



GREEN LAKE COUNTY

571 County Road A, Green Lake, WI 54941

Original Post Date: 08/01/2019

Amended* Post Date:

The following documents are included in the packet for the Administrative Committee on August 5, 2019:

- 1) Amended Agenda
- 2) Minutes from 05/06/2019
- 3) Budget Adjustment for Corporation Counsel
- 4) Resolution Relating to Consortium Agreement for the Chief Elected Officials of the Fox Valley Workforce Development Area
- 5) Agreements with Fox Valley Workforce
- 6) CountyLaw Policy and Procedure
- 7) Data Breach Response Plan
- 8) Department Reports
 - a. Corporation Counsel
 - b. County Administrator
 - c. County Clerk
 - d. IT
 - e. Register of Deeds
 - f. Treasurer



GREEN LAKE COUNTY OFFICE OF THE COUNTY CLERK

Elizabeth Otto
County Clerk

Office: 920-294-4005
FAX: 920-294-4009

Administrative Committee Meeting Notice

***Date: August 5, 2019 Time: 6:00 PM
Green Lake County Government Center,
County Board Room, 571 County Rd A, Green Lake WI***

Amended AGENDA*

Committee Members

*Harley Reabe, Chairman
Larry Jenkins
Dennis Mulder
Katie Mehn
Brian Floeter*

Elizabeth Otto, Secretary

1. Call to Order
2. Certification of Open Meeting Law
3. Pledge of Allegiance
4. Minutes: 05/06/2019
5. Public Comments (3 Min. Limit)
- ~~6. *Correspondence~~
7. Budget Adjustments/Line Item Transfer
 - Corporation Counsel Training Revenue
8. Resolutions
 - Resolution Relating to Consortium Agreement for the Chief Elected Officials of the Fox Valley Workforce Development Area
9. Corporation Counsel County Law Policy and Procedures
10. Review and Approve Data Breach Response Plan
11. *Discussion and Possible Action on Chairman Salary and Supervisor Per Diems for 2020-2022 Term
12. 2020 Budget Discussion
13. Department Reports
 - Corporation Counsel
 - County Administrator
 - County Clerk
 - IT
 - Register of Deeds
 - Treasurer
14. Committee Discussion
 - Future Meeting Dates: November 4, 2019 at 5:15 pm
 - Future Agenda items for action & discussion
15. Adjourn

*Stricken from the agenda

Kindly arrange to be present, if unable to do so, please notify our office. Sincerely, Elizabeth Otto

Please note: Meeting area is accessible to the physically disabled. Anyone planning to attend who needs visual or audio assistance, should contact the County Clerk's Office, 294-4005, not later than 3 days before date of the meeting.

ADMINISTRATIVE COMMITTEE MEETING

May 6, 2019

The meeting of the Administrative Committee was called to order by Chairman Harley Reabe at 6:00 PM on Monday, May 6, 2019 in the County Board Room, Government Center, 571 County Road A, Green Lake, WI. The requirements of the open meeting law were certified as being met. The pledge of allegiance was recited.

Present: Harley Reabe
Brian Floeter
Larry Jenkins
Katie Mehn
Dennis Mulder

Absent:

Other County Employees Present: Liz Otto, County Clerk; Amanda Toney, Treasurer; Bill Hutchison, IT Director; Cathy Schmit, County Administrator; Sarah Guenther, Register of Deeds; Sheriff Mark Podoll (6:05)

MINUTES

Motion/second (Mehn/Jenkins) to approve the minutes of February 11, 2019 as presented with no errors or corrections. All ayes. Motion carried.

PUBLIC COMMENTS – none

CORRESPONDENCE – none

BUDGET ADJUSTMENTS

- Register of Deeds – request to decrease the Laredo Fidlar expense and revenue account by \$2,360

Register of Deeds Sarah Guenther explained that due to a contract cancelation she will have approximately \$1,536 less in revenue than budgeted.

Motion/second (Mulder/Floeter) to approve the budget adjustment and forward to Finance. All ayes. Motion carried.

RESOLUTIONS/ORDINANCES - none

DEPARTMENT REPORTS

- Corporation Counsel
- County Administrator
- County Clerk
- IT
- Register of Deeds
- Treasurer

All reports were reviewed and discussed by the Committee.

COMMITTEE DISCUSSION

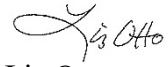
Future Meeting Date: Regular Meeting- August 15, 2019 at 5:15 PM

Future Agenda Items:

ADJOURNMENT

Chair Reabe adjourned the meeting at 6:16 PM.

Submitted by,



Liz Otto
County Clerk

DRAFT

GREEN LAKE COUNTY

Notice of Budgetary Adjustment

Unanticipated Revenue or Expense Increase or Decrease Not Budgeted

Date: June 3, 2019
 Department: Corporation Counsel
 Amount: \$191.40
 Budget Year Amended: \$2,200.00

Source of Increase / Decrease and affect on Program:
 (If needed attached separate brief explanation.)

UW-GB Behavioral Training Partnership added one additional training seminar for Corporation Counsel to co-train at \$1,100.00 per seminar. This is additional revenue that also requires an adjustment for travel to compensate the County for use of Corporation Counsel's personal vehicle. See attached mileage calculation for explanation of mileage costs

Revenue Budget Lines Amended:

Account #	Account Name	Current Budget	Budget Adjustment	Final Budget
19-100-03-48181-000-000	Training Revenue	\$ 3,834.00	\$ 1,100.00	\$ 4,934.00
				\$ -
				\$ -
				\$ -
Total Adjustment			\$ 1,100.00	

Expenditure Budget Lines Amended:

Account #	Account Name	Current Budget	Budget Adjustment	Final Budget
19-100-03-51320-330-000	Travel	\$ 804.27	\$ 191.40	\$ 995.67
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
Total Adjustment			\$ 191.40	

Department Head Approval: Dawn M. Klockow 6/20/19
 Date Approved by Committee of Jurisdiction: _____

Following this approval please forward to the County Clerk's Office.

Date Approved by Finance Committee: _____
 Date Approved by County Board: _____

Per WI Stats 65.90(5)(a) must be authorized by a vote of two-thirds of the entire membership of the governing body.

Date of publication of Class 1 notice of budget amendment: _____

Mileage Calculation for
Budget Adjustment mileage

Date	Origin point	Destination point	Mileage	IRS rate	Cost of Mileage
6/11/2019	571 County Road A, Green La	610 Gibson Street, Eau Claire	165	0.58	\$ 95.70
6/12/2019	610 Gibson Street, Eau Claire	571 County Road A, Green Lake	165	0.58	\$ 95.70

Total mileage cost

\$ 191.40

RESOLUTION NUMBER -2019

RESOLUTION RELATING TO CONSORTIUM AGREEMENT FOR THE CHIEF ELECTED OFFICIALS OF THE FOX VALLEY WORKFORCE DEVELOPMENT AREA

The County Board of Supervisors of Green Lake County, Green Lake, Wisconsin, duly assembled at its regular meeting begun on the 20th day of August 2019, does resolve as follows:

1 **WHEREAS**, Green Lake County participates in the Fox Valley Workforce Development
2 Area under §66.0301(2) Wis. Stats; and,

3 **WHEREAS**, the Fox Valley Workforce Development Area's purpose is to increase
4 occupational skills, employment, job retention and earnings, and as a result, improve
5 the quality, reduce welfare dependency and enhance the productivity and
6 competitiveness of the workforce within Green Lake County and the other counties who
7 are members; and,

Majority vote is needed to pass.

Roll Call on Resolution No. -2019

Submitted by: Administrative
Committee

Ayes , Nays , Absent , Abstain

Passed and Adopted/Rejected this 20th
day of August 2019.

Harley Reabe, Chair

Dennis Mulder, Vice-chair

County Board Chairman

Larry Jenkins

ATTEST: County Clerk

Katie Mehn

Approve as to Form:

Corporation Counsel

Brian Floeter

8 **WHEREAS**, the current Consortium Agreement between the Counties of Calumet, Fond
9 du Lac, Green Lake, Waupaca, Waushara and Winnebago Counties has expired and
10 requires renewal. The new Consortium Agreement is attached hereto; and,

11 **WHEREAS**, the Green Lake County Corporation Counsel has reviewed and approved
12 the Consortium Agreement as to form.

13 **NOW THEREFORE BE IT RESOLVED THAT** the Green Lake County Board of
14 Supervisors authorizes Chairman Harley Reabe to execute the Consortium Agreement
15 for the Chief Elected Officials of the Fox Valley Workforce Development Area on behalf
16 of Green Lake County for the fiscal year beginning July 1, 2019.



JOINT AGREEMENT

FOR THE WORKFORCE DEVELOPMENT BOARD and CHIEF ELECTED OFFICIALS

OF THE FOX VALLEY WORKFORCE DEVELOPMENT AREA

THIS AGREEMENT, made and entered into by and between the Fox Valley Workforce Development Board of Directors (FVWDB), a body created in accordance with and pursuant to a Chief Elected Officials (CEO) Consortium Agreement, by and between the Wisconsin counties of Calumet, Fond du Lac, Green Lake, Waupaca, Waushara and Winnebago (hereinafter referred to as the "CEO").

WITNESSETH:

WHEREAS, the Chief Elected Official (CEO) is the legal representative of the Consortium formed under Section 106(a)(4)(A) of Public Law 113-128 (hereinafter referred to as "the Act"); and

WHEREAS, the Chief Elected Official (CEO) is the appointing authority for the FVWDB under Section 107(c)(1) of Act; and

WHEREAS, it is the responsibility of the FVWDB to provide policy guidance for, and exercise oversight with respect to activities under the Act in this Fox Valley Workforce Development Area in partnership with the CEO; and

WHEREAS, the CEO and the FVWDB are required to enter into operational agreements under Section 107(d) of said Act;

NOW THEREFORE, in consideration of the above premises and the mutual covenants of the parties hereinafter set forth, the receipt and sufficiency of which is acknowledged by each party for itself, the CEO and the FVWDB do agree as follows:

I. Modifications of the Workforce Innovation and Opportunity Act Plan:

1. Modification of the Plan shall require joint approval of the FVWDB and the CEO in accordance with Section VI (M) of this agreement. Either body may request modification of the Plan. Such requests shall be forwarded from the requesting body to the chairperson of the other body in keeping with Section VII (A) of this agreement.
2. FVWDB will negotiate and reach agreement on local performance measures with the Wisconsin Department of Workforce Development (DWD) as outlined in the FVWDB By-Laws.
3. FVWDB conducts oversight of One-Stop System, Dislocated Worker, Adult and Youth, and employment and training activities in partnership with Chief Elected Official (CEO).

4. FVWDB will select a One-Stop Operator with the agreement of the Chief Elected Official (CEO).

II. Selection of the Grant Recipient and Administrative Entity: In accordance with Section 107(c)(3)(A) of the Act, the FVWDB and the CEO agree that:

- A. Fox Valley Workforce Development Board, Inc., shall function as the Administrative Entity responsible for carrying out the goals and objectives set forth in the Plan, for the duration of this agreement.
- B. Fox Valley Workforce Development Board, Inc., shall function as the Grant Recipient of funds under the Act.

III. Duties of the FVWDB as Grant Recipient:

- A. The FVWDB shall administer and operate programs in accordance with the Plan.
- B. The FVWDB shall be responsible for all receipts and disbursements relating to the Plan.
- C. The FVWDB shall review all contracts for purposes of verifying that funds are expended in accordance with the grantor's requirements and the Plan. The FVWDB shall utilize reasonable audits, desk reviews, legal services and other inquiries to effectuate the goals of this paragraph.
- D. The FVWDB shall provide the CEO an evaluation of every contract receiving funds under the Plan. Said evaluation shall include, but is not limited to, a review of the expenditures made under the contracts entered into pursuant to the Plan and an assessment of such contracts in meeting their proposed goals.
- E. The FVWDB shall implement the Plan by entering into contracts with providers of services. Said contracts shall set forth the duties incumbent of the service provider, the goals of each project undertaken by the provider and financial terms of the contract. All contracts shall be approved by the FVWDB and/or CEO prior to their execution as required by governing documents.
- F. The FVWDB shall allocate the funds due the Fox Valley Workforce Development Area for provision of services under the Workforce Innovation and Opportunity Act. The FVWDB shall, in making of such allocations, conform to the terms and conditions of the Plan. Further, the FVWDB shall only allocate funds to those service provider contractors authorized by the FVWDB and CEO. The Administrator of the FVWDB shall sign all such approved contracts on behalf of the FVWDB. The FVWDB shall not recommend the awarding of any funds to any contractor in which the FVWDB has a financial interest, either direct or indirect, unless said interest is disclosed in writing to the CEO and both the FVWDB and CEO consent to such allocations.
- G. The FVWDB shall monitor the activities of all contractors and their subcontractors to assure that funds are expended legally, properly and efficiently. The FVWDB shall take all reasonable actions to prevent, halt and deter misuse of any funds allocated under the Plan.
- H. The FVWDB will provide assistance in formulating the terms of the Plan and any modifications or update to said Plan. Such duties include, but are not limited to, education of CEO of the substantive requirements of the Plan, advising CEO of options for the Plan, conducting research

and marshaling information necessary to direct the Plan's goals toward identified needs within the Fox Valley Workforce Development Area, preparing drafts, final versions and copies of the Plan to the CEO, and making necessary contacts with the Department of Workforce Development Division of Employment and Training (DWD/DET) to secure approval of the Plan.

- I. The FVWDB shall maintain accounts, books, records and inventory controls sufficient to allow compliance and financial audits of its services under this or any other contract between the parties hereto.
- J. At the termination of all contracts funded under the Plan, the FVWDB to the extent reimbursed shall conduct close-out activities to determine whether the contractors' operations were in accordance with the terms and goals of the Workforce Innovation and Opportunity Act.
- K. The FVWDB shall obtain prior to the execution of this Agreement and maintain in force, without lapse during the term of this Agreement, errors and omissions, bonding and general liability insurance policies. The CEO and the FVWDB shall be named as additional insureds in the general liability and errors and omissions policies. Minimum limits of liability on the errors and omissions policy shall be \$300,000 per occurrence, \$300,000 aggregate. Minimum limits on the general liability policy shall be \$500,000 combined personal injury and property damage per occurrence and \$500,000 aggregate.
- L. The FVWDB shall draft a grievance procedure in compliance with Section 144 of the Workforce Innovation and Opportunity Act to be approved by the FVWDB and CEO prior to its implementation.

IV. Oversight:

- A. The FVWDB is authorized to provide oversight, including review, monitoring and evaluation of the programs conducted under the Plan in accordance with established procedures. To carry out its functions under the Act, the FVWDB:
 - 1. Shall prepare and approve a proposed budget for programs and administration. The FVWDB shall submit the proposed budget to the CEO for review at least 7 days prior to the commencement of the budget year. Adoption of the budget shall be in accordance with Section VI (M). Amendments to the budget, outside of the annual budget meeting, must be presented to the CEO for consideration and shall require approval by a two-thirds majority of the members present from the CEO.
 - 2. May hire staff, if the proposed staff position(s) is included in the adopted budget.
 - 3. May incorporate, with the approval of both the FVWDB and the CEO.
 - 4. May solicit and accept contributions and funds from other public and private sources.
- B. The exercise of powers and duties under Section V(A)(1-4) of this agreement shall be in keeping with agreements established under Section III above and is subject to review by the CEO. The CEO may request invocation of Section VI(J) of this agreement to resolve any disagreements over the exercise of said powers.

- C. The CEO reserves the right to oversee the general progress and conduct of the Plan. To that end, the FVWDB agrees to submit to such audits as the CEO may from time to time require. The CEO agrees that such audits shall only be instituted as necessary to carry out its responsibilities to insure the appropriate utilization of funds under the Act.
- D. The FVWDB agrees to provide quarterly reports to the CEO indicating progress toward the completion of goals and objectives of the Plan. Such reports shall be due within 30 days of the end of the preceding quarter. The FVWDB further agrees to, submit such reports as may be outlined in any subsequent agreements pursuant to Section III above.

V. Operating Procedures:

- A. By-Laws: The FVWDB and the CEO may establish By-Laws and/or operating procedures, for their respective organizations, which are consistent with the provisions of this or any other bilateral agreement between the affected parties. In the event that any such By-Laws or procedures shall be found to be in conflict with the provisions of this or any other bilateral agreements, the provisions of said agreements shall prevail.
- B. FVWDB Membership Criteria: Members of the FVWDB are appointed to represent sectors of the service delivery area as outlined in Section 102 of the Act and the initial plan of appointment approved by the CEO. All members of the FVWDB shall be employed or reside within the Fox Valley Workforce Development Area. Any change in employment or other status which affects the representative status of a FVWDB member shall be forwarded to the CEO within 30 days of said change. Changes in status which render a FVWDB member no longer representative of the sector from which originally appointed shall result in the CEO declaring said position vacant.
- C. Alternates: In the course of the FVWDB's operation, alternate FVWDB members shall not be appointed or designated.
- D. Size of the FVWDB: Under Section 107 of the Act, the FVWDB may determine its own size following its being certified and convened. The FVWDB agrees that it will not exercise its right to alter its size without the consent of the CEO.
- E. Cause for Removal: Any member(s) of the FVWDB may be removed there from by the CEO for cause, including the following:
 - 1. Those causes specified in Section 17.16(2), Wisconsin Statutes.
 - 2. Failure of a FVWDB member to fulfill in timely and proper manner his or her obligations under this agreement, or if the FVWDB member shall violate any of the covenants or stipulations of this agreement. However, nothing herein shall be construed to permit removal of any FVWDB member for failure to concur in any proposed agreement with the CEO.
 - 3. For conviction of any federal or state felony.
 - 4. Absenteeism will be addressed through FVWDB By-Laws.
 - 5. For changes in status that affect representation as outlined in Section VI(B) of this agreement.

F. Filling of Vacancies: Vacancies in the FVWDB shall be filled by appointment by the CEO in accordance with the Act, the Consortium Agreement and By-Laws in effect at the time of the vacancy.

G. Conflict of Interest:

1. Members of the FVWDB or CEO must maintain the public trust for use of the federal and state funds for the purpose of carrying out program requirements including the responsibility to maintain the reputation and integrity of the program.
2. The FVWDB will establish written policies in its By-Laws, to adhere to conflict of interest policies established by the state.
3. No member of the FVWDB, and its sub-groups thereof nor the CEO shall cast a vote on the provision of services by that member (or any organization of which that member is an owner, manager, employee, or agent) or vote on any matter which would provide direct financial benefit to that member or any organization of which that member is an owner, manager, employee, or agent. The FVWDB or its subgroups and CEOs may require members to leave the room during discussion and voting on issues with which they have a conflict of interest. This requirement in and of itself does not preclude FVWDB members or their businesses from participating in contracts.
4. The FVWDB will have on file a disclosure form which is signed by each FVWDB member and staff, and each grantee. The disclosure statement must include but not be limited to the organizational and fiduciary affiliations of the individual or the individual's immediate family which may present a potential conflict of interest for that individual.

H. Maintenance of Effort: To insure maintenance of effort no contracts for grants to service providers shall be in violation of the maintenance of effort requirements of federal law or regulations or rules of the DWD/DET.

I. Grievance Procedures: Section 181 (c) of the Act requires such administrative entity, contractor and grantee under the Act to establish and maintain a grievance procedure for resolution of grievances and complaints about its programs and activities from participants, subgrantees, subcontractors and other interested persons. A grievance panel, consisting of two disinterested members of the FVWDB selected by the FVWDB Chairperson, and the CEO (or his designee) shall hear all SDA-level grievances filed within this SDA.

J. Liaison Committee: A Liaison committee consisting of two members of the CEO appointed by the CEO and two members of the FVWDB appointed by the Chairperson of the FVWDB shall be convened upon the joint call of the Chairpersons of the CEO and FVWDB to resolve conflicts of issues of mutual concern. Said Chairpersons shall jointly appoint one of the appointees as chairperson and issue the charge to the committee. The findings of the Committee shall be binding on the FVWDB and the CEO. The disagreement between the two bodies shall be resolved according to the Liaison Committee's recommendations. Upon issuance of its report, the committee shall be dissolved.

K. Indemnification:

1. The FVWDB and CEO recognize the need to protect all members of the FVWDB and CEO against loss, liability or damages that may result from their joint and separate actions in

performing responsibilities under the Act. The CEO and FVWDB agree that adequate insurance shall be provided.

2. The Administrative Entity shall procure and maintain in force for the duration of the agreement, Workers Compensation Insurance including Employers Liability, Commercial General Liability, Business Auto Liability, (owned, non-owned and hired autos), Excess, (Umbrella) Liability, & Management Liability (Directors & Officers Liability), which covers CEO, FVWDB, and staff.
3. The FVWDB agrees during the term of this agreement to indemnify and save harmless the CEO, its successors and assigns, from and against any and every claim, demand, suit, payment, damage, loss, costs and expense that the CEO, its successors and assigns, may hereafter suffer, incur, be put to, pay or lay out by reason of the FVWDB performing its obligations, under this agreement provided, however, that the provisions of this section shall not apply to claims, demands, suits, payments, damages, losses, costs and expenses caused by or resulting from the sole negligence of the CEO, its successors or assigns.

L. Efficiency: The FVWDB and the CEO shall commence, carry on and complete their obligations under this agreement with all deliberate speed and in a sound, economical and efficient manner, in accordance with this agreement and all applicable laws.

M. Voting:

1. All approvals under this agreement shall require approval of a majority of the members present at a meeting of such said bodies, unless a vote of greater than a simple majority is called for in the By-Laws of the respective body.
2. Votes on matters which require concurrence of the FVWDB and the CEO shall be by roll call and recorded in the minutes of the respective bodies.
3. At no time shall the FVWDB or the CEO vote as a single unit.
4. Absentee voting is not allowed by either the FVWDB or the CEO.

N. Quorum: At minimum, a majority of the current membership of the FVWDB and the CEO is required to be in attendance to constitute a quorum for purposes of conducting business by each of the respective bodies.

VI. General Administrative Provisions:

A. Delivery of Notices and Reports: Notices and reports required by this agreement shall be deemed delivered as of the date of postmark if deposited in a United States mailbox, first class postage attached, addressed to a party's address, ("sent" time if electronic communication or fax is utilized), to notify the other party in writing within a reasonable time:

1. To the CEO addressed to the current secretary of the Chief Elected Officials Board of Commissioners.
2. To the FVWDB addressed to the current administrator of the Fox Valley Workforce Development Board.

- B. Open Meetings Required: The provisions of Subchapter V of Chapter 19, Wisconsin Statutes, regarding open meetings of governmental bodies shall apply to all meetings and proceedings of the FVWDB and the CEO, including those of its formally constituted subunits. The provisions of 19.96, Wisconsin Statutes, specifically shall apply. Telephone conferences and video conferences are permitted with all in attendance identified.
1. The FVWDB and the CEO shall maintain copies of records of their activities in all major areas, including all meeting agendas and minutes, contracts, fiscal and management documentation.
 2. The administrative entity shall be the custodian of the public records of the FVWDB and of the CEO, or
 3. An official of the county represented by the CEO shall be designated by the CEO as the custodian of the public records of the CEO. In the event that any succeeding CEO is from another county, the CEO records shall be transferred to that county in the custody of the official thereof designated by the then current CEO.
 4. The designated records custodian shall comply with the public records request in accordance with the requirements set forth in Wisconsin Statute 19.35. In case of doubt, authorization for release of any public records of the FVWDB or the CEO shall be authorized by the Chairpersons of the respective bodies.
 5. The CEO and the FVWDB shall have complete access to the Workforce Innovation and Opportunity Act records of both bodies except this agreement wherein persons not members of the respective bodies may be excluded.
 6. The FVWDB and the CEO shall send copies of all agendas and minutes thereof to the members of both bodies at all times.
- C. Nondiscrimination: During the term of this agreement, the FVWDB, the CEO, the Administrative Entity and Grant Recipient agree not to discriminate against any person, whether a recipient of services (actual or potential), an employee, or an applicant for employment on the basis of factors prohibited by federal or state law, including Section 167 of the Act and Section 111.31, Wisconsin Statutes. The aforementioned agree to post in conspicuous places, available to all employees and applicants for employment and all recipients of services, actual or potential, notices setting forth the provisions of this agreement as they relate to nondiscrimination. The aforementioned shall, in all solicitations, for employment placed on their behalf, state that the aforementioned are "Equal opportunity Employers".
- D. Term of the Agreement: The term of this agreement shall commence on the date of the execution of this Agreement and shall continue through June 30th of the following year. This agreement shall be reviewed annually by FVWDB and CEOs and renewed by July 1 unless either party hereto gives written notice to the other sixty (60) days prior to the annual date of renewal stating that said party wishes to renegotiate all or any part of this agreement.

E. Amendment of Agreement:

1. Either party may propose amendments to this agreement at any time. Requests for amendment shall be authorized in accordance with the By-Laws of the body initiating the request. No proposed amendment may be considered by the body unless a written copy has been sent to the members of the body at least 10 days prior to consideration. An amendment to amendment(s) so proposed shall be in order.
2. Proposed amendments approved in accord with the above shall be mailed to the other party (in accord with VI(A) above) and shall be acted upon by that party no less than 10 days nor more than 30 days following receipt. No proposed amendment may be acted upon unless the text thereof has been sent to the member of the body at least 10 days prior to consideration.
3. The other party must respond with a written notice of concurrence or non-concurrence, or; a written request to negotiate under Section VI(J) above; within 10 days of consideration of the amendment.
4. No proposed amendment shall take effect until the nominating party has concurred with the amendment pursuant to Section V (M) of this agreement and has responded with a written notice of concurrence.

F. Assignment or Transfer: FVWDB shall not assign or transfer any interest or obligation in this agreement whether by assignment or novation, without prior written consent, except that the CEO does hereby consent to the assignment of this agreement to FVWDB's corporate successor which shall be bound in all respects as is the FVWDB.

G. Wisconsin Law Controlling: It is expressly understood and agreed to by the parties hereto that in the event of any disagreement or controversy between the parties, Wisconsin Law shall be controlling to the extent that there is no superseding federal law applicable.

H. Construction: Should any part, clause, paragraphs or sentence of this agreement be construed by a court of competent jurisdiction to be in violation of any federal or state law, rule or regulation, the remainder of the agreement shall remain in full force and effect unless amended in accord with the article.

I. Signatory Powers: The Chairperson of the FVWDB and the CEO, or in their absence or disability, the Vice Chairperson of the FVWDB and the Vice-Chairperson of the CEO shall be the signatories for the FVWDB and the CEO respectively when authorized to execute any document on behalf of said bodies by formal action thereof.

J. Entire Agreement: The entire agreement of the parties is contained herein and this agreement supersedes any and all prior oral agreements and negotiations between the parties relating to the subject matter thereof.

VII. Liability:

To the extent permitted by law, liability which arises pursuant to this Agreement shall be apportioned as follows:

- A. Workforce programs in the Fox Valley Workforce Development Area shall be administered prudently to minimize liability;
- B. Contracts for service delivery shall require indemnification by the contractor in the event that contractor errors or omissions result in disallowed costs or other liability;
- C. The FVWDB shall maintain adequate insurance as described in the Joint Agreement;
- D. To the extent permitted by law, FVWDB corporate funds and assets shall be used first to pay any remaining liability the Board is responsible for creating.
- E. The Consortium is liable for any misuse of the grant funds allocated to the local area under sections 128 and 133 of the Workforce Innovation and Opportunity Act.
- F. In the case of any misuse of grant funds allocated to the local area, the Consortium agrees to assume liability as follows (Section 667.705(c)): Liability will be determined based upon the particular facts of the situation as to the responsibility of individual Consortium members for the particular funds.
- G. Finally, after every possible method to reduce liability is exhausted, any remaining liability shall be apportioned between the six counties in proportion to their respective percentage of the workforce allocation in the year the disallowed cost or other liability occurred. For example, if \$10,000 in liability remained and a given county received an allocation of 10% of the workforce funding in the year the \$10,000 was expended, that county would be liable for \$1000.

VIII. Ratification of Agreement:

- A. This agreement shall require the approval of the FVWDB and the CEO by a majority vote of the members present at a meeting of each body, authorizing the execution of the agreement.
- B. Each signatory certifies that he/she has the legal authority of the governing body of the parties thereto to enter into this agreement, and the parties jointly and separately accept the responsibility for the operation of the program under the Act.

FVWDB is an Equal Opportunity Employer and Service Provider

A proud partner of the  American Job Center network

IN WITNESS WHEREOF, the duly authorized signatories for the CEO and the FVWDB have executed this agreement as of the day and date set forth below.

FOR THE CHIEF ELECTED OFFICIALS (CEO) CONSORTIUM OF THE FOX VALLEY WORKFORCE DEVELOPMENT AREA FOR FISCAL YEAR BEGINNING 7/1/19.

By: _____
Mark Harris, Chief Elected Official

_____ Date

FOR THE FOX VALLEY WORKFORCE DEVELOPMENT BOARD (FVWDB) OF THE FOX VALLEY WORKFORCE DEVELOPMENT AREA

By: _____
Aimee Hostettler, Chair

_____ Date



**WORKFORCE DEVELOPMENT
BOARD, INC.**

Building a world class workforce

**CONSORTIUM AGREEMENT
FOR THE CHIEF ELECTED OFFICIALS
OF THE FOX VALLEY
WORKFORCE DEVELOPMENT AREA
FISCAL YEAR BEGINNING 7/1/19**

This Agreement is made and entered into by and between the Counties of Calumet, Fond du Lac, Green Lake, Waupaca, Waushara and Winnebago in the State of Wisconsin (hereinafter "the Counties).

WITNESSETH:

WHEREAS, Sec. 66.0301(2) of the Wisconsin Statutes provides that "...any municipality may contract with other municipalities, for . . . the joint exercise of any power or duty required or authorized by law."

WHEREAS, Sec. 66.0301(2) of the Wisconsin Statutes titled "Intergovernmental Cooperation" authorizes counties to make the most efficient use of their power by cooperating with each other on the basis of mutual advantage and thereby provide job training and related services in the manner that will accord best with geographic, economic, population, and other factors influencing the needs and development of local communities;

WHEREAS, the Counties have a mutual interest in forming a single purpose Workforce Development Area (WDA), as defined in Public Law 113-128, of the Federal Workforce Innovation and Opportunity Act of 2014 (hereafter referred to as WIOA) to increase occupational skills, employment, job retention and earnings, and as a result, improve the quality, reduce welfare dependency and enhance the productivity and competitiveness of the workforce within the boundaries of the units of counties that are parties to this Agreement;

WHEREAS, the chief elected officials of the Counties participating in this Agreement have been previously authorized by their respective County Boards of Supervisors to create the Fox Valley Workforce Development Area under Sec. 66.0301(2), Wisconsin Statutes, and to participate as active partners, pursuant to Section 107(c)(1)(B), in the provisions of said Public Law 113-128;

WHEREAS, the County Board of Supervisors of each of the aforementioned counties has adopted a resolution authorizing the County Board Chairperson of County Executive to sign this "Agreement of the Fox Valley Wisconsin Counties Consortium under the Workforce Innovation and Opportunity Act (Public Law 113-128)" (hereinafter, the "Agreement");

NOW, THEREFORE, in consideration of the above premises and the mutual covenants of the parties hereinafter set forth, the Counties do hereby agree to the following Agreement:

AGREEMENT

That the Counties of Calumet, Fond du Lac, Green Lake, Waupaca, Waushara and Winnebago, under Sec. 66.0301(2) Wisconsin Statutes, do hereby constitute themselves to be a consortium for the purposes of Section 107 (c)(1)(B) of Public Law 113-128, the Workforce Innovation and Opportunity Act.

The Chief Elected Officials (the chairpersons of the County Board of Supervisors or County Executives) or the designees of said officials of the Counties in the above paragraph shall constitute the Workforce Development Area Consortium of Commissioners (hereinafter, the "Consortium") which shall appoint the Fox Valley Workforce Development Board (FVWDB) under Section 107(c)(1)(A) of the Act.

I. PURPOSE: The Purpose of this Agreement shall be to:

- A. Enable the Counties to organize a Workforce Development Area (WDA) as described in Sec. 106 of Public Law 113-128, the Workforce Innovation and Opportunity Act of 2014, which:
 - 1. is comprised of two or more units of local government
 - 2. will promote and coordinate effective delivery of job training services within the aforesaid Counties; and
 - 3. is consistent with labor market areas or areas in which related services are provided under other State and Federal Programs.

- B. Enable chief elected officials from the Counties entering into this Agreement to appoint members to a local Workforce Development Board (WDB) under Section 107(c)(1)(B)(i)(I) of the Workforce Innovation and Opportunity Act; and
 - 1. determine procedures for the development of a Local Plan, pursuant to Section 107(d) of the WIOA, and interface with the WDA by such methods or institutions as may be provided in such agreement;
 - 2. select a grant recipient, if other than the Chief Elected Official as stated in Section 107(d)(12)(B)(i) of the WIOA, and/or an entity to administer the Local Plan; and
 - 3. other functions and tasks as appropriate.

