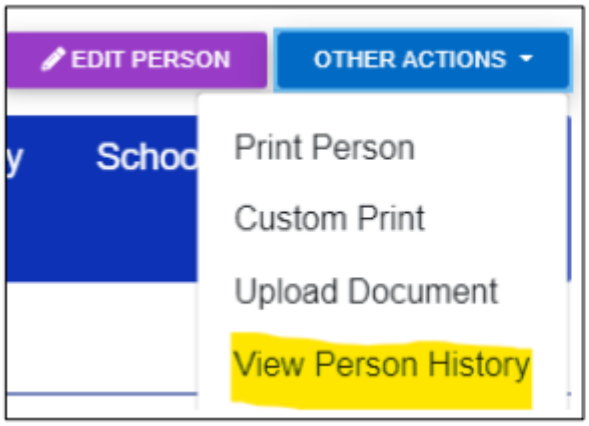
- View which *Cases* where you chose to not be *Alerted* (*Exclusions*)

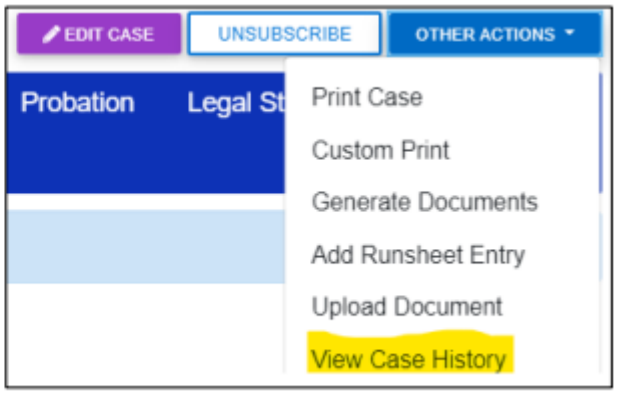


History

History is a very powerful tool that shows changes made to an entire *Case* or *Person* or a specific item within a *Case* or *Person*.

History for an **entire** *Case* or *Person* is found under the *Other Actions* menu button on the top-right of a *Case* or *Person* page.





Clicking the clock icon next to anything shows that item's *History*.

History shows what has been added or deleted, by whom, type of change, and on what date.

For example, in *Case Professional* it shows when a professional was added and removed from a *Case* and by whom. In this example, the *Person* was added as the Primary Attorney on 9/29/20 (*Assigned Date*) and removed (*Removed Date*) on 9/30/20 at 1:20:22 PM (*Valid From*). However, the same day (1:24:37 PM) they were restored as Primary Attorney (*Valid To*).

Case Professionals

Name	Role	Relationship	Associated With	Effort	Assigned Date	Removed Date	Last Update User	Valid From	Valid To	Action
[redacted]	Primary Attorney				9/29/2020		[redacted]	10/26/2020 6:34:41 PM		Current
[redacted]	Primary Attorney				9/29/2020		[redacted]	9/30/2020 1:24:37 PM		Current
[redacted]	Primary Attorney				9/30/2020		[redacted]	9/30/2020 1:20:22 PM		Current
[redacted]	Primary Attorney				9/29/2020	9/30/2020	[redacted]	9/30/2020 1:20:22 PM	9/30/2020 1:24:37 PM	Updated
[redacted]	SW/SSA			Low	9/29/2020		[redacted]	9/29/2020 7:41:52 PM		Current
[redacted]	Investigator				9/29/2020		[redacted]	9/29/2020 7:41:52 PM		Current
[redacted]	Investigator				9/29/2020		[redacted]	9/29/2020 6:25:33 PM		Current
[redacted]	Primary Attorney				9/29/2020		[redacted]	9/29/2020 5:52:45 PM	9/30/2020 1:20:22 PM	Original
[redacted]	Primary Attorney				9/29/2020	9/29/2020	[redacted]	9/29/2020 5:52:45 PM	10/26/2020 6:34:41 PM	Updated
[redacted]	Primary Attorney				9/29/2020		[redacted]	9/29/2020 5:52:28 PM	9/29/2020 5:52:45 PM	Original

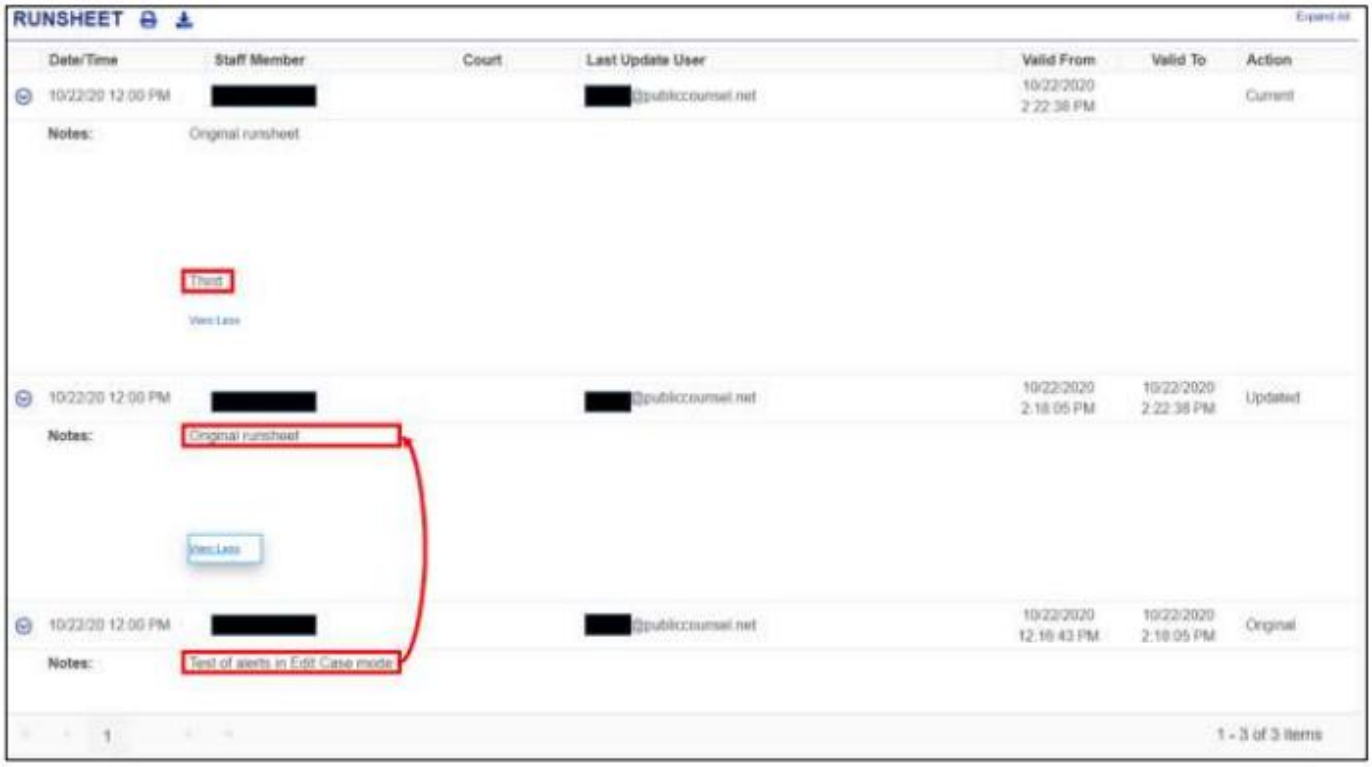
1 - 10 of 10 items

When a *Runsheet* is edited and changed, the versions are displayed and who made the change(s).

In the example below, the *Runsheet* was created and then edited twice (*Action* column). The versions are listed in reverse chronological order (oldest at the bottom; newest at the top).

It shows who updated it (*Last Update User*) and when it was updated or created (*Valid From*) and when it was superseded by a later update (*Valid To*).

The red boxes and arrows are used to illustrate text changes for the purposes of this Guide. You will not see them in the tool.



In this example, the original note text was “Test of alerts in Edit Case mode.” In the next version, this text was deleted and replaced with text reading “Original runsheet.” In the final version, the word “Third” was added to the *Runsheet*.

Automated Case Opening

Historically, the Criminal Division (PDD), Children and Family Law Division (CAFL), MHLD, Youth Advocacy Division (YAD), Ed Law, and Conflict have tools that allow semi-automated creation of key case document templates. Those capabilities are available in Zelly.

Depending on whether it is a CAFL, Criminal, MHLD, YAD, Ed Law, or Conflict *Case*, different document will be created. For CAFL *Cases*, nineteen *Case* document templates are created, for Criminal fifteen, for MHLD five, for YAD eighteen, for Ed Law eighteen, and for Conflict fifteen. These are based on the current automated case opening documents. See Appendix for document listings.

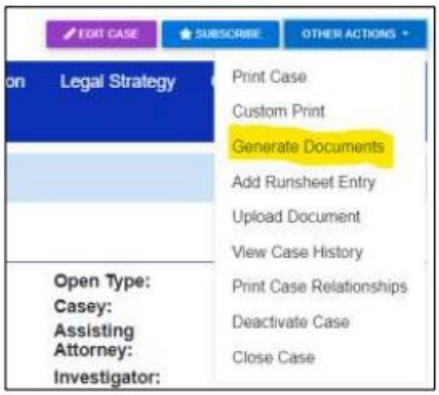
General

Regardless of *Case* type, when the automated documents are created, they are stored in the *Files* section at the end of a *Case*. They may be downloaded for editing and then re-uploaded when edited to replace the existing template. Their descriptive attributes may be modified. For more information on *Uploading* or *Downloading* a document, see their respective sections in this guide.

