

## Complainants/Resident/Alleged Perpetrator

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State Agencies can maintain a directory of complainants, residents, and alleged perpetrators from Tree view. This information is usually added in the intake, but if a mistake is made, this is a central place to make corrections, i.e., a misspelling or add a phone number. These directories are filtered by the active selection set, and are not available in ARO.

You can right-click the directory nodes to:

- Search
- Set the display to view all, regardless of the selection set

You can right-click a member of each directory to:

- Modify
- Delete
- Merge (scenario follows)
- Print Quick Reports (Complainant only)

## Complainant Example

To demonstrate the search capability and how the active selection set affects the display, the class will search for a complainant named Silas Brown Jr.

### 1 Find complainant

- Open **ACTS**.
- Right-click the **Complainants** node.
- Select **Find Complainant**.
- For Search Text, type: **Brown**
- With **Search By Name** selected, click **Find Now**.

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**Note:** The Find Now function only searches by last name.

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- In Search Results, locate Silas Brown Jr. and either double-click the name, or highlight the name and click **Select**.

ACTS takes you directly to the name in tree view.

## 2 View associated intakes

You can easily see how many intakes Silas Brown Jr. has been involved with by expanding the node.

- Click the **plus** beside Silas Brown Jr.

Several intakes are listed.

- De-activate the active selection set so that you see all intakes associated with this complainant.
  - Expand the **My Selections** node.
  - Right-click the active selection set with the green arrow icon.
  - Select **Deactivate**.

To view all associated intakes:

- Expand the **Complainants** node,
- Expand the **B** node and locate **Silas Brown Jr.**
- Click the **Plus (+)** beside the name of the complainant.

All associated intakes are listed below.

## 3 Filter complaints

- Now activate the selection set called **Complaints Last 30 Days**.
  - Expand the **My Selections** node.
  - Right-click **Complaints Last 30 Days** and select **Activate**
- Locate the complainant, Silas Brown Jr. again.
- Click the **Plus (+)** beside the name of the complainant.

You now see associated intakes only for the past 30 days.

- Right-click the **Complainants** node.
- Select **Set Complainant Intake Display**.
- Click **Yes** to confirm.

This setting overrides the selection set and displays all intakes.

This time, search for a complainant name that begins with your training letter.

### 1 Find complainant

- Open **ACTS**.
- Right-click the **Complainants** node.
- Select **Find Complainant**.
- For Search Text, enter: **Your training letter**
- With Search By Name selected, click **Find Now**.
- In Search Results, double-click or highlight any name and click **Select**.

### 2 Complainant maintenance

- Right-click the complainant name and click **Modify Complainant**.

The title, name, address, phone numbers, and email address are easily accessed from this window to adjust an address, add a phone number, etc.

Letter macros exist to pull title, name, and address fields from this directory into letters.

- Click **Cancel** to close Modify Complainant.

### 3 Quick Reports

- Expand the complainant to see if they have intakes. If not, locate another complainant whose name begins with your training letter, who does have intakes. Note the date of the intake(s).
- Right-click the complainant again and select **Quick Report**.
- Select **Complaint Intake History** and click **OK**.
- Click **OK** to the message about redaction information.
- Adjust the date range of the report to include the dates of the associated intakes listed in Tree view, and click **OK** to generate the report.
- When you are finished viewing the report, select **File | Close**.
- Right-click the complainant again and select **Quick Report**.
- Select **Complaint Intake Summary** and click **OK**.
- Adjust the date range as you did for the previous report and click **OK** to generate the report.
- When you are finished viewing the report, select **File | Close**.

### 4 Delete Complainant

- Right-click the complainant and select **Delete Complainant**.

Note that the complainant cannot be deleted if they are assigned to any intakes.

- Click **OK**.