

eFlex Electronic Filing – Court Review User's Guide for Clerks

Montgomery Probate Electronic Filing

July 2016

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User Account

Montgomery County Probate Court has appointed a system administrator or local administrator to establish user accounts for all court employees. Each user who has access to the Court Review interface has also been given certain permissions based on specific roles determined by the Office of the Court and implemented by the system administrator.

Please note that within this guide that there may be screens and instructions that are not pertinent to every user's responsibilities. The ability to navigate within the system and access particular screens is configured based on user role, should be in accordance with normal work-flow needs as determined set by the court administration, and is configured by the system administrator.

Login

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The user will log into the eFlex system using their username and the password when the account is set up/has been approved by the administrator.

The username and password can be used to login to the "Clerk Review Interface" as well as the courthosted "Filer Interface." The Filer Interface can be access by entering a different URL in the address box of your browser. The user will login to the "Clerk Review Interface" to review and approve filings and access "Queues."

The court user must be within the court computer network to access the "Clerk Review" web page. The "Filer Interface" web page will also be accessed from within the court computer network.

https://go.tybera.net/mcp

https://go.tybera.net/mcp/courtreview

Figure 1: Clerk Review Login Screen

NTGOMERY	ESTATES - TRUSTS - ADOPTIONS - MARRIAGE LICENSES - MINOR INJURY CLAIMS	Review
al faisints		user: System Administrat
Log In		
Please enter	your User Name and Password.	
User Name:		
Password:		
	Log In	
Forgot Your Pas	sword?	
Forgot Your Use	er Name?	
New Users		

Password Recovery

- 1. In the event the user forgets their password, they should click the "Forgot Your Password" link.
- 2. The "Request Password Reset" page will appear. Enter the "User Name."

Figure 2: Request Password Reset

MONTGOMERY	Probate Court ESTATES - TRUSTS - ADOPTIONS - MARRIAGE LICENSES - MINOR INJURY CLAIMS	Clerk Review	
Reset Password			
Request Pas	ssword Reset		
After submitting page containing	your user name, an email will be sent to the primary email address listed in you a new random password. You will be able to log in to ECF using this new passw	r account. This email will contai ord and then change your passy	n a secure link to ECF that will display a vord to one of your choosing.
Enter your use	r name below:		
Enter your use	r name below:		

3. An email providing a link to a temporary password will be sent to the email address listed in the "User Profile." This email will be the court email address unless they have changed the address initially entered by the system administrator upon account setup.

- 4. The user should check email for the link to the temporary password and use the provided password to access the account.
- 5. Follow the instructions to reset the password.

Navigating from the Home Page

The "Home" page is the first screen upon login. The appearance of the home page varies dependent upon the user's role. A judge will have fewer elements on his home page than an administrative clerk will have.

Figure 3: Home Page Clerk Review

MONTGOMERY	Probate Court MISCELLANEOUS - ESTATES - TRUSTS - GUARDIANSHIP - ADOPTION AND CIVIL COMMITMENTS	Court Review				
Home	Filings CASEaDia My Profile Logout	user: Roxanne Williams				
Home	Menu Bar	User Name				
<u>Approve</u>	Filings Approve Filings					
<u> </u>	eport Filings Report					
View <u>Q</u> u	Queues List of entries in my queues					
Resolve	Filings On Hold					
Quick Ac	ccess Buttons					

- 1. All the basic Clerk Review functions for each role are accessed by clicking the appropriate button on the "Home" page.
- 2. The user can also navigate using the menu bar, located across the top of every page.
- 3. The user's first and last names appear on the right side just below the banner. This is based on the user's profile information.
- 4. To log out and terminate the current session to the e-filing server, click **Log Out** on the menu bar.

Note: The web session will terminate automatically if there is no activity on the webpage for 30 minutes. A session is considered active as long as the user is interacting with the web server. Clicking on a button that causes the screen to change or refresh is considered being active. Examples of activity would include clicking **Submit, Refresh, Next, Upload Signature,** or **Approve/Reject/Reassign.** Typing in a text field on a web page or changing the document type on the "Approve Filing" page does not count as being "active."

When the system logs the user out, the screen doesn't change. It appears that the user is still logged in. As soon as the user clicks a button, the login screen will display so that the user can login with a new session.

Warning: Do NOT login to more than one session of the Court Review Interface at a time. The eFlex application stores session data in the browser's memory. Logging into eFlex in multiple browser windows can cause significant problems in that the browser is unable to keep session data separate. If two different filings are opened in two different windows, the action a clerk believes is being done for filing A could actually be being applied to filing B.

Using Profiles

Managing Profiles

Each user maintains a profile. Upon initial login, check the User Profile to be sure information is accurate.

This section demonstrates how to

- Edit profile information
- Change the user password
- View login history

To View and Edit User Profile

1. Select My Profile>My User Profile from the menu bar.

Figure 4: User Profile Information

Home Filings	CASEaDia My Profile	Logout	user: Roxanne Williams
User Profile			
User Profile			
Devanne Williams			
KOXdille Willidills			
User Name:	RWE		
Organization:	MONTGOMERY COU	NTY PROBATE	
Bar Number:			
User Identifier:	U::RWE		
Phone:			
Fax:			
EMail:	EstepR@mcohio.org		
1st Alternate EMail:			
2nd Alternate EMail			
Address:	1362 W. 130 S.		
	Orem, UT 84058		
	US		
Role:	Clerk		
Case Categories:	Miscellaneous		
Date Approved:	Not Available		
Expiration Date:			
View Ids:	None		
Modify User Profile	Change Password) Upl	pad Signature) Select Gatekeeper)	

- 2. Review information displayed.
- 3. The user should select **Modify User Profile** to make changes. The "Modify User Profile" page will appear, allowing the user to change or add some profile information.

Note: Some fields were set by the system administrator when the user account was established and cannot be changed. Depending on the user's assigned role, these may include the user name, the organization the user is associated with, the user identifier (CMS id), court location, and case categories. The 1st and 2nd Alternate Email fields are primarily for the convenience of attorneys with legal assistants who need to be notified. Clerks do not need to enter an alternative email.

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Figure 5: Modify Profile Information

oxanne Williams		
Role: Clerk		
ourt Access:		
Case Categories: Mis View Ids: None	cellaneous	
User Name:	RWE	EMail Notification :
Title:		A filing is awaiting my approval
First Name:	* Roxanne	A queue entry needs to be assigned
Middle Name:		A queue entry has been assigned to me
Last Name	* Williams	Do NOT email me NEF's for my cases
Last Name:	··· Willdins	Do NOT email me status updates for received filing:
Suffix Name:		Do NOT email me status updates for approved film
Organization: Bar Number	MONIGOMERY COUNTY PROBATE	Do NOT email me status updates for rejected filing:
User Identifier:	U::RWE	
Phone:	Fax:	7
EMail:	* EstepR@mcohio.org	7
Confirm EMaile	* EstenR@mcobio.org	
Lot Altowarts FMs."	Estepremiconiolog	
TSU AILEFHATE EMAIL		
2nd Alternate EMail:		
Use My Company	s Address	
- oserry company	1362 W. 130 S.	
	Orem, UT 84058	
	US	
Use My Address	12C2 W 120 C	
Address Line 1: *	1302 W. 130 S.	
Address Line 2:		
Address Line 3:		
City: *	Orem State: UTAH	~
Postal Code: *	84058 Country: UNITED STATES ▼	

- 4. Fill in the fields. Fields marked with an asterisk are required.
- 5. The eFlex system generates and sends emails to the primary email address and any alternate email addresses listed in the User Profile. Configure what emails to receive by selecting the appropriate checkboxes.
- 6. After changes or additions are made, click **Submit** to save changes and be returned to the "User Profile" page.

To Change a Password

- 1. From the "User Profile" page, click the **Change Password** button. The "Change Password" page will appear.
- Alternately, from the menu bar at the top of the page, select My Profile > Change My Password. The "Change Password" page will appear.

Figure 6: Change Password

ONTGOME	ŖY	ESTATES - TRU	Prot STS - ADOPTIO	Date	Court	Y CLAIMS		Clerk Review
Home	Filings	CASEaDia	Accounts	System	Court Configuration	My Profile	Logout	user: System Administrato
Change I	Password							
Chang *Require Passwo	ge Passv d Fields rd:	vord * [
New Pa	ssword:	*						
Confirm	New Pas	sword: *						
Cano	el) _ !	Submit)						

- 3. Enter the old password.
- 4. Enter the new password twice in the spaces provided.
- 5. Click **Submit** to save changes and return to the "User Profile" page.

To Upload a Signature

In order for the eFlex system to function correctly, when a user elects to add signatures to his or her profile, one of the uploaded signatures must be selected as a primary signature. Although a signature is

flagged as the primary signature, the user will have the ability to choose which of his or her signatures to apply to individual documents.

1. From the "User Profile" page, click the **Upload Signature** button. The "Upload Signature" page will appear.

Figure 7: Navigate to Upload Signature through User Profile Page



Figure 8: Electronic Signature Upload

Upl	oad Signature	e		-	_	
Davi	d M. Farmer					
Curi	rent Signature(s)):				
	Primary Signature	Description	Changes Doc Date	Closing	Signature Text	Signature Image
		Alice O. McCollum	No			Ad M. Collun
Rem	✓ ove Signature) Upd	David Farmer ate Primary Signature	No			Cand My Humer
Uplo Prin Des App Sign Sign	ad a signature fr nary Signature: cription: * lying Signature (nature Closing: nature Text: nature File:	om a file: Changes Docume	nt Date:	Brows	se No f	ile selected
org				Signat	ure must l	be a .bmp, .gif, .jpg, .jpeg, or .pr
Ca	ancel 📄 Upload Sig	gnature)				

- 3. To configure signatures that are used for automatic signing in queues, fill in the text boxes with the appropriate information.
 - Primary Signature: One signature must be marked as primary in order to have access to the Signature Queue functionality.
 - Description: The text seen in the dropdown menu in the queues identifying the signature.
 - Signature Closing: Text, such as "So ordered" or "On Behalf of," that appears just above the image (if an image is used) or the electronic signature text.
 - Signature Text: Electronic signature text, usually following the format: /s/Judge Jones.

4. Click the **Browse** button to search the local computer or the network for the correct signature file to upload. Be sure the file to attach is one of the accepted formats and fits the dimensions and resolution requirements established by the court administration.

Thomas Barney Uploaded Signature Image											
Current Signature(5):	Channer									
Primary Signature	Description	Doc Date	Closing	Signature Text	Signature Image						
	So Ordered By	No	So Ordered By	/s/ Thomas Barney	Jour time						
Remove Signature) Up	odate Primary Signatu	nove S	ignature								
Primary Signature Iro	n a me.										
Description: *											
Applying Signature	Changes Docur	nent Dat	e: 🔲								
Signature Closing:											
Signature Text:											
Signature File:			Browse_	No file selected.							
<u>.</u>			Cignatura	re much he a home aif ing ineg or one file							

Figure 9: Electronic Signature Displayed after Upload

- 5. Click **Upload Signature** to upload the signature file, save the data entered, and refresh the page. The new signature now displays.
- 6. The **Remove Signature** button removes the signature that is selected.
- 7. **Update Primary Signature** allows the user to select a signature and make it the primary signature.

Figure 10: Multiple Signatures with Primary Checked



Note: The court user will be able to use multiple signatures. Simply follow the above procedure for as many signatures as needed, making sure the description entered is unique for each signature. The user should select the signature to be the primary and then click **Update Primary Signature**. This will place a checkmark (\checkmark) in the "Primary Signature" column.

To Select a Gatekeeper

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Judges or Magistrates are the primary role that would use a gatekeeper. Adding a gatekeeper to a user profile affects the queue process. Filings that route to queues assigned to a judge or magistrate will first go to his or her gatekeeper for review. The gatekeeper can then reassign the filing to the judge and include a note informing the judge if more review is necessary or if the filing is ready for his signature.

If a judge has added a gatekeeper, the system default is that the judge will not be able to view any filings routed to his queues until the gatekeeper has reassigned the filings to the judge or until the judge changes the search filters at the top of the My Queues page to include the gatekeeper's assigned queue entries.

 From the menu bar at the top of the page, select My Profile > My User Profile. Click Select Gatekeeper.

Figure 11: Selecting a Gatekeeper

Role:	Magistrate
Case Categories:	Miscellaneous
Date Approved:	Not Available
Expiration Date:	
View Ids:	None
Modify User Profile	Change Password Upload Signature Select Gatekeeper

2. The "Select Gatekeeper" page will appear.

Figure 12: "Select a Gatekeeper" Page

Home	Filings	CASEaDia	My Profile	Logout	user: David M. Farmer	
<u>User Profi</u>	le ⇒ Select (Gatekeeper				
Curre	nt Gatel	xeepers				
The gatek review or	ceeper will b finish the re	e assigned ent viewal proces	tries in the act s and await yo	ion queues that are meant to be reviewed by you. The gatekeeper v our signature.	vill review these items and either assign the	em for you to
Current	Gatekeepe	rs				
Default G	atekeeper					
Done						

3. In the example above, the user does not currently have a gatekeeper assigned. To configure the gatekeeper, click the **Edit** button.

Figure 13: Change Gatekeeper

David M. Eau	103 O F		
Javiu M. Fai			ware the tax and an address where we do not a state of the second state of the second state of the second state
re gatekeepe eview or finish	r will be assigned entries in the action que the reviewal process and await your sign	ature.	meant to be reviewed by you. The gatekeeper will review these items and either assign them for you t
Change Gate	keeper		
Company:	MONTGOMERY COUNTY PROBATE		
Gatekeeper:	** No Gatekeeper **	-	
	** No Gatekeeper **		
Cancel	AA - APPROVER, AUTO		
	AOM - McCollum, Alice O.		
	ASM - Miller, Arvin Seth		
	BAK - Kraus, Barbara A.		
	BWF - Ferrari, Beth W.	_	
	CK - Kidd, Catharine	=	
	DAV - White, David		
	DMF - Farmer, David M.		
	DRC - Cross, Danielle		
	DSR - Rodgers, Dionna S.		about Tybera Development Group, Inc.
	GFH - Heuker, Ginger F.		pera Development Group, Inc. All rights reserved.
	JG - Gallagner, Joseph		
	JR - Koolnson, Jayme		
	KMT Tinchor Karon		
	L - Lashley Loukia		
	LMT - Smith Laura M		
	LW - Williams Lisa		
	MAF - Weikert Marianne	-	

- 4. Select the appropriate person from the "Gatekeeper" drop-down.
- 5. Click **Save Gatekeeper** to save the selection and return to the "Select Gatekeeper" page.

Figure 14: Save Changes Made to Gatekeeper

Home	Filings	CASEaDia	My Profile	Logout	user: David M. Farmer
User Prof	île ⇒ Select (Gatekeeper			
Select	Gatekee	eper			
David M	1. Farmer				
The gate	keeper will b	e assigned en	tries in the act	ion queues that are meant to	be reviewed by you. The gatekeeper will review these items and either assign them for you to
Teview Of	This the te	eviewai proces	is and await ye	ur signature.	
Change	Gatekeep	er			
Compar	ny: MONTO	GOMERY COUL	NTY PROBATE		
Gatekee Cance	eper: WFF	- Francis, Wi Gatekeeper	ma F.	Ŧ	

6. Finally, click **Done**.

Figure 15: Completing the Process of Adding a Gatekeeper

Home	Filings	CASEaDia	My Profile	Logout	user: David M. Farmer
User Profi	le ⇒ Select (Gatekeeper			
Curre	nt Gatel	ceepers			
The gate review or	eeper will be finish the re	e assigned ent viewal proces	tries in the act s and await yo	on queues that are meant to be reviewed by you. The gatekeeper u ur signature.	will review these items and either assign them for you to
Current	Gatekeepe	rs			
Default G	atekeeper			Wilma Francis edit	
Done					

Login History

The "Login History" screen shows a list of failed login attempts, which can help the user monitor any unauthorized login attempts.

The eFlex system can be configured so that if an account has too many login failures, the system will automatically suspend the account. If this occurs, contact the court administrator to reset the account. Changing the password on a regular basis is one way to help avoid unauthorized access to the account.

To view Login History

 Select My Profile > View Login History from the menu bar at the top of any screen. The "Login History" page will appear.

Figure 16: Viewing Login Attempts

Home	Filings C	ASEaDia	My Profile	Logout		
Login Hist	ory					
Login	History					
David M	1. Farmer Log	g In Histo	ory			
Employ	ee Account S	tatus: Act	tive Entrie	s per page:	50	•
Date	e Logged In	Log In R	esult Req	uesting IP /	Addres	s
2016-06	5-17 15:04:22.0	0 Succeed	ed 192.1	68.247.151		
2016-06	5-17 14:27:48.0	Succeed	ed 192.1	68.247.151		
2016-06	5-15 12:02:45.0	0 Succeed	ed 192.1	68.247.151		
2016-06	5-15 11:57:18.0	Succeed	ed 192.1	68.247.151		
2016-06	-15 09:19:09.0	0 Succeed	ed 192.1	68.247.151		
2016-06	5-14 15:15:36.0	0 Succeed	ed 192.1	68.247.151		
2016-06	6-14 15:15:33.0	Denied	192.1	68.247.151		
2016-06	5-14 15:15:30.0	Denied	192.1	68.247.151		
2016-06	5-14 15:10:31.0	Succeed	ed 192.1	68.247.151		
2016-06	5-14 11:38:35.0	0 Succeed	ed 192.1	68.247.151		
 2016-06	5-14 11:15:41.0	Succeed	ed 192.1	68.247.151		

- 2. In addition to showing successful logins, the list shows the failed login attempts along with the date, login result, and IP address of the requesting machine.
- 3. Use the menu bar at the top of the page to navigate to another location on the eFlex Court Review system.

Working with Filings

Using Filing Reports

Access to "Filing Reports" is determined by a user's role and the permissions the role is given during system configuration. Although this can vary from court to court, generally, a "Lead Clerk," can view reports for the filings.

All filings received in "Clerk Review" are listed and stored in the report system. This report system is not a permanent system. The information in the reports is cleaned out after 90 days.

The "Filings" page lists all submission within a range. The default listing is today's filings. With the filters provided near the top of the page, a user can modify what is displayed in the list. When a filer calls because they are having a problem with a filing, these filters will help a lead clerk find the filer's submission more easily.

To Display a List of Filings

 Click Filings Report on the "Home" page or select Filings > Filings Reports from the menu bar. The "Filings" page will be displayed with today's filing information.

Figure 17: List of Filings

	Filings	CASEaDia My	rofile Logout	user: Roxanne William											
ome *> Fing Report															
Filing	lings														
40NTG	DNTGOMERY COUNTY PROBATE														
Status	tatus Report Criteria: Include Response and Outgoing Notices														
Filings Between: 06/01/2016 AND Status: All 💌 Processed By: All															
Trackin	na #:	Filer ID:	Case #:	Filer Name: All											
60)) Cle	ar Search													
All Fili	ings Betw	veen 06/01/2016	and today - Numbe	er of Filings: 100											
De	tails) I	Download						Filings per page:							
E !	Tracking #	Filor ID Caso #							50 -						
			Status	Document(s)	▼ Official File Stamp	Judge	Processed By	Filer's Name	S0 -						
	1303	1546	Status Awaiting Approva	Document(s) APPLICATION FOR CHANGE OF NAME - ADULT; ENTRY SETTING HEARING	▼ Official File Stamp 06-17-2016 02:31:14 PM	Judge	Processed By	Filer's Name Harry Beyoglides, Jr.	50 ▼ <u>Client</u>						
	1303 1302	1546 1545	Status Awaiting Approva Awaiting Approva	Document(s) APPLICATION FOR CHANGE OF NAME - ADULT; ENTRY SETTING HEARING APPLICATION FOR CHANGE OF NAME - ADULT; ENTRY SETTING HEARING	▼ Official File Stamp 06-17-2016 02:31:14 PM 06-17-2016 02:27:50 PM	Judge	Processed By	Filer's Name Harry Beyoglides, Jr. Harry Beyoglides, Jr.	50 ▼ Client ;						
	1303 1302 1301	1546 1545 1534 <u>2015MSC000</u>	Status Awaiting Approva Awaiting Approva Awaiting Approva 9 Receipt Issued	Document(s) APPLICATION FOR CHANGE OF NAME - ADULT; ENTRY SETTING HEARING APPLICATION FOR CHANGE OF NAME - ADULT; ENTRY SETTING HEARING MOTION	♥ <u>Official File Stamp</u> 06-17-2016 02:31:14 PM 06-17-2016 02:27:50 PM 06-16-2016 12:53:09 PM	Judae ARVIN SETH MILLER	Processed By	Filer's Name Harry Beyoglides, Jr. Harry Beyoglides, Jr. Michael Williams	50 ▼ <u>Client</u> #						
	1303 1302 1301 1300	Internet Case w 1546 1545 1534 2015MSC000 1450 1450	Status Awaiting Approva	Document(s) APPLICATION FOR CHANGE OF NAME - ADULT; ENTRY SETTING HEARING APPLICATION FOR CHANGE OF NAME - ADULT; ENTRY SETTING HEARING MOTION PETITION	▼ Official File Stamp 06-17-2016 02:31:14 PM 06-17-2016 02:27:50 PM 06-16-2016 12:53:09 PM 06-16-2016 12:33:34 PM	Judge ARVIN SETH MILLER	Processed By	Filer's Name Harry Beyoglides, Jr. Harry Beyoglides, Jr. Michael Williams Michael Williams	50 ▼ Client #						
	1303 1302 1301 1300 1299	Interno Case w 1546 1545 1534 2015MSC000 1450 1533	Status Awaiting Approva Awaiting Approva Receipt Issued Awaiting Approva Receipt Issued	Document(s) APPLICATION FOR CHANGE OF NAME - ADULT: ENTRY SETTING HEARING APPLICATION FOR CHANGE OF NAME - ADULT; ENTRY SETTING HEARING MOTION PETITION ENTRY	▼ Official File Stamp 06-17-2016 02:31:14 PM 06-17-2016 02:27:50 PM 06-16-2016 12:53:09 PM 06-16-2016 12:33:34 PM 06-16-2016 12:30:32 PM	Judge ARVIN SETH MILLER DAVID A. WHITE	Processed By RWE KMT	Eiler's Name Harry Beyoglides, Jr. Harry Beyoglides, Jr. Michael Wiliams Michael Wiliams David White	50 ▼ Client 4						
	1303 1302 1301 1300 1299 1298	Instruct Case S 1546	Status Awaiting Approva Awaiting Approva Receipt Issued Awaiting Approva Receipt Issued Acceipt Issued Receipt Issued Receipt Issued	Document(s) APPLICATION FOR CHANGE OF NAME - ADULT: ENTRY SETTING HEARING APPLICATION FOR CHANGE OF NAME - ADULT: ENTRY SETTING HEARING MOTION PETITION ENTRY WAVER-OCN	V Official File Stamp 06-17-2016 02:31:14 PM 06-17-2016 02:27:50 PM 06-16-2016 12:53:09 PM 06-16-2016 12:33:34 PM 06-16-2016 12:30:32 PM 06-16-2016 10:04:32 AM	Judge ARVIN SETH MILLER DAVID A. WHITE DAVID A. WHITE	Processed By RWE KMT KMT	Elec's Name Harry Beyogides, Jr. Harry Beyogides, Jr. Michael Wiliams Michael Wiliams David White David Schmidt	Client 4						
	1303 1302 1301 1300 1299 1298 1297	Institution Constraint 1546 1545 1534 2015MSC000 1450 2016MSC000 1532 2016MSC000 1531 2016MSC000	Status Awaiting Approva Awaiting Approva Awaiting Approva Quarting Approva Awaiting Approva Awaiting Approva Receipt Issued Awaiting Approva Receipt Issued Receipt Issued Receipt Issued Receipt Issued	Document(s) APPLICATION FOR CHANGE OF NAME - ADULT: ENTRY SETTING HEARING APPLICATION FOR CHANGE OF NAME - ADULT: ENTRY SETTING HEARING MOTION PETITION ENTRY WAIVER-OCN WAIVER-OCN	♥ Official File Stamp 06-17-2016 02:31:14 PM 06-17-2016 02:27:50 PM 06-16-2016 12:53:09 PM 06-16-2016 12:33:34 PM 06-16-2016 12:30:32 PM 06-16-2016 10:04:32 AM 06-16-2016 10:01:52 AM	Judge ARVIN SETH MILLER DAVID A. WHITE DAVID A. WHITE DAVID A. WHITE	Processed By RWE KMT KMT KMT	Eller's Name Harry Beyoglides, Jr. Harry Beyoglides, Jr. Michael Wilams Michael Wilams David White David Schmidt David Schmidt	50 ▼ Client 4						

2. The "Filings" entries can be used for monitoring and management. There are several features that are used by the monitoring administrator. Click on the column head to sort the listings in ascending or descending alphabetical order.

Understanding the Filings Page

The following provides a description of the features of each column.

- **Checkbox:** Used in conjunction with the **Details** button or the **Delete** button. Not all users will have the **Delete** button. With the **Details** button, only one checkbox should be marked. The **Delete** button allows multiple checkbox selections.
- ! (Red exclamation): This column is used for a variety of symbols indicating a special situation. For instance, a red asterisk may appear and indicates an error.
- **Tracking #:** Not all submissions go through the Filer Interface so the Tracking # is assigned in the Clerk Review Interface. For instance, an order filed by a judge may originate in a judicial queue in the Court Review Interface.
- Filing ID: The ID given to the submission by the Filer Interface.
- **Case #:** The case number assigned by the CMS. Click the case number to view the case history. If there is no case number, the filing is a case initiation.

- **Status:** The last status assigned to the filing. If the filing is in process, this may continue to change as the user refreshes the page.
- Document(s): Click the document(s) link of an entry to display the Filing Details.
- Official File Stamp: The date/time recorded when the submission was received by the Clerk Review Interface but not when the clerk approves the submission.
- Judge: The judge assigned to the case, if any.
- Processed By: The username of the person who approved the filing.
- Filer's Name: The name of the filer who sent in the submission.
- **Client #**: This number is optional. It is entered by the filer and used to identify their client within their office record system.

Understanding Filing Status Listed on the Filings Page

The following list identifies the statuses that the clerk will need to understand to respond to a filer's question if they call. These are filing statuses that the filer might see.