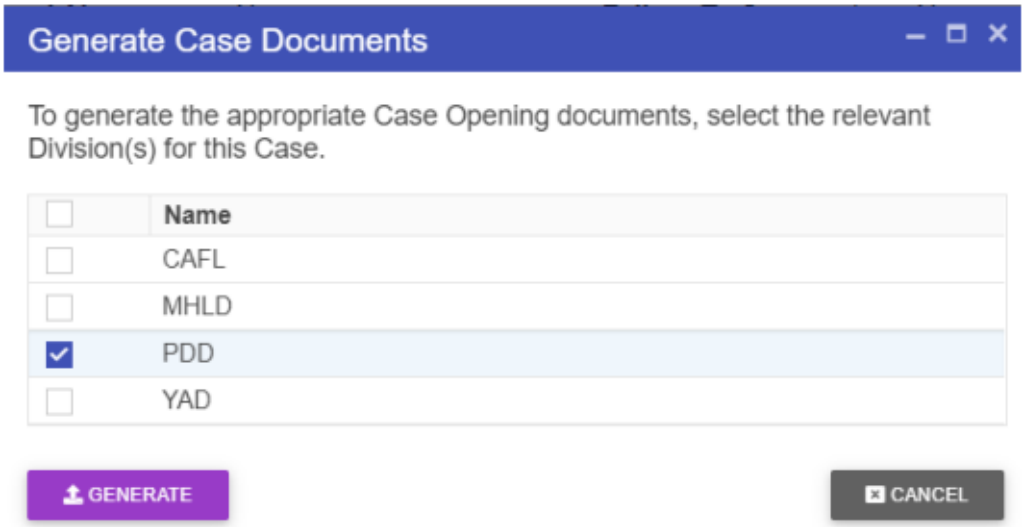
Activating Automated Case Opening

When in view-only mode in a *Case*, select the *Other Actions* button in the top-right and pick *Generate Documents*.

Note: If you are in edit-mode on a *Case*, the *Other Actions* button is not visible.

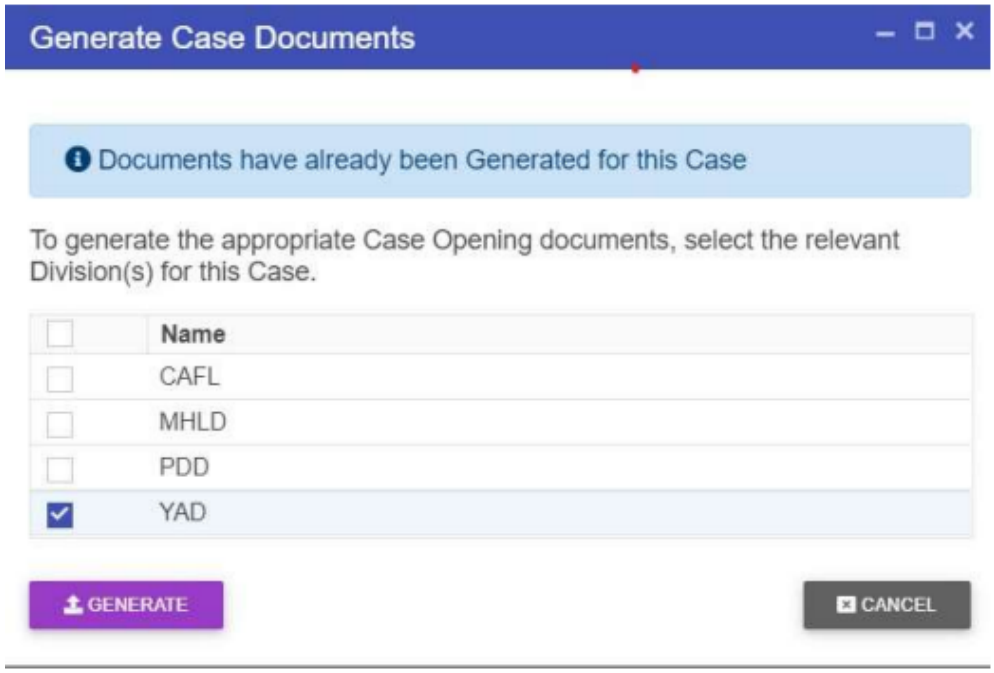


You will receive a box asking for confirmation. It lists out the options (by Division/case-type) for the generated documents based on your selection. If it selects a type that is not the Division/case-type you wish, you may change it by unchecking the incorrect checkbox and selecting the correct one.

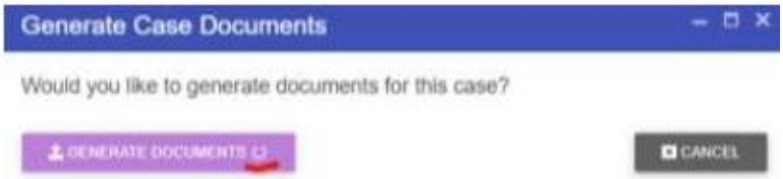


If *Case* opening documents were previously created, it will alert you to that fact. You may still generate the documents again.

NOTE: This "re-generation" will over-write any documents with the same name.



When you select the *Generate Documents* button, the notification box will go gray and a circling counter will spin in the button indicating it is creating the documents. This will take a few seconds.



The screen will automatically jump to the *Files* section where you will see the *Generated Documents*. They are flagged with the *Description* "*Generated Documents*."

	Name	Status	Last Updated By	Last Updated At	Version	Description	Cat
	ObviousChild 507482 (running sheet) docx	Other	dsaroff@publiccounsel.net	10/27/2020	1	Generated Document	
	Blank Client Letter docx	Other	dsaroff@publiccounsel.net	10/27/2020	1	Generated Document	
	Closing Sheet docx	Other	dsaroff@publiccounsel.net	10/27/2020	1	Generated Document	
	CORI Request docx	Other	dsaroff@publiccounsel.net	10/27/2020	1	Generated Document	
	Generic_Motion docx	Other	dsaroff@publiccounsel.net	10/27/2020	1	Generated Document	
	IIU Referral docx	Other	dsaroff@publiccounsel.net	10/27/2020	1	Generated Document	
	Investigation Request docx	Other	dsaroff@publiccounsel.net	10/27/2020	1	Generated Document	
	Open Letter (English) docx	Other	dsaroff@publiccounsel.net	10/27/2020	1	Generated Document	
	Open Letter (in custody English) docx	Other	dsaroff@publiccounsel.net	10/27/2020	1	Generated Document	
	Open Letter (in custody Spanish) docx	Other	dsaroff@publiccounsel.net	10/27/2020	1	Generated Document	

To download this documents in a group, see the section **Downloading**.

Closing a Case

General

Even after closing a case, case files may still be uploaded, runsheets added and edited, the case may still be edited or modified.

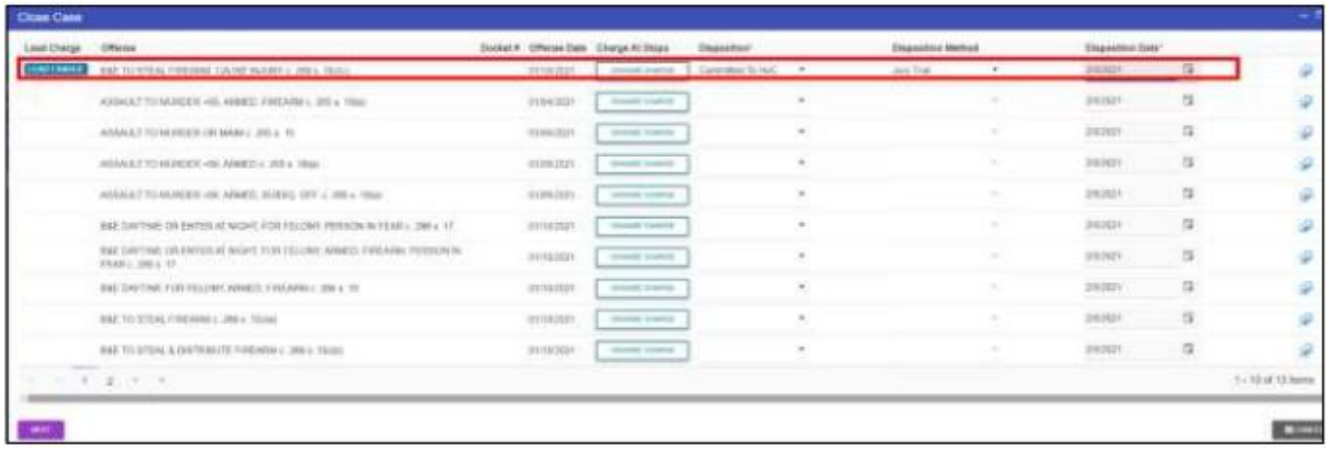
When a case is closed, the *Closing Date* field in the *Case Information* section has the date it was closed entered.

Closing

To close a case, when in view-only mode in a *Case*, select the *Other Actions* button in the top-right and pick *Close Case*.

Note: If you are in edit-mode on a *Case*, the *Other Actions* button is not visible.

