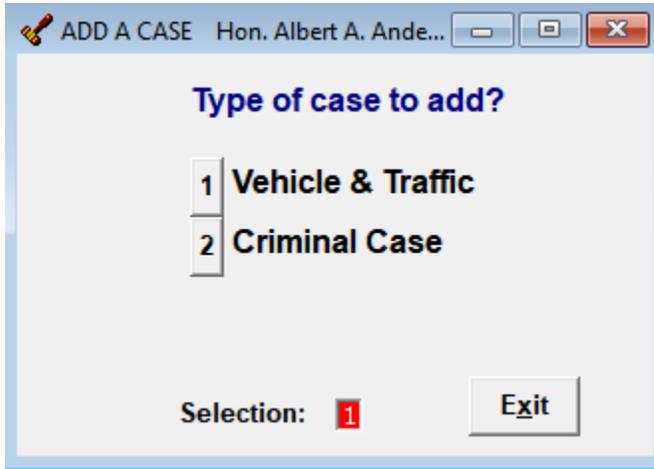


ADDING A NEW CAP CASE INTO THE PROGRAM

Click on **Cases** and **Add New Case** from the top task bar.
Choose the case type by clicking on the corresponding number.



Enter in the **Receiving Court** information at the top of the screen by clicking on the lookup key at the end of the line and selecting the Court from the list. Then enter in the **Defendant** name information. *If the defendant has already been in your court on other charges, type in the last name and click **Name Lookup**. Select the correct name from the list.*

The screenshot shows the "Add New Criminal Case" form with the title bar "Add New Criminal Case Index_No: Temp5713". At the top left is an "Exit" button. The form has several input fields: "Receiving Court:", "ORI:", "Name", "Charges", and "Notes". Below these are fields for "DEFENDANT: Last", "First", "Address", "City", "DOB", "Motorist", "Phone", "Email", "Tickler", and "Alerts". A dropdown menu is open, showing a list of courts and their ORI numbers. At the bottom, there is a "Name Lookup" button.

Name	Charges	Notes
DEFENDANT:		
Last		
First		
Address		
City		
DOB		
Motorist		
Phone		
Email		
Tickler		
Alerts		

Court Name	ORI
Bristol Town Court	NY034071J
Canadice Town Court	NY034131J
Canandaigua Town Court	NY034161J
Clifton Springs Village C	NY034031J
East Bloomfield Town Cour	NY034311J
Farmington Town Court	NY034081J
Geneva Town Court	NY034051J

Next, click the **Charges** tab to enter in the violation information. When the section is entered, the description fills in from the Laws database built into the program. *If the charge is speeding enter the speed in the **Description** field following the word **Speeding** e.g.: “Speeding 68/55”. If the charge is a **Town or Village Ordinance**, add “**T/O**” or “**V/O**” to the **Description** field. If the charge is a **parkway violation**, add “**PKWY**” to the **Description**.*

Click **Add Another Charge** to continue adding charges for this defendant.

Click on the **Notes** tab (if applicable) to enter any free form comments to save on the case. Click on **Exit** to save information and leave the screen.

Add New Criminal Case Index_No: Temp0791

Exit Receiving Court: **Richmond Town Court** ORI: **NY034141J**

Name	Charges	Notes
Statute/Section	Description	C/C/D Counts Attempt
VTL 1192 02	DWI 08 OF 1PCT	U M 0 1 N

Attorney: _____ Officer: _____ Prosecutor: _____

Ticket No. **2B917ZQPZF** 501# _____

Crime Date **04/24/2018** Reference# _____

Arrest or Ticket Date **04/24/2018**

Next Court Date **04/24/2018** Action Code **001** 1st Appearance V&T

Time: _____

Comment: _____ Arraigned Date: ____/____/____

Add Another Charge

Click on **Open Case** to access the Case Information screen.

ADD A CASE Hon. Albert A. Anderson

Type of case to add?