- Sending A temporary state after the filer has clicked "Submit" as the filing is being transferred to the court.
- **Received** The submission has received a time stamp and will be placed in a queue for further processing.
- Awaiting Approval The submission is in a queue for further processing.
- Filed The Clerk has approved the submission, and it is being processed. Be patient.
- **Receipt Pending** An error occurred in communications and the filing is on hold. Call the e-Filing administrator.
- **Rejected** Submission was denied. See the note from the clerk for an explanation.
- **Filed** No further action. The filer should look at their case history or receipt of the submission to download signed documents and check for notes from the Clerk.
- Filed-Presented to Judge Accepted and routed to a Judicial Queue for a judge to review. This means that even though the submission has been filed, the proposed document may not have been reviewed at this time, but it has been presented to a judge.

• **Resubmitted** - This submission was "Rejected," and the filer used the old submission to create a new submission. The status of this submission marked "Resubmitted" has no future value, and the filer needs to look at the new submission status.

The following list identifies the states that the clerk can see in the Filings Reports that the filer does not see.

- Approved The submission is approved and leaving the Clerk Review queue.
- Awaiting Approval Awaiting approval from clerk.
- CMS Committed Requested To be determined by court.
- CMS Committed Recorded in the Court Management System (CMS).
- CMS Validated Filing validated against the Court Management System (CMS).
- **CMS Validation Requested** A technical state in which eFlex is communicating with CourtView, the case management system.
- Filing Complete Filing has been accepted, processed and receipt has been sent.
- Notification Added A technical state in which the eFlex system is identifying the notifications to be sent prior to clerk review.
- Notification Sent A technical state in which the notifications have been added and sent.
- Notification Updated A technical state in which the case information is updated in eFlex and identification of notifications to be sent after clerk review is made.
- On Hold An error condition has occurred that requires the network administrator to resolve. The administrator may address the error and reset the filing to continue through the flow. Occasionally, the administrator may reject the filing. If the administrator rejects a filing after it has been committed to the CMS or DMS, he or she must be sure to clean up both the CMS and the DMS as well as the action queues pertaining to the filing.
- Payment Processed Payment has been charged to filer's credit card or e-check.
- Preprocessing Requested A technical state.
- **Preprocessing Complete** A technical state in which stamping of all documents configured to be stamped occurs.
- **Problem** A technical state in which the eFlex system is generating a rejection notice for a filing the clerk has rejected due to a problem with the filing.

- **Receipt Issued** Receipt sent back to filer.
- **Received** Submission has been received by the court and has been stored.
- Rejected Problem with the filing that is rejected by court.
- CMS Revalidated A technical state.
- **Stored** Information about the filing is being prepared for clerk review but not yet sent.

A clerk does not need to know all of these status conditions in order to complete daily tasks. Most of the time a filing will move through the list of statuses quite quickly so that the user will generally not see most of the process. This list is just for reference. Look at the explanation on the right of the status listed above to know how to respond to a filer's question.

If a submission reached an error condition, the filing goes "On Hold." Under these conditions, an email is sent to the administrator and the monitoring staff notifying them of the condition. Many times this error occurs if there is a glitch in the CMS database, and the administrator can simply reset the status to continue. Resetting the status is an administrative task and is not done by the clerks.

If a user views the status of a submission, and there is no error condition, but after an hour or more it has not changed, contact the eFile administrator and give him/her the Tracking ID.

Filtering Filings Viewed on Filings Page

Note: The checkbox to "Include Responses and Outgoing Notices" at the top of the page is not used by Clerks. These entries in the "Filing Reports" area are automatic responses by the system and do not help the clerk in locating a submission.

 Navigate to the "Filings Report" page by clicking Filings Report on the home page or selecting Filings > Filings Report from the menu bar at the top of any page.

Figure 18: Filing Page Filter Options

Home	Filings	CASEaDia	My Profile	Logout			user: Roxanne Williams	
Filing Repo	ort							
Filings								
MONTGO	OMERY CO	UNTY PRO	BATE					
Status F	Report Crit	teria: 🔲 I	nclude Respons	se and Outgoing Notices				
Filings B	etween: 06	6/17/2016	AND	Status: All		•	Processed By: All	•
Tracking	#:	Filer ID:	Cas	e #:	Filer Name: All		▼ Client #:	
Go	Clear	Search						

- 2. **Optional:** Use the calendar icons to select a start and end date to limit the date range. If the date is left blank, the default is today's date. The larger the date range, the longer the search will take. Use a date range in conjunction with other filters to limit the scope of the search and therefore limit the amount of time taken to complete the search.
- 3. **Optional:** Use the "Status" drop-down, the "Processed By" drop-down, Court, and the "Filer Name" drop-down to further limit the list of filings to be displayed. Utilize these drop-downs individually or in conjunction with each other and with the calendar icons.

Note: The "Filer Name" is the name of the person who submitted the filing and not just the name of a participant on the case.

4. **Optional:** The user may also search for a specific case by tracking number, filing id, case number, or client number by filling in the appropriate field. Using any of the number fields automatically grays out the other search options, limiting the search to the specific information entered.

Figure 19: Filtering by Case Numb

Home	Filings	CASEaDia	My Profile	Logout		user: Roxanne Williams	
Filing Repo	ort						
Filings							
MONTGO	OMERY CO	UNTY PRO	BATE				
Status F	Report Crit	eria: 🗌 I	nclude Respon	ise and Outgoing Notices			
Filings B	etween: 06	/01/2016	AND	Status: All		Processed By: All	•
Tracking	#:	Filer ID:	Cas	se #: 2016MSC00061	Filer Name: All	▼ Client #:	
Go	Clear	Search					

5. After setting the filter parameters, click **Go**, and the "Filings" page will refresh to display cases that meet the search criteria. The filters do not activate unless **Go** is used.

To View Details of a Selected Filing

From the "Filings" list, the user can look at the details of what has happened with a particular filing.

1. On the "Filings" page, click in the checkbox to the left of the listing for the case to be viewed.

Figure 20: Document Links to Filing Details

Fili	ngs									
MON	ITGOMERY	соилт	Y PROBATE							
Stat	us Report (Criteria	: 🔲 Include Re	sponse and Outgoir	ng Notices					
Filing	js Between:		AND	Sta	tus: All Processed By: All	•				
Trac	king #:	Fi	ler ID:	Case #:	Filer Name: All Client #:					
	G0 0	ear Searc	1							
All	Filings Betv	veen O	5/01/2016 and	d today - Numbe	r of Filings: 100					
	Details	Download	1						Filings per page:	50 🔻
	Tracking #	Filer ID	Case #	Status	Document(s)	▼ Official File Stamp	Judge	Processed By	Filer's Name	<u>Client #</u>
	1303	1546		Awaiting Approval	APPLICATION FOR CHANGE OF NAME - ADULT; ENTRY SETTING HEARING	06-17-2016 02:31:14 PM			Harry Beyoglides, Jr.	
	1302	1545		Awaiting Approval	APPLICATION FOR CHANGE OF NAME - ADULT; ENTRY SETTING HEARING	06-17-2016 02:27:50 PM			Harry Beyoglides, Jr.	
	1301	1534	2015MSC00069	Receipt Issued	MOTION	06-16-2016 12:53:09 PM	ARVIN SETH MILLER	RWE	Michael Williams	
	1300	1450		Awaiting Approval	PETITION	06-16-2016 12:33:34 PM			Michael Williams	
	1299	1533	2016MSC00123	Receipt Issued	ENTRY	06-16-2016 12:30:32 PM	DAVID A. WHITE	KMT	David White	
	1298	1532	2016MSC00061	Receipt Issued	WAIVER-OCN	06-16-2016 10:04:32 AM	DAVID A. WHITE	KMT	David Schmidt	

2. Click the **Details** button, and the "Filing Details" for the selected case will appear.

Figure 21: Filing Details

							_				
Home	Filings	CASEaDia M	y Profile Logout				user: R	oxanne Williams			
Filing Report	⇒ Filing I	Details									
Filing											
	_										
Status: Recept Issued											
Tracking #	Filer ID	Case #	Case Title	Status l	Jpdated	Filer's Name	Client #	Approved By			
1299	<u>1533</u>	2016MSC00123	THE CIVIL CASE OF SARA SHANK	06-16-2016	12:31:31 PM	David White		KMT			
				-							
Description		CHANGE OF NAM	E - ADULT	Fili	ng						
Filer:		David White									
Payment M	lethod:	None Specified									
Return add	iresses:	Email: mwilliams@	tybera.com								
Filing Packa	age:	None	typera.net/mcp/clerkreview/runit								
	- j		Description					Document			
ENTRY CON	TINUING	HEARING			balcunas.	ord.pdf					
					1.0 : orig	inal					
					1.1						
-					1.1						
Form					Form.xm						
				Resp	onse			Description			
Docoint			Jeschption		racoint html			Document			
Receipt					receipt.mtm						

- 3. The "Filing" and the "Response" sections are both displayed on the "Filing Details" page. The "Filing" section contains the original documents that were submitted by the filer as well as the file-stamped copy of the documents if the filing has reached a status of "Filed." Click the expansion link next to the document to access the filer's original, non-stamped document.
- 4. To view the original document submitted by the filer, click the link under the "Original Document" column. To view the file-stamped document, click the document listing next to the expansion symbol or the 1.1 link listed under the 1.0 original link.

Note: The "Form.xml" is included for troubleshooting purposes and is usually only used by computer programmers in researching problem solutions.

5. The "Response" section contains the Receipt. The receipt includes filing identification information as well as a record of payment if any was made.

Figure 22: Filing Details - Documents

							_		
lome	Filings	CASEaDia M	y Profile Logout				user: F	Roxanne Williams	_
Filing Report	⇒ Filing I	Details							
Filing									
Description	1: CHAN	GE OF NAME - AD	ULT						
Status:	Recei	pt Issued							
Tracking #	Filer ID	Case #	Case Title	Status	Jpdated	Filer's Name	Client #	Approved By	
1299	<u>1533</u>	2016MSC00123	THE CIVIL CASE OF SARA SHANK	06-16-2016	12:31:31 PM	David White		КМТ	
Description			E - ADULT	Fili	ng				
Filer:		David White							
Payment M	lethod:	None Specified							
Return add	lresses:	Email: mwilliams@	tybera.com						
		Filing: https://go.	tybera.net/mcp/clerkreview/runit						
Filing Packa	age:	None							
			Description					Document	
ENTRY CON	TINUING	HEARING			E <u>balcunas.</u>	ord.pdf		-ile-Stamp	bed Document
		File	er's Original Documen	t ———	🔶 <u>1.0 : ori</u> g	inal			
					1.1				
Form					Form.xm		F	iling and I	Payment Information
				Resp	onse				
		-	Description	Roop	unac ,			Document	
Receipt					receipt.html			2.0000000	
pe									

6. To view the receipt, click on the Receipt link under the "Document" column.

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Figure 23: Viewing a Receipt Document from the Filing Details Page

Confirmation of Receipt									
The following information confirms acceptance of your filing by MONTGOMERY COUNTY PROBATE									
Case Information									
Case Caption	THE CIVIL CASE OF SARA SHANK								
Case Number	2016MSC00123								
Case Type	CHANGE OF NAME - ADULT								
Judge	DAVID A. WHITE								
Court Name	MONTGOMERY COUNTY PROBATE								
Filing Information									
Filer	David White								
Official File Stamp									
Filer Interface Id	1533								
Clerk Interface Id	1299								
Payment Information									
Payment Method	None Specified								
Total Charges	\$5.00								
Documents									
balcunas.ord.pdf	ENTRY CONTINUING HEARING								

7. To return to the "Filings" page from the Filing Details page, click the "Filing Report" link in the breadcrumb trail at the upper left of the page, or to go to another location on the eFlex website, use the menu bar at the top of the page to navigate.

Assigning Filings to a User for Approval

Any time a user is assigning a filing to another user or taking action to approve or reject a filing, that user is working in the "Clerk Review Queue." The majority of a clerk's work is done in the Clerk Review Queue. For an understanding of queues, refer to the "Working with Queues" section of this document.

Most systems are configured so the Administrator and Lead Clerks can assign filings to other clerks.

 Click the Assign Filings button on the Home Page, or select Filings > Assign Filings to a User for Approval from the main menu to display the "Assign Filings to a User for Approval" page.

Figure 24: Assign a Filing to a Clerk

Home Filings	CASEaDia My Profile Logou	t	u	ser: Roxanne Williams			
Assign Filings							
Assign Filing	s to a User for Approval						
MONTGOMERY Assign an Indivi	COUNTY PROBATE dual to Approve Filings						
Assign Selected F	ilings To: 🔹	Note:					
Assign							
				.#			
Refresh					Show	w me filings assigned	to: Everyone 🔻
I tracking #	Case Type	Case Number	Case Title	Document	Assigned To	Judge	▼ Official File Stamp
1303	CHANGE OF NAME - ADULT				Marianne Weikert		06-17-2016 02:31:14 PM
1302	CHANGE OF NAME - ADULT			APPLICATION FOR CHANGE OF NAME - ADULT; ENTRY SETTING HEARING	Dionna Rodgers		06-17-2016 02:27:50 PM
1300	OTHER			PETITION	Danielle Cross		06-16-2016 12:33:34 PM

2. On the right side of the page, just above the list of filings, use the drop-down menu on the "Show me filings assigned to:" option to filter the number of submissions displayed on this page.

Note: A user can display all submissions (Everyone), unassigned submissions (No one), or submissions currently assigned to a specific user.

Figure 25: Filtering Filing Ass	gnments with the Drop-Down Menu
---------------------------------	---------------------------------

	Show	w me filings assigned to	o:	Everyone	•
	Assigned To	<u>Judge</u>		Everyone No one	
HEARING	Marianne Weikert		0	AUTO APPROVER	
HEARING	Dionna Rodgers		0	Beth W. Ferrari	
	Danielle Cross		0	Danielle Cross	
	Dionna Rodgers	ARVIN SETH MILLER	0	Ginger F. Heuker	
	Jayme Robinson	JOSEPH GALLAGHER	0	Jayme Robinson Karen Tincher	
	Danielle Cross	JOSEPH GALLAGHER	0	Lisa Williams	
	Stacy Coleman	JOSEPH GALLAGHER	0	Loukia Lashley Marianne Weikert	
	Dionna Rodgers	JOSEPH GALLAGHER	0	Nicki K. Jackson	
	Danielle Cross	DAVID A. WHITE	0	Rocnelle Garner Rosemary J. Smith Roxanne Williams Shawnieka Pope Stacy M. Coleman	

3. Click **Refresh** and a new list fitting the search parameters will appear.

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Figure 26: Refresh Button Activates Search Parameters

Home	Filings	CASEaDia My Profile	Logout		user:	Roxanne Williams		
Assign F	ilings							
Assig	n Filing	s to a User for Appro	val					
MONT	GOMERY an Indivi	COUNTY PROBATE						
Assign	Selected	ilings To:	• N	ote:				
Ass	ign							
_								
Refr	esh					Show	v me filings assigned to	Danielle Cross 🔹
I	Tracking #	Case Type	Case Number	Case Title	Document	Assigned To	Judge	▼ Official File Stamp
	<u>1300</u>	OTHER			PETITION	Danielle Cross		06-16-2016 12:33:34 PM
	<u>1274</u>	ADULT PROTECTIVE SERVICES	2016MSC00040	THE CIVIL CASE OF ELLA CHANCELLOR	± COPY OF	Danielle Cross	JOSEPH GALLAGHER	06-13-2016 09:24:42 AM
	<u>1268</u>	CHANGE OF NAME - ADULT	2016MSC00050	THE CIVIL CASE OF TABATHA SMART	■ AFFIDAVIT	Danielle Cross	DAVID A. WHITE	06-09-2016 02:48:28 PM

- 4. **Optional:** Click on the column heading links to sort the list of filings by that column type.
- 5. Click in the checkbox to the left of the filing to be assigned or re-assigned. Multiple filings to reassign may be selected at the same time.
- 6. Use the "Assign Selected Filings To:" drop-down menu located at the top left of the page to select a person to assign the filing(s) to.

Note: At the bottom of the drop-down list is "Not Assigned." Selecting "Not Assigned" will remove the assignment on a selected submission previously assigned to a clerk.

Figure	27:	Selecting	an	Individual	for a	Filing	Assignment
0							

Home	Filings	CASEaDia M	ly Profile	Logout		u	ser: Roxanne '	Williams		
Assign F	Filings									
Assig	n Filing	ys to a User fo	r Appro	val						
MONT	GOMERY	COUNTY PROBA	TE							
Assign	an Indivi	dual to Approve	Filings	_						
Assign	Selected I	Filings To Roxann	ne Williams	•	Note:					
Ass	sign 👍		1							
								1		
Refr	resh								Sho	ow me
	Tracking #	Case	Туре	Ca	ase Number	Case Title		Document	Assigned To	
	<u>1303</u>	CHANGE OF NAME	- ADULT					CATION FOR CHANGE OF NAME - ADULT; ENTRY SETTING HEARING	Marianne Weikert	t
	1302	CHANGE OF NAME	- ADULT					CATION FOR CHANGE OF NAME - ADULT; ENTRY SETTING HEARING	Dionna Rodgers	
	<u>1300</u>	OTHER					■ PETIT	ION	Danielle Cross	
	<u>1295</u>	SALE OF REAL EST.	ATE - ESTAT	E <u>201</u>	L5MSC00069	THE CIVIL CASE OF LAURENE ZAPOROZH	TZ 🗉 ADDI	TIONAL DEPOSIT	Dionna Rodgers	AR
	<u>1276</u>	ADULT PROTECTIV	E SERVICES	201	L6MSC00040	THE CIVIL CASE OF ELLA CHANCELLOR	E CERT	IFICATE OF SERVICE	Jayme Robinson	JOS
	174	ADULT PROTECTIV	E SERVICES	201	L6MSC00040	THE CIVIL CASE OF ELLA CHANCELLOR	■ COPY	OF	Danielle Cross	JOS
	<u>1273</u>	ADULT PROTECTIV	E SERVICES	201	L6MSC00040	THE CIVIL CASE OF ELLA CHANCELLOR		AVIT	Stacy Coleman	JOS
	<u>1269</u>	SALE OF REAL EST.	ATE-GUARDI	IANSHIP 201	L6MSC00051	THE CIVIL CASE OF MIRIAM DECKER	± COPY	OF	Dionna Rodgers	305
	<u>1268</u>	CHANGE OF NAME	- ADULT	201	L6MSC00050	THE CIVIL CASE OF TABATHA SMART	• AFFID	AVIT	Danielle Cross	DA

- 7. Click **Assign** to save changes and refresh the "Assign Filings to a User for Approval" page.
- 8. **Optional:** Any information recorded in the "Note to Clerk" box will appear in the clerk note history field on the Approve Filing page.
- 9. **Optional:** Clicking on the "Tracking ID" link causes the "Approve Filing" page for the selected filing to appear.

Figure 28: Tracking # Link Opens Approve Filing Page

Home Filin	gs CASEaDia	My Profile	Logout			user: Roxanne Williams
Assign Filings						
Assign Fili MONTGOMER	ngs to a User y county pro	for Appr BATE	oval			
Assign an Ind	ividual to Approv	ve Filings				
Assign Selecte	d Filings To: Rox	anne Williams	; •	Note:		
Assign						
						.tt.
Refresh						
I <u>Tracking</u>	<u># C</u>	ase Type		Case Number	Case Tit	le
<u>1303</u>	CHANGE OF NA	ME - ADULT				
<u>1302</u>	CHANGE OF NA	ME - ADULT				
<u>1300</u>	OTHER					

10. **Optional:** Clicking on the "Case Number" link causes a secondary page to open and the "Case History" for the selected case to display.

Home	Filings	CASEaDia	My Profile	Logout			user: Roxanne Williams
Assign F Assig MONT Assign	Filings gn Filing GOMERY an Indivi	gs to a User COUNTY PRO	for Appro BATE ve Filings	oval			
Assiar	Selected	Filinas To: Rox	anne Williams	•	Note:		
As	resh						
	Tracking #	<u>C</u>	ase Type		Case Number	Case Title	
	<u>1303</u>	CHANGE OF NAM	ME - ADULT				
	<u>1302</u>	CHANGE OF NAM	ME - ADULT				± APPLICATION
	<u>1300</u>	OTHER					
and the second sec							
	<u>1295</u>	SALE OF REAL E	ESTATE - ESTA	TE	2015MSC00069	THE CIVIL CASE OF LAURENE ZAPO	ROZHETZ ADDITIONAL
	<u>1295</u> <u>1276</u>	SALE OF REAL E	estate - esta Tive service	TE S	2015MSC00069 2016MSC00040	THE CIVIL CASE OF LAURENE ZAPO THE CIVIL CASE OF ELLA CHANCELI	OR ■ CERTIFICATE
	1295 1276 1274	SALE OF REAL E ADULT PROTECT	ESTATE - ESTA TIVE SERVICE TIVE SERVICE	TE S S	2015MSC00069 2016MSC00040 2016MSC00040	THE CIVIL CASE OF LAURENE ZAPO THE CIVIL CASE OF ELLA CHANCELI THE CIVIL CASE OF ELLA CHANCELI	OR E COPY OF

Figure 29: Case Number Link Opens Full Case History

11. To navigate to another location on the eFlex system, use the menu bar at the top of the page.

Approve Filings

Whereas a "Lead Clerk" generally is configured to assign filings, both "Lead Clerks" and "Clerks" have role permissions allowing them to access the Approve Filings queue.

Any time a user is assigning a filing to another user or taking action to approve or reject a filing, that user is working in the "Clerk Review Queue." The majority of a clerk's work is done in the Clerk Review Queue. For an understanding of queues, refer to the "Working with Queues" section of this document.

Understanding Filings Awaiting Approval

 Click Approve Filings on the home page or select Filings > Approve Filings from the menu. This will display the "Filings Awaiting Approval" page.

Figure 30: Filings Awaiting Approval

He	ome	Filings	CASEaDia My Profile Logout		US	er: Roxanne Williams			
Home => Approve Filings									
Filings Awaiting Approval MONTGOMERY COUNTY PROBATE Filings Awaiting Approval Review and Approve Fing Detais									
	Refr	resh					Sho	w me filings assigned to	Everyone 🔻
	1	Tracking #	Case Type	Case Number	Case Title	Document	Assigned To	Judge	▼ Official File Stamp
[1303	CHANGE OF NAME - ADULT			■ APPLICATION FOR CHANGE OF NAME - ADULT; ENTRY SETTING HEARING	Marianne Weikert		06-17-2016 02:31:14 PM
1	1	1302	CHANGE OF NAME - ADULT			APPLICATION FOR CHANGE OF NAME - ADULT; ENTRY SETTING HEARING	Dionna Rodgers		06-17-2016 02:27:50 PM
		1300	OTHER			PETITION	Danielle Cross		06-16-2016 12:33:34 PM
[1	1295	SALE OF REAL ESTATE - ESTATE	2015MSC00069	THE CIVIL CASE OF LAURENE ZAPOROZHE	TZ ADDITIONAL DEPOSIT	Dionna Rodgers	ARVIN SETH MILLER	06-15-2016 05:43:17 PM
		<u>1276</u>	ADULT PROTECTIVE SERVICES	2016MSC00040	THE CIVIL CASE OF ELLA CHANCELLOR	E CERTIFICATE OF SERVICE	Jayme Robinson	JOSEPH GALLAGHER	06-13-2016 09:26:19 AM

- 2. **Optional:** The list of filings displayed can be sorted by using the column heading links. The following provides a description of the features of each column.
 - ! Red exclamation: This column is used for a variety of symbols indicating a special situation. For instance, a red asterisk may appear and indicates an error.
 - **Tracking #**: This is a tracking number assigned to the submission when it enters the Court Review Interface. Clicking on this link will take you to the Review page to approve the submission. (Filings may also have a Filer ID number assigned during creation in the Filer Interface.)
 - **Case Type**: The type of case being submitted.
 - **Case Number:** This is the case number assigned by the CMS that links to the case history. A case number in this field indicates the filing is for an already existing case. A blank in this field indicates the filing is to initiate a case.
 - Case Title: This is the name of the case. Case initiation filings will be blank.
 - **Document**: The list of documents included in the submission. By default, unless the system administrator has configured priorities assigned to document types, the first document type the filer uploaded appears listed next to the expansion link. Click the link to view all documents included in the submission.
 - Assigned To: The assigned clerk if there is one.
 - Judge: The judge assigned to the case, if any.
 - Official File Stamp: The date and time the submission reached the court server, which is not to be confused with the approved time and date.
| Home Filings CASEaDia My Profile Logo | ut | user: Roxanne Williams | | |
|---------------------------------------|------------------------|---|--------------------------------------|------------------------|
| Home Approve Filings | | | | |
| Filings Awaiting Approval | | | | |
| MONTGOMERY COUNTY PROBATE | | | | |
| Review and Approve Filing Details | | | | |
| Refresh | | | Show me filings assigned | to: Everyone 🔹 |
| I Tracking # Case Type | Case Number Case Title | Document | Assigned To Judge | ▼ Official File_Stamp |
| 1303 CHANGE OF NAME - ADULT | | PPLICATION FOR CHANGE OF NAME - ADULT; ENTRY SETTING HEARING | Marianne Weikert | 06-17-2016 02:31:14 PM |
| | | | APPLICANT INFORMATION | |
| | | | APPLICATION FOR CHANGE OF NA | ME - ADULT; ENTRY |
| | | | SETTING HEARING | |
| | | | MEMORANDUM | |
| | | | NOTICE OF HEARING ON CHANGE | OF NAME |
| | | | PROPOSED JUDGMENT ENTRY - C | HANGE OF NAME - ADULT |
| | | | PROPOSED MAGISTRATE'S DECIS
ADULT | ION - CHANGE OF NAME - |
| 1302 CHANGE OF NAME - ADULT | | ■ APPLICATION FOR CHANGE OF NAME - ADULT; ENTRY SETTING HEARING | Dionna Rodgers | 06-17-2016 02:27:50 PM |

Figure 31: Links to Case Documents from Filings Awaiting Approval Page

Note: When the user is on the Filings Awaiting Approval page, the system does not automatically update the screen when new filings are assigned to them. To see the most recent list, click **Refresh**. (Returning to the Filings Awaiting Approval page after completing an approval on the Approve Filings page, will also effect a page refresh and cause new filing assignments to appear on the list.)

3. Select the case to work on by clicking in the checkbox to the left, and clicking the **Details** button located at the top or bottom of the "Filings Awaiting Approval" page. This will direct the user to the "Filing Details" for the selected case.