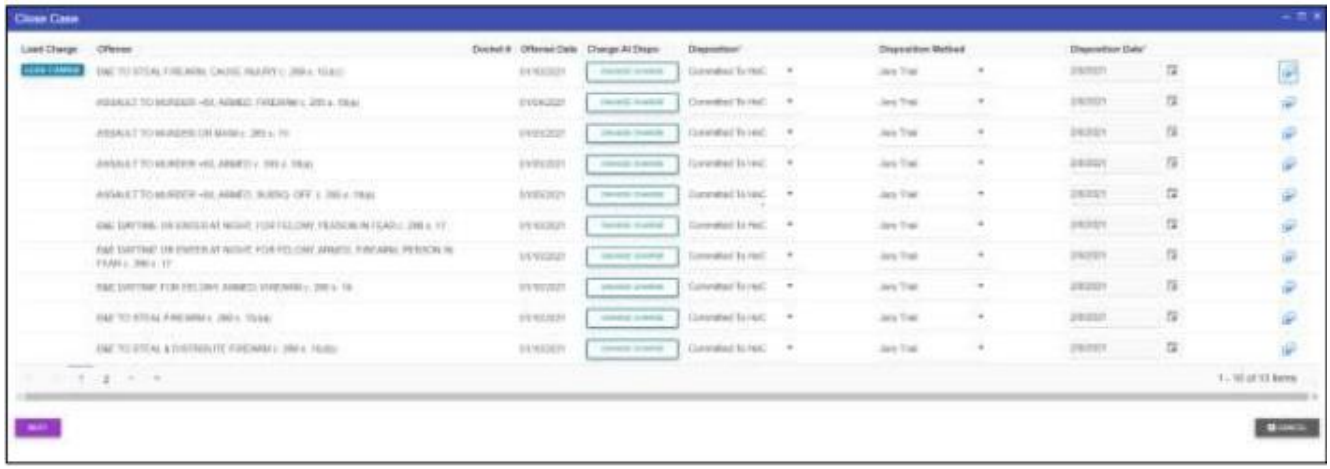
Selecting *Case Close* will pop-up a window listing the charges. Here you may change charges, indicate for each charge it's *Disposition*, *Disposition Method, Disposition Date*.



Copy the Same Disposition to Multiple Charges

If you have a common *Disposition*, *Disposition Method, Disposition Date* in one charge that you want to apply to other charges (rather than input them manually), you may use the *Copy Down* icon at the end of a charge row to copy the information to other charges below it.

In the example above, if I used the *Copy Down* function with the **Lead Charge**, it copies the disposition data to all the charges below it. This saves time and entry.

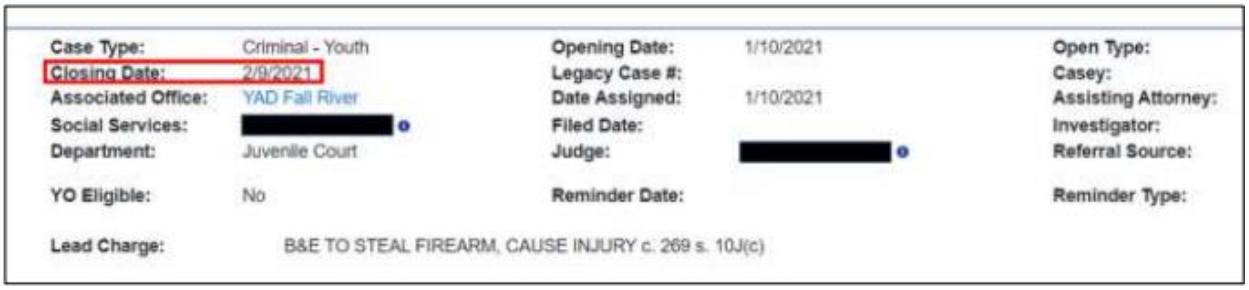


When done with the disposition on the charges, select the *Next* button and another window pops up that allows you very (and change) the *Closing Judge*, *Closing Attorney*, and *Closing Date*.

Select the *Next Button* to continue.

You then may add final notes to the case before you select the *Close Case* button.

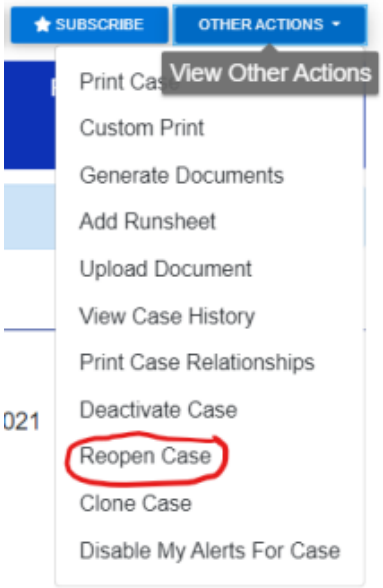
Once you select the *Close Case* button, the case is closed and the *Closing Date* in the *Case Information* section is now updated marking the case as closed.



Re-opening a Case

Sometimes a *Case* needs to be re-opened.

To re-open a *Case*, click the *Other Actions* button and select the *Reopen Case* link. It will re-open the



Case and it will auto-populate a re-opening date.

For a re-opened *Case*, when it is later closed, the process illustrated above is followed with one exception: the charges will list the dispositions previously selected before the *Case* was re-opened. If they have changed since re-opening, they will need to be deleted and re-entered.

Miscellaneous

Unique Identifier for a Person or a Case and Legacy IDs

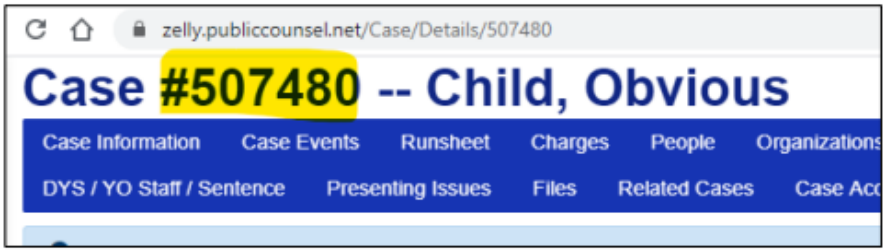
All *Cases* or *Persons* in Zelly have a unique, numerical number generated by the system. This number can be used to quickly find a *Case* or used to help with troubleshooting a particular issue with a *Case* or *Person*.

For a *Person*, the number is found in the web address for the *Person*.

For a *Case*, the number is found in the web address for the *Case* or next to the *Case* name or in any search field where the *Case* is listed or in the *Case History* section of the *Person* page.

Web address

***Case* name**



Search field

Person, Case History Section

CASE HISTORY

	Case	Case Type	Docket #	Role
	507480	CRA - [redacted]		Client

Legacy IDs for Case or Person

If the *Person* or *Case* was imported from one of the old case management systems (Casey, TRIS, CMS), the old, legacy identification will be listed for referencing. You may also use legacy *Case* numbers in a *Case Search*.

Person

Person Details

Birthplace:	boston, ma	Gender:	Female	Preferred Pronoun:		Status:	
Age:		SSN:		DOB:		Race:	
Ethnicity:		Country Of Origin:	United States	Immigration Status:		Needs Interpreter:	No
Height:		Weight:		Weight Range:		PCF:	
BBO:		A#:		Military Service/Veteran:	No	Has Disability:	No
Last Grade Completed:		# of Children:		Legacy Person #:			
Notes:							

Case

CASE INFORMATION

Client:	[redacted]	Case Type:	Criminal	Opening Date:	2/17/2015	Open Type:	
Transfer Date:		Closing Date:	4/7/2015	Legacy Case #:	FY2015-[redacted]- [redacted] CASEY)	Casey:	
Attorney Assigned:	Assign	Associated Office:	Roxbury-District	Date Assigned:		Assisting Attorney:	
Prosecutor:		Social Worker:		Filed Date:		Investigator:	
Court:	Roxbury District Court	Department:	District Court	Judge:		Referral Source:	
Prior Client:	No	YO Eligible:	No	Reminder Date:		Reminder Type:	
Case Name:							
Docket #:	[redacted]	Lead Charge:	ASSAULT W/DANGEROUS WEAPON c. 265 s. 15B(b)				
Note:							

Case Access

Case Access is used to provide access to a case for someone who might not normally have access (e.g., someone from a different division or not in your office). It lets you assign them a security role for this one case (for example, you want someone to be able to read, but not edit the case or you are borrowing a social worker from another division so you wish to add them).

This is only used on a one-off basis. If this person needs to have access to all cases in an office where they formerly didn't (for example, an investigator has an additional office added to their

coverage), this would be a request to IT and IT would give the investigator access to their new office. Such requests must come from the office AIC or Managing Director.

Adding New Charge Codes

New charge codes may only be requested by the division deputy OR a designee of the division deputy. IT must be notified which person in each division is responsible for finalizing the language and approving any new or modified charge code. IT will not update the system unless an authorized party agrees and supplies the language. If requested by a non-authorized party, IT will ask the person to make the request through the relevant deputy.

Cloning a Case

If you wish to reuse basic information about a *Case* for another *Case*, you may do so by using the *Clone* function.

