Tennessee Courts eFiling

eFiling

powered by eFlex from Tybera

Tybera

Integrated court technology

eFlex Electronic Filing – Court Review

User Guide for Clerks

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eFlex Electronic Filing – Court Review

INTRODUCTION

EFlex consists of two modules – the Filer Interface and the Court Interface (also called Court Review).

FILER INTERFACE:

- Accessed by a simple internet browser, eFlex allows a filer to initiate case and send complex follow-up documents that modify case data such as third-party complaints, cross complaints, counter complaints, and others.
- Filers can request a new account, enter their contact information, and designate multiple email accounts where courtesy notifications can be sent. Filers are also able to pay court filing fees securely as well as request payment waivers, deferrals, and other fee changes.

COURT INTERFACE:

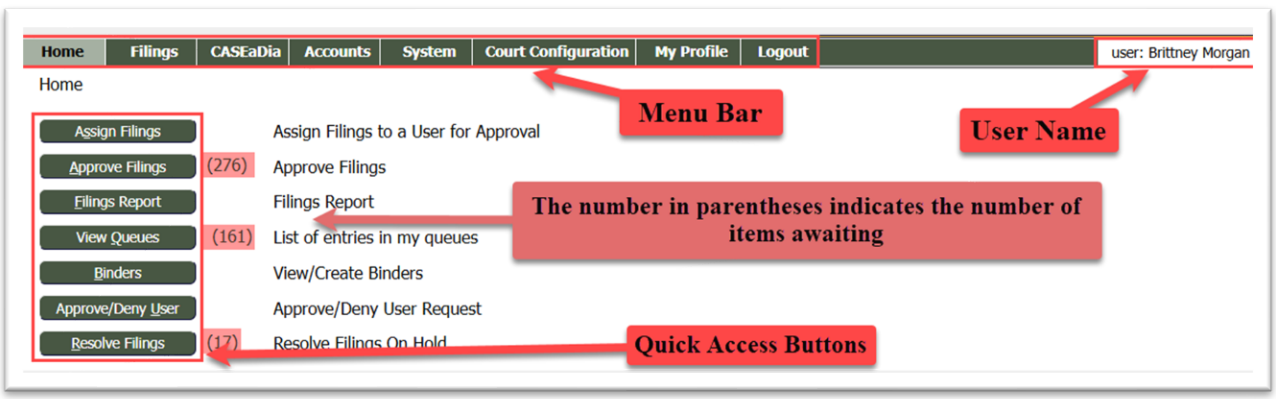
- Court Review allows the clerk to receive, date, and time stamp documents.
- Clerks can review and approve or reject submissions as well as modify the data submitted.
- The Interface consists of many types of workflow queues that assist the clerk in keeping submissions electronic as they travel from person to person seeking acceptance.
- eFlex can be configured to automatically assign submissions to clerks based on certain criteria.
- Submissions can be reassigned to judges for special approval when fee waivers are requested. Once the clerk approves or even partially approves the submission, eFlex collects filing fees and then stores the documents in the court's Case Management System (CMS), after which a receipt is sent to the filer.

NAVIGATING THE HOME PAGE

The **Home** page of Court Review is the first screen upon login. The appearance of the home page varies depending on which role is logged into the system. Each role has designated responsibilities and system permissions. For this reason, the **Home** buttons displayed, the tabs in the Menu Bar and even the selections in the drop-down menu lists may differ between court personnel.

The quick access links provided by the Home Buttons will take the user to the screens most often visited by their role. These pages may also be reached by hovering over the appropriate Tab and selecting from its drop-down menu. Conveniently, the menu bar is located at the top of every screen in Court Review so that the user need not return to the **Home** page to click the Buttons.

Please note that within this guide there may be screens and instructions that are not pertinent to your responsibilities. As one becomes familiar with the buttons, tabs, and pages, and how to navigate where you need to go to perform certain tasks, it will become easier to establish your routines in the electronic world of eFiling.



- All the basic Court Review functions for each role are accessed by clicking the appropriate Quick Access buttons on the **Home** page.
- Any number in parentheses next to a quick access button indicates the number of entries needing attention.
- The user may also navigate the page using the menu bar, located across the top of every page. Hover over the tab and a drop-down menu will appear.
- The user's first and last name appears on the right side just below the banner. This is based on the user's profile information.
- To log out and terminate the current session to the 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 if 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

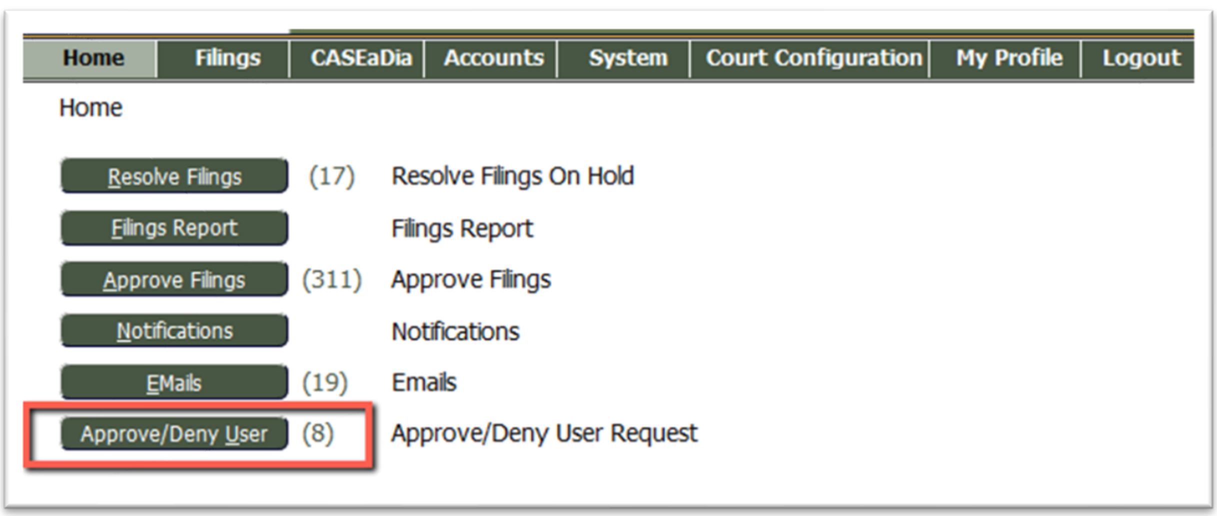
Approve/Reject/Reassign. Typing in a text field on a web page or changing the document type on the **Approve Filing** page does not count as being "active."

- When the system logs the user out, the screen does not 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 since 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 one filing could be affecting another.

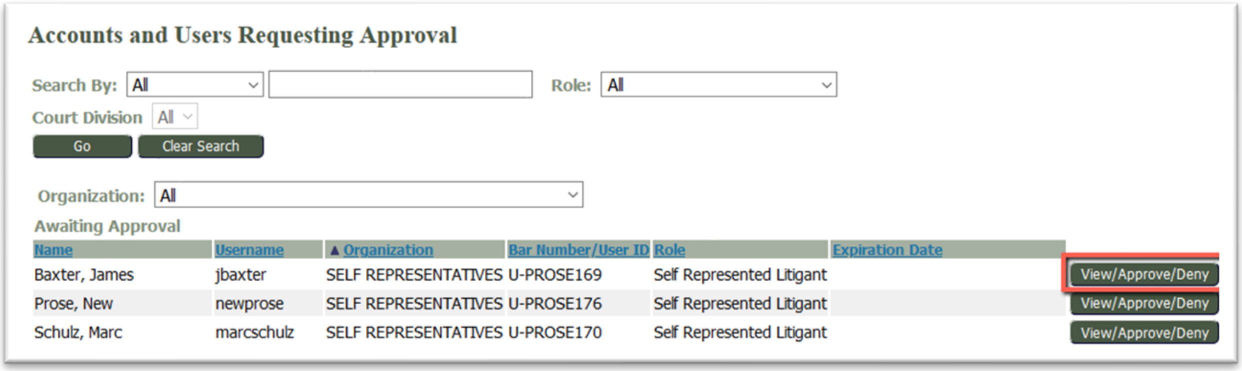
APPROVING ACCOUNT REQUESTS

Tybera supports Tennessee TnCIS courts and reviews all submitted account requests internally. Court clerks will not be required to approve filer account requests. This section remains in the clerk guide to answer questions about how the review process works. Only court administrators will have access to the **Approve/Deny User** page.

1. On the **Home page** of **eFiling Court Review**, click the **Approve/Deny User** button. (The number in the parentheses indicates the number of requests awaiting approval).

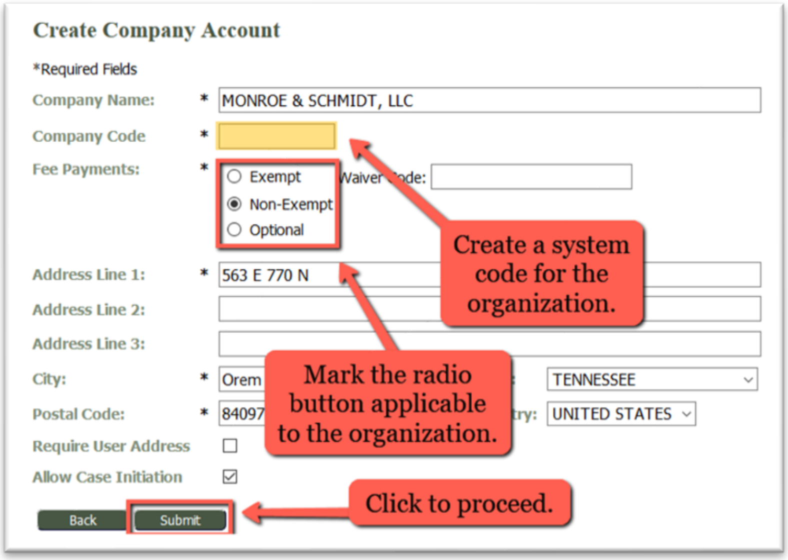


2. On the **Accounts and Users Requesting Approval** page, click the **View/Approve/Deny** button on the line of the person requesting an account. This will bring up the **User Profile** page.



3. Review the information on the **User Profile** page. If the applicant marked the radio button **New organization** in their account request, a **Create Organization** button will display. Click this button.

4. Create a **CODE** for the organization. Mark the applicable radio button regarding the payment of fees. Review address information. Click the **Submit** button to proceed.



5. If the applicant selected the radio button **Existing Company**, the "User Profile" will display the button **Reassign User to New Company**. If applicable, click the button and select another organization in the drop-down. Click save.

6. When ready to approve the account request, type or copy/paste a welcome message into the message area and click the **Approve** button.

7. If rejecting the request, enter a reason why the account cannot be approved and click the **Deny** button.

BUTTONS ON THE HOME PAGE

Note: The display of buttons and tabs will vary per user's role. Not all are pertinent to each user's responsibilities.

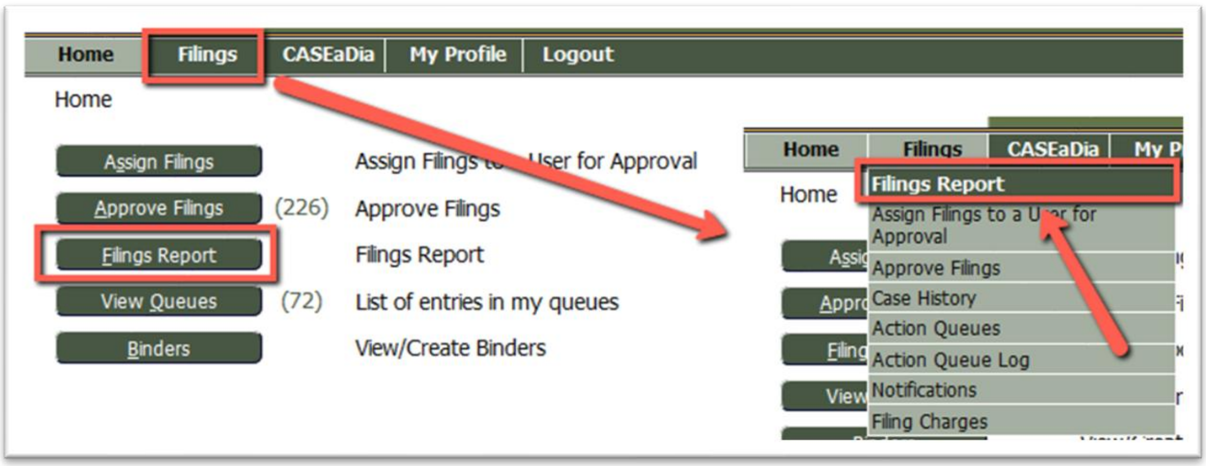
All filings received by the court - both external filings (from eFilers) and internal filings (initiated by the court) are listed and stored in this report system.

NAVIGATING THE FILINGS REPORT PAGE

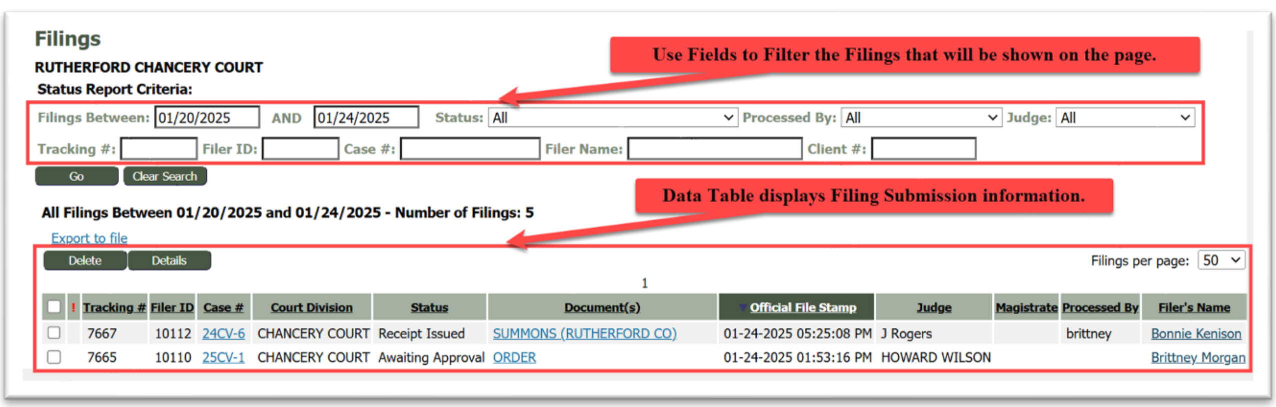
All filings received by the court - both external filings (from eFilers) and internal filings (initiated by the court) are listed and stored in this report system.

SUMMARY OF THE FILINGS REPORT PAGE

- The **Filings Report** page is accessed by clicking the **Filings Report** button on the **Home** page.
- The **Filings Report** page may also be accessed by hovering over the **Filings** tab and selecting **Filings Report** from the drop-down menu.



The page is divided into two sections: The filtering fields are the top of the page, and the filings data table at the bottom of the page. The data displayed in the report can be controlled by the user when they set the filter fields or when they use the ascending/descending sort feature of the column headers. Clicking the header of choice causes the data to sort alphabetically or numerically. Clicking a second time reverses the action.



Section #1 - FILTERING FIELDS

When searching for a specific submission or group of submissions, use the various filters at the top of the page individually or in conjunction with each other to locate what you are needing. Click **Go** to initiate a search based on the filter criteria entered. Click the **Clear Search** button when you have completed your search.

a. **Filings Between fields** -
   - The default date in the first date field is today's date. If the second date field is blank, its default date is also 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.
   - If a past date is set in the first date field and the **Clear Search** button is not clicked before leaving the page, when you return to the page in the same time session, the former set date will still be in place. If you logout or the session terminates because of inactivity, when you log back in, the setting will refresh and today's default date will show again.

b. **Status** – Select a status from the drop-down menu if this is relevant to your search.

c. **Processed By** – Select from the drop-down list of court personnel who would have processed the filing - if this has meaning to your search.

d. **Judge** – Select from the drop-down list of available judges who would have processed the filing - if this has meaning to your search.

e. **Tracking # -** Entering the **Tracking #** in the provided field will gray out all other filter fields and make them unavailable for entering in any data. This is because the number specifically identifies the filing you are looking for. All number fields behave in this way.

f. **Filer ID** – Entering the **Filer ID #** in the provided field will gray out all other filter fields because it is a number field, as discussed above.

g. **Case # -** Entering the **Case #** in the provided field will gray out all other filter fields because it is a number field.

h. **Court Division** – Select from the drop-down list as applicable. The default is set as **All**.

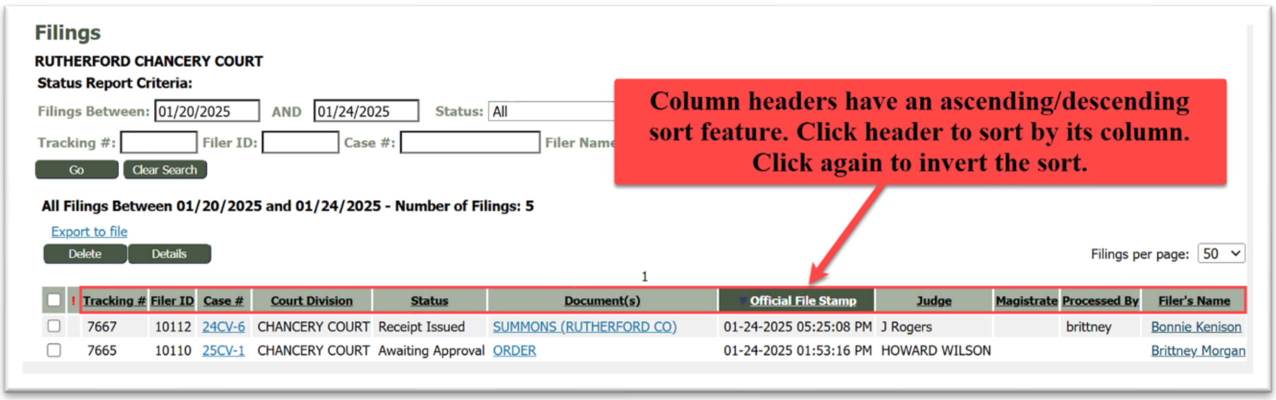
i. **Filer name** – Select from the drop-down list as applicable. The default is set as **All**.

j. **Client # -** This field corresponds to the data retrieved from the optional **Client #** field offered in the Filer Interface on the **Review and Submit** page. It has no bearing on the case or on the eFiling system. It is provided simply as a convenience field for filers with an internal filing/record system.

Section #2 - FILINGS DATA TABLE

Column headers in the data table have an ascending/descending sort feature that sorts alphabetically or numerically. Click the column header of choice to cause the table display to be organized according to the header selected. Clicking the column header a second time reverses the order of the displayed information.

The default column for the data table is the **Official File Stamp** column, which means the most recent filings will be at the top. This is recognized by the block color difference of the column header that is controlling the data display. If another column is selected for filtering, this will become the new default setting for the session. If you leave the page and return in the same time session, it will stay as the default setting. However, if you logout or the session terminates because of inactivity, when you log back in, the setting will refresh and the **Official File Stamp** column will once again resume as the default column header.



a. **Tracking #** - This is a unique tracking number assigned to each filing in Court Review, whether it be a submission from an external source (submitted by a filer through the Filer Interface) or an internal source (submitted by a judge originating in a Judicial Queue).
b. **Filer ID** – This is a unique ID number given to the submission by the Filer Interface.
c. **Case #** - This is the number assigned to the case by the CMS (Case Management System). If there is no case number listed in the column, the filing is a case initiation.
d. **Court Division** – This field displays the court division to which the filing was sent.
e. **Status** – This is the most current status assigned to the filing. If the filing is in process, this may continue to change as the user refreshes the page (clicking the **Go** button refreshes the page). The following list identifies the statuses that a filer might see in the Filer Interface. The clerk will need to understand them to respond to a filer's question, should they call.
    - **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 filing has been approved. This Is the final status.
    - **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-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 statuses that a clerk might see in the Court Interface on the **Filings Report** page.

- **Approved** - The submission is approved and leaving the Court Review Queue.
- **Awaiting Approval** – Awaiting approval from the clerk.
- **CMS Committed Requested** – To be determined by the 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 the CMS.
- **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** – This is the final status for a filing. The Confirmation of Receipt is sent to the filer.
- **Received** – Submission has been received by the court.
- **Rejected** – Problem with the filing that was submitted to the court.
- **CMS Revalidated** – A technical state in which eFlex is communicating with the CMS.
- **Stored** – Information about the filing is being prepared for clerk review but not yet sent.

A clerk does not need to know all these status conditions to complete their daily tasks. Most of the time a filing will quickly move through the list of statuses, so 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 encounters an error condition, the filing goes "on hold." 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**.

f. **Document(s)** – The document type listed may represent a single document submission or a multiple document submission. Clicking its hyperlink title will direct the user to the **Filing Details** page where the user can see the details of the filing, including opening and viewing all the documents.

g. **Official File Stamp** – This is the date/time recorded when the submission was received by the **Court Review Interface** and not when the clerk approves the submission.

h. **Judge** – The judge's name will be listed for filings to existing cases. As this is a non-integrated eFiling solution, the judge field remain empty. If it is a case initiation, this line will be blank because the judge has yet to be assigned to the case.

i. **Magistrate** – This lists the Magistrate assigned to the case.

j. **Processed By** – This lists the username of the person who approved the filing.

k. **Filer's Name** – This is the name of the filer who sent in the submission.

k. **Client #** - A number may or may not be listed in this column. This number is retrieved from the optional **Client #** field offered in the Filer Interface on the **Review and Submit** page. It has no bearing on the case or on the eFiling system. It is provided simply as a convenience field for filers with an internal filing/record system.

BUTTONS ON THE FILINGS REPORT PAGE

The GO button – This button initiates a search to locate a submission or group of submissions after the user sets filtering criteria. It can also be used to refresh the page to see the current progress of a filing as it goes through the different stages of processing.

The Clear Search button – This button clears all fields of any set filters.

The Delete button - This button corresponds with the checkboxes in the left column next to each listed filing. By marking one or more checkboxes, a user may permanently delete the filing from view. This button is only available to the Administrator.

The Details button - This button corresponds with the checkboxes in the left column next to each listed filing. By marking the checkbox of a single filing and clicking the **Details** button, the user will be directed to the **Filing** page to glean more information about the filing (see the section below entitled **Filing** page).

ADDITIONAL PAGES ACCESSED THROUGH THE FILINGS REPORT PAGE

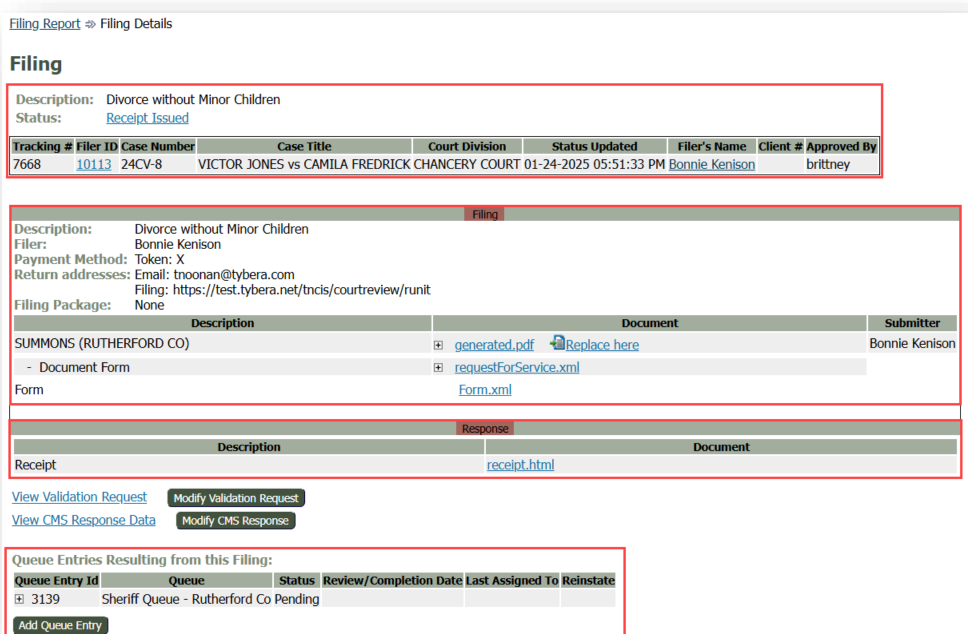
Click the **Document** Title hyperlink to be directed to the **Filing Details** page. Alternately, a user may also access this page by marking the checkbox to the left of the filing and clicking the **Details** button (see #2 below).

1 - FILING DETAILS PAGE

This page provides specifics regarding the individual filing. It is accessed by clicking the hyperlink document type in the **Document** column on the **Filing Reports** page or by marking the **checkbox** to the left of the filing and clicking the **Details** button.

The **Filing Details** page is divided into four sections:

1) The **Filing Info** section which lists the tracking #, Filer ID, Case #, Case Title, Court Location, Date & time when status was updated, Filer's Name, Client # (if provided by the filer), and which individual approved the filing;
2) The **Filing** section which lists the hyperlink documents submitted in the filing;
3) The **Response** section which lists how the court responded. The hyperlink **receipt.html** will display if the status of filing as **Receipt Issued**.
4) The **Queues** section, which lists queue entries resulting from the filing and what the status is of the queue entries (not all filings are sent to a queue. This section is shown only if applicable to the filing).



ADDITIONAL PAGES ACCESSED THROUGH THE FILING DETAILS PAGE

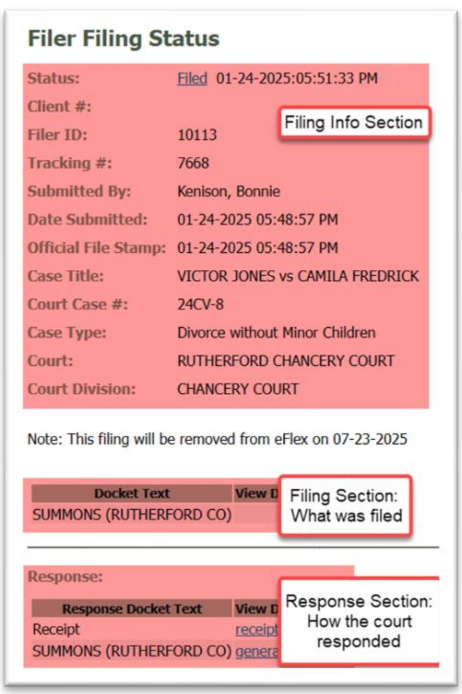
1. Click the hyperlinked **Filer ID number** to be directed to the **Filer Filing Status** page.
2. Click the hyperlinked Document titles of each document in the filing to view the document.
3. Click the hyperlinked **receipt.html** in the **Response** section to view the **Confirmation of Receipt**.