II. ADMINISTRATION & GOVERNANCE

The Counties participating in this Agreement select the County Executives of Fond du Lac and Winnebago Counties and the County Board Chairpersons/Vice-Chairpersons of Calumet, Green Lake, Waupaca and Waushara Counties to be their authorized representatives, also referred to as Chief Elected Officials (CEOs), to serve as a CEO Consortium. The Consortium shall approve the Local Plan (or modifications); jointly submit such a plan (or modifications) along with the local WDB to the Governor for approval; and carry out other responsibilities for the Counties in accordance with their agreement with the local WDB.

- A. Meetings. The CEO Consortium shall establish the time, place and date of its meetings.

1. Notices. All notices, requests, demands or other communications hereunder shall be in writing and shall be deemed to have been duly given, if delivered electronically, faxed, or mailed to the Counties at the following addresses, subject to the Wisconsin Open Meeting Law:

Board Chairperson
Calumet County Courthouse
206 Court Street
Chilton, WI 53014-1198

County Executive
Fond du Lac County Courthouse
City/County Government Center
160 S. Macy Street
Fond du Lac, WI 54935

Board Chairperson
Green Lake County Courthouse
571 County Road A
PO Box 3188
Green Lake, WI 54941-3188

Board Chairperson
Waupaca County Courthouse
811 Harding Street
Waupaca, WI 54981-0354

Board Chairperson
Waushara County Courthouse
Box 488
Wautoma, WI 54982

County Executive
Winnebago County Courthouse
P.O. Box 2808
Oshkosh, WI 54903-2808

B. Officers: Chairperson, Vice-Chairperson, Secretary

Each County Executive or Chairperson, or their designees, will serve as officers of the Consortium. Rotation of officers will be based upon alphabetical order of the names of the Counties for one year terms. The first Chairperson shall be from Calumet County, the Vice-chairperson from Fond du Lac County and the Secretary from Green Lake County. The order of succession from thereon shall be that the Vice-Chairperson shall be elevated to Chairperson, the Secretary shall be elevated to the Vice-Chairperson, and the Secretary shall be appointed from the county which is next in the alphabetical order. After serving as Vice-Chairperson, if a County is unable or unwilling to serve as the Chairperson of the CEOs, that County may request that the Consortium appoint the current Secretary as Chairperson. The Vice-Chairperson and/or Secretary shall then be appointed from the Counties which are next in the alphabetical order. The Chairperson may appoint a staff person of one of the consortium member counties or the administrative entity to serve as board clerk. Vacancies shall be filled by election for the remainder of the unexpired term.

Officers of the CEO Consortium and their responsibilities are as follows:

1. The Chairperson of the Consortium will preside over all meetings and shall be the Chief Elected Official (CEO) for purposes of the Workforce Innovation and Opportunity Act. This person shall have signatory authority and authority to speak for the consortium in all matters regarding the WIOA. The term of this designation shall be identified.
2. The Vice-Chairperson will preside over meetings in the absence of the Chairperson.
3. The Secretary will ensure proper notice of all meetings of the Consortium, the keeping of minutes for the Consortium meetings and circulate those minutes as directed by the

Consortium. In the absence of the Chairperson and Vice- Chairperson, the Secretary shall perform the duties of the Chairperson.

4. The Chairperson may appoint a staff person of one of the consortium member counties to serve as clerk, otherwise the FVWDB shall serve as clerk. In the absence of FVWDB staff, the secretary performs the duties of the clerk.
5. Roberts Rules of Order, Newly Revised, shall govern the procedures of the Consortium insofar as they do not conflict with applicable law or administrative rules or by-laws duly adopted by the Consortium.

III. TERM

This Agreement shall be reviewed annually and renewed unless the Counties choose to terminate pursuant to Section VII herein, or termination of Public Law 113-128, the Workforce Innovation and Opportunity Act of 2014.

IV. POWERS

The Counties participating in this Agreement shall have the power to:

- A. The Consortium shall appoint the Workforce Development Board (WDB) of the area, in accordance with the requirements of 29 U.S.C. 3122(b) and 3122(c)(1)(B) (WIOA Sections 107(b) and (c)(1)(B)) and applicable rules thereunder, and consistent with any procedures set forth in Attachment A that may be adopted by the Consortium. When a vacancy occurs on the Board in a position representing a particular county, the Chief Elected Official for that county shall be entitled to select the qualified replacement member and the CEO shall facilitate appointment of that member to the Board.
- B. Select an individual or individuals as their Authorized Representative (CEO) to approve the Local Plan (or modifications) and jointly submit such plans (or modifications) to the Governor for approval as set forth in Section II of this Agreement.)
- C. Perform other powers assigned to chief elected officials authorized Sec. 66.0301(2) of the Wisconsin Statutes, or Public Law 113-128, the Workforce Innovation and Opportunity Act of 2014, as each now exists or is hereafter amended.
- D. The Consortium shall execute an agreement with the Workforce Development Board for the operation and functions of the Board under Section 107 of the WIOA, and shall approve all Local Plans under Section 108 of the WIOA.

V. FISCAL MANAGEMENT

The Counties consenting to this Agreement, along with the local WDB, will select the WIOA Grant Recipient. The WIOA Grant Recipient is responsible for the job training and related services. The FVWDB shall keep itemized and detailed records covering all expenditures under the budget incorporated in the jointly approved and submitted Local Plan from the Authorized Representative and the WDB. The local FVWDB shall conform to all the fiscal requirements of all applicable laws.

VI. CONTRACTS AND CONTRACTUAL SERVICES

The WDA Grant Recipient and FVWDB may exclusively enter into contracts, concerning job training and related services authorized under WIOA, with the State or Federal governments, and may subcontract

with any municipal, profit or non-profit corporation, or individual to provide job training and related programs and services for residents identified in the Local Plan.

TERMINATION

- A. Any county entering into this Agreement may withdraw from the Workforce Development Area pursuant to the relevant provisions in State and Federal laws.
- B. The Counties forming the Fox Valley Workforce Development Area may terminate this Agreement in the event expected or actual funding from the State, Federal governments, or other source is withdrawn or substantially reduced in such a fashion as to make the continued operation of the WDA unfeasible. In such case, termination of this Agreement shall be effective upon written notice of termination with receipt acknowledged by all Counties and the Governor.
- C. The Governor will re-designate a local Workforce Development Area under Section 106 of WIOA and thereby terminate this Agreement if the WDB and Chief Elected Officials fail to reach agreement on the development of the Local Plan, the choice of the Administrative Entity or Grant Recipient.
- D. The Consortium may be dissolved and this agreement may be rescinded only with the consent of all the Boards of Supervisors of the counties party hereto and the Governor.
- E. Any county that withdraws from the Consortium shall remain liable for its proportionate share of liabilities related to the period prior to its withdrawal, as determined by the CEO Consortium.

VII. ACQUISITION AND DISPOSAL OF PROPERTY

The FVWDB shall acquire, hold, and dispose of real and personal property in the same manner as counties within the State of Wisconsin, as provided for in Sections 59.06, 66.28 and 75.35 of the Wisconsin Statutes, as well as consistent with WIOA regulations and guidelines.

VIII. APPLICABLE LAW

The Counties agree that this Agreement shall be construed pursuant to and in accordance with the laws of the State of Wisconsin.

IX. AMENDMENT

The Consortium may adopt operational and procedural By-Laws consistent with this Agreement, applicable federal and state laws, and rules or regulations pursuant thereto, By-Laws or amendments thereto may be adopted by the affirmative vote of 2/3 of the entire membership of the Consortium at any regular meeting called for that purpose, provided that written copies thereof are delivered to each member 15 days prior to consideration.

X. IMPACT OF LEGISLATIVE CHANGES

Any terms and conditions which may be rendered inapplicable by a change in State, Federal or local laws shall not affect the validity of those portions of this Agreement not impacted by the change in legislation. It is further understood by the Counties that certain terminology in this Agreement may change as Federal and State laws governing this Agreement dictate.

XI. LIABILITY

To the extent permitted by law, liability which arises pursuant to this Agreement shall be apportioned as follows:

- A. Workforce programs in the Fox Valley Workforce Development Area shall be administered prudently to minimize liability;
- B. Contracts for service delivery shall require indemnification by the contractor in the event that contractor errors or omissions result in disallowed costs or other liability;
- C. The FVWDB shall maintain adequate errors and omission insurance as described in the Joint Agreement, to cover CEOs and the FVWDB members;
- D. The Consortium is liable for any misuse of the grant funds allocated to the local area under sections 128 and 133 of the Workforce Innovation and Opportunity Act.
- E. In the case of any misuse of grant funds allocated to the local area, the Consortium agrees to assume liability as follows (Section 20 CFR 683.710) Liability will be determined by the CEO Consortium based upon the particular facts of the situation as to the responsibility of individual Consortium members for the particular funds.
- F. Finally, after every possible method to reduce liability is exhausted, any remaining liability, as determined by the CEO Consortium shall be apportioned between the six counties in proportion to their respective percentage of the workforce allocation in the year the disallowed cost or other liability occurred. For example, if \$10,000 in liability remained and a given county received an allocation of 10% of the workforce funding in the year the \$10,000 was expended, that county would be liable for \$1000.

This Agreement shall be effective when executed by the authorized official of each county of the Consortium thereof and shall thereupon act to repeal and supersede any and all prior written or oral consortium agreements.

FVWDB is an Equal Opportunity Employer and Service Provider

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IN WITNESS WHEREOF, the parties hereto have caused this Agreement to be executed by the Chairperson of the County Board of Supervisors or the County Executive of the aforementioned Counties.

CALUMET COUNTY

Alice Connors
Board Chair

Date

FOND DU LAC COUNTY

Allen Buechel
County Executive

Date

GREEN LAKE COUNTY

Harley Reabe
Board Chairman

Date

WAUPACA COUNTY

Joe McClone
Board Vice Chair

Date

WAUSHARA COUNTY

Donna Kalata
Board Chair

Date

WINNEBAGO COUNTY

Mark Harris
County Executive

Date

ATTACHMENT A
(Described in Section IV. A. of the Consortium Agreement)

**SELECTION OF THE
WORKFORCE DEVELOPMENT BOARD**

Appointment of the Workforce Development Board (WDB) shall be carried out as described in Section 107 of the Workforce Innovation and Opportunity Act of 2014.

A. Members of the WDB shall consist of representatives of:

1. A majority of the members of each local board shall be representatives of business in the local area, who-

- (i) are owners of businesses, chief executives or operating officers of businesses, or other business executives or employers with optimum policymaking or hiring authority;

- (ii) represent businesses, including small businesses, or organizations representing businesses described in this clause, that provide employment opportunities that, at a minimum, include high-quality, work-relevant training and development in in-demand industry sectors or occupations in the local area; **and**

- (ii) are appointed from among individuals nominated by local business organizations and business trade associations.

2. Not less than 20 percent of the members of each local board shall be representatives of the workforce within the local area, who-

- (i) **shall** include representatives of labor organizations (for a local area in which employees are represented by labor organizations), who have been nominated by local labor federations, or (for a local area in which no employees are represented by such organizations) other representatives of employees;

- (ii) **shall** include a representative, who shall be a member of a labor organization or a training director, from a joint labor-management apprenticeship program, or if no such joint program exists in the area, such a representative of an apprenticeship program in the area, if such a program exists;

- (iii) **may** include representatives of community-based organizations that have demonstrated experience and expertise in addressing the employment needs of individuals with barriers to employment, including organizations that serve veterans or that provide or support competitive integrated employment for individuals with disabilities; **and**

- (iv) **may** include representatives of organizations that have demonstrated experience and expertise in addressing the employment, training, or education needs of eligible youth, including representatives of organizations that serve out-of-school youth;

3. Each local board shall include representatives of entities administering education and training activities in the local area, who -

(i) **shall** include a representative of eligible providers administering adult education and literacy activities under Title II;

(ii) **shall** include a representative of institutions of higher education providing workforce investment activities (including community colleges);

(iii) **may** include representatives of local educational agencies, and of community-based organizations with demonstrated experience and expertise in addressing the education or training needs of individuals with barriers to employment;

4. Each local board shall include representatives of governmental and economic and community development entities serving the local area, who—

(i) **shall** include a representative of economic and community development entities;

(ii) **shall** include an appropriate representative from the State employment service office under the Wagner-Peyser Act serving the local area;

(iii) **shall** include an appropriate representative of the programs carried out under Title I of the Rehabilitation Act of 1973 serving the local area;

(iv) **may** include representatives of agencies or entities administering programs serving the local area relating to transportation, housing, and public assistance; and

(v) **may** include representatives of philanthropic organizations serving the local area

5. Each local board **may** include such other individuals or representatives of entities as the chief elected official in the local area may determine to be appropriate.

6. The State of Wisconsin has also directed that a representative from Unemployment Insurance be placed on each board.

B. All members will be appointed by the Counties based on the requirements of the law and other locally defined considerations with the exception of those positions appointed by DWD.

Category	Minimum Required	Requirement
Business	at least 51% of total board	Shall
Workforce Representatives	at least 20% of total board	Shall
Labor Organizations	1	Shall
Labor Training/Apprenticeship	1	Shall
<i>Community Based Organization</i>	N/A	<i>May</i>
<i>Youth Organization</i>	N/A	<i>May</i>
Adult Basic Ed & Literacy	1	Shall
Higher Education Organization	1	Shall
<i>Local Education Organization</i>	N/A	<i>May</i>
State Employment Service (W-P)	1	Shall
Vocational Rehab	1	Shall
Housing / Transportation Agency	1	Shall
<i>Philanthropic Organization</i>	N/A	<i>May</i>
State Unemployment Rep (DWD mandate)	1	Shall

- C. WDB members will reviewed annually by the Chief Elected Officials present for approval.
- D. The WDB will select its chairperson from the private sector business members.
- E. WDB members shall be appointed for fixed and staggered terms.
- F. Vacancies will be filled according to the established by-laws.
- G. The WDB must be comprised of at least 20% female members.
- H. One minority representative must be appointed to the WDB if there is at least 3% minority population in the WDA.

COUNTYLAW POLICY AND PROCEDURE

Matter/Module Types

Matter

A “matter” is simply the name the program gives to an individual file. All matters are consecutively numbered within each module. Assignments will have a file number that looks like “CR19-0000”. Litigation files will have a file number that looks like “19-0001”. Code Enforcement files will have a file number that looks like “E19-0002”. The first two digits before the dash indicate the year the file was created. The four digits after the dash in the numbering system does not start over each year, and will continue consecutively within each module as new files are created. For example if the last Assignment file in 2019 is “CR19-0678” the next file opened in 2020 would be “CR20-0679”. Contract files will have a file number that looks like “CO0007”. Contract file numbers do not reflect the year the contract was created, like the Assignment, Litigation and Code Enforcement file numbers do, but are consecutively numbered as files are created.

Assignment Module

What the module is used for

The Assignment Module is used for any legal work that the Corporation Counsel Office completes that does not involve litigation. It is possible that an Assignment file may eventually require opening a separate litigation file for the matter. Examples of Assignments include, but are not limited to, reviewing, drafting, and revising,

- Contracts and Agreements
- Notice of Claim/Injury
- Legal Opinions both formal and informal
- Ordinances
- Resolutions
- Employment matters
- Information files

- Memorandum of Understanding
- Open record requests
- Zoning enforcement – not including litigating violations
- Septic violation letters
- County Policy
- Collections

Assignment files will generally only be in electronic format, with very little retention of paper documents, if at all. There may be a possibility that there are paper and electronic files on the same subject due to the date the program went live, which was August 1, 2017. Files that were active as of that date were entered into the CountyLaw program and documents were scanned in; however, the paper file was retained. Retention of files electronically is allowed under County Ordinance. All retention schedules for files remain applicable and the electronic file may be purged from the system once the retention period in the County Ordinance has been met. For files created in 2015, 2016 and 2017, there is an Excel Spreadsheet in the CorpCounsel_Shared (S:) drive. It is called “File Tracking”.

Setting up an Assignment File

Setting up the Assignment file can be completed either by the legal assistant or corporation counsel. Assignment set-up is usually initiated by an email from the corporation counsel to the legal assistant after receiving a request for legal services from a Department Head or authorized individual from a County Department. Requests for assistance may also come by interoffice mail. Assignment files should be set-up for any legal question that requires more than a short, quick answer to the inquiry and involves legal research. Examples where an Assignment file would not be set-up would be advice on whether meeting minutes are correct, agenda review, etc.

Any initial documents that the office receives should be saved into the correct category in the matter. All initiating emails should be imported into the matter using the email importer button available in Outlook. When setting up a file, if a due date or target date is known, that should be entered into the calendar for the matter and a tickler created to remind staff that the matter needs attention.

When setting up assignment files, be sure to enter all the people who may need to be contacted while working on the file, or all employees or individuals that were included in the initiating email. Contacts can always be added as new developments emerge in a file. Having individuals entered as a contact makes it easier to email, since you can email directly from the contact tab in the module.

Working an Assignment File

Keeping Notes of File Activity

The Assignment module contains two areas where notes can be entered that describe the actions that have been undertaken with respect to the matter. They are both found under the “Basic” tab that looks like a file folder. There is a status and note tab that allow the user to enter information on what has been happening with the file.

The status tab should be used to note short day-to-day activities, like incoming and outgoing emails, research, where the file is in relation to committee or county board action, whether you are waiting on a response from an employee or vendor on a request. By entering information in the status tab, everyone in the office has the ability to quickly review what has happened with the file and what the current status of the file is. When making an entry in the status tab, there is a button to allow you to also record your time on what you just accomplished. It is highly recommended that if it took a minute or more, that you check the box, enter your time and what you were doing. This will help corporation counsel with providing information to the County Board and its auditors for reporting and time allocation reporting.

The note tab should be used for actions recording conversations, insights and thoughts on strategy, or items that need to be completed, etc. In other words, actions that require more detail than a simple status note.

Tracking Time

Tracking time is important to determine how much time the corporation counsel office spends working on Assignment Files for individual departments. Every effort should be made to track time spent on each file. Tracking time can be done when entering a status note or using the “time accounting” button, which looks like a stopwatch in each assignment file tab.

Litigation Module

What the module is used for

The Litigation Module is used for all cases that involve court action, whether small claims, large claims, and equity/injunctions, and includes Involuntary Mental

and Alcohol Commitments, Guardianships/Protective Placements, bankruptcy, foreclosure etc.

Litigation files will be kept in both paper and electronic format until such time as the Office is ready to go completely paperless. However, due to various statutory requirements for keeping original documents that are electronically filed, it is unlikely that litigation files will become completely electronic.

Setting up a Litigation File

Setting up the Litigation file can be completed either by the legal assistant or corporation counsel. The corporation counsel will usually set up litigation files based upon emails or conversations with department heads or receiving a summons and complaint from the County Clerk. The legal assistant will usually set up involuntary mental health commitment and guardianship/protective placement cases as the legal assistant preps the files for e-filing for the corporation counsel.

Any initial documents that the office receives should be saved into the correct category in the matter. All initiating emails should be imported into the matter using the email importer button available in Outlook. When setting up a file, if a due date or target date is known, that should be entered into the calendar for the matter and a tickler created to remind staff that the matter needs attention.

When setting up litigation files, be sure to enter all the people who may need to be contacted while working on the file, or all employees or individuals that were included in the initiating email. Contacts can always be added as new developments emerge in a file. Having individuals entered as a contact makes it easier to email, since you can email directly from the contact tab in the module. It is also important to add all parties and witnesses in the case as well. Certain template documents pull information for parties and witnesses and fill in the names and addresses (if in the template) into the document. By having information entered into the system, it should save time drafting documents that are saved as templates within the system.

Working a Litigation File

Unlike the Assignment module, the Litigation module does not contain a “status” tab. The main place to record activity in the file is in the Note tab on the basic matter section of the file. You can record activity in the timekeeping button, however.

Because litigation files can be more complex and have more items to track, it contains data entry points that aren't found in the Assignment Module. Some of these include:

- On the Basic tab
 - Incident – enter the date that the cause of action accrued (when the violation happened, or ED happened, etc.)
 - Filed Date – be sure to enter the date the case was filed with the Court. This is the date that it comes back file stamped as filed with the e-file system
 - Served Date – this is the date the defendant or the county was served
 - Assigned Date – this is the date the matter was assigned to an attorney. It can be left blank unless it was assigned to outside counsel
 - Review – is the person assigned to review the matter next.
 - Review Date – is the date that the case should next be looked at. Filling this in will create a reminder in the calendar/tasks for the person who is chosen to review the matter
 - Court – choose the court
 - # - enter the case number
 - Judge – enter the judge handling the case
- On the Parties Tab
 - Date served – to enter the date a party to the action was served, you have to click on the “modify” button and enter the date of service. This is important where the county is the plaintiff.
 - Related Parties – is where you enter any attorneys, GAL, or Guardian information for that party. Each party should have attorney information entered, and any other pertinent information so that corporation counsel can quickly determine who is working with that particular party in the litigation.

Contract Management Module

Contract Management is a module that can be used to track contracts including approvals, certificates of insurance, renewal and expiration dates. Currently, the Office is not actively using this module and expects to utilize it in the future after determining whether the Office should be in charge of monitoring contracts.

Code Enforcement Module

Code Enforcement can be used for ordinance violations rather than using the Litigation module. Currently, the Office is not using this module due to software issues.

Documents/Templates in All Modules

Attachments tab

The Attachment tab (paperclip icon) is found in all modules. Depending on how you categorize the document, it will be stored in a folder for that category of document category. A document category listing report is included with this Policy in the appendix. New document categories can be created for use in each module if necessary, but care should be taken that document categories make sense and do not repeat other categories. General categories are preferred over specific ones.

In addition to categorizing the document, there are also document types that are chosen to further assist with identifying a document. A Document Type Listing report is included with this Policy. Document types are helpful for determining drafts, final copies, if the document is a court filed document, etc. and will assist staff with determining which document needs to be accessed based on the document type needed.

Each document category can contain subfolders. It is recommended to create subfolders for document categories where further subdivision would make it easier for a user to find a document. For example, you can create a subfolder for individuals that have been contacted by email and then those emails can be placed in that person's subfolder. Or, in a litigation case, a pleading folder can have subfolders for plaintiff and each defendant.

Document Templates

Templates are available and can be created for use in each module. Using templates helps speed up drafting documents by using the data already contained in the matter. Templates are accessed by clicking on "new" in the documents tab. A menu will pop-up giving you a choice of assignment, litigation or you can choose "blank document" to get a blank word document that will automatically save to the matter you are working in.

The Assignment module does not have many templates, but currently includes a memorandum, fax coversheet, letterhead (color or b/w) and ordinance and resolution templates.

The Litigation module has the most templates and most are kept in subfolders depending on the type of case you are working with. There are also many templates for frequent civil litigation documents such as affidavits, affidavits of mailing, bill of costs, case caption, fax cover sheets, letterhead, and other motions. Use the templates and the program will fill in as much information as it can based on how the template is set up. Unfortunately state mandated forms cannot be turned into templates at this time.

Email in All Modules

The email tab is found in all modules. Each module allows the user to email a contact or document directly from the matter you are working in. Staff should always try to email from the matter because the email is automatically saved in the matter.

It is important that all emails received for any matter are imported into the CountyLaw file associated with that matter. The program has an import feature that is added to Outlook to allow for easy import of emails. If the email is sent from CountyLaw it is automatically saved, however responses are not automatically saved. Therefore, the person receiving an email for a particular matter is the person who should be importing it into the file. Duplicate emails will generate a duplicate message and duplicates do not need to be saved in the matter.

Once an email is saved in the matter, if you double click on it, it will be accessible and you can reply to the email. If you follow this step, rather than reply in Outlook, the email will be saved in the matter just as if you initiated the email from Countylaw. This is preferable since it saves the time and hassle of having to import an email into the matter, and can maintain the email string (if desired).

E-filing/importing documents

The legal assistant is responsible for importing e-filed documents into each litigation matter, unless the legal assistant does not have access to the email. In that situation, the corporation counsel would be responsible for importing the document. The Wisconsin Circuit Court e-filing system will email the corporation counsel with the efiled document, and if the legal assistant has permission to view

the case file in CCAP, will also receive an identical email. The document and the email should both be saved into the file. The category should be a “court filed” document so that we know whether we have received a filed copy or need to check with the clerk of court/register in probate for our documents.

Tickling/setting calendar reminders

Every effort should be made to set up reminders to work on either an assignment or litigation file using the calendar feature in CountyLaw to ensure that our department stays on top of the legal requests and work of the office.

1. Target Date – is entered on the Basic screen in the Assignment module and is used to remind staff when a department needs the file completed by. It will show up in the calendar in the matter and on the “dashboard” calendar as well. Target date is not available in the litigation module
2. Tickler – is entered on the calendar screen for both matters. It should be used to set a reminder for reaching out to a vendor, county staff or whomever we need to communicate with or follow-up with. Ticklers should be set generally for two week intervals to ensure that we stay on top of the file.
3. Due – is used in both matters in the calendar screen. This is a reminder to let the office know when certain documents, actions or replies are due on a file.
4. Appointment – is used in both matters on the calendar screen. Use this to set appointments, court hearings, status conferences, etc. All scheduled items in appointments should also be manually entered onto the corporation counsel’s or legal assistant’s (or both) Outlook calendars as we do not use the calendar interface in the program for security reasons.

Training/CountyLaw Guides

CountyLaw (Cycom) provides training guides on its website. Attached to this policy are the following training guides to assist staff with questions that may arise on how to use the program.

1. Adding Calendar reviews to litigation cases
2. Adding CityLaw macros to Existing document
3. Add New outside counsel
4. Creating, editing and deleting contacts
5. Created a new litigation matter
6. Assignment matter screens
7. Create a new assignment matter

8. Navigation and data entry tips
9. Party management
10. Cross-referencing a matter
11. Find a matter
12. Dashboards - Skyline and Main Street

Flexibility

The CountyLaw program is designed to be flexible to meet the needs of the Corporation Counsel Office. This Policy and Procedure document is also intended to be flexible and will be updated as necessary to reflect the practices of the office as we learn the program and become more familiar with it.

From: [Cycom Support](#)
 To: [Sally Ann](#)
 Subject: RE: Suggested Improvement
 Date: Tuesday, July 31, 2018 4:12:49 PM
 Attachments: [image001.png](#)
[image004.png](#)
[image007.png](#)
[image005.png](#)
[image003.png](#)

Dawn,

You already can do what you want with our product.

First, set up a review date and assign it to someone. Here is an example from Litigation.

Litigation Cycom080816
Cycom Test Matter_LI_Rev

Basic	Description	Evaluation	Notes	Equipment	Keywords	File Management
Title: Cycom Test Matter_LI_Rev						
File #	Cycom080816	Type	DEF	Cause	5006	
Attorney		Car	DAN	RMAT	A,B,C,D	
Status	Open	Disposition	Dismissal - Court	Cross Ref	Multiple Matters	
Team		Court	LASC	#	12345-817	
Staff	CYC	Judge		Magistrate		
OS Counsel		CityDept	00	Fund		Non-City Department
Inv		Short Desc	Cycom Test Matter_LI			

Trial 5/2/2018

Open: 8/8/2016

Incident: 9/19/2016

Filed: 9/20/2016

Served Dt:

Assigned:

Review: **CYC**

Review Date: **9/7/2018**

This will create a due event in the calendar.

Litigation Calendar Cycom080816 - Cycom Test Matter_LI_Rev

Reminder	Type	Date	Time	Subject	Location	Attendees	Annotation	Key Date	Master Calendar Report
>	Due	11/2/2018		Reminder: F/D to Destroy Deposition Trans		CYC	test of new event		
	Due	9/7/2018		Cycom080816 - Cycom Test Matter_LI_Rev		CYC			
	Due	6/2/2018		F/D to Request Modification of Any Final Su		CYC	test of new event		

You can edit the event and check the box for the Master Calendar Event Report.

Event - 60 Day Review Required

Show As: Time Marker | Class: | Due: | Entered By: CYC | Calendar Type: REVIEW

Module: Litigation | File #: Cycom080816 | Title: Cycom Test Matter_LI_Rev

Start Time: 9/7/2018 | End Time: 9/7/2018 | All Day Event | Show in File Index | Key Date | Master Calendar Report

Subject: 60 Day Review Required | Attendees: CYC-Cycom Data Systems Administrator

Disposition: | Remarks: | Disposition Date: |

In Litigation under Reports, the Master Calendar Event Report will give you all events in a date range where the box was checked. The report looks like this:

Master Calendar
Los Angeles City Attorney's Office
 From : 09/01/2018 To 09/29/2018

Date	Time	Attorney	Case Title	Case#	Judge	City Dept	Event Title	Location
09/6/18	8:30 AM	Anas, Carl	Fernandez, Amanda v. City	BC 632218	MARC GROSS	Public Works / Bureau of Street Services	Trial	Dept. 3
09/6/18	8:30 AM	Bairamian, Lara	Tedesco, Daniel v. Dollar Tree, Inc.	BC 660499	DALILA CORREAL	Department of Transportation	FSC	Dept 40 - 111 North Hill St - Stanley Motel Courthouse Room 3A Dept SSC7
09/6/18	9:00 AM	Wright, John A.	Balderez, Alfonso v. City	BC 684425	MARC GROSS	Urban Forestry Division	Depositions of Plaintiffs	Dept. 93
09/6/18	10:00 AM	Wright, John A.	Alarcon, Victor v. City	BC 575283	YOLANDA OROZCO	Public Works / Bureau of Street Services	FSC	Dept. 97
09/6/18	10:00 AM	Levin, Honey A.	Jeanette, Kelly Marie v. City	BC 655077		Department of Transportation (A.L.)	FSC	Dept. 97
09/6/18	10:00 AM	Anas, Carl	Wallace, Maryann E. v. City	BC 642489	YOLANDA OROZCO	Public Works / Bureau of Street Services	FSC	Dept. SSC7
09/6/18	10:00 AM	Gillispie, Evelyn	Konrad, Michael F. v. City	BC 662092	DENNIS J LANDA	Department of Transportation	FSC	Dept. 93
09/6/18	10:00 AM	Valdez, Valerie	Cortez, Esteban Toscano v. J. Arltz	BC 629203	PATRICIA NIETO	Bureau of Street Services (A.L.)	FSC	SSC 2
09/6/18	10:00 AM	Loomis, Richard	Arroyo, Esperanza v. City	BC 640832	YOLANDA OROZCO	Public Works / Bureau of Street Services	FSC	Dept. 7
09/6/18	10:00 AM	Com, Leticia	Mendoza, Yvonne v. City	BC 634237	MARC GROSS	Public Works / Bureau of Street Services	FSC	Dept. SSC3
09/7/18		Kaplan, Michael	Firth, Robert v. City	BC 661904		Public Works / Bureau of Street Services	Firth v. City (BC661904) - Final Status Conference	Dept. 71 - Stanley Motel Courthouse
09/7/18			Cycom Test Matter_LI_Rev	12345-817		Non-City Department	60 Day Review Required	
09/7/18	8:30 AM	Brechee, Richards	Dufourg, Simone v. City	BC 655513	BENNY OSORIO	Non-City Department	Trial	Dept. 97

Printed: 07/31/2018 02:00 PM | CONFIDENTIAL - ATTORNEY CLIENT PRIVILEGED INFORMATION - CITY ATTORNEY WORK PRODUCT

You can edit the event so that it appears more meaningful in the report such as "60 Day Review Needed" or whatever is appropriate.

You can add an alarm to the event by highlighting it and right clicking with mouse and choosing Alarm. Then, create a new alarm that will alert you based on the criteria you set.

A case does not have to be open to have a due item as long as it has not been disposed as completed.

You can also create another status code of R that is open but are cases pending review. Then when you run filters or reports by the O for open, the R for review ones will not show up. You do that in Tools/System Management and then under whatever module is appropriate and in the Status Codes options.

I hope this information is helpful.

Thank you,

Roger Smith
 Cycom Data Systems, Inc.
 Senior Support Specialist
 888-292-6688
 support@cycominc.com

From: Klockow, Dawn <dlockow@co.green-lake.wi.us>
Sent: Tuesday, July 31, 2018 9:05 AM
To: Cycom Support <support@cycominc.com>
Cc: Smit, Angie <asmitt@co.green-lake.wi.us>
Subject: Suggested improvement

Greetings and good day to you all!