Cloning copies a *Case* and some (not all) of its information to a new *Case* number. It copies all data except the following:

- *Runsheet* entries and *Case Events* (and any associated documents)
- *Case* documents
- *Closing* information (closing date, closing note, closing attorney, closing judge, disposition information, sentencing information)
- Re-opening Date, Transfer Date, Filed Date
- Reminder information (date and type)
- Previous Professionals
- Arraignment Dates

Further, the following will be modified or added:

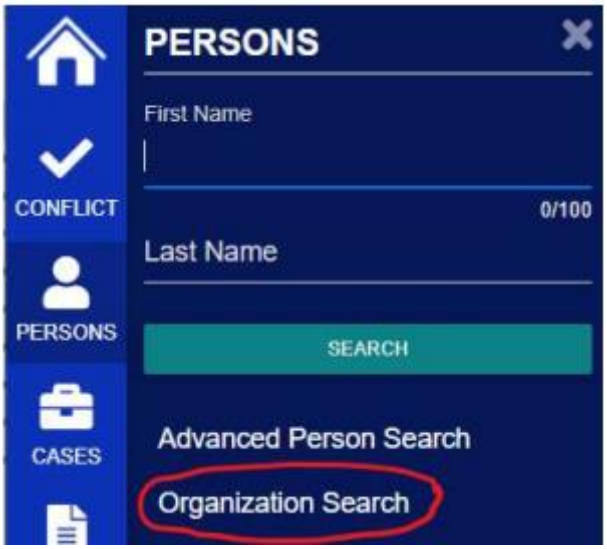
- The *Case Opening* and *Case Professional Assignment Dates* will get reset (to the cloning date)
- The parent *Case* and the cloned *Case* will be linked in the *Related Cases* section for easy reference

Creating New Organizations

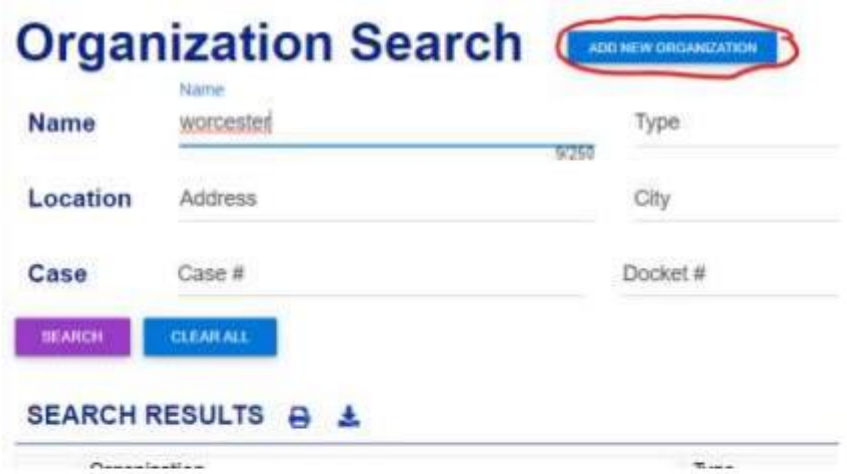
Organizations are an entities or groupies engaged with the *person* (e.g., hospital, halfway house, shelter).

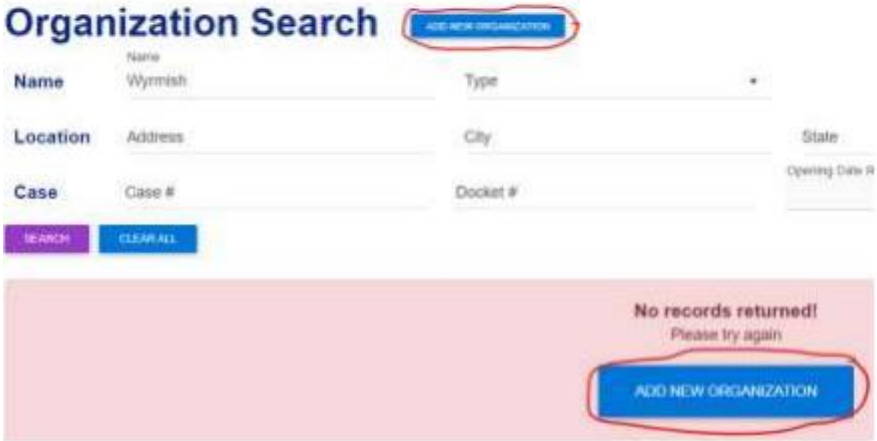
Organizations can be added. To add a new *Organization*, you must search for one. Once you have searched, regardless whether results were found or not, you may then add a new *Organization*.

To create an *Organization*, go to *Person Search* in the *Action Bar*, and select *Organization Search*.



Search for the *Organization* name. If it exists, use it. Otherwise, use the *Add New Organization* button (whether you have results (top image) but none of them are correct or no results are found (bottom image) to create the new *Organization.*





Duplicate People - Merging

Automation was used to review duplicate people entered into the old systems and merge them as appropriate. HOWEVER, when there was insufficient data to determine whether individuals were duplicates, they were not automatically merged.

If you find duplicates, email zelly@publiccounsel.net and list the duplicate people that need to be merged. Once confirmed, the people will be merged.

Reports

General

There are many different reports in Zelly. You will only see the reports that you have access to see.

If there is a bug in a report or you wish to have a report created, email zelly@publiccounsel.net

Requesting Access to a Report

If you don't see a report you believe you should be able to access, email zelly@publiccounsel.net to request access to the form.

Function

There is a short video that demonstrates how to use reports. It is recommended watching. There is also a User Guide available for the reports: Report User Guide (PDF). Information on each specific report can be found in the guide.

All reports work in the same manner with a similar user interface. Reports may be found from the *Action Bar Reports* icon on the left of all pages.

Select the report you wish to view (in this example, *Attorney Case Load*).

There are a number of elements that are consistent across all reports.

- All reports list the former name and case management system they came from
- All column headers are sortable
- Hovering your cursor over (or clicking) data or a table reveals icons. The most important icon let's you export the date (shown later)
- The data can be exported for analysis, sharing and printing as a Excel document
- There is a date range that may be modified

For things like office location, attorney name, division, etc., you can scroll through a list to select OR you can use search. When you click into these fields, you will see a *Search* field above the list. Type in what you wish found. In this example it is the attorney Saroff. Select the radio button and it will show you all of this person's *Cases*

Date

Most dates have a range. The date range can be modified by either directly entering a new date in the range or picking from the calendar drop-down.

If you hover over the date, you will note an eraser icon appears. Clicking on this will delete the current dates and set it to a very broad date range.

Export

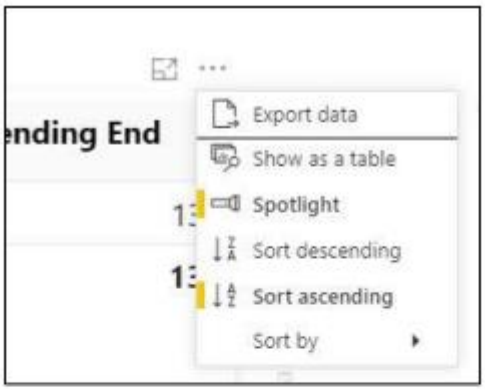
You can export data from the reports in addition to viewing them in Zelly. When you export it, exports to Excel. Currently, you may only print from Excel. The report printing function does not work correctly.

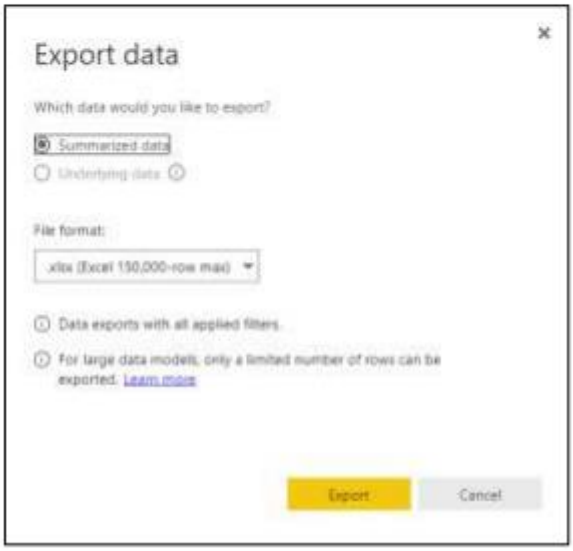
To export the data either hover over or click into the table whose data you wish to export. When you do you will see the *Report Data Menu* icon (also called the "Overflow menu").

Attorney Name	Pending Start	Total Assigned	Transfer In	Transfer Out	Closed	Pending End
Saroff, Daniel		13	2	2		13
Total		**13**	**2**	**2**		**13**

Note: This option is unavailable in *Focus Mode*.

Clicking the icon lists a number of options. The most important is *Export data*. Select this and it will open all the data in Excel. From Excel, you may manipulate it or print it.





Depending on the amount of data, it may take a few minutes.

Focus Mode

If you hover over data or a table, you will see the *Focus Mode* icon.

Case #	Old Case #	Client Name	Case Type	Case Open Date	Case Close Date
521600		Child, Obvious	Criminal	04/13/2021	
521611		Child, Obvious	Criminal	04/20/2021	
521612		Child, Obvious	CRA - Truant	04/20/2021	
521613		Child, Obvious	FELIZ	04/20/2021	
521614		Child, Obvious	Criminal	04/20/2021	
521615		Child, Obvious	Criminal	04/20/2021	
521616		Child, Obvious	Criminal	04/20/2021	

Clicking the *Focus Mode* icon will open the table or data on a new page where it is the entire focus (no other report elements are shown).

Back to report

Case #	Old Case #	Client Name	Case Type	Case Open Date	Case Close Date
521600		Child, Obvious	Criminal	04/13/2021	
521611		Child, Obvious	Criminal	04/20/2021	
521612		Child, Obvious	CRA - Truant	04/20/2021	
521613		Child, Obvious	FELIZ	04/20/2021	
521614		Child, Obvious	Criminal	04/20/2021	
521615		Child, Obvious	Criminal	04/20/2021	
521616		Child, Obvious	Criminal	04/20/2021	
521617		Child, Obvious	Criminal	04/20/2021	
521618		Child, Obvious	Criminal	04/20/2021	
521619		Child, Obvious	Criminal	04/20/2021	
521624		Child, Obvious	Criminal	04/21/2021	
521625		Child, Obvious	Criminal	04/21/2021	
521626		Child, Obvious	Criminal	04/21/2021	

Printing

Currently the *Print* button does not work correctly. To print, you will need to choose *Export* and then print from Excel.