1 - FILER FILING STATUS PAGE

This page, accessed by clicking the **Filer ID #** on the **Filing Details** page, allows the court user to see what the filer sees on their **Filing Status** page in the **Filer Interface**. The filer accesses this page by clicking the **My Filings** button on their **Home** page of the Filer Interface, then clicking the hyperlink status listing inside the data table.

The **Filer Filing Status** page is divided into three sections:

1) The **Filing Info** section which lists the **Time Filed**, **Client #** (if provided by the filer), **Filer ID #, Tracking ID, Filer Name, Date Submitted, Official File Stamp of The Court, Case title, Court Case #, Case Type,** and **Court Division**.
2) The **Filing** section which lists the hyperlink documents submitted in the filing.
3) The **Response** section which lists how the court responded. The hyperlink **receipt.html** will display if the status of filing is **Receipt Issued**. If this section does not display, the filing has yet to be approved.



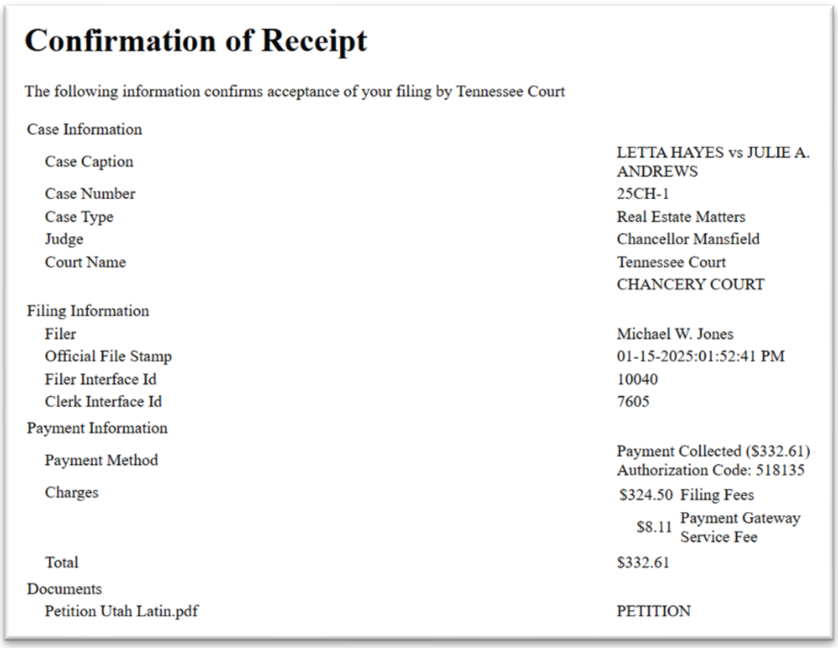
2 – DOCUMENT TITLES

Clicking the hyperlink of each document listed in the **View Document** column will open the document and allow the user to see what was submitted in the filing.

3 - CONFIRMATION OF RECEIPT

This page, accessed by clicking the hyperlink **receipt.html** in the **Response** section of the **Filing Details** page, is the receipt to the filer that their filing was accepted by the Court. It is displayed in a newly opened browser tab. Close the tab to close the page.

- The status of the filing will be **Receipt Issued**.
- It displays the case information, the filing information, the payment information, and the titles of the document(s) filed.
- This document is also received by the filer who may access it when they login to the Filer Interface by clicking the **My Filings** button, clicking the hyperlink status listing in the data table, and clicking the **receipt.html** on the **Filing Status** page.



Confirmation of Receipt

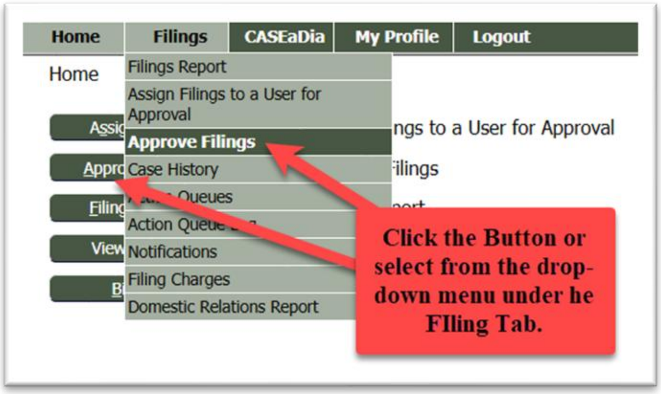
The following information confirms acceptance of your filing by Tennessee Court

Case Information	
Case Caption	LETTA HAYES vs JULIE A. ANDREWS
Case Number	25CH-1
Case Type	Real Estate Matters
Judge	Chancellor Mansfield
Court Name	Tennessee Court CHANCERY COURT
Filing Information	
Filer	Michael W. Jones
Official File Stamp	01-15-2025:01:52:41 PM
Filer Interface Id	10040
Clerk Interface Id	7605
Payment Information	
Payment Method	Payment Collected ($332.61) Authorization Code: 518135
Charges	$324.50 Filing Fees $8.11 Payment Gateway Service Fee
Total	$332.61
Documents	
Petition Utah Latin.pdf	PETITION

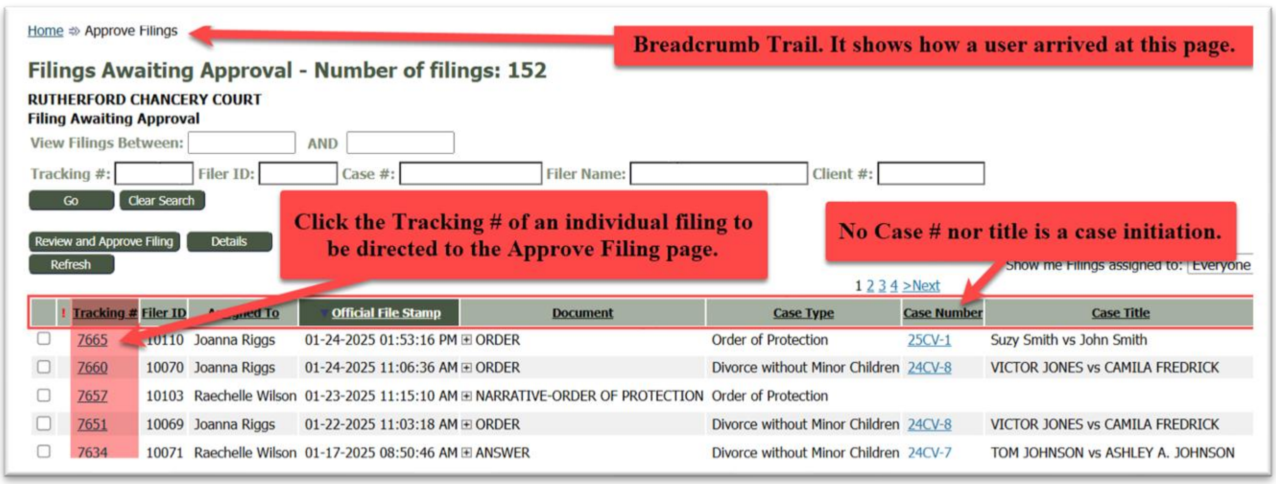
SUMMARY OF THE FILINGS AWAITING APPROVAL PAGE

All filings received by the court – both external filings (from eFilers) and internal filings (initiated by the court) need to be approved to be recorded in the CMS (case management system).

- The **Filings Awaiting Approval** page is accessed by clicking the **Approve Filings** button on the **Home** page.
- The **Filings Awaiting Approval** page may also be accessed by hovering over the **Filings** tab and selecting **Approve Filings** from the drop-down menu.



- Courts may opt to configure certain document types to be auto-approved.
- The number in parentheses next to the **Approve Filings** button on the **Home** page displays the number of filings awaiting approval.



The breadcrumb trail is in the top left corner of the screen. Is shows how a user arrived at the current page. Clicking the hyperlink name of any former page will take the user to that page.

- **Column** headers in the data table have an ascending/descending sort feature that sorts alphabetically or numerically. Click the column header of choice to cause the table display to be organized according to the header selected. Clicking the column header a second time reverses the order of the displayed information.
- To select a filing for approval, click its hyperlink tracking # inside the **Tracking #** column. Alternately, mark the checkbox of the filing to be approved and click the **Review and Approve Filing** button. This will direct the user to the **Approve Filing** page.
- Clicking the **Details** button after marking a checkbox will direct the user to the **Filing Details** page (see pg 13).
- Submissions filed to an existing case show the case # in the **Case Number** column. A blank field indicates a new case, which receives a case # after it has been approved.
- Clicking the hyperlink case number directs the user to the **Case History** page.

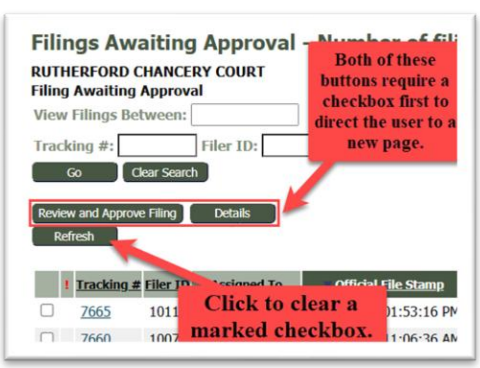
- The default column for the data table is the **Official File Stamp** column, which means the most recent filings will be at the top. This is recognized by the block color difference of the column header that is controlling the data display. If another column is selected for filtering, this will become the new default setting for the session. If you leave the page and return in the same time session, it will stay as the default setting. However, if you logout or the session terminates because of inactivity, when you log back in, the setting will refresh and the **Official File Stamp** column will once again resume as the default column header.
- Clicking the **+** sign next to the **Document Title** inside the **Document column** will expand this section and show what documents are associated to the filing. It also provides a hyperlink, allowing the user to view the documents. Clicking the **–** sign will collapse this section.
- On the right side of the page, just above the list of filings, there is the option to use the drop-down menu on the **Show me Filings Assigned to** field to filter the submissions displayed on the page to All submissions (everyone), unassigned submissions (No one), or submissions currently assigned to a specific user.

BUTTONS ON THE APPROVE FILINGS PAGE

The Review and Approve Filing button **–** It is necessary to mark a checkbox of a listed filing first to click this button and be directed to the **Approve Filing** page. Alternately, a user is also directed to this page by clicking the hyperlinked tracking # inside the **Tracking #** column.

The Details button – It is necessary to mark a checkbox of a listed filing first to click this button and be directed to the **Filing Details** page to glean more information about the filing.

The Refresh button **-** This button clears any marked **checkbox**.



FILING ASSIGNMENTS

Filings are assigned to Court staff by a Lead Clerk or Administrator. These assignments are displayed in the **Assigned To** column.

ADDITIONAL PAGES ACCESSED THROUGH THE FILINGS AWAITING APROVAL PAGE

- Click the hyperlinked **Tracking #** to be directed to the **Approve Filing** page.
- Mark a filing checkbox and click the **Review and Approve Filing** button to be directed to the **Approve Filing** page.
- Mark a filing checkbox and click the **Details** button to be directed to the **Filing Details** page.

NOTE: The **Filings Awaiting Approval** page is the gateway to the **Approve Filings Page.**

SUMMARY OF THE APPROVE FILING PAGE

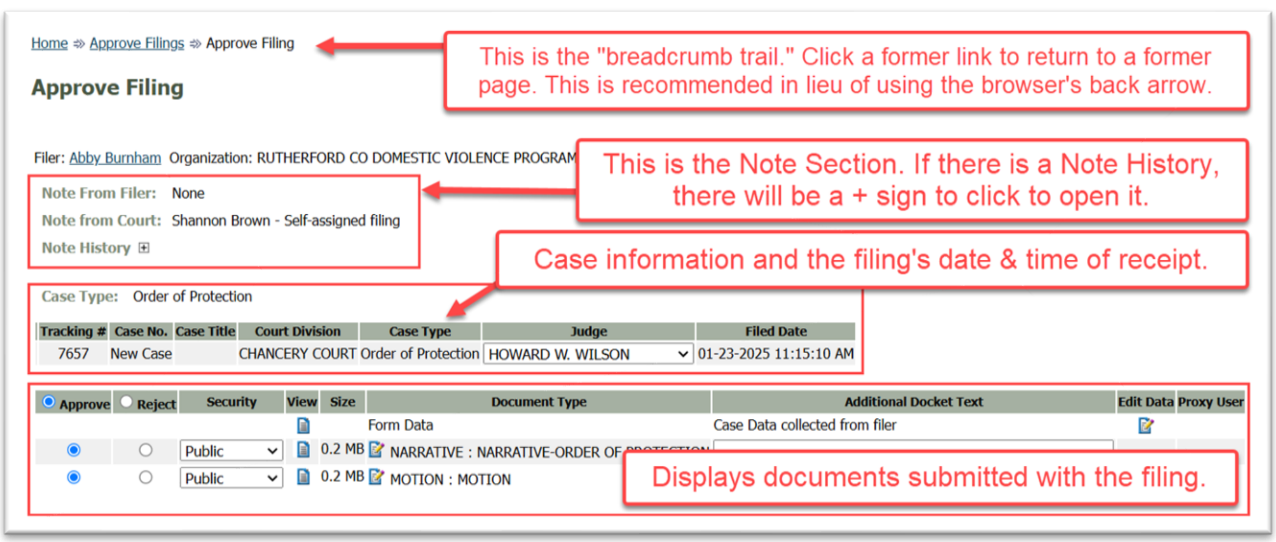
The **Approve Filings** page is accessed only through the **Approve Filings** page by one of two ways:

- Click the hyperlink tracking # on the **Approve Filings** page, or
- Mark a filing checkbox on the **Approve Filings** page and click the **Review and Approve Filing** button.

NAVIGATING THE APPROVE FILING PAGE

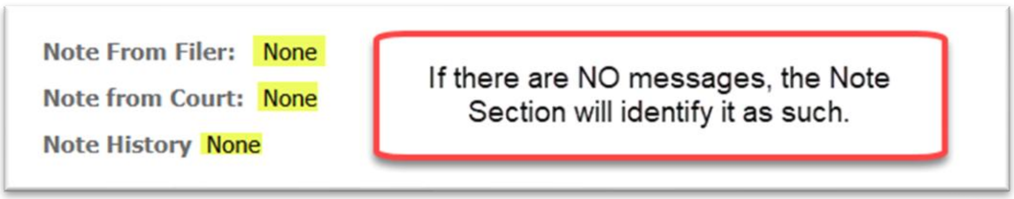
There are currently two operating version of Tennessee TnCIS eFlex – Full Integration and Partial Integration. Most Tennessee courts have successfully transitioned to full integration. For those that have not, a partial integration approval process will be included in this guide.

FULL INTEGRATION VERSION

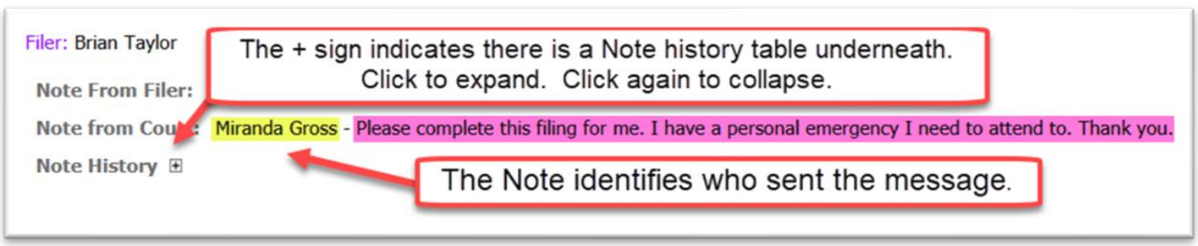


NOTE SECTION

- Check the top of the page in the **Note** section to see if there are messages from the filer or from other court personnel.

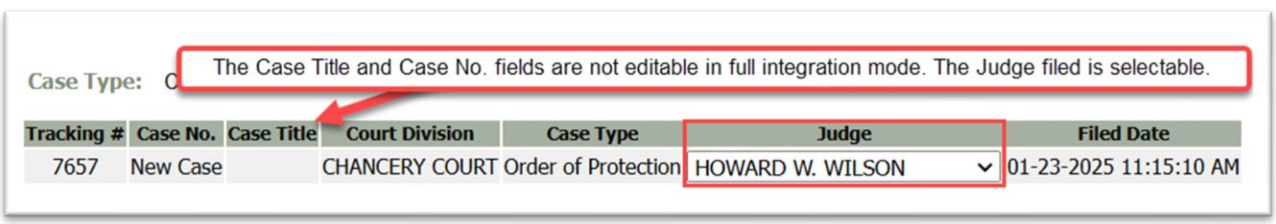


- If a + sign displays next to **Note History,** it indicates there is a note history table underneath. Click to expand and read. Click again to collapse.



CASE INFORMATION SECTION

The top line of the Case Information section displays the following:



a. **Tracking #** - This is a unique tracking number assigned to each filing in **Court Review**, whether it be a submission from an external source (submitted by a filer through the Filers Interface) or an internal source (submitted by a judge originating in a Judicial Queue).

b. **Case #** - For a filing to an existing case, the case number will be displayed. A case initiation filing will display an empty, editable text field. The clerk will need to initiate the case in the court's CMS and manually enter the case number on the **Approve Filing** page once it is generated

c. **Case Title** – The case title will display as it was entered in by the filer in the Filer Interface. For case initiation, this field is an editable field.

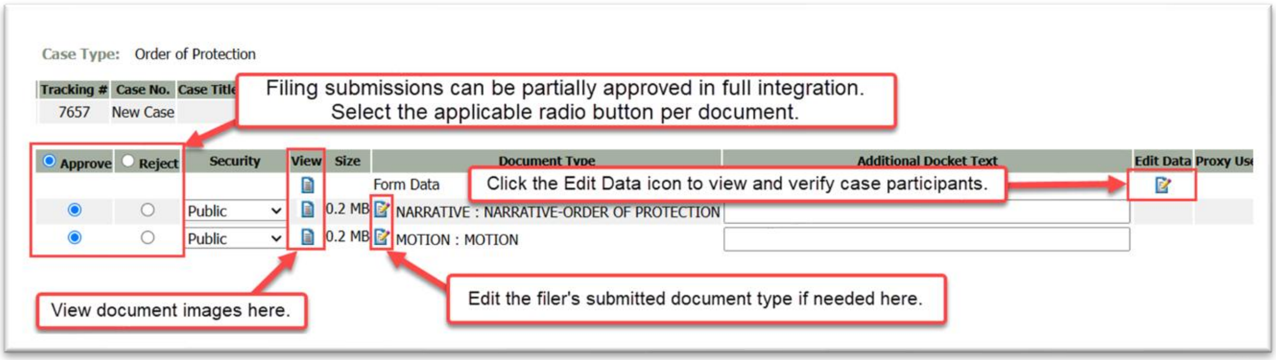
d. **Court Division** – This field will be set by the filer on case initiations. The clerk can modify this field on filings to existing cases.

e. **Case Type** – This field identifies the type of case.

f. **Judge** – This field allows the clerk to designate the judge assigned to this case.

g. **Filed Date** - This is the date/time recorded when the submission was received by the Court**.**

The second line of the Case Information section displays the following:



h. **Approve** – This radio button is the page default. Documents will process as approved if selected.

i. **Reject** – Documents will process as rejected if selected.

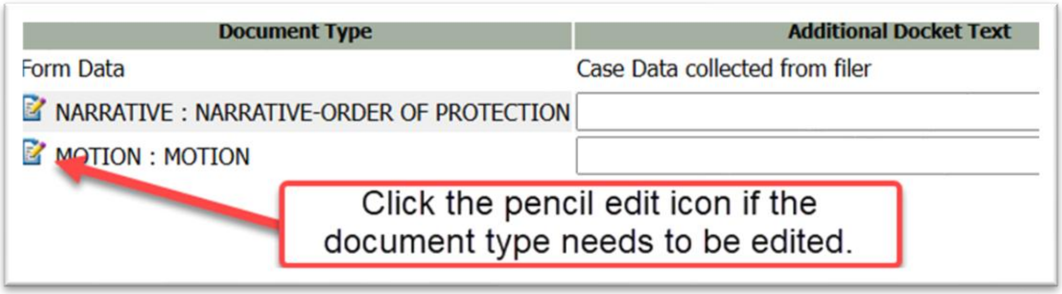
j. **Security -** You can choose between **Public**, **Confidential**, and **Sealed**. The security level will default to "Public" if left blank. Verify that the security level of the document(s) in the left column has been accurately labeled. Follow procedure as established by your office. Edit if necessary.

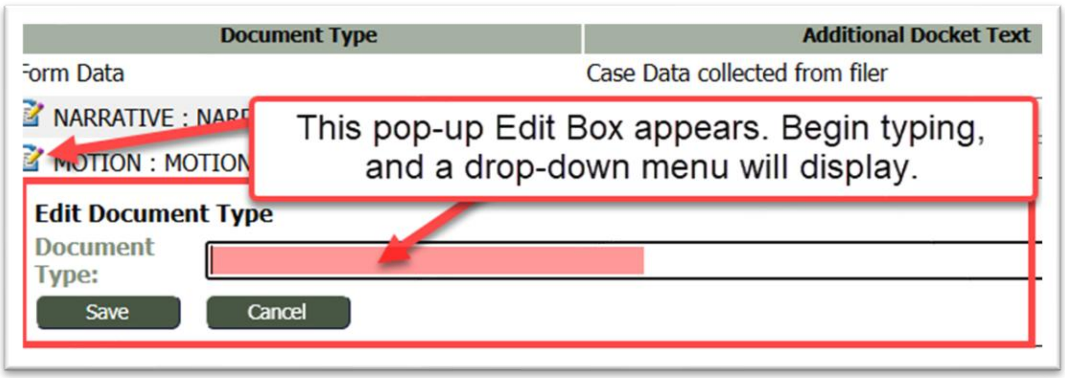
k. **View – Click** the **View** icon to the right of the **Security** column to review the submitted document(s). Verify the documents submitted are consistent with the **Case Type** selected.

> **Note:** If a **Form Data** document type is listed, there is no need to click on its **View** icon. This is computer code used by the system administrator or the system developers for troubleshooting purposes.

l. **Size –** This indicates document size.

m. **Document Type** – If the document type needs to be changed, click the pencil edit icon in the **Document Type** column. A pop-up box will display a **Document Type** field, which is a type ahead field. Begin typing either a description or a code and a filtered list will appear to allow the user to select the correct **Document Type**. For example, if the filer submitted a Motion and it is apparent that it should be a Motion for Continuance, click the **Pencil** edit icon and change the document type to reflect the correct Motion. Be selective when choosing to change a document type for it may affect the fees associated with the filing or the routing of the document after it is approved.





n. **Additional Docket Text -** This field is optional and available to describe the document in greater detail should the filer or court staff feel it necessary. Some courts choose to add the party name identified in the document if the document type is a Notice of Appearance.

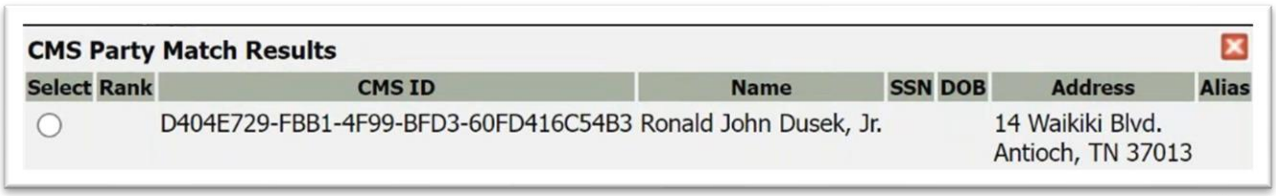
o. **Edit Data** icon – This icon is only present on certain documents or forms that have additional data collected by the system.

Two specific examples when a clerk would need to click this icon:

- For case initiation, it is recommended that the clerk click the **Edit Data** icon to be directed to the filer's Case Initiation page to view the case participants and perform a party match search.
    1) On the Case Initiation page, click the hyperlink case participant name to be directed to the **Edit Party** page.
    2) Click the **Verify** button next to the **User Identifier** text box to check if TnCIS has this case participant entered as an existing party in the database.

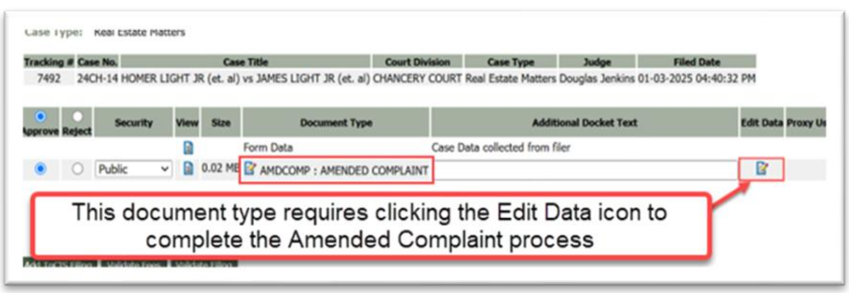
If no CMS Party Match Results appear, scroll down, and click **Next**. This participant will be entered as a new party within TnCIS. If there is a match, verify if it is the same individual or only similar. If they are the same, **select** the circle **radio button**.

That party's information will autofill the **Edit Party** text fields. If they are different individuals, add additional information (if available) to the new participant to distinguish them.

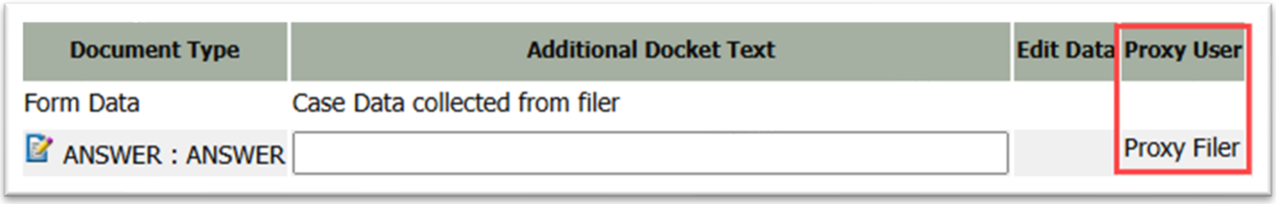


3) Make any edits necessary for the case participant, such as modifying the **Party Type** role selected.
4) Click the **Next** button at the bottom of the page to return to the **Case Initiation** page.
5) Repeat the steps with the other case participants listed, if desired. Click the **Next** button to return to the **Approve Filing** page.