Home	Filing	s CASEaDia	My Profile Log	jout		u	er: Roxanne	Williams					
Home :	Approve	Filings											
Filin	gs Awai	ting Approv	val										
MONT	GOMERY	COUNTY PRO	BATE										
Filing	s Awaitin	g Approval											
Review	w and Approv	ve Filing Deta	ais										
Ref	resh										Sho	w me filings assigned to	Everyone •
1	Tracking #	<u>c</u>	ase Type	Case Number		Case Title			Document		Assigned To	Judge	▼ Official File Stamp
	<u>1303</u>	CHANGE OF NAM	ME - ADULT				APPL	CATION FOR C	HANGE OF NAME - ADULT; ENTRY SETTING H	IEARING	Marianne Weikert		06-17-2016 02:31:14 PM
	<u>1302</u>	CHANGE OF NAM	ME - ADULT					CATION FOR C	HANGE OF NAME - ADULT; ENTRY SETTING H	IEARING	Dionna Rodgers		06-17-2016 02:27:50 PM
	<u>1300</u>	OTHER						ION			Danielle Cross		06-16-2016 12:33:34 PM
	1295	SALE OF REAL E	STATE - ESTATE	2015MSC00069	THE CIVIL CASE	OF LAURENE ZAPOROZHE	TZ 🗄 ADDI	TONAL DEPOS	Π ~~~~~~		Dionna Rodgers	ARVIN SETH MILLER	06-15-2016 05:43:17 PM
	1276	ADULT PROTEC	TIVE SERVICES	2016MSC00040	THE CIVIL CASE	OF ELLA CHANCELLOR	■ CERT	FICATE OF SE	RVICE		Jayme Robinson	JOSEPH GALLAGHER	06-13-2016 09:26:19 AM
	<u>1274</u>	ADULT PROTEC	TIVESERVICES	2016MSC00040	THE CIVIL CASE	OF ELLA CHANCELLOR	E COP	OF			Danielle Cross	JOSEPH GALLAGHER	06-13-2016 09:24:42 AM
	<u>1273</u>	ADULT PROTEC	TVE SERVICES	2016MSC00040	THE CIVIL CASE (OF ELLA CHANCELLOR		AVIT			Stacy Coleman	JOSEPH GALLAGHER	06-13-2016 09:24:05 AM
	Hon	ie Filings	CASEaDia My	Profile Logout				user: Roxanne	Villams				
	Hon	<u>ne</u> ⇒ <u>Approve Filin</u>	igs ⇒ Filing Details										
	Fil	ing 🖌											
	De	scription: ADUL atus: Awaiti	T PROTECTIVE SER	VICES									
			0 #	0 TH		Charles Hadabad	Classic He	ot-state					
	12	76 1501	Case # 2016MSC00040	THE CIVIL CASE OF FLL		06-13-2016 09:26:35 AM	Filer s Na	iani					
		1001	2010/10/2000 10		- Chronellon	00 10 2010 0012010071	Courtering						
						Fling							
	De	scription:	ADULT PROTECTIV	E SERVICES									
	Pa	yment Method:	Filer Requested Fee	Waiver/Deferral: Waiv	er/Exempt								
	Re	turn addresses:	Fling: https://go.ty	/bera.com /bera.net/mcp/clerkrev	iew/runit								
	Fili	ng Package:	None	scription				Docum	ant				
	CE	RTIFICATE OF SE	RVICE			8 0 Citation	o Survivin	Spouse to	xcercise Elective.pdf				
	For	m				Form.xml							
									· · · · · · · · · · · · · · · · · · ·				

Figure 32: Filing Details

4. After viewing the filing details for the selected case as described in the section "To View Details of a Selected Filing," click the "Approve Filing" link in the breadcrumb trail at the upper left of the page to return to the "Filings Awaiting Approval" page.

Figure 33: Bread Crumb Trail Navigation in Upper Left

 $\frac{\text{Home}}{\text{Home}} \Rightarrow \frac{\text{Approve Filings}}{\text{Home}} \Rightarrow \text{Filing Details}$

5. On the "Filings Awaiting Approval" page, select the case with to work on by clicking in the checkbox to the left and clicking the **Review and Approve Filing** button. This will direct the user to the "Approve Filing" page for the selected case. Alternately, click an entry under the "Tracking ID" column to display the Approve Filing page.

Figure 34: Approve Filing Page

Ann	rov	e Filino					-
трр		c r mug					
Note	e Fro	m Filer:	None				
Note	e His	tory: None	s None				
NOU	. 115	tory: Nork					
Filer: H	HARR	Y BEYOGLII	DES, JR. Organization: HARRY BEYOGLIDES, JR.				
Case	е Тур	e: CHAN	GE OF NAME - ADULT				
Tracki	ing #	Ca	ise No. Case Title Submitted By Filed Date Case History	1			
1303			HARRY BEYOGLIDES, JR. 06-17-2016 02:31:14 PM Refresh)			
View	Page	Pages Of	Document Type	Additional Docket Text	Edit Data	On Behalf Of	Sign
	ruge	Recording	Form Data	Case Data collected from filer			oign
	2	0	MSC_21.0- : APPLICATION FOR CHANGE OF NAME - ADULT; ENTRY SETTING HEARING			SHARON OSBORNE: Applicant 💌	1
	1	0	MSC_21.5 : NOTICE OF HEARING ON CHANGE OF NAME			SHARON OSBORNE: Applicant	
	1	0	MSC_MEM : MEMORANDUM			SHARON OSBORNE: Applicant -	1
	1	0	MSC 5F.1 : APPLICANT INFORMATION			SHARON OSBORNE: Applicant	
	1	0	PROP. MSC. 21.1.1 : PROPOSED MAGISTRATE'S DECISION - CHANGE OF NAME - ADULT			CHADON OCRODNE: Applicant	1
	1	0					
	-	U				SHAKUN USBURNE: Applicant	
Canad							
Post	To Q	vieues: (o	(Changing Document Type codes may change queue routing)	▼ add			
n L L	Jubi	1551011 60.					
Delet	e MCI	Name Chan	qe Publication Queue System				
	MC	Mag Standa	rd-Queue System				
	MC	Mag Judicial	-Queue System				
	MC.	Judge Judic	ial-Queue System				
Note	to C	lerk/Cour	t Staff: Select: 🔹				
				.a.			
Note	to F	iler:	Select:				
				.tt			
Actio	n:	Appro	ve 🔘 Reject 🔍 Reassign To:				
Appr	ove/R	eject/Reassig	n j				

6. On the "Filings Awaiting Approval" page, click the link in the "Case Number" column to launch a separate tab or window to display the case history.

Figure 35: Case History

MONT	2016MSC00050 : GOMERY COUNTY PROBATE CO	URT
Case Number 2016MSC00050 Case Type CHANGE OF NAME - ADULT Opened 03-28-2016 Status O	PlaintiffTABATHADefendantJudge/MagistrateDAVID A.Amt. of Claim\$.00Jury/Non JuryNon Jury	MARIE SMART WHITE
Show/Hide Participants Applicant[s]		Counsel of Record
TABATHA MARIE SMART 1 STATE STREET DAYTON, OH 45402	DAVID R. SCHMIDT 1200 EAST DOROTHY LANE DAYTON, OH 45419 (937)299-1895 DAVE@SCHMIDTDAYTON.C	ом
Magistrate[s]		Counsel of Record
DAVID A. WHITE WHITED@MCOHIO.ORG		
File Date	Case History	
03-28-2016 APPLICATION CHANGE OF NAME - ADULT; ENTRY SE 03-28-2016 NOTICE OF HEARING ON CHANGE OF NAME 03-28-2016 MAGISTRATE'S DECISION - CHANGE OF NAME OF AN 03-28-2016 JUDGMENT ENTRY CHANGE OF NAME - ADULT 03-28-2016 WAIVER-OCN	TING HEARING ADULT	

Understanding the Approve Filing Page

This section of the Clerk Review Guide will cover the functionality available to the clerk on the Approve Filing Page. The appropriate use of the page's functionality will be determined by factors relevant to individual submissions such as new case, existing case, or case type. Montgomery Probate procedures are available on separate "cheat sheets" and are dependent upon the above factors.

1. Click **Approve Filings** on the home page or select **Filings** > **Approve Filings** from the menu. This will display the "Filings Awaiting Approval" page.

40

Figure 36: Filings Awaiting Approval Page

Hor	ne	Filings	CASEaDia My Profile Logout		use	r: Roxanne Williams			
Hon	<u>ne</u> ⇒ A	Approve F	lings						
Fil MO Fili	ings NTGC ngs A	Await	ing Approval COUNTY PROBATE Approval						
Re	view al	nu Approve	Pling Decais						
	Refrest	h					Sho	w me filings assigned to	Everyone
	! <u>n</u>	racking #	Case Type	Case Number	Case Title	Document	Assigned To	Judge	▼ Official File Stamp
	1	1303	CHANGE OF NAME - ADULT				Marianne Weikert		06-17-2016 02:31:14 PM
	1	1302	CHANGE OF NAME - ADULT			APPLICATION FOR CHANGE OF NAME - ADULT; ENTRY SETTING HEARING	Dionna Rodgers		06-17-2016 02:27:50 PM
	1	1300	OTHER			PETITION	Danielle Cross		06-16-2016 12:33:34 PM
	1	1295	SALE OF REAL ESTATE - ESTATE	2015MSC00069	THE CIVIL CASE OF LAURENE ZAPOROZHET	Z ADDITIONAL DEPOSIT	Dionna Rodgers	ARVIN SETH MILLER	06-15-2016 05:43:17 PM
	1	1276	ADULT PROTECTIVE SERVICES	2016MSC00040	THE CIVIL CASE OF ELLA CHANCELLOR		Jayme Robinson	JOSEPH GALLAGHER	06-13-2016 09:26:19 AM

2. Click an entry under the "Tracking ID" column to display the "Approve Filing" page. Alternately, select the checkbox to the left of the entry to work on, and click the **Review and Approve Filing** button.

Figure 37: Approve Filing

ripprove r ming						_
Note From Filer: None Note(s) from Court: None						
Note History: None						
,						
Filer: HARRY BEYOGLIDES, JR. Orga	nization: HARRY BEYOGLIDES, JR.					
Case Type: CHANGE OF NAME -	ADULT					
Tracking # Case No.	Case Title Submitted By	Filed Date Case Histo	ry .			
1303	HARRY BEYOGLIDES, JR. 0	6-17-2016 02:31:14 PM				
View Pages Of	Document Typ	e	Additional Docket Text	Edit Data	On Behalf Of	Signa
Form Data			Case Data collected from filer			
2 0 [™] MSC_21.0	- : APPLICATION FOR CHANGE OF NAM	E - ADULT; ENTRY SETTING HEARIN	G		SHARON OSBORNE: Applicant 💌]
■ 1 0 SC_21.5	: NOTICE OF HEARING ON CHANGE O	F NAME			SHARON OSBORNE: Applicant -]
1 0 ☑ MSC_MEN	I : MEMORANDUM				SHARON OSBORNE: Applicant •]
1 0 ■ MSC_5F.1	: APPLICANT INFORMATION				SHARON OSBORNE: Applicant 💌	
1 0	C_21.1.1 : PROPOSED MAGISTRATE'S	DECISION - CHANGE OF NAME - ADU	ILT		SHARON OSBORNE: Applicant 🔻	
1 0 PROP_MS	C_21.1- : PROPOSED JUDGMENT ENTI	RY - CHANGE OF NAME - ADULT			SHARON OSBORNE: Applicant -	
Send To Queues: (optional)	Update (Changing Document Type code:	; may change queue routing)				
Post Submission to:	✓ for review on:	Assign to:	▼Add			
Delete Queue	For Review On Assign To Origin	ation				
MCName Change Publication	Queue Syste	m				
MCMag Standard-Queue	Syste	m				
MCMag Standard-Queue MCMag Judicial-Queue	Syste Syste	m m				
MCMag Standard-Queue MCMag Judicial-Queue MCJudge Judicial-Queue	Syste Syste	m m m				
MCMag Standard-Queue MCMag Judicial-Queue MCJudge Judicial-Queue	Syste Syste	m m m				
MCMag Standard-Queue MCMag Judical-Queue MCJudge Judical-Queue MCJudge Judical-Queue	Syste Syste Select:	" m m ▼				
MCMag Standard-Queue MCMag Judicial-Queue MCJudge Judicial-Queue MCJudge Judicial-Queue	Syste Syste Select:	" m m 				
MCMag Standard-Queue MCMag Judicial-Queue MCJudge Judicial-Queue MCJudge Judicial-Queue	Syste Syste Select:	" m m				
MCMag Standard-Queue MCMag Judical-Queue MCJudge Judical-Queue Note to Clerk/Court Staff:	Syste Syste Select: Select:	" m m •	łł			
MCMag Standard-Queue MCMag Judical-Queue MCJudge Judical-Queue Note to Clerk/Court Staff:	Syste Syste Select: Select:		.4			
MCMag Standard-Queue MCMag Judicial-Queue MCJudge Judicial-Queue Note to Clerk/Court Staff:	Syste Syste Select:					
MCMag Standard-Queue MCMag Judicial-Queue MCJudge Judicial-Queue Note to Clerk/Court Staff: Note to Filer:	Syste Syste Select: Select:		.t. .t.			
MCMag Standard-Queue MCMag Judicial-Queue MCJudge Judicial-Queue Note to Clerk/Court Staff:	syste Syste Select: Select:	" " " " " " " " " " " " " " " " " " "	.H.			
MCMag Standard-Queue MCMag Judical-Queue MCJudge Judical-Queue Note to Clerk/Court Staff: Note to Filer: Action: © Approve © Rejee	syste Syste Select: Select: Ct © Reassign To:	"" " " " " " " " " " " " " " " " " " "	.H.			

The "Approve Filing" screen has several sections, and appears the same for both a filing to an existing case and a filing initiating a case, with the exception that a case number will display for an existing case

and a case initiation will have both an empty text field for the case number as well as a refresh button under the Case History column.

Figure 38: Notes Section

Home	Filings	CASEaDia	My Profile	Logout	user: Roxanne Williams
<u>Home</u> ⇒	Approve Filing	<u>is</u> ⇒ Approv	e Filing		
Appro	ove Filing	ļ			
Note F	rom Filer:	I am not	an attorney so	please let me know if I need to do something else. Thank you.	
Note(s) from Cour	t: None			
Note H	listory: Non	2			

• Note Section (Filer, Court, and History): This section includes any notes the filer may have included, any notes from the clerk, and a notes history that would display a summary of all notes added for this case.

The second section includes case identification information such as the filer's name and the case type. Further information is listed under the following column headings:

- Filer: This is the name of the individual who submitted the filing.
- Organization: This is the name of the law firm or organization to which the filer belongs.
- **Case Type**: The type of case being submitted. This field is populated by what the filer selected and what the clerk entered when the case was created in ProWare.

Figure 39: Case Type Information



- **Tracking #:** This is a tracking number assigned to the submission by the Court Review Interface. It is mainly used when researching submissions. It is a different number than the Filing ID number assigned by the Filer Interface. Some filings, such as orders, originate in the Clerk Review instead of the Filer Interface so there is a need for two different ID numbers.
- **Case No.**: For a filing to an existing case, the case number will be displayed. A filing to initiate a case will have a blank text field and will not receive a case number until the filing case has been initiated in ProWare and the **Refresh** button has been activated. eFlex will communicate with the CMS, which will send that number to eFlex.
- **Case Title**: For existing cases, the title will display as it was entered when it was created in ProWare.
- Submitted By: The name of the individual who submitted the filing.
- Filed Date: The date and time the submission reached the court server, not to be confused with the approved time and date.
- **Case History**: The **Refresh** button that appears in this column on case initiation filings is only active BEFORE it has been clicked. Once the clerk creates the case in ProWare, the clerk will return to eFlex and click the **Refresh** button to cause eFlex to communicate with ProWare to pull over case information.

The third section provides information about the submission. This section includes the following column headers:

Figure 40: Submission Information

		Filings	CASEaDia My Profile	Logout			user: Roxanne Williams			
<u>Home</u>	; ⇒ Ap	prove Filing	<u>is</u> ⇒ Approve Filing							
Арр	orov	e Filing								
Not	e Fro	m Filer:	None							
Not		from Cour	t: None							
Not	e His	tory: Non	2							
Filer: I	HARR	Y BEYOGLI	DES, JR. Organization: HAR	RRY BEYOGLIDES, JR.						
Case	е Тур	e: CHAN	ge of NAME - ADULT							
Track	ting #	C	ase No. Case Title	Submitted By	Filed Date	Case History				
1303	ļ.		H	ARRY BEYOGLIDES, JR.	06-17-2016 02:31:14 PM	Refresh				
		Pages Of								
View	Page	^s Recording		Document Ty	rpe		Additional Docket Text	Edit Data	On Behalf Of	Signature
	2									
							Case Data collected from filer			
	-	0	MSC_21.0- : APPLICAT	TION FOR CHANGE OF NA	ME - ADULT; ENTRY SETT	TING HEARING	Case Data collected from filer		SHARON OSBORNE: Applicant 🔻	
	1	0	MSC_21.0- : APPLICAT	TION FOR CHANGE OF NA	ME - ADULT; ENTRY SETT OF NAME	TING HEARING	Case Data collected from filer		SHARON OSBORNE:Applicant SHARON OSBORNE:Applicant	
	1	0 0 0	MSC_21.0- : APPLICAT MSC_21.5 : NOTICE O MSC_MEM : MEMORAN	tion for change of NA F hearing on change Idum	ME - ADULT; ENTRY SETT OF NAME	TING HEARING	Case Data collected from filer		SHARON OSBORNE:Applicant SHARON OSBORNE:Applicant SHARON OSBORNE:Applicant	
	1 1 1	0 0 0 0	MSC_21.0- : APPLICAT MSC_21.5 : NOTICE O MSC_MEM : MEMORAN MSC_SF.1 : APPLICAN	TION FOR CHANGE OF NA F HEARING ON CHANGE IDUM T INFORMATION	ME - ADULT; ENTRY SETT OF NAME	TING HEARING	Case Data collected from filer		SHARON OSBORNE:Applicant SHARON OSBORNE:Applicant SHARON OSBORNE:Applicant SHARON OSBORNE:Applicant	
	1 1 1 1	0 0 0 0 0	MSC_21.0 - : APPLICAT MSC_21.5 : NOTICE O MSC_MEM : MEMORAN MSC_5F.1 : APPLICAN PROP_MSC_21.1.1 : P	TION FOR CHANGE OF NA F HEARING ON CHANGE IDUM T INFORMATION ROPOSED MAGISTRATE	ME - ADULT; ENTRY SETT OF NAME S DECISION - CHANGE OF	TING HEARING NAME - ADULT	Case Data collected from filer		SHARON OSBORNE:Applicant SHARON OSBORNE:Applic	

- View: Depending on which internet browser is being used and what its configuration is, clicking on each icon either downloads the associated document or opens it in a new tab for review and printing.
- Pages: The length of the document.
- **Pages of Recording:** The number of pages over the court-set limit. Additional pages will incur additional fees.
- **Document Type:** Identifies the document filed.
- Additional Docket Text: A brief description of the document the filer may have entered. This information is entered by the filer, can be edited by the clerk, is stored in the CMS, and is viewable in the case history entry.
- Edit Data: Clicking on these icons displays the various forms the filer used to enter the coversheet data or data specific to the document submitted. For case initiation, the edit data icon allows the clerk to view the parties that the filer added for the submission. An edit icon will allow the clerk to add to or modify information when appropriate.
- **On Behalf of:** The individual on whose behalf the filing was submitted is selected by the filer and can be edited in Clerk Review when appropriate.
- **Signature:** On a case initiation filing, if the signature field is populated prior to a case number being assigned, it indicates the Magistrate has completed his or her work on the filing prior to the case being initiated in ProWare.

Note: In the "View" column, an icon next to a listing of "Form Data" is computer code used by the system administrator or the system developers for troubleshooting purposes. Do not click on a view icon next to a "Form Data" listing.



nome	Filings	CASEaDia	My Profile	Logout			user: Roxanne Williams				
<u>Home</u> ⇒ Į	Approve Filings	s ⇒ Approve	Filing								
Appro	ve Filing										
Note Fr	rom Filer:	None									
Note(s)) from Court	: None									
Note H	istory: None	1									
Case Ty Tracking	ype: CHANG # Ca	E OF NAME -	ADULT Case Title	Submitted By	Filed Date	Case History					
			-		06.17.0016.00:01:14.00						
1303			ł	HARRY BEYOGLIDES, JR.	06-17-2016 02:31:14 PM	Refresh					
1303 View Pag	Pages Of Recording		, r	Document T	06-17-2016 02:31:14 PM	Ketresh	Additio	nal Docket Text	Edit Data	On Behalf Of	Signatu
1303 View Pag	Pages Of Recording	Form Data		Document T	ов-17-2016 02:31:14 РМ	Kerresn	Additic Case Data colected from	nal Docket Text	Edit Data	On Behalf Of	Signatur

Note: Whereas the clicking the "View" icon to the left of a "Case Data" listing causes computer code to be displayed, clicking the "Edit Data" icon to the right of a "Case Data" listing causes the "Case Initiation" page to display where the clerk can view, add, or delete case participants or make modifications to information provided by the filer.

The next section of the "Approve Filing" page includes multiple lines that deal with the fees. The following headings are included:

Figure 42: Submission Fees



- **Recalculate Fees:** This button must be activated if the clerk opted to change any of the document types included in the submission.
- **Total Fees:** The court fees calculated by the CMS. This amount does not include the technology fee assessed by the online payment gateway.
- **Payment Method:** This identifies the method of payment selected by the filer upon submission of the filing.
- Waiver/Defer Fees: If the filer selected a waiver or deferment, this will display. The dropdown allows the clerk to override the filer's selection if appropriate.
- **Take Payment**: After the clerk has verified the documents, the Take Payment button is clicked and an authorization number will be displayed.
- **Skip Payment**: In order to process the submission and move forward off the page, the clerk must either activate the **Take Payment** button or select the "Skip Payment" check box.

The fifth section of the "Approve Filing" page is "Send to Queues." Some document types may be configured to automatically route to queues. Anything automatically routed to a prequeue will appear in the prequeue prior to appearing in the Filings Awaiting Approval list. This section enables the clerk to route a filing not automatically routed or to add to filing's routing.

Figure 43: Send to Queues

Recalculate Fees			
Total Fees: \$174.00			
Payment Method : Token			
Waive/Defer FeesDO NOT WAIVE/DE	FER FEES V		
Send To Queues: (optional) Update	(Changing Document Type codes may chang	ge queue routing)	
Post Submission to:	▼ for review on:	Assign to:	Add
Delete Queue Fo	or Review On Assign To Origination		
MCName Change Publication Queue	System		
MCMag Standard-Queue	System		
MCMag Judicial-Queue	System		
MCJudge Judicial-Queue	System		
Note to Clerk/Court Staff:	Select:	-	
Note to Filer:	Select:	~	
Action: © Approve © Reject © I	Reassign To:	-]	
Approve/Reject/Reassign			

- **Update:** If document types associated with the submission have been changed, the clerk must activate this button to ensure system-configured queue routing is accurate.
- **Post Submission to:** Allows the clerk to manually select a queue to which the submission will route upon processing.
- For Review on: The clerk uses a calendar pop-up to set a review date, which can influence when the queue entry will be visible by default.
- Assign to: The dropdown is populated with names of individuals who have access to the selected queue.
- Add: MUST be activated to save the manual routing information. Once the Add button has been clicked, the manual queue routing displays at the bottom of the queue routing table.

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Figure 44: Manual Routing to Queue

Post S	Submission to:	MCSteno Transcript	t v	for review on:		Assign to:	Wilma F. Francis	 Add
Delete		Queue	For Review On	Assigned To	Origination			
	MCName Char	nge Publication Queue			System			
	MCMag Standa	ard-Queue			System			
	MCMag Judicia	l-Queue			System			
_	MCJudge Judi	cial-Queue			System			
×	MCSteno Tran	script		Wilma F. Franci	s Custom			

Note: Manually routed queue entries can be deleted by clicking the red "X." System-configured queue routing cannot be deleted. Additionally, when manual queue routing is added that sends a filing back to a Prequeue, the system-configured routing is hidden but is maintained and will display when the submission moves from the Prequeue back to the Clerk Review queue.

The final section of the "Approve Filing" page, allows the clerk to take final action on the submission, including adding appropriate communication to accompany the filing to its next destination.

Figure 45: Approve/Reject/Reassign

Post Sudmission t	o: MCSteno Transcript	•	for review on	:	Assign to:	Wilma F. Francis	•	Add
Delete	Queue	For Review On	Assigned To C	rigination				
MCName C	hange Publication Queue		S	ystem				
MCMag Sta	ndard-Queue		S	ystem				
MCMag Jud	licial-Queue		S	ystem				
MCJudge J	udicial-Queue		S	ystem				
Note to Clerk/C	ourt Staff:		Select:			•		
Note to Clerk/C Note to Filer:	ourt Staff:		Select:					
Note to Clerk/C Note to Filer:	ourt Staff:		Select:		•			

- Note to Clerk: This is a text field where a user can edit a pre-defined note or add his own note. Notes added in this field are viewable in the queue entry if the submission is routed to a prequeue or to queues after approval. A user could also include a note if he is reassigning the filing to another clerk to review and needs to explain why he is making the reassignment.
- Note to Filer: This is a text field where a user can edit a pre-defined note or add his own note. A clerk might want to enter a note to the filer if the submission is rejected.
- **Select Dropdown:** The system has pre-configured notes addressing common issues. The complete note populates the textfield when the description is selected from the dropdown.
- Send: If Prequeue routing has been added, the radio buttons change to include "Send" rather than approve. When selected in conjunction with the "Send" action button, the filing is moved backward into the prequeue until appropriate work is completed and the filing is again sent to the Approve Filing queue.
- Approve: Selecting "Approve" will set the information in the filing to be recorded in the CMS and store the documents electronically. The filing status returned to the filer will be "Filed."

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- **Reject:** Selecting "Reject" will set the information in the filing NOT to be recorded in the CMS, and the documents will NOT be stored electronically. The filing status returned to the filer will be "Rejected."
- **Reassign To:** Selecting this option will set the information in the filing to be posted to another clerk's list of "Filings Awaiting Approval." A note will be added to the note history if a reassignment is made. Generally, the note indicates the user who reassigned the filing.
- Approve/Reject/Reassign Button: This dynamic button changes dependent on the action selection. Adding a prequeue will cause this button to dance to "Send." Clicking the action button will complete the actions selected on this page and either send the filing back to a prequeue, submit the information to the CMS, return a status "Rejected," or reassign the submission to another clerk.