1 Vehicle & Traffic
2 Criminal Case

Selection: **2**

Options For Previous Case.
Case Number: 18049002
Defendant: Jane A. Smith

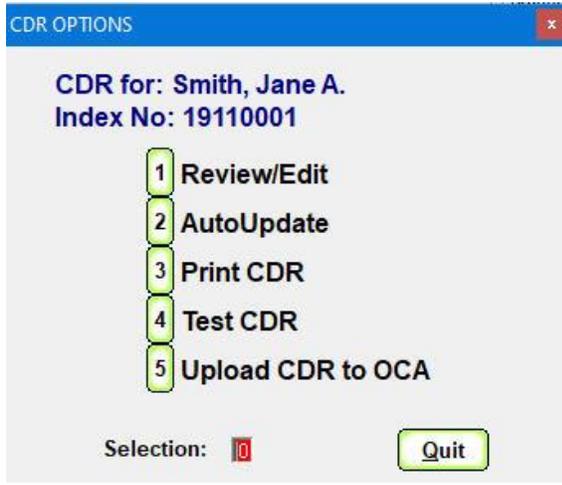
Case #18049002.01 - Smith, J INFORMATION SCREEN (case# order)

Name Jane A. Smith	Sex F	DOB 09/21/1980	Attorney Public Defender, Ont ?
Address 123 Elm Street Victor, NY 14564	Motorist ID #	Prosecutor	Officer
Name & Address	Letters & Forms	Charge	Force Judge
CDR	Notes	DMV	SP AAA
Phone Number	Other Players	Modify Case	

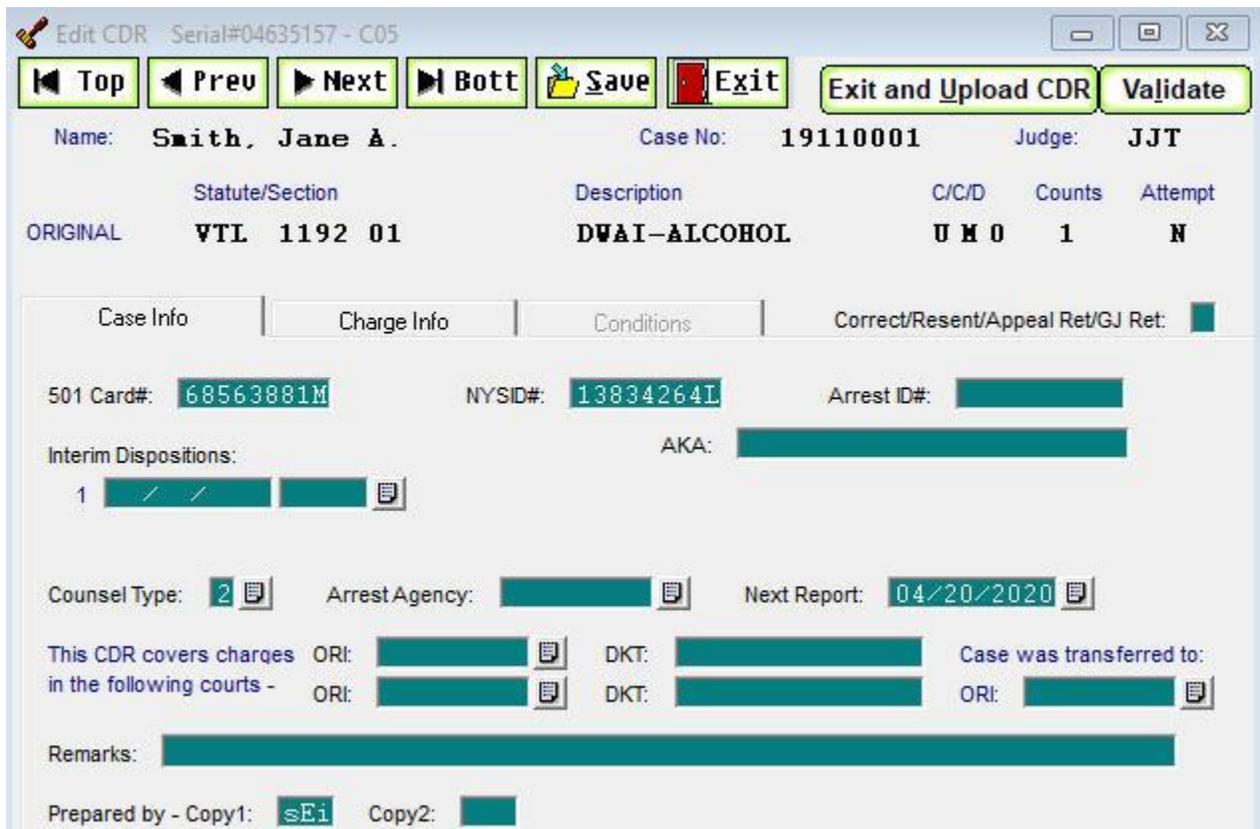
Statute/Section	Description	C/C/D	Counts	Attempt	Fine
VTL 1192 02	DWI 08 OF 1PCT	U M 0	1	N	0.00
			0	N	Civil Fee 0.00
Disposition	Charge 1 of 1	Ref #	SurCharge		0.00
Comment	Ticket #	2B917ZQPZF	SurCharge		0.00

