

ST. JOSEPH PROBATE COURT

QUEST TRAINING NOTES

Getting Started:

Start Internet Explorer and go to www.jjconline.org
Click "Log onto Quest"

Jurisdiction : stjoe

UserID: _____

(Six characters consisting of the first three letters of your first name followed by the first three letters of your last name.)

Password: Your userid in ALL CAPS

Notes: You can log on with a userid of lawyer with a password of LAWYER to view all public cases.

You may want to set your screen resolution to a minimum of 1024 X 768.

You can right click from the www.jjconline.org opening screen and create a shortcut to be placed onto your desktop for easy access in the future.

Menu and Buttons:

Quest provides a menu and buttons to navigate through the system.

The menu is powered by a Java Virtual Machine. If your menu does not populate when you first log on, exit out of Quest and browse back to the log on screen. Here you will find a Red Java – Get it now box. This is a free download of the Virtual Machine from Sun Microsystems.

The menu will open a submenu when you hover over a topic. For instance, if you hover your cursor over Court a submenu will appear with different Court related screens. Click on the screen menu you wish to go to.

On the bottom of your Quest screen you will see a series of buttons. These buttons replace the ones provided by Internet Explorer. Update acts as a Save button, Cancel acts as a back button, Refresh refreshes, Delete deletes and so on.

Notes: Do not use the Internet Explorer browser buttons on the top of your screen (back, refresh, etc.) except for print. Use the buttons on the bottom of the screen that Quest provides or the menu to the left.

Changing your password:

Select Person – Name Search

Type in your last name, tab over and type in the first initial of your first name.

Click Submit or press Enter.

A list of names will appear.

Select yourself from the list by clicking on your name.

Scroll down about a half inch until you see “Type new password twice”.

Enter in a new password. The password must be alphanumeric and there is no restriction on length. The password is CASE SENSITIVE. Press tab and enter it in again and then click Update in the lower left hand corner to save.

Notes: _____

Update your address and contact numbers:

Scroll down to addresses and confirm your address is correct.

If it is not, click add on the far right of the gray address bar.

Select Business as your address type.

You can skip the From Date if you wish.

Enter the street address of your business in Address line 1.

If you have a suite or P.O. Box #, enter it in Address line 2.

Enter the city, state and zip and click update to save.

You will now have returned to your person detail screen and see Contact Numbers below your address.

Click add in the far right of the gray contact numbers bar.

You will now have an opportunity to enter in all of your contact numbers.

Click Update when you are finished to save.

Notes: _____

Managing your “Caseload”:

On the menu to the left, click on Supervision – My Caseload.

**This will be the screen you should almost always start with.

A list of names will appear. These are the cases you have access to in the St. Joseph Probate Court.

You can click on “Show Details” to view all upcoming hearings.

The first two columns will display the name associated with the case and the case you are assigned to.

By clicking on the name, you will go to the “Person Detail” screen which contains information about that person, regardless of their case involvement.

By clicking on the number to the right of the name, you will go to the “Case Detail” screen which contains information about that particular case. This is the best screen to obtain information about the case and to create and view documents.

Notes: _____

Adding a new case/making an appearance:

The Clerk will add cases to the Quest system after you submit the appropriate paperwork (see attached) along with a check for the filing fee and a Will, when applicable.

If you are making an appearance on a case, you must submit the appearance form (see attached) by hand or fax it to the Clerks office at 235-5501.

Keep in mind you can always log on as lawyer-LAWYER to view information on a case prior to making an appearance, as long as the case is not confidential.

Notes: _____

Adding relatives/heirs:

From the Person Detail screen scroll down to Relatives.

Click add on the far right of the gray Relatives bar.

Click on “Get Relative Name”.

The name search screen will appear.

Enter the last name and first initial of the first name of the person you are going to add.

If a name appears, you may want to click on Addresses and/or Show Relatives to confirm or deny that the person in the Quest database is the person you would like to add.

If you find the relative you would like to add, click on their name.

If you do not find the relative you wish to add, click on "Add a new name" in the far left hand column.

A "Person Detail – New Identity" screen will appear. Please enter as much information as possible to prevent duplicate entries in the future.

Click Update when you are finished to save and then click Cancel to go back to the Add Relative Screen.

Select the Relationship Type and click Update.

You will now be back to the Person Detail screen for the person tied to the case (decedent, juvenile, minor, etc.)