Appendix

Icons

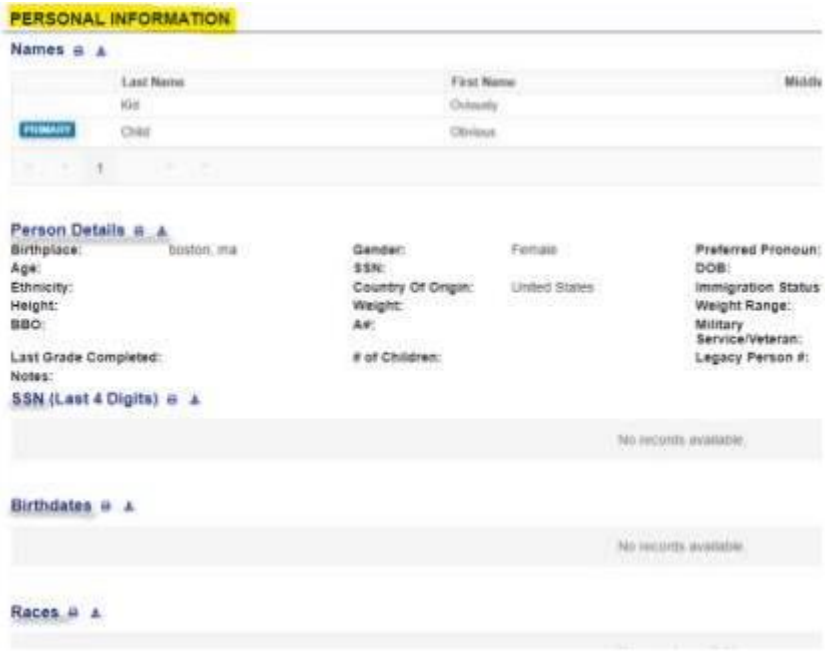
Many symbols are used in Zelly. Hovering your cursor over one for a few seconds should reveal a popup tool-tip.

Icon	Description
	Shows details about a *Person* or a *Case*. Clicking this will open a detail window
	Contact information. Hover your cursor over this when you see a name and you will see basic contact information
	Print
	Download to Word or Excel (depending on item)
	Edit something
	History. See changes to an entry and who made them
	Copy. Copy an entry. Useful if you have an entry like a *Runsheet* event that is exactly the same but on a new date. Copy, and then just change the date
	Delete an item.
	Checkbox. A checkbox is used to select an item. If a checkbox is at the top of a column of checkboxes, selecting it will select all items underneath
	Expand an item that has more information than is being shown
	Add an entry (for example, *Runsheet*)
	When viewing a list of cases, it lets you jump to the runsheets
Primary	Many types of information may have *primary* information and alternative information. For example, a client can go by multiple names, so you would indicate the one you use for them as a *primary*. Similarly, with SSN or birthdates or race. *Primary* can be changed at any time.
	Copy down button. When you see this, if you have multiple entries (for example, charges), clicking this button will copy the content to all the other selected field (unless they already have a value). So, if you have disposition on one charge, by clicking this button the disposition will be copied to all other charges.
	Remove Case Professional. On a *Case*, move someone who is no longer an active *Case Professionals* to *Previous Professionals.* They can be restored to active *Case Professionals* by editing the professional and deleting the date from *Removed Date*

	Edit Entry. When seen next to a *Case* or *Person* document, it means you may modify/update descriptive information about the file: name, status, description, category and sub-category
	Dismissed *Alert*. Signifies an *Alert* that the user has decided to hide from view. Can be restored (see *Alerts* section).
	Date Picker. Select this to pick a date graphically. The current date is always show below the calendar and may be clicked to select
	Staff Member indicator. This icon indicates someone is a member of CPCS.
	Report Data Menu. Hover over or click on data you want to export, and this icon will appear. Click it to export the report data (and perform other data functions)
	Report Focus Mode. Opens the report element in a view by itself
	Report Date Erase. Erase current dates in a report and replace with a broader range

General Terms

- **Actions Bar** - The menu on the left side of every page that allows you to return to the dashboard, search (*Conflict*, *Persons*, *Case*, etc.), get information, reports and log-out
- Dashboard – When you login, the landing page. It displays search, cases and reports
- **Navigation Bar** -The menu at the top of most pages that allows you to jump to sections within a *Case* or *Person*
- **Person** - A term for anyone interacting with CPCS through the legal system in Zelly. Not restricted to defendants/clients or non-defendants. A person could be a SSA, Investigator, Client, Witness, DA, Judge, Sibling, Parent, etc. So, everyone is a "Person."
- **Section** – A grouping of *Sub-sections*. The font size is larger than the font size of its *sub-sections*. An example would be the *Section Personal Information* (on the *Person* page). *Personal Information* contains the *Sub-sections Names, Person Details, SSN, Birthdates, Races, Languages, Religions, Citizenships*. See example below where the *Section* is highlighted in yellow and the *Sub-section* is underlined with grey



- **Security Role** – Defines what a person is allowed to do in the system, for example can they view a case, but not edit, whether they can modify portions of a case, but not the whole case
- **Sub-section** – Is more granular information related to an overall topic (a *Section).* Used to categorize related data under a *Section*. See: *Section*.
- **Row** – Some Sections or Sub-sections can allow multiple entries in a table format. This is called a *Row*. An example of this is *Name* (a person may go by different names) or A*ddress* (a person may have multiple addresses) or *Races* (a person may be multi-racial or identify as multiple races). Example below highlights two *Name Rows* the *Person* uses

- **Type-Ahead** – To eliminate scrolling long lists, many fields allow you to start typing the choice you seek and automatically filters for relevant listings. In the example, below, typing "edu" identified three items for selection. You must type a minimum of three characters

Person Field Descriptions

- **# of Children** – Number of children for the *Person*
- **A#** - Alien Registration Number. A nine-digit immigration code. For questions, contact the Immigration Impact Unit (IIU)
- **BBO** – An attorney's BBO number
- **Birthdates** – Birthdate of the person. Multiple can be stored with an indication of a primary. The system auto-calculates age based on each listed birthday versus the current date
- **Birthplace** – City and province/county where born
- **Citizenships** – The citizenship of the person. A *Person* may have multiple citizenships. Multiple may be stored with an indication of which is the primary
- **Contact information** – How to contact or reach the person. Multiple can be stored with an indication of which is the primary
    - *Address History*
    - *Phone Numbers*
    - *Digital Handles* – Person's internet (digital) addresses: WhatsApp, IM, Instagram, etc.
- **Country of Origin** – This is based on the US census. In what country the *Person* is born
- **Ethnicity** – This is based on the US census. It is either Hispanic or Non-Hispanic
- **Gender** – The gender they identify
- **Has Disability** – Checkbox indicating if the person has a disability.
- **Height, Weight, Weight Range** –Physical descriptors of the person
- **Immigration Status** – If they are a migrant, definition of their immigration status. For questions, contact the Immigration Impact Unit (IIU)
    - ***Non-U.S. citizen - Legal permanent resident (LPR)*** – A person possessing a Permanent Resident Card (also called a green card)
    - ***Non-U.S. citizen - Non-immigrant visa holder*** – A person with a current, non-expired visa who is required to leave the U.S. or renew the visa at its expiration date (e.g., student visa, tourist visa, H1-B work visa, but not TPS or DACA)
    - ***Non-U.S. citizen - Asylee/refugee*** – A person with a notice of approval indicating asylee or refugee status or an Employment Authorization Card (work permit) with a category code of A3, A4 or A5
    - ***Non-U.S. citizen - DACA*** – A person with an unexpired Employment Authorization Card (work permit) with a category code of "C33" or a notice of approval of Deferred Action for Childhood Arrivals (DACA)
    - ***Non-U.S. citizen - TPS*** – A person with an Employment Authorization Card (work permit) with a category code of "A12" or with a notice of approval of Temporary Protected Status (TPS)
    - ***Non-U.S. citizen - Undocumented/out of status*** – A person without lawful status in the U.S. (either never had lawful status or lawful status has expired)
- **Known Associates** – *Persons* in the system associated with a current *Person*. Allows the identification of type of relationship. For example, the *Known Associate* could be a *Child* of the person being updated. **Relation to** defines how the Known Associate is related to the

Person. Hover cursor over the information icon for the relationship to show expanded relationship details