Steps to Approve, Reject, or Reassign a Filing

1. Clicking **Approve Filings** on the home page or selecting **Filings** > **Approve Filings** from the menu bar at the top of any page displays "Filings Awaiting Approval" page.

Figure 46: Filings Awaiting Approval

Home	Filings	CASEaDia My Profile Logo	ut	user	Roxanne Williams			
<u>Home</u> ≓	Approve F	Filings						
Filin	s Await	ting Approval						
MONT	GOMERY	COUNTY PROBATE						
Filinas	Awaiting	Approval						
Review	and Approv	e Filing Details						
Refr	esh					Sho	w me filings assigned to	: Everyone
1	Tacking #	Case Type	Case Number	Case Title	Document	Assigned To	Judge	▼ Official File Stamp
	1304	CHANGE OF NAME - ADULT			■ APPLICATION FOR CHANGE OF NAME - ADULT; ENTRY SETTING HEARING	Roxanne Williams		06-17-2016 05:05:40
	1303	CHANGE OF NAME - ADULT			■ APPLICATION FOR CHANGE OF NAME - ADULT; ENTRY SETTING HEARING	Roxanne Williams		06-17-2016 02:31:14
=/	1302	CHANGE OF NAME - ADULT			■ APPLICATION FOR CHANGE OF NAME - ADULT; ENTRY SETTING HEARING	Dionna Rodgers		06-17-2016 02:27:50
	<u>1300</u>	OTHER			PETITION	Danielle Cross		06-16-2016 12:33:34
	1295	SALE OF REAL ESTATE - ESTATE	2015MSC00069	THE CIVIL CASE OF LAURENE ZAPOROZHETZ	■ ADDITIONAL DEPOSIT	Dionna Rodgers	ARVIN SETH MILLER	06-15-2016 05:43:17 F
	<u>1276</u>	ADULT PROTECTIVE SERVICES	2016MSC00040	THE CIVIL CASE OF ELLA CHANCELLOR		Roxanne Williams	JOSEPH GALLAGHER	06-13-2016 09:26:19
	1274	ADULT PROTECTIVE SERVICES	2016MSC00040	THE CIVIL CASE OF ELLA CHANCELLOR	■ COPY OF	Daniele Cross	JOSEPH GALLAGHER	06-13-2016 09:24:42

 Select the filing to work on by clicking on the link in the "Tracking #" column or by selecting the checkbox to the left of the listing and clicking the **Review and Approve** button. This causes the "Approve Filing" Page to appear.

Note: When a lead clerk selects an entry to view, the submission is automatically assigned to this user if it is not yet assigned. If it is assigned to another person, the user will see both a dialog box with a warning prior to being taken to the "Approve Filing" page as well as a red warning message at the top of

the Approve Filing page. The warnings bring the assignment to the user's attention but will not prevent the user moving forward and processing the filing.

Figure 47: Filing Assigned Dialog Box Warning

This filing is already Home Filings (Home ⇒ Approve Filings	assigned to Danielle Cross	s. Continue? Cancel		user:	Roxanne Williams_		
Approve Filing Danielle Cross is currentl Note From Filer:	v assigned to approve this fili	ing. Concurrent editing or approv	ving of this filing may res	ult in bad d	ata being entered into I	Proware	
Approve Filing Danielle Cross is current Note From Filer:	r assigned to approve this fill. None	ing. Concurrent editing or approv	ving of this filing may res	ult in bad d	ata being entered into I	Proware	
Approve Filing Danielle Cross is current Note From Filer: Note(s) from Court: Note History: None	y assigned to approve this fili None None	ing. Concurrent editing or approx	ving of this filing may res	ult in bad d	ata being entered into l	Proware	
Approve Filing Danielle Cross is current Note From Filer: Note(s) from Court: Note(s) from Court: Note History: None Filer: LAURA MARIANI O Case Type: ADULT F	y assigned to approve this fill None None ganization: ADULT PROTECT: ROTECTIVE SERVICES	ng. Concurrent editing or approv	ving of this filing may res	ult in bad d	ata being entered into i	Proware	
Approve Filing Danielle Cross is current Note From Filer: Note(s) from Court: Note History: None Filer: LAURA MARIANI O Case Type: ADULT F Tracking # Case No.	y assigned to approve this fili None None ganization: ADULT PROTECT. ROTECTIVE SERVICES	ing. Concurrent editing or approx IVE SERVICES Submitted By	ving of this filing may res	case Histo	ata being entered into I	Proware	
Approve Filing Danielle Cross is current Note From Filer: Note(s) from Court: Note History: None Her: LAURA MARIANI O Case Type: ADULT F Tracking # Case No. 1274 2016MSC000	y assigned to approve this fill None None ganization: ADULT PROTECT: ROTECTIVE SERVICES Case Title 40 THE CIVIL CASE OF ELLA	ng. Concurrent editing or approv IVE SERVICES Submitted By CHANCELLOR LAURA MARIANI 0	ving of this filing may res Filed Date 16-13-2016 09:24:42 AM	Case Histo Refresh	ata being entered into i into i	Proware	
Approve Filing Danielle Cross is current Note From Filer: Note(s) from Court: Note History: None Filer: LAURA MARIANI O Case Type: ADULT F Tracking # Case No. 1274 2016MSCOOR	y assigned to approve this fill None None ganization: ADULT PROTECT: ROTECTIVE SERVICES Case Title 40 THE CIVIL CASE OF ELLA Document Type	ING. Concurrent editing or approv TVE SERVICES Submitted By CHANCELLOR LAURA MARIANI 0 Additional Docket	Filed Date Filed Date 16-13-2016 09:24:42 AM	Case Histo Refresh dit Data	ny On Be	Proware	Sigr

Approve Filing: Reviewing Documents Associated with Submission

1. On the listing for "Case Data collected from filer," click on the icon in the "Edit Data" column to the far right. A "Case Initiation" page will appear with the information entered by the filer.

Figure 48: Edit Data on Case Data Collected From Filer

Home	Filings CASEaDia	My Profile	Logout			user: Roxanne Williams			
<u>Home</u> ⇒ <u>A</u>	pprove Filings ⇒ Approve I	Filing							
Approv	ve Filing								
11									
Note Fro	om Filer: None								
Note(s)	from Court: None								
NOLE HE	story: None								
Filer: HARF	RY BEYOGLIDES, JR. Orga	nization: HAR	RY BEYOGLIDES, JR.						
Case Ty	pe: CHANGE OF NAME -	ADULT							
Tracking #	t Case No	Case Title	Submitted By	Filed Date	Case History				
1303		Н	ARRY BEYOGLIDES, JR. (06-17-2016 02:31:14 PM	Refresh				
View Page	Pages Of Recording		Document Ty	pe		Additional Docket Text	Edit Data	On Behalf Of	Signatu
	Form Data					Case Data collected from filer			
2	0 SC_21.0	- : APPLICAT	ION FOR CHANGE OF NAI	ME - ADULT; ENTRY SETT	ING HEARING			SHARON OSBORNE: Applicant 💌	
1	0 🕅 MSC 21 5		F HEARING ON CHANGE O	F NAME					
lome	Filings CASEaDia	My Profile	Logout			user: Roxanne Williams			
<u>Home</u> ⇒ A	Approve Filings => Approve	Filing => Case	Initiation						
Case II	nitiation: CHANG	FOFN	AME - ADULT	1					
Cube II			init incent						
Client #									
Case Par	rticipants								
Remove		Participant I	Name	Applicant	be	Attorney/Agent for Party BEVOCITES			
	EL STAKON OSBORINE			Appicant		berodebes			
Back	: Next								
_		_							_

- 2. Review the information listed on the "Case Initiation" page, including clicking on the name links to check address information and make modifications as necessary.
- 3. The action buttons displayed above the table allow the clerk the ability to add parties to the filing or to edit information already added. Each button will open an "Add Party" page with a dropdown list of roles pertaining to the category indicated on the activated button. Additional fields allow further identifying information to be entered or corrected. If any additions or corrections are made, the **Save** button at the bottom of the "Add a Party" page must be activated to record the new information and return the clerk to the "Case Initiation" page.
- 4. Click **Next** to save changes and return to the "Approve Filing" page. Click **Back** to return to the "Approve Filing" page without making any changes to the original case data.
- 5. For each listing under the "Document Type" column, click the corresponding icon in the "View" column to the left of the listing. Depending on the configuration of the internet browser used, clicking the document link either causes a dialog box to appear or the document to open in a separate window.

Figure 49: View Icon Dialog Box for Docket Listing

The The	lings CASEaDia	My Profile	Logout			user: Roxanne Williams			
ome ⇒ Appro	ove Filings ⇒ Appro	ve Filing							
Approve I	Filing			View	Pages Pages	of	Document Ty	уре	
Note From J	Filer: None				Recon	Form Data			
Note(s) from	m Court: None y: None				2 0	MSC_21.0- : APPLICATION FO	R CHANGE OF NA	AME - ADU	
					1 0	MSC 21.5 : NOTICE OF HEARI	ING ON CHANGE	OF NAME	
Filer: HARRY B	EYOGLIDES, JR. O	rganization: HAF	RY BEYOGLIDES, JR.		÷				
Filer: HARRY B Case Type: Tracking #	CHANGE OF NAME CHANGE OF NAME Case No.	rganization: HAF E - ADULT Case Jine	Submitted By	Filed Date	Case History				
Fler: HARRY B Case Type: Tracking # 1303	EYOGLIDES, JR. O CHANGE OF NAME Case No.	rganization: HAF E - ADULT Case Title H	Submitted By IARRY BEYOGLIDES, JR.	Filed Date 06-17-2016 02:31:14 P	Case History M Refresh]			
Case Type: Case Type: Tracking # 1303 View Pages P	CHANGE OF NAME CHANGE OF NAME Case No.	rganization: HAF E - ADULT Case Title H	RY BEYOGLIDES, JR. Submitted By IARRY BEYOGLIDES, JR. Document Ty	Filed Date 06-17-2016 02:31:14 P ype	Case History M Refresh) Additional Docket Text	Edit Data	On Behalf Of	Signatu
Case Type: Case Type: Tracking # 1303 /iew Pages P R	CHANGE OF NAME CHANGE OF NAME Case No. Pages Of evording Form Data	rganization: HAF	RY BEYOGLIDES, JR. Submitted By IARRY BEYOGLIDES, JR. Document Ty	Filed Date 06-17-2016 02:31:14 P /pe	Case History M Refresh	Additional Docket Text Case Data colected from filer	Edit Data	On Behalf Of	Signati
Case Type: Tracking # 1303 View Pages P R 2 0	CHANGE OF NAME CHANGE OF NAME Case No. Pages Of erording Form Data	rganization: HAF E - ADULT Case Trife H 1 1.0- : APPLICAT	SUBMITTED BY SUBMITTED BY ARRY BEYOGLIDES, JR. Document Ty TON FOR CHANGE OF NA	Filed Date 06-17-2016 02:31:14 P ype ME - ADULT; ENTRY SET	Case History M Refresh	Additional Docket Text Case Data collected from filer	Edit Data	On Behalf Of SHARON OSBORNE:Applicant	Signati
Filer: HARRY B Case Type: Tracking # 1303 View Pages B Image: Comparison of the second secon	CHANGE OF NAME Case No. Case N	rganization: HAF E - ADULT Case June H 1.0- : APPLICAT 1.0- : NOTICE O	Submitted By Submitted By IARRY BEYOGLIDES, JR. Document Ty ION FOR CHANGE OF NA F HEARING ON CHANGE OF	Filed Date 06-17-2016 02:31:14 P rpe ME - ADULT; ENTRY SET OF NAME	Case History M <u>Refresh</u>	Additional Docket Text Case Data collected from filer	Edit Data	On Behalf Of SHARON OSBORNE: Applicant SHARON OSBORNE: Applicant	Signatu •

Approve Filing: Modifying Document Types

- 1. As a user is viewing each docket, determine whether the document type the filer entered is correct or incorrect.
- 2. If the document type needs to be modified, in the document type textbox, click and drag to highlight the entire document type. Begin typing the correct code. This will bring up a list of all codes that include what has been entered.

Figure 50: Editing Document Type

View I	Pages	Pages Of Recording		Document Type	Additional Docket Text	Edit Data	On Behalf Of	Signature
	1	0	N sc	C_COS : CERTIFICATE OF SERV	CE		SEAN PENN:Applicant 🔻	
Recal Total	lculate I Fees	Fees						
/iew P	ages	Pages Of Recording		Document Type	Additional Docket Text	Edit Data	On Behalf Of	Signature
	1	0	🖹 MSC,	OS : CERTIFICATE OF SERVI	CE		SEAN PENN:Applicant 💌	
			Edit D	ocument Type				
			Docur	nent				
Recald	culate A	Fees	Туре:	appli				
			S	ave MSC_21.0- : APPLIC	ATION FOR CHANGE OF NAME - ADULT; ENTRY SETTING H	EARING		
Total	Fees:	\$5.00		MSC_21.2- : APPLIC	A HON FOR CHANGE OF NAME - MINOR; ENTRY SETTING HE	EARING		
				MSC_25.0 : APPLIC	ATION FOR ORDER TO DISINTER REMAINS	TERMENT		
	- 0			MSC_25.1 : JUDGM	ENTENTRY SETTING HEARING ON APPLICATION FOR DISIN	TERMENT		
endi	lo Qu	eues: (o	otional)	Update MSC_25.2 : NOTICE	UT OF REAKING ON APPLICATION FOR DISINTERMENT	FOR DIGINTERMENT		
Post S	Submis	sion to:		MSC 25.5 : WAIVE	OF NOTICE OF NOTICE OF HEARING ON APPLICATION	FOR DISINTERMENT		
				MSC 28 - APRI TCAT				
Delete	Queu	e For Revie	ew On As	ssign To Origi	ICATION FOR DESIGNATION OF HEIR			
				MSC 3E : APPLICAT	TON AND ENTRY TO WAIVE COURT COSTS IN COMBAT REL	ATED DEATHS		
				MSC 5F.1 : APPLIC	ANT INFORMATION			
lote t	to Cle	rk/Court	Staff:	MSC_6.1- : APPLIC	TION TO PREPARE TRANSCRIPT ON CD-ROM			
				MSC_6.2- : APPLICA	TION TO PREPARE TRANSCRIPT			
				MSC_ACOR : APPLI	CATION FOR CORRECTION OF BIRTH WITH SUPPORTING AFF	FIDAVITS		
				MSC_AE : APPLICA	TION AND ENTRY			
				MSC_AECOR : APPL	ICATION AND ENTRY FOR CORRECTION OF BIRTH WITH SU	PPORTING AFFIDAVI	TS	
				MSC_AEREG : APPL	ICATION AND ENTRY FOR REGISTRATION OF BIRTH WITH S	UPPORTING AFFIDA	VITS	
Note t	to File	sr:		MSC_APAY : APPLI	CATION FOR APPROVAL OF TRANSFER OF STRUCTURED SET	TLEMENT PAYMENT	S	
				MSC_APP : APPLICA	TION			
				MSC_APP1 : APPLIC	ATION			
				MSC_AREG : APPLI	ATION FOR REGISTRATION OF BIRTH WITH SUPPORTING A	FFIDAVITS		
				MCC. CM + ADDUTCA	TION FOR CORRECTION OF MARRIAGE			

- 3. Some document types are configured to require a clerk to take action through the edit screen before the eFlex system will allow the clerk to move forward from the "Approve Filing" page. To edit a document, click the Edit Icon in under the "Edit Document" column to be routed to another page to review the data entered by the filer and to make necessary edits. Many documents will not have an icon displayed for the entry. This means no additional data was requested by the eFiling system for that document type.
- 4. If changes have been made, clicking **Recalculate Fees** (Also click **Update Queues**) will cause eFlex to communicate with the CMS to validate user entries prior to approving the filing. This will alert the clerk if there is a problem and potentially help avoid the filing being placed on hold. This is especially important if the Document Type has been changed. The Recalculate Fees button will cause eFlex to verify court fees associated with the new document type. If the fees are different than the original, the clerk will need to determine if rejection of the filing is appropriate.

Figure 51: Validate Filing Prior to Final Action

acking # C	ase No. Case Title	Submitted By	Filed Date	Case History				
81		HARRY BEYOGLIDES, JR.	06-27-2016 09:44:50 AM	Refresh				
Pages Of Pages Of		Document T	уре		Additional Docket Text	Edit Data	On Behalf Of	Signatu
Recording	Form Data				Case Data collected from filer			
3 0	MSC_21.0- : APPLICA	TION FOR CHANGE OF N	AME - ADULT; ENTRY SETT	ING HEARING			TONY STAMEN: Applicant -	SIGNED
1 0	MSC_21.5 : NOTICE	OF HEARING ON CHANGE	OF NAME				TONY STAMEN: Applicant 🔻	
1 0	MSC_5F : WAIVER-O	CN					TONY STAMEN: Applicant 🔻	
1 0	MSC_5F.1 : APPLICAN	NT INFORMATION					TONY STAMEN: Applicant 🔻	
1 0	PROP_MSC_21.1.1 :	PROPOSED MAGISTRATE	'S DECISION - CHANGE OF	NAME - ADULT			TONY STAMEN: Applicant -	
1 0	PROP_MSC_21.1- : P	ROPOSED JUDGMENT EN	ITRY - CHANGE OF NAME -	ADULT			TONY STAMEN: Applicant	
ecalculate Fees	\$174.00							

5. Review the fee information and make any changes necessary using the "Waive/Defer Fees" drop-down menu.

Approve Filing: Queue Routing Override

Note: All submissions have been pre-scanned to determine if they are to be routed to particular queues. Some of the information used to determine to which queues the submissions are routed can include the type of submission, the documents included, or the judge to whom the submission is assigned. The "Send to Queues" option is a system override feature that may occasionally need to be used by the clerk. For instance, if a document in a submission is missing a Magistrate's signature, the submission may need to be sent back to a pre-queue. Another example would be the need to re-assign the judicial queue routing after approval if Magistrate A is absent for an extended period and Magistrate B has been assigned to cover Magistrate A's cases while he is absent. For a better understanding of queues, see the "Working with Queues" section below.

1. Determine if there is a need to override or add to the automatic queue routing associated with this submission.

Total Fees: \$174.00 Payment Method : Token Waive/Defer Fees DO NOT WAIVE/DEFE Take Payment Skip Payment	R FEES 🔻		
Sand To Quayes: (optional)	(Changing Document Type codes may cha	ance queue routing)	
Post Submission to:	for review on:	Assign to:	▼ Add
Post Submission to: Delete Queue For Rev Name Change Publication Queue For Rev	✓ for review on:	Assign to:	▼ Add
Post Submission to: Delete Queue For Rev Name Change Publication Queue Mag Standard-Queue Image: Change Publication Queue	for review on: for review on: System System	Assign to:	▼ Add
Post Submission to: Delete Queue For Rev Name Change Publication Queue Mag Standard-Queue Mag Judicial-Queue	for review on: for review on: System System System	Assign to:	▼ Add
Post Submission to: Delete Queue For Rev Name Change Publication Queue Mag Standard-Queue Image: Change Publication Queue Mag Standard-Queue Image: Change Publication Queue Image: Change Publication Queue Judge Judicial-Queue Image: Change Publication Queue Image: Change Publication Queue	for review on: for review on: System System System System System	Assign to:	▼ Add

2. Use the drop-down menu to select where to post the submission. Select a Queue from the Post Submission to dropdown populates a limited listing in the "Assign to" drop-down.

Figure 53: Use Drop-Down to Route to an Individual within a Queue

1 0 PROP_MSC_21.1.1 : PROPOSED MAGISTRATE'S DECISION - CHANGE OF	NAME - ADULT	TONY STAMEN: Applicant 🔻
■ 1 0 PROP_MSC_21.1-: PROPOSED JUDGMENT ENTRY - CHANGE OF NAME -	ADULT	TONY STAMEN: Applicant 🔻
Recalculate Fees Total Fees: \$174.00 Payment Method : Token Waive/Defer Fees DO NOT WAIVE/DEFER FEES • Take Payment Skip Payment Send To Queues: (optional) Update (changing Document Type codes may change queue routing)	Arvin Seth Miller Catharine Kidd David M. Farmer David White Ginger F. Heuker Jonnfer M. Sowards Joseph Gallagher Karen Tincher Laura M. Smith Loukia Lashley Ralph J. Geisel Stacey Lewis-Range -Not Assigned-	
Post Submission to: Prag Pre-Queue For Review On Assign To Origination		

- 3. Use the "Assign to" drop-down to route the submission to a particular person.
- 4. **Optional:** When appropriate, set an event date using the pop-up calendar.

Figure 54: New Queue Routing Displayed

Recalculate Fees			
Total Fees: \$174.00			
Payment Method : Token			
Waive/Defer FeesDO NOT WAIVE/	DEFER FEES 🔻		
Take Payment Skip Payment			
Send To Queues: (optional)	e (Changing Document Type codes may cha	nge queue routing)	
Post Submission to: Mag Pre-Queue	✓ for review on:	Assign to: David M. Farmer	▼ Add
Delete Queue For Review On As X Mag Pre-Queue Davi	signed To Origination 1 M. Farmer Custom		
Note to Clerk/Court Staff:	Select:	▼	
Note to Filer:	Select:	▼	£1.

5. Click **Add**. The "Approve Filing" page will refresh and display the new queue routing information.

Approve Filing: Viewing and Adding Notes

- If the filing will be reassigned to another user for approval, a note can be added to the "Note to Clerk/Court Staff textbox. This note can be keyed in or the user may select a predefined note to add using the Select dropdown provided.
- If the filing is to be routed backward to a prequeue or it is configured to populate in a standard or judicial queue after the clerk approves the submission, a note can be added to the "Note to Clerk/Court Staff textbox. This note can be keyed in or the user may select a predefined note to add using the Select dropdown provided.
- 3. If the filing is to be rejected and sent back to the filer, potentially for correction, the clerk can include a note to the filer explaining why the filing was rejected. This note can be keyed in or the user may select a predefined note to add using the Select dropdown provided.

Figure 55: Approve/Reject/Reassign Radio Buttons

Note to Clerk/Court Staff:	Select:	
		4
Note to Filer:	Select:	448
		.41
Action: C Approve C Rej	ect 🔍 Reassign To:	
Approve/Reject/Reassign		

4. Having completed the above steps, select an action button from the list at the bottom of the "Approve Filing" page by clicking in the appropriate radio button. In most cases, the choices will be "Approve," "Reject," or "Reassign To."

Note: If the user has previously selected to override the automatic queue routing and route to a prequeue, they will see a "Send" option rather than the "Approve" option.

Figure 56: Send Radio Button

Post Submission to: Mag Pre-Queue	✓ for review on:	Assign to:	Add
Delete Queue For Review On Mag Pre-Queue	Assigned To Origination Custom		
Note to Clerk/Court Staff:	Select:	-	
Note to Filer:	Select:		
			.4
Action: 🔘 Send 🔍 Reject 🤇	Reassign To:	r	

5. Click Approve/Reject/Reassign. Changes will be saved and the submission will be routed to the appropriate queue. The "Filings Awaiting Approval" page will display. After the clerk accepts or rejects a submission, that entry is removed from the list. A reassigned entry will still appear on the Filings Awaiting Approval page with the individual assigned to displayed in the appropriate column.

Working with Queues

Understanding Queues

Queues initially may be one of the most difficult aspects of the eFlex system to understand; however, the queue feature of eFlex, once understood, streamlines the procedural work-flow to maximize time efficiency.

A simplistic explanation of a queue is that a queue is a holding area for submissions that need additional action in the near future. Most of the time, queues are established within the court's trusted network zone and can only be accessed from within that zone. A court can create several queues, and users can be given rights to various queues. Each entry in the queue can be assigned to an individual or not assigned at all. Anyone who has been granted rights to a queue can assign or reassign the entry to another person who has rights to that queue.

In addition to the Clerk Review Queue that submissions go through for clerk approval, there are other types of queues. Some queues are designed for processing before the clerk reviews and approves a filing, and other queues are designed for actions that occur after the clerk reviews and approves the filing.

Figure 57: Queue Routing Graphic



- 2 Documents and data are submitted to court
- 3 Notifications are broadcast to parties on the case for follow-up filings if configured
- 4– If there is a document included configured to stop at the Pre Queue then stop otherwise continue
- 5 All submissions stop at the Clerk Review queue for review and record to CMS/DMS or rejection and return
- 6 Notifications are broadcast for special configurations such as orders
- 7- If there is a document in the submission configured for a standard queue(s) post the submission to the queue(s)
- 8-If there is a document in the submission configured for a judicial queue(s) post the submission to the queue(s)
- 9 Judge approves an order in the Judicial queue, signs it, which creates a new submission

10 - New submission goes to Clerk Review for review and recording

This diagram shows the order of processing between pre-queues, the clerk review queue, the standard queues, the judicial queues, and the recording of information in the CMS. Submissions will stop at these queues based on configuration settings. All queues are configured by the administrator. Usually the type of document being submitted identifies whether a document stops at the pre-queue, judicial or standard queue, or no queue. Sometimes the routing might be determined by the case type.

Pre-Queue: The "Pre-Queue" is a holding area for submissions that are "in process." Any queue within the "Pre-Queue" category contains documents that need to be presented to the judge and processed by either the judge or staff before they move to the clerk review queue. A "Pre-Queue" also could contain documents that need to be processed by the clerk staff prior to approval.

Users with access to the "Pre-Queue" can view all the documents associated with the submission, edit documents associated with the submission, sign documents associated with the submission, and add additional information to the submission such as scheduling. Once the required action is completed, the submission is routed to the next appropriate queue. At times, the user may select to manually route the submission to another queue or assign another person to the submission, but most often the eFlex

system will automatically route the submission to the clerk queue after the required action has been taken.

The prequeue is the most time-sensitive queue. The filing cannot proceed to be approved or rejected until action is taken in the prequeue. If one document in the submission is flagged to stop in the prequeue, the entire submission stops until prequeue action is completed.