I have a suggestion for a possible update/improvement. Would it be possible to have a field that we could run a report off of or a calendar notification for reviewing a case after it has been closed? One example for us is when we deal with involuntary mental health commitments. If we have a settlement agreement they last 90-days and then we do a dismissal. If we have an initial commitment it is usually for 6 months but we have to review the case 21 days prior to the expiration of the original commitment to see if an extension is needed. After an extension we have to review, again, 21 days prior to the expiration to see if we need to extend again. I find it annoying to have 10 or more technically closed cases on my open cases view that have to remain open because we can't tickle them out for review once they are closed. I hope this makes sense.

Thanks for taking my suggestion into consideration.

Have a great day!

Regards,

Dawn N. Klockow

Dawn N. Klockow
 Green Lake County
 Corporation Counsel

571 County Road A
 Green Lake, WI 54941-3188
 920-294-4067
 920-294-4069 fax

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CLIENTS SHOULD NOT FORWARD THIS EMAIL TO OTHERS. DOING SO RISKS LOSS OF ATTORNEY-CLIENT PRIVILEGE FOR THESE COMMUNICATIONS.



CITYLAW\COUNTYLAW

ADDING MACROS TO A FORM DOCUMENT

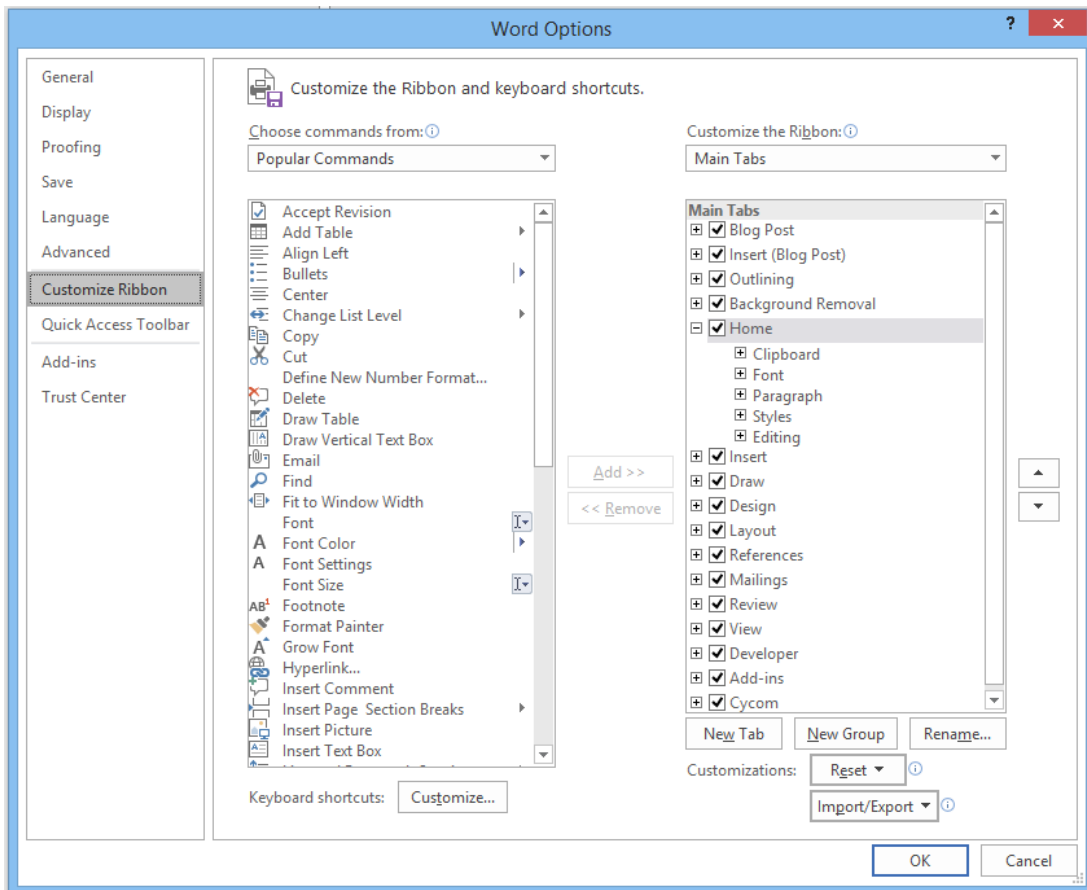
Steps to create an automated template from an existing form document:

1. If you have a form document you would like to automate to bring in data from CityLaw\CountyLaw, open the document.
2. Save the document as a template in the template directory. This will be the file people see when they use the template. To do this Click File, Save As on the Word toolbar and save the file as a Document Template (*.dot or *.dotm). Enter the new file name and browse to the template or work directory where you wish to save it. Click Save.

Note: A *.dot file is for a word templates using tools from Word 97-2003. It is recommended that these files be converted to *.dotm formats which are compatible with the prior editions of word and contain the newer features that are available.

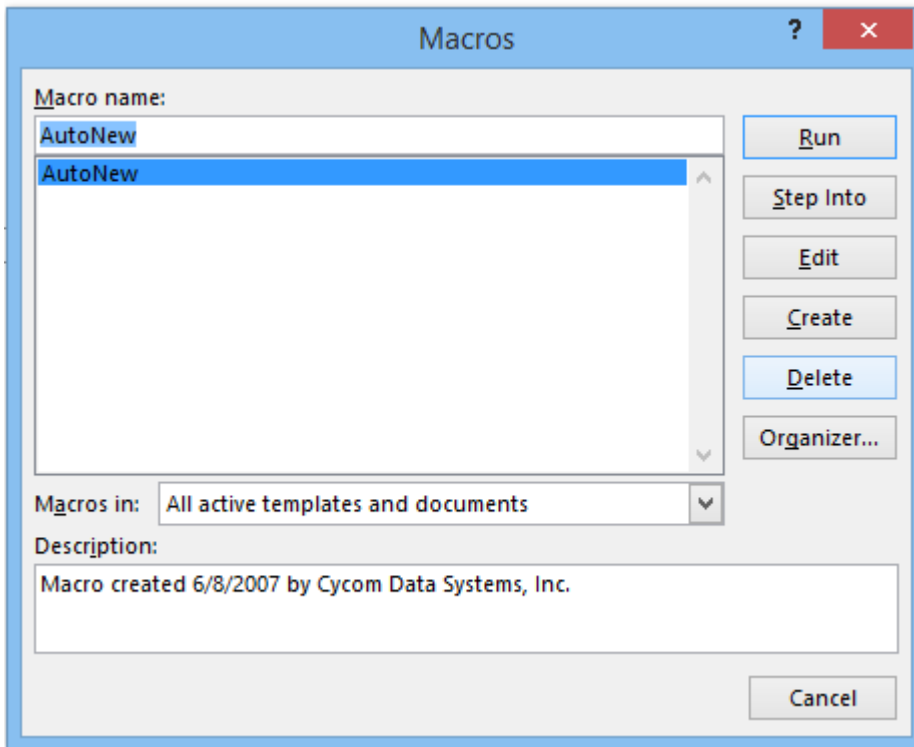
Warning: When you change the file extension to *.dotm, Word will automatically change the file saved as location to local templates. It is recommended that you first change the file format (*.dotm) and then the file save as location.

3. Enable the Developer Tab if this is not already done.
 - a. Go to the File\Options\Customized Ribbon.
 - b. On the right-hand side, check the Developer box and press the OK button at the bottom.

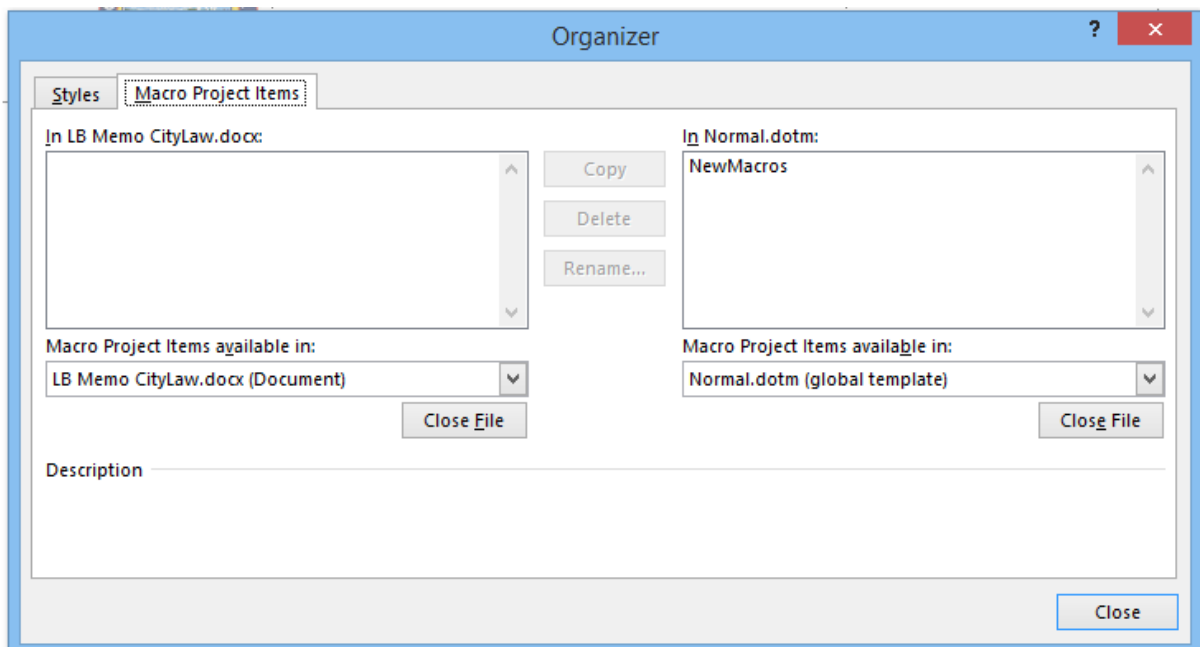


4. Import the automation macros into the document

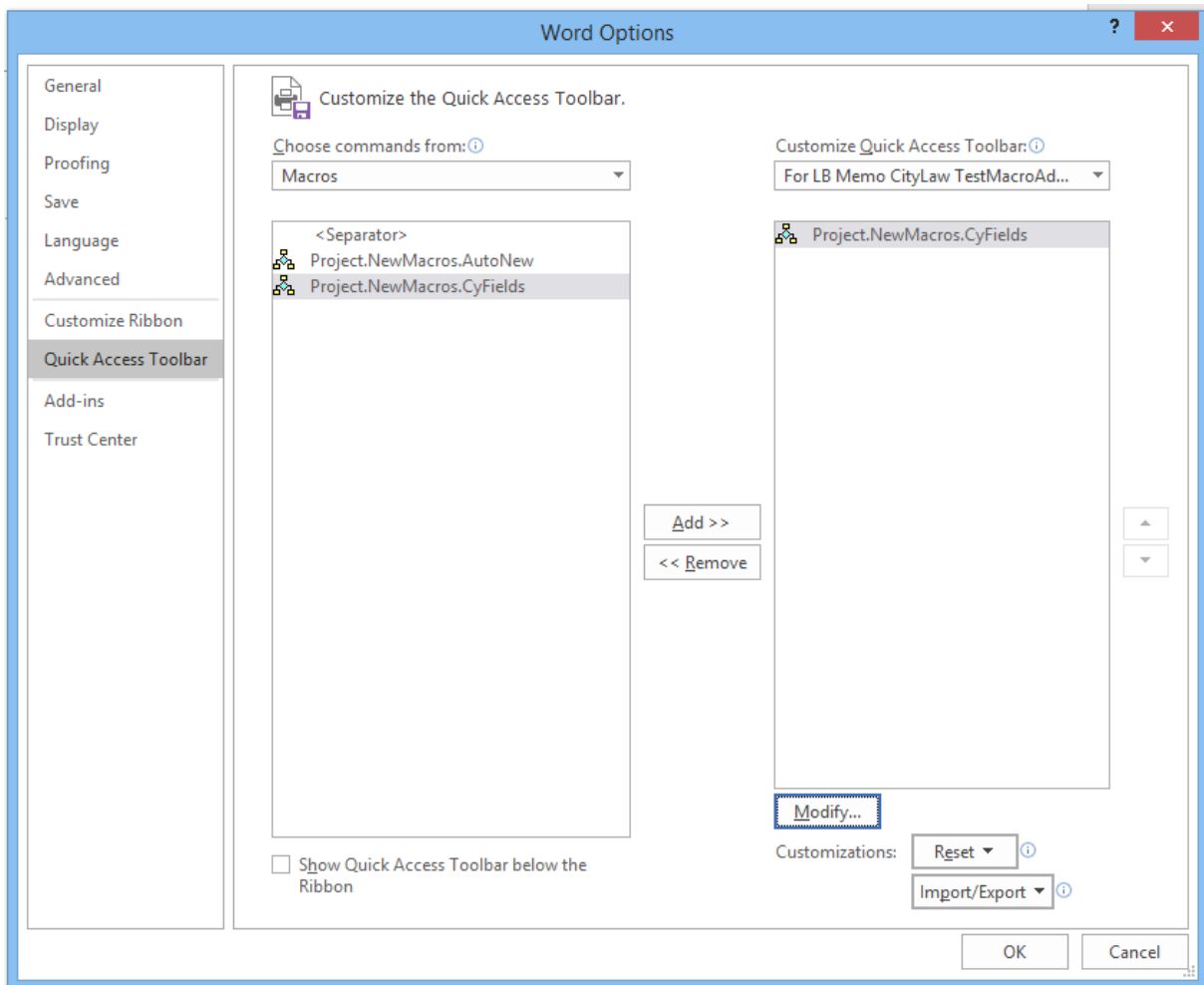
- a) Go to the Developer tab and select Macros. In the menu options that opens, click Organizer.



- b) You should see your form document on the left and Normal.dotm on the right. Click Close File on the right. The Close File button will change to Open File. Click Open File on the right and browse to the appropriate Create Template.dotm or dot file. Select it.

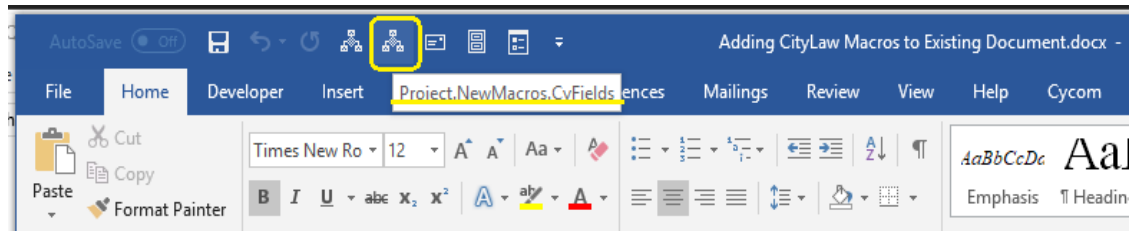


- c) Copy all of the macros from Create a Template.dot to your form document. To do this select each item in the list at the right. One quick way to do this is to highlight the item on the top of the list and then hold the shift key and highlight the last item on the list. This will highlight all the items at once. Press the Copy button in the middle to add them to the list on the left. When all items have been copied, click the Close button at the lower right.
5. Add the Insert Fields button to the toolbar.
 - a) Right click on the toolbar and click Customize Quick Access Toolbar.
 - b) **IMPORTANT:** In the “Save in” field change the selection to the name of the template you are working on. Failure to change this will cause the button to appear in all documents.

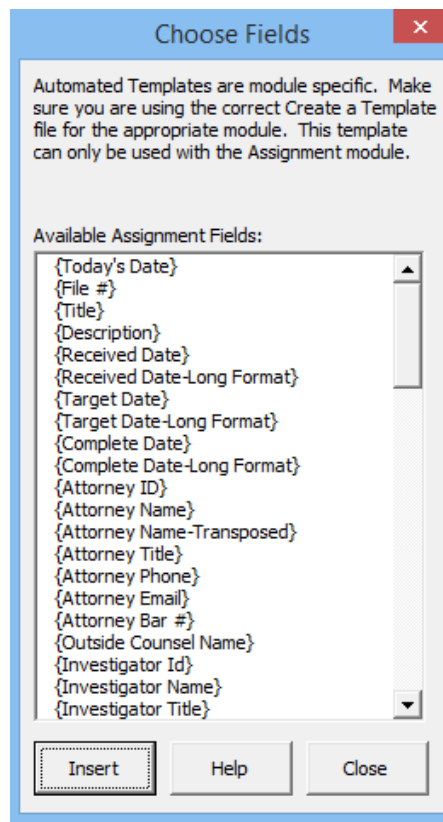


- c) On the Choose commands from tab on the left select Macros in the dropdown. A list of available macros should appear below.
- d) Click on Project.NewMacros.CyFields and press the add button in the middle.
- e) You can click Modify Selection and change the Name to Insert Fields.
- f) Click OK.

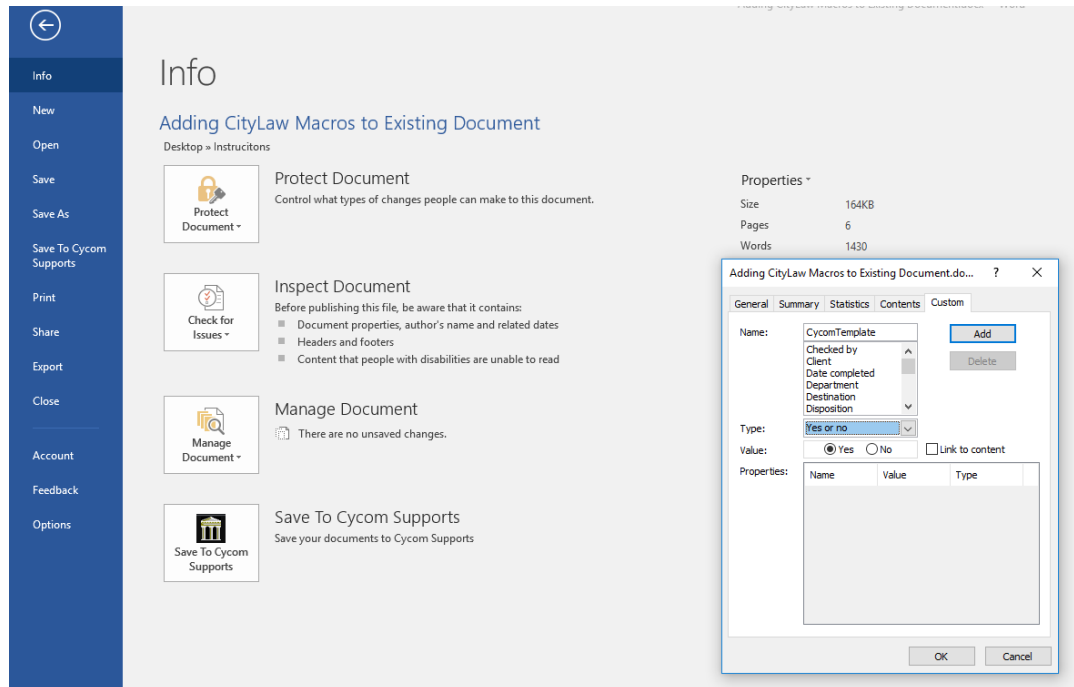
6. Use the Insert Fields button  to insert field labels into the template.



Move the cursor to the place where data should be imported from CityLaw\CountyLaw, click the Insert Fields button on the Word toolbar. Highlight the name of the field and click Insert. Click Close to return to the template.



7. Save and close the newly created template.
8. To work with the Web version, all templates must have an advanced property setting made. You make this setting by going to the File\Properties\Advanced\Custom Properties.



9. Enter in the following:
 Name: CycomTemplate
 Type: Yes or No
 Value: Yes

Press the Add button and then the OK button. The property will now be added to this template. This will need to be done for each template created.

Notes for Word 2007 and Word 2010

The following instructions allow for differences in Word 2007 and Word 2010:

To enable macros in Word 2007: click the Windows Office button, select Word options, go to Trust Center, click Trust Center Settings. Modify the macro settings. Select Trusted Locations. Select “Add new location”. Browse to the template folder, check the box to also trust subfolders of this location, and click OK.

To enable macros in Word 2010: click the File tab, select Options, go to Trust Center, click Trust Center Settings. Modify the macro settings. Select Trusted Locations. Select “Add new location”. Browse to the template folder, check the box to also trust subfolders of this location, and click OK.

NOTE – In some network environments you may also need to check the box for “Allow Trusted Locations on my network (not recommended)” option located on the Trust Center/Trust Center Settings/Trusted Locations screen. The need to use this option is indicated by an error message when trying to save a new folder location under the “Add new location” button.

To Import the automation macros into your document in Word 2007 or Word 2010: Click the View tab (Located at the end of the row of tabs starting with “Home”.) Select to View Macros (located at the upper far right). Click Organizer. You should see your form document on the left and Normal.dotm on the right. Click Close File on the right. Click Open File on the right and browse to the appropriate Create a Template.dot file. Select it.

Copy all of the macros from Create a Template.dot to your form document. To do this select each item in the list at the right and click Copy to add them to the list on the left. When all items have been copied, click the Close button at the lower right.

To add a button to the Quick Access toolbar in Word 2007 or Word 2010: open Create a Template.dot. If the Insert Fields button does not appear on the Quick Access toolbar, click the Office button, select Word options, select Customize.

In Word 2010, if the Insert Fields button does not appear on the Quick Access toolbar, click the File tab, select Options, select Customize Ribbon.

Choose Macros from the Drop-down list of commands. A list of available macros should appear on the left. Select Project.Newmacros.cyfields. Click Add. Click Modify. Use the defaulted button symbol but Change Display Name to “Insert CityLaw\CountyLaw Fields”. Click Ok to save name change. Click Ok to save the button to the toolbar. The button will be located in the Quick Access toolbar. The Quick Access toolbar is generally located in the upper left just to the right of the Windows Office button. **NOTE: The Project.Newmacros.cyfields will not be in the selection list of available macros until you have imported the automation macros into your document in Word 2007 or Word 2010 as instructed above.**

Compatibility Mode: Templates and documents that are created in Word 2007 or Word 2010 must be saved in compatibility mode (Word 97 – 2003 choice under *Save As* option) if they are to be used by older versions of Word.

The standard Microsoft Word 2007 and Word 2010 template extension is “dotm”. A “dotx” template extension would indicate that the version of Microsoft Word 2007 used to create the template was a Beta version. Do not use dotx.

Basic Steps to Create an Automated Template:

A Cycom representative can copy a file to your network that can be used to create templates for the Litigation module. Another file is available if you need templates for the Assignment module.

1. **Open Word. Open the Create Template.dot** for the respective module directly from the Word File menu. You should see a button to the right of the Standard Word toolbar called “Insert CityLaw\CountyLaw Fields”. The Standard Toolbar typically includes buttons for New, Open and Save. Insert Fields should appear at the far right. If the Insert Fields button does not appear on the toolbar please call me.
2. **Save the Create Template file with another name** in the template directory or a temporary work directory. This will be the file name people see when they use the template. To do this Click File, Save As on the Word toolbar and save the file as a Document Template (*.dot). Enter the new file name and browse to the template or work directory where you wish to save it. Click Save.
3. **Type the standard text of the form into the document** or copy and paste it from your existing form document. For example, the header and body for a letter or the court information for a pleading.
4. **When you come to a place where data should be imported from CityLaw\CountyLaw, use the Insert CityLaw\CountyLaw Fields button** on the

Word toolbar. Highlight the name of the field and click Insert. Click Close to return to the template.

5. **Save and close** the newly created template.

The template has a macro in it that will run when a document is created in CityLaw\CountyLaw. Please call if you have any questions.



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Articles in this section 

Add New Outside Counsel



Julie Stoltz

7 days ago · Updated

Follow

Need a reminder? Use the [Quick Reference Guide](#).

Need more details? Check out the [Standard Guide](#).

Quick Reference Guide

There are 10 steps to complete this task:

1. [Open the System Management module.](#)
2. [Select Outside Counsel.](#)
3. [Press New in the Outside Counsel Maintenance window.](#)

4. **[Fill in the mandatory fields.](#)**
5. **[Press Modules... in the Maintain Outside Counsel Records window.](#)**
6. **[Check the Modules to include.](#)**
7. **[Press Save in the Modules window.](#)**
8. **[Press Save in the Maintain Outside Counsel Records window.](#)**
9. **[Press Close in the Outside Counsel Maintenance window.](#)**
10. **[Press Close in the System Management window.](#)**

Once these steps are complete, the new **Outside Counsel** record should appear as expected. Users may have to exit and restart **CityLaw/CountyLaw** to see the changes.

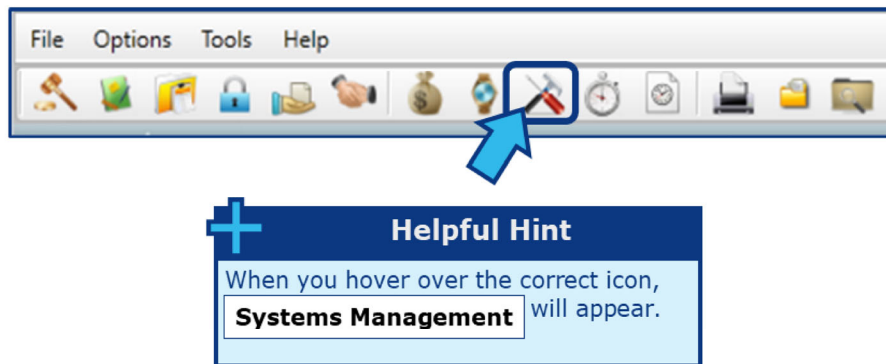
Standard Guide

Step 1. Open the System Management module.

There are 2 ways to open this module.

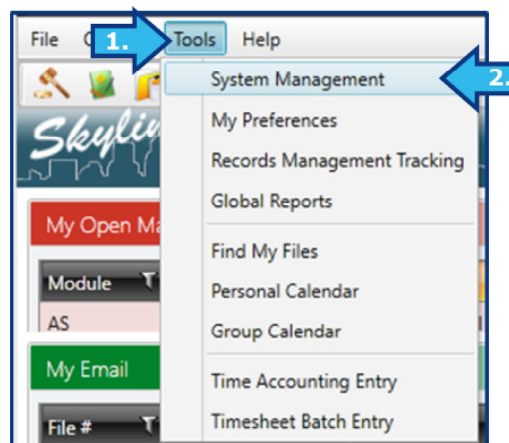
1-Step Option:

Press the **System Management** icon on the **Global Toolbar**.



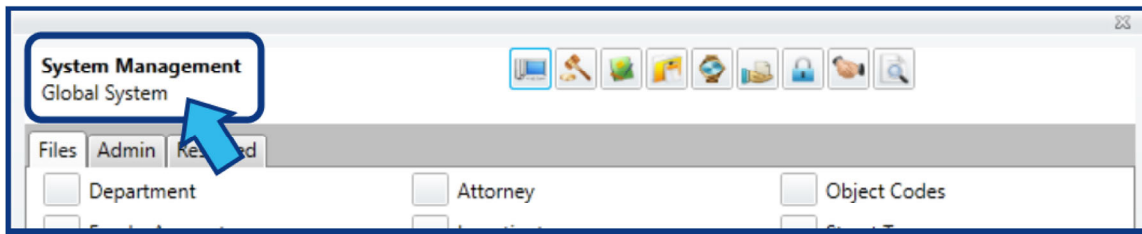
2-Step Option:

1. On the **Menu Bar**, press **Tools**.
2. Press **System Management**.

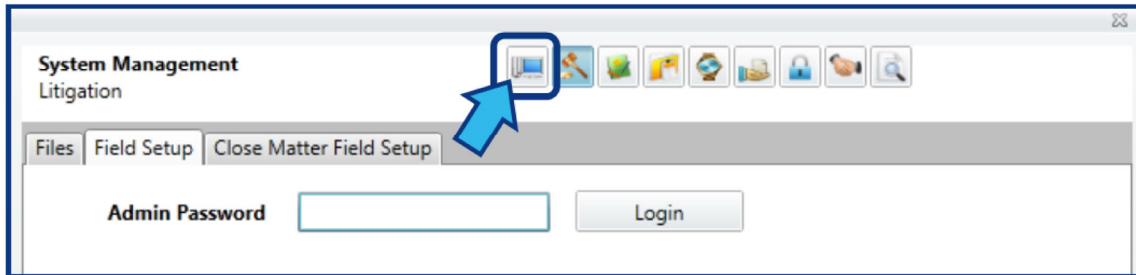


Step 2. Select Outside Counsel.

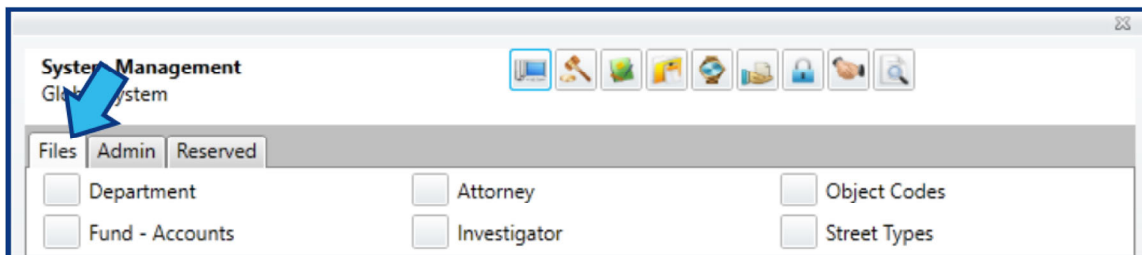
On first opening **System Management**, **Global System** should be the default module selected and should be listed under the **System Management** heading.



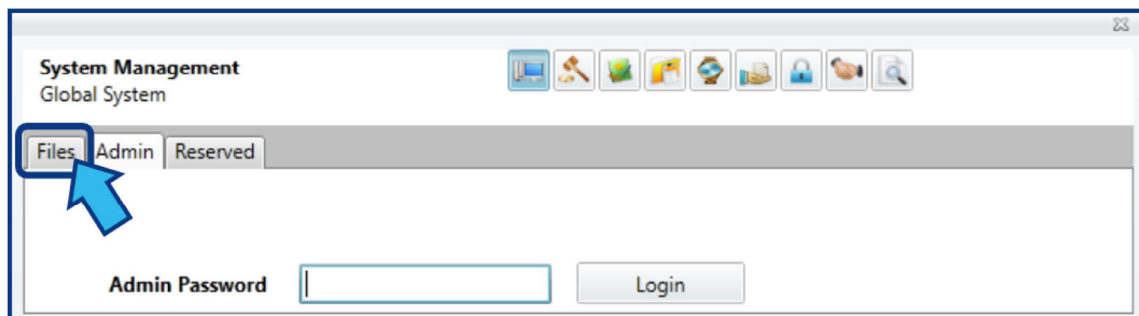
If not, press the **Global System** icon.



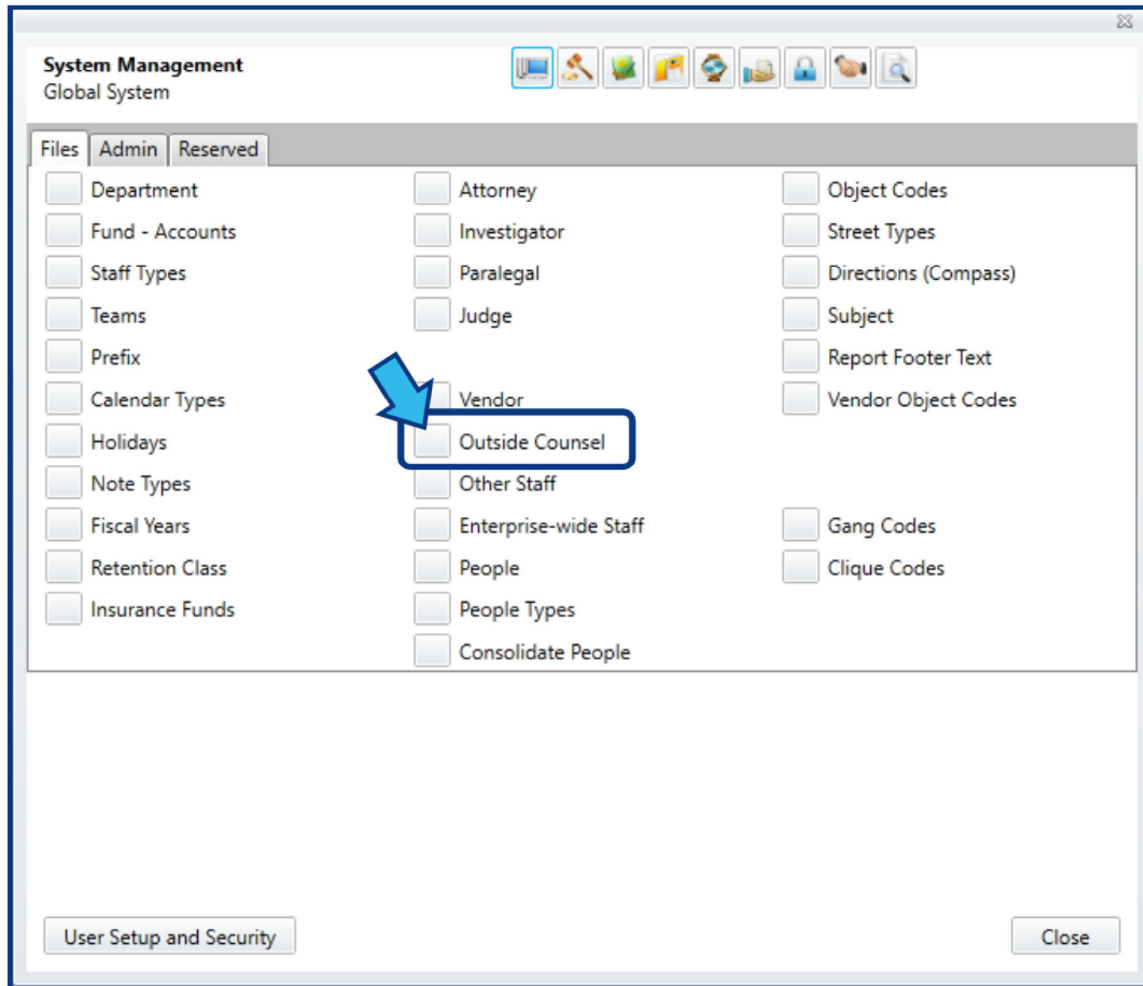
The **Files Tab** should be selected by default.