You will see the Relative you just added with "add" listed twice to the right of the persons name. Click on the add in the center of the screen to enter an address. Click on the add to the right of the screen to enter in contact numbers.

Repeat this process for additional relatives.

Notes: _____

Other information about a person can be found from the person detail screen. This includes warrants, arrests, employers, schools, Quest history and links to all of the person's cases to name a few.

Additional Notes for Person Detail:

Case Detail:

From the case detail screen an authorized user can find information related to the specific case. This information includes persons assigned to the case, case attributes, filed charges, sanctions, both past and future hearings, the CCS and all case related documents.

Additional Notes for Case Detail:

DOCUMENTS

Existing:

A list of current documents residing on the Quest system can be found in two main areas. The most popular place is at the bottom of the case detail screen. They are listed chronologically with the most recent to the top.

Documents reside in one of two fashions: Quest generated and scanned. All documents that are completed or finished have a View button to the left of the document description. Quest documents have the title underlined and can be viewed by simply clicking the View button with one exception. The first time a computer attempts to view an Order, Quest will prompt the user to download a third party piece of software to view the Judge and/or Magistrate's signature. Simply follow the prompts or call Mike Lochmondy at 235-5339 for assistance in completing this procedure. Once installed, all signatures will be viewable on that PC.

When you are finished viewing the Quest document, click Cancel to go back to the list of forms.

Scanned documents are not underlined and require more user intervention to view. When a user attempts to view a scanned document it will be prompted to enter in a UserID and Password. These have been generically assigned as x. Therefore, UserID: x Password x Security is handled elsewhere. The very first time a computer attempts to view a scanned document, Quest will prompt the user to download a third party software the Court has approved. This process is similar to the signature download mentioned above, however it is much easier and quicker.

When the scanned document appears, it will open in its own window. You will find buttons on the top of the window for viewing additional pages (next arrow), printing, rotating and changing the view. The drop down arrow to the right of the view button can be clicked on to select "Width". This will make the document much easier to read and is highly recommended.

When you are finished viewing the scanned document, simply close the window.

Notes: _____

Creating:

From Quest:

Scroll to the bottom of the case detail screen until you see the documents/docket entries. Click add document on the far right of the gray documents/docket entries bar.

The Document Detail screen will appear.

You will have a drop down menu that says –select- in the upper middle of your screen.

This menu contains all documents you are able to create.

You can search the list by entering in a keyword into the "List Templates Containing" field and pressing Tab. This will only display the document templates that contain the word you are looking for. An example would be Final. This would shorten the list to only the documents related to final accounting or final distribution.

Once you select your document, Click Update in the lower left hand corner of your screen to begin a question –answer session or a mini interview.

After you have finished answering all of the questions, you will be prompted to review your document and/or finish the document.

You should always review documents by selecting Preview prior to Finishing them. **By clicking Finish, the document is sent to the Judge for approval or to the Clerks for filing.** Once approved or filed, the document may not be modified.

Minute Sheets or CCS/Docket entries are automatically made when you use a Quest form.

Notes: _____

From another word processor:

You can create an administrative Order or Pleading in Microsoft Word, Wordperfect or any other word processing program and copy the content so it can be pasted into Quest. Simply create a document (stated above) using the template name FFPLEADING, FFORDER, FFPLEADC or FFORDERC (the “C’s” are for confidential “green paper” filings). These documents will instruct you to select a case type, make a CCS entry and paste the content of the document into Quest.

Notes: You will need to rename the template (from FFORDER for instance) to reflect the name of the document you are pasting in.

From a PDF or TIFF image:

In a similar fashion as federal bankruptcy Court, documents can be uploaded into Quest if they are in a PDF or TIFF format. Scanners and/or third party software programs can be utilized to turn regular Word or Wordperfect documents into a PDF or TIFF image. Simply create a document in Quest (stated above) using the template USCAN or USCANCON for confidential, “green paper” filings. These documents will instruct you to make a CCS entry and upload the image from your hard drive, server or network source into Quest. You will need to rename the template to reflect the name of the document you are uploading in.

Notes: The document cannot be an Order as there is no way for the Judge to sign the document image.

I believe Word and Wordperfect have “Save As” options to save as a PDF.

Third Party software vendors include Win2PDF from www.daneprairie.com and ePrint from www.leadtools.com

OTHER MENU OPTIONS:

Court:

If you hover over Court, you can select “Monthly Calendar” to check for available Court time prior to calling the Clerk’s office to request a hearing date.

Select a Court room to view.

The current month will appear.