- For an **Amended Complaint**, it is required that the clerk click the **edit data** icon to be directed to the **Amended Complaint** page to electronically request additional case participants be added to the case.
    1) On the **Amended Complaint** page, view the listed case participant and add the participant to the case in the court's CMS manually.
    2) Click **Next** button to return to the **Approve Filing** page.



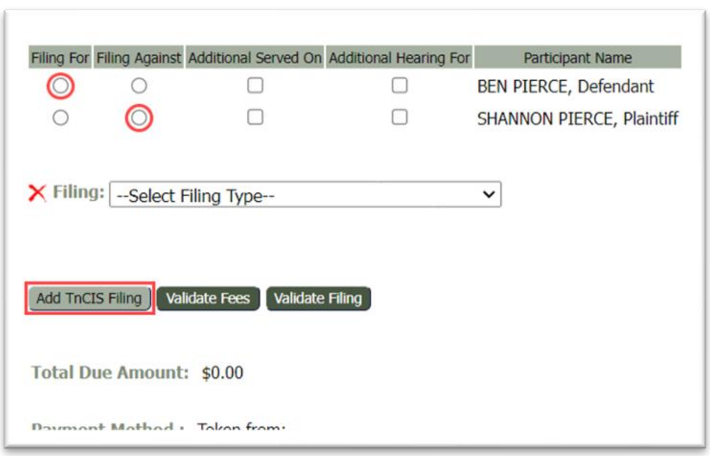
f. **Proxy User –** If the filer is a proxy user associated to an attorney's account, it will be visible here. Proxy users are legal secretaries who file under their attorney's account.



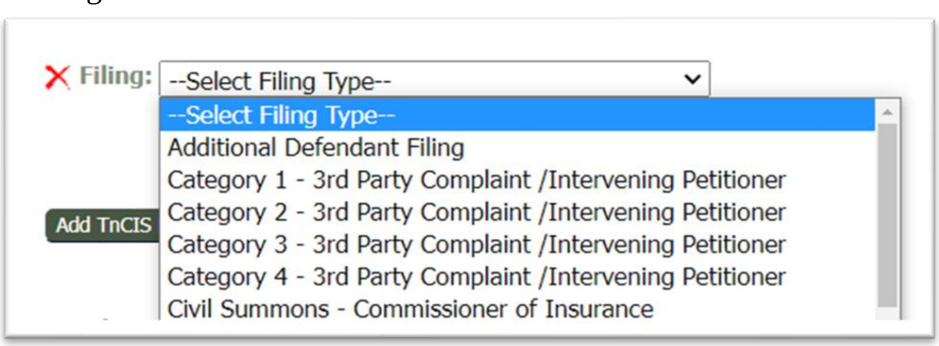
PAYMENT SECTION

eFlex uses TnCIS Filing Fees in order to populate statutory court fees directly from TnCIS. The AOC assists in populating the fee data tables that control the fee amount. If any discrepancies in the fee amount or the available TnCIS Filing Fees, please contact the AOC for adjustment.

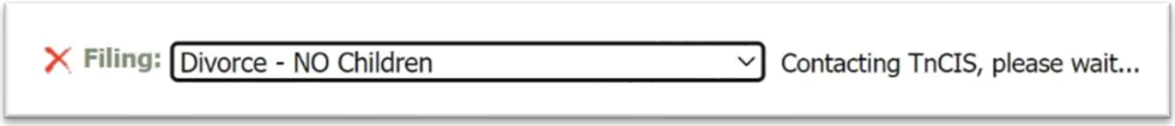
1. Click **Add TnCIS Filing** and designate the **Filing For** and **Against** fields. Use **Additional Served On** and **Additional Hearing For** fields if there are three or more parties on the case.

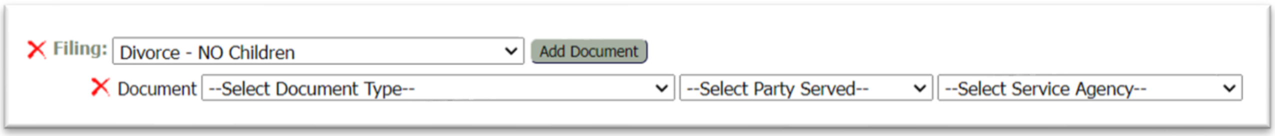


1. Click **Select Filing Type** and search through the drop-down menu to choose the applicable filing. The filings in this list are populated from TnCIS and would have appeared there when the clerk would previously select the filing to attach fees in the CMS using the partial integration method.

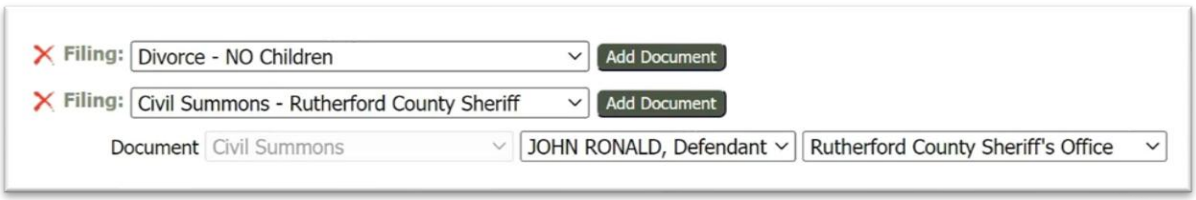


eFlex will communicate with TnCIS to see if there are any documents associated with this filing type. If there are, the clerk will be able to add them.

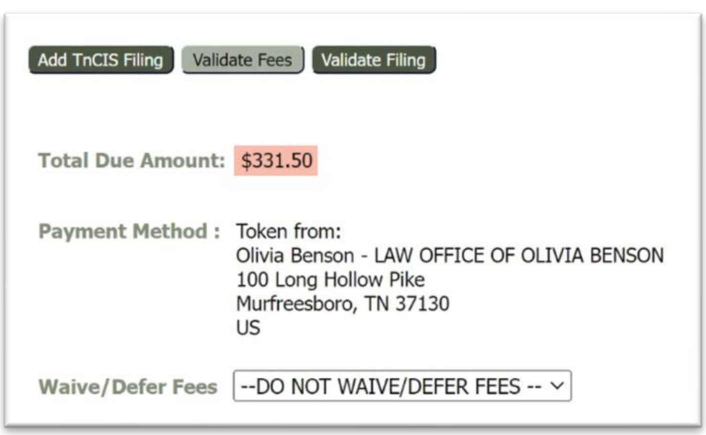




2. Click **Add Document** if necessary.
3. Choose the desired **Document Type**, the **Party Served**, and the **Agency** serving the document. You can add more than one TnCIS Filing if needed



4. Click **Validate Fees** and verify the correct amount populated.



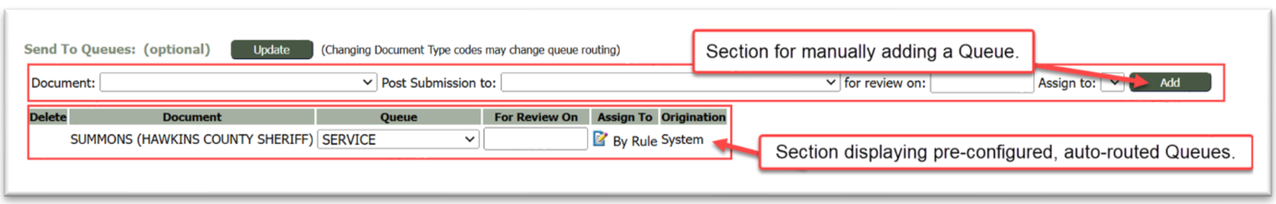
Filings will specify a **Payment Method** to correspond with the amount owing if court fees are due with the submission. As part of the filing process, the filer is directed to the third-party payment vendor to make these arrangements. Click the down-arrow in the **Waive/Defer Fees** field to select a waiver reason when appropriate.

QUEUES SECTION

5. **Send** the documents to a **Queue** (optional).

- Some eFiled documents require additional work or attention after clerk approval. This is why they are routed to queues after they have been approved. Each task is identified as a queue entry.
- Many of these documents are pre-configured to auto-route to a queue after they have been approved, such as a proposed order going to a **Proposed Order** queue so that the judge can review it and act on it.
- Some document types, as determined by the clerk, may be manually routed to a queue for additional work.

Note: If the **Document Type** on the filing has manually been changed, click the **Update** button to the right of the text **Send to Queues**. This will refresh the page and add any pre-configured queues associated to the new changed document type.



#1 QUEUES – PRE-CONFIGURED DOCUMENT TYPES TO AUTO-ROUTE TO QUEUES

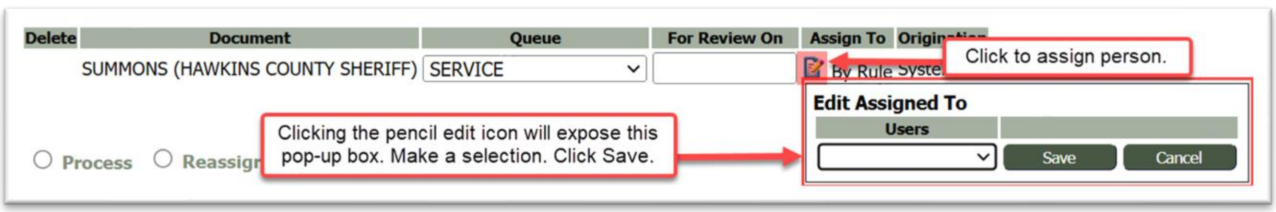
- If a document type has been configured to auto-route to a queue, this queue information will automatically display on the **Approve Filings** page.
- The name of the queue will be listed in the **Queue** field**.**
- The field **For Review On** is an optional field which, when clicked, will pop up a calendar and allow the user to defer the task to a selected future date. The task will then appear on the **My Queue Entries** page at the later date.

  Note: If the assigned individual selects **All** inside the **Review Date** field on the **My Queue Entries** page, they can see current and future assignments.

- The **Assign To** field displays a **pencil** edit icon. Clicking the down-arrow will display a list of individuals who have been configured as viewers to this queue and to whom an assignment may be made (if the only selection available is the verbiage **Not Assigned**, then the configuration for the queue has not been completed).
- Select the name of the individual who is to be assigned to the task. Only one name may be selected.
- Click the button **Save** or **Cancel**.

Note: If the selected assigned individual has marked the checkbox on their **Profile** page to **Receive Notifications** when they are tasked with a queue assignment, then selecting their name at this point will trigger a courtesy email to be sent to them, notifying them of the queue entry assigned to them. The email will contain a link that when clicked with direct them to the login page of Court Review. If a judge has been assigned to a case and has opted to receive NEF's (Notice of Electronic Filings), they will be alerted that a filing has come in and can anticipate that a queue entry will likely be assigned to them.

Note: If the clerk approving the filing either fails or chooses not to select a specific person for the queue entry, the task will be sent unassigned to the queues and no one will be alerted that the task is there awaiting attention. Some courts purposely create this workflow so that queue entries are sent to a "pool" where staff members share the responsibility of re-assigning the queue entries to the proper person. Other courts identify one person to oversee re-assigning queue entries from inside the "pool."

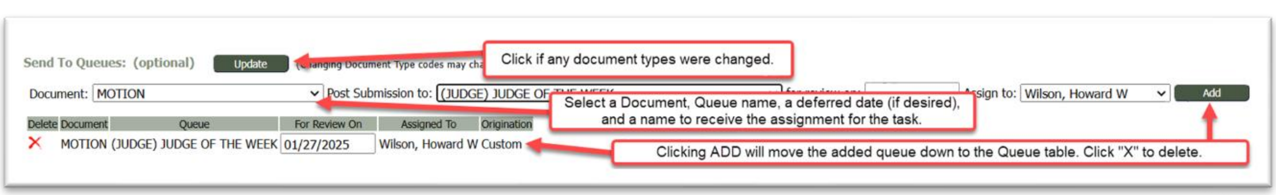


Note: The **Update** button, next to **Send To Queues**, should be clicked if any edit changes are made by court staff on the **Approve Filings** page to the filer's original submitted document type. This will refresh the page and add additional queue(s) if the new document type is tied to any pre-configured auto-routing to a queue.

#2 QUEUES – MANUALLY ROUTING DOCUMENTS TO QUEUES

If a clerk chooses to manually route a filing to a queue for additional work:

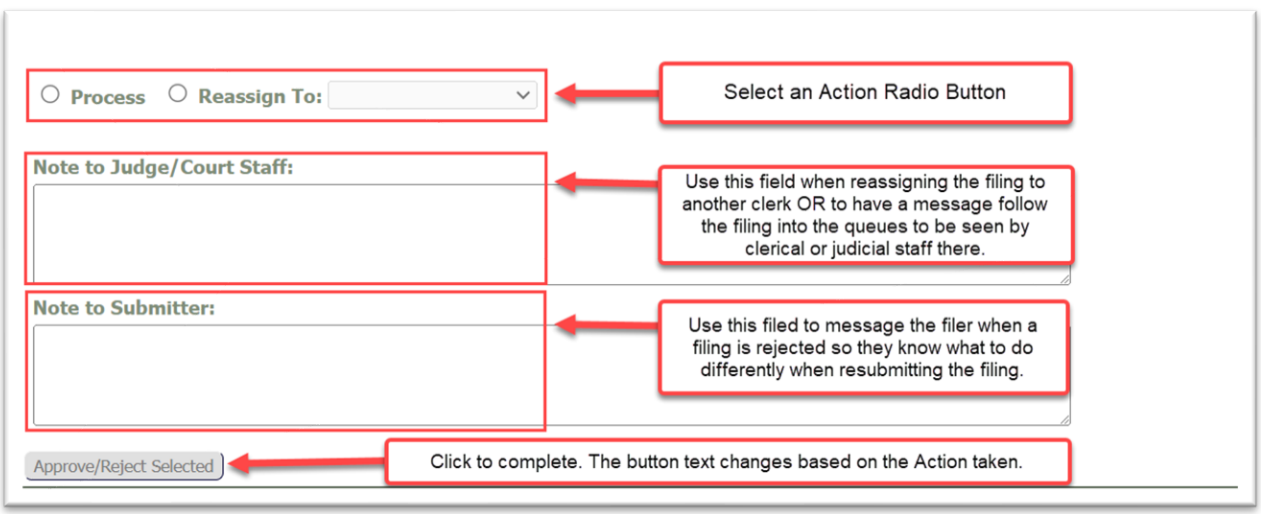
1. Click the **Document** field.
2. Select which document from the submission to send to the queue.
3. Click the down-arrow in the **Post Submission** field.
4. Select the desired queue from the drop-down listing.
5. Click the optional field **For Review On** if the queue entry needs to be deferred for review on a future date. Make a date selection.
6. Click the down-arrow in the **Assign To** field to make a name selection.
7. Click the **Add** button. This will populate the **Queue** column with the newly added information. An **X** is provided if deletion is necessary.



PROCESS SECTION

Select the appropriate radio button to complete the task on the **Approve Filing** page.

- The **Process** button will process the filing according to the criteria selected adjacent to each document type submitted.
    - **Approve** – If the clerk marked the document for approval, all the information in the filing will be recorded in the CMS systematically, and the document images will be stored electronically in the DMS for retrieval. The filing status returned to the filer will be **Filed**. Certain document types, including all Proposed Orders, have been pre-configured to not be stamped, nor placed in the CMS or DMS. Instead, it is the responding Order issued by the Court that will be stamped and added in the CMS once processed.
    - **Reject** – If the clerk marked the document for rejection, the information in the filing will not be recorded in the CMS nor will the documents be stored in the DMS. The filing status returned to the filer will show as **Rejected**. Enter a comment in the **Note to Submitter** text field explaining the reason for the rejection. The filer will know what to fix in order to resubmit the filing. Please note that when a partial approval is made, the rejected document is returned to the filer while the approved document is stamp filed and stored in the CMS.
- If **Reassign To** is selected, choose from the court personnel dropdown list and type a note of instructions in the **Note to Judge/Court Staff** text field.



Note: For clerk convenience, there is a configurable field available for **Predefined Clerk Notes** that allows the clerk to quickly select from a drop-down list of the most commonly used messages that are sent to a filer when a filing is rejected. Selecting one auto-populates the **Note to Filer** field.

Click the **Approve/Reject Selected** action button at the bottom of the screen. The user will then be directed back to the **Filings Awaiting Approval** page. The filing recently worked on will no longer be listed on the **Filings Awaiting Approval** page; however, if **Reassign To** was selected, the filing will display on this page along with the name of the person who received the assignment to review the filing.

6. **Process** the filing.

Note: If the payment is rejected once you click **Approve**, the filing will return to the **Approve Filing** page with a note saying the payment did not go through. You can then reject the filing or approve the filing without taking payment by selecting a **Waiver**. The case will be created in the CMS and maintain the status that the fee is still outstanding and has *not* been paid.

PARTIAL INTEGRATION VERSION

1. Log into **Court Review** with your **username & password**. Click the **Approve Filings button** (or hover over the **Filings Tab** and select **Approve Filings** from the drop-down menu) to be directed to the **Filings Awaiting Approval page**. Click the *hyperlink tracking#* of the filing. You will be directed to the **Approve Filing Page.**
2. Click the **Edit Data icon** on the line of the **Form Data – case data collected from filer**. This will open the **Case initiation page** from the filer. Click the **+sign inside the square** in front of the case participant's name to display the information about them.

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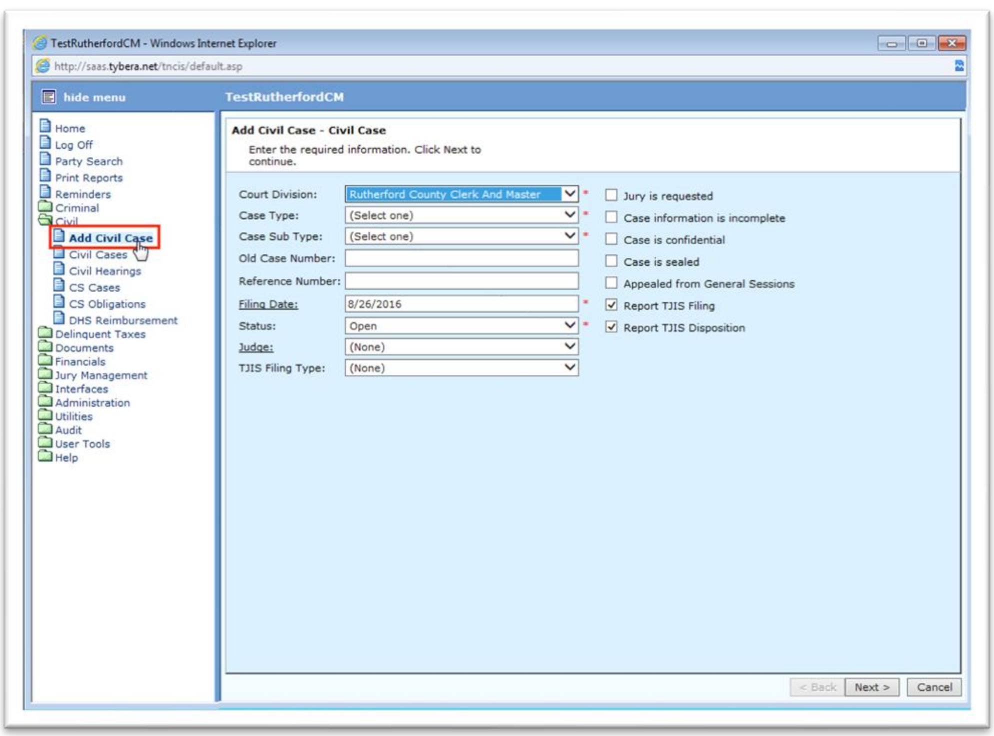
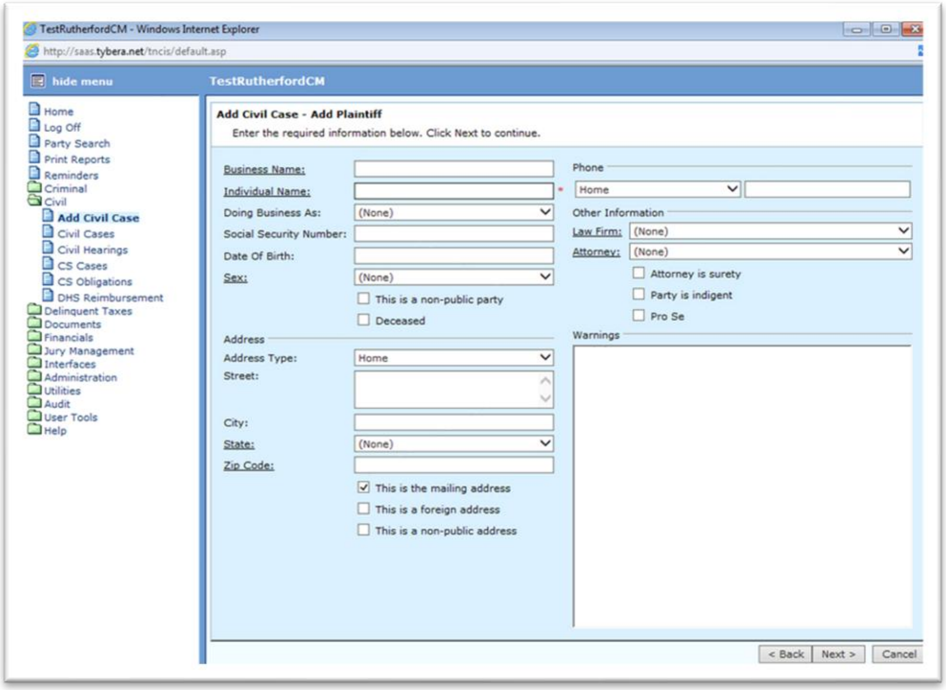
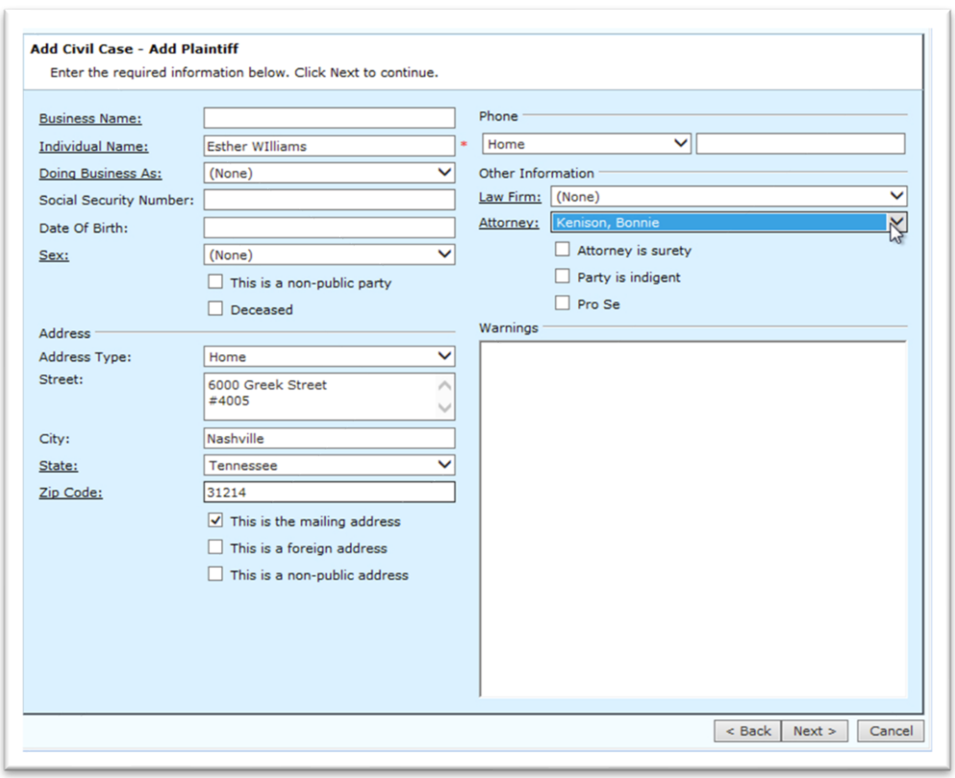
3. Log into the **TNCIS application**, click "Civil" and then click "Add Civil Case."



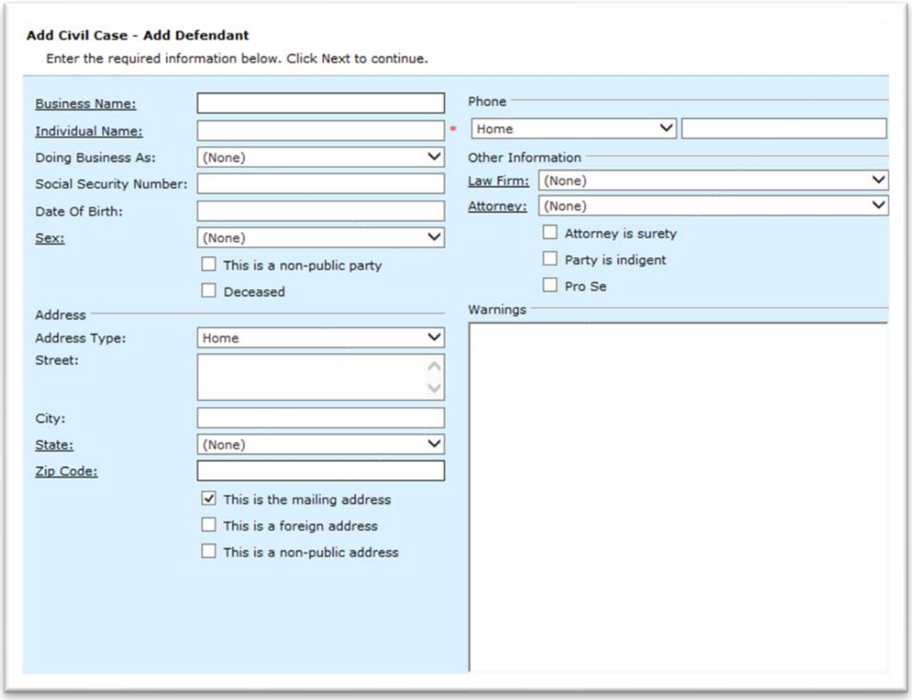
11. Select **Case Type, Sub-Type**, and **Judge**. Click **"Next**."
12. Enter **Plaintiff information**, taken from the **Court Review page**.