If not, select the **Files Tab**.



Press the selection box beside **Outside Counsel**, which is located near the middle of the window.



Step 3. In the Outside Counsel Maintenance window, press **New**.

After completing Step 2, an **Outside Counsel Maintenance** window appears. Press **New** in the bottom-left corner of the window.

Outside Counsel Maintenance

Show Inactive Only

ID Name Search

Drag a column header and drop it here to group by that column

ID	Name
> MM	Morgan & Morgan
PM	Perry Mason

New Edit Inactive Delete Print ^ v Close

Step 4. Fill in the mandatory fields.

In order to save a new **Outside Counsel** record, a **Code ID** and **Name** must be entered.

Maintain Outside Counsel Records

Outside Counsel records are maintained here. Modules...

Code ID BB Type OC Show all staff types Force login password

Net User

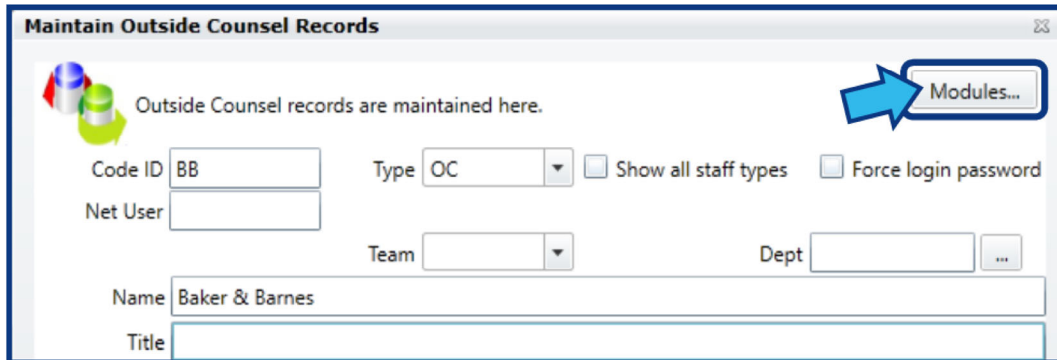
Team Dept

Name Baker & Barnes

Title

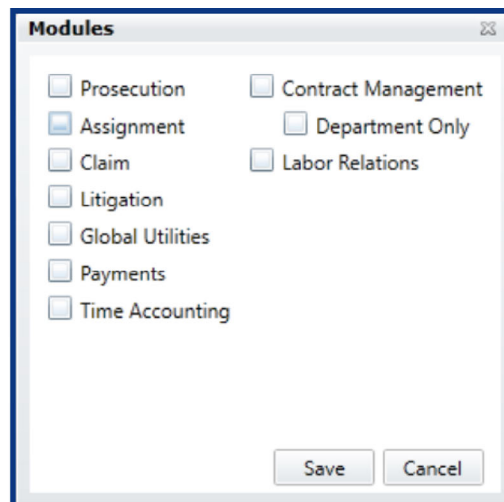
Step 5. In the Maintain Outside Counsel Records window, press Modules...

The **Modules...** button is located in the top-right corner of the **Maintain Outside Counsel Records** window.



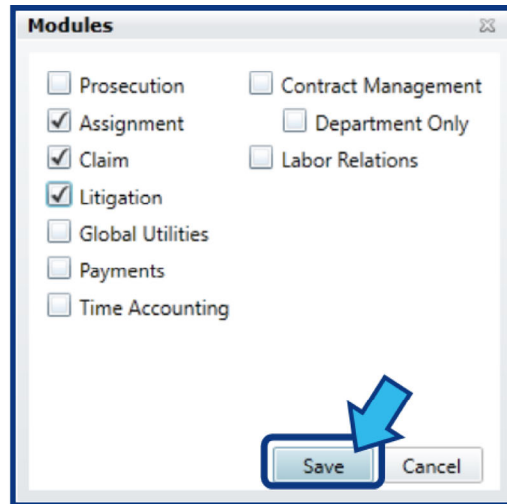
Step 6. In the Modules window, check the Modules to include.

Put a check beside each module that should have access to this **Outside Counsel** record. By default, none of the modules are selected. If none are selected, this **Outside Counsel** record will not appear in any module.



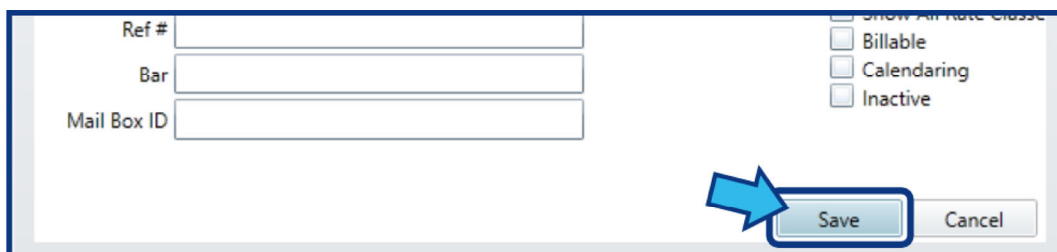
Step 7. In the Modules window, press Save.

After checking the appropriate modules, press the **Save** button located in the bottom-right of the **Modules** window.



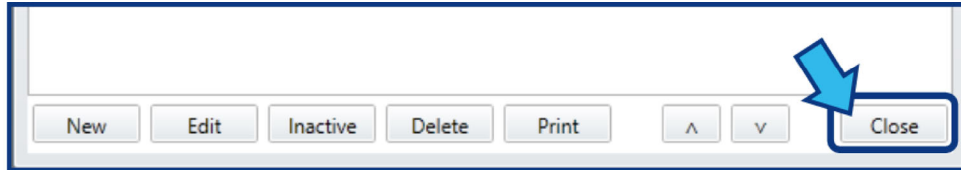
Step 8. In the Maintain Outside Counsel Records window, press Save.

Press the **Save** button located in the bottom-right corner of the **Maintain Outside Counsel Records** window.



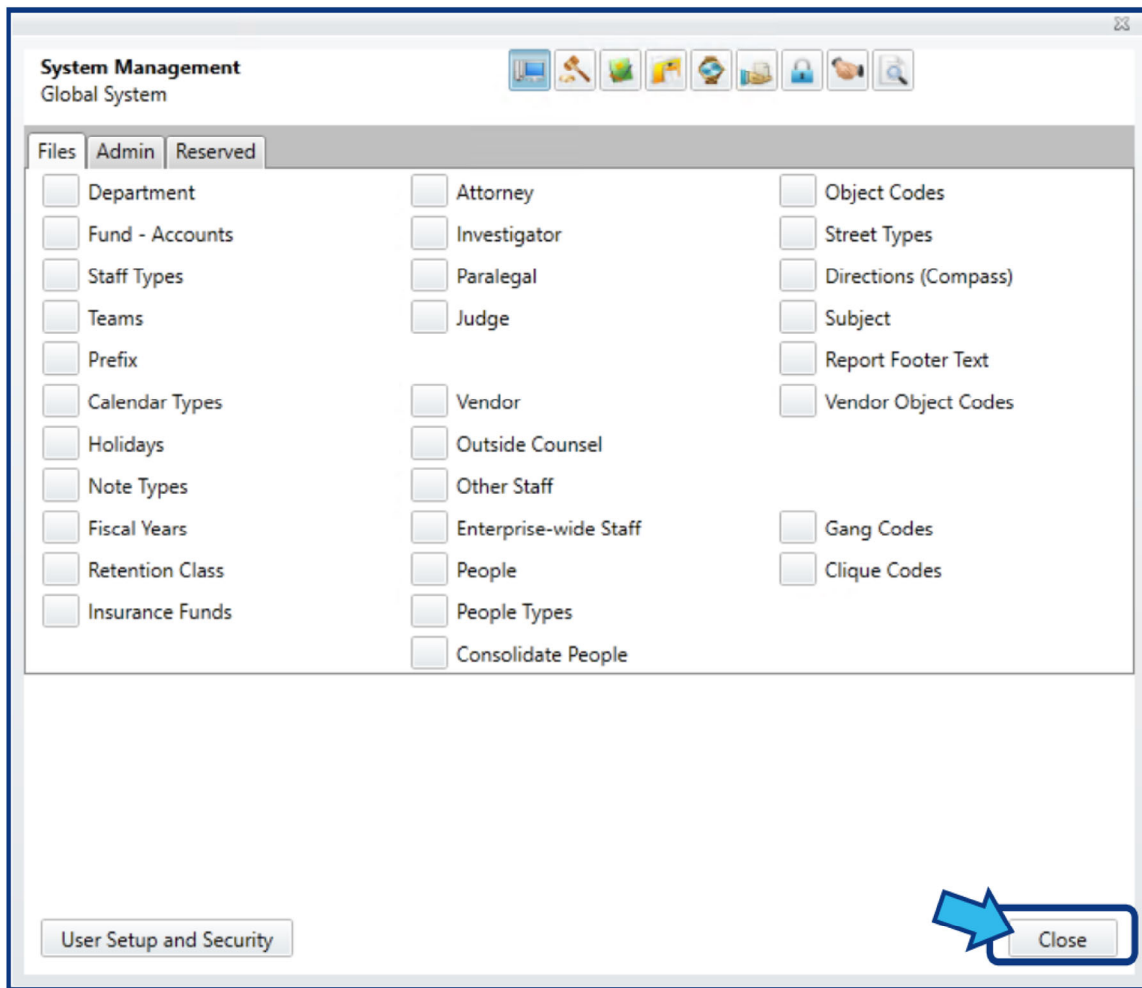
Step 9. In the Outside Counsel Maintenance window, press Close.

The new **Outside Counsel** record will not yet be visible. Press the **Close** button located in the bottom-right corner of the **Outside Counsel Maintenance** window.



Step 10. In the System Management window, press Close.

Press the **Close** button located in the bottom-right corner of the **System Management** window.



Was this article helpful?

0 out of 0 found this helpful

Have more questions? [Submit a request](#)



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 Search

Articles in this section 

Creating, editing, and deleting contacts



Aaron Jones

10 months ago · Updated

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Managing contacts is done in the **System Management** module. Follow [these steps](#) to open the **Find a Person** window in **System Management**.

Find a Person

Copy to Clipboard (F9) Type [dropdown]

Enter the last name of a person to search for, or click advanced for more search field. Advanced Search [input]

Name	Phone	Company
------	-------	---------

New Edit Delete Print Files Cancel

In this window, press **New** to create a new contact. In order to edit or a delete a contact, first perform a search using the search box at the top-right of the window, or by pressing the **Advanced Search** button to the left of the search box, entering your search criteria, and pressing **Search**.

Once you have performed a search, select the contact from the Search Results grid and press the **Edit** button to edit the contact, or the **Delete** button to delete the contact.

Was this article helpful?

0 out of 0 found this helpful

Have more questions? [Submit a request](#)



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 Search

Articles in this section 

Create New Litigation Matter



Julie Stoltz

20 days ago · Updated

[Follow](#)

Need a reminder? Use the [Quick Reference Guide](#).

Need more details? Check out the [Standard Guide](#).

Quick Reference Guide

There are 5 steps to complete this task:

1. [Open the Litigation module.](#)
2. [Press New.](#)
3. [In the New File window, press Auto.](#)

4. [In the New Litigation Entry window, fill out all mandatory fields.](#)
5. [Press Save.](#)

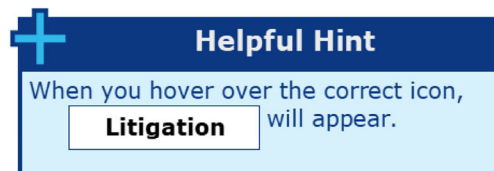
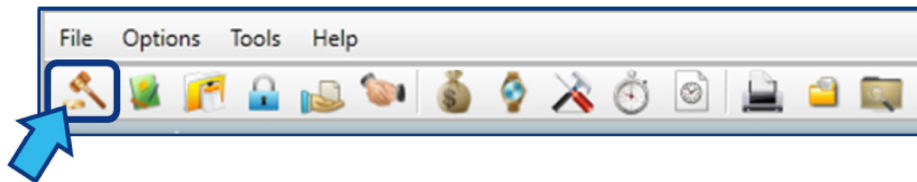
Standard Guide

Step 1. Open the Litigation module.

There are 2 ways to open this module.

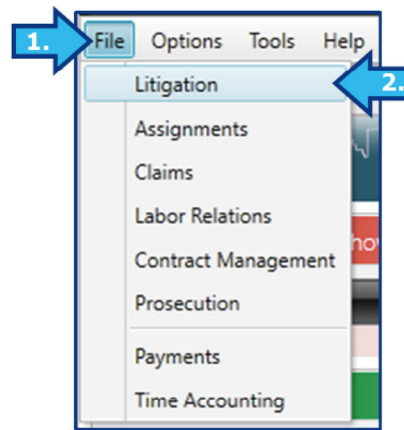
1-Step Option:

Press the **Litigation** icon on the **Global Toolbar**.



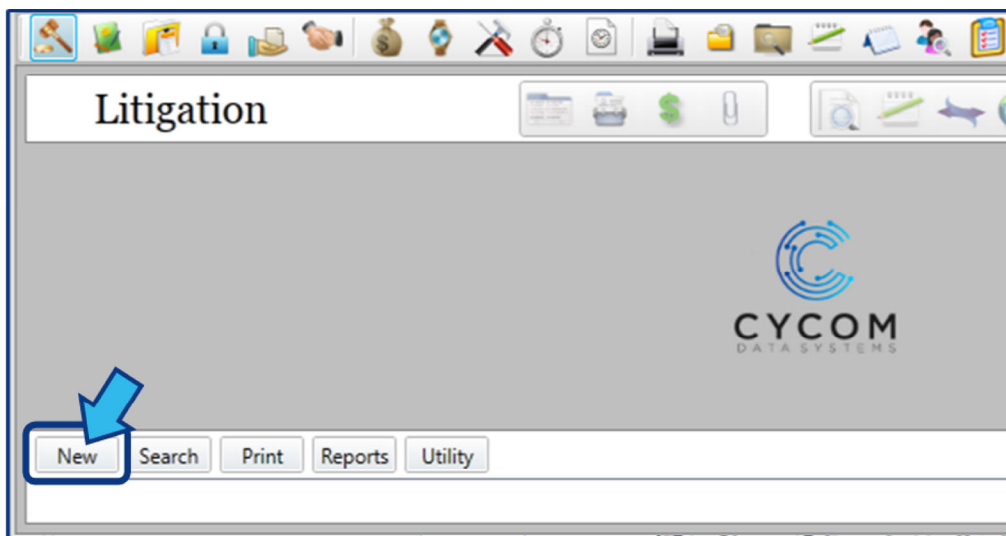
2-Step Option:

1. On the **Menu Bar**, press **File**.
2. Press **Litigation**.



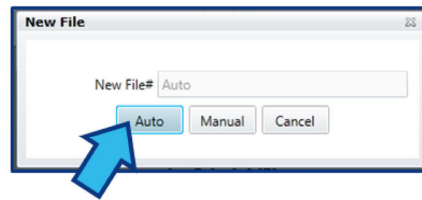
Step 2. Press New.

The **New** button is located in the bottom-left corner of the screen.



Step 3. Press Auto in the New File window.

A **New File** window appears after you complete Step 2. Press the **Auto** button to automatically generate a **File Number** for the new matter in accordance with the naming convention of your office.

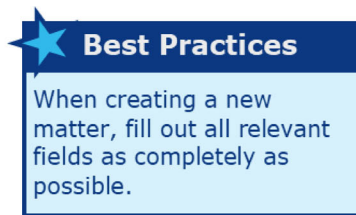


Step 4. Fill out the mandatory fields in the New Litigation Entry window.

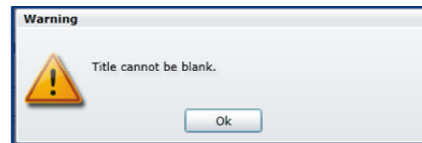
A **New Litigation Entry** window appears after you complete Step 3. Fill out the mandatory fields for the matter.

Looking for field descriptions?

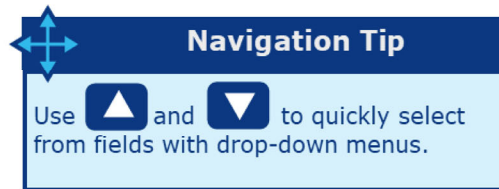
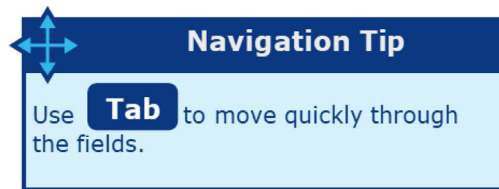
Check out the [New Litigation Entry Field Description Guide](#).



Mandatory fields are marked with an asterisk (*). The new litigation cannot be saved until values for these fields are provided. A **Warning** window will appear if you try to save a new litigation without values in these fields.



You can navigate from field to field using tab, and can cycle through drop-down lists with the up and down arrow keys.



Step 5. Press Save.

The **Save** button is located in the bottom-right corner of the **New Litigation Entry** window.

The screenshot shows the 'New Litigation Entry' window with various fields for data entry. The 'Save' button is located in the bottom-right corner and is highlighted with a blue arrow. The window title is 'New Litigation Entry' and it includes a red asterisk indicating mandatory fields. The fields include: *Title, *Attorney, Atty 2, OS Counsel, *Staff, Inves, Team, Cross Ref, Type, *Category, Cause, RMAT, Judge, Court, Court Number #, *Open Date (1/25/2019), Incident, Filed, Served, *Dept, Fund, *Short Desc, Location, Location Code, Abstract / Facts of the Case, Primary Party, Related Parties, Witnesses, Contacts, and U Prayer Amt (\$0.00). A 'Spell Check' button is also visible.

After saving, the **Basic Tab** of your new **Litigation** matter will appear.

Litigation

Basic | Description | Evaluation | Notes | Equipment | Keywords | File Mgmt

Title Jones, Bob v. City of Richmond			Trial		
File #	16-0057	Type	D	Cause	02
Attorney	SAB	Cat	DAN	RMAT	
Attorney		Status	Open		
Team		Disposition			
Staff	DEMO	Cross Ref	Multiple Matters		
OS Counsel		Court	LAS	#	18-12340-A
Inves		Judge	TD		
Dept	PW		Public Works		
Fund					
Short Desc: 02 - Trip and Fall					

New | Search | Print | Reports | Utility | Close Matter

> Start | 00:00:00 | ✓ | ✗

Close

File #: 16-0057
File Name: Jones, Bob v. City of Richmond
Created by: Demo Cycom User(DEMO) On: 12/30/16

New Litigation Entry Field Description Guide

1. [Title](#)
2. [Attorney](#)
3. [Attorney 2 \(Atty 2\)](#)
4. [Outside Counsel \(OS Counsel\)](#)
5. [Staff](#)
6. [Investigator \(Inves\)](#)
7. [Team](#)
8. [Cross Reference \(Cross Ref\)](#)
9. [Type](#)
10. [Category](#)
11. [Cause](#)
12. [RMAT](#)
13. [Court](#)
14. [Court Number #](#)
15. [Judge](#)
16. [Open Date](#)

17. [Incident](#)
18. [Filed](#)
19. [Served](#)
20. [Department \(Dept\)](#)
21. [Fund](#)
22. [Short Description \(Short Desc\)](#)
23. [Location](#)
24. [Location Code](#)
25. [Abstract / Facts of the Case](#)
26. [Primary Party](#)
27. [Related Parties](#)
28. [Witnesses](#)
29. [Contacts](#)
30. [Prayer Amount \(LI Prayer Amt\)](#)

The screenshot shows the 'New Litigation Entry' form with the following fields and callouts:

- 1: *Title
- 2: *Attorney
- 3: Atty 2
- 4: OS Counsel
- 5: *Staff
- 6: Inves
- 7: Team
- 8: Cross Ref
- 9: Type
- 10: *Category
- 11: Cause
- 12: RMAT
- 13: Court
- 14: Court Number #
- 15: Judge
- 16: *Open Date (1/28/2019)
- 17: Incident
- 18: Filed
- 19: Served
- 20: *Dept
- 21: Fund
- 22: *Short Desc
- 23: Location
- 24: Location Code
- 25: Abstract / Facts of the Case
- 26: Primary Party
- 27: Related Parties
- 28: Witnesses
- 29: Contacts
- 30: LI Prayer Amt (\$0.00)

A red note in the top right corner states: "** are mandatory fields."

The configuration of the CityLaw/CountyLaw installation in your office determines which fields are mandatory or disabled, and which fields are visible. If you discover an issue with the field

configuration in the New Litigation Entry window, please contact your System Administrator.

1. Title

The name of the new Litigation matter.

This is a mandatory field.

2. Attorney

The attorney to whom the litigation was given. If you are an attorney, this field will auto-populate with your username.

3. Attorney 2 (Atty 2)

An additional attorney, if applicable.

4. Outside Counsel (OS Counsel)

Outside Counsel used on the litigation.

5. Staff

The staff on the litigation matter, or the staff responsible for managing the entry of this litigation.

6. Investigator (Inves)

The investigator on the litigation matter.

7. Team

The team for the litigation matter.

8. Cross Reference (Cross Ref)

It is possible to cross-reference another matter when creating a new case. See [Cross-referencing a matter](#) to learn more.

9. Type

Each Category code has a subset of Type codes. Some examples of Type codes are Procurement, Licensing, Civil Rights, Personnel, and Zoning.

We use this field to designate what type of party the county is

10. Category

Category codes separate litigation matters into classifications relevant to your office. Some examples of Categories are Contracts, Ordinances, Opinions, and Resolutions.

This is a mandatory field.

11. Cause

...

We use the Wisconsin Supreme Court case cause codes in this section

12. RMAT

...

13. Court

... We enter either the circuit court or federal court - choose the appropriate court

14. Court Number

... We enter the case number assigned by the court

15. Judge

...

16. Open Date

... Date the file was opened in the corporation counsel office

17. Incident

... the date that the cause accrued , if we know. Usually found in the pleadings. Use to check if statute of limitations has passed.

18. Filed

... the date the action was filed by the county or the plaintiff if the county is a defendant

19. Served

... the date the county is served if we are a defendant, otherwise leave blank

20. Department (Dept)

The Department field represents the entity to whom the services of the Litigation are being rendered.

This is a mandatory field.

21. Fund

... we do not use this field

22. Short Description (Short Desc)

... Quick description of what the case is about

23. Location

... we may use this field for code violations

24. Location Code

... we do not use this field

25. Abstract / Facts of the Case

attorney enters

...

26. Primary Party

... Would be plaintiff, defendant , subject individual, ward (proposed), respondent, and child in a TPR

27. Related Parties

... Attorney, GAL for a Primary Party

28. Witnesses

...

29. Contacts

... employees, law enforcement or whomever we might need to contact

30. Prayer Amount (Prayer Amt)

...

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Articles in this section

Assignment matter screens



Aaron Jones

1 year ago · Updated

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Basic Tab

The **Basic Tab** displays all the codes and personnel assigned to the matter. The Title, File Number (or Case Number), and Description are also visible here.

Assignment

Basic | Description | Status | Notes | Contacts | File Mgt

Title: Above standard street lighting

File #: A13-0264

Staff: [Dropdown]

Category: CON

Subject: [Dropdown]

Attorney: MBB

Inv: [Dropdown]

Type: SUN

Priority: 1

Attorney: CTF

Team: [Dropdown]

Action: REV

Status: O

OS Counsel: WRBD

Cross Ref: [Dropdown]

Dept: PW Public Works

Received: 10/24/2013

CstCtr: [Dropdown]

Target: 10/30/2013

Desc: Preliminary Order setting the date of City Council Public Hearing for November 6, 2013 to approve construction of above-standard street lighting along the east side of Robert Street from 12th Street to University Avenue, and approving the annual operation and maintenance costs to be assessed to benefitted properties via the Right-of-Way program. (File No. 19150, Assessment No. 135102)

Complete: [Dropdown]

Disposition: C

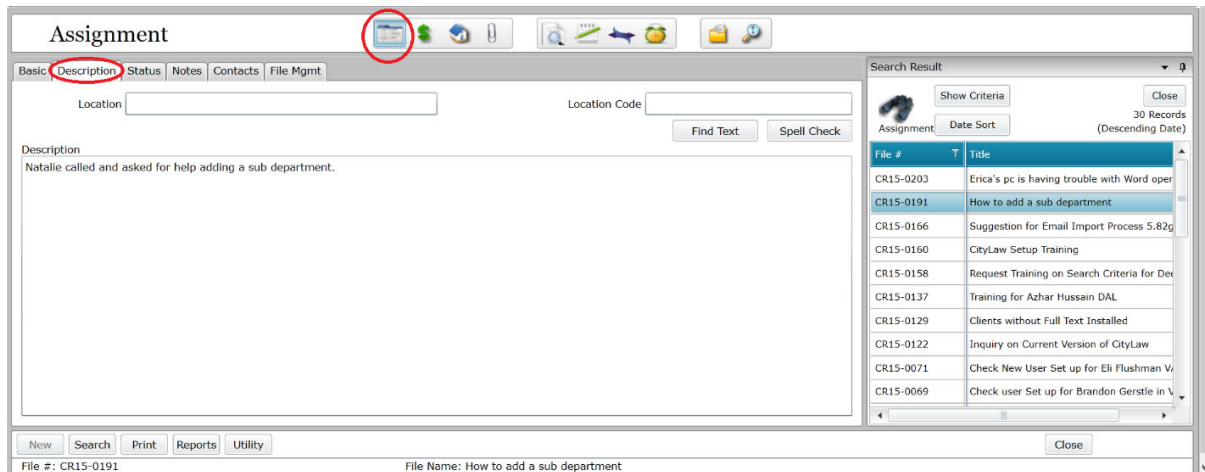
New Search Print Reports Utility

> Start 00:00:00

File #: A13-0264 File Name: Above standard street lighting

Description Tab

In addition to the Description text of the Assignment matter, the **Description Tab** also contains the Location (or Address) and Location Code fields.



Location and Address Entry

This field is for assignments related to Real Estate issues, such as Deeds, Eminent Domain, Condemnation, etc. Property addresses are to be entered here. Be consistent with address abbreviations formats (e.g. "Ave" versus "Avenue", "Rd" versus "Road", etc.) as this will affect search results.

Best Practice: Use abbreviations without an ending period. For example:

Use: In place of:

Apt	Apartment
Ave	Avenue
Bvld	Boulevard
Dr	Drive
Hwy	Highway
Rd	Road
St	Street
Ste	Suite

Use: **In place of:**

N, S, E, W North, South, East, West

Location Code

The is for Tax Map Numbers, APNs, and the like. This is not a required field.

Description Text

The Description text appears on the Basic Tab as well. Press the **Spell Check** button to check the spelling of the text in this field. Press the **Find Text** button to search for text in this field.

Status Tab

The **Status Tab** contains a log of text entries designed for tracking activity on the matter.

The screenshot shows the 'Assignment' application interface. At the top, there is a navigation bar with tabs for 'Basic', 'Description', 'Status', 'Notes', 'Contacts', and 'File Mgmt'. The 'Status' tab is selected and circled in red. Below the navigation bar, there is a toolbar with icons for various actions. The main content area is divided into two sections. The top section has a 'Status' dropdown menu set to 'O', a 'Received Date' field with the value '4/12/2015', and three buttons: 'Make Entry', 'Find Text', and 'Spell Check'. The 'Make Entry' button is circled in red. Below this section is a large text area for logging activity. The bottom section has a 'Disposition' dropdown menu, a 'Complete Date' field, and a 'Days' field. It also includes 'Make Entry', 'Find Text', and 'Spell Check' buttons.

Status Section

The top section of the Status tab is the **Status Section**. From here you may do the following.

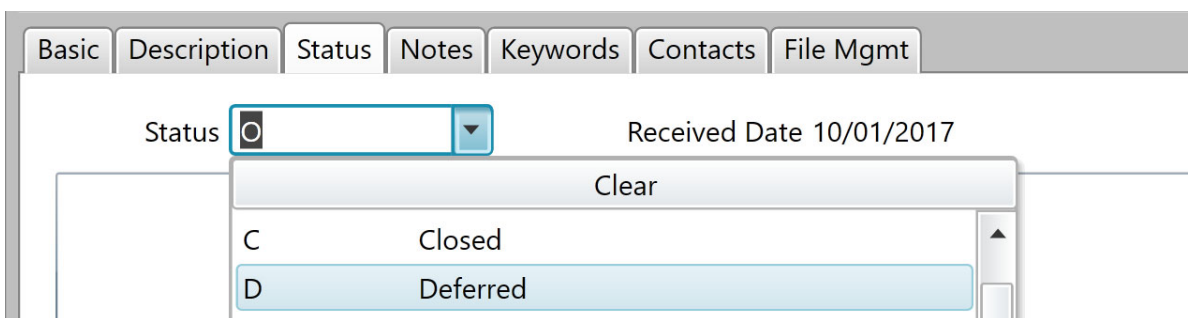
1. Change the **Status Code** of the matter
2. View its **Received Date** and **Target Date**, if applicable
3. Perform a **Spell Check**
4. **Find Text** in the Status entries
5. Make a new **Status Entry**.



The screenshot shows the top section of the Status tab. It includes a navigation bar with tabs: Basic, Description, Status, Notes, Keywords, Contacts, and File Mgmt. Below the navigation bar, there is a Status dropdown menu set to 'O', a Received Date field showing 10/01/2017, and a Target Date field showing 10/31/2017. To the right of these fields are three buttons: Make Entry, Find Text, and Spell Check. Below this section is a large empty text area with a vertical scrollbar on the right.

Status Code

In our example, the **Status Code** is set to "O" for "Open". Press the dropdown arrow to change the **Status Code**.



The screenshot shows the Status dropdown menu open. The dropdown menu has a 'Clear' button at the top. Below it, there are two options: 'C Closed' and 'D Deferred'. The 'D Deferred' option is highlighted with a blue background. The 'Status' field in the background is still set to 'O'.

Status Entry

Press the **Make Entry** button to create a Status entry. The **Make Entry** window will appear.

The **Description** field (“Desc”) is auto-populated with the current date and time, and the username of the current user. Short notes on the status of the matter are to be entered after this text.

Best Practice: Be as concise as possible when creating Status entries (e.g. “Contract sent back to department for review.”) and give more detail by creating a **Note** on the matter where necessary. Reference your note in your Status entry.

Disposition Section

The bottom half of the Status tab is the **Disposition Section**. From here you may do the following.

1. Change the **Disposition Code**
2. Enter a **Complete Date** for when the assignment was completed
3. View the number of **Days** the assignment was open
4. Perform a **Spell Check**
5. **Find Text** in the disposition entries
6. Make a new **Disposition Entry**

Disposition Complete Date Days :

Make Entry Find Text Spell Check

1

If the matter you are viewing has not been dispositioned, all fields will appear empty as in the screenshot above.

Disposition Entry

Press the **Make Entry** button to make a new **Disposition Entry**. The **Make Disposition Entry** window will appear.

Make Disposition Entry

Save Spell Check Cancel

10/31/17 10:17am (UTC-05:00)Eastern Standard Time - ADJ -

Desc

Make this a time accounting entry also

Date 10/31/2017 Staff ADJ CyDept

Matter CR17-0033 Bayview Park Cross

Team Task Hours 0.00

Total for 10/31/2017 0.00

Dispositioning a Matter

When a matter is dispositioned, a **Disposition Entry** should always be created. However, creating a **Disposition Entry** will not automatically disposition the matter.