Clerk Review Queue: The majority of this document is dedicated to the processing of filings in the clerk review queue. All document types pass through the clerk review queue. Some document types are configured to be automatically approved so they do not show in the list of "Awaiting Approval." Some document types are configured not to be recorded in the CMS and are configured with automatic approval so it appears as though they by-pass clerk review, but they don't. For example, a proposed order that is not configured to stop in the pre-queue could be automatically approved, but because it is configured not to be recorded in the CMS, this document would automatically be posted to a judicial queue.

CMS and DMS: After a submission has gone through the clerk review process, most documents and information are recorded in the CMS and the DMS. When the eFlex system was configured, the system administrator might have marked appropriate document types, such as proposed orders, not to be recorded in the CMS or DMS. The DMS is the portion of the system where the documents are stored electronically.

Secondary Queues: There are two types of secondary queues, Standard Queues and Judicial Queues.

Standard Queues: The "Standard Queue" is a holding place for submissions that require the clerk, judicial staff, or others to take action. Essentially, it is a "To Do List." The action is usually procedural, is outside of the eFlex system, and is not necessarily tied to particular information contained in a document. Such actions can include: mailing documents, entering CMS data that was not handled by eFlex, and other manual activities as needed. Once the clerk has completed the action required, the eFlex system automatically deletes the queue entry. Common examples of "Standard Queues" include "Summons Queue," "Complaint Queue," "Juvenile Queue," or "Notice of Appeal Queue."

Judicial Queues: The "Judicial Queue" allows judicial staff, including judges, to respond to documents filed by another user. Some "Judicial Queues" are public, such as the "Duty Queues." Entries within the public "Judicial Queues" can be viewed by all queue users and can be reassigned freely. However, most "Judicial Queues" are configured to be limited to a single judge and his or her support staff. Thus, one judge will not see other judges' cases and the queue entry cannot be reassigned to those outside the judge's staff.

One important concept to remember with judicial queues is that the filer's submission has been completely processed by eFlex, and the judicial queue entry is simply REFERENCING the filer's submission documents. Submissions in the "Judicial Queue" usually require an individual within

the court to take an action on a particular document, including creating a new submission based on what is contained in the original submission. These submissions circle back to the clerk review queue. Common examples of queues within the "Judicial Queues" type are "Motions Queue" or "Proposed Orders Queue."

Taking Action on Items in a Queue

Note: Whether or not a particular user has access to queues is determined by the role of the user and the permissions the system administrator has configured for that role. Some users may not need to access a queue and therefore will not have a "View Queues" button on the Home page or an "Action Queues" option in the menu bar dropdown.

This section demonstrates how to

- View queue entries
- View the queue log

Note: Depending upon how the Administrator sets up each role, some of the screen shots and instruction may be different for Lead Clerks and Clerks or for Magistrates and Case Managers.

Accessing Your Queue Entries

1. From the "Home" page, click on the **View Queues** button or select **Filings** > **Action Queues** from the menu bar at the top of any page. This routes the user to "My Queue Entries."

Figure 58: My Queue Entries

lome Filings	CASEaD	a My Profile Logout		user: David M. Farmer						
Home => My Queue	Entries									
My Onono Fr	trios									
viy Queue El	littles									
MONTGOMERY	OUNTY P	ROBATE								
Filter By View Entrie	s in: All Qu	ueues 🔻 Assig	gned To: All Users 🔻 R	eview Date: Today's Items 🔻						
Search By: All		•								
Go	Clear Search									
Add Queue Entry)									
	·		Number of opt	ion displayed par page: 50 -						
			Number of end	ies uspiayed per page. 50 +						
Oueue Entry Id	Tracking #	Queue	Title	<u>Case Title</u>	Case Number	Days In Queue	Original File	r <mark>Assigned To</mark> D	ivision Number	Deferred Da
🔲 1036 📲	1342	Mag Pre-Queue	APPLICATION FOR CHANGE OF NAME - ADULT; ENTRY SETTING HEARING	New Case		0	David Schmidt	David Farmer		
🔲 1033 📲	0	Mag Judicial-Queue	CERTIFICATE OF SERVICE	THE CIVIL CASE OF SEAN PENN	2016MSC00047	0	LMT		C::DW	
🔲 1032 着	0	Mag Judicial-Queue	CERTIFICATE OF SERVICE	THE CIVIL CASE OF SARA STANLEY	2016MSC00049	0	LMT		C::DW	
🔲 1029 着	0	Mag Judicial-Queue	CERTIFICATE OF SERVICE	THE CIVIL CASE OF SEAN PENN	2016MSC00047	0	LMT		C::DW	
🔲 1025 🔒	1385	Judge Judicial-Queue	MOTION MOTION TO APPOINT GUARDIAN AD LITEM	THE CIVIL CASE OF HELGA HOMEMAKER	2016MSC00148	1	David Schmidt		C::JM	
🔲 1020 着	1377	Judge Judicial-Queue	PROPOSED JUDGMENT ENTRY - CHANGE OF NAME - ADULT	THE CIVIL CASE OF SHARON ROWE	2016MSC00146	1	David Schmidt		C::DW	
🔲 1019 🔒	1377	Mag Judicial-Queue	PROPOSED MAGISTRATE'S DECISION - CHANGE OF NAME - ADULT	THE CIVIL CASE OF SHARON ROWE	2016MSC00146	1	David Schmidt		C::DW	
				1						

2. There are several drop-down filters listed at the top of the "My Queue Entries" page. These will allow the user to limit what is displayed on this page. Use the drop-downs to filter the list of submissions that appear.

Figure 59: My Queue Entries Drop-Down Menus



- 3. Click **Refresh** to reload the current page. The screen will display all the entries that match the filter criteria. The user's assigned role will determine which queues they can access or work in.
- 4. If a user wishes to assign a task to their own workflow, on the "My Queue Entries" page, click in the checkbox to the left of the entry and click **Assign task to myself**. If the user has a long list of entries, scroll down to the bottom of the page to see the **Assign task to myself** button. The "My Queue Entries" page will refresh, and the user will be listed in the "Assigned To" column to the right of the entry.

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Figure 60: Assign Task to Myself

Home	Filings	CASEaDi	a My Profile Logout		user: David M. Farmer						
Home :	⇒ My Queue E	intries									
My (Queue En	tries									
MONT	GOMERY C	OUNTY P	ROBATE								
Filter E	By View Entries	s in: All Qu	Jeues 🔻 Assig	ned To: All Users 🔻 Re	eview Date: Today's Items 🔻						
Searc	h By: All		•								
	G0) C	llear Search									
Add	Queue Entry										
	,)			Number of entr	ies displayed per page: 50 💌						
_				Number of end	ics aspayed per page. 50						
D	ueue Entry Id	Tracking #	Queue	Title	Case Title	Case Number	▼ <u>Days In Queue</u>	Original Filer	Assigned To	Division Number	Deferred Dat
1	036 榋	1342	Mag Pre-Queue	APPLICATION FOR CHANGE OF NAME - ADULT; ENTRY SETTING HEARING	New Case)	David Schmidt	David Farmer		
V 1	033 ብ	0	Mag Judicial-Queue	CERTIFICATE OF SERVICE	THE CIVIL CASE OF SEAN PENN	2016MSC00047) 1	LMT		C::DW	
V 1	032 ብ	0	Mag Judicial-Queue	CERTIFICATE OF SERVICE	THE CIVIL CASE OF SARA STANLEY	2016MSC00049) 1	LMT		C::DW	
V	029 省	0	Mag Judicial-Queue	CERTIFICATE OF SERVICE	THE CIVIL CASE OF SEAN PENN	2016MSC00047)	LMT		C::DW	
	025 🐴	1385	Judge Judicial-Queue	MOTION MOTION TO APPOINT GUARDIAN AD LITEM	THE CIVIL CASE OF HELGA HOMEMAKER	2016MSC00148	L I	David Schmidt		C::JM	
	020 ብ	1377	Judge Judicial-Queue	PROPOSED JUDGMENT ENTRY - CHANGE OF NAME - ADULT	THE CIVIL CASE OF SHARON ROWE	2016MSC00146	L	David Schmidt		C::DW	
	019 ┨	1377	Mag Judicial-Queue	PROPOSED MAGISTRATE'S DECISION - CHANGE OF NAME - ADULT	THE CIVIL CASE OF SHARON ROWE	2016MSC00146	L I	David Schmidt		C::DW	
	l				1						
Assign	n task to myself	Delet	e								
_											

Routing to and Working with a Prequeue from "My Queue Entries"

- 1. **Optional:** Set the "Filter by View Entries in:" to the PreQueue and click **Go**.
- 2. Click the document title link on the "My Queue Entries" page for the prequeue entry to be worked. The user will be directed to the "PreQueue Entry" page.

Figure 61: PreQueue Entry Page

My Oueue E							
INIV OUCUC L	ntrioc						
	litries						
MONTGOMERY	COUNTYPR	DBATE					
Filter By View Enti	ries in: Mag Pr	-Queue Assigned To: All Users Review Date: Loday	∕s Items ▼				
Go	Clear Search)					
Add Queue Entr	Y)	Number of entries displayed per pa	age: 50 💌				
Oueue Entry	Id Tracking #	Queue <u>Title</u> <u>Case Title</u>	Case Number V Days In Queue	Original Filer Assign	ied To Divi		
🔲 1036 🔒	1342 M	ag Pre-Queue APPLICATION FOR CHANGE OF NAME . New Case	0	David David Schmidt Farme	r		
Assign task to mys	elf Delete						
PreQueue E	ntry						
Fler: David Schmi	- dt Organizat	on: DAVID SCHMIDT					
	-	_					
Tracking # Filer	ID Case No. Cas	e Title Case Type Filed Date Judge					
1342 160.	1	Change of NAME - ADULT 06-22-2016 03:46:36 PM					
View Remove Re	eplace Documen		Additional Docket Text	Edit Data	On Behalf Of	My Signature	Request Signature
B					RAY WILLIAMS: Applicant •		
B	-9				RAY WILLIAMS: Applicant •		
	100	I MOC 21.5 . NOTICE OF REAKING ON CHANGE OF NAME			RAY WILLIAMS Applicant V		
B	A	PROP. MSC 21.1.1.1 BROBOSED MACISTRATE'S DECISION - CHANGE OF NAME - ADULT					
	-9 -9	PROP_MSC_21.1.1 : PROPOSED MAGISTRATE'S DECISION - CHANGE OF NAME - ADULT			RAY WILLIAMS: Applicant		-
	-8 -8	PROP_MSC_21.1.1 : PROPOSED MAGISTRATE'S DECISION - CHANGE OF NAME - ADULT MSC_SF : WAIVER-OCN			RAY WILLIAMS: Applicant RAY WILLIAMS: Applicant RAY WILLIAMS: Applicant		
	-8 -8	Image: Prop_msc_21.1.1 : Proposed Magistrate's Decision - Change of NAME - Adult Image: Msc_sf : WAIVER-OCN Image: Prop_msc_21.1 : Proposed Judgment Entry - Change of NAME - Adult			RAY WILLIAMS:Applicant RAY WILLIAMS:Applicant RAY WILLIAMS:Applicant		•
Add Document	-ର -ର -ର	Image: Prop_msc_21.1.1 : PROPOSED MAGISTRATE'S DECISION - CHANGE OF NAME - ADULT Image: Msc_sf : WAIVER-OCN Image: Prop_msc_21.1 : PROPOSED JUDGMENT ENTRY - CHANGE OF NAME - ADULT			RAY WILLIAMS:Applicant RAY WILLIAMS:Applicant RAY WILLIAMS:Applicant		
Add Document	+ - - - - - - - - - - - - -	Image: Prop_msc_21.1.1 : PROPOSED MAGISTRATE'S DECISION - CHANGE OF NAME - ADULT Image: Msc_sf : WAIVER-OCN Image: Prop_msc_21.1 : PROPOSED JUDGMENT ENTRY - CHANGE OF NAME - ADULT			RAY WILLIAMS:Applicant RAY WILLIAMS:Applicant RAY WILLIAMS:Applicant		
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Add Document Add Document Note From Fib Note to Clerk, Note to Fiber:	문 문 문 None //Court Staff:	PROP_MSC_21.1.1 : PROPOSED MAGISTRATE'S DECISION - CHANGE OF NAME - ADULT MSC_SF : WARR-OCN PROP_MSC_21.1 - : PROPOSED JUDGMENT ENTRY - CHANGE OF NAME - ADULT Select: Select:	A		RAY WILLIAMS:Applicant • RAY WILLIAMS:Applicant • RAY WILLIAMS:Applicant •		
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Add Document Note From Fil Note History Note to Clerk	4 4 4 4 2 4 2 4 2 2 2 2 2 2 2 2 2 2 2 2	PROP_MSC_21.1.1 : PROPOSED MAGISTRATE'S DECISION - CHANGE OF NAME - ADULT MSC_SF : WAIVER-OCN PROP_MSC_21.1 - : PROPOSED JUDGMENT ENTRY - CHANGE OF NAME - ADULT Select:			RAY WILLIAMS:Applicant • RAY WILLIAMS:Applicant • RAY WILLIAMS:Applicant •		
Add Document Add Document Note From Fil Note History Note to Clerk, Note to Filer:	4 4 4 er: None None /Court Staff:	PROP_MSC_21.1.1 : PROPOSED MAGISTRATE'S DECISION - CHANGE OF NAME - ADULT MSC_SF : WADVER-OCN PROP_MSC_21.1 - : PROPOSED JUDGMENT ENTRY - CHANGE OF NAME - ADULT Select:			RAY WILLIAMS:Applicant • RAY WILLIAMS:Applicant • RAY WILLIAMS:Applicant •		
Add Document Add Document Add Document Note From Fil Note to Clerk, Note to Filer: Action: Constant	Court Staff:	PROP_MSC_21.1.1 : PROPOSED MAGISTRATE'S DECISION - CHANGE OF NAME - ADULT MSC_SF : WAIVER-OON PROP_MSC_21.1 - : PROPOSED JUDGMENT ENTRY - CHANGE OF NAME - ADULT Select: Select: Select: Select:			RAY WILLIAMS:Applicant • RAY WILLIAMS:Applicant • RAY WILLIAMS:Applicant •		
Add Document Add Document Add Document Add Document Note From Fil Note to Clerk, Note to Filer: Action: Sign	Court Staff:	PROP_MSC_21.1.1 : PROPOSED MAGISTRATE'S DECISION - CHANGE OF NAME - ADULT MSC_SF : WAIVER-OON PROP_MSC_21.1 - : PROPOSED JUDGMENT ENTRY - CHANGE OF NAME - ADULT Select: Select: Select: Select:	.a.		RAY WILLIAMS:Applicant • RAY WILLIAMS:Applicant • RAY WILLIAMS:Applicant •		

3. From this page, the user may view any documents listed by clicking on the icon listed under the "View" column. Depending on the configuration of the web browser, either another browser tab displaying the document or a dialog box allowing the user to download the document will appear.

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	er in case no. ca	ise Title Case Type Filed Date Judge					
1342 16	501	CHANGE OF NAME - ADULT 06-22-2016 03:46:36 PM					
/iew Remove	Replace Docume	nt Document Type	Additional Docket Text	Edit Data	On Behalf Of	My Signature	Request Signat
	-	KMSC_21.0- : APPLICATION FOR CHANGE OF NAME - ADULT; ENTRY SETTING HEARING			RAY WILLIAMS: Applicant 💌		-
	Ð	MSC_5F.1 : APPLICANT INFORMATION			RAY WILLIAMS: Applicant 💌		
	-	MSC_21.5 NOTICE OF HEARING ON CHANGE OF NAME			RAY WILLIAMS: Applicant 🔻		
	-0	PROP_MSC_21.1.1: PROPOSED MAGISTRATE'S DECISION - CHANGE OF NAME - ADULT			RAY WILLIAMS: Applicant 💌		-
	-	MSC_5F : WAIVER-OCN			RAY WILLIAMS: Applicant 🔻		
	-8	PROP_MSC_21.1- : PROPOSED UDGMENT ENTRY - CHANGE OF NAME - ADULT			RAY WILLIAMS: Applicant 🔻		-

Figure 62: View Filer's Original Document

4. Optional: Some document types may include a word-processed document, allowing additions or changes made to the document. Once changes have been made to the document, a clerk or judicial staff may save the original document in a pdf format. The pdf will then replace the word-processed document. If the clerk or judicial staff wishes to replace the filer's original document, click on the "Replace Document" icon <a>[4]. The "Replace Document" page opens.

Figure 63: Replace Document in a Prequeue Entry



- 5. **Optional:** Click the browse button to search the local computer for the appropriate replacement document.
- Optional: Click Replace Document. The user is returned to the PreQueue Entry page. Alternately, click Cancel to return to the "My Queue Entries" page without making any changes.
- 7. Some documents allow the clerk to edit them. Some document types are configured to require a clerk or magistrate to take action through the edit screen before the eFlex system will allow the clerk or magistrate to move forward from the PreQueue Entry page. To edit a document, click the icon under the "Edit Document" column to be routed to another page where those edits are possible.

 Just as in filing hard-copy case initiations or follow-up filings, certain electronic filings will require court-submitted documents. eFlex provides for electronic handling of this requirement. Click Add Document to be routed to the "Add Document" page.

Figure 64: Add a Document

Tracking # Fil	er ID Case No. Case	e Title Case Type Filed Date Judge					
1342 16	501	CHANGE OF NAME - ADULT 06-22-2016 03:46:36 PM					
/iew Remove	Replace Document	Document Type	Additional Docket Text	Edit Data	On Behalf Of	My Signature	Request Signa
	-0	MSC_21.0- : APPLICATION FOR CHANGE OF NAME - ADULT; ENTRY SETTING HEARING			RAY WILLIAMS: Applicant 🔻	•	-
	-0	MSC_5F.1 : APPLICANT INFORMATION			RAY WILLIAMS: Applicant 💌		
	-0	MSC_21.5 : NOTICE OF HEARING ON CHANGE OF NAME			RAY WILLIAMS: Applicant 🔻		
	-0	PROP_MSC_21.1.1 : PROPOSED MAGISTRATE'S DECISION - CHANGE OF NAME - ADULT			RAY WILLIAMS: Applicant 💌		•
	-	MSC_5F : WAIVER-OCN			RAY WILLIAMS: Applicant 💌		
	-0	PROP_MSC_21.1- : PROPOSED JUDGMENT ENTRY - CHANGE OF NAME - ADULT			RAY WILLIAMS: Applicant -		

9. On the "Add Document" page, use the drop-down menu to select the document type to add.

Figure 65: Select Document Type to Add

Home	Filings	CASEaDia	My Profile	Logout	user: David M. Farmer
<u>Home</u> ⇒ <u>My</u>	Queue Entri	<u>es</u> ⇒ <u>PreQueu</u>	<u>e Entry</u> ⇒ Ado	d Document	
Add Doc	ument			Select Document Type	
*Required Fie	elds			1	
Document t	o Add:	ADDITIONA	AL DEPOSIT '	••••••••••••••••••••••••••••••••••••••	
File to Uploa	ad: *	Browse	No file sele	cted.	
Cancel	Add Do	cument			

- 10. Click **Browse** to search the local computer for the appropriate document file to attach.
- 11. Once the document is located, click **Add Document** to add the document and return to the Prequeue Entry page. Alternately, click **Cancel** to return to the PreQueue Entry page without making any changes.

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Figure 66: Document Added

ome Filin	igs CASEaDi	a My Profile Logout u	user: David M. Farmer				
ome ⇒ <u>My Que</u>	<u>eue Entries</u> ⇒ Pr	eQueue Entry					
PreQueue 1	Entry						
- Fler: David Schr	• midt Organiza	tion: DAVID SCHMIDT					
ICT: David Schi	mat organiza	INT. DAVE SCHEET					
Tracking # File	er ID Case No. Ca	ase Title Case Type Filed Date Judge					
1342 16	501	CHANGE OF NAME - ADULT 06-22-2016 03:46:36 PM					
View Remove I	Replace Docume	nt Document Type	Additional Docket Text	Edit Data	On Behalf Of	My Signature	Request Signa
View Remove I	Replace Docume	NT Document Type	Additional Docket Text	Edit Data	On Behalf Of RAY WILLIAMS:Applicant	My Signature	Request Signa
View Remove I	Replace Docume	nt Document Type Document Type MSC_21.0- : APPLICATION FOR CHANGE OF NAME - ADULT; ENTRY SETTING HEA MSC_5F.1 : APPLICANT INFORMATION	Additional Docket Text	Edit Data	On Behalf Of RAY WILLIAMS:Applicant RAY WILLIAMS:Applicant	My Signature	Request Signa
View Remove I	Replace Docume	Document Type Image: Second	Additional Docket Text	Edit Data	On Behalf Of RAY WILLIAMS:Applicant RAY WILLIAMS:Applicant RAY WILLIAMS:Applicant	My Signature	Request Signa
View Remove I	Replace Docume	Document Type MSC_21.0: APPLICATION FOR CHANGE OF NAME - ADULT; ENTRY SETTING HEA MSC_25F.1: APPLICANT INFORMATION MSC_21.5: NOTICE OF HEARING ON CHANGE OF NAME MSC_21.1: NOPOSED MAGISTRATE'S DECISION - CHANGE OF NAME	Additional Docket Text	Edit Data	On Behalf Of RAY WILLIAMS:Applicant RAY WILLIAMS:Applicant RAY WILLIAMS:Applicant RAY WILLIAMS:Applicant	My Signature	Request Signa
View Remove I	Replace Docume	Document Type If MSC_21.0: APPLICATION FOR CHANGE OF NAME - ADULT; ENTRY SETTING HEA If MSC_SF.1: APPLICANT INFORMATION If MSC_SI.5: NOTICE OF HEARING ON CHANGE OF NAME If PROP_MSC_21.1: PROPOSED MAGISTRATE'S DECISION - CHANGE OF NAME - If MSC_SF. VMADER-OCN	Additional Docket Text	Edit Data	On Behalf Of RAY WILLIAMS: Applicant	My Signature	Request Signa
View Remove i Compared in the second	Replace Docume 	Document Type MSC_21.0: : APPLICATION FOR CHANGE OF NAME - ADULT; ENTRY SETTING HEA MSC_SF.1: APPLICANT INFORMATION MSC_21.5: NOTICE OF HEARING ON CHANGE OF NAME PROP_MSC_21.1.1: RROPOSED MAGISTRATE'S DECISION - CHANGE OF NAME MSC_SF: WANNER-CON MSC_22.1.2: RROPOSED JUDGMENT ENTRY - CHANGE OF NAME - ADULT	Additional Docket Text	Edit Data	On Behalf Of RAY WILLIAMS:Applicant RAY	My Signature	Request Signa

12. **Optional:** On the PreQueue Entry page, click the icon **i** in the "Remove Document" column to remove the document added by the clerk or judicial staff and refresh the page view.

Note: A clerk or magistrate can only delete documents he or she adds. The filer's document can be replaced but not removed.

Figure 67: Add a Signature to a Document

PreQueu Fier: Michael	e Entry Willams Organizat	tion: TYBERA TEST				
Tracking # 1406	Filer ID Case No. Cas 1666	e Title Case Type Filed Date Judge CHANGE OF NAME - ADULT 07-05-2016 01:14:46 PM				
View Remo	ve Replace Document	t Document Type	Additional Docket Text Edit D	ata On Behalf Of	My Signature	Request Signature
	-	MSC_21.0- : APPLICATION FOR CHANGE OF NAME - ADULT; ENTRY SETTING HEAR	NG	SANDRA ALEXANDER: Applicant 🔻	David Farmer	
	-8	MSC_5F.1 : APPLICANT INFORMATION		SANDRA ALEXANDER: Applicant 🝷		
	-	MSC_21.5 : NOTICE OF HEARING ON CHANGE OF NAME		SANDRA ALEXANDER: Applicant 🔻		
	-	PROP_MSC_21.1.1 : PROPOSED MAGISTRATE'S DECISION - CHANGE OF NAME - AI	DULT	SANDRA ALEXANDER: Applicant 🔻		
	-	PROP_MSC_21.1- : PROPOSED JUDGMENT ENTRY - CHANGE OF NAME - ADULT		SANDRA ALEXANDER: Applicant 🔻		•

- 13. If required, the user can include a predefined signature by selecting one from the drop-down menu in the "My Signature" column. Alternately, request a signature by clicking the checkbox under the "Req Signature" column.
- 14. View notes about the submission by clicking the expansion icon ("+") next to "Note from Filer" or "Note History." If there are no notes in either category, the listing will say "None."

Figure 68: Add a Note

Note Histor				
NOTE HISTOI	y None			
lote to Clerk	<th>Select:</th> <th>Set for hearing</th> <th></th>	Select:	Set for hearing	
Magistrate has	reviewed; ok to set for hea	ring.		
				 .11
lote to Filer:	Select:		▼	
Actions				

15. Include a note by using the "Add Standard Text" drop-down menu or by typing an original note in the textbox provided. The note will then appear to the individual filer or to the individual to whom the filing is (re)assigned. For example, if the filing is re-assigned to another clerk, then that clerk will see the note.

Figure 69: Select Action Radio Button

Note to Clerk	/Court Staff:	Select:	Set for hearing		
Magistrate has	reviewed; ok to set for hea	ring.			
Note to Filer:	Select:		▼		
					.11
Action:					
🔘 Sign	O Process Unsigned	🔘 Return To Filer	© Reassign To:	▼	
Back	Process/Return/Reassign				

16. Click the appropriate radio button for action on this submission. The check box or radio button chosen will cause the final action button at the bottom of the page to change according to the selection. The user must complete the next step(s) before the actions are saved and recorded.

Action: Sign	© Process Unsigned	🖲 Return To Filer	© Reassign To:	•
Back Action:	Sign Document(s)			
Sign Back	Process Unsigned Process Submission	🔘 Return To Filer	© Reassign To:	
© Sign Back	Process Unsigned Reject Filing	Return To Filer	© Reassign To:	•
Action: Sign Back	Process Unsigned Reassign Filing	🔍 Return To Filer	Reassign To:	•

Figure 70: Sign/Reject/Reassign Radio Buttons

- 17. If selecting "Reassign To," use the drop-down menu to assign to a queue and to an individual associated with that queue.
- 18. Click the Sign Documents button (or its equivalent dependent upon the radio button selected above) to complete the action and record the changes. The "My Queues Entries" page will display and the entry just completed will no longer appear on the list.
- 19. **Optional:** Click the Cancel button to return to the "My Queue Entries" page without taking any action on the case just viewed.
- 20. **Optional:** Use the menu bar to select Filings > Action Queue Log to check the status of filings on which action has been taken.