All dates with negative red numbers are full.

Blue numbers show how much time a morning or afternoon has left.

Each hearing type has an associated length tied to it. The Court will only hear 150 minutes of hearings in the morning and 180 in the afternoon.

Notes: _____

Help:

If you hover over Help, two options will appear. The first is Help and the second is Active Users.

Help – help will show you two pages of hints that were not covered in this note sheet and may have only been touched on during training. When you become comfortable with the system, you should read this literature for some helpful shortcuts.

Help – Active Users will show you a list of users who are currently logged on. If you want to send a message to another attorney, clerk or Quest user, you can check to see if they are logged on and if you should expect a timely response.

Notes: _____

Miscellaneous:

There are only two options here you should take note of. View and Messages.

View will allow you to make a page printer friendly. This is not necessary for printing documents. It is nice if you wish to print out a person or case detail screen.

View can also be used to move the menu from the left side of the screen to the top of the screen. I personally don’t care for this option as the menu on the left provides some useful tools such as a shortcut to jump from case to case.

Messages:

Messages can be **retrieved** in three different ways. The first is when you first log on. The opening screen will contain all of your messages. The second is when a new message arrives, you will receive a link in the upper left hand corner of the screen that you have a new message. The third is by using Miscellaneous – Messages.

Messages can be **deleted** by clicking in the box to the left of the message (to select) and clicking the Delete button on the bottom of the screen two times. You can select all messages to be deleted by clicking on the blue delete above the check boxes and then clicking the Delete button on the bottom of the screen twice.

Messages can be **sent** three ways. To a user, to a group of users or by interrupting a person or group of users.

Simply click on “Add a new message” from your messages screen.

Select the radio buttons for a user or a group and if you want them to be interrupted with the instant message feature.

You can enter in a persons userid or use the Lookup button on the bottom of the screen to find a persons id or to view user groups.

Type in your message. You can also paste a message in from another source.

Click Update in the lower right hand corner of your screen to send the message.

Notes: The message will be saved so you can send it to another user or group.

You can call Mike Lochmondy at 235-5339 (office), 329-8961 (cell), Quest message to micloc or email to mlochmondy@jjconline.org for questions or further assistance.

ST. JOSEPH PROBATE COURT

USER AGREEMENT

In consideration for the use of the *QUEST* Computer Management System for the viewing and filing of cases in the St. Joseph Probate Court and the issuance of a password and user name the undersigned hereby agrees as follows:

1. To comply with court rules pertaining to the use and application of the court's computer case management system known as *QUEST*.
2. To not send harmful or deleterious matter into the court's information system.
3. To comply with all state statutes, case law and trial rules in utilizing the *QUEST* Case Management System.
4. To receive service of documents through the *QUEST* system.

The undersigned further agrees and consents that a copy of this agreement shall be filed in the office of the Clerk of the Probate Court and shall be applicable to any case in which the undersigned appears.

Dated this _____ day of _____, 20____

Attorney Name

Address

ID Number

Phone Number

IN THE ST. JOSEPH PROBATE COURT

(Caption)

)
) Case Number:
) (To be supplied by Clerk when case is filed.)

APPEARANCE BY ATTORNEY

Party Classification: Initiating _____ Responding _____ Intervening _____

1. The undersigned attorney and all attorneys listed on this form now appear in this case for the following party member(s):

2. What is party member's relationship to the case?

3. Applicable attorney information for service as required by Trial Rule 5(B)(2) and for case information as required by Trial Rules 3.1 and 77(B) is as follows:

Name: _____ Atty. Number: _____
Address: _____ Phone: _____
_____ FAX: _____
_____ E-mail: _____

[Attach additional pages if needed.]

4. There are other party members: Yes _____ No _____ (If yes, list on continuation page.)

5. If first initiating party filing this case, the Clerk is requested to assign this case the following Case Type under Administrative Rule 8(b)(3): _____

6. I will accept service by E-mail at the above noted number: Yes _____ No _____

7. This case involves support issues. Yes _____ No _____ (If yes, supply social security numbers for all family members on a separately attached page using **light green paper**.)