- **Languages** – Languages the person speaks. Multiple can be stored with an indication of which is the primary
- **Last Grade Completed** – Number of completed formal educational years
- **Legacy Person #** - Any numerical identifier from TRIS/CMS/CASEY case management systems imported for *Person*s who were in those systems before Zelly went live
- **Medical History** – Relevant medical history of the person
- **Medications** – What medications taken or currently on. Multiple may be stored
- **Military Service** – A checkbox indicating whether the person served in the military
- **Names** – What the person does or has called themselves. Multiple names may be stored with an indication of which is their primary name
- **Needs Interpreter** – A checkbox indicating an interpreter is needed for communication
- **Notes** – A 2600-character field (equivalent one, single-space page) for any general notes on the *Person* that don't belong in a runsheet. Supports legacy functionality requested by staff
- **Organizational Memberships** – What affiliations does this *Person* have? For example, member of the YMCA of Worcester or Old Colony YMCA – Daycare
- **PCF** – A juvenile code. For questions contact YAD or CAFL managing directors
- **Person Files** – Files can be attached to a *Person*, not just a *Case*. They can either be directly uploaded to the *Person* OR added to a *Personal Runsheet*. All *Person* files are listed at the bottom their page
- **Person Runsheets** – A runsheet on a *Person*, not a *Case*. This allows attachment of notes about a person; typically used when the notes are not relevant to a specific case. If the notes are specific to a case, they should always be in the *Case* runsheets
- **Positions** – What someone does, for example police or social worker or teacher or psychiatrist or judge
- **Pronoun** –The pronoun they are called: He, she, they
- **Previous SSA Assignments** – Lists any SSAs no longer assigned to the client
- **Races** – Self-identified race of the person. Multiple may be stored with an indication of which is the primary. Based on the US Census race enumeration
- **Religions** – Religion of the person. Multiple may be stored with an indication of which is the primary
- **School History** – Schools attended. Multiple may be stored
- **SSN (Last 4 Digits)** – Last 4 digits of a person's Social Security Number (you may NOT put in their whole SSN). Multiple SSNs can be stored with an indication of which is the primary SSN
- **Status** – Marital (or lack thereof) status - married, divorced, etc.
- **View Person History** – Found under the *Other Actions* button in the top-right. Shows all changes made to a *Person* and who made them and when they were made
- **Weight Range** – Weight range for *Person* as a descriptor
- **YAD** – Positive Youth Development – YAD specific information

Case Field Descriptions

- **Arraignments** – Captures information about how a client was arraigned
- **Assisting Attorney** – Attorney assisting the assigned attorney on a case
- **Associated Office** – the office of the assigned attorney. If the attorney is reassigned it will reflect the current attorney's office assignment
- **Attorney Assigned** – The principal attorney currently assigned to the case. When this is changed, the previous attorney is moved to the Previous Professionals section
- **Bail** – Information about whether there is bail, amount, conditions and whether the client is currently in custody
- **Case Access** – Grant access to the *Case* to a member of staff that could not normally access the case
- **Case Events** – Meetings that are relevant to the *Case* and can alert people subscribed to this case. For example, 72 Hour Hearing, Adoption, Appeal, etc. *Reminder Date* is when a reminder will be sent to anyone subscribing to the cases with how they should communicate to the client (letter, email, etc.)
- **Case Files** – Files may be attached to a *Case*. They may either be directly uploaded to the *Case* OR they may be added to a *Case Runsheet*. All files for a *Case* are listed at the bottom their page. Maximum file size is 26MB
- **Case Incidents** -
- **Case Name** – An optional field that appends a short *Case* name or description to the *Case* number. Helps quickly identify a case. It shows in search or *Case History* section of the *Person* page

- **Case Professionals** – All *Persons* listed in the *Case Information* section of a *Case* are classified as *Case Professionals*. They are: Attorney Assigned, Assisting Attorney, Prosecutor, SSA/SW (CPCS), Investigator (CPCS), Judge. If they have been replaced, they will be listed under *Previous Case Professionals* sub-section
- **Case Type** – This is different from the charges. Examples could be criminal, CRA, appeal, parole, etc.
- **Charges** – Allows listing of multiple charges and redesignation of the primary charge. Can capture disposition per charge. May use type-ahead to quickly find a charge
- **Child Placement** – Where a child was placed and relevant events around the placement
    - **Sibling Status** – If there are siblings, are they placed together or separately or partially together
- **Client Associates** – Associates of the client as defined in the section **Known Associates** on the **Person** page. **Relation to** defines how they are related to the *Person*
- **Closing Date** – When the case was closed in court. Deleting this date will re-open the case

- **CORI Counts** – Captures the key information from a client CORI report as it relates to this point and time for this case
- **Court** – They physical court where the case was heard
- **Date Assigned** - Automatically created date indicating when the main attorney was assigned. This may be edited. This is updated any time the case is reassigned
- **Department** – What type of court, for example District, Superior, Juvenile, Probate, SORB
- **DYS/YO Staff/ Sentence** – Information captured primarily by YAD
- **Filed Date** – When the case was filed in court
- **Investigator** – The CPCS Investigator assigned to the case. IT automatically adds Investigators to Zelly and gives them this role. If an Investigator is missing, email Zelly and the *Person* will be corrected
- **Judge** – If a *Person* has been tagged with the role of *Judge*, they may be added to this field. To tag a *Person* with a role, you edit the *Person* and assign the role
- **Legacy Case #/ Casey** – If the *Case* is not new, but imported from TRIS/CMS/Casey, it is the old case number
- **Legal Strategy & Work Product** – Captures basic information on the legal strategy that via drop-downs, so it may be assessed easily at a later date. Not a replacement for a *Runsheet*. Simply makes it easier to quantify strategy efforts used to better assess what may be successful representing clients
- **Note** – A 2600-character field (equivalent one, single-space page) for any general notes on the case that don't belong in a runsheet. This supports legacy functionality requested by staff
- **Open Type** – How the case was opened: Appointed in Absentia, Court Notice, In Court, Retainer, Walk in
- **Opening Date** – When the case was opened in court
- **Organizations** – What organizations are engaged with the person and what is the type of engagement
- **Participants** – *Persons* involved in a case who are not *Case Professionals*. It allows you to search for a *Person* and then add them to the *Case* with a role (co-defendant, collaterals, complainant, etc.). If the *Person* is not found, you may quickly add them to Zelly and the *Case*
- **Presenting Issues** - Initial symptom/events/experience that causes a person to directed to professional help from a doctor, therapist, or another mental health provider
- **Previous Professionals** – A *Case Professional* (see *Case Professionals*, above) who is no longer on the case, for example a judge being replaced by another judge or a DA who moved and was replaced by another DA. To change a *Professional to Previous,* you click the *Remove Case Professional* button next to the person's listing
- **Prior Client** – Check this box if the person is a prior client
- **Probation** – Information regarding the terms of the client's probation
- **Prosecutor** – If a *Person* has been tagged with the role of *Prosecutor*, they may be added to this field. To tag a *Person* with a role, you edit the *Person* and assign the role
- **Referral Source** – How the client was referred to CPCS
- **Related Cases** – Any cases that may be related to the *Case*, for example a separate case for a co-defendant or a juvenile case with YAD for the same client

- **Reminder Type and Date** – Notifies all attorneys assigned to the *Case* as a *Case Professional*. It is independent of the *Case Subscriptions*. Sends reminders alerts in the system and sends you an email about some action to take, for example visiting a client, phoning a client, writing a letter, etc. Date indicates when the alert happens
- **Runsheet** – A runsheet entry relevant to the case. Should replace use of MS Word runsheets
- **Social Services** – The CPCS Social Services Advocate assigned to the case. IT automatically adds SSAs to Zelly and gives them this role. If a SSA is missing email Zelly and the *Person* will be corrected
- **Transfer Date** – Cases transferred from 3rd party to a CPCS attorney
- **YO Eligible** – A YAD field

Automated Case Opening Templates

CAFL and Criminal *Cases* have different document templates that are created. Below is a listing of the *Case* document templates that are created.

Criminal (PDD) Templates

- Blank Client Letter.docx
- Closing Sheet.docx
- CORI Request.docx
- Generic_Motion.docx
- IIU Referral.docx
- Investigation Request.docx
- Open Letter (English).docx
- Open Letter (in custody English).docx
- Open Letter (in custody Spanish).docx
- Open Letter (Spanish).docx
- Pretrial Conference Report.docx
- SSA Referral.docx
- Unsigned Appearance of Counsel (form).docx
- Unsigned Appearance of Counsel (motion).docx
- Unsigned HIPAA.docx

CAFL Templates

- Appearance of Counsel Child 2019.docx
- Appearance of Counsel Children 2019.docx
- Appearance of Counsel Father 2019.docx
- Appearance of Counsel Mother 2019.docx
- CAFL Blank Letterhead.docx
- Case Opening - Child 2019.docx
- Case Opening - Children 2019.docx
- Case Opening Father - Child 2019.docx
- Case Opening Father - Children 2019.docx
- Case Opening Mother - Child 2019.docx
- Case Opening Mother - Children 2019.docx
- Client letter re next date.docx
- Client letter re transfer within office.docx
- Collect Call Letter to Client in Jail.docx
- Court Investigator Mother 2019.docx
- Court Investigator Child 2019.docx
- Court Investigator Children 2019.docx
- Court Investigator Father 2019.docx

MHLD Templates

- Disposition Sheet.docx
- Letterhead.docx
- Notice of appearance.docx
- Rights to Appeal Client letter.docx
- WSH Request for Records.docx

YAD Templates

- Case Dispositions.docx
- DCF TEMPLATE.docx
- DYS RECORD TEMPLATE.docx
- EXCUSE LETTER TEMPLATE.pdf.docx
- Letterhead no seal no Mass.docx
- NON_EVIDENTIARY_MOTIONS_FOR_DISCOVERY.docx
- YAD - blank motion.docx
- YAD - Case Dispositions.docx
- YAD - test of all template fields.docx
- YAD appointment reminder.docx
- YAD closing letter.docx
- YAD DCF record request.docx
- YAD health care records request.docx
- YAD intro letter to guardian.docx
- YAD intro letter.docx
- YAD school excuse letter.docx
- YAD school records.docx
- YAD state wide letterhead.docx