Routing To and Working with a Standard Queue from "My Queue Entries"

Generally, a Standard Queue entry exists because an action outside of eFlex must be completed. The Standard Queue serves as a "To Do" list reminder as well as a filing or case information reference. Most Standard Queues will be accessed from within the Court Review Interface, but Standard Queues can be configured to be accessed through the Filer's Interface by users with particular roles. For instance, a Sheriff's Queue or Private Process Server's Queue could be configured for access by users with the role of sheriff or process server. Their access would be through the Filer Interface. 1. On the "My Queue Entries" page, click the link under the "Title" column of a Standard Queue entry to view more detailed information about the submission. The user will be routed to the "Action Details" page for that submission.

Court: MONTGO	MERY COU	NTY PROBATE V								
Filter By View Entrie	es in: All Q	ueues	▼ Assigned To: All Users	▼ Review Date: All	•					
Search By: All		•								
Go	Clear Search									
Add Queue Entry)									
Add Queue Entry	J			Number of entries displayed per	page: 50 🔻					
Add Queue Entry) 1 <u>Tracking #</u>	Queue	Title	Number of entries displayed per	r page: 50 v	▼ <u>Days In Queue</u>	Original Filer	Assigned To	Division Number	r <u>Deferre</u> c
Add Queue Entry Oueue Entry Id 1061) 1 Tracking # 1406	Queue Mag Pre-Queue	Title APPLICATION FOR CHANGE OF NAME - ADULT: ENTRY SETTING HEARING	Number of entries displayed per Case Title New Case	r page: 50 v	▼ <u>Days In Queue</u> 0	<u>Original Filer</u> Michael Wiliams	<u>Assigned To</u> David Farmer	Division Number	r Deferred
Add Queue Entry Id Queue Entry Id 1061	1 Tracking # 1406 1394	Queue Mag Pre-Queue Clerk Standard-Queue	TILLE APPLICATION FOR CHANGE OF NAME - ADULT; ENTRY SETTING HEARING NOTICE OF HEARING ON CHANGE OF NAME	Number of entries displayed per Case Title New Case THE CIVIL CASE OF JACK SPRAT	page: 50 Case Number 2016MSC00151	▼ <u>Days In Oueue</u> 0 6	<u>Original Filer</u> Michael Wiliams jack sprat	<mark>Assigned To</mark> David Farmer	Division Number C::DW	r <u>Deferrec</u>

Figure 71: My Queue Entries

2. If the entry is already assigned, a warning dialog box will appear notifying the user of that fact. It is important that only one person take action on the filing. Click **OK** to continue to the "Action Details" page.

Figure 72: Warning Dialog

72


Figure 73: Standard Queue Action Details

Standard Q	ueue Entry							
Case Number: Case Title: Case Type: Opened: Case History: Document Info	2016MSC00151 THE CIVIL CASE OF CIVIL/MISCELLANEC 06-29-2016 Full Case History	JACK SPRAT DUS Service List ed To Stacy M. Co	Plaint Defen Judge Amt. Jury/	iff: dant: e: of Claim: Non Jury:	Jack Spra' Jack Spra' David A. W Non-Jury	Г et al r /HIТЕ		
	Document Link		Document			File Date		Original Filer
21 0 Application	n for Change of Na	me Adultwink.pdf	APPLICATION FOR CHANGE OF NAMI SETTING HEARING	E - ADULT; E	NTRY	06-29-2016	jack sprat	-
MC 5F Waiverw	<u>vink.pdf</u>		WAIVER-OCN			06-29-2016	jack sprat	
21 5 Notice of	Hearing on Change	e of Namewink.pdf	NOTICE OF HEARING ON CHANGE OF	F NAME		06-29-2016	jack sprat	
APPLICANT INFO	RMATION.pdf		APPLICANT INFORMATION			06-29-2016	jack sprat	
21 1 1 Magistra	ates Decision Chang	e of Namewink.pdf	PROPOSED MAGISTRATE'S DECISIO ADULT	N - Change	of NAME -	06-29-2016	jack sprat	
Note from Filer Note from Cou Note History	: None rt: David White - app	prove					J	
Date	From	То	Note					
2016-06-29 Add Note: Sav	David White	David White	approve]	
Reassign To: U	nassign Delete Com	Queue: Reassign		ate Deferred	1 07/05/201	6	1919	

3. From the "Action Details" page, the user may view any documents listed by clicking on the link under the "Document Link" column. Depending upon the web browser and its configuration either a new tab will open and display the document, or a dialog box will appear.

Figure 74: Standard Queue Action Details

Case Number: Case Title: Case Type: Opened: Case History: Document Infor	2016MSC00151 THE CIVIL CASE OF JACK SPRAT CIVIL/MISCELLANEOUS 06-29-2016 Full Case History Service List rmation - Assigned To Stacy M. C	Plaintiff: Defendant: Judge: Amt. of Claim: Jury/Non Jury: Dleman	JACK SPRAT JACK SPRAT DAVID A. W Non-Jury	T et al T HITE		
	Document Link	Document		File Date		Original Filer
21 0 Application	for Change of Name Adultwink.pdf	APPLICATION FOR CHANGE OF NAME - ADULT; E SETTING HEARING	NTRY	06-29-2016	jack sprat	
MC 5F Waiverwi	nk.pdf	WAIVER-OCN		06-29-2016	jack sprat	
21 5 Notice of	Hearing on Change of Namewink.pdf	NOTICE OF HEARING ON CHANGE OF NAME		06-29-2016	jack sprat	
APPLICANT INFO	RMATION.pdf	APPLICANT INFORMATION		06-29-2016	jack sprat	
<u>21 1 1 Magistra</u>	tes Decision Change of Namewink.pd	PROPOSED MAGISTRATE'S DECISION - CHANGE ADULT	OF NAME -	06-29-2016	jack sprat	
21 1 Judgment	Entry Change of Namewink.pdf	PROPOSED JUDGMENT ENTRY - CHANGE OF NAM	1e - Adult	06-29-2016	jack sprat	

- 4. If a dialog box appears, determine whether to open the file or save the file to a local computer, select the appropriate radio button, and click **OK**. The document will appear as instructed.
- 5. After having accessed the information about the filing and completed the task associated with the filing, the user can click **Complete**. This action is similar to placing a checkmark beside a completed item on a "To Do" list. The queue entry is marked as completed in the Action Queue Log and does not route anywhere else in the eFlex system.
- 6. Alternately, from the "Action Details" page, the user may assign an entry to themselves or another clerk by using the drop-down menu at the bottom of the page.

lote History					_
Date	From	То		Note	
2016-06-29	David White	David White	approve		
agazian Tay	acu M. Coloman			Data Deferred 07/0E/2016	.4

Figure 75: Reassigning Submission

- 7. After the user has selected an individual to whom the entry will be assigned, click **Reassign to**. This action returns the user to the "My Queue Entries" page, and the name of the person whom has been assigned will appear next to the listing under the "Assigned To" column.
- 8. **Optional:** To delete the standard queue entry without taking any action, click **Delete**. The entry will be removed, and the "Action Queue Log" will display "No Action" in the Action column.
- 9. **Optional:** To return to the "My Queue Entries" page without making any assignments, click **Back**.

Routing to and Working with a Judicial Queue from "My Queue Entries"

The Judicial Queue, like the Standard Queue, receives entries after they have been approved in the Clerk Approval Queue. The Judicial Queue varies from the Standard Queue in that action taken from the Judicial Queue is within in the eFlex system and affects other functions within the eFlex system. Also, the Judicial Queue gives the user a unique "360° view" of the filing. From the Judicial Queue Action Details page, there is the ability to see what has already been recorded in the CMS for the case, the current document and information about the submission of which the document was part, and any other filings to the case that are in process within the eFlex system. It is the page where another filing, based on the document the filer submitted, will be created.

1. After clicking a case title of a Judicial Queue entry link on the "My Queue Entries" page, the user will be directed to the "Action Details" page.

Figure 76: Action Details for Judicial Queue

Case Number Case Title	Case Type Op	ened Date Judge					
2010HSCA2102 THE CIVIL CASE OF SHAW	NON SORENSON CIVIL/MISCELDINEOUS 0/	-13-2016 DAVID PARMER					
elated Filings Awaiting Approval in C	lerk Queue						
Document F AFFIDAVIT	File Date 07-14-2016 M	Assigned To tarianne Weikert					
	07 14 2010						
Other Pending Actions - Case Number	2016MSC00169						
т	tle	Original Filer	File Date		Assigned To	Quer	ie Name
PROPOSED JUDGMENT ENTRY - CHANGE OF	NAME - ADULT SORENSON JUDGMENT	Michael Williams	07-14-2016			Judge Judicial-Que	eue
APPLICANT INFORMATION SORENSON APPL	ICANT INFORMATION	Michael Williams	07-14-2016			Mag Standard-Qu	eue
Add Quaue Entry							
Non Grene Pick							
ocument Information							
	Document		File Date		A	ssigned To	
PPLICATION FOR CHANGE OF NAME - ADULT	ENTRY SETTING HEARING SORENSON APP	PLICATION NAME CHANGE	07-11-2016				
PPLICANT INFORMATION SORENSON APPLIC	ANT INFORMATION		07-11-2016				
NOTICE OF US ADDRES ON CHANGE OF MANE	ODENCON NOTICE OF USADDIC		07.11.2016				
NOTICE OF HEARING ON CHANGE OF NAME S	ORENSON NOTICE OF HEARING	ATE'S DESCISION	07-11-2016				
NOTICE OF HEARING ON CHANGE OF NAME S PROPOSED MAGISTRATE'S DECISION - CHAN PROPOSED JUDGMENT ENTRY - CHANGE OF	ORENSON NOTICE OF HEARING GE OF NAME - ADULT SORENSON MAGISTR/ NAME - ADULT SORENSON JUDGMENT ENTR	ATE'S DESCISION	07-11-2016 07-11-2016 07-11-2016				
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ADTEC OF HEARING ON CHANGE OF ANES BROPOSED MAISTATES DECISION - CHANGE OF IROPOSED JUDGMENT ENTRY - CHANGE OF IROPOSED JUDGMENT ENTRY - CHANGE OF IROPOSED JUDGMENT ENTRY - CHANGE OF IROP REPORT IROP REPORT	OREINGON INOTICE OF HEARING COE INME - ADULT SORENSON JUDGMENT ENTE Document Type 1.1 : MAGISTRATE'S DECISION - CHANGE O ating for Stacy to process. Select:	ATE'S DESCISION RY IF NAME - ADULT SORENSON MAGIN	07-11-2016 07-11-2016 07-11-2016 STRATE'S DESCISION	Edit Data S	On Behalf Of HANNON SORENSON:Applicant	Hy Signature David Farmer	Request Sign.
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- 2. Click the link under the "Case Number" column to open another window displaying information about the case.
- 3. On the "Case History" page, click expansion icon ("+") to see additional details of that listing. For instance, the user can view all the case participants or identifying information on submissions that have been filed as long as the case is not sealed or the user has security levels enabling viewing.

Figure 77: Case History

Response Contraction of the Cont	2 Montgome	016MSC0016 RY COUNTY PRO	9 : BATE COURT
Case Number 2016MSC00169 Case Type CHANGE OF NAME - ADULT Opened 07-13-2016 Case Status 0	e Participants	Plaintiff Defendant Judge/Magistrate Amt. of Claim Jury/Non Jury	SHANNON SORENSON DAVID FARMER \$.00 Non Jury
Applicant[s]			Counsel of Record
SHANNON SORENSON 1 STATE STREET DAYTON, OH 45402		MICHAEL WILLIAM 563 EAST 770 NO SALT LAKE CITY, U (801)555-1212	IS RTH JT 84097
Magistrate[s]			Counsel of Record
DAVID FARMER FARMERD@MCOHIO.ORG			
File Date		Case History	
07-11-2016 APPLICATION CHANGE OF NAME 07-11-2016 NOTICE OF HEARING ON CHANGE	- ADULT; ENTRY SETTING HEARI E OF NAME	NG;INDEX AND DO	CKETING
Clink	the link to view docu	ument.	

- 4. Click on the link under the "Case History" column to view a particular document. Depending upon the web browser and its configuration, either a new tab will open and display the document or a dialog box will appear.
- 5. If a dialog box opens, determine whether to open the file or save the file to a local computer, select the appropriate radio button, and click **OK**. The document will appear as instructed.
- 6. After the user has finished reviewing the "Case History" information, close the window. The "Action Details" page is still open.

Figure 78: Related Filings Awaiting Approval in Clerk Queue

adicial Queue Entry					
Case Number Case Title	Case Type	Opened Date Judge			
2016MSC00169 THE CIVIL CASE OF SHANNON SOREN:	SON CIVIL/MISCELLANEOUS	07-13-2016 DAVID FARMER			
elated Filings Awaiting Approval in Clerk Queue	2		1		
Document	File Date	Assigned To			
AFFIDAVIT	07-14-2016	Marianne Weikert			
AFFIDAVIT Affidavit					
New Danding Actions Cose Number 2016MCC	200160				
Juler Penuing Actions - Case Number 2010MSC	00109				
Title		Original Filer	File Date	Assigned To	Queue Name
PROPOSED JUDGMENT ENTRY - CHANGE OF NAME - ADU ENTRY	JLT SORENSON JUDGMENT	Michael Williams	07-14-2016		Judge Judicial-Queue
APPLICANT INFORMATION SORENSON APPLICANT INFOR	MATION	Michael Williams	07-14-2016		Mag Standard-Queue
Add Output Entry					

- 7. The next table on the page is the "Related Filings" section. Listed here are any related filings that are currently awaiting approval by clerk in the Filings Awaiting Approval queue. Click the "+" to expand the list. To download and view the document, click the blue link. Depending on the web browser being used and its configuration, clicking on the Related Filings Document link will either open another browser tab where the document will display or cause a dialog box to appear prompting the user to open or save the document.
- 8. Below this is the "Other Pending Actions" section. Here the judge can view additional filings that are awaiting action in either a judicial queue or a standard queue. Clicking on the title links will cause a warning dialog box to appear. The warning states the user will be routed to the queue entry that he or she has selected and will no longer be viewing the original queue entry.

Note: Be careful to verify which queue entry is open. Opening another pending action can lead to issues if the user believes work is being done on entry A when it is actually being completed on entry B.

To Queue Name
Judge Judicial-Queue
110

Figure 79: Other Pending Actions

9. The next table on the page is the "Document Information" section. This is information submitted by the filer and approved by the clerk for this filing. It includes the base information the judicial staff or judge will be acting upon as well as the other documents included in the filer's original submission. Clicking on a link under the "Document" column will, like the step above, open a copy of the listed document. These documents will usually be Microsoft Word (.doc or .docx) documents.

Figure 80: Document Information

Case Number	Case Title	Case Type C	Opened Date Judge					
2016MSC00169 THE CIV	IL CASE OF SHANNON SORENSON	I CIVIL/MISCELLANEOUS (07-13-2016 DAVID FARMER					
- I - A	Annual la clash Onna							
elated Filings Awarting	Document	File Date	Assigned To					
AFFIDAVIT	Document	07-14-2016	Marianne Weikert					
AFFIDAVIT Affidavit								
ther Pending Actions	- Case Number 2016MSC001	169						
	Title		Original Filer	File Date	Assigned To		Queu	ie Name
ROPOSED JUDGMENT EN	ITRY - CHANGE OF NAME - ADULT S	SORENSON JUDGMENT	- Michael Williams	07-14-2016			Judge Judicial-Oue	210
			There is a married to the second	07 11 2010			Sudge Sudicial Que	
NTRY	CORFNECH AND ICAN'T INFORMAT	TON	Minho of Mills and	07.14.2016			Man Chandrad On	
ENTRY APPLICANT INFORMATION	SORENSON APPLICANT INFORMAT	TION	Michael Williams	07-14-2016			Mag Standard-Qu	eue
ENTRY APPLICANT INFORMATION Add Queue Entry	SORENSON APPLICANT INFORMAT	TION	Michael Williams	07-14-2016			Mag Standard-Qu	eue
ENTRY APPLICANT INFORMATION Add Queue Entry	SORENSON APPLICANT INFORMAT	<u>TION</u>	Michael Williams	07-14-2016			Mag Standard-Qu	eue
ENTRY APPLICANT INFORMATION Add Queue Entry cument Information	SORENSON APPLICANT INFORMAT	<u>FION</u>	Michael Williams	07-14-2016			Mag Standard-Qu	eue
NTRY PPLICANT INFORMATION Add Queue Entry cument Information	SORENSON APPLICANT INFORMAT	Document	Michael Williams	07-14-2016 File Date		Assigi	Mag Standard-Qu	eue
NTRY PPLICANT INFORMATION add Queue Entry cument Information PLICATION FOR CHANGE	SORENSON APPLICANT INFORMAT	TION Document IG HEARING SORENSON A	Michael Williams	07-14-2016 File Date 07-11-2016	_	Assigi	Mag Standard-Qu ned To	eue
NTRY PPLICANT INFORMATION Add Queue Entry cument Information PLICATION FOR CHANGE PLICANT INFORMATION S	SORENSON APPLICANT INFORMAT	Document IG HEARING SORENSON A ION	Michael Williams	07-14-2016 File Date 07-11-2016 07-11-2016		Assign	Mag Standard-Qu ned To	eue
NTRY PPLICANT INFORMATION Add Queue Entry Cument Information PLICANT INFORMATION S PLICANT INFORMATION S DICTCE OF HEARING ON CH	SORENSON APPLICANT INFORMAT OF NAME - ADULT; ENTRY SETTIN SORENSON APPLICANT INFORMATI NAGE OF NAME SORENSON NOTIC	Document IG HEARING SORENSON A IGN CE OF HEARING	Michael Williams	07-14-2016 File Date 07-11-2016 07-11-2016		Assign	Mag Standard-Qu ned To	eue
NTRY PPLICANT INFORMATION add Queue Entry Cument Information PLICATION FOR CHANGE PLICATI INFORMATION S TOEC OF HEATING ON CI OPOSED MAGISTRATE'S.	SORENSON APPLICANT INFORMAT OF NAME - ADULT; ENTRY SETTIN ORENSON APPLICANT INFORMATE IANGE OF NAME SORENSON NOTIC DECISION - CHANGE OF NAME AN	Document IG: HEARING SORENSON A ICM CE OF HEARING DULT SORENSON MAGIST	Michael Williams PPLICATION NAME CHANGE RATE'S DESCISION	07-14-2016 File Date 07-11-2016 07-11-2016 07-11-2016 07-11-2016		Assigi	Mag Standard-Qu	eue
NTRY PPLICANT INFORMATION Add Queue Entry PLICATION FOR CHANGE PLICATI INFORMATION S VICE OF HEARING ON CF OPOSED MAGISTRATE'S OPOSED JUDGMENT ENT	SORENSON APPLICANT INFORMAT OF NAME - ADULT; ENTRY SETTIN ORENSON APPLICANT INFORMATIC INAGE OF NAME SORENSON NOTIC DECISION - CHANGE OF NAME - ADULT SO	Document IG HEARING SORENSON A ICM CE OF HEARING DULT SORENSON MAGISTI SORENSON JUDGMENT EN	Michael Williams PPLICATION NAME CHANGE RATE'S DESCISION TRY	07-14-2016 File Date 07-11-2016 07-11-2016 07-11-2016 07-11-2016		Assign	Mag Standard-Qu	eue
NTRY PPLICATT INFORMATION Add Queue Entry Cument Information PPLICATION FOR CHANGE PPLICATT INFORMATION S DTICE OF HEARING ON CF VEOPOSED MIGUITATES ROPOSED MIGUMENT ENT	SORENSON APPLICANT INFORMAT OF NAME - ADULT: ENTRY SETTIN ORENSON APPLICANT INFORMATI INAGE OF NAME SORENSON NOTIC DECISION - CHANGE OF NAME - ADULT SE RY - CHANGE OF NAME - ADULT SE	Document KG HEARING SORENSON A ION CE OF HEARING DUIT.SORENSON MAGIST KORENSON JUDGMENT EN	Michael Williams PPLICATION NAME CHANGE RATE'S DESCISION TRY	07-14-2016 7-11-2016 07-11-2016 07-11-2016 07-11-2016 07-11-2016		Assig	Mag Standard-Qu	eue
NTRY Add Queue Entry cument Information PPLICATION FOR CHANGE PPLICATION FOR CHANGE PPLICATI INFORMATION S OTICE OF HEARING ON C ROPOSED MAGISTRATE'S ROPOSED JUDGMENT ENT W Submission	SORENSON APPLICANT INFORMAT OF NAME - ADULT; ENTRY SETTIN ORENSON APPLICANT INFORMATE NAME OF NAME SORENSON NOTIC DECISION - CHANGE OF NAME - AD RY - CHANGE OF NAME - ADULT S	Document IG HEARING SORENSON A ION CE OF HEARING DUILT SORENSON MAGIST IORENSON JUDGMENT EN	Michael Williams PPLICATION NAME CHANGE RATE'S DESCISION TRY	07-14-2016 7-11-2016 07-11-2016 07-11-2016 07-11-2016 07-11-2016 07-11-2016		Assig	Mag Standard-Qu ned To	eue

- 10. Depending on the web browser being used and its configuration, clicking the Document link will either open another browser tab where the document will display or cause a dialog box to appear prompting the user to open or save the document.
- 11. The "New Define Order" lists the new document the judicial staff or judge will be creating if the judge determines to grant the order. The user can view the filer's document by clicking the view icon. Once opened, because the document is a Word document, the document can be edited and re-saved if appropriate.

Figure 81: New Define Order

Case Number	Case Title	Case Type	Opened Date Judge			
2016MSC00169 THE C	IVIL CASE OF SHANNON SORENSON	CIVIL/MISCELLANEOUS	07-13-2016 DAVID FARMER			
lated Filings Awaitin	ng Approval in Clerk Queue					
5	Document	File Date	Assigned To			
AFFIDAVIT		07-14-2016	Marianne Weikert			
AFFIDAVIT Affidavit						
ther Pending Action:	s - Case Number 2016MSC00	169				
-	Title		Original Eller	Ele Date	Assigned To	Queue Name
	NTRY CHANCE OF NAME ADULT	CODENICON JUDGMENT	Original files	The Date	Assigned to	
ROPOSED JUDGMENT E	INTRY - CHANGE OF NAME - ADULT	SOREINSON JUDGHENT		07 11 0010		
ROPOSED JUDGMENT E VTRY	INTRY - CHANGE OF NAME - ADULT	SORENSON JUDGMENT	Michael Williams	07-14-2016		Judge Judical-Queue
<u>Roposed Judgment e</u> <u>NTRY</u> <u>PPLICANT INFORMATIO</u>	N SORENSON APPLICANT INFORMAT		Michael Williams Michael Williams	07-14-2016 07-14-2016		Mag Standard-Queue
PROPOSED JUDGMENT E	NTRY - CHANGE OF NAME - ADULT	<u>ION</u>	Michael Williams Michael Williams	07-14-2016		Judge Judical-Queue Mag Standard-Queue
ROPOSED JUDGMENT E INTRY IPPLICANT INFORMATION Add Queue Entry	N SORENSON APPLICANT INFORMAT	<u>IION</u>	Michael Willams Michael Willams	07-14-2016 07-14-2016		Judge Judical-Queue
ROPOSED JUDGMENT E NTRY PPLICANT INFORMATION	N SORENSON APPLICANT INFORMAT	<u>TION</u>	Michael Williams Michael Williams	07-14-2016 07-14-2016		Judge Judical-Queue Mag Standard-Queue
ROPOSED JUDGMENT E NTRY PPLICANT INFORMATIO Add Queue Entry)	NIKT - CHANGE OF NAME - ADDLT	ION	Michael Williams Michael Williams	07-14-2016 07-14-2016		Judge Judical-Queue
ROPOSED JUDGMENT E NTRY PPLICANT INFORMATION (dd Queue Entry)	NIRF - CHARGE OF NAME - ADOLT	Document	Michael Williams Michael Williams	07-14-2016 07-14-2016 File Date	Assig	Mag Standard-Queue
ROPOSED JUDGMENT E NTRY PPLICANT INFORMATION add Queue Entry) cument Information	NIKT - CHARGE OF NAME - RUOLT N SORENSON APPLICANT INFORMAT	TION Document IG HEARING SORENSON A	Michael Williams Michael Williams	07-14-2016 07-14-2016 File Date 07-11-2016	Assig	Juage Juaica-Queue Mag Standard-Queue med To
OPOSED JUDGMENT E JTRY PPLICANT INFORMATION dd Queue Entry cument Information PLICATION FOR CHANG PLICANT INFORMATION	NIKE - CHARGE OF PARE - ADULT IN SORENSON APPLICANT INFORMAT	Document IGN IG HEARING SORENSON A	Michael Williams Michael Williams APPLICATION NAME CHANGE	07-14-2016 07-14-2016 File Date 07-11-2016 07-11-2016	Assig	Juage Juanca-Queue Mag Standard-Queue med To
ROPOSED JUDGMENT E JTRY PPLICANT INFORMATION add Queue Entry Cument Information PLICATION FOR CHANG PLICANT INFORMATION TICE OF HEARING ON C	NIKE - UPARKE UP PARE - ADULT N SORENSON APPLICANT INFORMAT E OF NAME - ADULT; ENTRY SETTIN SORENSON APPLICANT INFORMAT HANGE OF NAME SORENSON NOT	Document IG HEARING SORENSON A ON E OF HEARING	Michael Williams Michael Williams PPLICATION NAME CHANGE	07-14-2016 07-14-2016 07-11-2016 07-11-2016 07-11-2016 07-11-2016	Assig	Judge Judica-Queue Mag Standard-Queue ned To
ROPOSED JUDGMENT F MTRY PPLICANT INFORMATIO Cument Information PLICATION FOR CHANG PLICATION FOR CHANG PLICATION FOR CHANG DOCSED MAGISTRATES	NIKE - LOWKE OF DARE - ADULT N SORENSON APPLICANT INFORMAT E OF NAME - ADULT: ENTRY SETTIN SORENSON APPLICANT INFORMAT HANGE OF NAME SORENSON NOTIX DECISION - CHANGE OF NAME - AD	Document IGN Document IG HEARING SORENSON A SON CE OF HEARING JULT SORENSON MAGIST	Michael Williams Michael Williams AppLiCATION NAME CHANGE RATE'S DESCISION	07-14-2016 07-14-2016 07-11-2016 07-11-2016 07-11-2016 07-11-2016 07-11-2016	Assig	Judge Judica-Queue Mag Standard-Queue
ROPOSED JUDGMENT E MTRY PPLICANT INFORMATION sidd Queue Entry PLICATION FOR CHANG PLICATION FOR CHANG PLICANT INFORMATION TICE: OF HEARING ON C OPOSED JUDGMENT EN	NINT - UPARLE UP PARLE - ADULT. IN SORENSON APPLICANT INFORMAT E OF NAME - ADULT, ENTRY SETTIN SORENSON APPLICANT INFORMATI HANGE OF NAME SORENSON NOTK DECISION - CHANGE OF NAME - AG	Document IGN IG HEARING SORENSON A ON EE OF HEARING DULT SORENSON MAGIST ORENSON JUDGMENT EN	Michael Williams Michael Williams APPLICATION NAME CHANGE IRATE'S DESCISION	07-14-2016 07-14-2016 07-11-2016 07-11-2016 07-11-2016 07-11-2016 07-11-2016 07-11-2016	Assig	Judge Judica-Queue Mag Standard-Queue med To
ROPOSED JUDGMENT E WTRY PPLICANT INFORMATION kid Queue Entry Cument Information PLICATION FOR CHANG PLICATION FOR CHANG PLICATI INFORMATION TICE OF HEATING ON C OPOSED MAGISTRATE'S OPOSED JUDGMENT EN	NIKE - LINAKE UP HARE - ADULT N SORENSON APPLICANT INFORMAT E OF NAME - ADULT; ENTRY SETTIN SORENSON APPLICANT INFORMAT THANEG OF NAME SORENSON NOTS DECISION - CHANGE OF NAME - AT ITRY - CHANGE OF NAME - ADULT S	Document IG HEARING SORENSON A ON E OF HEARING DULT SORENSON MIGIST ORENSON JUDGMENT EN	Michael Williams Michael Williams PPLICATION NAME CHANGE RATE'S DESCISION TTRY	07-14-2016 07-14-2016 07-11-2016 07-11-2016 07-11-2016 07-11-2016 07-11-2016 07-11-2016	Assig	Judge Judica-Queue Mag Standard-Queue ned To
REPOSED JUDGMENT E MIRY PPLICANT INFORMATION Add Queue Entry cument Information PLICATION FOR CHANGE PLICANT INFORMATION OFFICE OF HEARING ON CONSECT MAGISTRATE'S CONSECT MAGISTRATE'S	NINE - LINANGE OF NAME - ADULT IN SORENSON APPLICANT INFORMAT E OF NAME - ADULT; ENTRY SETTIN SORENSON APPLICANT INFORMAT HANGE OF NAME SORENSON NOTIC DECISION - CHANGE OF NAME A TIRY - CHANGE OF NAME - ADULT S	Document IGN IGN HEARING SORENSON / IGN EE OF HEARING EE OF HEARING ON TSORENSON JUDGMENT EN	Michael Williams Michael Williams APPLICATION NAME CHANGE IRATE'S DESCISION ITRY	07-14-2016 07-14-2016 07-11-2016 07-11-2016 07-11-2016 07-11-2016 07-11-2016 07-11-2016	Assig	Judge Judica-Queue Mag Standard-Queue med To
ROPOSED JUDGMENT E ITRY VIRY VIRY Cument Information PLICATION FOR CHANG PLICATION FOR CHANG PLICATI INFORMATION TOTCE OF HEARING ON COPOSED MUDGMENT EN W Submission	NIKE - LOWIGE OF DAME - AOULT I SORENSON APPLICANT INFORMAT E OF NAME - ADULT: ENTRY SETTIN SORENSON APPLICANT INFORMATI HANGE OF NAME SORENSON NOTIT SORENSON APPLICANT INFORMATI HANGE OF NAME - ADULT S	Document IGN GHEARING SORENSON A ON CE OF HEARING ORENSON JUDGMENT EN DOCEMBER THOS	Michael Williams Michael Williams APPLICATION NAME CHANGE RATE'S DESCISION TIRY	07-14-2016 07-14-2016 07-11-2016 07-11-2016 07-11-2016 07-11-2016 07-11-2016 07-11-2016 07-11-2016	Assig	Judge Judica-Queue Mag Standard-Queue med To Mu Skonstance Request Store