Next Date	Action (001)	Crime	Arrest	Fines
04/24/2018	1st Appearance V&T	04/24/2018	04/24/2018	0.00
History	Time	Arraignment	Adjudication	Civil Fees 0.00
04/24/18	1st Appearance V&T	04/24/2018	/ /	SurCharge 0.00
		Sentence	Case Closed	Bail 0.00
		/ /	/ /	Other 0.00
				AmountDue 0.00

To enter in the CDR information click on the **CDR** button beneath the defendants address on the information screen. Click on number **1 Review/Edit** to enter in your information.



Enter in the **501 Card#**, **NYSID#** **Counsel Type**, and **Next Report**. Then click on the **Exit and Upload CDR** button. For details on the Automatic CDR Upload Process, please see [Automatic CDR Upload Process](#).

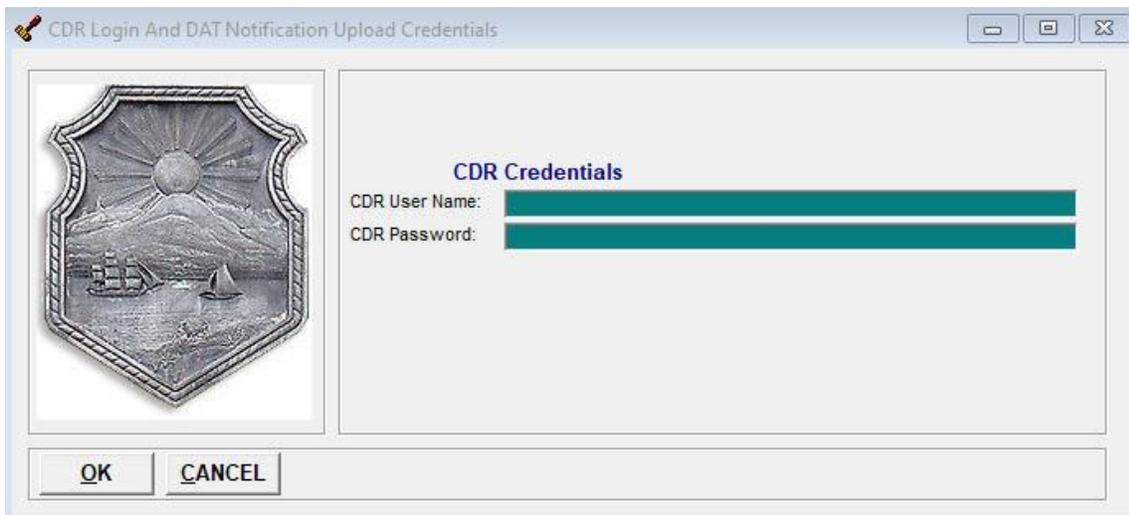


The program will then check for any possible errors. If there are any errors, select **Cancel Upload**. This will return to the edit CDR screen where the error can be corrected. The other option is to ignore the errors by selecting **Upload With Errors**.

1 POSSIBLE CDR ERROR FOUND



If there are no errors found the CDR Credentials login screen will appear. Similarly, if **Upload With Errors** was selected the CDR Credentials screen will appear. Enter in your **CDR User Name** and **CDR Password** (*this is the same information you would use to log into the OCA website*) then select **OK**.