To disposition the matter, set its **Disposition Code**. A date should also be entered in the **Complete Date** field.

Note: You will not see the **Days** value update unless a **Received Date** has been entered for the matter. You made set the matter's **Received Date** on the **Basic** tab.

Disposition Complete Date Days : 30

Make Entry Find Text Spell Check

10/31/17 10:17am (UTC-05:00)Eastern Standard Time - ADJ - Signed off on Bayview Park Cross.

Notes Tab

Notes can be created by Attorneys and Staff.

Assignment CR17-0033 Bayview Park Cross

Basic Description Status Notes Keywords Contacts File Mgmt

Date	Staff	Title	Type	Modified

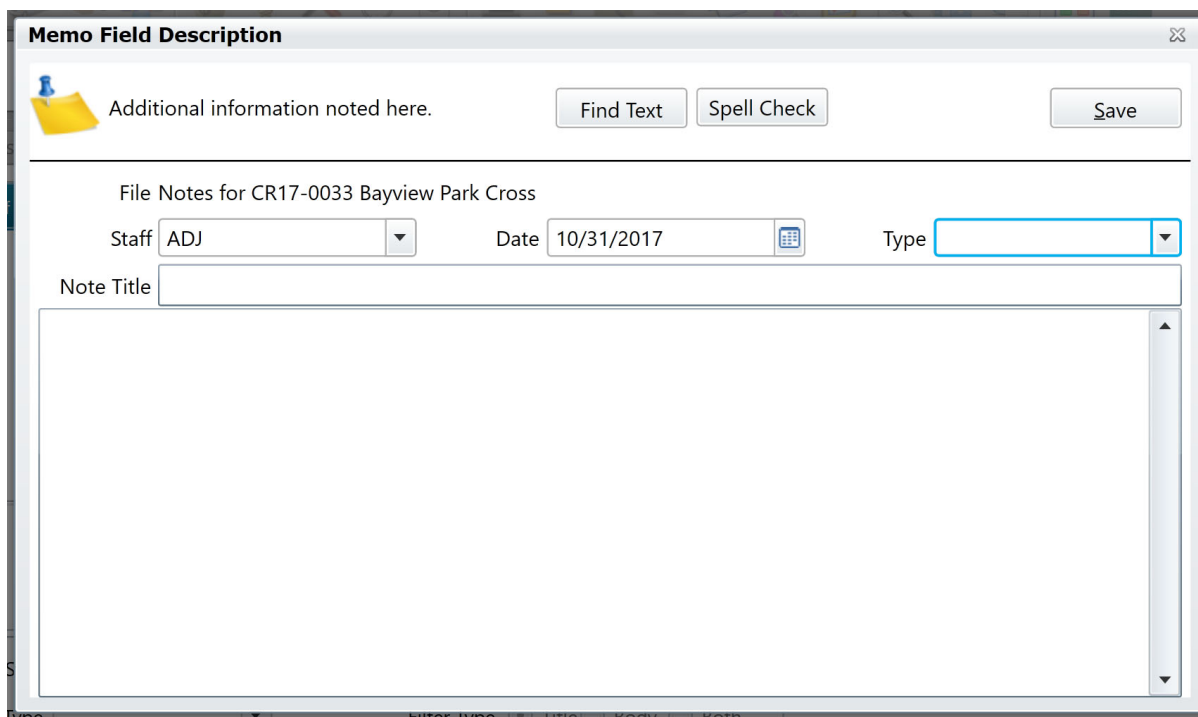
New Edit Copy To Delete Print

Show Only All Staff Type Date From To Filter

Filter Type Title Body Both

Creating a Note

Press the **New** button to create a new **Note**. The **Memo Field Description** window opens.



Memo Field Description

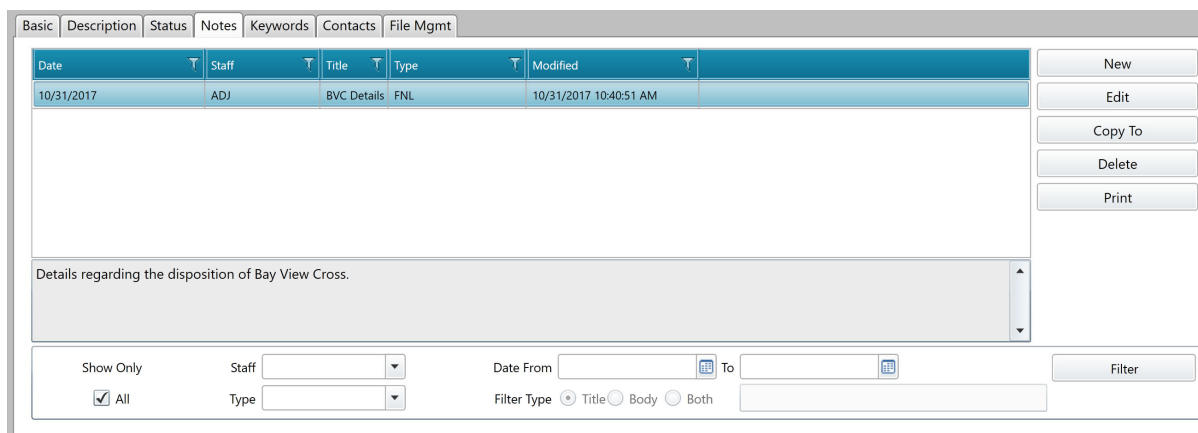
Additional information noted here. Find Text Spell Check Save

File Notes for CR17-0033 Bayview Park Cross

Staff Date Type

Note Title

Select a **Type Code** for the Note and enter a **Title** and the **Body** content, then press the **Save** button to add the Note to the matter. The **Memo Field Description** window closes and you are returned to the **Notes** tab.



Basic | Description | Status | Notes | Keywords | Contacts | File Mgmt

Date	Staff	Title	Type	Modified
10/31/2017	ADJ	BVC Details	FNL	10/31/2017 10:40:51 AM

Details regarding the disposition of Bay View Cross.

Show Only All Staff Date From To Filter

Filter Type Title Body Both

New Edit Copy To Delete Print

Select a Note in the Notes Grid, and the gray read-only textbox below will display a preview of the Note's content.

Editing a Note

On the Notes tab, select a Note in the Notes Grid and press the **Edit** button on the right-hand side of the Notes tab to edit it. You may also double-click the Note in the Notes Grid.



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Create New Assignment Matter



Julie Stoltz

20 days ago · Updated

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Need a reminder? Use the [Quick Reference Guide](#).

Need more details? Check out the [Standard Guide](#).

Quick Reference Guide

There are 5 steps to complete this task:

1. [Open the Assignments module](#).
2. [Press New](#).
3. [In the New File window, press Auto](#).

4. [In the New Assignment Entry window, fill out all mandatory fields.](#)
5. [Press Save.](#)

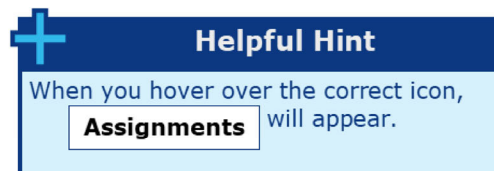
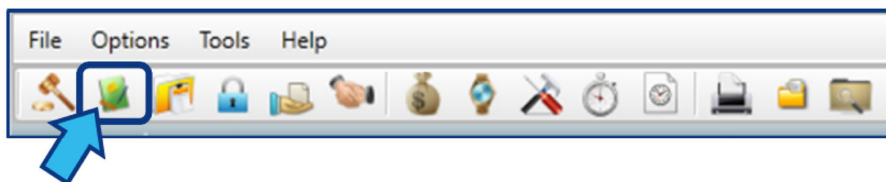
Standard Guide

Step 1. Open the Assignments module.

There are 2 ways to open this module.

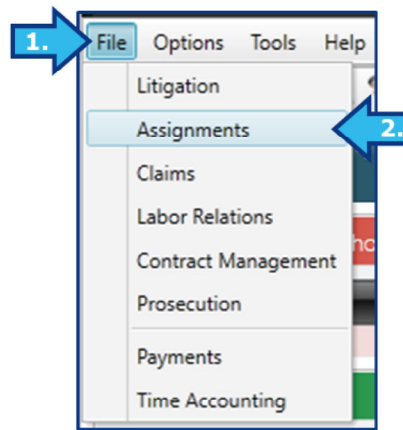
1-Step Option:

Press the **Assignments** icon on the **Global Toolbar**.



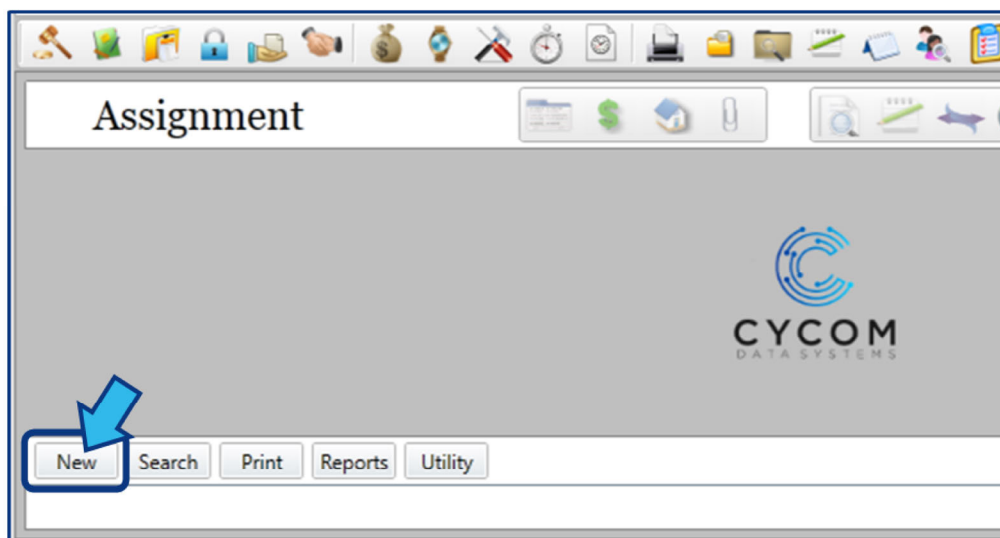
2-Step Option:

1. On the **Menu Bar**, press **File**.
2. Press **Assignments**.



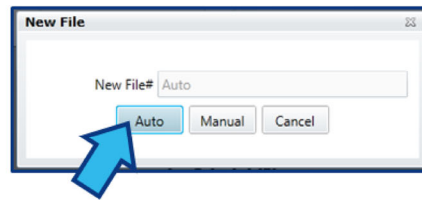
Step 2. Press New.

The **New** button is located in the bottom-left corner of the screen.



Step 3. Press Auto in the New File window.

A **New File** window appears after you complete Step 2. Press the **Auto** button to automatically generate a **File Number** for the new matter in accordance with the naming convention of your office.

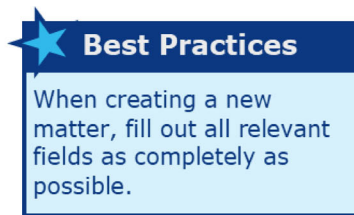


Step 4. Fill out the mandatory fields in the New Assignment Entry window.

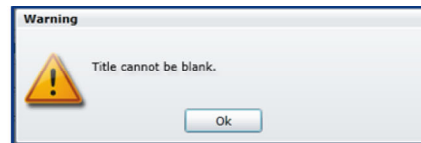
A **New Assignment Entry** window appears after you complete Step 3. Fill out the mandatory fields for the matter.

Looking for field descriptions?

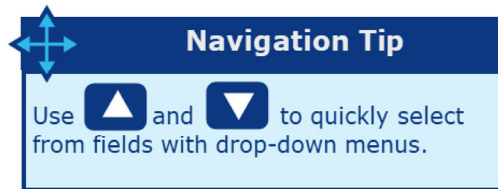
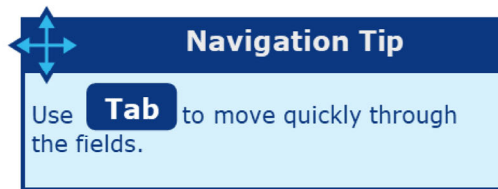
Check out the [New Assignment Entry Field Description Guide](#).



Mandatory fields are marked with an asterisk (*). The new assignment cannot be saved until values for these fields are provided. A **Warning** window will appear if you try to save a new assignment without values in these fields.



You can navigate from field to field using tab, and can cycle through drop-down lists with the up and down arrow keys.



Step 5. Press Save.

The **Save** button is located in the bottom-right corner of the **New Assignment Entry** window.

The screenshot shows the 'New Assignment Entry' window with various input fields. The 'Save' button is highlighted with a blue arrow in the bottom-right corner. The window contains the following fields:

- *Title (text input)
- Received (date input, 1/25/2019)
- Target (text input)
- *Attorney (dropdown)
- Attorney2 (dropdown)
- OS Counsel (dropdown)
- Staff (dropdown)
- Inves (dropdown)
- Team (dropdown)
- *Category (dropdown)
- Type (dropdown)
- Action (dropdown)
- AS Track (dropdown)
- Priority (dropdown)
- *Status (dropdown, O)
- Contact (text input with search and close buttons)
- *Dept (text input with search button)
- Fund (text input with search button)
- *Description (text area)
- Spell Check (button)
- Save (button, highlighted with a blue arrow)
- Cancel (button)

* are mandatory fields.

After saving, the **Basic Tab** of your new **Assignment** matter will appear.

Assignment

Basic | Description | Status | Notes | Keywords | Contacts | File Mgmt

Title: John Doe vs City Dog Pound

File #: 1900001 Staff: DEMO Category: MEMO AS Track: []

Attorney: SAB Inves: [] Type: [] Priority: []

Attorney 2: [] Team: [] Action: [] Status: O

OS Course: [] Cross Ref: []

Dept: PD Police Department Received: 1/16/2019

Fund: [] Target: []

Desc: John Doe claims his dog was taken out of his yard by the City Pound.

Complete: [] Disposition: []

New Search Print Reports Utility Close Matter > Start 00:00:00 Close

File #: 1900001 File Name: John Doe vs City Dog Pound Created by: Demo Cycom User(DEMO) On: 01/16/19

New Assignment Entry Field Description Guide

1. **Title**
2. **Received (Date)**
3. **Target (Date)**
4. **Attorney**
5. **Attorney 2**
6. **Outside Counsel (OS Counsel)**
7. **Staff**
8. **Investigator (Inves)**
9. **Team**
10. **Category**
11. **Type**
12. **Action**
13. **AS Track**
14. **Priority**
15. **Status**
16. **Contact**

17. [Department \(Dept\)](#)
18. [Fund](#)
19. [Description](#)

The screenshot shows the 'New Assignment Entry' window with the following fields and callouts:

- 1: *Title
- 2: Received (1/28/2019)
- 3: Target
- 4: *Attorney
- 5: Attorney2
- 6: OS Counsel
- 7: Staff
- 8: Inves
- 9: Team
- 10: *Category
- 11: Type
- 12: Action
- 13: AS Track
- 14: Priority
- 15: *Status
- 16: Contact
- 17: *Dept
- 18: Fund
- 19: *Description

*** are mandatory fields.

Buttons: Save, Cancel, Spell Check

The configuration of the CityLaw/CountyLaw installation in your office determines which fields are mandatory or disabled, and which fields are visible. If you discover an issue with the field configuration in the New Assignment Entry window, please contact your System Administrator.

1. Title

The name of the new Assignment matter.

This is a mandatory field.

2. Received (Date)

The date the assignment was received. The value will default to the current date.

This is a mandatory field.

3. Target (Date)

The estimated date the assignment will be completed. Entering a Target Date will automatically place it on the calendar.

4. Attorney

The attorney to whom the assignment was given. If you are an attorney, this field will auto-populate with your username.

5. Attorney 2

An additional attorney, if applicable.

6. Outside Counsel (OS Counsel)

Outside Counsel used on the assignment.

7. Staff

The staff to whom the assignment was given, or the staff responsible for managing the entry of this assignment.

8. Investigator (Inves)

The investigator used on the assignment.

9. Team

The Team responsible for the assignment.

10. Category

Category codes separate assignments into classifications relevant to your office. Some examples of Categories are Contracts, Ordinances, Opinions, and Resolutions.

This is a mandatory field.

11. Type

Each Category code has a subset of Type codes. Some examples of Type codes are Procurement, Licensing, Civil Rights, Personnel, and Zoning.

12. Action

Action codes describe the service to be performed by the Attorneys or Staff member on the assignment matter (e.g. Review, Prepare, Attend, Advice).

13. AS Track

... We do not use this field

14. Priority

The priority assigned to this matter.

15. Status

The current state of the matter (e.g. Open, Closed, Pending).

This is a mandatory field.

16. Contact

It is best practice to assign a contact to every Assignment matter. This might be a Department contact or a non-City/County employee.

17. Department (Dept)

The Department field represents the entity to whom the services of the Assignment are being rendered.

This is a mandatory field.

18. Fund

... We do not use this field

19. Description

This is a description of the nature of the assignment for the purpose of understanding its scope and aiding in future searches for this or similar assignments.

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Klockow, Dawn ▾

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Articles in this section ▾

Navigation and Data Entry Tips



Aaron Jones

1 year ago · Updated

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Mouse Commands and the Context Menu

Clicking the right mouse button will display the **Context Menu**. Standard Windows functionality such as Copy and Paste are available in CityLaw/CountyLaw text fields. Additional right-click options are available in specific fields. These include **Send Email** for Staff fields, **Duplicate** and **Dispo** (for Disposition) on Calendar events, and **New**, **Edit**, and **Delete** on Payment fields.

Keyboard Shortcuts

The keyboard is the quickest method of data entry. Standard Windows shortcuts are available in CityLaw/CountyLaw text fields:

Ctrl + X	Cut
Ctrl + C	Copy
Ctrl + V	Paste
Ctrl + Z	Undo
Tab	Move to next field
Shift + Tab	Move to previous field

Copy Contact or Party

With a Contact or Party name highlighted:

F9 Copies the name and address to the Windows clipboard.

Drop-down Lists


Click on a drop-down list arrow to display all valid codes for a particular field, or type a known code directly into the box.

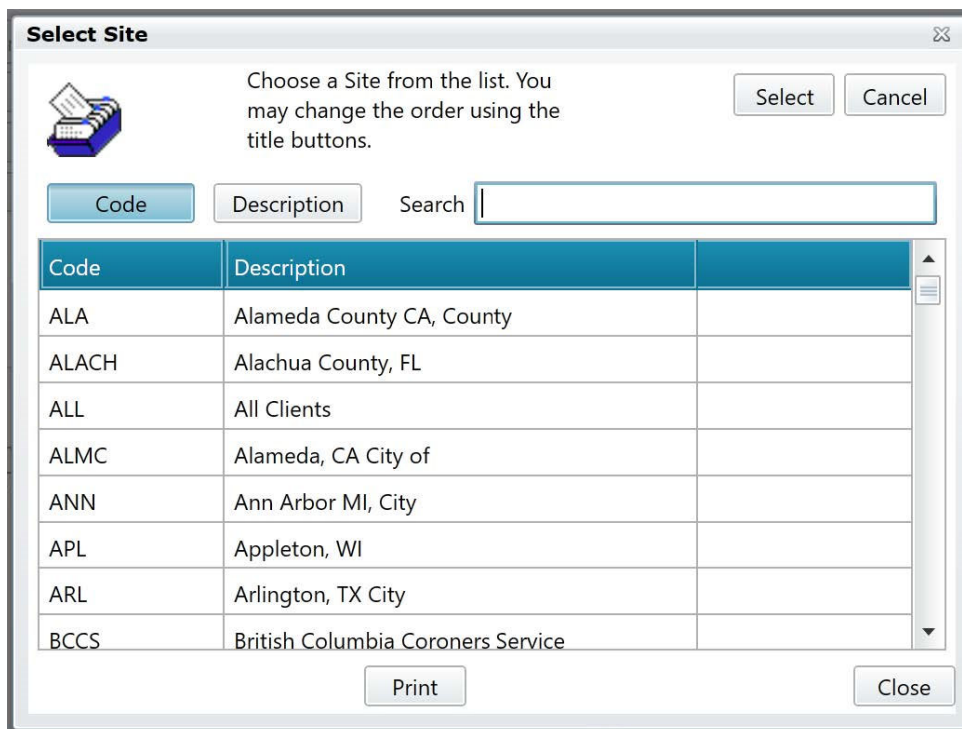


With the drop-down box selected, you may also hit the down arrow key on your keyboard to display the list of valid codes.


The system will not allow you to type a code which is not in the drop-down list of valid codes.

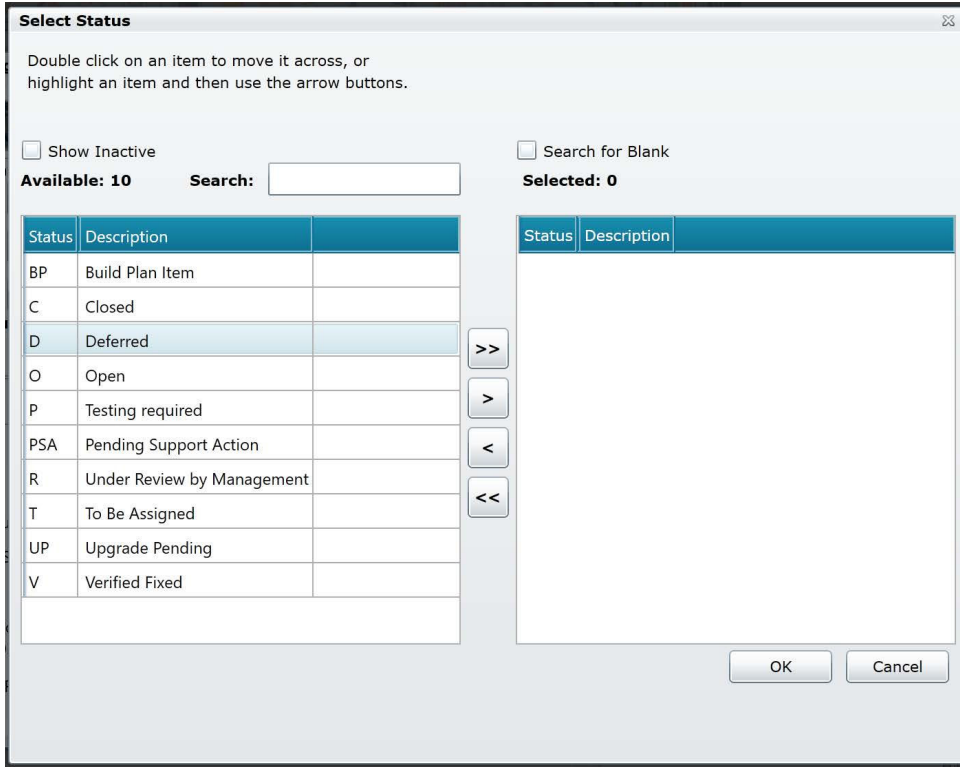
Ellipsis Buttons

Select an ellipsis button  to display all the available choices for a field and select one of them. The list of choices can be sorted by Code or Description. Highlight your selection and hit the Select button to insert that value.



Multi-Select Buttons


Select a multi-select button  to display all the available choices for a field, and one or more of them. Use the arrow buttons to select and deselect codes.

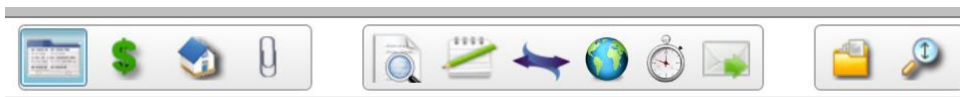


NOTE

When using multi-select buttons in the **Search** window, marking the **Search for Blank** checkbox above the **Selected** list will include matters in your search results which have a blank value in that field. This is a good way to search for cases with incomplete entries, for example.

Show Search Results

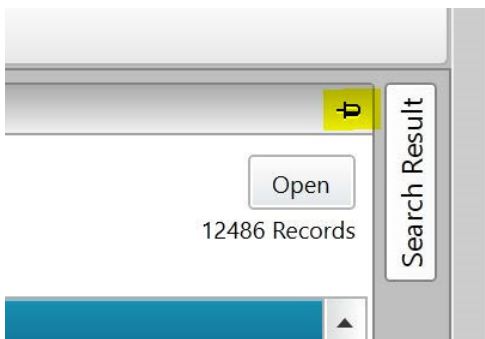
If the **Search Results** window has been closed or collapsed, selecting the magnifying glass  at the right-hand side of the Module Toolbar will display it again.



Alternatively, select the **Search Result** tab at the right side of the Module screen:



Then select the thumbtack button to pin it so it remains open:



Entering Dates

A date can be typed directly into a date field in the format “mmddy”, or “mmdyyyy”.

Lookup Dates			
	Empty	From	To
Received	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Target	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Complete	<input type="checkbox"/>	103118	<input type="text"/>

Lookup Dates			
	Empty	From	To
Received	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Target	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Complete	<input type="checkbox"/>	10312018	<input type="text"/>

Hit the Tab key to navigate away from the date field and the date will auto-format to “mm/dd/yyyy”.

Lookup Dates			
	Empty	From	To
Received	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Target	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Complete	<input type="checkbox"/>	10/31/2018	<input type="text"/>

With a date field selected, use the arrow keys on the keyboard to open the Date Picker and navigate between dates.

Lookup Dates

	Empty	From	To
Received	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Target	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Complete	<input type="checkbox"/>	10/31/2018	<input type="text"/>

October - 2018

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10


The Date Picker can also be opened by clicking the **Date Picker** button: 

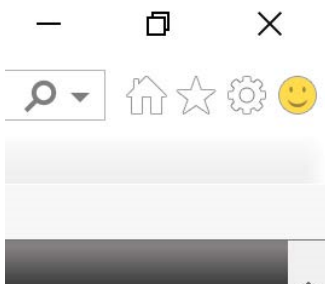
Saving Data

In a screen or window, if there is no **Save** button, or if the system does not prompt the user to save, then data will be saved automatically when the user moves to another screen, such as from the Basic tab of a Matter to the Status tab.

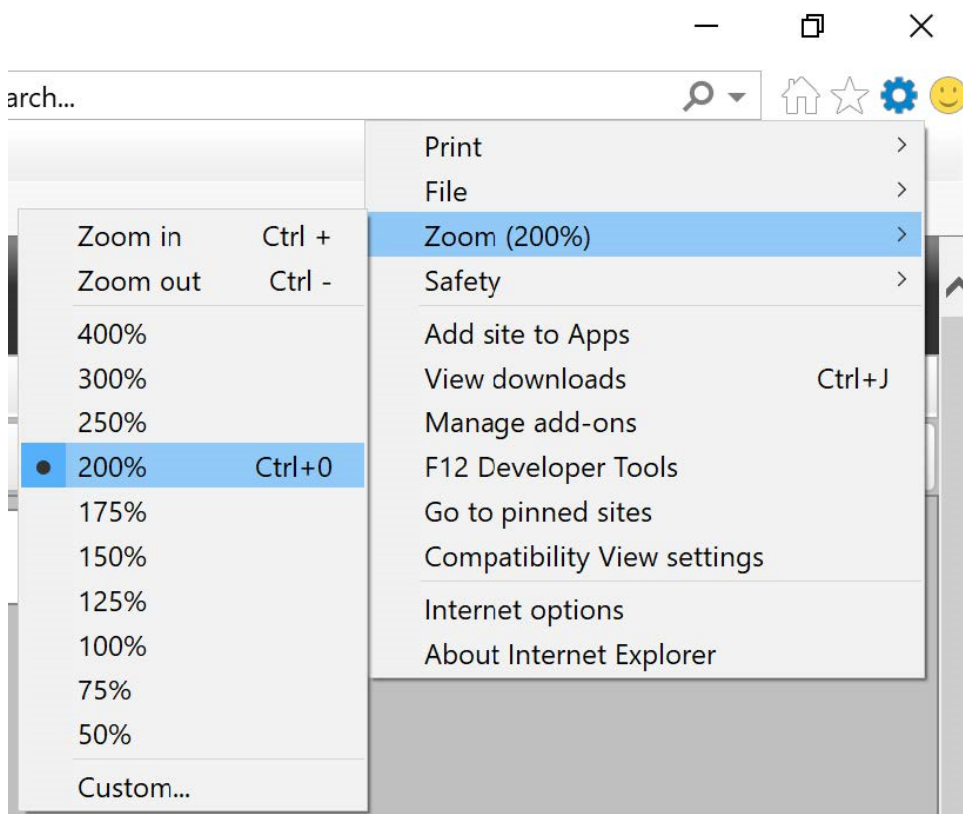
Browser Zoom

CityLaw/CountyLaw was designed to integrate with Internet Explorer's Zoom feature, allowing you to adjust on-screen text and fields to a comfortable magnification.

In Internet Explorer 11, to adjust the Zoom setting, select the **Settings** button  at the top-right of the browser.



The **Settings** menu opens. Point to "Zoom", then select the desired zoom percentage.



The zoom level can be increased or decreased by one step by holding the **Control (Ctrl)** key on your keyboard and hitting the **Plus (+)** or **Minus (-)** keys, respectively.

To return to the default screen zoom level, hold **Control (Ctrl)** and then hit the **Zero (0)** key. Your default zoom level will vary depending on the size of your computer monitor.

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Party management



Aaron Jones

9 months ago · Updated

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Parties, Witnesses, Contacts, and Captions are managed in the **Parties** section of a case. On the **Parties** tab of the Parties section, primary parties can be added, edited, and deleted. An unlimited number of primary party contacts can be added to a case.

The screenshot displays a web application interface for managing parties. At the top, there are tabs for 'Parties', 'Witnesses', 'Contacts', and 'Caption'. Below the tabs are buttons for 'New', 'Edit', and 'Delete'. A 'Filter:' dropdown menu is set to 'All', with additional 'New', 'Edit', and 'Delete' buttons. The main area is divided into two columns. The left column has a table with headers 'Primary Party Name' and 'Type', containing one entry: 'Johnson, L'Douglas W. Plaintiff'. The right column has a table with headers 'Related Party Name' and 'Relationship', containing one entry: 'Pellette, Robert Attorney'. Below the right table is a section titled 'Address of party' with a 'F9 to copy clipboard' note, containing the address: 'Johnson, L'Douglas W., 2014 Main St., Ste. 227, Dallas, TX 75201, Phone 214-243-2156'. At the bottom, there are two text input fields: 'Primary Remark' (with a red 'CMS claimant' label) and 'Related Remarks', each with a 'Modify' button. A 'Served' checkbox and a 'Date Served' field with a 'Modify' button are also present.

For each primary party contact, an unlimited number of related party contacts can be added. Select a primary party contact in the left-hand list to view their related parties on the right-hand side. Users can add a remark to a primary or related party to describe their relation to this particular case (up to 360 characters).

Both the **Party Type** and **Related Party Type** codes ("Relation" column) are customizable by your designated System Administrator. See [Adding and editing codes](#) to learn more.

This screenshot shows a similar view to the first one, but with a different primary party selected. The left table shows 'Jordan, James' as the 'Primary Party Name' and 'Defendant' as the 'Type'. The right table shows 'Allan, Carol' as the 'Related Party Name' and 'Attorney' as the 'Relationship'. The rest of the interface, including the tabs, buttons, and input fields, remains the same.

To add Complainants and Respondents to a case, the System Administrator would first create a "Complainant" and "Respondent" **Party Type** in the **Litigation** section of the **System Management** module. A user would then be able to go to the **Parties** section of a case and add contacts, designating those contacts as Complainants or Respondents.

Other types of parties, such as Defendants, Mediators, Investigators, etc. are added in the same way as a Primary Party. Opposing Counsel should be added as a Related Party to a Primary Party.