12. The user may need to upload a document because of changes within the original document or a change of file format. To do so, click on the "Replace Document" 💀 icon.

Figure 82: Replace Document Page

Home	Filings	CASEaDia	My Profile	Logout		user: David M. Farmer
My Queue Er	<u>tries</u> ⇒ <u>Jud</u>	icial Queue Ent	<u>ry</u> ⇒ Replace	Document		
Replace	Docume	ent				
*Required Fig	elds					
Description	MAGIS	TRATE'S DECI	ISION - CHANG	GE OF NAME - ADU	т	
File:	* Brow	wse No fi	le selected.			
Cancel	Replace	Document				

13. The user is then taken to the "Replace Document" page. They can upload a different document by clicking **Browse** and, after finding the correct file, attach it by clicking **Replace Document**. This returns the user to the "Action Details" page.

Note: Clicking **Cancel** returns the user to the "Action Details" page without making any changes to the document displayed.

Figure 83: Remove Replaced Document Icon

New Submission		You have selected to remove a document from this filing.
View Remove Replace Document	Document Type	J
	MSC_21.1.1 : MAGISTRATE'S DECISION - CHANGE OF NAME - ,	Remove the document?
		OK Cancel

14. Clicking the Remove icon either next to the filer's original document or next to a document uploaded by the clerk or judicial assistant will remove the document. A Warning box will open asking if the user wants to delete the document.

Figure 84: New Define Order

Use Filer's Document		▼.
OR		
Upload Document	Browse No file selected.	
Document Type	AFFIDAVIT -	•
Additional Text		bbA

- 15. Clicking **OK** removes the document but opens a new section asking the user to select a document to include with the filing.
- 16. **Optional:** If the clerk or judicial assistant is not going to finish processing the queue entry at this time, he or she can select "Use Filer's Document" to restore the "New Define Order" to its original state. Select the document and click **Add**.

Figure 85: Restoring Filer's Document to Original State

ew Submission	
Use Filer's Document	PROPOSED MAGISTRATE'S DECISION - CHANGE OF NAME - ADULT SORENSON MAGISTRATE'S DESCISION
OR	
Upload Document	Browse No file selected.
Document Type	AFFIDAVIT
Additional Text	SORENSON MAGISTRATE'S DESCISION

17. To add a document as required, the user will browse his or her local computer to select the document with the changes. After changing the document type appropriately and adding Additional Text, click the **Add** button to upload the corrected document.

Figure 86: Uploading a Document

Use Filer's Document		•
OR		
Upload Document	Browse No file selected.	
Document Type	AFFIDAVIT	
Additional Text	Add	

- 18. The "On Behalf of" field must be populated in order to be allowed to complete final action on the Judicial Queue Entry page.
- 19. Also located in the "New Define Order" section is the "My Signature" column. If the user is the appropriate person to sign the document and has a signature uploaded, he/she can select a signature from the "My Signature" drop-down.

Figure 87: My Signature Drop Down

New	Submis	ssion						
View	Remove	Replace Document	Document Type	Additional Docket Text	Edit Data	On Behalf Of	My Signature	Request Signature
	.	-	MSC_21.1.1 : MAGISTRATE'S DECISION - CHANGE OF NAME - ADULT	MILLER MAGISTRATE'S DECISION		VICKY MILLER: Applicant 👻	David Farmer 🔹	

20. If the user is a gatekeeper and will be reassigning the queue entry to a magistrate or judge for a signature, if instructed by the magistrate or judge on the particular document needing a signature, the gatekeeper may place a checkmark in the "Request Signature" checkbox. Make sure that in the "My Signature" dropdown, nothing is selected. This will route the queue entry to a "Signature Queue" where the judge or magistrate can complete a mass signature action.

Figure 88: Require Signature Checkbox

New Sub	mission						
View Rem	ove Replace Document	Document Type	Additional Docket Text	Edit Data	On Behalf Of	My Signature	Request Signature
	4 - a	MSC_21.1.1 : MAGISTRATE'S DECISION - CHANGE OF NAME - ADULT	MILLER MAGISTRATE'S DECISION		VICKY MILLER: Applicant 👻	David Farmer 🔹	

21. Below the "New Define Order" section is the "Note from Filer" and "Note History." Click the expansion icon ("+") to view any hidden information. If no notes are included with this filing, the word "None" will appear next to the note entry.

Figure 89: Note from Filer and Note History

	ice Document		Document Type	Additional Docket Text	Edit Data	On Behalf Of	My Signature	Request Signatur
	🕘 📓 мз	C 21.1.1 : MAGISTR	ATE'S DECISION - CHANGE OF NAME - ADULT MIL	ER MAGISTRATE'S DECISION		VICKY MILLER Applicant	David Earmer	
						VICKI PILLERAPPICUIC	David Furfici	
ote from Filer:	None							
ote from Court	Stacy Coleman - Th	is is waiting for Stacy	to process.					
ote History: 🗉								
Date	From	То	Note					
2016-07-13	Stacy Coleman	Stacy Coleman	This is waiting for Stacy to process.					
2016-07-13	David Farmer	David Farmer	Added signature. Ok to proceed.					
2016-07-11	Stacy Coleman	David Farmer	This is a Tybera case.					
ote to Clerk/Co	urt Staff:		Select:					
				.4				
				it				
ote to Filer:	Selec	t:	•	.ti				
lote to Filer:	Selec	t	•	h.				
ote to Filer:	Selec	t:	T	.4				
ote to Filer:	Selec	t:	-	ii.				
ote to Filer:	Selec	t:		a. A				
lote to Filer:	Selec	t:	-	it. It				
ote to Filer: ction:	Selec	t:		.d .d		ata Bafanad		
ote to Filer: ction: ⑦ Sign and St	Selec	t:	• ueue © Reassign Queue:	.d. .d. •) To:	-	ate Deferred		

22. Before completing action on this page, in the textbox provided, the user may add a note to be included with this case. If the entry is being reassigned, for instance from a judicial assistant/gatekeeper to a judge, the note will be displayed for the person to whom the filing has been reassigned. If the filing is being signed and submitted, the note will appear for the next court employee. For example, a proposed order being changed to an order becomes a new filing and the order filed by the judge will appear in the "Awaiting Approval" queue for a clerk to approve. The clerk will be able to see the judge's note.

Figure 90: Note to Clerk/Court Staff

lote to Clerk/Court Staff: Select:	Set for hearing		
All is appropriate. Please move forward.			
		.4	
lote to Filer: Select:	•		
		.4	
Action:			
$igodoldsymbol{ imes}$ Sign and Submit Document $igodoldsymbol{ imes}$ Remove from Queue	© Reassign Queue:	▼ To:	✓ Date Deferred
Back Sign/Remove/Reassign			

23. Below the "Note to Clerk/Court Staff" is a "Note to Filer" field. Here the user can enter comments or instruction specifically for the filer.

Figure 91: Note to Filer

Note to Clerk/Court Staff:	S	Select:	•		
				it.	
Note to Filer:	Select: Corrupted Docum	nent 🔻			
Your document has issues with	the layout elements being skev	wed. Please clean up and re-subr	nit.		
				.4	
Action:					
Submit Document	Remove from Queue	Reassign Queue:		▼ To:	▼ Date Deferred

- 24. Click the appropriate radio button for this case: "Sign and Submit Document," "Remove from Queue," or "Reassign to." The user must complete the next step before the actions are saved and recorded. "Reassign To" gives the user the option to select to whom they wish to assign the filing.
- 25. Click the **Sign/Return/Reassign** button to complete the action.

Figure 92: Action Radio Buttons

Note to Filer: Select: Corrupted Document	
	đ
Action: O Submit Document Remove from Queue Reassign Queue: Bark Remove/Reassin	▼ To: ▼ Date Deferred

26. **Optional:** Click the **Back** button to return to the "My Queue Entries" page without taking any action on the case just viewed.

Using Signature Queue Mass Signature Function from "My Queue Entries"

The eFlex system provides a means that allows judges to quickly sign multiple, non-substantive judicial entries. The process requires both that a primary signature be in place on the judge's profile and that the judge have a gatekeeper, such as a judicial assistant.

- 1. Judicial Queue entries for a particular judge route to his or her gatekeeper as designated in the judge's or magistrate's eFlex profile.
- 2. The gatekeeper reviews the entry and makes the necessary changes as described in the above sections on using the judicial queue.

3. The gatekeeper checkmarks the "Req Signature" box to request the judge's or magistrate's signature. This is the trigger that will send the entry to the Signature Queue.

Figure 93: Requesting a Signature



4. The gatekeeper reassigns the entry to the judge.

Figure 94: Reassigning to a Magistrate or Judge

ction:			
Sign and Submit Document Remove from Queue	Reassign Queue: Mag Judicial-Queue	▼ To: Catharine Kidd ▼	Date Deferred
5			

- 5. Upon logging into the system, the judge selects "View Queues" from the home page or, from the menu bar, selects **Filings > Action Queues**.
- 6. On the "Queue" filter at the top of the "My Queue Entries" page, the judge selects "Signature Queues." If the page does not automatically refresh, click the **Refresh** button. Every item listing on the refreshed page has had a manual request for signature applied.

Figure 95: Signature Queues

My Queue En MONTGOMERY C Fiter By View Entrie Search By: All Go C Add Queue Entry	IV Queue Entries											
Oueue Entry Id	Tracking #	Queue	Title	Case Title	Case Number	Days In Queue	Original File	Assigned To	Division Number	Deferred Date		
🔲 1158 📲	1438	Mag Judicial-Queue	PROPOSED MAGISTRATE'S DECISION - CHANGE OF NAME - ADULT LASSITER MAGISTRATES DECISION	THE CIVIL CASE OF LACEE LASSITER	2016MSC00168	0	Michael Williams	David Farmer	C::DF	2016-07-14		
🔲 1154 📲	1436	Mag Judicial-Queue	PROPOSED MAGISTRATE'S DECISION - CHANGE OF NAME - ADULT BUTRAND MAGISTRATE'S DECISION	THE CIVIL CASE OF EDWIN BUTRAND	2016MSC00167	0	Michael Williams	David Farmer	C::DF	2016-07-14		
🔲 1151 🔒	1441	Mag Judicial-Queue	PROPOSED MAGISTRATE'S DECISION - CHANGE OF NAME - ADULT MILLER MAGISTRATE'S DECISION	THE CIVIL CASE OF VICKY MILLER	2016MSC00170	0	Michael Williams	David Farmer	C::DF	2016-07-14		
Sign)elete			1								

7. The magistrate or judge can look at the entry identifications under the "Queue" column or the "Title" column to determine if he or she has any questions about any entry. If so, the entry can be accessed as normal by clicking on the Title link. Otherwise, the magistrate or judge can select the checkbox in the table header to select all the entries listed or can manually select the entries to which he or she wants to apply the primary signature.

Note: If an entry in the Signature Queue is not assigned to the user who is logged into the eFlex system (ie: is assigned to a different magistrate or judge), the queue entry will display, but there will not be a checkbox to the left of it. A checkbox will only appear beside a signature queue entry that is assigned to the user who is logged in.

Figure 96: Applying Signature

Filter By View Entries in: Signature Queues All Users Review Date: Today's Items Search By: All Go Clear Search 										
Add Queue	Entry	Queue	Number of entri	es displayed per page: 50 Case Title	Cace Number					
1158 4	1438	Mag Judicial-Queue	PROPOSED MAGISTRATE'S DECISION - CHANGE OF NAME - ADULT LASSITER MAGISTRATES DECISION	THE CIVIL CASE OF LACEE LASSITER	2016MSC00168 0					
🗹 1154 🔒	1436	Mag Judicial-Queue	PROPOSED MAGISTRATE'S DECISION - CHANGE OF NAME - ADULT BUTRAND MAGISTRATE'S DECISION	THE CIVIL CASE OF EDWIN BUTRAND	2016MSC00167 0					
	1441	Mag Judicial-Queue	PROPOSED MAGISTRATE'S DECISION - CHANGE OF NAME - ADULT MILLER	THE CIVIL CASE OF VICKY MILLER	2016MSC00170 0					

8. Once the appropriate entries are selected, clicking **Sign** at the bottom of the Signature Queue listing will apply the magistrate's or judge's primary signature on a signature page attached to the end of the document. The page again refreshes and the entries are no longer listed (if there are only a few) or the entries are listed with a checkmark to the left until they are finished processing (if there are several entries it may take a little time to process).

Figure 97: Signed Items Indicated by Checkmark

My Queue Er	tries									
MONTGOMERY (OUNTY F	ROBATE								
Filter By View Entrie	s in: Signa	ature Queues 🔹 🔻 Assign	ned To: All Users	eview Date: Today's Items 🔻						
Search By: All		•								
G0	Clear Search									
Add Queue Entry)									
			Number of entri	ies displayed per page: 50 ▼						
Oueue Entry Io	Tracking #	Queue	Title	Case Title	Case Number	Days In Queue	Original File	Assigned To	Division Number	Deferred Date
🖌 1158 着	1438	Mag Judicial-Queue	THE CIVIL CASE OF LACEE LASSITER	THE CIVIL CASE OF LACEE LASSITER	2016MSC00168	o l	Michael Williams	David Farmer	C::DF	2016-07-14
🖌 1154 🐴	1436	Mag Judicial-Queue	THE CIVIL CASE OF EDWIN BUTRAND	THE CIVIL CASE OF EDWIN BUTRAND	2016MSC00167	0	Michael Williams	David Farmer	C::DF	2016-07-14
🖌 1151 🔒	1441	Mag Judicial-Queue	THE CIVIL CASE OF VICKY MILLER	THE CIVIL CASE OF VICKY MILLER	2016MSC00170	D	Michael Williams	David Farmer	C::DF	2016-07-14
				1						
Sign)elete									

CASEaDIA

Understanding CASEaDIA

Tybera's Binder technology is an add-on feature to its electronic filing software, eFlex. As a stand-alone product, Tybera refers to this technology as CASEaDia. Tybera's binder technology allows judges or their support staff to aggregate multiple documents and cases into a single portable document format (PDF) file. Its name, CASEaDia, is derived from the phrase 'case-a-day.'

The term 'Binder' comes from the Adobe[®] Acrobat[®] program, which is used to generate documents in the PDF format. Adobe's term "Binder" refers to a group of documents that have been collected and combined into one document.

An electronic binder functions in essentially the same way as a three ring binder; it is a means of organizing a set of documents with bookmarks in a manner to make accessing and reviewing the documents both quick and easy.

There are several different uses for binders in courts today. The first way to use a binder is as a Multi-Case Binder. Creating a binder that contains multiple cases allows the user to view those cases in one document. For each case listed in the binder, there may be several documents pertaining to the case included with the basic case information. An example of a binder set up with multiple cases listed would be a binder created for a judge's schedule of cases for a day.

Binders can also be created based on a single case. The Single Case Binder would be a single PDF document containing many or all of the case documents of a specific case. This approach to creating a binder is particularly effective with a case that has had several actions or many documents and attachments. The documents in a Single Case Binder are, by default, listed in reverse chronological

order, with the last documents submitted listed first. The Single Case Binder has the option of being auto-updated when additional filings to the case are submitted.

The final possible type of binder is the Appellate Binder. The Appellate Binder is similar to the Single Case Binder in that the Appellate Case Binder is focused on only one case. The Appellate Case Binder is different than a Single Case Binder in that the documents included are listed in a chronological order, meaning that the first document listed is the first document that was filed. The Appellate Case Binder does not have the auto-update function.

Although the primary focus of the binder software is to give judges the ability to easily access and review documents while they are either in a court session or at home, some court systems rely on a binder containing documents relevant to a single case as their tool in providing the media with the documents they require.

Binders with a single case have been used by courts to provide or sell copies of high profile cases to the media. The completed binders are simply saved to CD and distributed, saving the court time and printing costs.

The remainder of this User's Manual will guide you through the steps in creating, updating, deleting, and using binders.

Binder Creation

Access to the Binder functions of the system is gained through the Court Review Interface. Because binders are a feature of the trusted zone, they are not available for viewing through the public Filer Interface. The role a user is assigned in the Court Review Interface will determine what level of access the user will have in working with binders on the system. Generally, judicial assistants, or in some cases, clerks, will be responsible for creating binders.

- 1. To create a binder, the user must be logged into the Court Review Interface.
- 2. After logging in, select **CASEaDia** from the menu bar at the top of any page in the Court Review Interface to be routed to the Binders page. From this page, you will be able to view a list of all current binders of any type or take the first step in creating a new binder. The list of binders will be specific to the court location with which the user is associated.

Note: Binders are automatically deleted after a configurable period of time following the Event Date. The default time period is 90 days.

Binders	
Court: MONTGOMERY COUNTY PROBATE New binder: Single Multi Appellate	Binders with a single case could be titled with the case information. Binders with
Name: * Case Number: Event Date: Prepared for: * Auto Update: Create	with a courtroom location or some other distinguishing information.
Existing binders: Fiter by All Refresh Delete Binder Generate Binder	Entries per page: 50 🔻
View Binder Name Type Judge Generated Da 2016MSC00141 Single Catharine Kidd 06/23/2016 09 Name Changes CDK Multi Catharine Kidd 06/23/2016 09 1 1 1 1 1 1	Auto Update Up To Date Gen. Day Change Gen. Day 0:16
Delete Binder Generate Binder	

Figure 98: Creating a Binder from the Multi-Case Binders Page

Multi-Case Binder Creation

- 1. On the "Binders" page, in the New Binder section at the top of the page, select the Multi radio button instead of the Single default choice.
- 2. Fill in the Name field with the name of the binder to be created. The name needs to be unique to this binder. Be sure the name distinguishes it from other, similar binders. For example, the name may include the type of cases or the courtroom location.
- 3. Next, using the Calendar popup that appears when the user clicks into the Event Date field, select the correct Event Date. This date will help to distinguish this binder from similar multicase binders.
- 4. With the **Prepared For** drop-down menu, select the assigned judge or magistrate.
- 5. Click the **Create** button. The Binder Details pages opens.

Figure 99: Newly Created Binder on Binder Details Page

inder De	tails				_		
Name:	Name Changes Magistrate Farmer			Eve	ent Date: (07/21/2016	5
Judge:	dge: David Farmer 🔻						
Owner:	Administrator,	System		Gei	nerated:		
pdated By:	Administrator,	System		Date U	Jpdated:	2016-07-14	4 16:43:32.
Back	Generate	Add D	ocs Add Header	Expand All	Collapse All)	
Тор	Sub		Description	Filed On	link	Size	Filer
Back	Generate	Add D	ocs Add Header	Expand All C	ollapse All		

6. The Create action creates a binder that will receive the documents that will be selected, but it does not yet generate the binder. A generated binder will be viewable as a pdf through which one can navigate by way of bookmarks. The Binder Details page is the page from which the user will initiate population of the binder and view the organization of documents that have been added to the binder.

Single Case Binder Creation

- 1. On the "Binders" page, in the New Binder section at the top of the page, verify that the radio button for Single is selected.
- 2. Enter the Case Number for which the Single Case Binder is being created.
- 3. Fill in the Name field with the name of the binder to be created. The name needs to be unique to this binder. Be sure the name distinguishes it from other, similar binders. Generally, the name field will be populated with the case title, which will automatically fill in if the user clicks into the Name field.
- 4. With the **Prepared For** drop-down menu, select the assigned judge or magistrate.
- 5. Unlike the above four required fields, the Auto Update checkbox is optional.
- 6. Selecting Auto-Update will cause any documents filed after the creation/generation of the binder to be added to the binder list upon approval. The CASEaDia product runs a check and updates all Single Case Generated Binders for which subsequent documents have been added to the list. This check is run based on the time frame the creator of the binder selects as is described later in the "Change Queue" step of these instructions.
- 7. Optional: If there are documents, such as legal research gathered by a staff attorney, stored on a local machine or network that are to be included in the Single Case Binder, click Create Binder. The Create action creates a binder that will receive the documents that will be selected, but it

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does not yet generate the binder. Clicking Create Binder routes the user to the Binder Details page where all case documents are listed. From the Binder Details page, the user will be able to initiate the manual addition of pdf documents that are not part of the case history.

8. **Optional:** If the only documents necessary for the binder are those documents recorded on the case history, click **Generate Binder**. The Binders page refreshes, the new binder is listed on the Existing Binders Table, and the "Generated Date" column indicates a status of "Submitted." The user may click the **Refresh** button, which, when the binder generation has completed, will cause a "Generated Icon" to display in a column to the left of the binder Name and a date and time to display in the "Generated Date" column.

Court: MONIGO	MERT COUNTT PROB								
New binder:									
) Single 🔘 Mu	ulti 🔘 Appellate								
Name: *									
Case Number:									
Event Date:									
Prepared for: *		•							
Auto Update:									
opuucoi									
Create									
Existing binder	rs:								
Existing binder	rs:	Refresh							
Existing binder Filter by All	rs:	Refresh							
Existing binder Fiter by All Delete Binder	rs: Generate Binder	Refresh				Entries per pa	age: 50	•	
Existing binder Filter by All Delete Binder View Binder	rs: Generate Binder	Refresh)	Type A Judge	Generated Date	Auto Update	Entries per pa	age: 50 Gen. Day	▼ Change Gen. Da	v
Existing binder Filter by All Delete Binder	rs: Generate Binder Name 2016MSC00141	Refresh)	Type A Judge Single Catharine Kir	Generated Date Id 06/23/2016 09:16	Auto Update	Entries per pa e Up To Date g	age: 50 Gen. Day	▼ Change Gen. Da	Y.
Existing binder Filter by All Delete Binder View Binder	Generate Binder	Refresh)	Type AJudge Single Catharine Kid Multi Catharine Kid	Generated Date Id 06/23/2016 09:16 Id 06/23/2016 09:14	Auto Update	Entries per pa	age: 50 Gen. Day	▼ Change Gen. Da	Ŋ
Existing binder Filter by All Delete Binder	Generate Binder Mame 2016/MSC00141 Name Changes CDK Edwin Butrand	Refresh	Type Judge Single Catharine Kic Multi Catharine Kic Single David Farme	Generated Date id 06/23/2016 09:16 id 06/23/2016 09:14 r	Auto Update	Entries per pa e Up To Date g	age: 50 <u>ien. Dar</u> (Change Gen. Da	Y.
Existing binder Filter by All Delete Binder	Generate Binder Mame 2016MSC00141 Name Changes CDK Edwin Butrand Name Changes Magis	Refresh)	Type Single Catharine Kic Multi Catharine Kic Single David Farme Multi David Farme	Generated Date id 06/23/2016 09:16 id 06/23/2016 09:14 r	Auto Update	Entries per pa	age: 50	Change Gen. Da	Y
Existing binder Filter by All Delete Binder	rs: Generate Binder Name 2016MSC00141 Name Changes CDK Edwin Butrand Name Changes Magis	Refresh)	Type Single Catharine Kic Multi Catharine Kic Single David Farme Multi David Farme	Generated Date dd 06/23/2016 09:16 dd 06/23/2016 09:14 r r 1	Auto Update	Entries per pa	age: 50 Gen. Dar	Change Gen. Da Daily Sunday	Y
Existing binder Filter by All Delete Binder	rs: Generate Binder Name 2016MSC00141 Name Changes CDK Edwin Butrand Name Changes Magis Generate Binder	Refresh)	Type Single Catharine Kir Multi Catharine Kir Single David Farme Multi David Farme	Generated Date dd 06/23/2016 09:16 dd 06/23/2016 09:14 r r 1	Auto Update	Entries per pa	age: 50	Change Gen. Da Change Gen. Da Uaily Sunday Monday	Y

Figure 100: Adding Time Configuration for Auto-Update

- Once the Single Case Binder has been created or generated and is listed on the "Existing Binders" table, to the right of the binder listing are additional columns labelled "Up to Date," "Gen. Day," "#," and "Change Gen. Day."
- 10. Click on the dropdown under the "Change Gen. Day" column. Select a day of the week that the system will automatically check for updates to the case and re-generate the Single Case Binder.