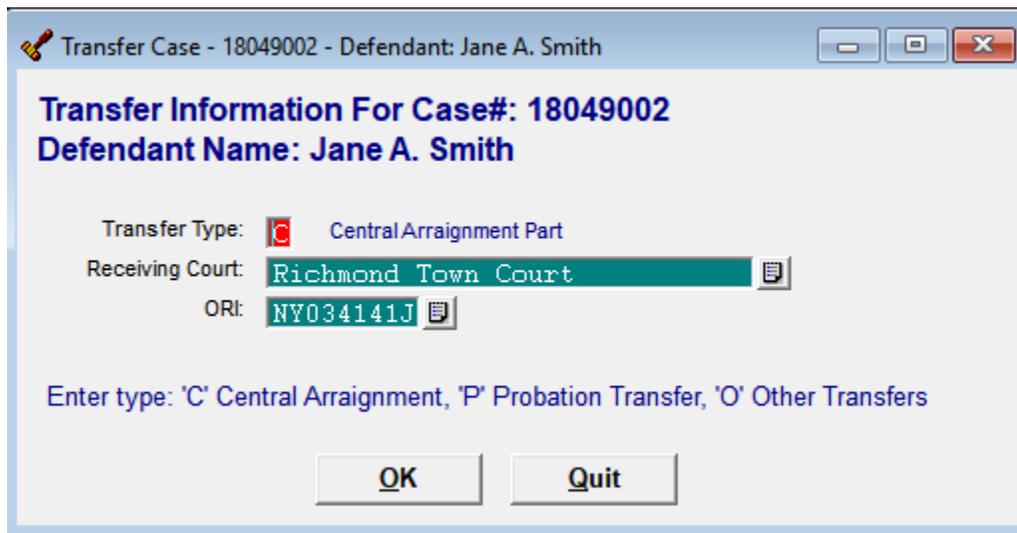
When the CDR has transmitted successfully the following message will appear



To transfer the case to the court of original jurisdiction, click on **Modify Case, Transfer Case to Another Court**.



Verify the information is correct and click on **OK**.



You will then receive verification that the case was successfully uploaded.



If the receiving court is NOT using the CourtRoom Program software, please contact the CourtRoom Program support staff at: 1-800-622-2522 option 1 then option 2.

The case is now closed and sealed.

Case #18049002.01 - Smith, J INFORMATION SCREEN (case# order)

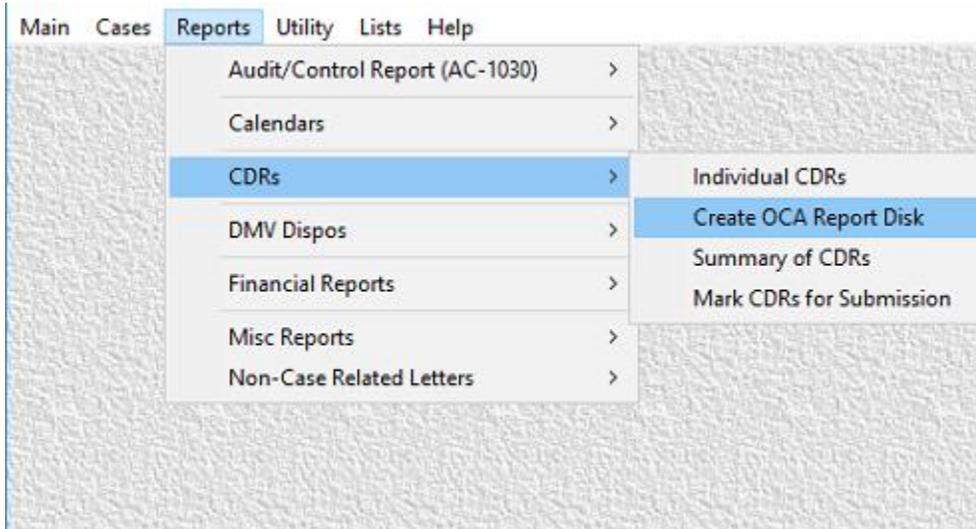
Name Jane A. Smith		Sex F	DOB 09/21/1980	Attorney Public Defender, Ont ?	
Address 123 Elm Street Victor, NY 14564		Motorist ID #		Prosecutor ?	
Name & Address		Letters & Forms		Officer ?	
CDR		Charge		Force SP	
		Notes		Judge AAA	
		DMV		Other Players	
		Phone Number		Modify Case	

Statute/Section	Description	C/C/D	Counts Attempt	Fine
				0.00
Sealed CAP				Civil Fee
Disposition: CAP Transfer				0.00
Charge: 1 of 1				SurCharge
Ref #: [REDACTED]				0.00
Ticket #: 2B917ZQPZE				0.00

Next Date 04/25/2018	Action (099) Disposed	Crime 04/24/2018	Arrest 04/24/2018	Fines 0.00
History		Arraignment 04/24/2018	Adjudication / /	Civil Fees 0.00
04/25/18 Disposed		Sentence / /	Case Closed 04/25/2018	SurCharge 0.00
04/25/18 CAP Transfer				Bail 0.00
04/24/18 1st Appearance V&T				Other 0.00
				AmountDue 0.00

If the CDR wasn't uploaded individually when entering in the CDR data, you would need to create the OCA report disk.