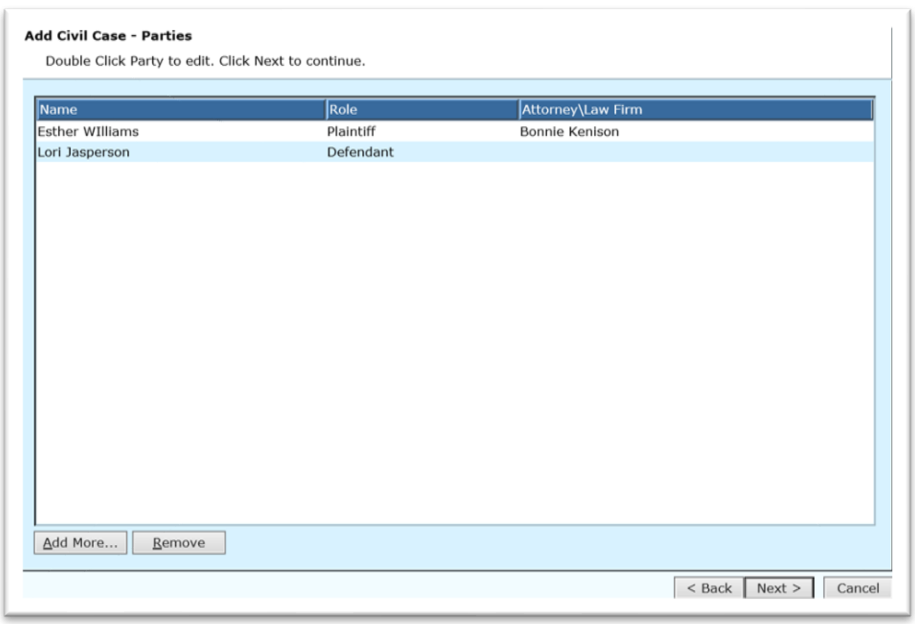
13. Select **Attorney** from the drop-down list and click "**Next.**".



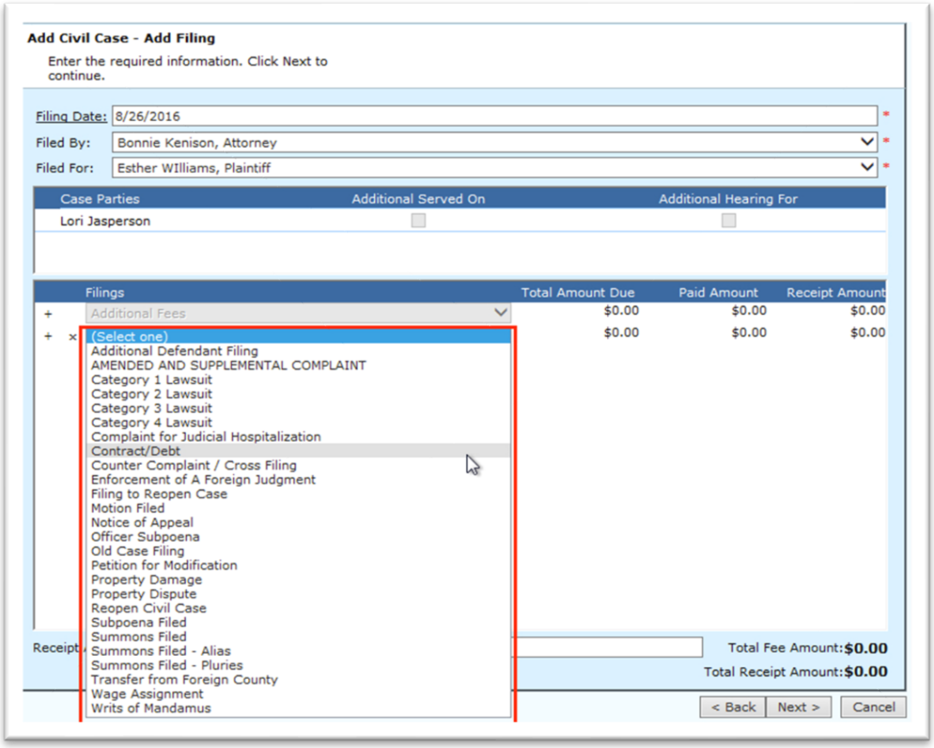
14. Enter **Defendant** information and click "**Next.**"



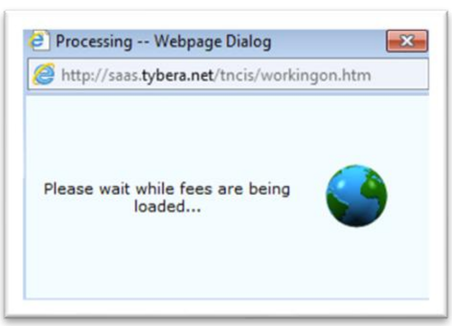
15. Click "**Next"** again.



16. On the "**Add Civil Case - Add Filing**" page, verify information you entered. Under the "**Filings**" section click on the **drop-down** to add a filing fee. Then click somewhere in the interface.

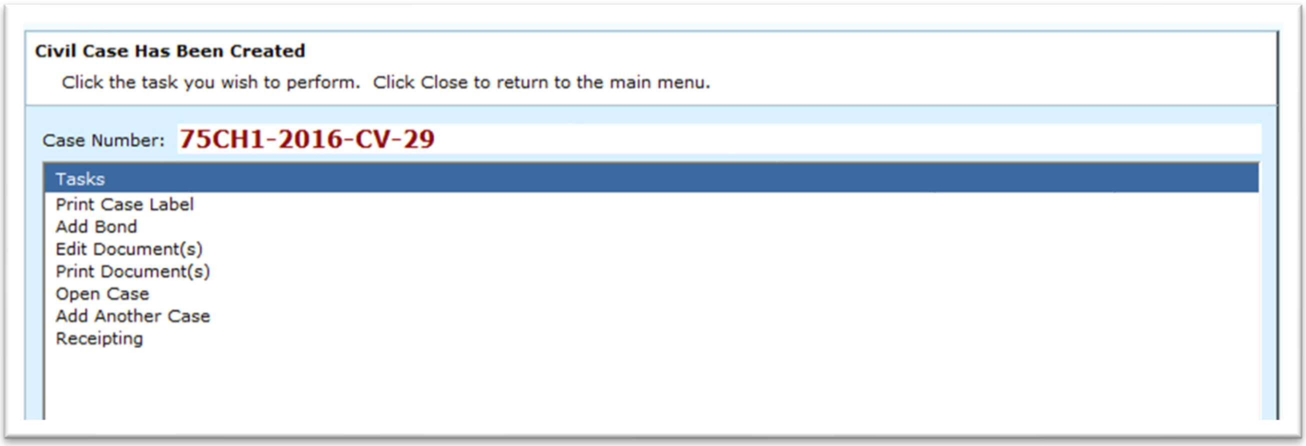


A turning globe will display, indicating the system is processing your selection.

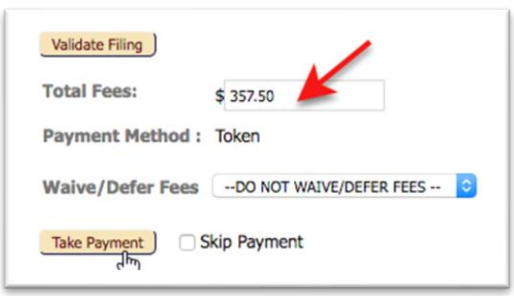


17. Fees will display. **Note the amount** that is displaying in the **Receipt Amount text field**. This amount will ultimately be entered into **Court Review.** Zero out the amount for now and click **Next.**

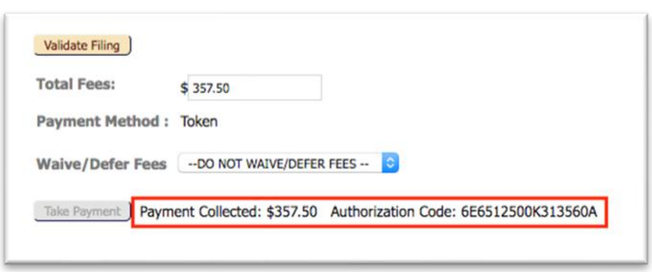
18. Continue to click **Next** until you reach a page with a **Finish** button. Click **Finish**. You should then see a page with a case number displayed.



19. Returning to **Court Review**, on the **Approve Filing** page for the specific filing, enter the total fee amount into the **Total Fees field** and click the button "**Take Payment.**"



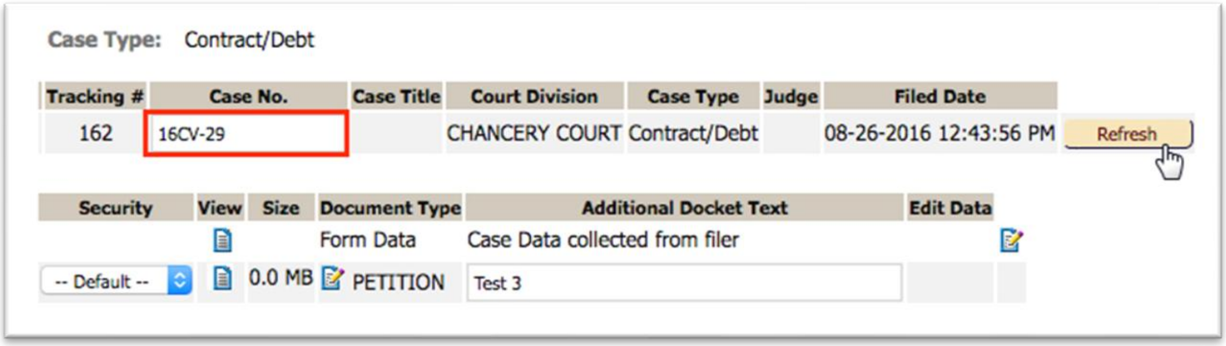
20. eFlex will communicate to the payment system and then display the amount collected followed by an authorization code.



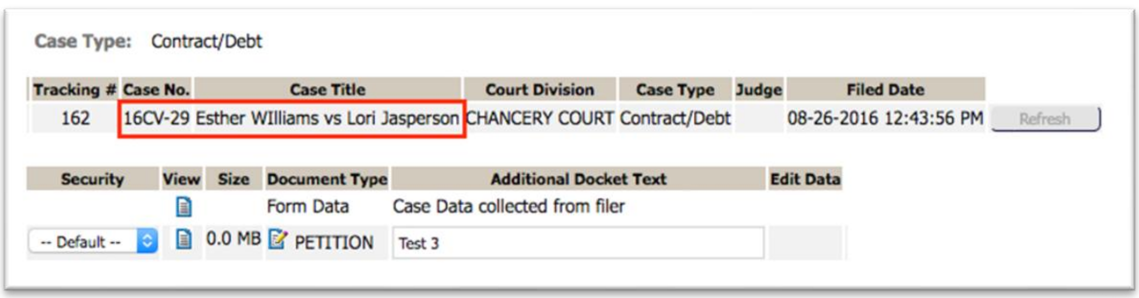
21. Return to the **TNCIS CMS** and note the **case number** that is displaying. Return to **Court Review** and enter the case number, editing what TnCis has into this abbreviated format:

> YYCV-XX (last two digit of year, two character code, followed by a dash and the case number) "16CV-29"

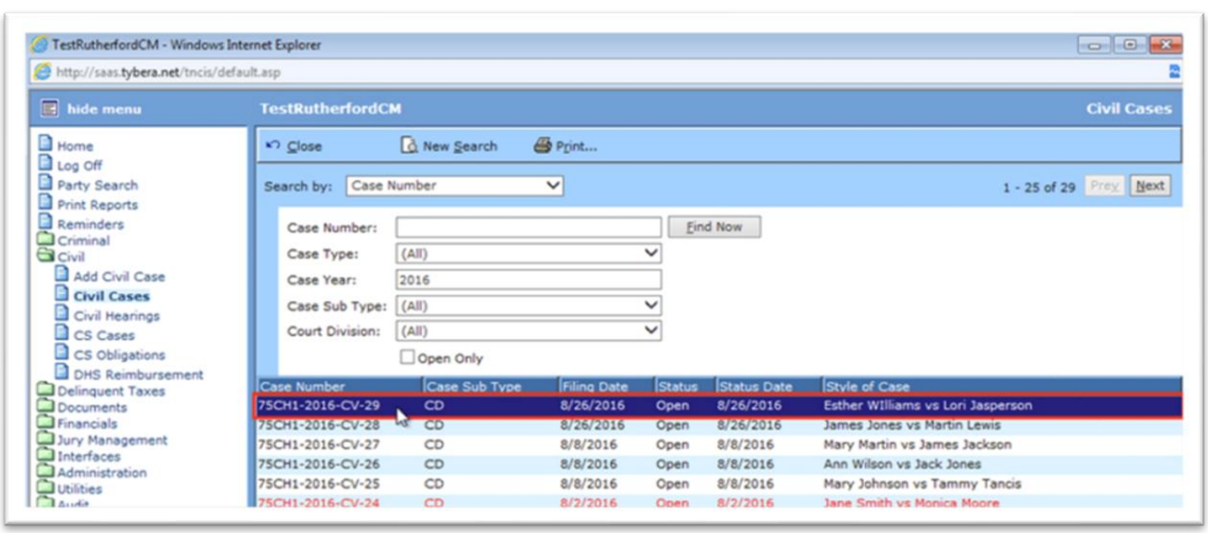
22. Click the **Refresh button** at the end of the row



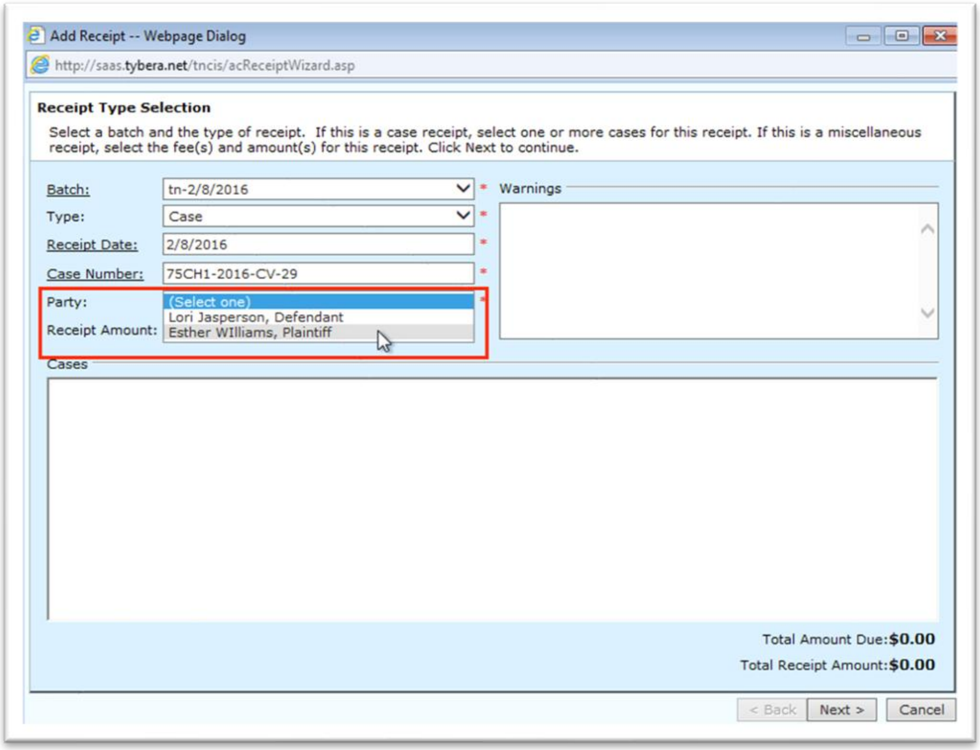
This action will communicate with TnCis and pull the **Case title** and **Case number** into their provided fields.



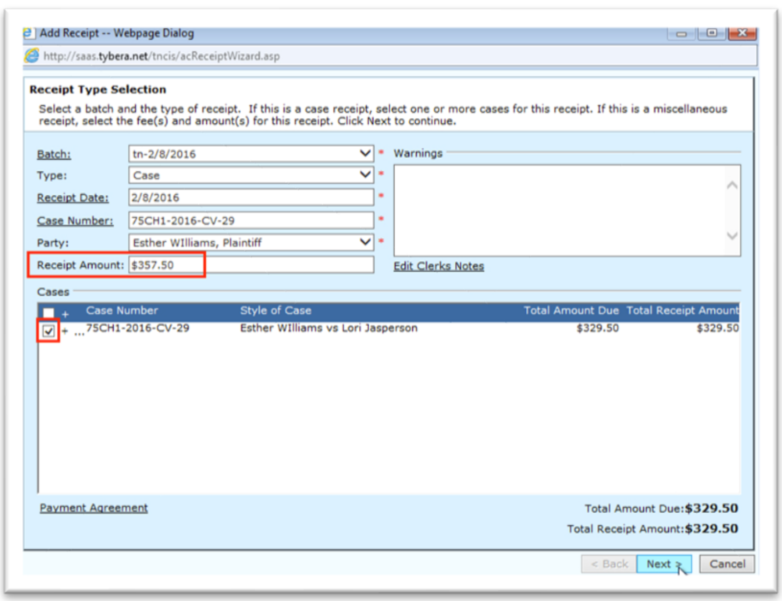
24. Returning to TnCis, click **Close** and then click **Civil Cases**. This opens a list of cases. Locate the one you created and double-click.



25. In the bottom right pane locate **Receipting link** and click on it.
26. Select the **Plaintiff** from the **Party drop-down field.**

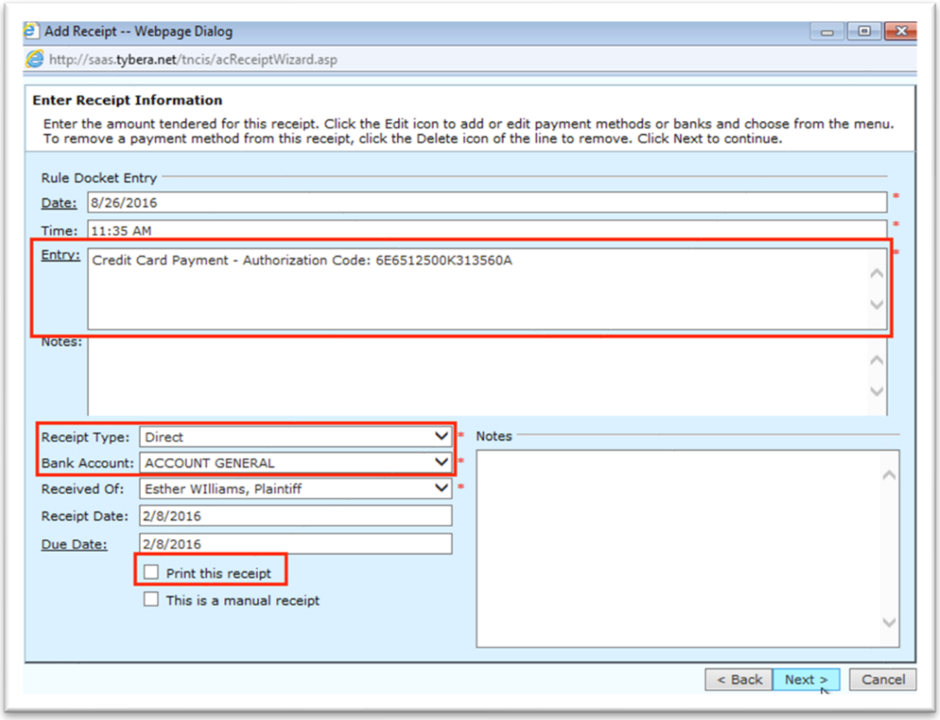


26. Enter the **Receipt Amount** as well as select the checkbox for the case. Click **Next.**



27. On the next page:
    a) In the **Receipt Type drop-down**, select **Direct**,
    b) In the **Bank Account drop-down**, select **ACCOUNT GENERAL**, and
    c) For the checkbox **Print this receipt,** keep it unchecked.

d) Also enter a note in the **Entry text box**, such as cc: Authorization code: 6E6512500K3135601A



28. Click **Next** and **Finished.**
29. Back in **Court Review**, approve the filing.
30. Go to the **Filing Report page** and verify that the filing doesn't go **On Hold**.
31. Click on the *hyperlink case number* and verify that from the **Case Summary page** that you can access the document. Also verify that the document is time stamped.

APPROVING AN EXISTING CASE FILING WHEN A FEE IS REQUIRED:

The process for taking payment on an existing case will be the same as taking payment for a new case. Review those steps here: FULL INTEGRATION VERSION - PAYMENT
You will not need to select a judge for the case nor validate existing parties on the case. Verify that a notification is sent to filer. (Hover over the **Filings Tab** and **Select Notifications** and then **Filer Notifications** from the drop-down menu.)

QUICK STEP SUMMARY OF HOW TO APPROVE/REJECT A FILING

1. In Court Review, click the **Approve Filings** button from the **Home** page or hover over the **Filings** tab and select it from the drop-down list.

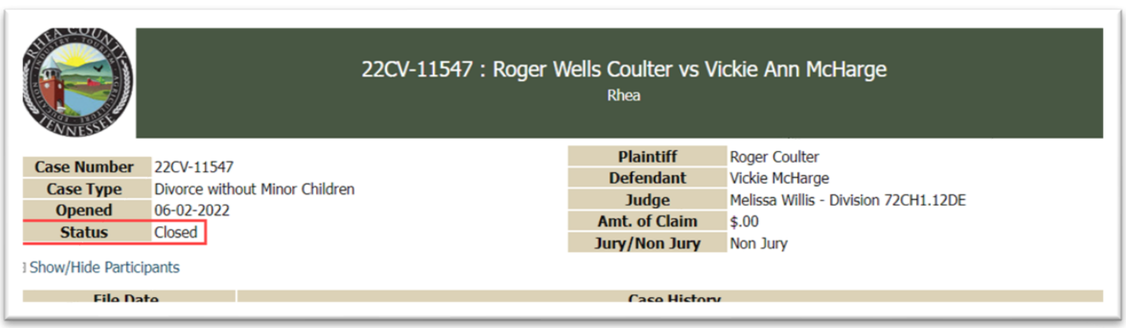
Note: The number in parentheses next to the **Approve Filings** button displays the number of filings awaiting approval.

2. On the **Filings Awaiting Approval** page, use the search criteria filters to change what filings appear in the data table below.
3. To step into a filing awaiting approval, click the hyperlinked **Tracking #** on the line of the filing to be approved. This directs the user to the **Approve Filing** page.
4. Review and act on the various fields of information as necessary: **Note History, Security level, Document Type, Edit Data** icon**, Queues, Assign Queue**, and the Payment section.
5. Select the appropriate radio button: **Approve, Reject,** or **Reassign To**.
6. Enter a message in the **Note** field to court staff or filer, as needed.
7. Click the **Approve/Reject/Reassign** action button at the bottom of the screen. If a filing is to be rejected, enter a reason in the provided field so the filer knows what to do differently to resubmit the filing.

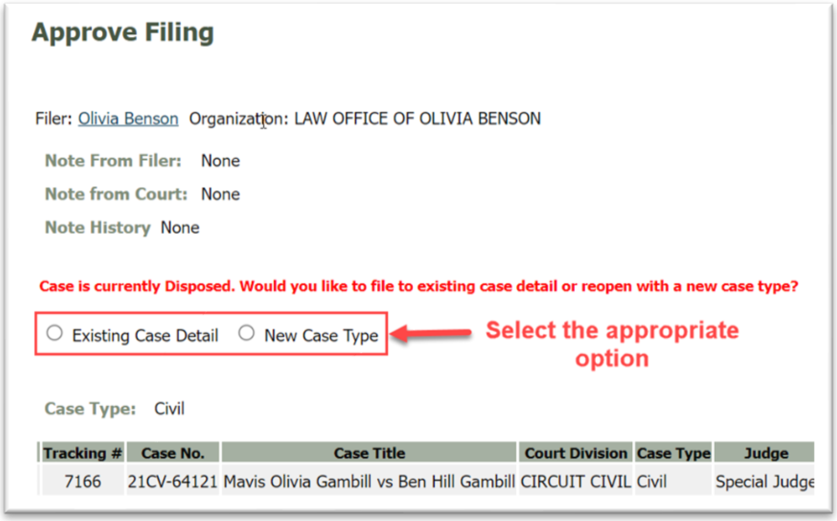
FULL INTEGRATION: ADDITIONAL FEATURES

FILING TO A CLOSED CASE

a) Locate a closed case to which to file.



b) Submit a document (e.g. Petition) to the case on the **Filer Interface**.
c) Navigate to **Court Review** and open the **Approve Filings** page. Step in to the filing.



A red message above the **Case Type** field will notify the clerk the "Case is currently Disposed."

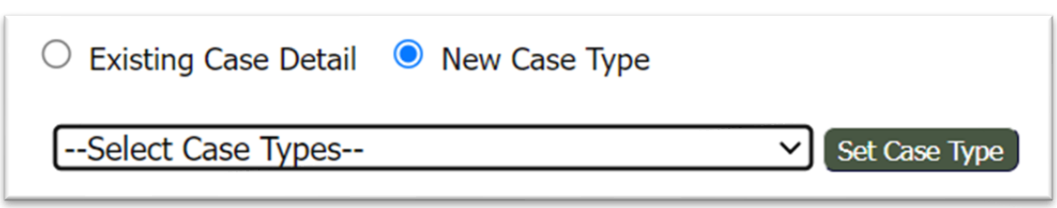
How to file to a closed case:

a) If the document being filed was filed in the paper world before the case was closed, you can leave the case as closed and file to it by selecting **Existing Case Detail** and choosing the **Closed** case in the drop-down menu.

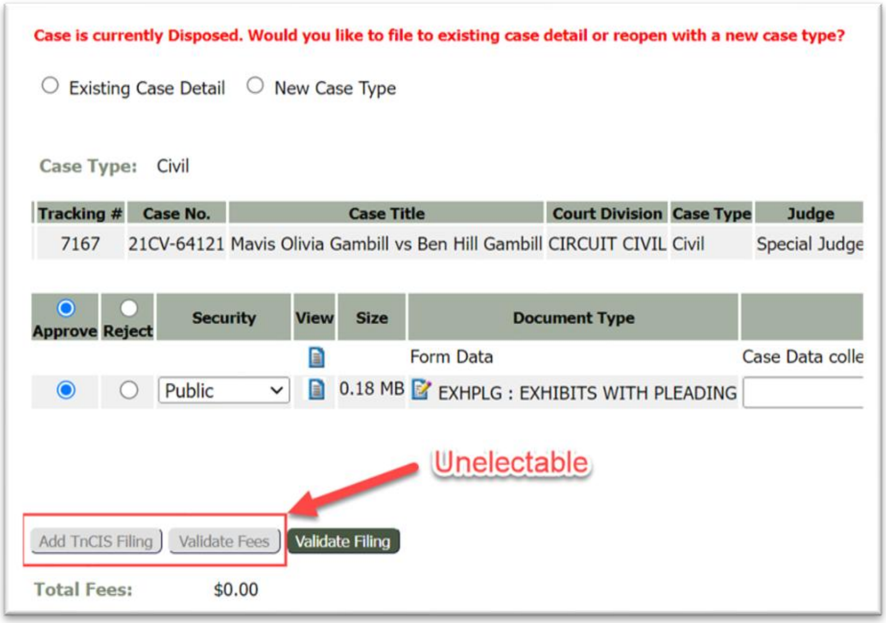
b) Click **Set Case Type**.