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Cross-referencing a matter




Aaron Jones

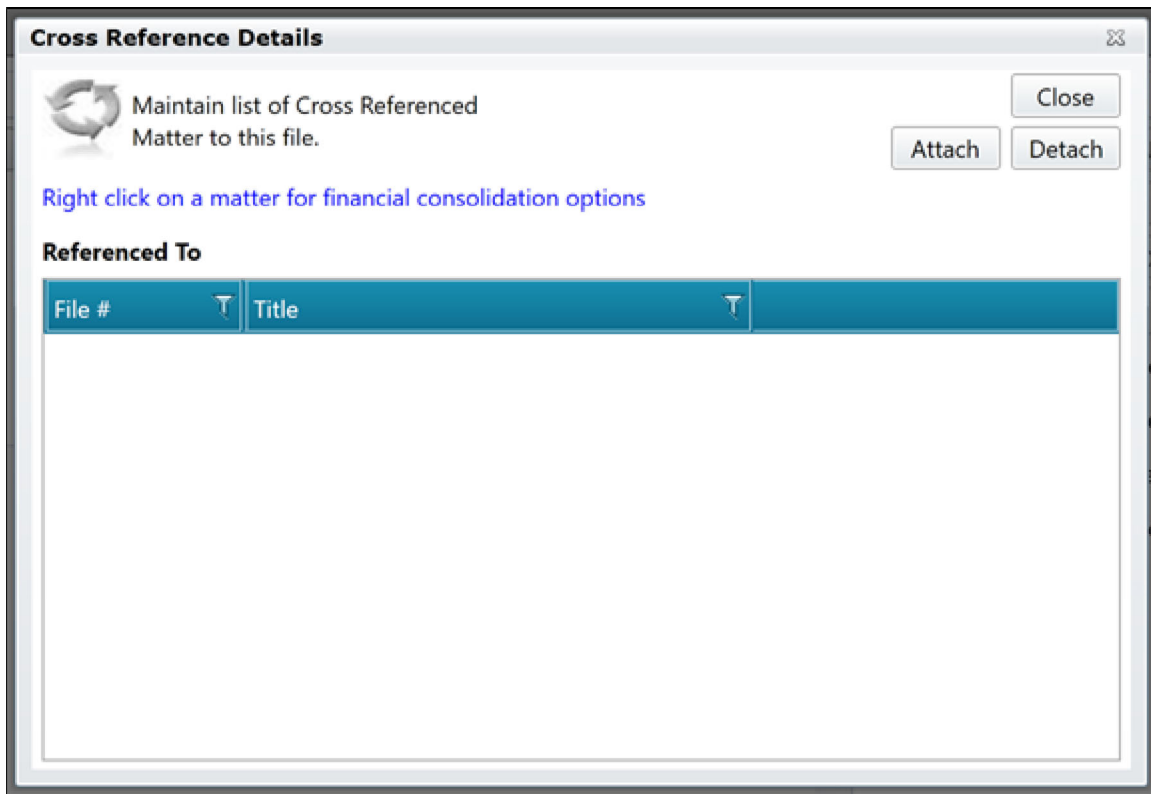
9 months ago · Updated

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The Basic tab of a matter allows the user to manage cross references. Press the ellipsis button to the right of the **Cross Ref** field.

Cross Ref 

The **Cross Reference Details** window will open, displaying a list of the cross-referenced matters, if any.



Press the **Attach** button to add a matter to the list. At this point you may also select data to import from the cross-referenced matter to the current matter. This is useful for consolidating matters.

Select a Matter

File # Title Search

Begin With Contains

Mod	File No.	Title	Department
-----	----------	-------	------------

Select Import Data

Title Location Evaluation Incident Date
 Parties Abstract Short Description Equipment
 Dept Cause Code Acct Court#
 Attorney Team Type Category

The fields which are available for import are module-specific.

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Find a Matter



Julie Stoltz

9 days ago · Updated

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There are several ways to locate a matter in **CityLaw/CountyLaw**. The most efficient and effective method will depend on the information known about the matter.

Contents:

- [Search Descriptions](#)
- [Global Matter Search](#)
- [My Open Matters Search](#)
- [Module Search](#)

Search Descriptions

Global Matter Search

This method searches through all matters in all modules. This is the broadest search possible and returns all matters accessible to the user fitting the provided search criteria.

My Open Matters Search

This method searches through the user's open matters. This is typically the most efficient search for a user to locate matters assigned to them.

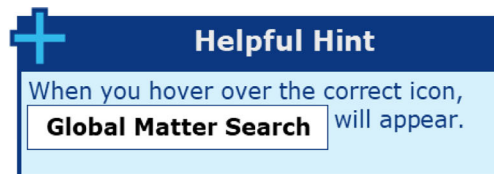
Module Search

This method searches through all matters within a specific module. This is similar to a **Global Matter Search**, except it only searches within the given module.

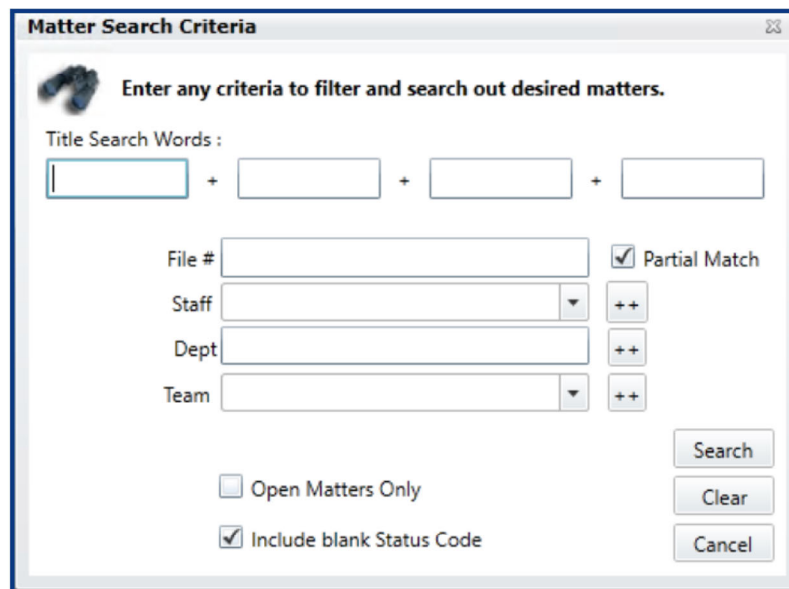
Global Matter Search

In the **Global Toolbar**, press the **Global Matter Search** icon.





In the **Matter Search Criteria** window, fill in information to narrow the search. Enter any of the following: one or more words in the **Title**; the **File #**; the assigned **Staff**; the associated **Department**; and/or the assigned **Team**. To limit the search to only open matters, check the **Open Matters Only** box.

A screenshot of the "Matter Search Criteria" window. The window title is "Matter Search Criteria" and it has a close button in the top right corner. Inside the window, there is a magnifying glass icon and the instruction "Enter any criteria to filter and search out desired matters." Below this, there are several input fields: "Title Search Words:" followed by four empty text boxes separated by plus signs; "File #" followed by an empty text box and a checked "Partial Match" checkbox; "Staff" followed by a dropdown menu and a "++" button; "Dept" followed by an empty text box and a "++" button; and "Team" followed by a dropdown menu and a "++" button. At the bottom left, there are two checkboxes: "Open Matters Only" (unchecked) and "Include blank Status Code" (checked). At the bottom right, there are three buttons: "Search", "Clear", and "Cancel".

Press **Search**. The **Search** button is located in the bottom-right of the **Matter Search Criteria** window.

Matter Search Criteria

Enter any criteria to filter and search out desired matters.

Title Search Words : + + +

File # Partial Match

Staff ++

Dept ++

Team ++

Open Matters Only

Include blank Status Code

Search Clear Cancel

Search results appear in a **Search Result** window. If the results list is long, it can be further sorted by selecting any of the column headings. Double-click the desired matter.

Search Result

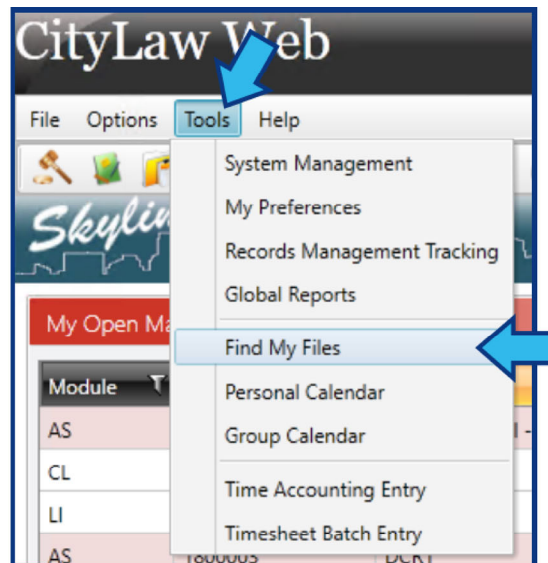
Date Sort

Staff	Module	File #	Title	Date	Dept
CESTR	LI	15-0002	Engle, C. vs City of LA	2/5/2015	
PDS	LI	15-0012	City of Denver v Joe Montana	5/12/2015	ALL
DGL	LI	16-0055	Johns Hopkins vs City of Richmond	12/8/2016	HHS
ATT	LI	17-0001	Jamieson v. City of Mobile	1/12/2017	MOPD
PDS	LI	18-0023	Jackson v. City of Somerville	10/31/2017	ARL
PDS	LI	18-0045	Lefever, Aaron v. City of Richmond	1/16/2018	PD
PDS	LI	18-0046	Jamieson, David v. City of Penticton	1/18/2018	
PDS	CL	C17-036	City dump truck ran over mail box	7/14/2017	
JH	CM	CO0016	City of Richmond, KY		
CGSTR	AS	CR-3827	Norwalk wants to run CityLaw/Filedesk	3/27/2009	NOR
CESTR	AS	CR-4903	Reports needed for City Council request	5/17/2010	NPB
BJX	AS	CR-5084	Global CityLaw Toolbar ribbon displayed	7/30/2010	OAK

Double-Click on a file to retrieve it.

Print Close

Alternatively, a sortable list of matters can be accessed. Press **Tools** in the **Menu Bar** and select **Find My Files**.



A **Global Matter Search Results** window appears. The list can be sorted by pressing any of the column headings.

Global Matter Search Results (10)

Include blank status code Date Sort

Staff	Module	File #	Title	Date	Dept	
SAB	LI	16-0057	Jones, Bob v. City of Richm	7/10/2018	PW	
SAB	LI	18-0001	Stratmore v. City of Berea	7/2/2018	PW	
SAB	LI	18-0003	Complaint 1	8/31/2018	PW	
SAB	AS	1800001	Animal Control - Leash Lav	7/30/2018	PW	
SAB	AS	1800003	DCR1	8/31/2018	PW	
SAB	AS	1900001	John Doe vs City Dog Poun	1/16/2019	PD	
SAB	CL	C17-001	Claim	4/18/2017	PD	
DEMO	CM	CO0002	Test Contract with ABC Co		PD	
SMA	AS	CR16-0062	Memorial Union Terrace -	6/21/2018	PW;PW OPS	
SAB	PR	PR19-0001	Doe, John	1/25/2019		

Double-Click on a file to retrieve it. Print Close

In this example, the list is sorted alphabetically by **Title**. Notice the **Title** heading is colored differently to show it is the column by which the list is sorted.

Global Matter Search Results (10)

Include blank status code Date Sort

Staff	Module	File #	Title	Date	Dept
SAB	AS	1800001	Animal Control - Leash Lav	7/30/2018	PW
SAB	CL	C17-001	Claim	4/18/2017	PD

Each column is filtered according to a numerical or alphabetical default appropriate to the category. Pressing the **Filter** icon will open a window that allows more filtering options.

Global Matter Search Results (10)

Include blank status code Date Sort

Staff	Module	File #	Title	Date	Dept
SAB	AS	1800001	Animal Control - Leash Lav	7/30/2018	PW
SAB	CL	C17-001	Claim	4/18/2017	PD

As an example, to see a list of all open **Assignment** matters, check the box for the **AS** module.

Global Matter Search Results (10)

Include blank status code Date Sort

Staff	Module	File #	Title	Date	Dept
SAB	AS		Animal Control - Leash Lav	7/30/2018	PW
SAB	CL			4/18/2017	PD
SAB	LI			8/31/2018	PW
SAB	AS			8/31/2018	PW
SAB	PR			1/25/2019	
SAB	AS		City Dog Poun	1/16/2019	PD
SAB	LI		City of Richr	7/10/2018	PW
SMA	AS		on Terrace -	6/21/2018	PW;PW OPS
SAB	LI		City of Berea	7/2/2018	PW
DEMO	CM		with ABC Co		PD

Select All

AS

CL

CM

LI

PR

Show rows with value that

Contains

And

Contains

Filter Clear Filter

Double-Click on a file to retrieve it.

Print Close

My Open Matters Search

If in **Skyline View** or **Mainstreet View**, and **My Open Matters** is set to display, a sortable list of open matters is visible.

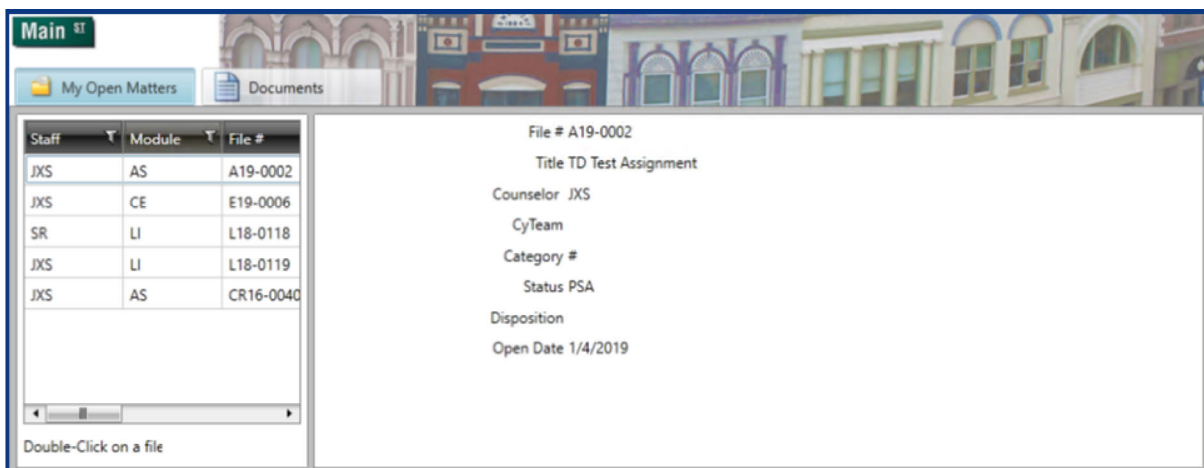
Skyline View



The screenshot shows the 'Skyline' interface with a header 'My Open Matters (10) - Showing 10.' Below the header is a table with the following data:

Module	File #	Title	Date	Dept	Attorney
AS	1800001	Animal Control - Leash Law	7/30/2018	PW	SAB
CL	C17-001	Claim	4/18/2017	PD	SAB
LI	18-0003	Complaint 1	8/31/2018	PW	SAB
AS	1800003	DCR1	8/31/2018	PW	SAB
PR	PR19-0001	Doe, John	1/25/2019		SAB
AS	1900001	John Doe vs City Dog Pound	1/16/2019	PD	SAB
LI	16-0057	Jones, Bob v. City of Richmond	7/10/2018	PW	SAB
AS	CR16-0062	Memorial Union Terrace - nutrient poll	6/21/2018	PW;PW OPS	SMA
LI	18-0001	Stratmore v. City of Berea	7/2/2018	PW	SAB

Mainstreet View



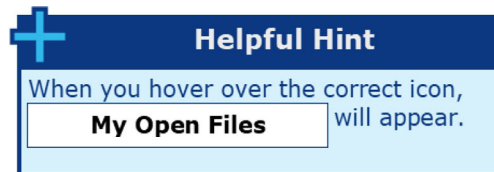
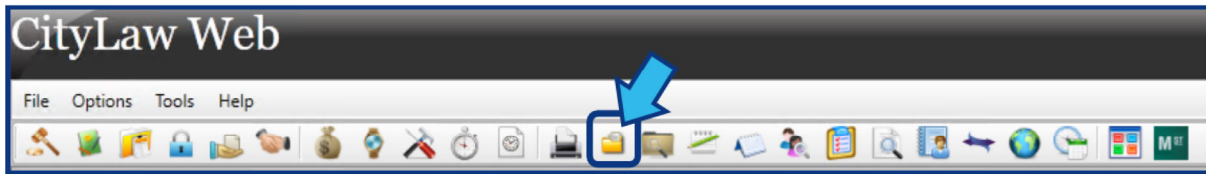
The screenshot shows the 'Mainstreet' interface. On the left, there is a table of open matters:

Staff	Module	File #
JXS	AS	A19-0002
JXS	CE	E19-0006
SR	LI	L18-0118
JXS	LI	L18-0119
JXS	AS	CR16-0040

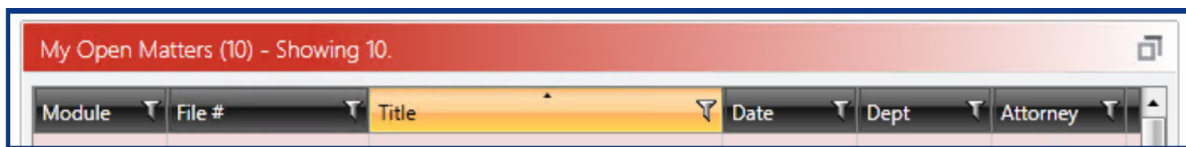
On the right, the details for File # A19-0002 are displayed:

- File # A19-0002
- Title TD Test Assignment
- Counselor JXS
- CyTeam
- Category #
- Status PSA
- Disposition
- Open Date 1/4/2019

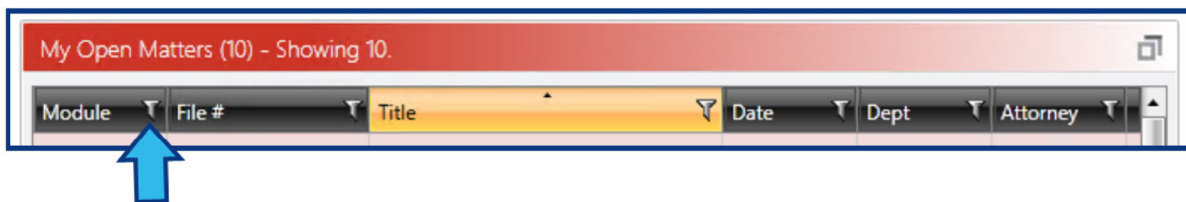
Open matters can also be viewed by pressing the **My Open Files** icon in the **Global Toolbar**.



The list in either case can be sorted by pressing any of the column headings. In this example, the list is sorted alphabetically by **Title**. Notice the **Title** heading is colored differently to show it is the column by which the list is sorted.



Each column is filtered according to a numerical or alphabetical default appropriate to the category. Pressing the **Filter** icon will open a window that allows more filtering options.



As an example, to see a list of all open **Assignment** matters, check the box for the **AS** module.

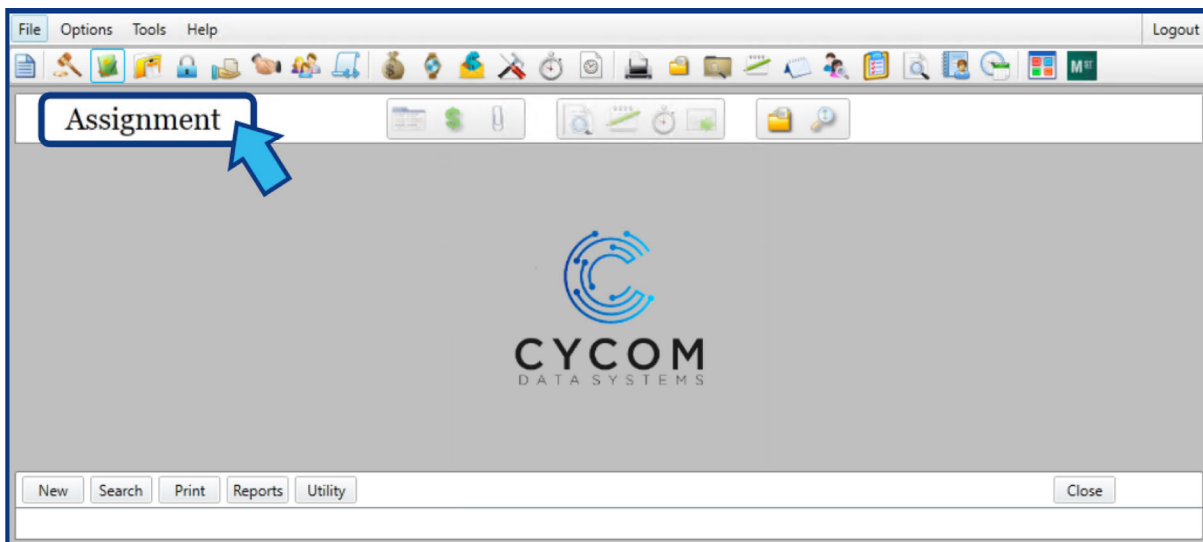
My Open Matters (10) - Showing 10.

Module	File #	Title	Date	Dept	Attorney
AS		Control - Leash Law	7/30/2018	PW	SAB
CL			4/18/2017	PD	SAB
LI	1		8/31/2018	PW	SAB
AS			8/31/2018	PW	SAB
PR			1/25/2019		SAB
AS		vs City Dog Pound	1/16/2019	PD	SAB
LI		v. City of Richmond	7/10/2018	PW	SAB
AS		Union Terrace - nutrient poll	6/21/2018	PW;PW OPS	SMA
LI		v. City of Berea	7/2/2018	PW	SAB
CM		act with ABC Company for B		PD	DEMO

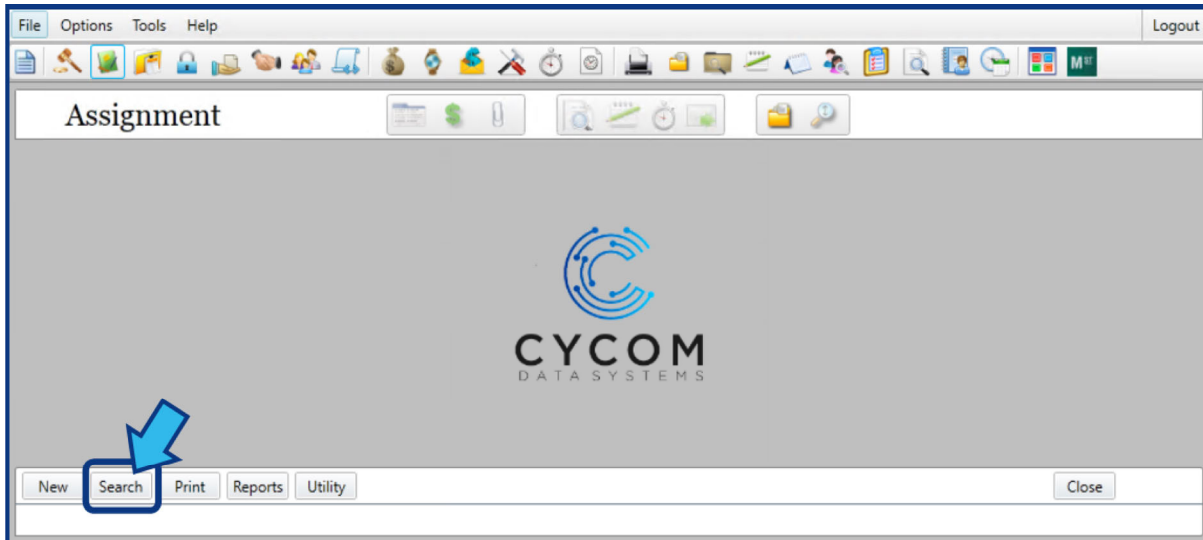
My Email

Module Search

Open the module that matches the type of the matter to be found. When in the correct module, the module type name appears on the **Module Toolbar**, as shown below. In this guide, the example matter to be found is an **Assignment**, but the same process works for all matter types.



Press **Search**. The **Search** button is located in the bottom-left corner of the module window.



In the **Search Criteria** window, fill in the information known to narrow the search and then press **Search**. If all fields are left blank, the results will show all matters of the chosen module type.

Assignment Search Criteria

Enter any criteria to filter and search out desired Assignment files.

Search selection

Search words
 [] + [] + [] + [] + [] + []
 or
 [] + [] + [] + [] + [] + []
 or
 [] or [] or [] or [] or [] or []

Found in : Title Description Status Desc Disposition Notes
 Keywords Notes Contact Name Location Location Code

Search Type
 Contains Begins with

File # [] **Attorney** [] ++
 1st Atty 2nd Atty

Lookup Dates
 Empty From To
 Received [] [] []
 Target [] [] []
 Complete [] [] []

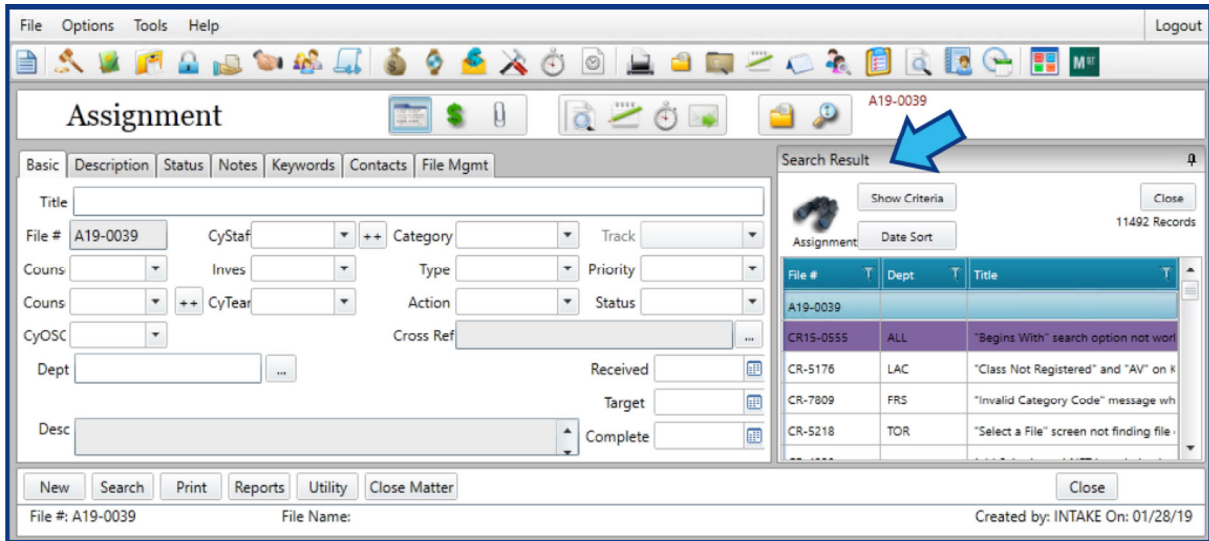
Cat [] ++
Type [] ++
Subject [] ++
Status [] ++
Dept [] ++
Fund [] ++

JS Counsel [] ++
Staff [] ++
Inves [] ++
Team [] ++
Priority [] ++
Dispo [] ++
Action [] ++

Include History

Search

Select the desired matter from the **Search Result** window.



The screenshot shows the 'Assignment' window with a search result for file # A19-0039. A blue arrow points to the 'Search Result' tab, which displays a table of search results. The table has columns for File #, Dept, and Title. The first row is highlighted in blue and contains the file # A19-0039. Other rows include CR15-0555, CR-5176, CR-7809, and CR-5218.

File #	Dept	Title
A19-0039		
CR15-0555	ALL	"Begins With" search option not wor
CR-5176	LAC	"Class Not Registered" and "AV" on k
CR-7809	FRS	"Invalid Category Code" message wh
CR-5218	TOR	"Select a File" screen not finding file

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Dashboards: Skyline & Main Street



Aaron Jones

 1 year ago · Updated

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Dashboard Customization

After logging in, either the Skyline or Main Street dashboard are visible. Skyline is the default dashboard, but this can be changed to Main Street from User Preferences.

The screenshot shows the CityLaw Web - SHL application interface. The 'Tools' menu is open, and 'My Preferences' is highlighted. The interface includes a 'My Open Matters' list on the left, a 'My Documents' table in the center, and a 'My Email' table on the right.

Date	File #	Matter Title	Title
7/20/2015	CR-9774	Training Request for	ADVISORY ASSIGNMENT M
7/20/2015	CR15-0177	Create Templates for	Administrative Appeal Deci
7/6/2015	CR15-0177	Create Templates for	Cover Ltr Response - BOE-f
5/27/2015	CR15-0177	Create Templates for	Cover Ltr Response - No Re
7/6/2015	CR15-0177	Create Templates for	Cover Ltr Response - Individ

File #	Matter Title	Subject
TEST003	Test from Bob	CR-8108 - CountyLaw - get Com
TEST003	Test from Bob	You are the first contact added t
CR15-0695	Create Templates - W	FW: Slight changes to forms
CR15-0696	Create Templates - Er	FW: Another template
CR15-0696	Create Templates - Er	FW: Revised Template

In the **Tools** menu, select **My Preferences** to open the My Preferences window.

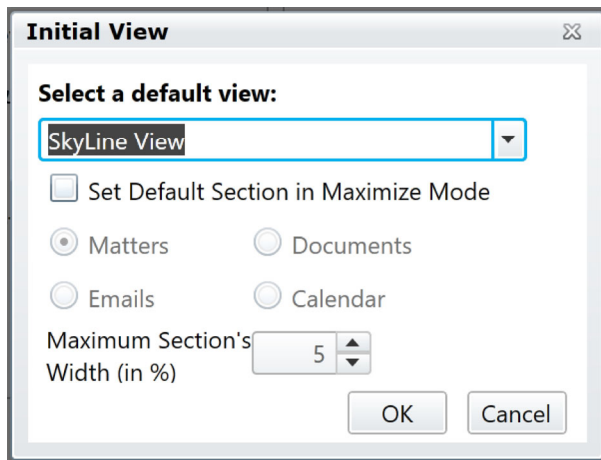
The 'My Preferences' window is shown with two columns of settings, each with an unchecked checkbox:

- Skyline Settings**
 - Initial View
 - Skyline & Main St. View Settings
 - Attorney Preference
 - Team Preference
- Other Settings**
 - Set My Logon Password
 - Configure Email Account
 - Default Personal Template Path
 - Display Time Zone in Assignment-Make Entry
 - Set calendar settings

A 'Close' button is located at the bottom right of the window.

Initial View

Press the **Initial View** button to open the Initial View window.



Use the drop-down box below "Select a default view" to specify the dashboard which will display upon login. The options are:

1. **Skyline:** This is the default dashboard. It displays lists of your current and recent data in a grid view.
2. **Main Street:** This dashboard separates your current and recent data into tabs, and features a large Document Preview panel.
3. **None:** Select this option to display only the Global Toolbar upon login.

If Skyline is selected as the default view in the drop-down box, additional options are visible in the window. You can specify whether one section is maximized by default after login, and which section it should be. You can also specify how large the maximized section should be as a percentage of your screen width.

Skyline

Skyline can display four different types of data:

My Open Matters

These are the open matters of the currently logged in user. Administrators or team leaders also have the option of viewing the open matters of specific attorneys or an entire team from this section in Skyline.

My Documents

This section displays a list of recently created or edited documents.

My Email

This section displays a list of email messages which have been sent from CityLaw/CountyLaw within the timeframe specified in User Preferences.

My Calendar

This section displays upcoming calendar events for which the logged in user is an attendee or staff.

Main Street

Main Street can display the same data sections as Skyline:

1. Open Matters
2. Documents
3. Email
4. Calendar

Main Street organizes your data into four tabbed sections. Select a tab to view a list of that data next to a document preview panel. Select an item in the list to preview it.

The screenshot displays the CityLaw Web application. On the left, a document list table is visible with columns for File #, Matter title, Title, Modified, CyDept, Ext, and P. The right pane shows a 'DIVISION MANAGEMENT REPORT' for the period 04/01/2016 to 06/30/2016. The report includes sections for Open Cases, Resolved Cases, and Active Cases, along with a detailed table for resolved cases.

Name of Attorney : Text Attorney One	Number of cases resolved this quarter: 1						
Name of Case	Court #	Client Department	Category	Case	Disposition Date	Disposition	Award/settled amount(\$ amt)
City of LA v. Torres, Francisco & Mary	12345	Los Angeles	text		04/01/2016	For Defense	

View Settings

From the **My Preferences** window (**Tools > My Preferences**), select the **Skyline & Main St. View Settings** button.

The 'My Preferences' window is shown with two main sections: 'Skyline Settings' and 'Other Settings'. Each section contains several options with checkboxes.