At the top of the screen click on **Reports, CDRs, and Create OCA Report Disk.**

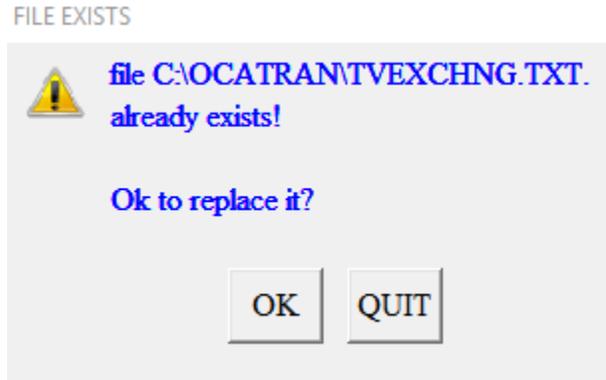


You have two options, the first is to create the file to submit at the OCA website; saving the TVEXCHNG.TXT file to the C:\OCATRAN folder. Or there is an option to **Upload CDR to OCA.**



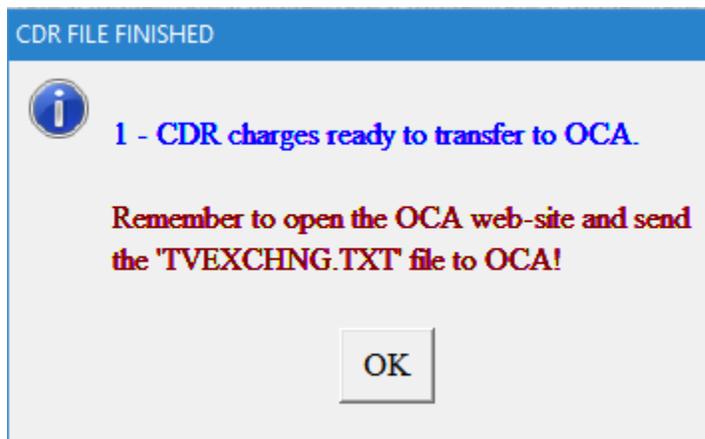
If the first option is preferred, uploading the TVEXCHNG.TXT file at the OCA website the following message may appear, this message is normal.

Click on **OK**.

