Co-Defendant Referrals

On the person search screen, search for Co-Defendant 1 to determine if the record exists in the PAO case management system, then click on **Search**.

If a person record is **not** found, you will see the screen below.

If there is a person record that matches in PAO's case management system, verify the name and identifiers. If it is the correct person, click on the person's name to proceed to the next screen. If not, click on **Create New Person**.

If you selected the person's name, on the next screen, verify the address and contact information. Update the screen as needed, but do **not** update the UCN field. Click on **Add Case**.

On the New Referral Creation screen, enter the Referral information within the **Referral, Arrest, Charge and Witness** tab then upload files under the Documents tab. The co-defendant should be added after all information and file uploads. This will ensure the files are uploaded to the co-defendant case.

Fill out the following:

- Report #
- Police and Agency
- Venue
- Charge(s)
- Witness tab
- Upload documents - Prior to submittal you can also click on individual co-defendants and then upload specifics there… but it is not ideal. One way to do it

currently is to click on the Co-Defend tab, then the name of the co-defendant, then upload documents for each co-defendant in that manner.

To add a co-defendant, click on the Co-Defend tab and click on Add Defendant.

Search for the co-defendant record using the fields below. Name search is the most common. Then click on **Search**.

If the defendant is found, click on the name. If not, click on **Add CoDefendant**.

After clicking on the defendant name, verify and update the address as needed then click on **Add Codef**.

If you need to make changes, upload specific documents or add different charges for <u>one</u> co-defendant only, click on the Co-Defendant name that needs the change then make the necessary changes.

If you need to remove a Co-Defendant from a referral, click on the Co-Defend tab and delete the **Report #** under the Co-Defend tab then click on **Accept**.

Once the referral is complete, you can **Preview Referral** to ensure everything is entered correctly then click on **Refer Case**.

After clicking on Refer Case, it will ask if you would like the charges to apply to the co-defendant referral. If yes, leave the box checked. If no, uncheck the box.

Co-Defendant cases to be added at a later time

If a referral was previously submitted for a co-defendant case and it is later determined that another co-defendant is to be added to the already referred case(s), please submit the new co-defendant referral without linking any of the previously submitted co-defendant(s). Once the referral is submitted and referred, email the Filing Unit with the details to link the new referral to the previously submitted co-defendant case. It is helpful to list the LE report # and co-defendant name in the email to the Filing Unit.

Note: create initial referral, get all charges set, witnesses set, add all files/documents, and only then (very last thing) add the co-defendant(s)…. Then, when case is referred, each co-defendant is referred with ALL uploaded documents.