Conflict Templates

- Appearance of Counsel Child 2019 - Conflicts.docx
- Appearance of Counsel Children 2019 - Conflicts.docx
- Appearance of Counsel Father 2019 - Conflicts.docx
- Appearance of Counsel Mother 2019 - Conflicts.docx
- CAFL Blank Letterhead - Conflicts.docx
- Case Opening - Child 2019 - Conflicts.docx
- Case Opening - Children 2019 - Conflicts.docx
- Case Opening Father - Child 2019 - Conflicts.docx
- Case Opening Father - Children 2019 - Conflicts.docx
- Case Opening Mother - Child 2019 - Conflicts.docx
- Case Opening Mother - Children 2019 - Conflicts.docx
- Client letter re next date - Conflicts.docx
- Client letter re transfer within office - Conflicts.docx
- Collect Call Letter to Client in Jail - Conflicts.docx
- Court Investigator Mother 2019 - Conflicts.docx

- Court Investigator Child 2019 - Conflicts.docx
- Court Investigator Children 2019 - Conflicts.docx
- Court Investigator Father 2019 - Conflicts.docx

YAD Templates

- Case Dispositions.docx
- DCF TEMPLATE.docx
- DYS RECORD TEMPLATE.docx
- EXCUSE LETTER TEMPLATE.pdf.docx
- Letterhead no seal no Mass.docx
- NON_EVIDENTIARY_MOTIONS_FOR_DISCOVERY.docx
- YAD - blank motion.docx
- YAD - Case Dispositions.docx
- YAD - test of all template fields.docx
- YAD appointment reminder.docx
- YAD closing letter.docx
- YAD DCF record request.docx
- YAD health care records request.docx
- YAD intro letter to guardian.docx
- YAD intro letter.docx
- YAD school excuse letter.docx
- YAD school records.docx
- YAD state wide letterhead.docx

Frequently Asked Questions

Support

Q: How do I make a support request for Zelly?

A: The Zelly Support Page explains the process for submitting requests for help and inquiries about Zelly. If the request involves a particular case or cases, be sure to include the relevant case numbers. For errors, please also attach screen capture of your Zelly web page. All Zelly support requests should be sent to Zelly@publiccounsel.net.

Person is a generic term for a human in the system, because a person could be a client on one case, a victim on another and a witness on a third. So, all Persons (defendants or non-defendants) will have a "Person record" in Zelly.

Q: How do I create a screen capture?

A: This guide explains how to capture a screen image:

- **Screen Capture Guide (PDF version)**
- **Screen Capture Guide (MS Word version)**

Q: I'm trying to use Zelly, but I got this message. What do I do?

A: Zelly data are stored remotely in the Microsoft Azure Cloud, so that data can be accessed from any device with internet connectivity. There is a known issue involving the Microsoft Windows Azure Firewall security scan that sometimes flags legitimate requests for Azure cloud data as malicious hacking attempts. The problem is not under agency control and cannot be fixed on our end.

Should you see this message, you should first click the Return To Zelly button, which will try to restart the application. If that fails, you should close *all* of your browser windows. This means not just the browser tabs where Zelly is running, but all browser windows i.e. shut down Chrome or Firefox entirely. Then try running Zelly again.

Person

Q: What is a **Person**? And do clients and non-clients both have "Person records?"

A: Person is a term for anyone interacting with CPCS through the legal system: SSA, Investigator, Client, Witness, DA, Judge, Sibling, Parent, etc.. So, everyone is a "Person." Person is a generic

term for a human in the system, because a person could be a client on one case, a victim on another and a witness on a third. So all Persons (defendants or non-defendants) will have a “Person record” in Zelly.

Q: Can **Person** details be added later as we learn more about the client?

A: Yes

Q: If you have a client who has two or more names – like one which the police think is his/hers and one by which they refer to themselves – can we enter both and will they be linked somehow within the system – so both names might come up during a conflict check?

A: A person (client) in Zelly can have multiple names. If you search for an alternate name (one not tagged as **Primary**) it will find that person and show them by listing their primary name.

Q: In C&Ps, we have the same DCF social workers … we would still have to search for the social worker before adding … is there a button that that would autofill the same info or do we have to fill out contact info each time?

A: If the DCF social worker is already in the system, you just need to find them and add them to the case. You don’t need to fill out their contact information each time. You only need to edit their contact information when it changes, once a person is created.

Q: Is there a way to look at former addresses?

A: Yes. Zelly can store as many addresses as you wish with an indication of what is believed to be the most recent or active (Primary).

Q: What if you misspell a person so don’t find it, but after you add new person you realize the error?

A: Email zelly@publiccounsel.net with the mistake (correct Person/Person in error) and we can either merge them (if you added information to the mistaken one) or delete them (if no information was added).

Q: What if a user (mistakenly or inadvertently) attempts to enter a new person when that person, in fact, already exists in the system? Will Zelly prevent the user from doing that? What, if any, other safeguards are there in Zelly to prevent the entry of duplicate persons?

A: No, but when discovered the duplicate may be merged with an existing user by sending a request to zelly@publiccounsel.net

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Q: It would be a big help if the age of the person is generated aside of the date of birth.

A: It is.

Q: Is there a way to restrict what information gets captured in 'data collection'? For example, it is important for a lawyer to know the immigration information on a PDD client – but they may not want that information to be collected in a more broad manner.

A: If a member of staff has access to a person or case, they can see all populated fields.

Case

Q: Will an attorney in the adult division be able to see if a client had a case with YAD. Or a YAD attorney be able to see if there is a case with CAFL?

A: Yes. Visibility works as you describe. They WON'T be able to see the details (to protect against conflicts without permission), but they will be able to see the basics.

Q: How is the case number assigned? Will the agency use this number for tracking purposes (similar to the old CASEY number)?

A: The case number field is sequential, not chronological or random. Each new case is assigned the next sequential, free number. Cases also have a *Case Name* field that allows you to name a case as you choose. For example, if you wish to name a case "FY2021-Worcester" in the CASEY manner, you may. Case numbers are not office specific.

Q: When searching cases, why do the results sometimes contain docket numbers, and sometimes not?

A: Docket numbers in search results are shown only for those cases in which one charge is designated the Lead Charge. Please note that you can still search for cases by docket number.

Q: Will Zelly work with AAA or is it intended to replace the AAA electronic files as well?

A: AAA is the automated case opening in CASEY. This creates key templates for cases.
The **Generate Documents** function in Zelly now does this function and automatically attaches the files to the case in Zelly. You can learn more about this in the Power User Training or in the User

Guide.

Q: CMS allowed closed cases to be cloned – very helpful if a case were reopened. Is this cloning feature available in Zelly?

A: In Zelly that is unnecessary, because the case may simply be re-opened.

Q: Can a case be reopened in another office? For example, sometimes a CAFL case gets transferred to another office?

A: Yes.

Q: How do I transfer a case to another office? Is there a way I can maintain access to the case after it is transferred?

A: See the How To Transfer A Case To Another Office page for instructions.

Q: Will last 4 digits of social security number be required to open a case?

A: No. Almost all fields are optional.

Q: Will investigators be able to have "my case list" in this system?

A: Yes. On the dashboard they can use the case filter to show only "my cases." Of course, the Investigator must be added to a case for this to occur.

Q: Will Zelly recognize more than one attorney being assigned to a case?

A: Yes.

Q: Can you delete a case?

A: If you have mistakenly created a case (for example, you created it but then we had to conflict out or you created one after forgetting your previously created it), you may **Deactivate** it from the **Other Actions** button (top-left) of a case. This hides it, but if it is ever necessary, IT can recovery it.

Q: If one attorney has cases in several offices, will we be able to see all of our cases on one screen, whether we are secondary or primary?

A: Yes.

Old Apps and Data

Q: What happened to the data in CASEY and TRIS/CMS? Will we need these applications to manage cases until the older cases are closed?

A: ALL data (***except*** CASEY Runsheet documents) have been migrated from the old systems into Zelly, including open cases. CASEY and TRIS/CMS should not be used to manage cases. Any data entered in these old apps after noon on 4/30/2021 will not be migrated to Zelly, and access to these old apps may be removed at any time.

Q: Where are my TRIS or CASEY runsheet entries?

A: TRIS entries were migrated to Zelly.

CASEY Runsheet documents from network storage were not migrated to Zelly. The user can manually add these to Zelly if they are required.

Q: If I make a change in CASEY or TRIS/CMS, will that change be visible in Zelly?

A: No. CASEY and TRIS/CMS are archived applications. Changes made in these apps will not be updated into Zelly.

Security/Login/Access

Q: If someone has two logins on TRIS (i.e., from different offices), will they be combined in Zelly or will there be two logins again?

A: They will only have one login. We've revamped Zelly security, so a person will ONLY EVER need one login, even if they have access to cases in various offices or divisions.

Q: Do student interns have access to Zelly once IT set up their CPCS login credentials?

A: Yes. As long as their access is requested in the Intern onboarding form. If it isn't, it may be

requested at a later date.

Search

Q: Does search have a Soundex option

A: It does have the option to do a **fuzzy** search in the last name. The default is “contains.” To change to fuzzy, select from the **Search Type** drop-down in the advance search.

Q: Can one search just by docket # or is a name required for a case?

A: You can search by docket # or case number (case number from the old systems or from Zelly). Advanced case search gives you many other options as well like searching by attorney, person, date range, etc.

Q: If you misspell a name, will Zelly pull up something close to it?

A: It does depend on how you misspell it. Regular search should find it if it contains enough of the actual name or you can set search to **Fuzzy** to find names where you aren’t 100% on the spelling.

Q: How do you ID in Zelly that the person is a bail only?

A: When you do an advanced case search there is **case type** dropdown, which has bail only option to select.

Alerts

Q: Are the alerts for run sheets in replacement of emailing that could take place in CMS?