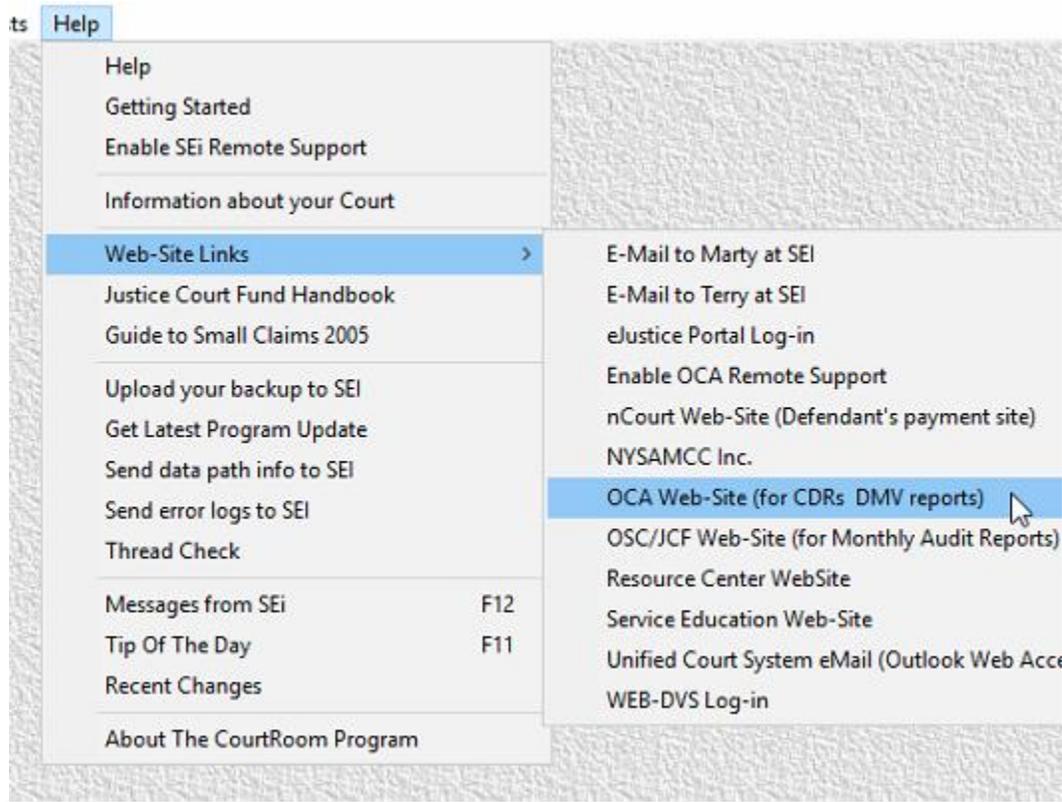


This screen is confirming the number of charges in the file created and it is ready to be uploaded to OCA.

Click on **OK**.



To upload the file to OCA, click on **Help, Web-Site Links**, and select **OCA Web-Site (for CDR DMV reports)**.



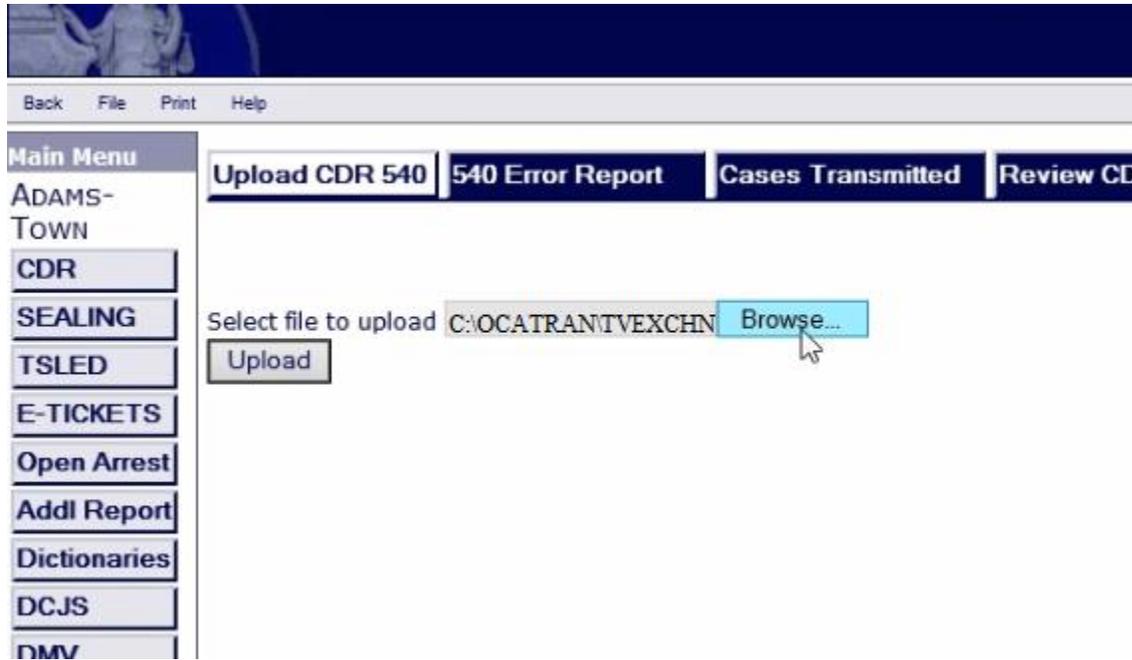
This will bring you to the UCS login screen.
Enter in your **User Name** and **Password** and click on **Sign In**.