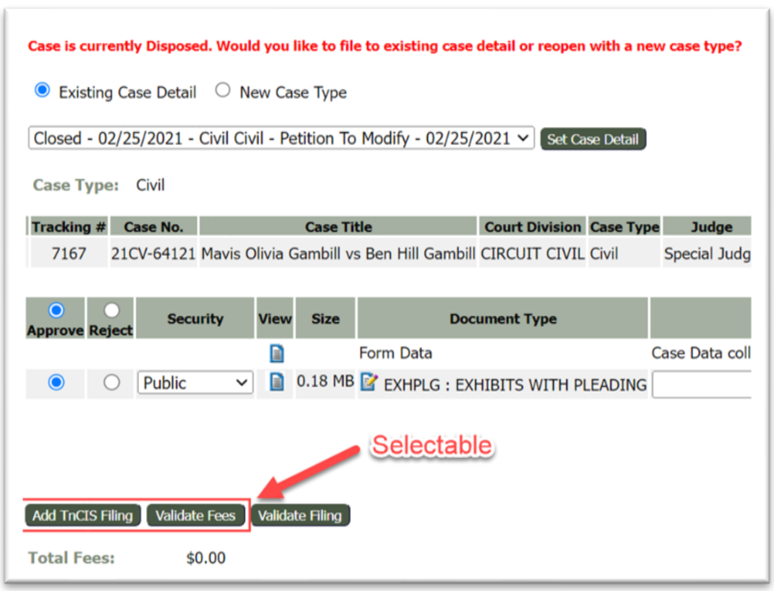
How to file and reopen a closed case:

a) If the document submitted will reopen the case, the clerk will need to designate the case type that will be reopened by selecting **New Case Type**.
b) Choose the applicable case type in the drop-down menu.



c) Click **Set Case Type**.
d) Once selected, **Add TnCIS Filing** and **Validate Fees** buttons will become toggleable.





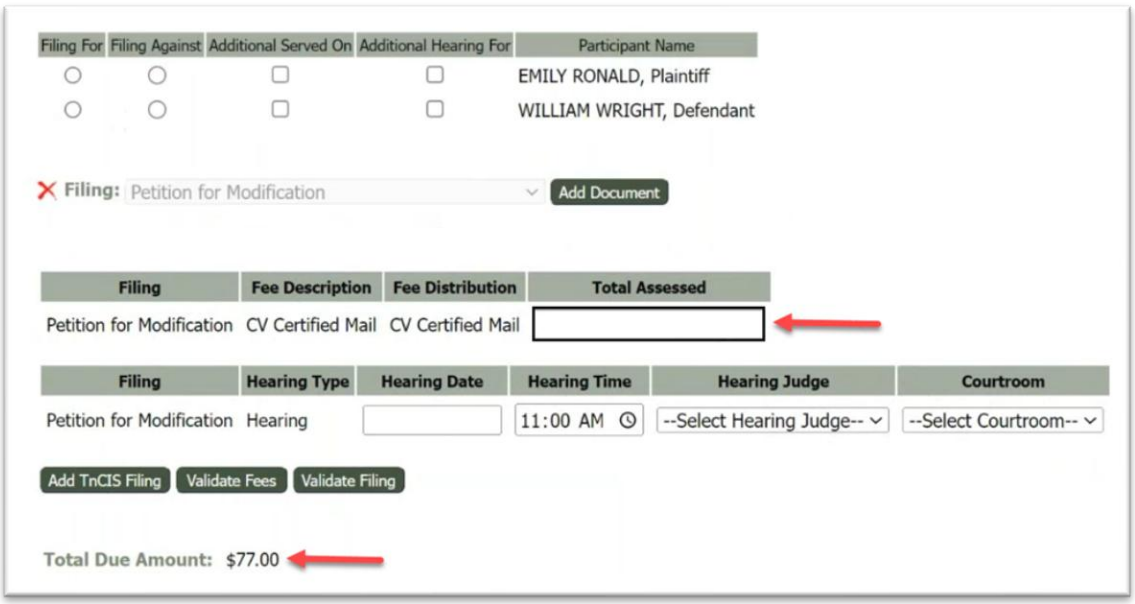
e) Continue adding in **TnCIS Filings** as usual.
f) **Process** the filing.

ADDING "PERCENT FEES" AND SETTING HEARINGS

Percent Fees are fees where the amount can be specified by a clerk, and 100% of that fee will be added to the total statutory court fees incurred by that filing. This feature is only triggered by specific TnCIS filing types, and Local Government can help configure which filings will need this feature.

In the following example, we used the filing type "Petition for Modification" solely for demonstrative purposes. We had configured this filing type to trigger both the percent fee and the set hearings features for convenience.

1) **Open** a filing that needs to be approved.
2) **Review** the filings as normal and select your **TnCIS Filing**(s).
3) **Select "**Validate Fees.**"**
4) **Add** the additional fee required in the **Total Assessed** type-ahead field.



As soon as the amount is entered in the **Total Assessed** field, the **Total Due Amount** will reflect the addition.

You do not need to select "Validate Fees" a second time. Once you have entered the fee and everything looks complete, you can move forward with your approval.

Setting Hearings

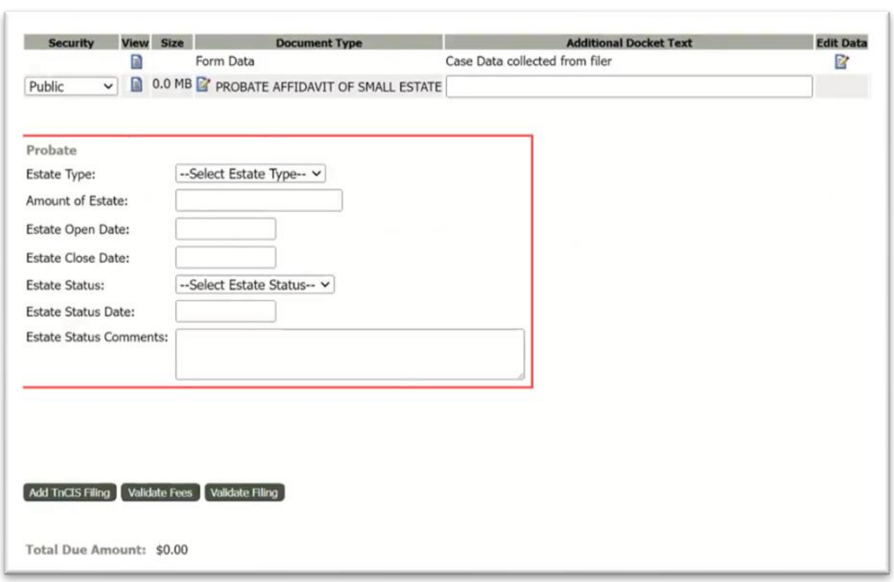
Some courts may not use the Set Hearings feature in Court Review. If it is a feature you do not currently use but wish to add to your court account, contact Local Government to configure it in TnCIS first.

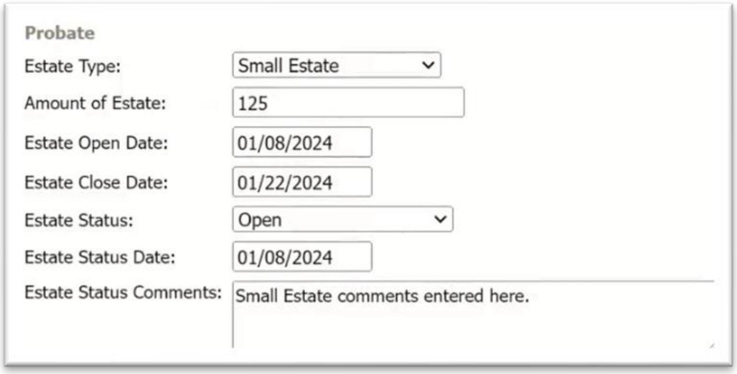
1) Add your **TnCIS Filing** and select “Validate Fees.”
2) The Set Hearings feature required clerks to designate the **Hearing Date**, **Hearing Time**, **Hearing Judge**, and **Courtroom** used for the hearing to be properly scheduled.

3) **Process** the filing, and the hearing will be scheduled in TnCIS.

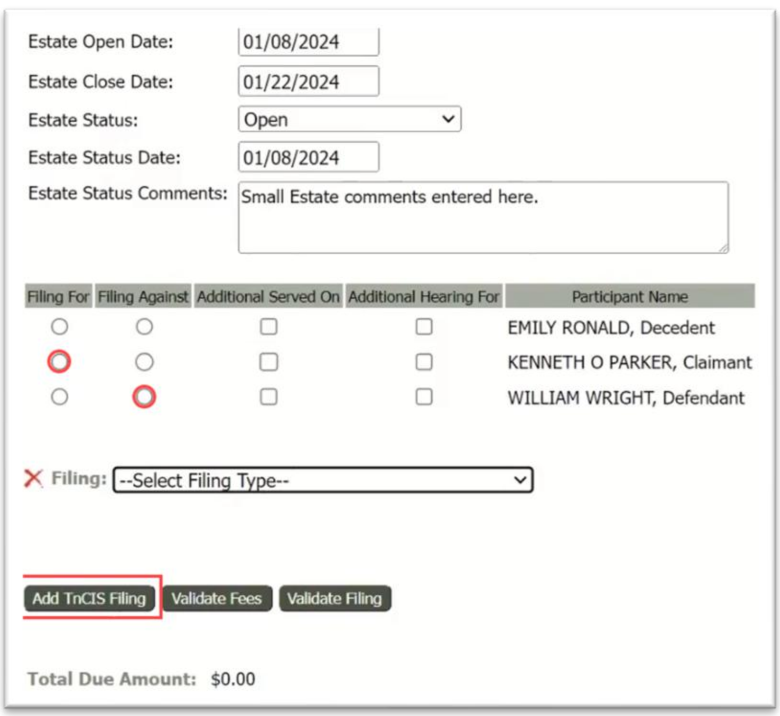
FULL INTEGRATION: PROBATE ESTATE CASES

1) Complete the **Probate** text fields as applicable for the case.





2) Click **Add TnCIS Filing** and select who the filing is **For** and **Against**.
   a) The **Filing For** field needs to be the **Claimant** on an *Estate Claim.*
      i) The **Filing Against** field needs to be the **Defendant** on an *Estate Claim*.
   b) The **Filing For** field needs to be the **Defendant** on a *Claim Against Estate*.
      i) The **Filing Against** needs to be the **Claimant** on a *Claim Against Estate*.



If you add the incorrect **Filing For** party, the system will prompt you to rectify the mistake before validating the fees.

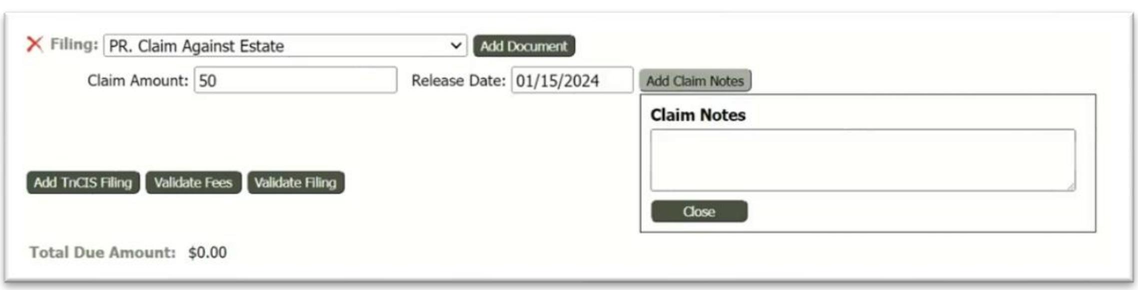
Example: Estate Claim

Example: Estate Claim Exception

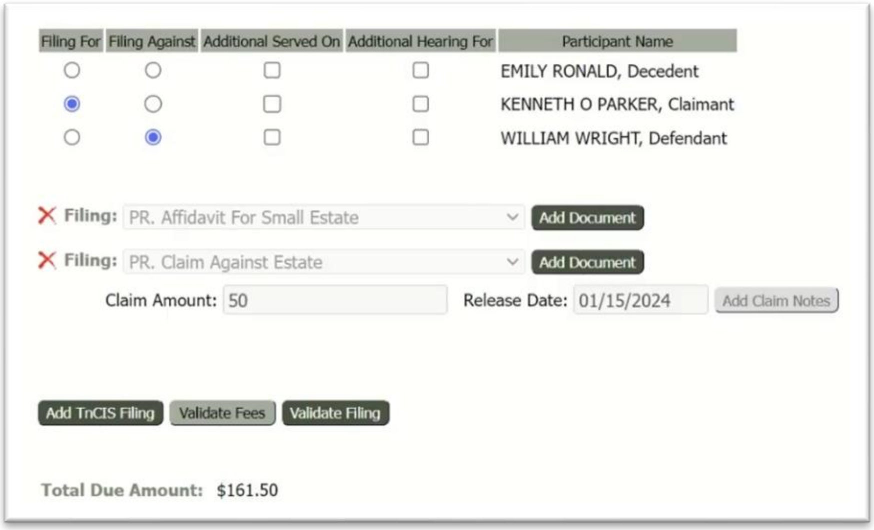
3) Click **Select Filing Type** and search through the drop-down menu to choose the applicable filing. The filings in this list are populated from TnCIS.

A **Claim Amount** and **Release Date** text field will appear when a **PR. Claim Against Estate** is selected.

A clerk may **Add Claim Notes**, and the notes will be stored and passed to TnCIS upon approval.



4) Click **Validate Fees** and verify the correct amount populated.

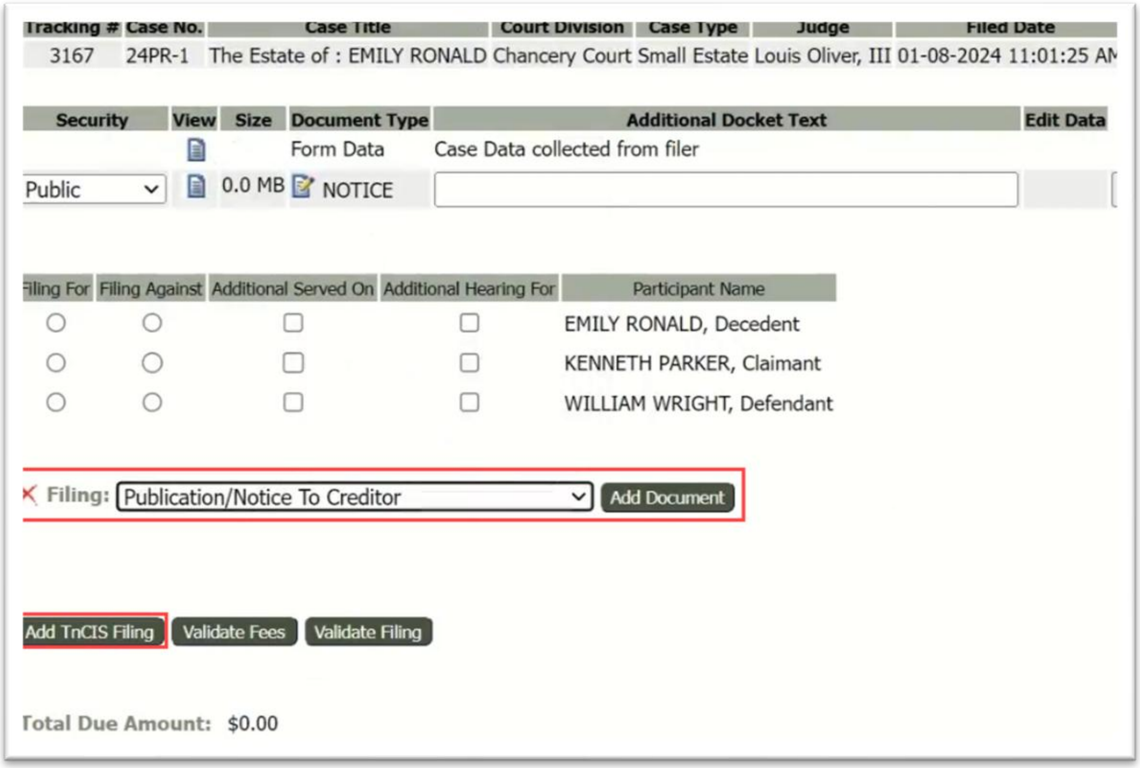


5) **Send** the documents to a **Queue** (optional).
6) **Process** the filing.
7) Return to the **Filings Report** page to check the status of the filing. It should end on **Receipt Issued**.
   a) Review the following entries in TnCIS to make sure the case was properly initiated:
      i) Party and Party Information
      ii) Estate-Like Data
      iii) Filings > Claims
      iv) Ruled Docket Entries
      v) Receipting
      vi) Filings

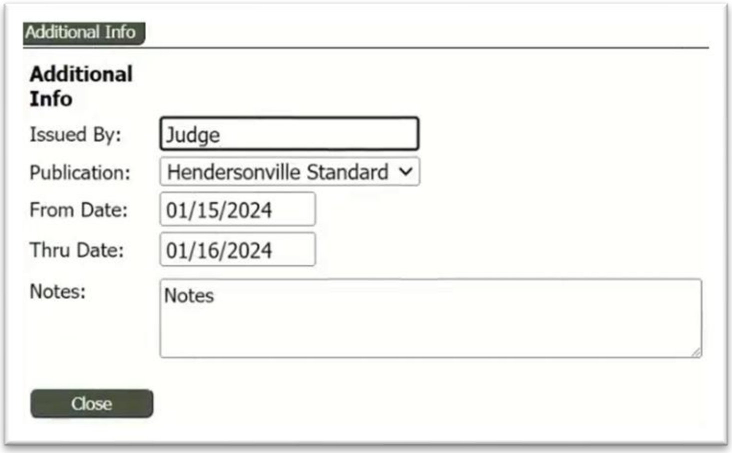
FILING A PUBLICATION ON AN ESTATE-LIKE CASE

(Reference Case Initiation steps 1-10 for assistance)

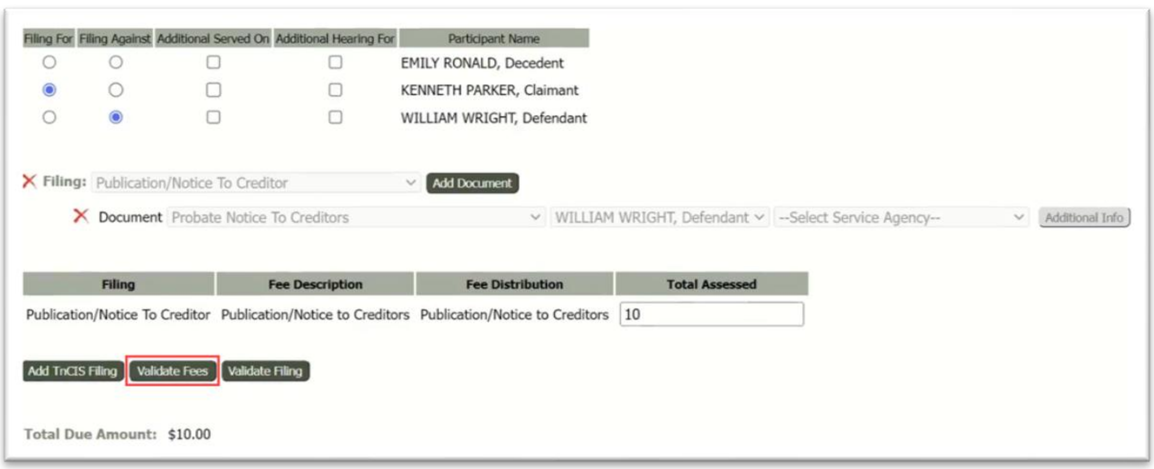
1) **Log into Court Review** with your **username & password**.
2) Click the **Approve Filings button** (or hover over the **Filings Tab** and select **Approve Filings** from the drop-down menu) to be directed to the **Filings Awaiting Approval** page. Click the *hyperlink tracking#* of the filing. You will be directed to the **Approve Filing** page**.**
3) Click **Add TnCIS Filing** and select who the filing is **For** and **Against**.



4) Click **Select Filing Type** and search through the drop-down menu to choose the applicable filing. The filings in this list are populated from TnCIS.
5) Select **Add Document** to specify which type of notice will be added. Designate the **Party Served**, the **Service Agency** (when applicable), and add **Additional Info**.



8) Click **Validate Fee** and verify the correct amount populated.
9) This *TnCIS Filing Type* triggers the percent fee configuration (varies per court). Add the amount required for the **Publication** fee in the **Total Assessed** text box.

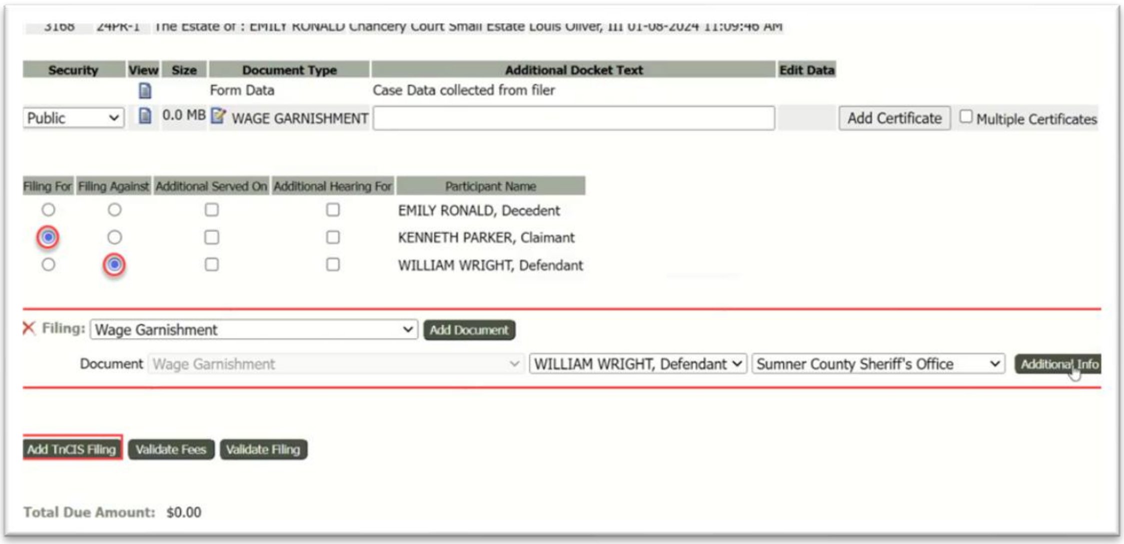


10) **Send** the documents to a **Queue** (optional).
11) **Process** the filing.
12) Return to the **Filings Report** page to check the status of the filing. It should end on **Receipt Issued**.
    a) Review the following entries in TnCIS to make sure the case data was properly stored:
        i) Party and Party Information
        ii) Estate-Like Data
        iii) Filings > Documents > Publications
        iv) Ruled Docket Entries
        v) Receipting

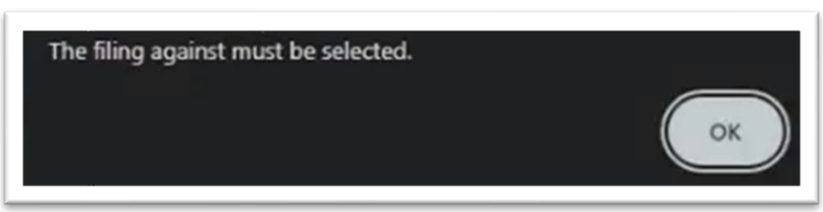
FILING A WAGE GARNISHMENT ON AN ESTATE-LIKE CASE

(Reference Case Initiation steps 1-10 for assistance)

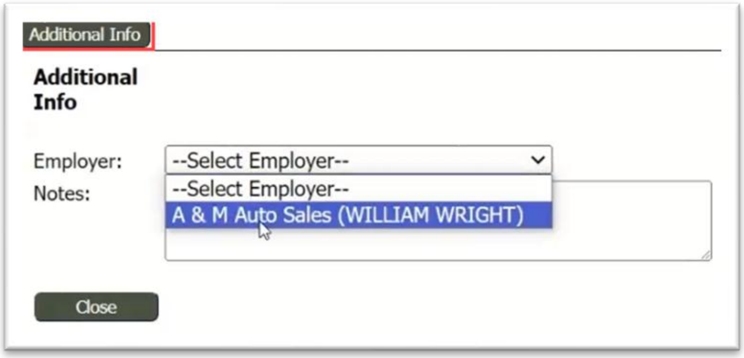
1) **Log into Court Review** with your **username & password**.
2) Click the **Approve Filings button** (or hover over the **Filings Tab** and select **Approve Filings** from the drop-down menu) to be directed to the **Filings Awaiting Approval** page. Click the *hyperlink tracking#* of the filing. You will be directed to the **Approve Filing** page**.**
3) Click **Add TnCIS Filing** and select who the filing is **For** and **Against**.



If you do not add the **Filing For** and/or **Filing Against** party, the system will prompt you to rectify the mistake before validating the fees.



4) Click **Select Filing Type** and search through the drop-down menu to choose **Wage Garnishment**. The filings in this list are populated from TnCIS.
5) Use the default **Document** to designate the **Party Served**, the **Service Agency**, and add **Additional Info**.