Selecting "Daily" will cause the system to make checks on a daily basis to auto update the Single Case Binder.

- 11. When the Gen. Day link is used to edit a day of the week or Daily, the user is routed to the Queue Details page. All of the Single Case Binders that are configured to be auto updated on the day selected are listed on the Queue Details page. Be sure any changes have been saved and click **Back** to return to the Binders page.
- 12. The "Up to Date" column will display a "Yes" if the generated binder contains all the documents recorded in the case history at the time the user entered the Binders page.

Appellate Case Binder

- 1. On the "Binders" page, in the New Binder section at the top of the page, select the Appellate radio button instead of the Single default choice.
- 2. Enter the Case Number for which the Appellate Case Binder is being created.
- 3. Fill in the Name field with the name of the binder to be created. The name needs to be unique to this binder. Be sure the name distinguishes it from other, similar binders. Generally, the name field will be populated with the case title, which will automatically fill in if the user clicks into the Name field.
- 4. With the **Prepared For** drop-down menu, select the assigned judge or magistrate.
- 5. Optional: If there are documents, such as legal research gathered by a staff attorney, stored on a local machine or network that are to be included in the Single Case Binder, click Create Binder. The Create action creates a binder that will receive the documents that will be selected, but it does not yet generate the binder. Clicking Create Binder routes the user to the Binder Details page where all case documents are listed. From the Binder Details page, the user will be able to initiate the manual addition of pdf documents that are not part of the case history.
- 6. **Optional:** If the only documents necessary for the binder are those documents recorded on the case history, click **Generate Binder**. The Binders page refreshes, the new binder is listed on the Existing Binders Table, and the "Generated Date" column indicates a status of "Submitted." The user may click the **Refresh** button, which, when the binder generation has completed, will cause a "Generated Icon" to display in a column to the left of the binder Name and a date and time to display in the "Generated Date" column.

Manually Adding Documents to a Binder

Adding Documents from a Local Computer or Network

The CASEaDia search options allow a user to search for and add case documents stored in the CMS to a binder. A user can also search his or her local computer or computer network to add research or notes as instructed by the magistrate or judge.

- 1. Clicking **Create** on the Binders page will take the user to the Binder Details page. Additionally, clicking a link in the "Name" column of the Existing Binders table on the Binders page will route the user to the Binder Details page.
- 2. The top of the Binder Details page displays the binder information input when the binder was created. The binder identification information can be modified from the Binder Details page.
- 3. To change the name of the binder, type the correct name in the text box. When new data is entered in the field, it causes a **Save Changes** button to appear at the right end of the row of action buttons. Changes made to the binder identification fields must be saved before exiting this page.

Figure 101: Preparing to Populate Newly Created Binder

Binder De Name:	tails Name Changes	Magistrate DM F	armer	E	vent Date: (07/21/2016		
Judge:	David Farmer	•						
Owner: Updated By:	Administrator, Sy Administrator, Sy	rstem rstem		G Date	enerated: Updated:	2016-07-14	16:43:32.0	
Back	Generate	Add Docs	Add Header	Expand All	Collapse All	Save Chang	jes	
Тор	Sub	Description	L .	Filed On	link	Size	Filer	
Pack	Capacita	Add Doce	dd Hoador)			Save Chang	oc.]	
васк	Generate		do Header		Collapse All	Save Chang	es	

- 4. Click Save Changes. The page will refresh with the new data recorded.
- 5. To change the scheduled date, click in the "Event Date" text box and select a date from the Calendar pop-up or manually type in the new date. To save the new date, click **Save Changes**.
- 6. To change the judge or magistrate to whom the binder is assigned, use the "Prepared for" dropdown select the correct individual, and click **Save Changes**.

Figure 102: Headers Added to Newly Created Binder

Binder Det	ails						
Name:	Name: Name Changes Magistrate DM Farmer					07/21/201	6
Judge:	David Farmer	•					
Owner:	Administrator, Sy	/stem		Ge	nerated:		
Jpdated By:	Administrator, Sy	/stem		Date l	Jpdated:	2016-07-1	4 16:43:32.0
Back	Generate	Add Docs	Add Header	Expand All (Collapse All	Save Char	nges
Тор	Sub	Descri	otion	Filed On	link	Size	Filer
Back	Generate	Add Docs	Add Header	Expand All C	ollapse All	Save Char	nges

All documents added to a binder must be organized under a header. Headers can be added prior to adding documents or added while adding a document.

- 7. To add Headers in preparation for adding documents from a local machine or local network, click **Add Header** and type the header title in the textbox that appears.
- 8. Clicking **Add Header** caused the **Save Changes** button to appear. Click **Save Changes** prior to leaving the page to record any changes or additions.
- 9. To add documents to the binder, click the Add Docs button located just under the binder identification information. Clicking the Add Docs button will take the user to the Case and Document Search page, where the user has options to search either the CMS/DMS or a local computer for the appropriate documents to add to the binder.

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Figure 103: Case Document Search Options

Name: Name Changes Magistrate DM Farmer	Event Date: 2016-07-21
By: Administrator, System	Generated: Not Generated
QUERY FOR A SPECIFIC CASE	
Case Number Se	arch
OR	
INCLUDE ANY DOCUMENT	
INCLUDE ANY DOCUMENT Header Name	
INCLUDE ANY DOCUMENT Header Name	
Header Name INCLUDE ANY DOCUMENT Header Name New Header: Existing Header:	
Header Name INCLUDE ANY DOCUMENT Header Name Image: New Header: Legal Research Bookmark Name:	
INCLUDE ANY DOCUMENT Header Name New Header: Existing Header: Legal Research Bookmark Name: Document Location: Browse No file selected.	

10. To search for a document on your local computer or network, use the "Include Any Document" search option near the bottom of the page. This option may be useful when the clerk or judicial assistant wants to include a document, such as a ruling on a similar case that was accessed through a legal library or some other source outside the CMS.

Figure 104: Adding Documents from a Local Computer

Diriders - Dirider Details - Dirider Add Document	
Case and Document Search	
Name: Edwin Butrand	
Judge: David Farmer	
By: Administrator, System	Generated: Not Generated
QUERY FOR A SPECIFIC CASE	
Case Number Search	
OR	
INCLUDE ANY DOCUMENT	
Header Name	
New Header:	
Existing Header: Legal Research	~
Bookmark Name: Case Ruling	
Document Location: Browse Legal Research - Example Ruling 2.pdf	
Add	
Back	

- 11. To perform a local search, first determine whether the document will be added to an existing heading or added to a new heading. Select the appropriate radio button.
- 12. If "New" is selected, enter a new header name in the textbox provided. Also add a Bookmark Name to identify the document within the binder. The name of the document should help it to be both easily identifiable and communicate why it is included in the binder. For instance, "Example Ruling on..." would communicate the document purpose.
- 13. If an existing heading is selected, use the dropdown menu to choose the correct heading and add a Bookmark Name to identify the document within the binder.
- 14. Click on the **Browse** button at the bottom of the page. Navigate through your local or network computer directory until you can select the correct document.

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	Na	me: [dwin Butrand	Event Date: 01/01/2020
	Jud	ge:	David Farmer	
ase l	Numb Owr	oer: ner:	2016MSC00167 Administrator, System	Generated:
Upd	ated	By:	Administrator, System	Date Updated: 2016-07-15 12:39:57.0
E	Back		Generate Add Docs Add Header	r Expand All Collapse All Refresh Case Documents
	Тор	Sub	Description	Filed On link Size Filer
	1	-	Legal Research	
•••		1	Code of Law	07/15/2016 📄 122 Kb
×	-			

Figure 105: Binder Details after Documents Added

15. To add a document selected from your local computer to the binder, click the **Add** button at the bottom of the Case and Document Search page. You will be returned to the Binder Details page where the new document with additional information, including a link to the document, will be displayed under the selected or created heading.

Note: Although the documents are now listed on the Binder Details page in eFlex, they have not yet been added to the PDF generated binder. The user must activate one of the **Generate Binder** buttons to add the new headers and documents to the PDF binder.

Adding Case Documents: Single Case and Appellate Case Binders

1. To add case documents stored in the CMS, from the Binder Details page, click **Add Documents** to open the Binder Case Documents page.

Figure 106: Adding Documents from CMS

Case and Document Search	
Name: Name Changes Magistrate DM Farmer	Event Date: 2016-07-21
Judge: David Farmer	
By: Administrator, System	Generated: Not Generated
QUERY FOR A SPECIFIC CASE	
Case Number 2016MSC00167	Search
OR	
INCLUDE ANY DOCUMENT	
Header Name	
New Header:	
Existing Header: Legal Research	· ·
Bookmark Name:	
Document Location: Browse No file selected.	
bbA	
Back	
Binder Case Documents	
Name: Name Changes Magistrate DM Farmer	Event Date: 07/21/2016
Judge: David Farmer	
by: Administrator, System	Generated:
THE CIVIL CASE OF EDWIN BUTRAND : Case 20	016MSC00167
Header Name	
New Header: THE CIVIL CASE OF EDWIN	BUTRAND : Case 2016M
Select Header: Legal Research	•
Back Add Documents	
Date Filed	Document
07-11-2016 NOTICE OF HEARING ON CHANGE OF	NAME
07-11-2016 APPLICATION CHANGE OF NAME - ADI	JLT; ENTRY SETTING HEARING; INDEX AND DOCKETING
Back Add Documents	

2. For either a Single Case Binder or for an Appellate Case Binder, the Case Number information is already known so the user will not enter the number on the Binder Case Documents page. If the

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binder was newly generated, or for a Single Case Binder is set to auto update, the last entry on the Binder Case Documents page will indicate "All documents are already in the binder."

- 3. For either an existing Single Case Binder that does not have auto update configuration or for an Appellate Case Binder, the final entry on the Binder Case Documents page will be a listing of any documents that have been accepted and added to the case history since the last time the generated binder pdf or the eFlex binder list was manually updated.
- 4. To add new case documents to the existing binder, select the documents to be added by clicking in the checkbox to the left of each listing to be included. The user may select the column heading checkbox if all the listed documents are to be added to the binder.
- Click Add Documents to save the documents to the binder list and to be returned to the Binder Details page.
- 6. For a Single Case Binder, the headings and documents will be listed in reverse chronological order, with the most recent document filed or most recent header addition being listed first.
- 7. For an Appellate Case Binder, the headings and documents will be listed in chronological order, with the first document filed on the case appearing at the top of the listing.

Note: Although the documents are now listed on the Binder Details page in eFlex, they have not yet been added to the PDF generated binder. The user must activate one of the **Generate Binder** buttons to add the new documents to the PDF binder.

Adding Case Documents: Multi-Case Binders

- 1. To add case documents stored in the CMS, from the Binder Details page, click **Add Documents** to open the Case and Document Search page.
- 2. To search the CMS for document, in the "Query for a Specific Case" section, enter the Case Number in the textbox provided, and click **Search**.
- 3. The Binder Case Documents page will open and a list of all the documents that associated with the identified case will display under a header based on the case number. The documents in this list are all associated with filings recorded in the CMS.

Figure 107: Selecting and Adding Documents to the Binder

Binder	Case Documents	
Name: N	Name Changes Magistrate DM Farmer	Event Date: 07/21/2016
Judge: [by: /	David Farmer Administrator, System	Generated:
THE CIVII	CASE OF EDWIN BUTRAND : Case 2016MS	SC00167
Header N	ame	
New	Header: THE CIVIL CASE OF EDWIN BUTR	AND : Case 2016M
Select	Header: Legal Research	•
Back	Add Documents	
V Date	e Filed Doo	cument
07-11-	2016 NOTICE OF HEARING ON CHANGE OF NAME	
07-11	2016 APPLICATION CHANGE OF NAME - ADULT; EN	ITRY SETTING HEARING; INDEX AND DOCKETING
Back	Add Documents	

- 4. Click in the check box to the left of each document to be included in the binder. To select all the documents listed, click the checkbox in the table header.
- 5. Click **Add Documents** to add all selected documents to the binder and be returned to the Binder Details page where the new header and the associated documents are listed. The headings and documents are listed in a reverse chronological order.



1	Name	e: Na	me Changes Magistrate	DM Farmer Event Date: 07/21/2016	
-	ludae	e: [David Farmer 🔻		
0	wne	r: Ad	ministrator. System	Generated:	
pdat	ed By	/: Ad	ministrator, System	Date Updated: 2016-07-15 12:	47:09
D	ack		Generate Add Docs		
	dCK				
	Тор	Sub		Description Filed On link Si	ze File
X	1	-	THE CIVIL CASE O)F EDWIN BUTRAND : Case 2016MSC00:	
×	-	1	NOTICE OF	EARING ON CHANGE OF NAME 07/11/2016	٢b
×	-	2	APPLICATIO	N CHANGE OF NAME - ADULT; ENTRY SE 07/11/2016 📔 01	٢b
×	2	-	THE CIVIL CASE	OF LACEE LASSITER : Case 2016MSC001	
×	-	1	NOTICE OF	EARING ON CHANGE OF NAME 07/11/2016	٢b
×	-	2	APPLICATIO	N CHANGE OF NAME - ADULT; ENTRY SE 07/11/2016 📔 01	٢b
×	3	-	THE CIVIL CASE	OF SHANNON SORENSON : Case 2016MS	
×	-	1	NOTICE OF	EARING ON CHANGE OF NAME 07/11/2016	٢b
×	-	2	APPLICATIO	N CHANGE OF NAME - ADULT; ENTRY SE 07/11/2016 📔 01	٢b
×	4	-	THE CIVIL CASE	OF VICKY MILLER : Case 2016MSC00170	
×	-	1	NOTICE OF	EARING ON CHANGE OF NAME 07/11/2016	٢b
×	-	2	APPLICATIO	N CHANGE OF NAME - ADULT; ENTRY SE 07/11/2016 📔 0 9	٢b

6. If the user wishes to add more documents or another case to this binder, click the Add Docs button again and repeat the steps above. At this stage, the binder is essentially a draft. This feature of CASEaDia allows the user to complete work on the binder at another time or allows a different user with access privileges to add to the binder prior to its finalization. The binder and its contents can be accessed through selecting the CASEaDia > List Binders option on the menu bar at the top of any page in the Court Review Interface.

Generating a Binder PDF

- To move the binder from the draft stage to a single document PDF with bookmarks, click on the Generate button located at the top of the Binder Details page.
- 2. The user may also create the PDF binder from the initial Binders page. To do so, click in the check box to the left of the binder(s) you wish to move from draft stage into a PDF. Next, click

the **Generate Binder** button located at the bottom of the page. CASEaDia builds the PDF and automatically creates a title page with bookmarks for each case and each document listed.

Figure 109:	Generating a	ı Binder from	the Multi-Case	Binders Page
-------------	--------------	---------------	----------------	---------------------

	GUMERT COUNTY PROBAT							
lew binder:								
Single	Multi 🔘 Appellate							
Name: *								
Case Number:	:							
Event Date:								
Prepared for:	*							
. oparoa . or .								
Auto Update:								
Auto Update:								
Auto Update: Create								
Auto Update: Create								
Auto Update: Create								
Auto Update: Create xisting bind	ders:							
Auto Update: Create xisting bine Filter by All	ders:	efresh						
Auto Update: Create xisting bine Filter by All	ders:	efresh)						
Auto Update: Create xisting bind Filter by All Delete Binder	ders:	efresh)				Entries per p	page: 50) •
Create Create xisting bine Filter by All Delete Binder View Bine	ders:	efresh)	pe <u>Judge</u>	Generated Date	Auto Update	Entries per p	Dage: 50 Gen. Day) 🔻
Create Create xisting bine Filter by All Delete Binder View Bine	ders:	efresh	<u>pe</u> ▲ <u>Judqe</u> gle Catharine Kido	<u>Generated Date</u> 1 06/23/2016 09:16	Auto Update	Entries per p	bage: 50 <u>Gen. Day</u>) 🔻
Auto Update: Create xisting bind Filter by All Delete Binder View Bind Delete Binder	ders: Generate Binder er Name 2016MSC00141 Name Changes CDK	efresh	pe ▲ Judge gle Catharine Kidg ti Catharine Kidg	<u>Generated Date</u> 1 06/23/2016 09:14 1 06/23/2016 09:14	Auto Update	Entries per p Up To Date	bage: 50 Gen. Day) V Change Gen.
Auto Update: Create xisting bind Filter by All Delete Binder View Bind View Bind View Compared to the binder	ders: Generate Binder 2016MSC00141 Name Changes CDK Edwin Butrand	efresh	De ▲ Judge gle Catharine Kido Iti Catharine Kido gle David Farmer	<u>Generated Date</u> d 06/23/2016 09:16 d 06/23/2016 09:14	Auto Update	Entries per p Up To Date Yes	Dage: 50 Gen. Day Daily) V Change Gen.

3. Both the **Generate** and the **Generate Binder** buttons also act as an Update command in case additional documents need to be added to an already existing binder.

Viewing and Modifying Binders

The order in which headings are displayed in the binder can be altered. The user can also change the order in which the documents are listed as well. Additionally, entries can be deleted. These changes can be made when the binder is in the "Created" or build state and can also be made after the binder is generated. However, if additions or changes are made after a binder is generated and the binder has been downloaded to a local machine, the user will need to open and save the new copy of the generated binder in order to view the changes.

- 1. To view or modify a binder, select the **Binders>List Binders** option on the upper menu bar. The Binders page will appear and a list of binders currently on the system will display. The default is 'All' binders.
- 2. To expedite searching for a particular binder, the user can use the Filter By drop-down list at the top of the page to filter by the judge associated with the binder.

Figure 110: Filtering List of Cases to View

ter by All	-	Refresh							
elete B Alice Arvin Cath	McCollum Miller arine Kidd	J					Entries per p	bage: 50) 🔻
View David	d Farmer	ame	<u>Type</u>	▲ <u>Judge</u>	Generated Date	Auto Update	Up To Date	Gen. Day	Change Gen. Da
🛾 📄 🛛 David	d White		Single	Catharine Kidd	06/23/2016 09:16				
] 📄 Josep	oh Gallagher	<u>DK</u>	Multi	Catharine Kidd	06/23/2016 09:14				
]	Edwin Butrand		Single	David Farmer		V	Yes	Daily	•
1	Name Changes M	Aggietrate DM Earmer	Multi	David Farmer					

3. Additionally, the user can sort the visible list by clicking on any underlined column heading.

Figure	<i>111:</i>	Sorting	List
--------	-------------	---------	------

Delete Binder Generate Binder						Entries per page: 50 🔻					
View Binder	Name	<u>Type</u>	▲ <u>Judge</u>	<u>Generated Date</u>	Auto Update	Up To Date	<u>Gen. Day</u>	Change Gen. Day			
	2016MSC00141	Single	Catharine Kidd	06/23/2016 09:16							
	Name Changes CDK	Multi	Catharine Kidd	06/23/2016 09:14							
	Edwin Butrand	Single	David Farmer		\checkmark	Yes	Daily	-			
	Name Changes Magistrate DM Farmer	Multi	David Farmer								

4. The Generated Date column informs the user whether the binder is in the draft stage or whether a single document, bookmarked PDF has been created. If no date appears in this column, the binder is still in the draft stage.

- A binder that has been generated will have a Document icon directly to the left of the Name column. Clicking the Document icon will cause the binder PDF to download to your local machine.
- 6. Any listing under the Name column acts as a link to the Binder Details page. From the Binder Details page, the user can view individual documents, add documents (including adding additional cases to a Multi-Case Binder), delete documents, or generate the binder PDF.

Figure 112: Modifying Binders from the Binder Details Page

Binder Det	ails	
Name	Edwin Butrand	Event Date: 01/01/2020
Judge: Case Number:	David Farmer 2016MSC00167	
Owner	Administrator, System	Generated:
Updated By:	Administrator, System	Date Updated: 2016-07-15 12:39:57.0
Back	Generate Add Docs Add Header Expa	nd All Collapse All Refresh Case Documents
Top Su	Description	Filed On link Size Filer
□×1 -	Legal Research	
X - 1	Code of Law	07/15/2016 📔 22 Kb
X - 2	Case Ruling	07/15/2016 📄 116 Kb
Back	Generate Add Docs Add Header Expan	nd All Collapse All Refresh Case Documents

- 7. On the Binder Details page, to view a particular document, click the Document icon in the Link column to the right of that document. A secondary page will display the selected document.
- 8. To add a document, click the **Add Docs** button and follow the Adding Documents to a Binder procedure in the Binder Creation section of this manual.
- 9. To add a case or research category that will contain documents from a local machine, click the Add Header button. The header is the case name that will appear as the PDF bookmark. When a case or research category is added, the system automatically assigns it a place within the binder and a corresponding numerical value is listed in the Top column. There are no documents linked to a header. It is simply the organizational tool under which all the case documents are grouped.
- 10. To delete a document or a case, click the red "X" listed to the left of the case or document you wish to delete.

Note: Any documents deleted from a Single Case Binder that is configured to auto-update will be automatically added back into the binder the next time the system updates the binder. To prevent a

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deleted document from repopulating in the Single Case Binder, de-select the Auto Update checkbox listed to the left of the binder on the initial Binders page.

11. To change the order in which the headers are displayed, click into the "Top" textbox to the left of the header entry that needs to be moved.



Figure 113: Changing Organization within the Binder

- 12. Type a numerical place value for the desired position within the list of headers. The number must be within the range displayed.
- 13. Click anywhere on the page outside of the textbox just changed. The page refreshes with the header and its associated documents moved into the desired position and the other headers automatically renumbered.

Figure 114: View of Reorganized Binder



- 14. To change the order in which documents are displayed, click in the "Sub" textbox to the left of the document to be moved.
- 15. Type in the desired position numerical value and click outside the textbox.
- 16. To delete an entry, click on the red "X."
- 17. After any changes have been made using the features on the Binder Details page, click the **Generate** button located either at the top or bottom of the page to update the binder PDF.

Deleting a Binder

1. To delete a binder, select the **Binders>List Binders** option from the upper menu bar. The Multi-Case Binders page will appear and display by default all current binders.

2. To expedite searching for a particular binder, the user can use the Filter By drop-down list at the top of the page to filter by the judge associated with the binder.

Note: Binders are automatically deleted after a configurable period of time following the Event Date. The default time period is 90 days.



Figure 115: Deleting Binders from the Multi-Case Binders Page

- 3. After finding the binder you would like to delete, click in the check box to the left of the binder name.
- 4. To delete the selected binder(s), click the **Delete Binder** button located at the bottom of the Binder Details page.

Working with Generated Binders

Judges or other users wanting to access already generated binders must first login to the Court Review Interface.

1. Select the Binders>List Binders from the upper menu bar.

Figure 116: Downloading a Binder to a Local Computer

iter by All	▼ Refresh							
Delete Binder)	Generate Binder To	down	load the	generated Bi	nder.	Entries per p	bage: 5	0 🔻
View Binder	Name	Type	▲ <u>Judge</u>	Generated Date	Auto Update	Up To Date	Gen. Day	Change Gen. Da
	2016MSC00141	Single	Catharine Kidd	06/23/2016 09:16				
	Name Changes CDK	Multi	Catharine Kidd	06/23/2016 09:14				
	Edwin Butrand	Single	David Farmer		V	Yes	Daily	•
-	Name Changes Magistrate DM Farme	r Multi	David Farmer	07/15/2016 14:06				

- The Binders page will appear. To download the binder PDF to a local computer, click on the Document icon pictured to the immediate left of the Name of the selected binder. Depending on your browser configuration, a dialog box will appear asking whether or not you want to download the Adobe Acrobat PDF file to your machine. Click **OK**.
- 3. If the web browser is configured to open the PDF in another tab, wait until the PDF opens. Depending on the particular browser used, at the bottom of the PDF page, a tool bar will display. Other browsers may have the toolbar at the top of the display. Click the "Save" icon (which looks like a Floppy Disc) or the "Download" icon (which is a vertical rectangle with a downward pointing arrow inside it). On the dialog box that opens, name the file and select the location in which to save it. Click **Save**. Exit the web browser, locate the saved file on your computer, and open it.
- 4. Access to the PDF binder file is through your local computer and not through the Court Review Interface.

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Figure 117: Viewing Cases and Documents within the Binder

- 5. Locate the downloaded binder document on your local computer and open it. At the upper left of the screen, you will see a Bookmark icon. If you are unsure of which icon is the bookmark icon, roll your mouse over the icons to view their identification bubbles.
- 6. Click on the Bookmark icon to open a sidebar to the left of the main document. The cases will be listed by name. A small "+" will display to the left of each case name in this side bar.
- 7. Clicking on the "+" will display a list below the case name and slightly indented. This list is all the documents that are included in this binder associated with the selected case.
- 8. A Bookmark icon, slightly smaller than the one used to open the sidebar, is located to the immediate left of each case and each document listed. Click on this Bookmark icon to navigate to the selected document image within the PDF.