A: Alerts for runsheets or changes to a case/person can be emailed to the user or just shown in the dashboard or both. It is the user’s choice.

Runsheets

Q: Can you add more than one runsheet? i.e. the attorney’s, investigator, social workers?

A: Yes

Q: How many pages will there be for running sheets?

A: On a case or person you can have multiple runsheets. Each runsheet can hold up to 10,000

characters (or roughly 4 single-spaced pages). You can also upload files to a runsheet. So, you can write the next great American novel using multiple runsheets.

Q: Can you look at the original text of a runsheet that has been edited when looking in history?

A: Yes. By opening the latest version and an earlier version.

Q: Is there an efficient way to import emails into case run sheets?

A: Currently, you may do this through copy (from email) and paste (to a runsheet).

Documents

Q: What are Document Tags and what are they used for?

A: Tags are a way of organizing Documents into groups within a Case for easier access. Zelly Tags work similarly to tags in the Evernote application. They can be used to group Documents together in the way that CASEY Case folders on network storage grouped related documents for a Case in that application. A Document is allowed to have up to 5 Tags.

Q: It sounds as if we are meant to use Zelly to replace our electronic file/case folders. Is that correct? Will we only be able to update running sheets by going into Zelly?

A: Yes. Except for files over 26MB, which are too large for Zelly, everything can be done in Zelly now. Runsheets should be kept in Zelly, not Word documents on the network. CAFL and YAD have had this practice for a number of years. Unfortunately, the runsheet function in CASEY was so poor, that it forced people to use Word.

Q: If you have a draft of a pleading you are working on, do you need do re-upload it every time you make a change?

A: The short answer is “no.” The intent of the system is to keep all documents with the case, but not to drive you nuts. You might like to keep major drafts up there if you want others to be able to easily review it, but the overall expectation is just having final documents (or ones you think are final or major revisions) up there.

Q: Can you delete the wrong docs uploaded to Zelly?

A: Yes. You must be in **Edit** mode for the respective **Case** or **Person.** You will see a trash can icon next to each file. Selecting the icon will delete the file.

Q: Can I add my own document templates, or modify existing templates?

A: No. A Zelly design requirement specifies that documents be standardized across offices within divisions. Changes to a document template will affect all offices that use that document.

Q: What is the maximum file size that can be uploaded to Zelly?

A: The maximum file size that Zelly will accept is 26MB. Zelly only accepts files less than 26 MBs. Multiple files can be uploaded to Zelly simultaneously as long as each file is under 26 MBs. We do not recommend uploading more than 10 files at a time.

Reports

Q: Can reports be exported to Excel?

A: Yes.

Q: Where can I find more information about Zelly Reports?

A: The Report User Guide (PDF) provides more information on reports.

Miscellaneous

Q: Which browsers are most compatible with Zelly?

A: On the desktop, Chrome and Firefox are recommended. Safari and Microsoft Edge are not recommended since Zelly has not been tested extensively on these browsers. **The old Microsoft Internet Explorer browser *is not compatible with Zelly*, and should not be used with Zelly.**

Q: When I use my mobile phone, I can't see enough columns in a conflict check. What should I do?

A: Click the **Desktop** link at the bottom of the Zelly mobile phone screen. Then run your conflict check.

Q: What time zone does Zelly use?

A: Eastern.

Q: Will there be specific trainings for specific divisions? Like CAFL vs YAD vs Criminal?

A: There won't be specific training for each division. Currently, the system has the same functionality across divisions. Staff ignore the functionality that are not relevant to their division.

Q: How long can you leave your data open before it 'times-out', loses the data you didn't save.

A: One-hour. If you enter data, but don't save it, and then do nothing on that page for one-hour (go out and grab lunch), you will lose that data.

Q: If it times out and you were in the middle of entering data, but have not saved, will you lose that data?

A: If you are actively entering data, it will not time-out. If you have left an unsaved page idle, after one-hour it will time-out.

Training Videos

Training videos may be found on a Google Drive.

Recordings of the formal trainings are stored on a Google drive.

"Snapshot" training videos cover key subjects. The purpose of these videos is to demonstrate in under 5 minute (usually) a very specific function in Zelly. Additional ones will be added based on user feedback. Each video has a name, length, and brief description.

The link to the drive with ALL the videos is https://drive.google.com/drive/folders/1LsP0gdogkIIXyx01P5GstT3tSOcMDXrW?usp=sharing

NOTE: If a video is blurry when playing, press pause and play in rapid succession which fixes the issue.

Recordings of Formal Trainings:

Overview Training (57 minutes 32 seconds): https://drive.google.com/file/d/17NYE1LXYnw4eKbZT5oVxFz3Ri2vcl0Iv/view?usp=sharing

Deeper Diver Training (1 hour 53 minutes): https://drive.google.com/file/d/1a81kXcyZI9kUYJEL5knGGX4H_qmUTZj4/view?usp=shari

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Snapshot Training Videos – Short videos on specific topics

1. **Add a Case Participant**, 5 minutes 5 seconds - how to add participants to a case
2. **Add Charges to a Cas**e, 3 minutes - how to add charges to a case
3. **Add Participant Not in Zelly to a Case**, 3 minutes 37 seconds – quick and simple method to add a person to a case, who isn't currently in Zelly, while staying in that case
4. **Add Person**, 2 minutes 3 seconds - simple method to add a person
5. **Add Position to a Person**, 1 minute 48 seconds - adding a position (like Police or Judge, etc.) to a person
6. **Add Sibling Co-clients to a Case – CAFL**, 4 minutes – many CAFL cases have multiple clients on the same NAC. This demonstrates how to create such a case in Zelly. It works for any division, not just CAFL
7. **AKA or Multiple Names, 2 minutes, 8 seconds** – how to give a *Person*/client multiple names and how this affects search
8. **Alerts and Subscriptions,** 9 minutes 24 seconds – what are alerts, subtribe to alerts, and manage alerts
9. **Bind-over Cases,** 2 minutes 45 seconds - how to bind-over from District to Superior
10. **CAFL Dedicated Training**, 1 hour 11 minutes 7 seconds
11. **Case Create**, 1 minute 43 seconds - simple method for adding a *Case*, excluding Bail Only
12. **Case Events,** 4 minutes and 03 seconds – what are *Case* events, how they are added and used
13. **Cloning a Case**, 2 minutes 45 seconds – copying (most) information from an existing case to a new case, including case participants
14. **Close a Case**, 3 minutes 13 seconds - process for closing a case
15. **Conflict Check - Search,** 1 minute 4 seconds - how to perform a simple conflict check
16. **Create Bail Only Case,** 2 minutes 21 seconds - how to create a Bail Only Case quickly
17. **Creating a Case and Defendants and Witness from a Police Report**, 18 minutes 57 seconds – creating a case using police report, including defendants, witnesses, victims, charges, uploading the police report, creating a runsheet, etc.
18. **Dashboard**, 1 minute 59 seconds - Description of the features of the homepage of Zelly
19. **Deep Dive Training**, 1 hour 53 minutes – more detailed general training
20. **Download Documents**, 2 minutes 34 seconds - how to download documents stored in Zelly
21. **Download Runsheets or Other Parts of a Case or Person Page**, 1 minute 58 seconds - how to download parts of a case or person page for sharing
22. **Generate Documents - AAA - Case Templates**, 3 minutes 4 seconds - method for generating case document templates
23. **Investigators**, 5 minutes 2 seconds - adding an Investigator to a case and indicating their level of effort on a Case
24. **Known Associates**, 3 minutes 30 seconds - Listing known associates of a person AND their relationship to that person
25. **Navigation - Action Bar**, 4 minutes 52 seconds - Illustrates the functionality and value of the Action Bar
26. **Navigation - Navigation Bar**, 2 minutes 9 seconds - Demonstrates the use of the Navigation Bar and how it makes navigating a person and a case easier
27. **Other Actions Menu - Case**, 3 minutes 12 seconds - review of all the functionality in the Other Actions menu for a case
28. **Other Actions Menu - Person**, 2 minutes 46 seconds - review of all the functionality in the Other Actions menu for a person
29. **Overview Training**, 57 minutes 32 seconds – high level broad training
30. **Person - Editing and Adding** Information, 7 minutes 19 seconds - editing and adding information to a person page

31. **Re-open a Closed Case**, 1 minute 34 seconds – how to re-open a case
32. **Reports,** 3 minutes 44 seconds – key reports functionality
33. **Runsheet – Case**, 6 minutes 53 seconds – how to create and edit a *Case Runsheet*
34. **Runsheet – Person**, 6 minutes 14 seconds – how to create and edit a *Person Runsheet*
35. **Search – Case,** 4 minutes 10 seconds – the four key methods to search for a *Case*: Zelly case #, docket #, case name, and legacy case number
36. **Search - Person**, 1 minute 41 seconds - how to quickly search for a person in Zelly and get their demographic/contact information
37. **Search for Text within a Runsheet,** 3 minutes 56 seconds – demonstration on how to search for a runsheet which contains the text you are seeking. Helpful if you aren't sure which runsheet has the information you require
38. **Social Services Advocates SSA/SW**, 5 minutes 29 seconds - adding an SSA/SW to a case and indicating their level of effort on a *Case*
39. **Special Case Access**, 2 minutes 48 seconds - Allows you to grant access to a *Case* to someone not linked to the *Case* as a *Professional* (Attorney, Investigator, SW/SSA) and isn't assigned to the *"Associated Office"* of the *Case*
40. **Upload Files**, 5 minutes 10 seconds - how to upload documents to Zelly