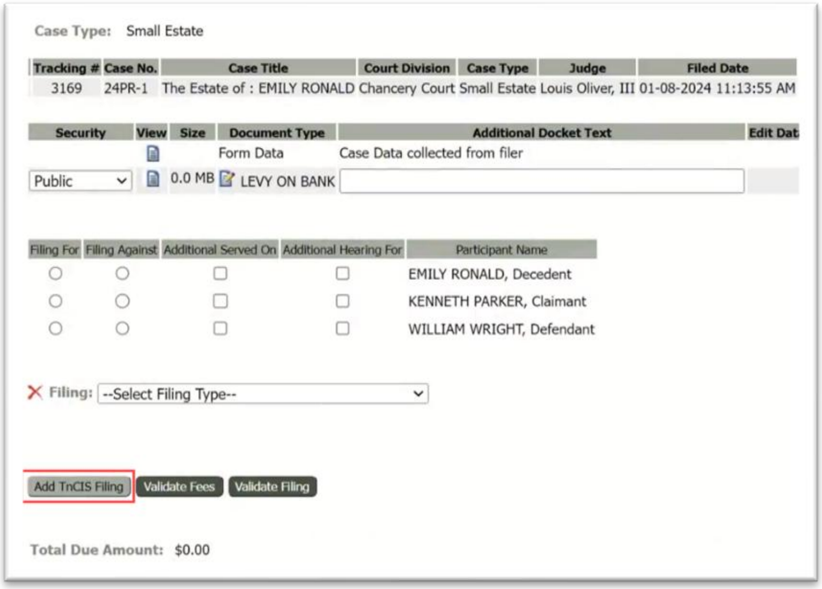


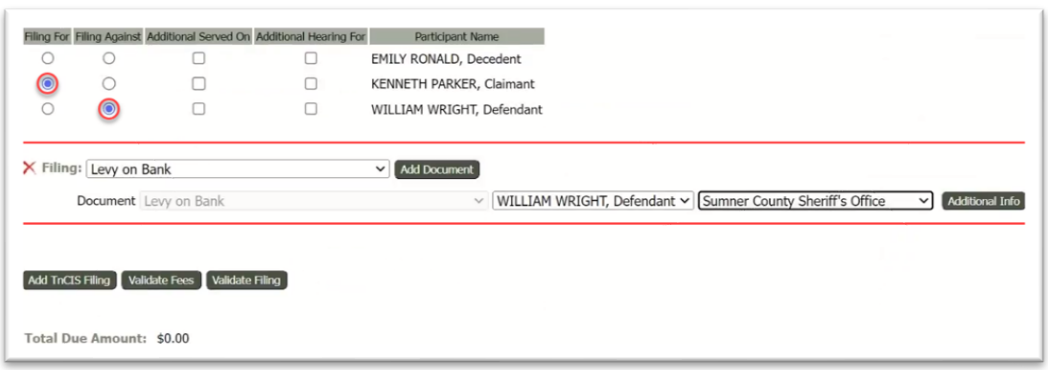
6) Click **Validate Fees** and verify the correct amount populated.
7) **Send** the documents to a **Queue** (optional).
8) **Process** the filing.
9) Return to the **Filings Report** page to check the status of the filing. It should end on **Receipt Issued**.
   a) Review the following entries in TnCIS to make sure the case was properly initiated:
      i) Party and Party Information
      ii) Estate-Like Data
      iii) Filings > Claims
      iv) Ruled Docket Entries
      v) Receipting

FILING A LEVY ON AN ESTATE-LIKE CASE

(Reference Case Initiation steps 1-10 for assistance)

1) **Log into Court Review** with your **username & password**.
2) Click the **Approve Filings button** (or hover over the **Filings Tab** and select **Approve Filings** from the drop-down menu) to be directed to the **Filings Awaiting Approval** page. Click the *hyperlink tracking#* of the filing. You will be directed to the **Approve Filing** page**.**
3) Click **Add TnCIS Filing** and select who the filing is **For** and **Against**.





10) Click **Select Filing Type** and search through the drop-down menu to choose **Levy on Bank**. The filings in this list are populated from TnCIS.
11) Use the default **Document** to designate the **Party Served**, the **Service Agency**, and add **Additional Info** (not required).

12) Click **Validate Fees** and verify the correct amount populated.
13) **Send** the documents to a **Queue** (optional).
14) **Process** the filing.
15) Return to the **Filings Report** page to check the status of the filing. It should end on **Receipt Issued**.
    a) Review the following entries in TnCIS to make sure the case was properly initiated:
        i) Party and Party Information
        ii) Estate-Like Data
        iii) Filings > Levy on Bank > Executions
        iv) Ruled Docket Entries
        v) Receipting

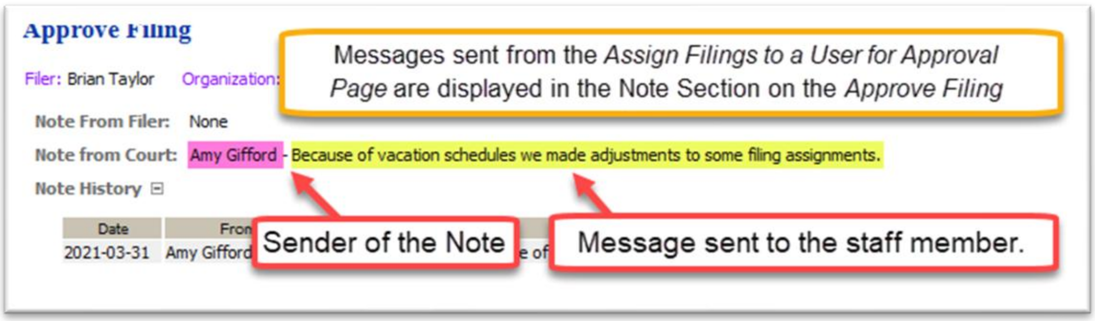
SUMMARY OF THE ASSIGN FILINGS TO A USER FOR APPROVAL PAGE

The **Assign Filings to a User for Approval** page is configured in the system role permissions for court clerks, judges, and admin users. This page displays a replica of the data table from the **Filings Awaiting Approval** page**.** The same features available in that data table are also available on this page:

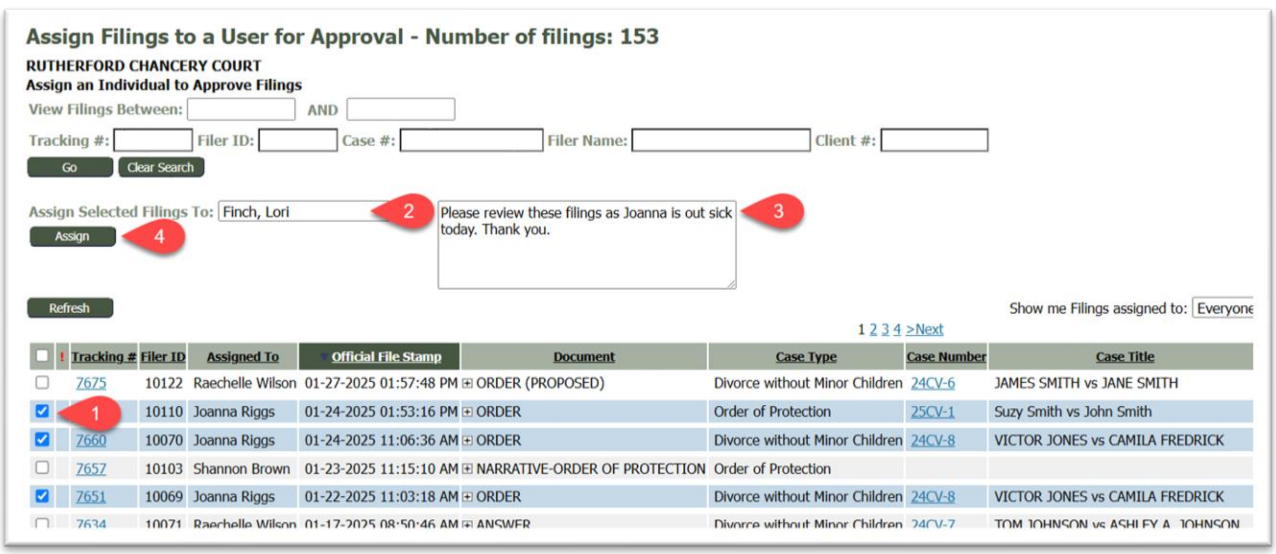
- Column headers with an ascending/descending sort feature that sorts alphabetically or numerically. Click the column header of choice to cause the table display to be organized according to the header selected. Clicking the column header a second time reverses the order of the displayed information.
- Clicking the hyperlinked **Tracking #** directs the user to the **Approve Filing** page.
- Submissions filed to an existing case show the case # in the **Case Number** column. A blank field indicates a case initiation.
- Clicking the **+** sign next to the document title inside the **Document** column will expand this section and show what documents are associated to the filing. It also provides a hyperlink, allowing the user to view the documents. Clicking the **–** sign will collapse this section.
- The default column is the **Official File Stamp** column, which means the most recent filings will be at the top. If you change the default sorting column to something else, leave the page, and return in the same time session, it will stay as the default setting. However, if you logout or the session terminates because of inactivity, when you log back in, the setting will refresh and the **Official File Stamp** column will once again resume as the default column header.
- On the right side of the page, just above the list of filings, there is the option to use the drop-down menu on the **Show me Filings Assigned To** field to filter the submissions displayed on the page to All submissions (everyone), unassigned submissions (no one), or submissions currently assigned to a specific user.

STEPS TO ASSIGN FILINGS TO A USER FOR APPROVAL

1. On the **Assign Filings to a User for Approval** page, mark one or more checkboxes next to the listed filings (click the marked checkbox again to deselect the checkbox or click the **Refresh** button to clear all checkboxes).
2. Click the down-arrow in the **Assign Selected Filings To** field to select the staff member who will receive the assignment for the designated filings.
3. Enter a message, if desired, in the **Note** field. Information recorded here will display in the **Note Section** on the **Approve Filing** page.

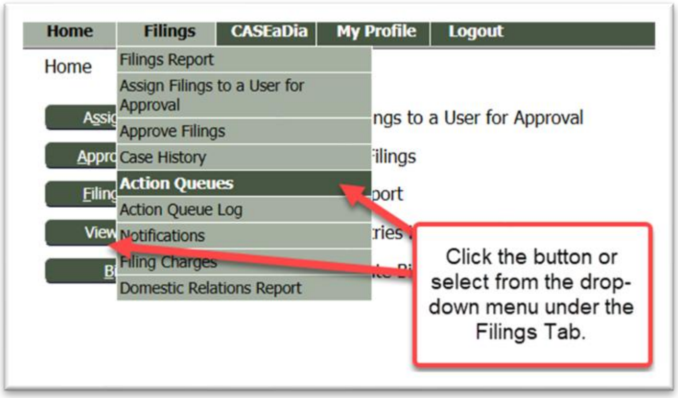


4. Click the **Assign** button to save the changes and refresh the **Assign Filings to a User for Approval** page.



OVERVIEW OF QUEUES AND QUEUE ENTRIES

- **Queues** are accessed by clicking the **View Queues** button on the **Home** page.
- **Queues** may also be accessed by hovering over the **Filings** tab and selecting **Action Queues** from the drop-down menu.



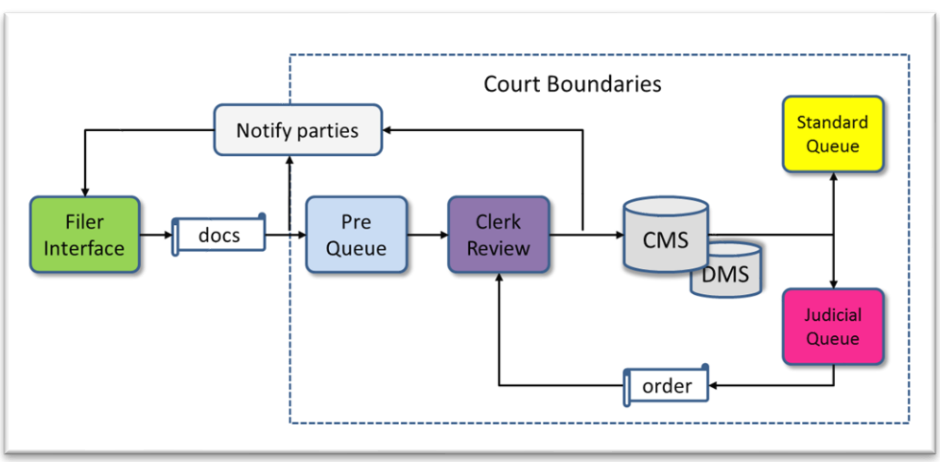
- The **Action Queue** log is accessed by selected it from the drop-down menu under the **Filings** tab. This page records all queue entries that have been completed. A user may search its records using the filtering fields to locate a specific queue entry.

The **Queue** feature of eFlex streamlines the procedural work-flow of the court. A simplistic explanation is that Queue Entries are like "sticky-notes" that act as reminders of actions that need to be taken with a filing. **Queues** are like multiple categories of in-baskets that hold similar "sticky-note" queue entry tasks, such as a **Motions Queue** which contains all motions submitted to the court or a **Proposed Order Queue** which contains all proposed orders submitted to the court.

Figure: Queue routing graphic.

1. *Inside the Filer Interface the documents are submitted to the court.*
2. *When applicable, the submission is directed to the Pre-Queue; otherwise, it goes to the Clerk Review Queue.*
3. *Once approved in Clerk Review, the filing is recorded in the CMS (Case Management System) and DMS (Document Management*
4. *System). When applicable, after approval the documents are also routed to either a Standard Queue or Judicial Queue for additional action.*
5. *If it goes to a Standard Queue, once the task is completed, the queue entry is deleted by the system.*
6. *If it goes to a Judicial Queue, an Order will result as an internal submission by the court and this document is then routed to the Clerk Review Queue for processing and recording to the CMS and DMS.*

Note: After the Clerk Review Queue, notification goes out to the parties. They can then choose to submit additional documents through the Filer Interface.



There are four types of queues configured in the system**:** The **Pre-Queue**, **Clerk Review Queue**, **Standard Queue** and **Judicial Queue**.

1. The **Pre-Queue** is a station that stops a filing before it comes to the **Approve Filings** page. Various reasons may contribute to the necessity of setting up a pre-queue. From the pre-queue a judicial officer has the option to either reject the filing back to the filer or approve it and send it forward to the **Approve Filings** page**.** An example is the document type **Indigency Affidavit (Proposed)**, which routes to a pre-queue so that the judge may approve or reject the document to waive fees for the case. The pre-queue is the most time-sensitive queue. The filing cannot proceed to be approved or rejected until action is taken in the pre-queue. If one document in the submission is flagged to stop in the pre-queue, the entire submission stops until pre-queue action is completed.
2. The **Clerk Review Queue** is where all submissions to the court must flow in ordered to be processed, accepted, stamped, and recorded in the CMS (Case Management System) and Alpine cache. Sometimes the clerk approval process is not looked upon as a queue; however, it does fit the definition of being a station made up of clerk tasks that need to happen to process all filings to the court. This queue is not accessed by clicking the **View Queue** button on the **Home** page, rather, these main pages have their own buttons: **Filings Report** and **Approve Filings.** These are discussed in detail in the documentation above. Some document types may be configured for automatic approval and therefore do not show up in the listings on the **Awaiting Approval** page. However, they do show up on the **Filings Report** page.
3. The **Standard Queue,** in essence, is a "To Do List" of actions required to complete a filing. The action is usually procedural and is handled outside of the eFlex system, such as printing and mailing documents, entering CMS data that was not handled by eFlex, or preparing a Writ and sending it to the sheriff's office. Once the clerk has completed the action required, they mark it as done, and the eFlex system automatically deletes the queue entry.
4. The **Judicial Queue** is designed to allow judicial officers to upload and submit their rulings, decisions, or orders as internally filed submissions from the court in response to documents submitted by a filer or because of a hearing that was held, with the capability of adding their e-signature to the documents. An important concept to remember with judicial queues is that the filer's submission has already been completely processed by eFlex and the judicial queue entry is simple referencing the filer's submitted documents.

NOTES REGARDING QUEUES

- A filing that has been routed to the **Standard** and **Judicial Queues** has already been accepted by the court, time-stamped, approved, and docketed to the case, except for **Proposed Orders**. Although the proposed order is approved by the clerk on the **Approve Filings** page, the actual document is not docketed to the CMS or DMS. Only the Order that is created in response to the proposed order will be docketed.
- Queue entries can be routed manually to a queue from the **Approve Filing** page or auto-routed through system configuration (see page 25).
- The option is available on the **Approve Filing** page to assign queue entries, whether they were added manually or auto-configured for a filing. Assignments and reassignments may also be made inside the queues on the **My Queue Entries** page and the **Action Details** page (see page 25).

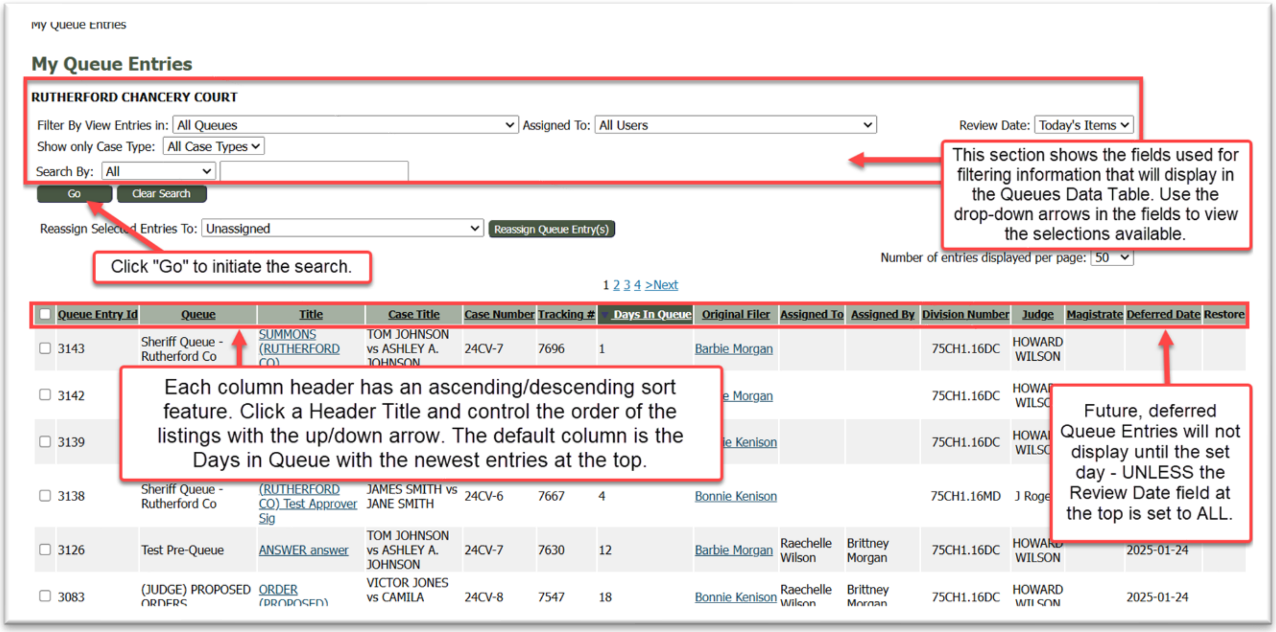
- Queues may be accessed through the Filer Interface as well as the Court Interface, based on the role of the user and if they have access to queues. In these instances, the **View Queues** button will display on the **Home** page of the Filer Interface.
- **Gatekeepers -** Judges are the primary role 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 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 or her signature.

  > **Note:** If a judge has added a gatekeeper, by default the judge will not be able to view any filings routed to his queues until the gatekeeper has reassigned the filings to the judge. However, a judge can change the **Assigned to** field default setting on the **My Queue Entries** page so he can view queue entries assigned to **ALL**. This will allow the judge to view all entries he has permissions or division IDs to view. If the judge is interested in a specific case, he can also filter for that case and view the queue entries.

- **Division Filtering -** Division Filtering is configuration set to divide workflow for the court staff based on a judge and the judge's unique identifier. If the judge has an administrative assistant or specific court staff that do work for him, the judge's unique ID may be added to the Profile of the court staff so that they have system permissions to see the judge's queue entries. Staff may have the IDs of multiple judges in their profile. This ID number is listed under the column **Division Number** on the **My Queue Entries** page.

QUEUES: MY QUEUE ENTRIES PAGE

The user is directed to the **My Queue Entries** page when they click the **View Queues** button on the **Home** page. A data table displays the queue entries requiring attention. To begin work on an individual queue entry, the judicial officer or court staff member clicks the hyperlink in the **Title** column for the queue assigned to them in **The Assigned** column. This directs the user to the **Action Details** page.



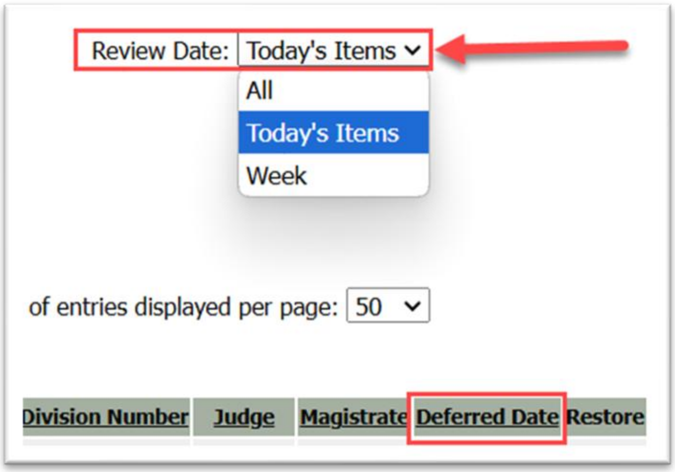
MY QUEUE ENTRIES PAGE: FILTERS AT THE TOP

Several drop-down search fields at the top of the page allow the user to filter which queue entries will display on the page. The Search fields can be used in conjunction with one another. One may choose to find 1) all the **Unassigned** queue entries and filter for those 2) inside the **Order Queue**. After clicking **Go**, the data table will respond by displaying information that fits the designated parameters. To clear all search fields and refresh the page, click the **Clear Search** button**.**

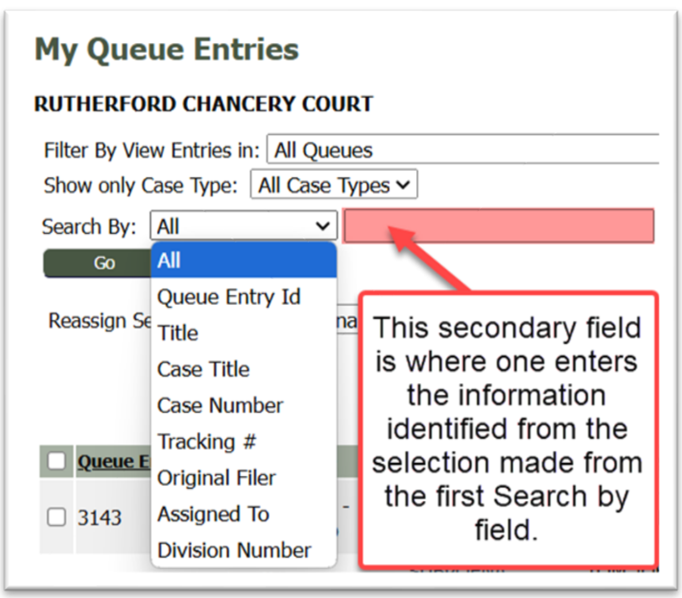
- The **Filter by View Entries in** field has a drop-down menu that displays the queues associated to the role of the user. Clerical staff vs Judicial staff have role permissions set to different queues.

- The **Assigned to** field has a listing of court personnel who can be assigned to queue entry tasks specific to the individual queues. It also has a filter for **All Users** and **Unassigned**. When a user first logs into the system and comes to the **My Queue Entries** page, the default view setting for the **Assigned to** field will be their own name. To see all the active queue entries in their role-associated queues, they need to change the filter to **All**. This will then become their new default setting for the session. If they leave the page and return in the same time session, it will stay as the default setting. However, if they log out or the session terminates because of inactivity, when they log back in, the setting will refresh and the **Assigned to** field will once again display their name as the default setting.

- The **Review Date** field has reference to the **Deferred Date** feature that allows the user to defer action on a queue entry until a future date. This is used when a filing is submitted that requires action, but a certain period must pass by first to allow the opposing party to file a response. Setting a deferred date will also delay showing the queue entry inside the data table until that time has arrived. Action can then resume on the case. The **Review Date** field on the top right will default to **Today's Items**. Changing the setting to **All** will also display in the data table all future **Deferred Date** queue entries**.**



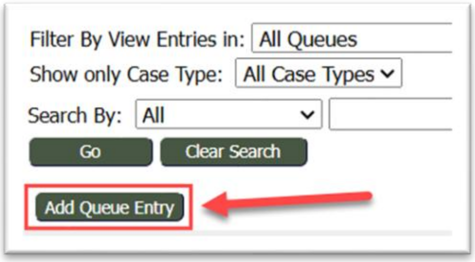
- The two **Search By** fields work together. In the left field, click the down arrow to select a column category that you wish to filter by. In the second field, identify the name or number you are searching for in relation to the left field's selection.



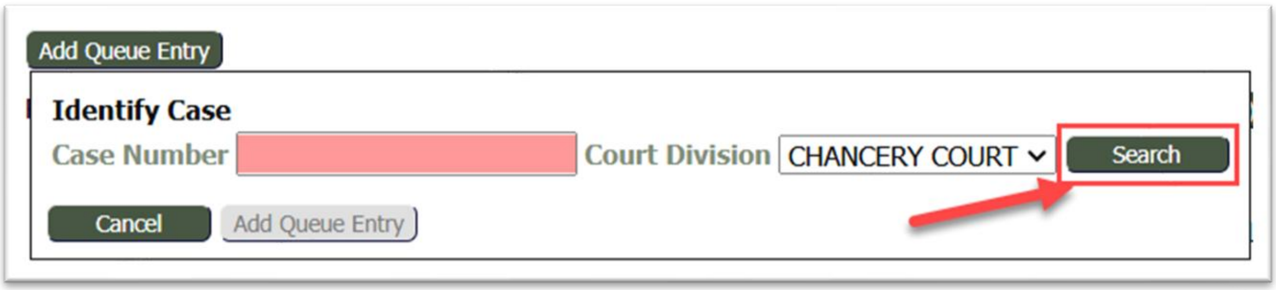
MY QUEUE ENTRIES PAGE: Add Queue Entry Button

Sometimes it is necessary to create a new queue entry to provide a **Judicial Action Details** page for a judge to sign and submit an order, ruling, or decision. The **Add Queue Entry** button is used for this purpose. It is only applicable for **Judicial Queues**. For some document types, such as **Proposed Orders**, these steps are not necessary because these queue entries are already sitting in a **Judicial Queue** wherein the judge can sign and submit an Order.

1. On the **My Queue Entries** page, click the button **Add Queue** entry.



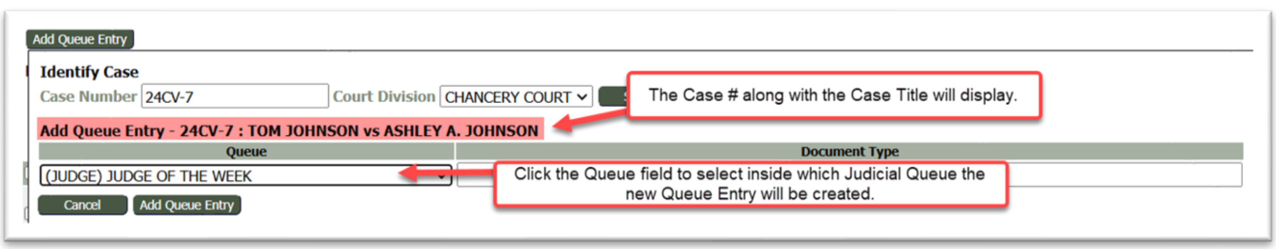
2. In the pop-up box, type the case number in the provided field and click **Search**.