8. There are related cases: Yes _____ No _____ (If yes, list on continuation page)

9. This form has been served on all other parties. Certificate of Service is attached: Yes _____ No _____

10. Additional information required by local rule:

Attorney-at-Law
Attorney information shown above

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ESTATE INFORMATION FORM

Cause Number 71J01.0 _____ E _____ .000 _____

Quest Number _____

Attorney's Name & ID Number _____
 Firm Name _____
 Address: _____
 Phone & Fax # _____
 E-Mail Address _____

A. Bring:

1. A check in the amount of \$152.00
2. The Original Will plus one copy
3. Envelopes addressed for Heirs and, if needed, Creditors
4. If filing Paper Filings (hard copy), please add the Quest # under the Cause # on all filings

B. Type of Filing:

- | | |
|---|---|
| <input type="checkbox"/> Testate | <input type="checkbox"/> Intestate |
| <input type="checkbox"/> Supervised | <input type="checkbox"/> Unsupervised |
| <input type="checkbox"/> Wrongful Death | <input type="checkbox"/> Ancillary |
| <input type="checkbox"/> Small Estate | |
| <input type="checkbox"/> Inheritance Tax Only - No \$ Charge | <input type="checkbox"/> Open Safe Deposit Box Only |
| <input type="checkbox"/> Spread the Will Only - No \$ Charge | <input type="checkbox"/> - No \$ Charge |
| <input type="checkbox"/> Spread the Will AND Inheritance Tax - No \$ Charge | |

C. Information Needed:

1. Name of Deceased: _____
 Social Security Number _____ Male _____ Female _____
 Date of Birth _____ Age _____ Date of Death _____
 Other Court Cases _____
2. Personal Representative(s) or Petitioner(s) Name, Address and Date of Birth and Relationship:

3. Heir(s) Name, Address, Date of Birth and Relationship:

4. Unsupervised Estates:
 Total Value of Estate (Personal & Real Property) for Bond \$ _____
 Is Bond included: Yes _____ No _____
 If Yes, Name of Bond Company _____
 Amount of Bond _____

ATTORNEY'S "APPEARANCE" SIGNATURE

Revised 7.06

GUARDIANSHIP INFORMATION FORM

Cause Number 71J01.0 _____ .GU.000 _____

Quest Number _____

Attorney's Name & ID Number _____
 Firm Name _____
 Address _____
 Phone & Fax # _____
 E-Mail Address _____

A. Bring:

1. A check in the amount of \$152.00 (St. Joseph County Clerk)
2. A check in the amount of \$13.00 (Sheriff of St. Joseph County)
OR addressed certified envelopes
3. Hearing date assigned: _____
4. If filing Paper Filings (hard copy), please add the Quest # under the Cause # on all filings

B. Type of Filing:

_____ Minor _____ Incapacitation _____ Minor's Compromise

_____ Personal Injury Claim

Covers: _____ Person & Estate _____ Estate _____ Person

C. Information Needed:

1. Ward(s) Name: _____
 Address: _____

Ward(s): _____ Age _____ Date of Birth _____ Male _____ Female

2. Other Court Cases: _____

3. Guardian(s) Name: _____

Date of Birth: _____ Relationship _____

Address: _____

4. Relative(s) and/or Interested person(s): Name, Relationship, Date of Birth, Address:

 ATTORNEY'S "APPEARANCE" SIGNATURE

Revised 7.06

TRUST INFORMATION FORM

Cause Number 71J01.0 _____ TR.000 _____

Quest Number _____

Attorney's	Name & ID Number _____
	Firm Name _____
	Address _____
	Phone & Fax # _____
	E-Mail Address _____

A. Bring:

1. A check in the amount of \$152.00
2. Addressed certified envelopes, if the case requires
3. Hearing date assigned: _____
4. If filing Paper Filings (hard copy), please add the Quest # under the Cause # on all filings

B. Specific Name of Trust: _____

C. Information Needed:

1. Trustee's Name: _____
 Address: _____

Trustee(s): ___ Age ___ Date of Birth ___ Male ___ Female
 _____ Relationship

2. Other Court Cases: _____

3. Beneficiary (s): Name, Relationship, Date of Birth, Address:

ATTORNEY'S "APPEARANCE" SIGNATURE

Revised 7.06

ADOPTION INFORMATION FORM

Cause Number 71J01.0 _____ AD.000 _____

Quest Number _____

Attorney's Name & ID Number _____
 Firm Name _____
 Address _____
 Phone & Fax # _____
 E-Mail Address _____
 Attorney Represents _____