Welcome to the New York State Unified Court System

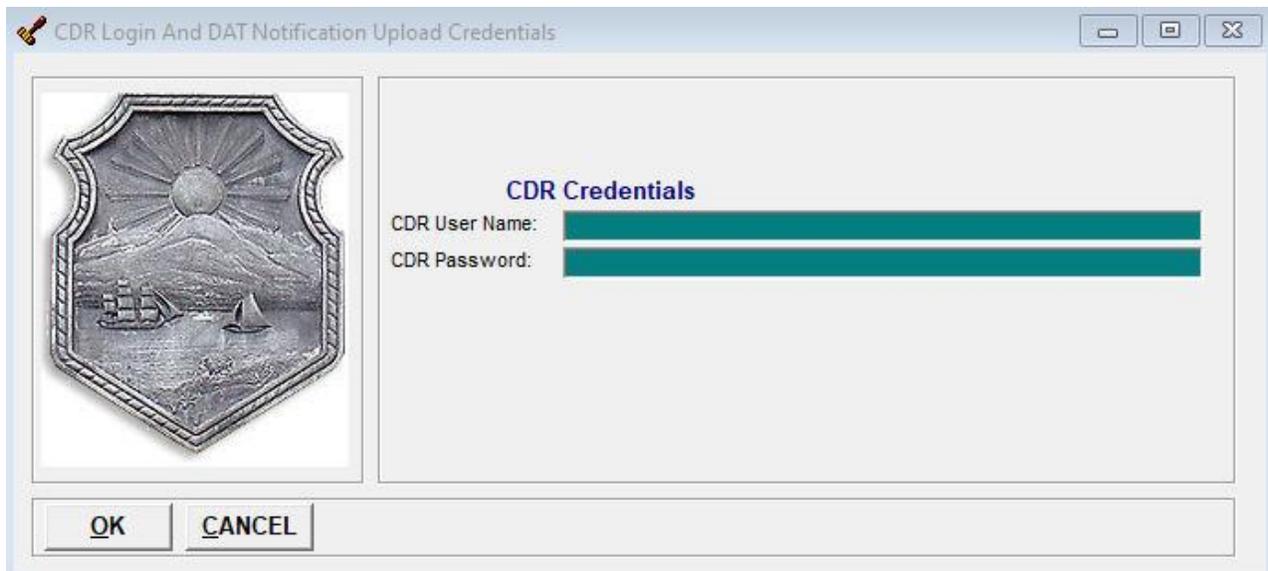
A screenshot of the login screen for the New York State Unified Court System (UCS). The window title is 'UCS - CDR'. On the left is the state seal of New York. On the right, there are two input fields: 'User Name' and 'Password'. Below the 'Password' field is a 'Sign In' button. The background of the login screen features a faint image of the state seal and the text 'State of N'.

York State Unified Courts System(UCS).
is system is not permitted and may constitute a crime. Such use may subject you t

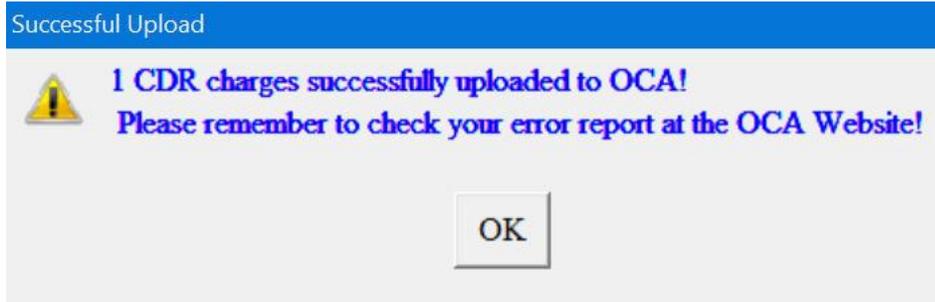
Click on the **CDR** button in the menu on the left.
Then click on the **Browse** button. You will find your **TVEXCHNG.TXT** file in the **C:\OCATRAN** folder. Select the **TVEXCHNG.TXT** file and then click on **Upload**.



If the second option is preferred, to **Upload CDR to OCA** from within the CourtRoom Program the CDR Credentials screen will appear. Enter in the **CDR User Name** and **CDR Password** that would normally be used to log into the OCA website and select **OK**.



A successful upload will result in the following message



If an error should result, please contact the CourtRoom Program support staff at 1-800-622-2522 Option 1 then option 2.