3. The box will expand and display the **Title** of the case along with additional fields.

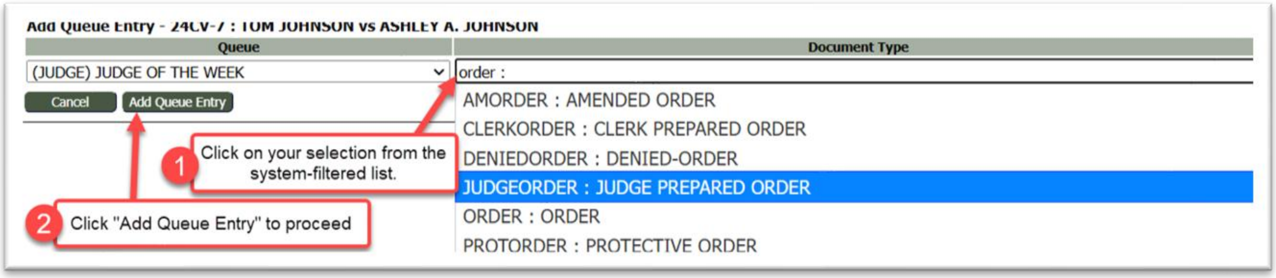
   Note: Alternately, if another **Queue Entry** is presently listed in the **Queue Entries** table for the same case for which you are adding a new queue entry, (for example, the **Motion Queue** entry needs an Order response) click the icon in its **Queue Entry ID** column and the system will create a new queue entry, bypassing steps 1, 2, and 3 listed above, to bring the user to the point of proceeding with step 4 listed below.

4. Click the down-arrow in the **Queue** field to expose the Judicial Queue list. Select the appropriate queue for your filing.



5. Inside the **Document Type field,** begin typing the intended document type you wish to file**,** either by name or code, and the system will display a filtered drop-down list based on what is entered.

6. Select the desired document type and click the button **Add Queue Entry**.



7. Click **OK** when a pop-up box asks permission to continue.
8. An **Action Details** box will display. Click the **Browse** button to select the intended document from your computer. When the document title displays next to the **Browse** button, click the button **Add Document.**

9. This directs the user to the **Action Details** page**.**
10. Click the **View** Icon inside the **New Docket Entry** section to ensure that the correct document was uploaded.
11. Select the appropriate signature from the **My Signature** column (many judges have just one signature).
12. Mark the radio button **Sign and Submit Document**.
13. Click the button **Sign and Submit**.
    a. Depending on the document type configuration, this may add the appended eFlex signature page to the order or take the user to the eSignature Application to place a signature on the order's designated judge signature line. Please review the eSignature signing process section for more details.

MY QUEUE ENTRIES PAGE: QUEUES DATA TABLE

- Column headers in the data table have an ascending/descending sort feature that sorts alphabetically or numerically. Click the column header of choice to cause the table display to be organized according to the header selected. Clicking the column header a second time reverses the order of the displayed information.
- The default column for the data table is the **Days in Queue** column, which means the most recent filings will be at the top. This is recognized by the block color difference of the column header that is controlling the data display. If another column is selected for filtering, this will become the new default setting for the session. If you leave the page and return in the same time session, it will stay as the default setting. However, if you

logout or the session terminates because of inactivity, when you log back in, the setting will refresh and the **Days in Queue** column will once again resume as the default column header

- **The Queue Entry ID Column**– This unique number is assigned to identify and track queue entries within the queue system. It is different than the number in the **Tracking #** column, which is the unique number assigned to identify and track filings that come into Court Review.
- **The Queue**– This identifies in which queue the queue entry is currently stationed.
- **The Title Column**– This document type title identifies the filing and is also the hyperlink through which the user is directed to the **Action Details** page to work on the queue entry.
- **The Case Title Column**– The Case Title not only identifies the case; it can also be used for searching. In the **Search By** field, the user may select **Case Title** from the drop-down menu and in the field to its right type in any identifying word from the case title. Click **Go** to initiate the search.
- **The Case Number Column** – The Case Number.
- **The Tracking # Column** – The Tracking Number.
- **Days In Queue** – This important number allows any user of the queue system to see how long a queue entry has been sitting in the queues. It is recommended that someone be assigned to regularly check the **Days in Queue** column especially for unassigned queue entries.
- **Original Filer** – The filer who initiated the filing.
- **The Assigned To Column** - This identifies who is tasked with completing the queue entry. If this individual has set their profile checkboxes to **receive notifications when a queue entry is assigned to them**, they will have received an email notifying them that the queue entry was there for them.
- When viewing the **Queues** data table, if individuals know they are responsible for certain tasks identified by the unassigned queue entries, they may mark the multiple checkboxes on the lines of the queue entries, scroll to the bottom of the page, and click the button **Assign Task to Myself.** Their name will then display in the column **Assigned to** on the lines of each of the queue entries.
- **The Assigned By Column** – This column displays who last assigned or reassigned the queue entry.
- If a supervisor is tasked with assigning other individuals to the queue entries, follow these steps:
    a) On the **My Queue Entries** page, click the hyperlinked document title in the **Title** column to be directed to the **Action Details** page.

b) At the bottom of the **Action Details** page, click the down-arrow in the **Reassign Queue** field (only if the queue needs to be changed from its current queue) and select from the list the new Queue for the task.
c) Click the down arrow in the **To** field and select the name of the intended individual for the task.
d) Click the **Reassign** button.
e) The queue entry will now display in the data table with the assigned person's name displaying in the **Assigned To** column.

- It is recommended that a "watchdog" be assigned to oversee the unassigned queue entries to ensure that no tasks slip between the cracks unnoticed.
- **The Division Number Column** – This column references the Division Filtering feature that assigns court and/or judicial staff to see only the queue entries of the judge(s) whose unique ID is listed on their personal profile. This ID number is listed in this column to associate the queue entry to the judge. This feature is available in fully integrated installations of eFlex.
- **The Judge Column** – The current judge assigned to the case.
- **The Magistrate Column -** The current magistrate assigned to the case, if applicable.
- **The Deferred Date Column** – The **Deferred Date** feature allows the user to defer action on a queue entry until a future date. This is used when a filing is submitted that requires action, but a certain period must first pass to allow the opposing party to file a response. Setting a deferred date will also delay showing the queue entry inside the data table until that time has arrived. Action can then resume on the case. If the **Review Date** field on the top right is set to **All**, then future **Deferred Date** queue entries will also show in the **Queues** data table**.** If the user chooses to set a deferred date on a queue entry, they must do this on the Action Details page.

  a) Click the hyperlinked title on the queue entry's line on the **My Queue Entries** page.
  b) This directs them to the **Action Details** page.
  c) Scroll to the bottom of the page and click inside the **Date Deferred** field.
  d) A pop-up calendar will display and a date may be selected.
  e) Click the **Reassign** button to reassign a new date to the queue entry and the screen will return the user to the **My Queue Entries** page.
- **The Restore Column** – This column will display a **Restore** button when an order is pending signature in the eSignature application.

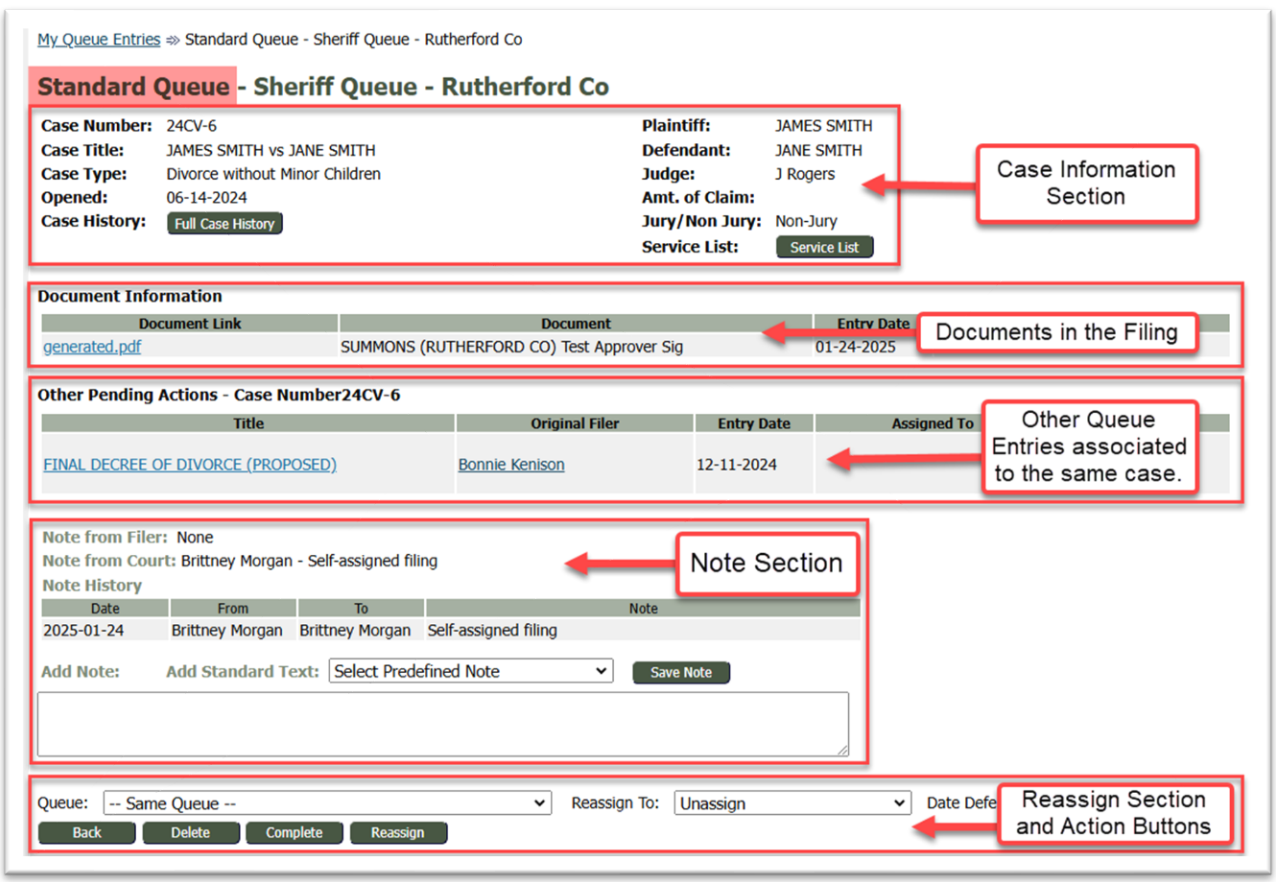
QUEUES: ACTION DETAILS PAGE

The **Action Details** page, which is accessed by clicking the hyperlinked document title from the **My Queue Entries** page, allows court personal to view case information on the selected queue entry, documents associated to the queue task, other pending actions in other queues associated to the same case, and any notes from the filer or court staff members regarding the filing. There are two types of **Action Details** pages: **Standard Queue Action Details** pages and **Judicial Queues Action Details** pages.

THE STANDARD ACTION DETAILS PAGE

The **Standard Action Details** page is used primarily by court staff when follow-up tasks are required, relative to a filing; such actions can include mailing documents or entering CMS data that was not handled by eFlex. Queue entries from a **Standard Queue** page have no continued interaction with the interface once the required task is done.

The appearance of the **Standard Queue Action Details** page differs from that of a **Judicial Queue**. There is no **New Docket Entry Section**; consequently, there is no **Sign and Submit Document** capability. The user selects the **Complete** button, like placing a checkmark beside a completed item on a "to do" list, and the queue entry is automatically removed from the **My Queue Entries** page and tracked on the **Action Queue Log** page as a completed entry. There is also the option to either reassign the queue entry to another court staff member or delete the queue entry. If deleted, the label **No Action Taken** will display on the **Action Queue Log** page.

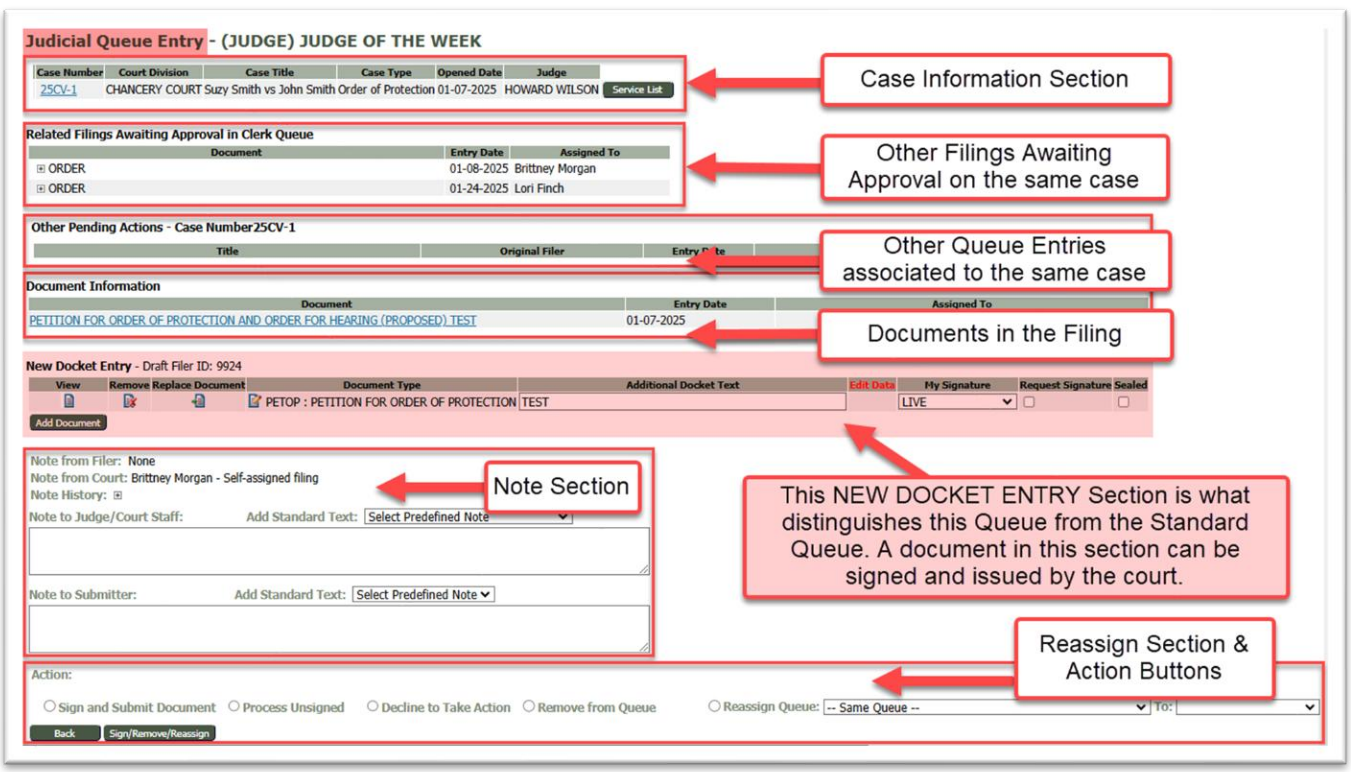


THE JUDICIAL ACTION DETAILS PAGE

The **Judicial Action Details** page is used primarily by Judges and administrative assistants for reviewing case information and signing and submitting internal filings. Clerks may be reassigned a Judicial queue entry from a court officer when a task is requested of them, such as proofreading. These queue entries can then be reassigned back to the judge for signature and submission.

The most significant difference between a **Standard Queue Action Details** page and a **Judicial Queue Action Details** page is the presence of the **New Docket Entry section.** This section has functionality which allows a Judicial Officer to electronically sign and eFile a "new docket entry" to the case, thus the name of the section. Orders signed and submitted from this page are directed to the **Approve Filings** page to be time-stamped, approved, and docketed to the case.

If the workflow of the court designates an administrative assistant as the one who prepares the Order, as directed by the Judge, the Judge may receive the initial queue entry assignment to review all the information, then reassign the queue entry to the administrative assistant with instructions in the **Note** section for the assistant to create and upload the requested document. Once done, the assistant can either reassign the queue entry back to the judge for signature with a note entered in the **Note** section with comments back to the judge, or some courts choose to have the administrative assistant electronically sign on the judge's behalf.



1. **Case Information Section –** This section gives details about the case. Clicking the hyperlinked **Case Number** will open a new tab in the browser and display the case history

(integrated courts only). Some courts also have the **Service List** button which will open a new browser tab and show the **Certificate of Service** so that staff will know which parties on the case will be served electronically because they have eFiling accounts and who will be served in the traditional manner because they do not have eFiling accounts. For court-initiated filings, this information is needed so staff will know which case participants will need to have documents printed and mailed out.

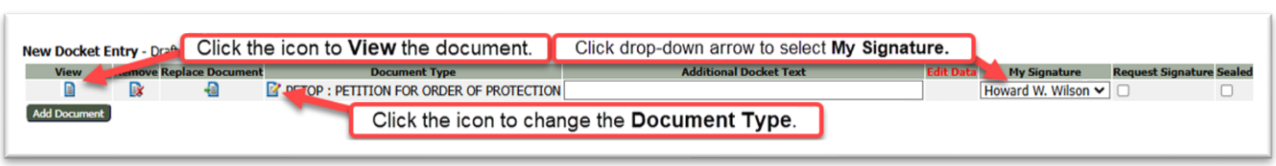
2. **Related Filings Awaiting Approval in Clerk Queue –** This section lists documents associated to the same case number that are currently sitting in **Filings Awaiting Approval** for a clerk to review, approve, or reject.

3. **Other Pending Actions Section –** This section lists documents associated to the same case number that are currently sitting in other queues awaiting action. Clicking any of these hyperlinked document titles will direct the user away from the current queue entry and lead them to the other listed queue entry. This is especially helpful if a court chooses to set the Motions Queue as a **Standard Queue** instead of a **Judicial Queue**. In this instance, if both a Motion and a Proposed Order are submitted together in a filing, and if the clerk is in the **Motions Queue**, they can click the **Proposed Order** title in the **Other Pending Action** section, and be directed to the **Judicial Queue Action Details** page where they will have the ability to issue an order through the **New Docket Entry** section.

4. **Document Information Section –** This section lists the documents that were submitted together in the filing. Clicking the hyperlinked title of the document will open a new tab in the browser and display the time-stamped, approved, and docketed document (note: As configured by the system, Proposed Orders will display but will not be stamped nor stored in the CMS or DMS).

5. **New Docket Entry Section -**

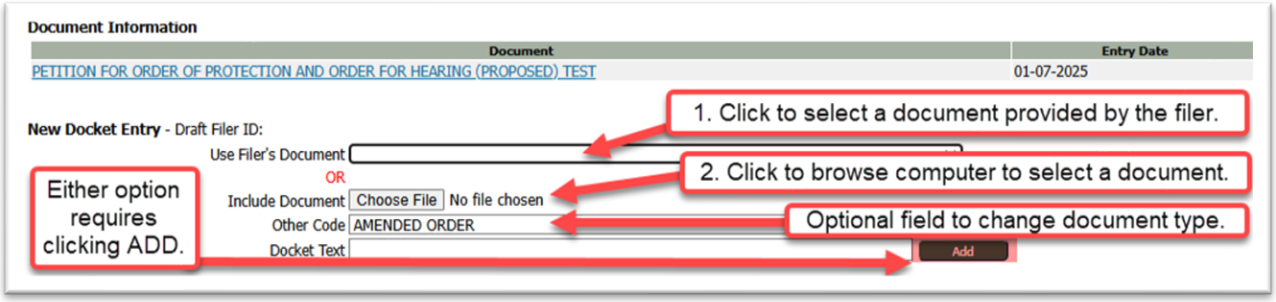
   This section defines the difference between a **Judicial Queue** and a **Standard Queue**. It allows the Judicial officer to: view, remove, or replace a document; change the document type; add additional docket text; request or add a signature; and ultimately eFile a "New Docket Entry" to the case, thus the name of the section.



   a) **View Icon** – Clicking this icon allows the user to open the filer's original submitted document that requires action. To view all the documents within the same filing, refer to the **Document Information** section above and click the individual hyperlinked document titles.

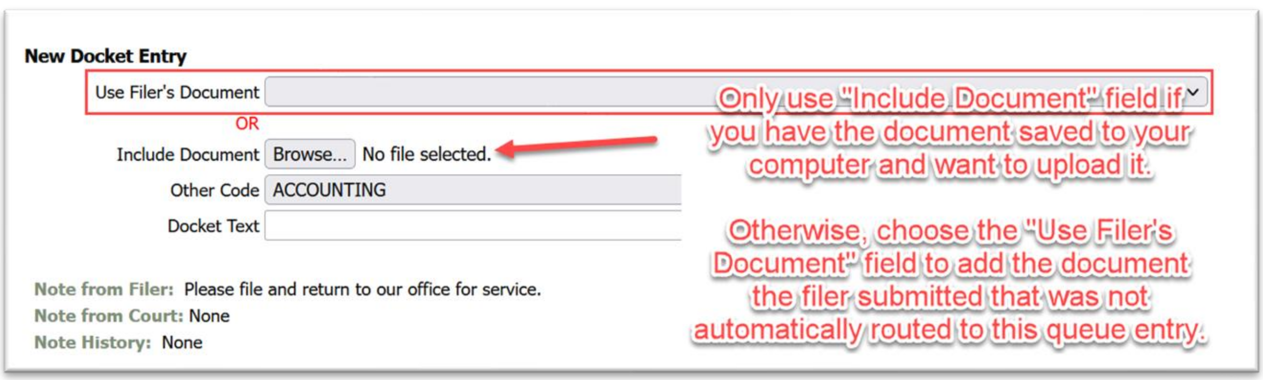
   b) **Remove Icon** – Clicking this icon will remove the document and display a new section on the page asking to use the filer's document or browse your computer to replace it.

Both options require clicking the **Add** button to continue. The **Remove** icon is rarely used compared to the **Replace Document** icon.

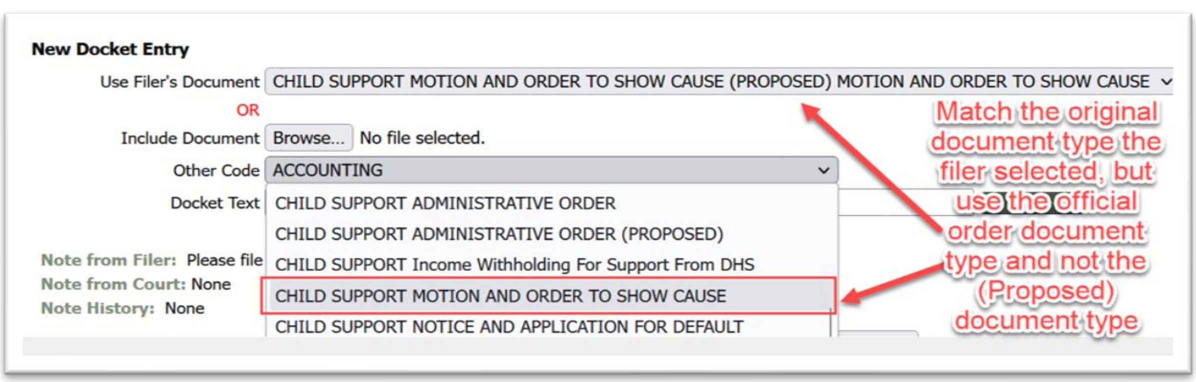


Note: The fields in the above screenshot may also appear if the document routed to the judicial queue entry was manually added at the time of approval. The system does not know which document in the submission to sign, so the clerk or judge has to designate the desired document the filer submitted for signature, even if there is only one to choose from.

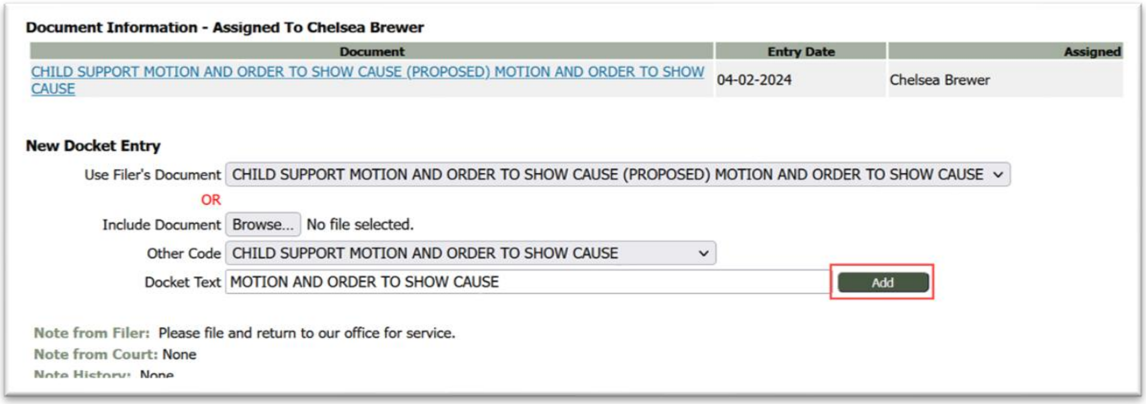
1. Select the appropriate document from the **Use Filer's Document** field.



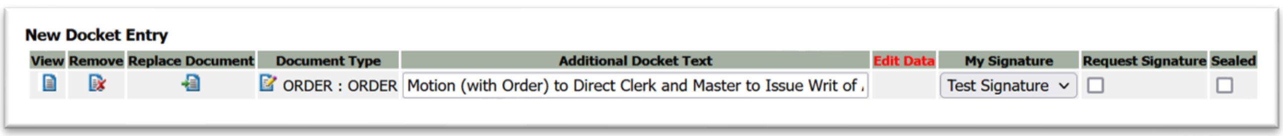
2. Change the **Other Code** field to the correct document type. As this field is alphabetized, it will begin with the first available document type that begins with the letter "A."



3. Add any **Docket Text** the original filer included for additional context.



4. Click **Add**.
5. The **New Docket Entry** filed will appear as expected, and the document can be replaced and signed if desired.