Skyline Settings

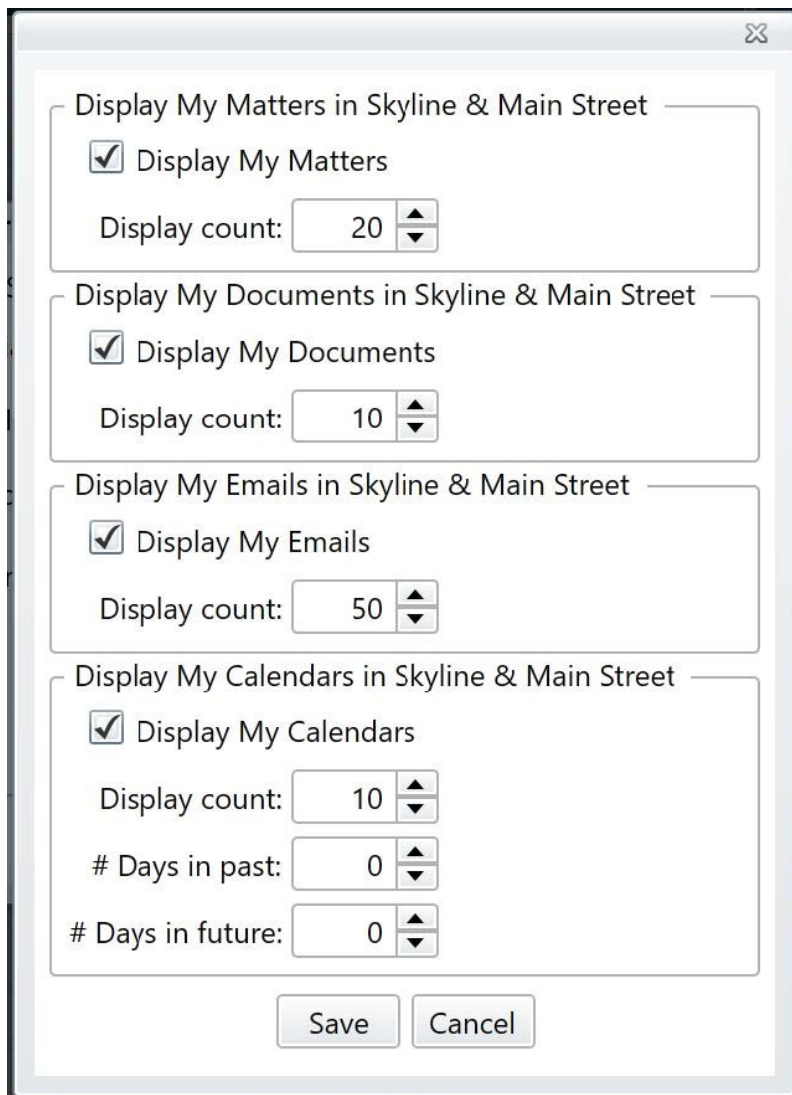
- Initial View
- Skyline & Main St. View Settings
- Attorney Preference
- Team Preference

Other Settings

- Set My Logon Password
- Configure Email Account
- Default Personal Template Path
- Display Time Zone in Assignment-Make Entry
- Set calendar settings

A 'Close' button is located at the bottom right of the window.

The **View Settings** window opens.



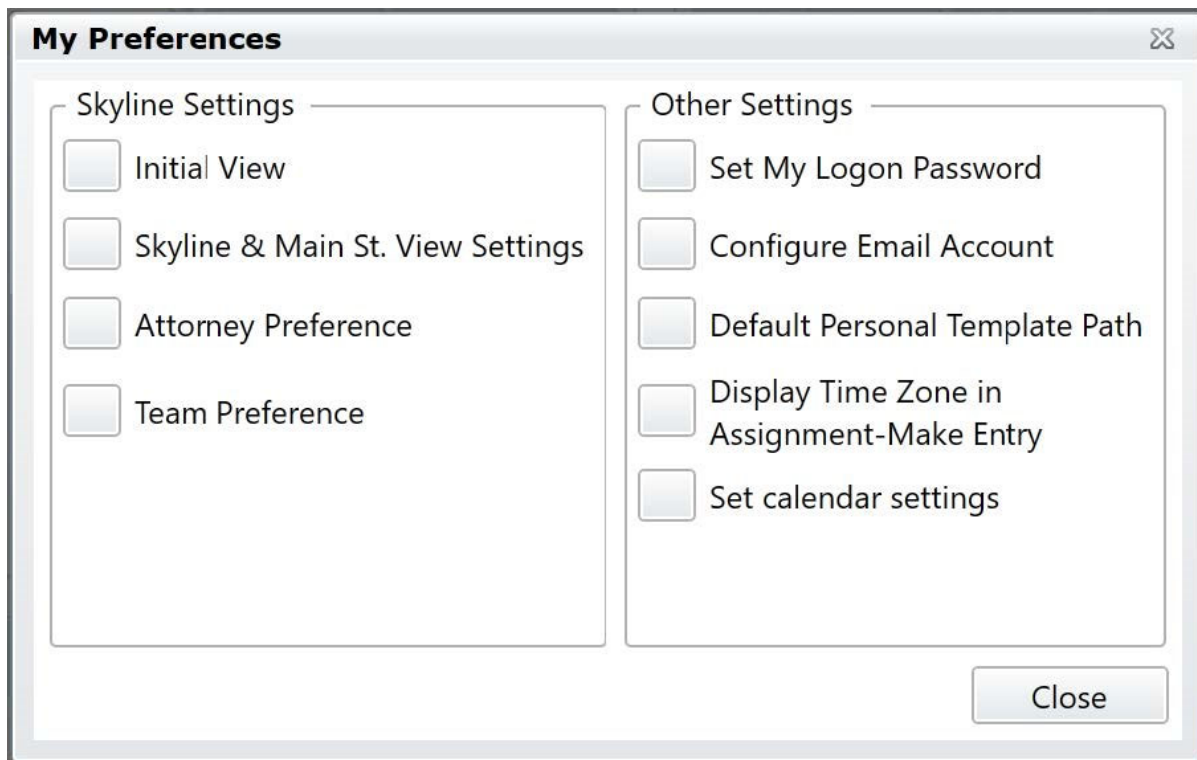
The screenshot shows a preferences window titled "Display My Matters in Skyline & Main Street". It contains four sections, each with a checked checkbox and a "Display count" spinner. The first section is "Display My Matters" with a count of 20. The second is "Display My Documents" with a count of 10. The third is "Display My Emails" with a count of 50. The fourth is "Display My Calendars" with a count of 10, and two additional spinners for "# Days in past" and "# Days in future", both set to 0. At the bottom are "Save" and "Cancel" buttons.

Section	Display Count	# Days in Past	# Days in Future
Display My Matters	20		
Display My Documents	10		
Display My Emails	50		
Display My Calendars	10	0	0

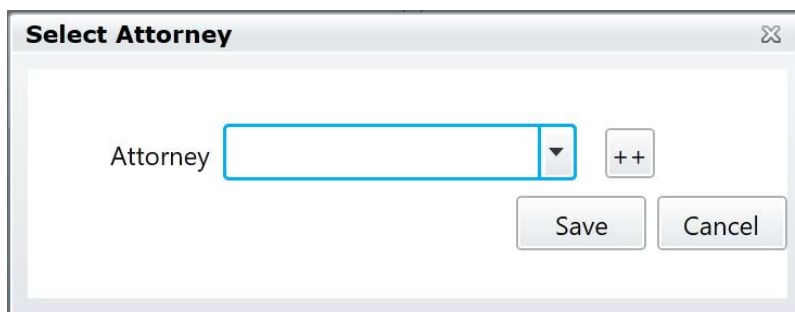
From this window, you can specify which sections are visible in the dashboards. You can also specify how many items to display in each section. In addition to the item count, the Calendar section allows you to specify how many days into the past and future to look for calendar events when populating the list.

Attorney Preference

From the **My Preferences** window (**Tools > My Preferences**), select the **Skyline & Main St. Attorney Preference** button.



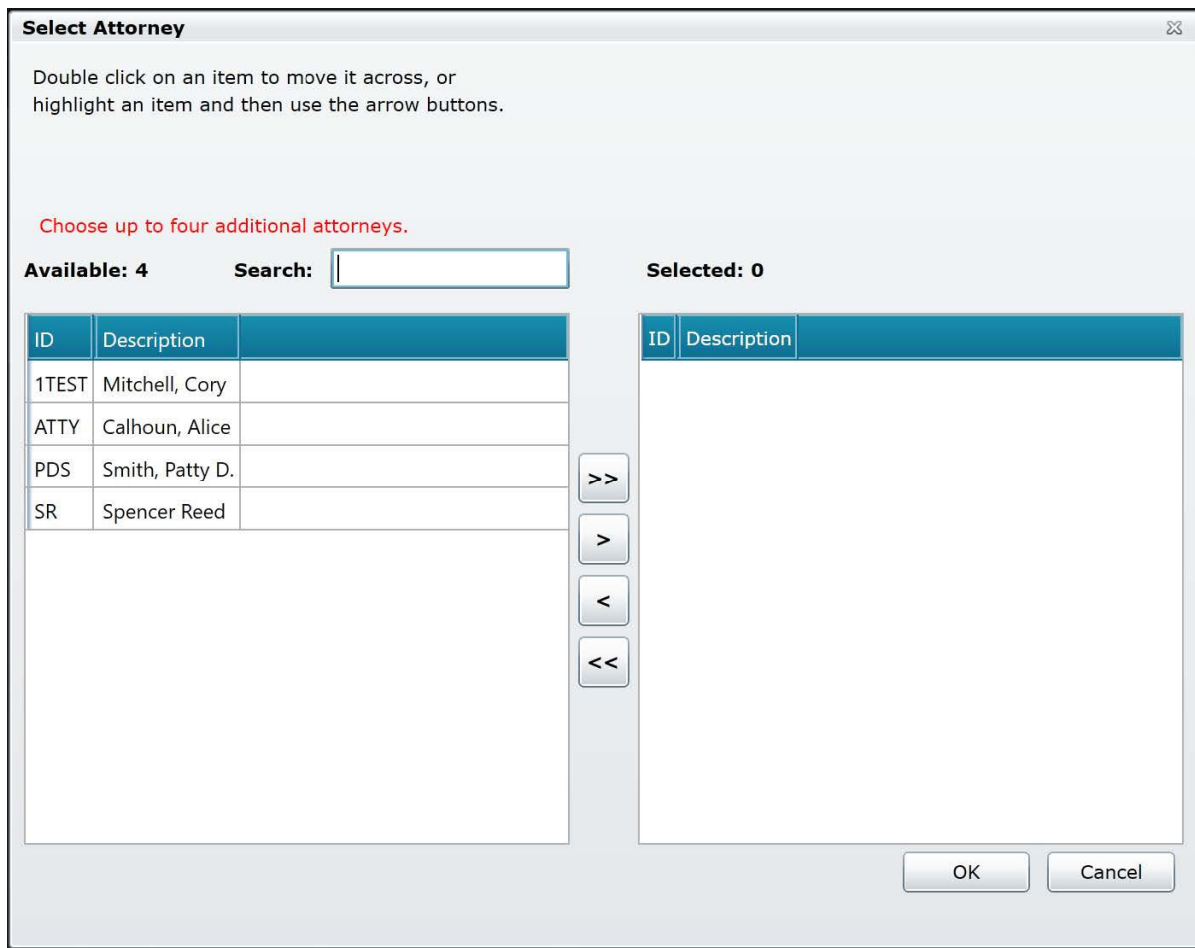
The **Attorney Preference** window opens.



To view the open matters of a particular Attorney in the **Open Matters** section, select that Attorney's name from the drop-down box.

To view the **Open Matters** of multiple Attorneys, select the **Multi-Select** button ("++").

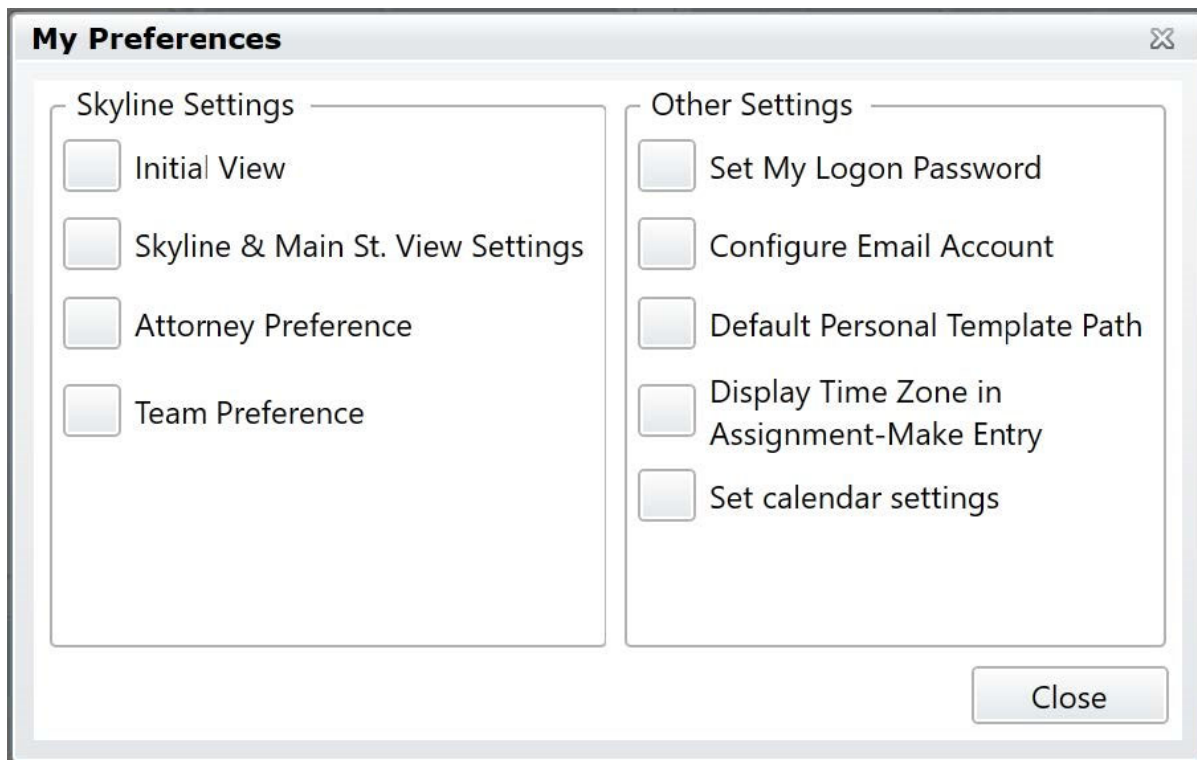
The **Attorney Multi-Select** window appears.



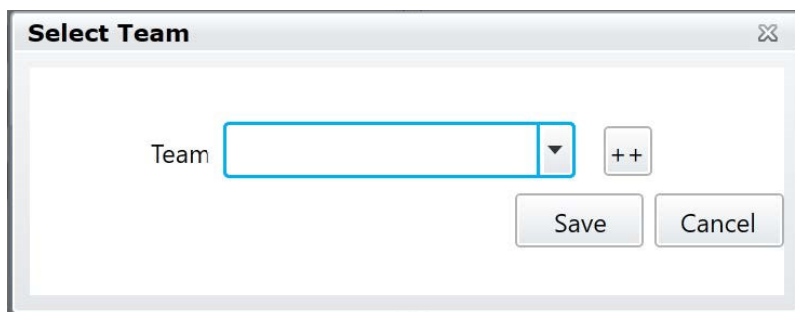
Use the arrow buttons (">>", ">", "<<", "<") to move **Attorneys** from one list to the other. When all the **Attorneys** you wish to select are in the right-hand list, select **OK** to save and close the window.

Team Preference

From the **My Preferences** window (**Tools > My Preferences**), select the **Skyline & Main St. Team Preference** button.

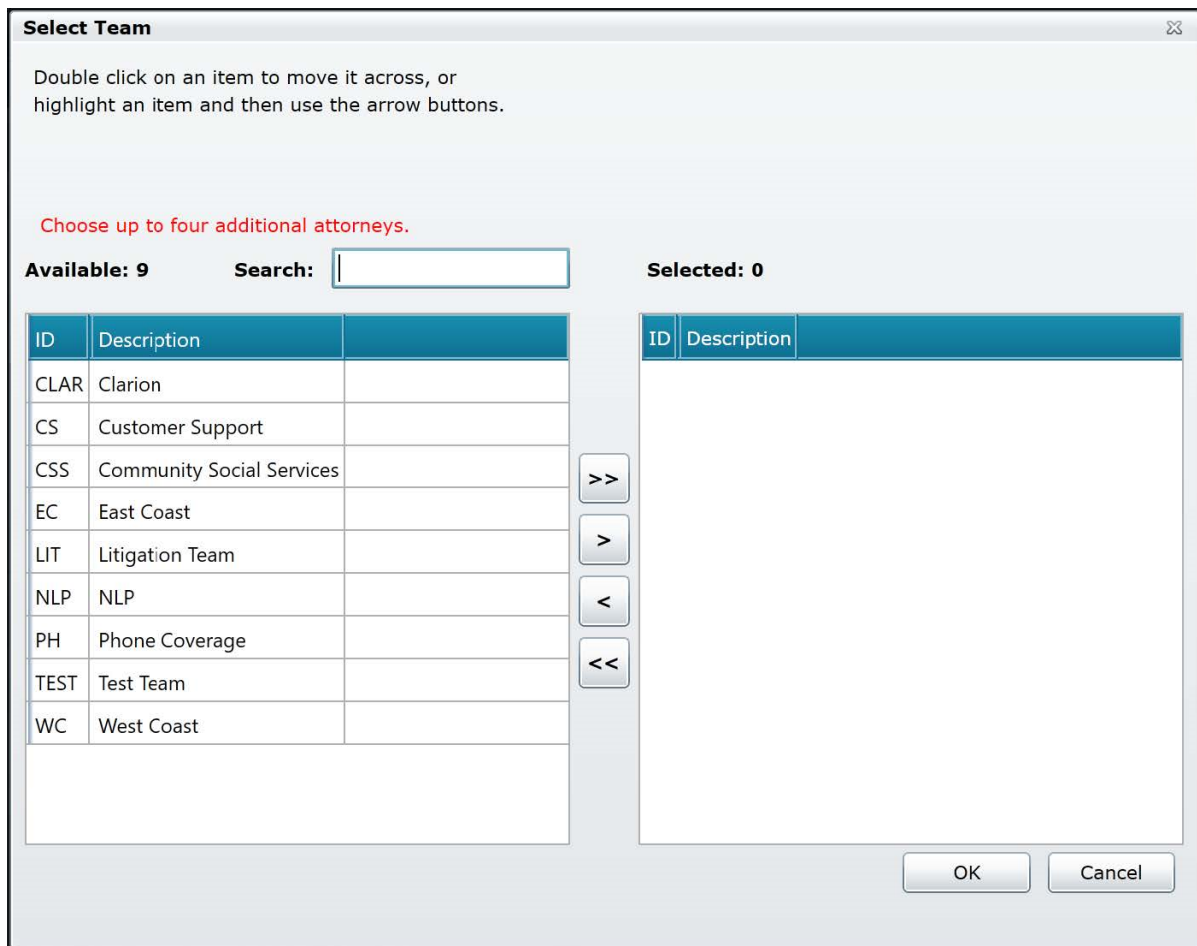


The **Team Preference** window opens.



To view the open matters of a particular Team in the **Open Matters** section, select that Team's name from the drop-down box.

To view the **Open Matters** of multiple Teams, select the **Multi-Select** button ("++").

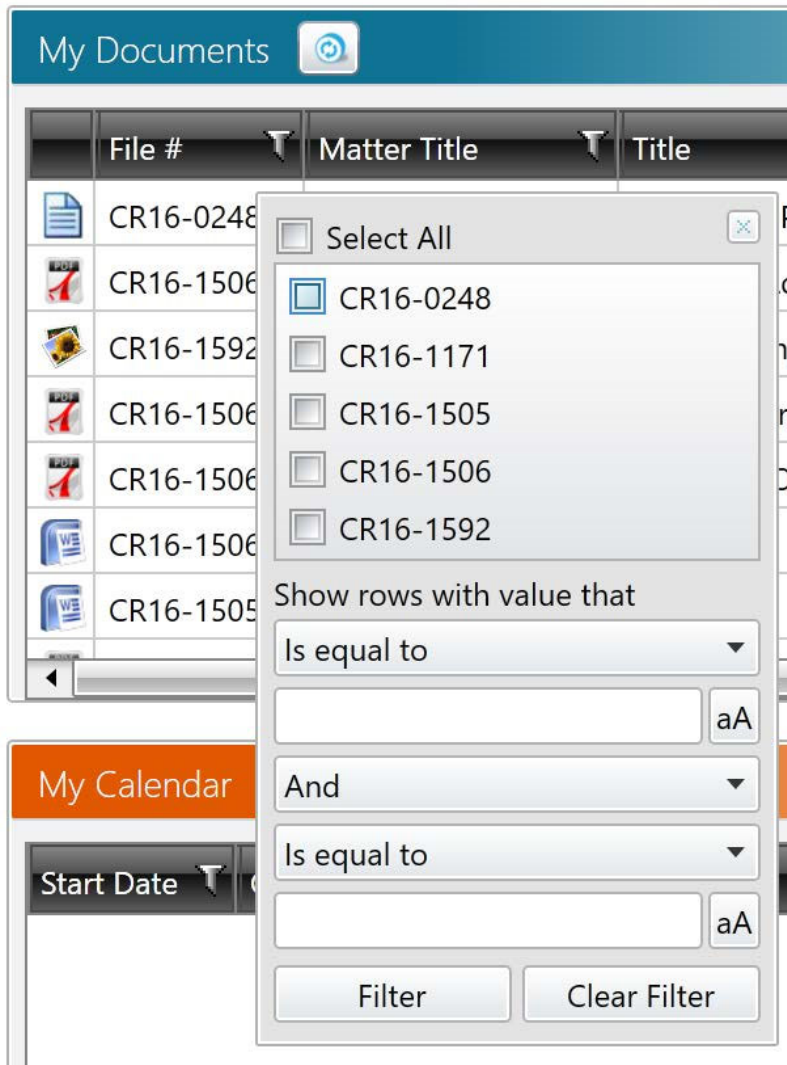


Use the arrow buttons ("**>>**", "**>**", "**<**", "**<<**") to move **Teams** from one list to the other. When all the **Teams** you wish to select are in the right-hand list, select **OK** to save and close the window.

Filtering Dashboard Sections

To filter the data in any grid, select the **Filter** button (in the shape of a funnel) at the right-hand side of a column in the grid.

The **Filter Menu** appears.



Select the **Filter** button to apply your filter and show only those items matching the specified criteria, or select the **Clear Filter** button to erase any applied filtering and show all items in the grid.

Accessing Files

There are several ways to access files. If the desired file is visible in a grid on your dashboard, double-click the file to open it. This works in both the **Documents** and **Email** sections of Skyline and Main Street. Double-click a matter in the **Open Matters** section to be taken to the Basic Screen of that matter in its respective Module, and double-click a calendar event to be taken to the Calendar.

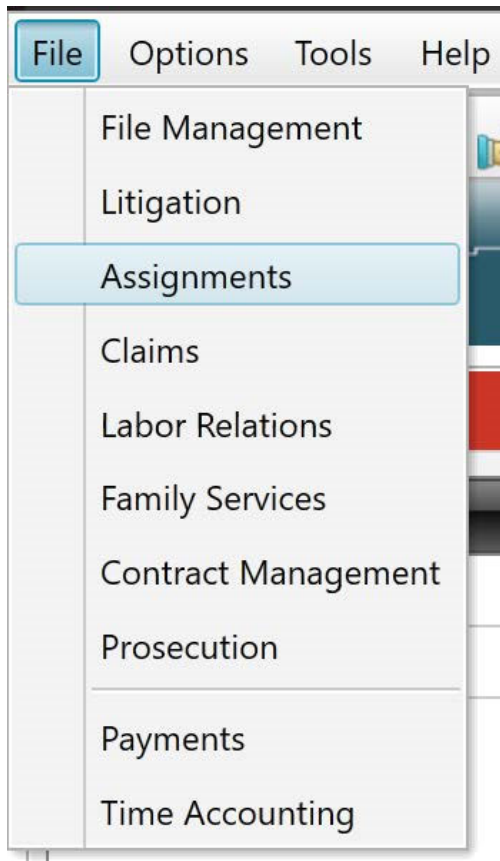
The screenshot displays the Skyline software interface with a menu bar (File, Options, Tools, Help, Logout) and a toolbar. The main area is divided into four panels:

- My Open Matters:** A table listing open matters with columns for Module, File #, Title, Date, and Dept. The row for File # A16-0956 is highlighted.
- My Documents:** A table listing documents with columns for File #, Matter Title, Title, Modified, Dept, and Ext.
- My Calendar:** A table listing calendar events with columns for Start Date, Class, and Subject.
- My Email:** A table listing email messages with columns for File #, Matter Title, Subject, Sent, and Dept.

Files can also be accessed by searching a Module. There are two ways to open a Module. The first is by selecting its icon in the **Global Toolbar**:



The second is by selecting the Module's name from the **File Menu**:



Was this article helpful?

0 out of 0 found this helpful

Have more questions? [Submit a request](#)

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Green Lake County
Document Category Listing

Code	Description
AFDS	Affidavit of Service
ATTYNOTE	Attorney handwritten notes
CON	Contract / Agreement
CTNOT	Court Notice
DEED	Deed or other Conveyance
DISC-A	Discovery Answer
DISC-R	Discovery Request
DRREPT	Doctor Examination/Report
EMAIL	Email
EXB	Exhibit
FAX	Fax cover / fax sheet
FORM	Forms
GALRPT	Guardian ad Litem Report
GDNLET	Letters of Guardianship
GI	Graphic Image/Picture
IMG	Image
LET	Letter
MAP	Maps including GIS
MEMO	Memorandum
OPN	Opinion
ORD	Ordinance
ORDER	Court Order
ORR	Open Record Request Response
PLEAD	Pleading
PLT	Plat
POL	Policy
PPT	PowerPoint Presentaion
RCH	Research
REP	Report
RES	Resolution
SPD	Spreadsheet
TRANS	Transcript of Court Hearing
TRIALPRE	Trial Preparation materials
WITQ	Witness Questions

**Green Lake County
Document Types Listing**

Code	Description
ADMIN	Administrative Code
CASEL	Case Law
CTFILED	Court Filed Copy
DRAFT	Draft
FAX	Faxes in or out
FINAL	Final
IMPORT	Import
OAG	Attorney General Opinion
RESTAT	Restatement of Law
SENT	Sent
SI	Scanned Image
STAT	Statute
TREAT	Treatise
VO	Vendor Original
XLS	Excel spreadsheet

GREEN LAKE COUNTY PERSONAL INFORMATION DATA BREACH RESPONSE PLAN

Introduction & Authority

Wisconsin Statute §134.98 requires certain entities to notify subjects if personal information stored by the entity has been acquired by a person whom the entity has not authorized to do so. A County is considered an entity for purposes of the statute; therefore, this policy is designed to comply with the statute and industry practices for responding to a data breach.

Definitions

Breach means acquisition of personal information in the County's possession by a person whom the County has not authorized to acquire the personal information.

Name means an individual's last name combined with the individual's first name or first initial.

Personal information means an individual's name in combination with and linked to any of the following elements, if the element is not publically available information and is not encrypted, redacted, or altered in a manner that renders the element unreadable. The individual's

- (a) social security number,
- (b) driver's license number or state identification number,
- (c) a financial account number, including a credit or debit card account number, or any security code, access code, or password that would permit access to the individual's financial account,
- (d) their DNA (deoxyribonucleic acid profile) as defined in s. 939.74(2d)(a),
- (e) their unique biometric data, including fingerprint, voice print, retina or iris image, or any other unique physical representation.

Publicly available information means any information that an entity believes is one of the following which is

- (a) lawfully made widely available through any media,
- (b) lawfully made available to the general public from federal, state, or local government records or disclosures to the general public that are required to be made by federal, state, or local law.

Security breach means an unauthorized acquisition of data that compromises the security, confidentiality or integrity of personal information maintained by Green Lake County. Good faith acquisition of personal information by an employee or agent of Green Lake County for

business purposes is not a breach, if the personal information is not used or subject to further unauthorized disclosure.

Data Breach

Data breaches occur when personal information, as defined above, is stolen, accessed or used without authorization. Breaches can occur when an employee or a contractor is negligent, disgruntled or dishonest and use the confidential data improperly. Improper destruction of records containing personal information can also be a cause for a data breach. Another source of breach is by cybercriminals, e.g. hackers, organized crime, etc., seeking profit or for political reasons. Obtaining personal information for business functions is not a breach if the information is not improperly disclosed.

Employee responsibility

Once a data breach is known, employees must take the following steps:

1. At discovery all County employees must report a suspected or confirmed breach of personal information on individuals which the County retains personal information on. This would include notification received from any third-party service providers or other business partners with whom the County does business and shares personal information on individuals.
2. The employee who becomes aware of a data breach shall, to the best of their ability, do the following:
 - Note the date, time, duration and location of the breach
 - Note how the breach was discovered, by whom and any other known details.
 - Note the data that was compromised, including the individual(s) affected, the type of data, how many records may have been affected and what that data refers to.
3. Employees should report the suspected or confirmed breach to their immediate supervisor who will notify the County Administrator.
4. The employee who discovers and reports the suspected data breach shall assist with the investigation, preserving any evidence of the breach and provide assistance to the Incident Response Team as required.

Incident Response Team (IRT)

An Incident Response Team (IRT) is established to provide a quick, effective and orderly response to computer related incidents such as, improper disclosure of confidential information to others, breach of personal information, and other events with serious information security implications. The IRT is authorized to take appropriate steps deemed necessary to contain, mitigate or resolve a data breach involving personal information.¹

The Green Lake County Incident Response Team shall consist of:

- County Administrator
- IT Director
- Corporation Counsel
- County Board Chair
- Sheriff
- Emergency Management Director

Roles and Responsibilities of the IRT Team

- The County Administrator shall:
 - a. Identify the sequence of steps for communicating the news of the data breach.
 - b. Serve as the central coordinator for all communication efforts to ensure accuracy and consistency, e.g. by establishing and/or overseeing a website, consumer hotline or social media notifications
 - c. Track media coverage and devise a strategy to respond to any negative press.
 - d. Determine whether the County will provide fraud or credit monitoring services to the victims of the data breach.
 - e. Keep the County Board informed.
- The IT Director shall be the incident lead. The IT Director shall:
 - a. Coordinate communication with the members of the IRT.
 - b. Manage and coordinate the response efforts.
 - c. Identify key tasks and timelines and keep documentation of all response and mitigation efforts.
 - d. Develop a budget and identify resources required for the response.
 - e. Conduct a review to determine whether the response was effective and efficient and present to the IRT ideas for any adjustments to be made to this policy.
- The Corporation Counsel shall:
 - a. Determine how and when to notify the affected individuals, the media, law enforcement and government agencies, and other necessary parties after consulting with the County Board Chair and County Administrator.
 - b. Coordinate with outside counsel if necessary.

- c. Notify the County's insurance carrier to preserve insurance coverage for any lawsuits or claims against the County.
 - d. Serve as a resource for data breach notification requirements and other legal obligations under applicable federal and state laws.
 - e. Identify what aspects of the response and mitigation efforts should be protected by the attorney-client privilege.
 - f. Work with the team to determine the balance between needing to preserve evidence and the need to continue operations and how best to achieve that balance.
- The County Board Chair shall assist the County Administrator with media coverage and be the liaison between the media and the County Board.
 - The Sheriff shall:
 - a. Assist the team in determining whether information should be withheld during any investigation by the Office of Sheriff.
 - b. Determine if there were building security breaches that led to the data breach.
 - c. Assist the team with gathering evidence regarding the breach.
 - The Emergency Management Director shall assist the IT Director in determining, what type of incident has occurred, who is involved, what is the scope of the breach, what is the impact now and in the future, what can be done to contain the incident, what systems are affected and what is the effect on those systems, what actions have been and what actions should be taken, and make recommendations on how to handle the current and future breaches.

What to do in the event of a Data Breach

1. Secure operations

- a. Assemble a team of experts such as a data forensics team if necessary
- b. Consult with counsel:
 - 1. What statutes apply?
 - 2. Is there a litigation risk? Review vendor agreements, including website privacy policies to see if the County owes notification to others.
 - 3. Does our insurance cover the breach?
 - 4. Are we involved with any third party vendors which we may have an obligation to notify the vendor of the breach?
 - 5. Have any employees violated policies and are responsible for the breach?
 - 6. Do we need outside counsel to assist with the breach?
- c. Secure physical areas to ensure that persons who are not authorized to be in the area where the breach occurred cannot have access to County computer equipment.

- d. Stop additional data loss. IT Department will take all affected equipment offline immediately, but will not turn off any machines until forensic experts are retained and are on site. If possible, the IT Department will put clean machines online in the place of affected ones. If necessary, credentials and passwords of authorized users will be updated to avoid hackers using stolen credentials and passwords.
- e. Remove improperly posted information from the web. If the stolen personal information was on the County's website, it must be immediately removed. If necessary the IT Department or its designee will contact search engines to ensure that the stolen personal information is not archived.
- f. Interview people who discovered the breach. Employees reporting a suspected breach will assist in acquiring information, preserving evidence and providing additional assistance as determined by the IRT throughout the investigation.
- g. Do not destroy evidence. All evidence must be preserved for the forensic experts and potential litigation against the County.
- h. If credit cardholder data is involved, follow additional steps outlined under Appendix A. Bankcard companies, specifically Visa and MasterCard, have detailed requirements for reporting security incidents and the suspected or confirmed compromise of cardholder data. Reporting is typically required within 24 hours of compromise.ⁱⁱ See Appendix A.