A. Bring:
 1. A check in the amount of \$132.00
 2. Hearing date, if assigned: _____

B. Required:
 1. Medical Report \$20.00
 2. Record of Adoption \$10.00 (per child)
 3. Putative Father Registry \$50.00

C. Type of Adoption:
 _____ Private _____ Step Parent _____ Single Parent _____ Foreign _____ Other

D. Child to be Adopted:
 1. Child's Name: _____
 Address: _____

 Place of Birth _____
 Date of Birth _____ Age _____ Male _____ Female _____
 Social Security Number _____

2. Other Court Cases: _____

E. Adoptive Parent(s):
 1. Adoptive Father's Name: _____
 Address: _____
 Relationship: _____
 Date of Birth _____ Age _____ Social Security Number _____

2. Adoptive Mother's Name: _____
 Address: _____
 Relationship: _____
 Date of Birth _____ Age _____ Social Security Number _____

 ATTORNEY'S "APPEARANCE" SIGNATURE

PURPOSE OF ISETS & QUEST CASE INFORMATION FORM

The Federal *Personal Responsibility and Work Opportunity Reconciliation Act of 1996* ("PRWORA") requires that Indiana---along with other states and American jurisdictions---establish a centralized state "case registry" as a part of a national automated child support information system. IV-D child support cases (i.e., child support cases prosecuted by the state) as well as non IV-D child support cases (private or *pro se* cases) established or modified on or after October 1, 1998 must be a part of this registry. Ultimately a Federal registry will link all jurisdictions together for more effective nationwide child support enforcement.

Since 1997, the St. Joseph Probate Court has maintained some court records, including certain child support orders, on a computer system know as *QUEST*. Beginning in 1998, the *QUEST* system will also be used to maintain support records in cases involving children born out of wedlock. The St. Joseph County Clerk's Office will become a part of the Indiana central registry by going online with the *ISETS* computer system operated by the Indiana Family and Social Services Administration.

Effective immediately, in addition to the Appearance form required by Trial Rule 3.1, the St. Joseph County Circuit, Probate and Superior Courts require the **full** completion of the form on the reverse as a prerequisite to the filing by any attorney or *pro se* litigant of a request to establish, modify or enforce a child support order. To help the Clerk that types the required data into the *ISETS* and *QUEST* systems, it is requested that the information on this form be typed rather than hand written. Additional sheets may be used if necessary.

Further, if there is a protective or restraining order affecting a party, or if there is an existing case number involving child support for a child(ren) for whom support is an issue, the following information **must be** provided:

PERSON PROTECTED:	LOCAL CASE NUMBER(S):		
LAST NAME:	FIRST NAME:	MI:	

EXISTING SUPPORT ORDER FOR:	LOCAL CASE NUMBER(S):		
LAST NAME(S):	FIRST NAME:	MI:	

ISETS & QUEST CASE INFORMATION FORM FOR ST. JOSEPH PROBATE COURT

CAUSE NUMBER:

CUSTODIAL PARENT (M/F)	SOCIAL SECURITY NUMBER: _____ - _____ - _____		
LAST NAME:	FIRST NAME:	MI:	
DATE OF BIRTH ____/____/____	Sex F/M	Ethnic Group A B C I O R S U W	
ADDRESS:			
CITY:	STATE:	ZIP:	

NON-CUSTODIAL PARENTS (M/F)	SOCIAL SECURITY NUMBER: _____ - _____ - _____		
LAST NAME:	FIRST NAME:	MI:	
DATE OF BIRTH ____/____/____	Sex F/M	Ethnic Group A B C I O R S U W	
ADDRESS:			
CITY:	STATE:	ZIP:	

OTHER PERSON WITH CUSTODY (M/F)	SOCIAL SECURITY NUMBER: _____ - _____ - _____		
LAST NAME:	FIRST NAME:	MI:	
DATE OF BIRTH ____/____/____	Sex F/M	Ethnic Group A B C I O R S U W	
ADDRESS:			
CITY:	STATE:	ZIP:	

DEPENDENT NO. 1	SOCIAL SECURITY NUMBER: _____ - _____ - _____		
LAST NAME:	FIRST NAME:	MI:	
DATE OF BIRTH ____/____/____	Sex F/M	Ethnic Group A B C I O R S U W	Emancipated YES / NO
ADDRESS:			
CITY:	STATE:	ZIP:	

DEPENDENT NO. 2	SOCIAL SECURITY NUMBER: _____ - _____ - _____		
LAST NAME:	FIRST NAME:	MI:	
DATE OF BIRTH ____/____/____	Sex F/M	Ethnic Group A B C I O R S U W	Emancipated YES / NO
ADDRESS:			
CITY:	STATE:	ZIP:	