2. *Fix Vulnerabilities*

- a. Do we need to contact service providers to see if what personal information they can access and determine if we need to change their access? If the service provider is part of the breach, have the service provider provide proof that its vulnerabilities have been fixed.
- b. Work with forensic experts to determine if there are changes that should be made to the network.

3. *Notify Appropriate Parties*

a. **Our legal requirements.**

- 1. If the acquisition of personal information **does not** create a material risk of identity theft or fraud to the subject of the personal information, state statute does not require the County to give notice to the person. Wis. Stat. §134.98(2)(cm)1.

- A. The following incidents may not require individual notification under contractual commitments or applicable laws and regulations provided that the County can reasonably conclude after investigation and within the time allowed to report under Wisconsin Statute §134.98(3) that the misuse of the information is unlikely to occur, and appropriate steps are taken to safeguard the interests of the affected personsⁱⁱⁱ.
- The County is able to retrieve personal information on an individual that was stolen, and based upon the County's investigation there is a reasonable belief that the retrieval took place before the information was copied, misused, or transferred to another person who could misuse it.
 - The County determines that personal information on an individual was improperly disposed of, but can establish that the information was not retrieved or used before it was properly destroyed.
 - A laptop computer is lost or stolen, but the data is encrypted and may only be accessed with a secure token or similar access device.
- B. If the acquisition of personal information creates a material risk of identity theft or fraud to the subject of the personal information, state statute requires the County to give notice to the person. Notice must be made within a reasonable time, not to exceed 45 days after the County learns of the acquisition of personal information. A determination of reasonableness shall include consideration of the number of notices that the County must provide and the methods of communication available to the County. Wis. Stat. §134.98(3)(a).
- C. A law enforcement agency may, in order to protect an investigation or homeland security, ask the County not to provide notice that is otherwise required for any period of time and the notification process required shall begin at the end of that time period. If the County receives a request from law enforcement to not notify the subject, the County is prohibited from providing notice of or publicize an unauthorized acquisition of personal information, except as authorized by the law enforcement agency that made the request. Wis. Stat. §134.98(5).
- D. If there is a breach that requires notification to 1,000 or more individuals, the County must report the breach to regulators such as consumer reporting agencies. The County must identify the timing, distribution and content of the notice sent to each individual. Wis. Stat. §134.98(2)(br). The three credit reporting bureaus are:

Equifax – 1-800-525-6285
Experian – 1-800-397-3742

TransUnion – 1-800-680-7289

- b. **Do we need to notify law enforcement?** Contact local law enforcement, the FBI or US Secret Service (if local law enforcement isn't familiar with investigating data breaches) to notify of the potential for identity theft. Does law enforcement want the County to forestall notifying affected individuals because it may impede an investigation? Does law enforcement want the County to leave out any details from the notification or information given to the public which may impede an investigation?
- c. **Does the breach involve electronic health information?**
 1. If the breach involves electronic health information, the County must comply with 45 CFR part 164, Subpart D – Notification in the Case of Breach of Unsecured Protected Health Information. 45 CFR §164.400-164.414.
- d. **Notify affected persons**
 1. The County must provide the notice by mail or by a method that the County has previously employed to communicate with the subject of the personal information. If the County cannot with reasonable diligence determine the mailing address of the subject of the personal information, and if the County has not previously communicated with the subject of the personal information, the County shall provide notice by a method reasonably calculated to provide actual notice to the subject of the personal information. Wis. Stat. §134.98(3)(b)
 2. Upon written request by a person who has received notice of a breach of personal information, the County must identify the personal information that was acquired. Wis. Stat. §134.98(3)(c).
 3. The County will provide the affected persons with information about:
 - How it happened
 - What actions the County has taken to remedy the situation
 - What actions the County are taking to protect individuals
 - How to reach the relevant contacts in the County for additional information
 - What steps they may take to protect their information
 - Current information about how to recover from identity theft from www.IdentityTheft.gov

- Information on what law enforcement is working on the case so that the victim may assist law enforcement with its investigation.
 - Information on how to file a complaint with the Federal Trade Commission using IdentityTheft.gov.
 - Information on how the County will contact them in the future, i.e. mail, telephone, etc.
- e. **Notify affected businesses.** If account access information, such as credit cards or bank account numbers have been stolen from the County information system, the County shall notify the institution that holds the account so that the institution can monitor the accounts for fraudulent activity. See Appendix A.

Approved by Administrative Committee on:

ⁱ AICPA Incident Response Plan, American Institute of Certified Public Accountants, Inc. New York, NY 10036-8775, Copyright 2004.

ⁱⁱ AICPA Incident Response Plan, American Institute of Certified Public Accountants, Inc. New York, NY 10036-8775, Copyright 2004.

ⁱⁱⁱ AICPA Incident Response Plan, American Institute of Certified Public Accountants, Inc. New York, NY 10036-8775, Copyright 2004.

Appendix Aⁱ

Specific requirements for reporting suspected or confirmed breaches of cardholder data.

MasterCard Specific Steps:

1. Within 24 hours of an account compromise event, notify the MasterCard Compromised Account Team via phone at 1-636-722-4100.
2. Provide a detailed written statement of fact about the account compromise (including the contributing circumstances) via secured e-mail, to compromised_account_team@mastercard.com.
3. Provide the MasterCard Merchant Fraud Control Department with the complete list of all known compromised account numbers.
4. Within 72 hours of knowledge of a suspected account compromise, engage the services of a data security firm acceptable to MasterCard to assess the vulnerability of the compromised data and related systems (such as a detailed forensics evaluation).
5. Provide weekly written status reports to MasterCard, addressing open questions and issues, until the audit is complete to the satisfaction of MasterCard.
6. Promptly furnish updated lists of potential or known compromised account numbers, additional documentation, and other information that MasterCard may request.
7. Provide finding of all audits and investigations to the MasterCard Merchant Fraud Control department within the required time frame and continue to address any outstanding exposure or recommendation until resolved to the satisfaction of MasterCard.

Once MasterCard obtains the details of the account data compromise and the list of compromised account numbers, MasterCard will:

1. Identify the issuers of the accounts that were suspected to have been compromised and group all known accounts under the respective parent member IDs
2. Distribute the account number data to its respective issuers.

Visa U.S.A. Specific Steps:

(Excerpted from Visa U.S.A. Cardholder Information Security Program (CISP), What To Do If Compromised, 3/8/2004)

Refer to documentation online at

http://www.usa.visa.com/media/business/cisp/What_To_Do_If_Compromised.pdf

In the event of a security breach, the Visa U.S.A. Operating Regulations require entities to immediately report the breach and the suspected or confirmed loss or theft of any material or records that contain cardholder data. Entities must demonstrate the ability to prevent future loss or theft of account information, consistent with the requirements of the Visa U.S.A. Cardholder Information Security Program. If Visa U.S.A. determines that an entity has been deficient or negligent in securely maintaining account information or reporting or investigating the loss of this information, Visa U.S.A. may require immediate corrective action.¹

If a merchant, or its agent does not comply with the security requirements or fails to rectify a security issue, Visa may:

- Fine the Member Bank
- Impose restrictions on the merchant or its agent, or
- Permanently prohibit the merchant or its agent from participating in Visa programs.²

Visa has provided the following step-by-step guidelines to assist an entity in the event of a compromise. In addition to the following, Visa may require additional investigation. This includes, but is not limited to, providing access to premises and all pertinent records.³

1 Visa U.S.A. November 2003 Operating Regulations 2.3.F.5

2 Visa U.S.A. November 2003 Operating Regulations 2.3.F.7

3 Visa U.S.A. November 2003 Operating Regulations 2.3.F.3, 2.3.F.4, 2.3.F.5, 2.3.F.6

Steps and Requirements for Compromised Entities

1. Immediately contain and limit the exposure.

- To prevent further loss of data, conduct a thorough investigation of the suspected or confirmed loss or theft of account information within 24 hours of the compromise. To facilitate the investigation:
 - Do not access or alter compromised systems (i.e., don't log on at all to the machine and change passwords, do not log in as ROOT).^{* 1}
 - Do not turn the compromised machine off. Instead, isolate compromised systems from the network (i.e., unplug cable).
 - Preserve logs and electronic evidence.
 - Log all actions taken.
 - If using a wireless network, change Service Set Identifier (SSID) on the access point and other machines that may be using this connection (with the exception of any systems believed to be compromised).
 - Be on HIGH alert and monitor all Visa systems.

2. Alert all necessary parties, including:

- Internal information security group and Incident Response Team, if applicable
- Legal department
- Merchant bank

³ A person with unlimited access privileges who can perform any and all operations on the computer.

- Visa Fraud Control Group at (650) 432-2978
 - Local FBI Office U.S. Secret Service – if Visa payment data is compromised
3. Provide the compromised Visa account to Visa Fraud Control Group at (650) 432-2978 within 24 hours.
 - Account numbers must be securely sent to Visa as instructed by the Visa Fraud Control Group. It is critical that all potentially compromised accounts are provided. Visa will distribute the compromised Visa account numbers to Issuers and ensure the confidentiality of entity and non-public information.
 4. Requirements for Compromised Entities
 - All merchant banks must:
 - Within 48 hours of the reported compromise, proof of Cardholder Information Security Program compliance must be provided to Visa.
 - Provide an incident report document to Visa within four business days of the reported compromise
 - Depending on the level of risk and data elements obtained the following must be completed within four days of the reported compromise:
 - Undergo an independent forensic review
 - A compliance questionnaire and vulnerability scan upon Visa's discretion

Steps for Merchant Banks

1. Contact Visa USA Fraud Control Group immediately at (650)432-2978
2. Participate in all discussions with compromised entity and Visa USA
3. Engage in a Visa approved security assessor to perform the forensic investigation
4. Obtain information about compromise from the entity
5. Determine if compromise has been contained
6. Determine if an independent security firm has been engaged by the entity
7. Provide the number of compromised Visa accounts to Visa Fraud Control Group within 24 hours
8. Inform Visa of investigation status within 48 hours
9. Complete steps necessary to bring entity into compliance with CISP according to timeframes described in “What to do if Compromised”

10. Ensure that entity has taken steps necessary to prevent future loss or theft of account information, consistent with the requirements of the Visa USA Cardholder Information Security Program

Forensic Investigation Guidelines

Entity must initiate investigation of the suspected or confirmed loss or theft of account information within 24 hours of compromise.

The following must be included as part of the forensic investigation:

1. Determine cardholder information at risk.
 - a. Number of accounts at risk, identify those stored and compromised on all test, development, and production systems
 - b. Type of account information at risk
 - c. Account number
 - d. Expiration date
 - e. Cardholder name
 - f. Cardholder address
 - g. CVV2²
 - h. Track 1 and Track 2³
 - i. Any data exported by intruder
2. Perform incident validation and assessment.
 - a. Establish how compromise occurred
 - b. Identify the source of compromise
 - c. Determine timeframe of compromise
 - d. Review entire network to identify all compromised or affected systems, considering the e-commerce, corporate, test, development, and production environments as well as VPN, modem, DSL and cable modem connections, and any third-party connections.
 - e. Determine if compromise has been contained.

² CVV2 is an authentication process established by credit card companies to further efforts towards reducing fraud for Internet transactions. It consists of requiring a card holder to enter the CVV2 number at transaction time to verify that the card is on hand. This number is printed on MasterCard & Visa cards in the signature area of the back of the card. (it is the last 3 digits AFTER the credit card number in the signature area of the card).

³ Track 1 is a "track" of information on a credit card that has a 79-character alphanumeric field for information. Normally a credit card number, expiration date and customer name are contained on track 1. Track 2 is a "track" of information on a credit card that has a 40-character field for information. Normally a credit card number and expiration date are contained on track 2.

3. Check all potential database locations to ensure that CVV2, Track 1 and Track 2 data are not stored anywhere, whether encrypted or unencrypted (e.g., duplicate or backup tables or databases, databases used in development, stage or testing environments data on software engineers' machines, etc.).
4. If applicable, review VisaNet endpoint security and determine risk.
5. Preserve all potential electronic evidence on a platform suitable for review and analysis by a court of law if needed.
6. Perform remote vulnerability scan of entity's Internet facing site(s)

Visa Incident Report Template

This report must be provided to Visa within 14 days after initial report of incident to Visa. The following report content and standards must be followed when completing the incident report. Incident report must be securely distributed to Visa and Merchant Bank. Visa will classify the report as "Visa Secret" *.

- I. Executive Summary
 - a. Include overview of the incident
 - b. Include Risk Level (High, Medium, Low)
 - c. Determine if compromise has been contained
- II. Background
- III. Initial Analysis
- IV. Investigative Procedures
 - a. Include forensic tools used during investigation
- V. Findings
 - a. Number of accounts at risk, identify those stored and compromised
 - b. Type of account information at risk
 - c. Identify ALL systems analyzed. Include the following:
 - i. Domain Name System (DNS) names
 - ii. Internet Protocol (IP) addresses
 - iii. Operating System (OS) version
 - iv. Function of system(s)
 - d. Identify ALL compromised systems. Include the following:
 - i. DNS names
 - ii. IP addresses
 - iii. OS version
 - iv. Function of system(s)

- e. Timeframe of compromise
- f. Any data exported by intruder
- g. Established how and source of compromise
- h. Check all potential database locations to ensure that no CVV2, Track 1 or Track 2 data is stored anywhere, whether encrypted or unencrypted (e.g., duplicate or backup tables or databases, databases used in development, stage or testing environments data on software engineers' machines, etc.).
- i. If applicable, review VisaNet endpoint security and determine risk.

VI. Compromised Entity Action

VII. Recommendations

VIII. Contact(s) at entity and security assessor performing investigation

* This classification applies to the most sensitive business information, which is intended for use within Visa. Its unauthorized disclosure could seriously and adversely impact Visa, its employees, member banks, business partners, and/or the Brand.

Discover Card Specific Steps:

1. Within 24 hours of an account compromise event, notify Discover Fraud Prevention at (800) 347-3102.
2. Prepare a detailed written statement of fact about the account compromise including the contributing circumstances.
3. Prepare a list of all known compromised account numbers.
4. Obtain additional specific requirements from Discover Card.

American Express Specific Steps:

1. Within 24 hours of an account compromise event, notify American Express Merchant Services at (800) 528-5200.
2. Prepare a detailed written statement of fact about the account compromise including the contributing circumstances.
3. Prepare a list of all known compromised account numbers.
4. Obtain additional specific requirements from American Express.

ⁱ No modifications have been made to the Attachment A as found in the American Institute of Certified Public Accountants, Inc. The copyright notice is found below.

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GREEN LAKE COUNTY
OFFICE OF CORPORATION COUNSEL

Dawn N. Klockow
Corporation Counsel

Office: 920-294-4067
FAX: 920-294-4069

MEMORANDUM

TO: Administrative Committee

FROM: Dawn N. Klockow

DATE: July 24, 2019

RE: Report of Office Activity from April 1 – June 30, 2019

Honorable Members of the Administrative Committee:

I am pleased to report my office's activities from April 1 – June 30, 2019. In continue to provide legal services to the Board, its committee and County departments. In addition to my duties of attending meetings, I continue to perform contractual and statutory duties with the Child Support agency and logged 6.9 hours in April, 17.4 hours in May, and 9.8 hours in June. I have seen a decrease in hours due to the court holding child support hearings only once per month rather than twice.

My other activities included:

- Attended a webinar on Complex ADA Issues in the Workplace on April 23, 2019.
- Attended the Wisconsin Municipal Mutual Insurance Co and Wisconsin Association of County Corporation Counsels seminar on May 3-4, 2019.
- Attended a webinar on Cyber Security on May 20, 2019.
- Attended the WINGS summit on guardianships and protective placements on May 22, 2019.
- Completed drafting the Data Breach Policy and met with Cathy Schmit, Bill Hutchinson, Gary Podoll, and Sheriff Podoll for discussion. This is one of my professional goals for this year.
- Co-taught the UW-Green Bay Behavioral Health Mental Health Training on June 11, 2019. I have two more training sessions left this year.
- Attended a webinar on ethics and privileged communications on June 20, 2019.

Included with this memorandum are the reports for the assignment and litigation files which show my activities for the last quarter.

It is a pleasure to continue serving the Green Lake County Board of Supervisors and County Departments.

Green Lake County
Activity By Staff and Category
From 4/1/2019 through 6/30/2019
Selected Staff

Cat	Description	Beginning Balance	Received	Completed	Ending Balance
CON	Contracts / Agreements	7	18	19	6
EMP	Employment	1	1	1	1
INFO	Informational file	1	2	0	3
MISC	unable to catogorize	0	3	3	0
MOU	Memorandum of Understanding	0	1	1	0
NC/NI	Notice of Claim/Injury	0	2	0	2
OPIN	Opinions	1	9	7	3
ORD	Ordinances	3	3	6	0
POL	Policy	3	4	2	5
REA	Real Estate	1	1	0	2
REC	Records Request	0	4	4	0
RES	Resolutions	0	4	4	0
RSCH	Research	0	1	1	0
ZON	Zoning Enforcement	1	1	2	0
	Total	18	54	50	22

Green Lake County
Activity By Staff and Category
From 1/1/2019 through 6/30/2019
Selected Staff

Cat	Description	Beginning Balance	Received	Completed	Ending Balance
COL	Collections	2	1	3	0
CON	Contracts / Agreements	7	36	37	6
EMP	Employment	3	5	7	1
INFO	Informational file	1	3	1	3
MISC	unable to catogorize	1	3	4	0
MOU	Memorandum of Understanding	0	1	1	0
NC/NI	Notice of Claim/Injury	1	2	1	2
OPIN	Opinions	2	13	12	3
ORD	Ordinances	4	8	12	0
POL	Policy	3	6	4	5
REA	Real Estate	1	2	1	2
REC	Records Request	1	7	8	0
RES	Resolutions	0	7	7	0
RSCH	Research	0	1	1	0
ZON	Zoning Enforcement	0	2	2	0
	Total	26	97	101	22

Green Lake County
Activity By Staff and Category
From 4/1/2019 through 6/30/2019
Selected Staff

Cat	Description	Beginning Balance	Received	Completed	Ending Balance
BNK	Bankruptcy	2	1	2	1
CLLE	Claim - Law Enforcement	1	0	0	1
CLPI	Claim - Personal Injury	1	0	1	0
COLMIS	Collections - Miscellaneous	1	1	1	1
COLRE	Collections - Real Estate taxes	2	0	1	1
ELDER	Elder Abuse / Restraining Order	0	2	2	0
FOREC	Foreclosure	1	3	1	3
GDN	Guardianship	1	1	2	0
GDN&PP	Guardianship with Protective Placement	0	1	1	0
HHAZ	Human Health Hazard	0	1	1	0
ME	Involuntary Mental Commitment	8	11	14	5
MISC	Miscellaneous litigation	3	0	1	2
TPR	Termination of Parental Rights	0	2	0	2
WATT	Watts Reviews	0	1	1	0
	Total	20	24	28	16

Green Lake County
Activity By Staff and Category
From 1/1/2019 through 6/30/2019
Selected Staff

Cat	Description	Beginning Balance	Received	Completed	Ending Balance
(Blank)		0	1	1	0
ALC	Alcohol Commitment	1	0	1	0
BNK	Bankruptcy	1	3	3	1
CLLE	Claim - Law Enforcement	1	0	0	1
CLPI	Claim - Personal Injury	1	0	1	0
COLMIS	Collections - Miscellaneous	1	2	2	1
COLPD	Collections - Property Damage	1	0	1	0
COLRE	Collections - Real Estate taxes	1	1	1	1
ELDER	Elder Abuse / Restraining Order	0	2	2	0
FOREC	Foreclosure	3	4	4	3
GDN	Guardianship	3	1	4	0
GDN&PP	Guardianship with Protective Placement	0	2	2	0
HHAZ	Human Health Hazard	2	1	3	0
ME	Involuntary Mental Commitment	10	22	27	5
MISC	Miscellaneous litigation	3	2	3	2
TPR	Termination of Parental Rights	0	2	0	2
WATT	Watts Reviews	0	1	1	0
ZON	Zoning	3	0	3	0
	Total	31	44	59	16



GREEN LAKE COUNTY

OFFICE OF THE COUNTY ADMINISTRATOR

Catherine J. Schmit, County Administrator Office: 920-294-4166
cschmit@co.green-lake.wi.us FAX: 920-294-4135

Administrative Committee – August 2019

Since my last quarterly report in May 2019, I have participated in the following tasks:

- Monthly Department Head/Budget Kick-Off meeting(s)
- Kicked off 2020 Annual Budget process, presented to County Board, distributed worksheets to departments
- Participated in several WCA sponsored weekly webinars regarding 2020 budget legislation
- Drafted Pay for Performance Resolution for adoption by the County Board prior to development of the 2020 Annual Budget
- Coordinated several staff budget workshops to facilitate development of the 2020 annual budget with one-on-one staff assistance available
- Participated in several health insurance/employee benefit related meetings, exploring options.
- Attended: ICC Meeting(s); WCA County Officials Fraud Workshop June 17th; TREDC related meetings (multiple)
- Attended Drug Court participant graduation
- Facilitating implementation of new staff online timekeeping system; in progress
- Implemented Supervisory Management training through Moraine Park Technical College held Summer 2019; 15 participants completed the program in July
- Coordinating with County representatives and consultants on Government Center Structural and Electronic Security Upgrades including design, RFP's and award of contracts
- Coordinating with Countywide Ambulance Service Committee, City of Berlin Administrator, Northern and Southern Green Lake County area ambulance service representatives, etc. regarding the feasibility study exploring countywide ambulance service. Reviewing proposals received in July
- Successful 2019 annual audit completed in April; currently working on annual Indirect Cost Plan July 29 - 30
- UWEX discussions regarding role of staff related to Fair vs. UWEX
- Recruited new IT Staff position; interviews pending
- Consulted with Sheriff regarding recruitment of new Chief Deputy due to pending retirement of Chief Deputy Putzke
- Planning 2nd annual employee appreciation picnic to be held at Dodge Co. Park starting at 4:30 pm on August 29th
- Upcoming:
 - Green Lake County Fair August 1 – 4, 2019
 - 2nd Annual Employee Appreciation Picnic August 29, 2019
 - WCA Annual Conference; WI Dells, WI September 22 – 24, 2019



GREEN LAKE COUNTY

OFFICE OF THE COUNTY CLERK

Elizabeth Otto
County Clerk

Office: 920-294-4005
FAX: 920-294-4009

ADMINISTRATIVE COMMITTEE CLERK'S REPORT August 6, 2019

Activities in the County Clerk's office for the past 3 months have included:

- ❖ In May I attended a quarterly CDBG (Community Development Block Grant) meeting in Juneau County. Green Lake County is a member of the 9 county region that provides no interest loans to qualified individuals to eliminate housing conditions that are detrimental to public health, safety, and welfare. Some eligible projects include roofing, septic, wells, lead paint elimination, and updated electrical services. One of the biggest hurdles seems to be getting the word out to people to apply for the loans. I have pamphlets in my office with information on the loans as do other departments in the county such as the Treasurer's office, Economic Support, and Veteran's Service Office.
- ❖ The annual snowmobile grant funds from the DNR have been dispersed as of this week. The total grant funds awarded to Green Lake County for this year were \$35,940.00 and the total expenses submitted totaled \$42,710.05. We have submitted a request to the DNR for supplemental funds which was due on August 1 so the clubs may see more reimbursement depending on how much of that request is granted. With the additional snowfall this year, many counties will be requesting extra funds so we may not see 100% reimbursement.
- ❖ I assisted with the RFP (Request for Proposals) process for the ambulance feasibility study for the Ambulance AdHoc committee. The committee has met four times so far and has another meeting scheduled for September 9 to review and possibly decide on a consulting firm for the study.
- ❖ Two boat launch terminals were installed in May at both Dodge Memorial and Sunset Park. There have been quite a few problems up to this point which we believe are most frequently caused by the cell tower carriers in this area. Maintenance Supervisor Scott Weir and myself have spent a large amount of time working with IPS, Inc. to resolve the problems. I have heard good comments about the terminals when they are working right so I think the public likes them in general. The County Clerk's office is the sole outlet for purchase of an annual pass this year so we have been busy up to this point with those sales. We are currently at 430 annual passes sold.
- ❖ In June I attended the annual Wisconsin County Clerk's Association conference in Hudson, Wisconsin. Main topics of education included election security, voting machine options, and a variety of seminars from the Wisconsin Counties Association. Networking with other County Clerks is always an informative and essential function of my position and provides new ideas and information each time.
- ❖ An updated version of RollCall Pro was installed in the County Board room which is the voting system we use for County Board meetings. The update is more user friendly than the previous version so it is easier for the supervisors as well as myself. We have had two meetings since the change so I am still learning a few

things but it is a definite improvement. This update was included in our annual maintenance contract so there was no additional cost to the county.

- ❖ I have been working closely with Deb Sweeney in IT to implement the new Alio Timekeeping system for payroll. This has been a very challenging process with all of the different types of employees and pay classes we have here at Green Lake County. The initial setup is complete and we have a number of people using the system now. Employees are being brought on by department and should be complete by the end of September. I would like to thank Deb for her hard work on this project – we have worked well together and she has worked tirelessly on this for a number of months!
- ❖ I am continuing to work on and gather information regarding health insurance options for 2020. Harley Reabe, Cathy Schmit, and I have had a few meetings with various carriers and are also reviewing the state health plan.
- ❖ We have scheduled a fall election training for all of the municipal clerks and Chief Inspectors on Thursday, October 3 from 4:30 – 6:30. Samantha, Nan, and myself will be working on an agenda for the training that will be approved by the Wisconsin Elections Commission (WEC) so that it counts toward the required hours of training that clerks and inspectors need to have for each term.
- ❖ In May I reported on a possible loss of revenue in marriage licenses this year. So far this year we have 48 licenses sold compared to 71 last year at the end of July. This is a rather substantial downturn that I feel has been significantly impacted by the Heidel House closure.
- ❖ I would like to thank Samantha and Nan in my office for their help the last few months while I have been involved in the timekeeping implementation. They have been great keeping the day to day operations on track!

As always, feel free to contact me with any questions or comments you have.

Respectfully submitted,

Elizabeth Otto

Elizabeth Otto
County Clerk



Green Lake County Information Technology Department

Bill Hutchison, Information Technology Director
bhutchison@co.green-lake.wi.us (920) 294-4160

July 30th, 2019

Memo to Administrative Committee:

Highlights of IT Department activity since May 2019 report to the committee:

- To date, completed 8 of 12 capital projects budgeted for this year.
- Continued weekly security updates and patching of all IT systems.
- Proxy system upgraded.
- Upgraded and completed install of all new wired network switches at GC over weekend.
- All network switching gear brought up to current firmware across all sites.
- Continued work to refresh or remove outdated software packages across all departments.
- Wrapped up year-long planning with successful main GC UPS replacement in June.
- Worked out HA for server room power clients between new UPS and Dispatch UPS, and vice versa.
- Involved in numerous meetings to work out setup for department's use of Alio Time.
- Presented and answered questions about Alio Time at Dept Head meeting.
- Alio Time rollout to departments.
- Working with HR on new position.
- All RoD Fidler software upgraded to current.
- On-going research, cost gathering, and meetings for development of 2020 IT budget.
- Completed work to support Fair operations at HWY facility for Fair week.
- Finished providing Fair with new electronic judging system they requested.
- Setup and distributed new County iPhones and iPads as requested.
- Replaced and upgraded all County IT hardware used in Dispatch center.
- Updated all server security certificates.
- County Board Roll Call system upgraded to current.
- Ran security trainings for May, June, and July. Ramped up constant follow-on testing.
- Increased security stance around inbound emails in continued effort to layer our security.
- Moved to new State capture system replacing old scan system in use by HHS.
- Testing Evidence room barcode and printer equipment for compatibility with upgrade.

Respectfully submitted,

Bill Hutchison
Information Technology Director



GREEN LAKE COUNTY
OFFICE OF THE REGISTER OF DEEDS

Sarah Guenther
Register of Deeds

Office: 920-294-4024
FAX: 920-294-4009

August 5, 2019

Memo to Administrative Committee

From: Sarah Guenther, Register of Deeds

Our office has been working on a plat scanning project. On Qsolutions scanned our aperture cards onto a drive. To save money the staff is going to print the images and get them scanned into our system. Renee Thiem-Korth has been spearheading this project. This will be a huge asset when completed as we receive online requests for plat maps on a weekly basis.

Another project that is being worked on is a media conversion project. A scanning project was done several years ago but hadn't been converted to useable data in our IDOC system. We are currently in the process of working on this project. Our software company Fidlar is doing the conversion and we will have several volumes of books in the system. These records are from 1863-1918. This will ensure the safety of these records and also will provide searchers with additional data.

At the end of July we implemented a software product called WIDOR. This eliminates hand entry of transfer receipts.

Deputy Jane Thomas has been very busy with vital record requests. The Department of Motor Vehicles has been sending out driver's license renewals. To get the Real ID, which gives you the ability to board a plane or enter a government building you need a certified birth certificate, certified marriage certificate if you have had a name change, and several other forms of ID. The Real ID will be required nationally October 1, 2020.

I have been working collaboratively with several business partners from the Wisconsin Bar Association, and Wisconsin Land Title Association to rewrite a form used in our office frequently. The form is the Transfer by Affidavit under \$50,000. The law changed last year for notification of heirs and the form did not reflect the law changes. The new form should be available soon for the public to utilize. Just recently this form was removed from the State's probate site.

Respectfully Submitted,

Sarah Guenther
Green Lake County Register of Deeds



GREEN LAKE COUNTY

OFFICE OF THE COUNTY TREASURER

Amanda R Toney
Treasurer and Real Property Lister

Office: 920-294-4018
FAX: 920-294-4009

July 31, 2019

Below is an outline of the activity in the County Treasurer's office over the last 3 months:

- ✓ As of the end of the day on 07/29/2019, we still have a balance of \$2,782,900.54, roughly 6.75%, to collect for the 2018 tax roll
- ✓ I was unable to attend the Summer Conference in Waupaca this year. I sent my Chief Deputy Stefanie Meeker to this conference in my place. I have included her write-up of the conference.
 - *The Round Table Topics I participated in were:*
 - *What special processes do you use when a taxpayer is in bankruptcy? Any other bankruptcy related questions? - There was a lot of discussion in this group. I took several notes to share with our office on this topic.*
 - *Lottery Credit Audits process/procedures – Again, there was much discussion on this topic. The Association would like to obtain a better timeline from the DOR on the audit process. They'd also like to have the DOR supply their reason for questioning a property owner's eligibility to receive the lottery credit, this could potentially save our office time in that we wouldn't be searching for something the DOR may already have the information on.*
 - *I attended the presentations on both tax deed and In Rem tax foreclosure processes. The In Rem tax foreclosure was a great presentation given by Teri Jacobson, Kenosha County Treasurer, who is a wealth of information. Again, I took several notes and have a lot of information to share with our office. The tax deed presentation was also good. This process is familiar to me since it is what our office has practiced in the past. There was good discussion amongst all who attended on both processes.*
 - *Two representatives from the Department of Revenue spoke on their areas of expertise. One being the Property Tax Assessment process, the other being the technical side of things. For example, the new MyGov program being initiated across the State for municipalities and counties. I found both sessions to be educational and was pleased to see both representatives were looking for feedback on how they can better assist municipalities and counties.*
 - *I would like to thank Mandy for suggesting I attend this conference in her absence. I thoroughly enjoyed the educational side of it and speaking with other professionals in this field.*
- ✓ Assisted the auditors during their visit to confirm our practices, procedures and to verify balances.
- ✓ Completed the Lottery & Gaming Credit reclassification procedures that were due to the state.
- ✓ Participated in Youth County Government Day. Every year we try to do something a little different to keep our presentation interesting for the participants.
- ✓ Converted to a new online banking platform for Horicon Bank. This meant re-entering all of our ACH transactions that were in the old system.
- ✓ Attended the District 2 Treasurer's meeting on May 20th in Lake Geneva
- ✓ Our office imported 15 of the 16 municipalities real estate and personal property assessed values. The City of Princeton is going through a re-assessment so we do not have their figures yet.
- ✓ Assisted in setting up the automatic boat launch deposits.
- ✓ Started the In-Rem process for those tax payers with delinquent 2015 taxes.
- ✓ Continue to work on the 2020 budget.

Respectfully submitted,

Amanda R Toney

County Treasurer/Real Property Lister