Configuration adjustment steps to keep this phenomenon from happening on documents that 100% of the time need to be routed to a judicial queue for signature:

- When this **New Docket Entry** field on a queue entry appears without the document, it means the document type is not set to automatically route to this "Proposed Orders" queue. You will need to adjust the current configuration for this queue under "Court Configuration."

c) **Replace Document Icon** – This icon is used most often when a judge needs to upload their prepared document to be e-signed and submitted. Clicking this icon will open a page allowing the user to browse their computer to select the document. Once the document is located and listed next to the gray **Choose File** or **Browse** button, click the button **Replace Document** to be directed back to the **Action Details** page. It is a recommended practice to click the icon in the **View** column to ensure that the correct document was selected and uploaded (the document will open in a new browser tab). Click out of the document to return to the **Action Details Page** to proceed with the queue task.

d) **Document Type** edit icon – Clicking this pencil edit icon will display a pop-up box with a type-ahead field allowing the user to change the document type when necessary. Click the **Save** button to continue.

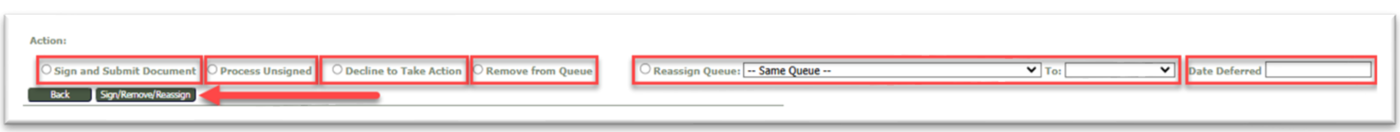
e) **Additional Text** field – Entering text in this optional field will display the text next to the document type in the **Case History** to give greater detail or clarity.

f) **Edit Data** field – The pencil and paper icon only appears in this column if a webform is associated to the document type being processed.

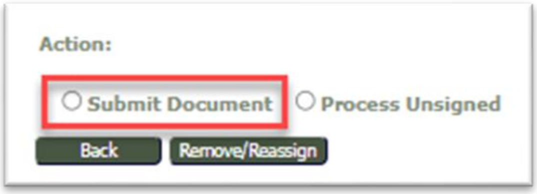
g) **The My Signature** field will display a drop-down listing of signatures created by the judge from their **Profile** page to be used for various purposes. Some judges opt to have only one signature. Some judges opt to have their signature uploaded to their assistant's profile page for those occasions when the judge assigns the assistant to e-sign on their behalf.

h) The **Request Signature** checkbox is used in conjunction with the **Mass Signature Functionality** which allows judges the option to quickly sign multiple judicial queue entries all from one page. When the gatekeeper marks this box, it sends the queue entry to the Judge's **Signature Queue**. (see page X to see **Mass Signature Functionality**)

6. **Sealed** – This checkbox flags the document as sealed. In a non-integrated system, the clerk will need to manually mark this document as sealed once added to the CMS.
7. **Note Section** – This section displays notes from other sources as well as provides a note field for the user to make assignments or comments to other court staff. It may be necessary to click the **+** sign next to **Note History** to expand the table of notes.
8. **Action Section** – This section at the bottom of the page provides radio button selections to indicate what action is to be taken on the queue entry.
   - **Sign and Submit Document**
   - **Process Unsigned**
   - **Decline to Take Action**
   - **Remove from Queue**
   - **Reassign**, along with the fields **Reassign Queue**, **To**, and **Date Deferred** (when applicable).

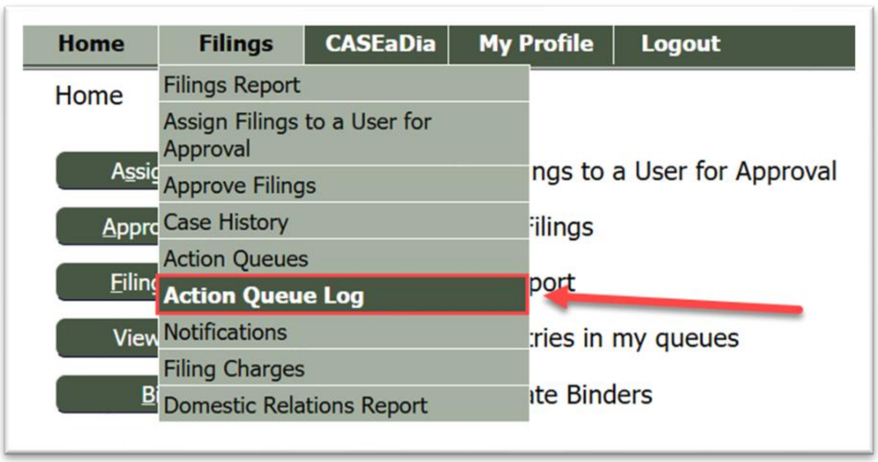


Note: The **Action Section** will state **Submit Document** instead of **Sign and Submit Document** if the document is not configured to be signed.

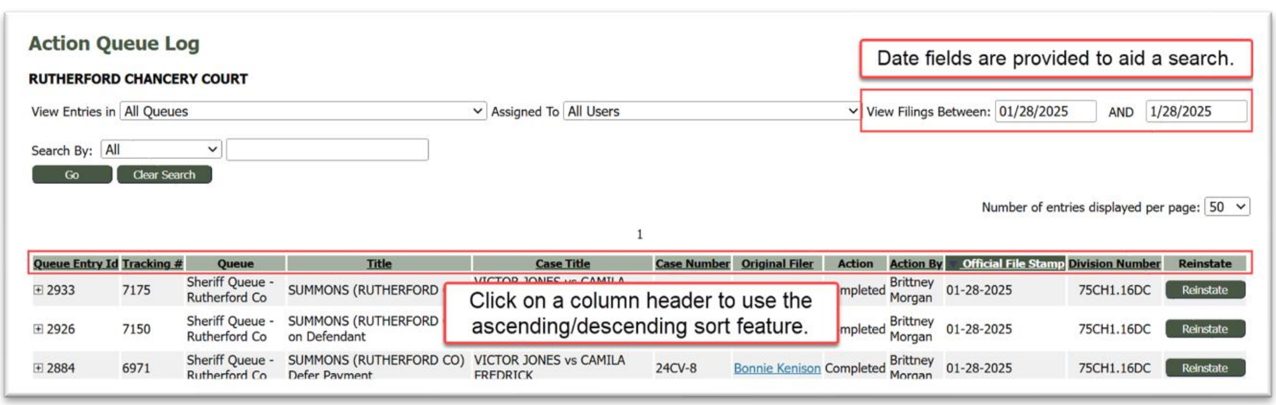


QUEUES – THE ACTION QUEUE LOG

All completed queue entries are recorded inside the **My Queue Entries Action Queue Log**. This page is accessed by hovering over the **Filings** tab and selecting **Action Queue Log** from the drop-down menu.



This page is like the **My Queue Entries** page with a queues data table. There are search fields provided at the top of the page to facilitate locating a group of queue entries or a specific queue entry. There are no hyperlinks to direct the user elsewhere; it is just a table of information of completed tasks.

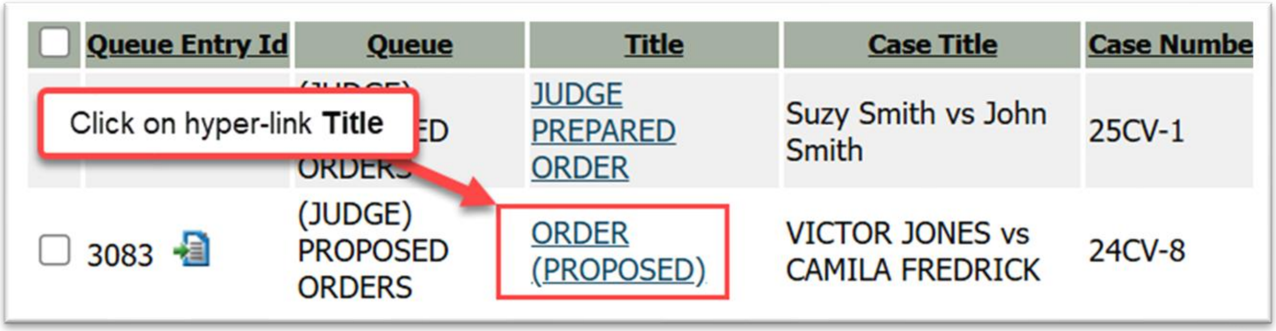


QUEUES – WORKING WITH PROPOSED ORDERS

- **Proposed Orders** are configured so that they will not be time stamped nor docketed in the CMS or DMS. Only the Order that is created in response to the proposed order will be docketed.

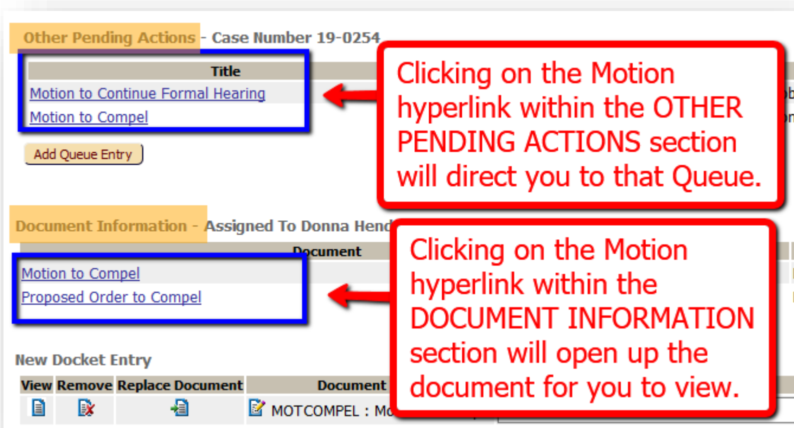
- **Proposed Orders** are submitted to the court as Word document files as opposed to pdf files. In this way, the judge can edit them as needed to create the order.

1. On the **My Queue Entries** page, click the hyperlink title **Proposed Order**.



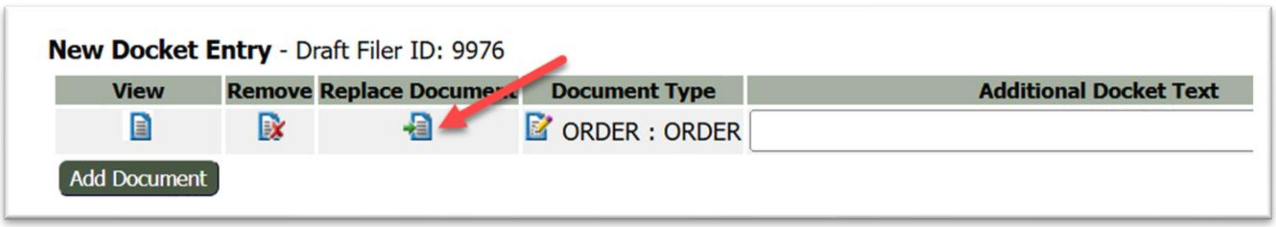
2. On the **Action Details** page, view the **Proposed Order** document by clicking the **View** icon in the **New Docket Entry** section. It may also be opened and read by clicking on its hyperlinked title in the **Document Information** section.

3. The **Document Information** section contains the documents that were filed together in the submission. They each can be opened and read by clicking on their hyperlinked title in this section. If there is a **Motion** that accompanies the Proposed Order, it too can be viewed by clicking on its hyperlinked title. If the Motion has been configured to auto-route to a queue from the **Approve Filings** page, it will also display as a listing in the **Other Pending Action** section, indicating that a pending task is awaiting attention for the Motion. Clicking on its hyperlinked title in this section will take the user to that queue. To return to the **Proposed Order** queue from that queue page, the user would click on the hyperlinked title of the **Proposed Order** in the **Other Pending Action** section.



Note: In the **New Docket Entry** section under the **Document Type** column, the system will automatically change the document type **Proposed Order** to be that of an **Order**. After the Judge signs and submits the order, the system will also convert the word document to a pdf format.

4. If the **Proposed Order** from the filer is agreeable to you with **No** needed changes:
    a) Select your name in the **My Signature** column.
    b) Proceed to the **Action** section at the bottom of the page and click the radio button **Sign and Submit Document**. Click the button **Sign and Submit**.
5. If the Proposed Order needs to be edited before you agree to sign it as an Order:
    a) Click the **View** icon and make the necessary changes. Save the document to your computer.
    b) In the **New Docket Entry** section, click the **Replace Document** icon. This will display a pop-up box allowing you to browse your computer to select the revised document. Click the button **Replace Document** inside the pop-up box. The system will accept the new document and direct you back to the **Action Details** page to proceed with the order.



    c) It is a recommended practice to click the **View** icon one more time to ensure that the correct document was uploaded.
    d) Select your name in the **My Signature** column.
    e) Proceed to the **Action** section at the bottom of the page and click the radio button **Sign and Submit Document**. Click the button **Sign and Submit**.
        i. If using the **eSignature** application to sign documents, the user will be directed to the eSignature log in page to complete the signing process.

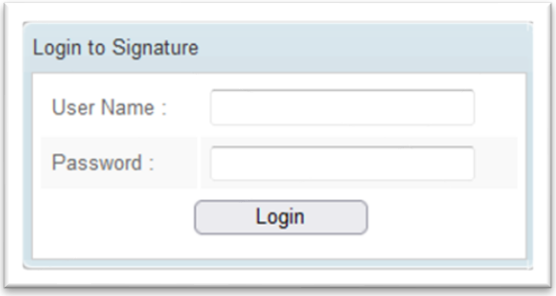
QUEUES – eSignature Application

The Tennessee TnCIS eFiling system uses eSignature to sign court documents electronically. Signatures are placed at a specific location on the document. The document may also require signatures from users that do not have an eFlex account. Those users will then be able to create an independent eSignature account with the help of the eFiling Administrator.

The eSignature application functions much like signing a document with a signature pad. You first define the signer(s), open the document using the eSignature application via eFlex, and finally login and complete the signature process.

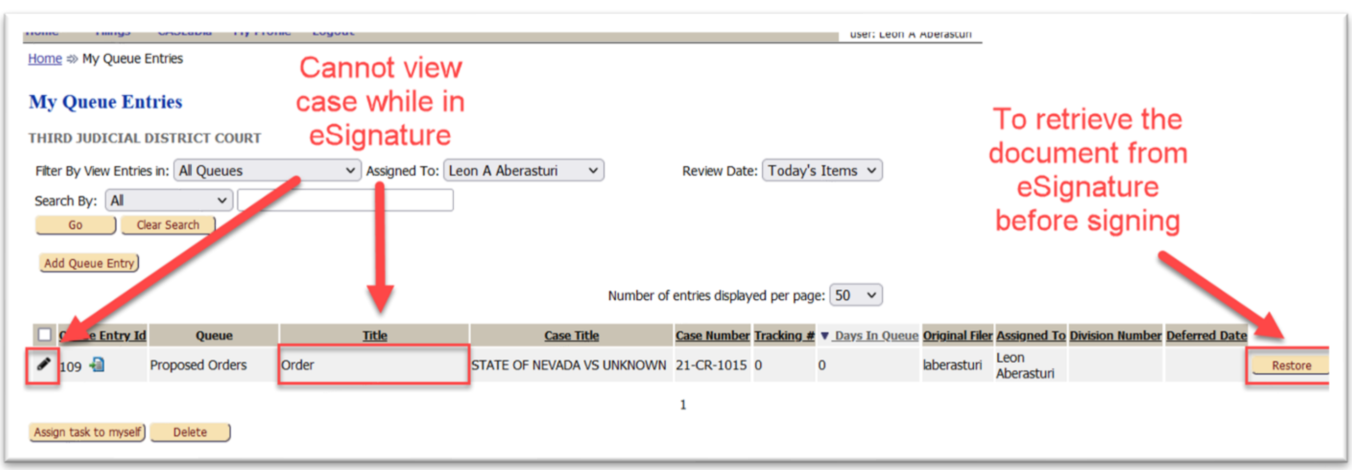
Login to the eSignature application using your eFlex username and password.

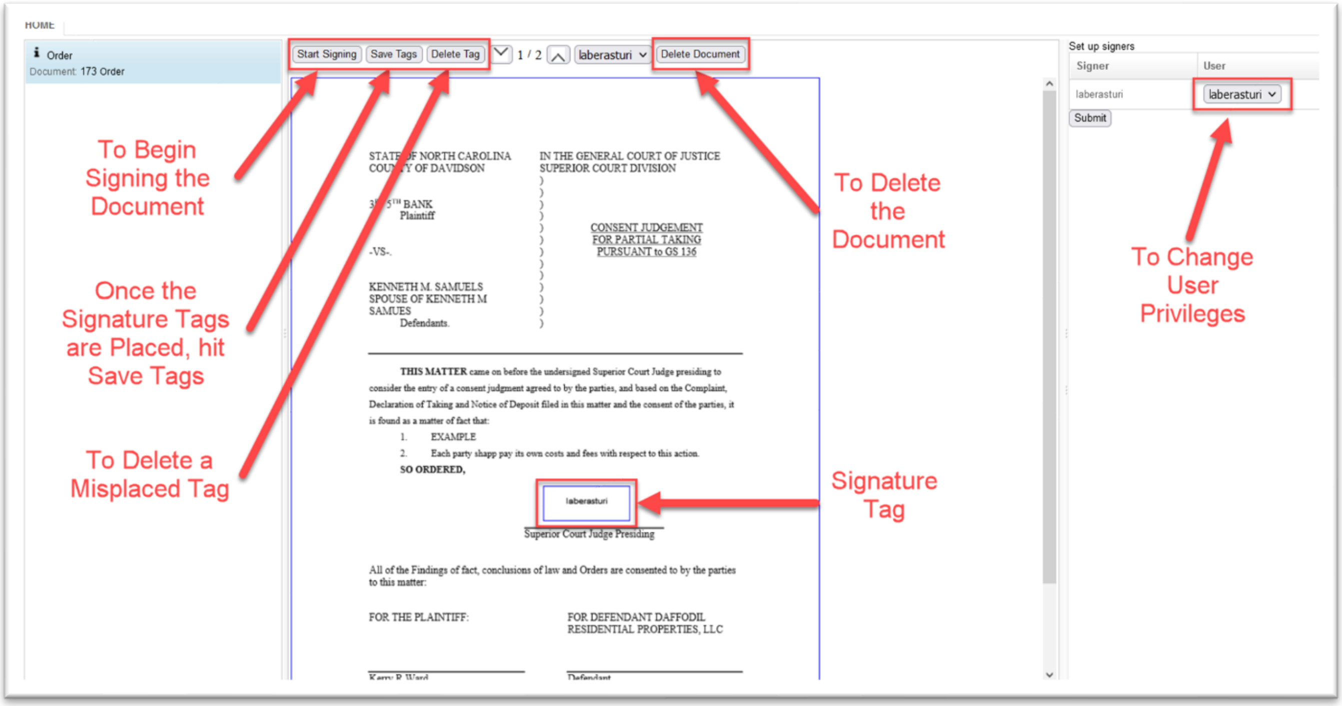
Select the document to be signed under the **Home** tab.



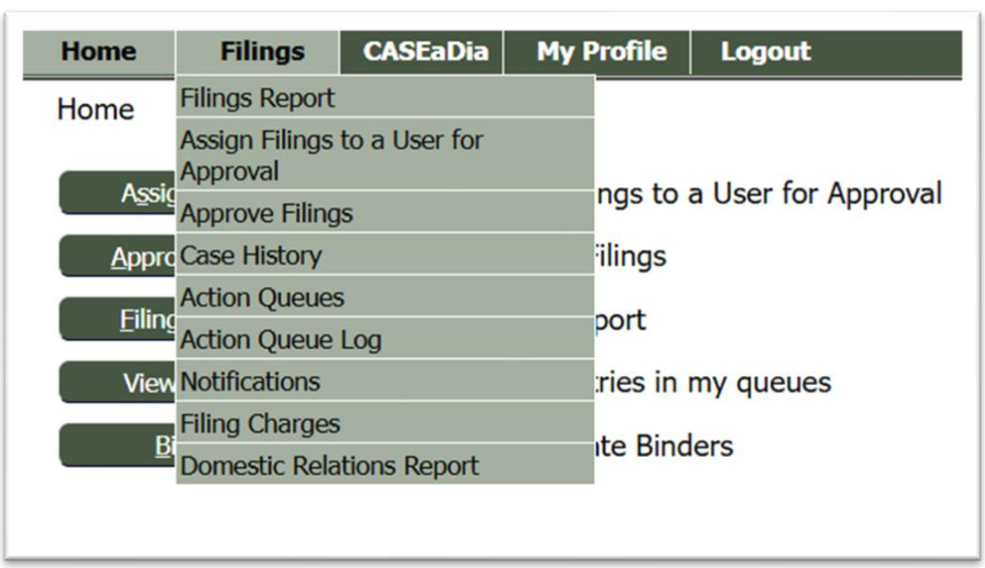
1. Drop a **Signature Tag** on the page at the appropriate location my left-clicking on your mouse. Click and drag the signature tag to the desired location. Use the lower right-hand corner of the signature tag to adjust the signature size. The tag will be highlighted green when it is selected. Clicking off the tag will change the border to blue. Multiple signature tags can be added in a single document.
2. **Save Tags** when all the necessary tags are placed on the document.
3. Select **Start Signing** when you are ready to sign.
4. Click **Sign Next**. The first signature tag will now turn green, showing the user which box is ready to be signed. The tag is also resizable. Then click **Apply Signature**, and the user's stored signature in eFlex will fill the tag.
5. Once all signature tags have been filled, the eSignature portal will automatically close, and the user will be sent back to Court Review.

    Note: While a document is open in eSignature, it will not be accessible in Court Review. A pencil icon (✎) will appear next to the queue entry, and the blue hyperlink leading to the **Action Details** page will be black. The user may Restore the document from eSignature if errors were found in it. A warning message will appear, and then a note will be attached to the Note History informing future users of the removal.





ADDITIONAL TABS ON THE MENU BAR



The selections available to the User under the Filings Tab are:

FILINGS REPORT

Selecting **Filings Report** from the drop-down menu under the **Filings** tab takes the user to the same page as if they had clicked the **Filings Report** button on the **Home** page. It directs the user to the **Filings Report** page where all filings received by the court. Both external filings (from efilers) and internal filings (initiated by the court) are listed and stored in this report system. Search fields at the top of the page allow the user to easily locate a specific filing or group of filings inside the **Filings** data table. One can also view the current status of any filing.

ASSIGN FILINGS TO A USER FOR APPROVAL

Selecting **Assign Filings to a User for Approval** from the drop-down menu under the **Filings** tab takes the user to the same page as if they had clicked the **Assign Filings** on the **Home** page. Because this page is configured in the system role permissions for only Lead Clerks and those with the role of Admin, this page is not accessible to other roles. This page displays a replica of the data table from the **Filings Awaiting Approval** page**.** The checkbox on the line of each filing works in conjunction with the **Assign** button and the **Assign Selected Filings to** field at the top of the page. It directs the user to the **Filings Report page** where *All* filings received by the court - both **external filings** (from efilers) and **internal filings** (initiated by the court) are listed and stored in this report system. Search fields at the top of the page allow the user to easily locate a specific filing or group of filings inside the **Filings** data table. One can also view the current status of any filing.

APPROVE FILINGS

Selecting **Approve Filings** from the drop-down menu under the **Filings** tab takes the user to the **Filings Awaiting Approval** page, which is the same page as if they had clicked the **Approve Filings** button on the **Home** page. All filings received by the court – both external filings (from efilers) and internal filings (initiated by the court) need to be approved to be recorded in the CMS (case management system). The **Filings Awaiting Approval** page lists in a data table all filings that have yet to be reviewed and approved. Clicking on the **tracking #** of an individual filing directs the user to the **Approve Filing** page where the clerk processes the filing.

CASE HISTORY

Selecting **Case History** from the drop-down menu under the **Filings** tab takes the user to the **Cases** page. Here the user enters a case number in the provided field and click Case History button or **Service List** button.

ACTION QUEUES

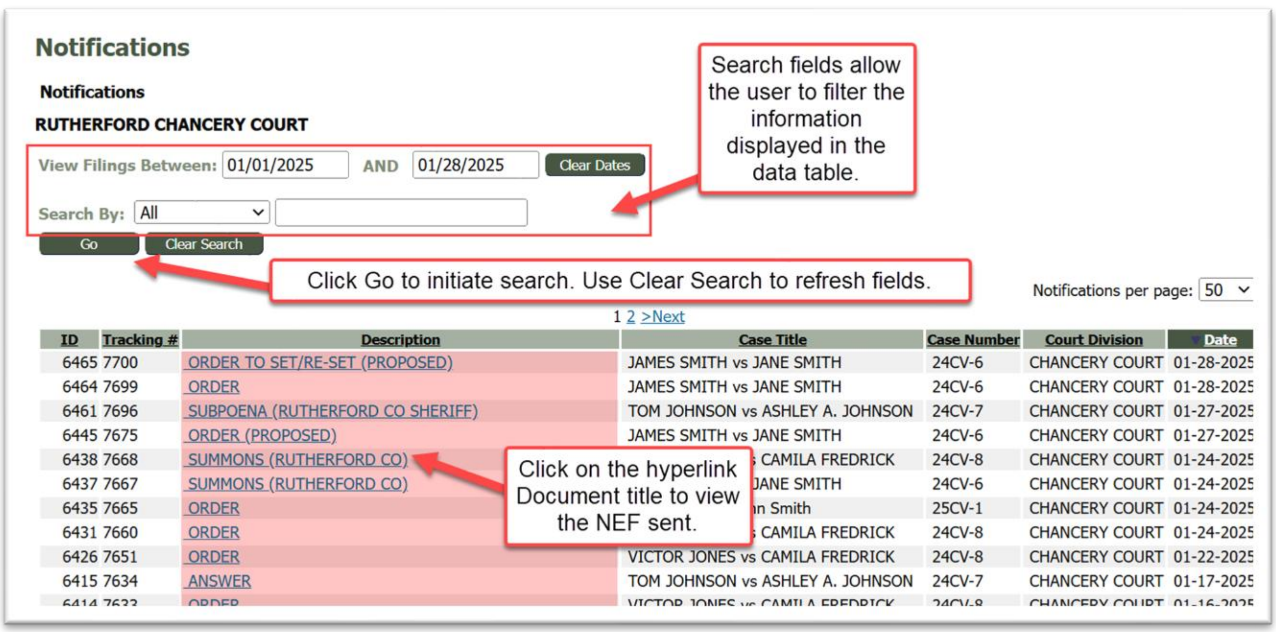
Selecting **Action Queues** from the drop-down menu under the **Filings** tab takes the user to their **My Queue Entries** page, which is the same page as if they had clicked the **View Queues** button on the **Home** page. All queue entries, or tasks, are listed in a searchable data table awaiting the necessary attention from court personnel.

ACTION QUEUE LOG

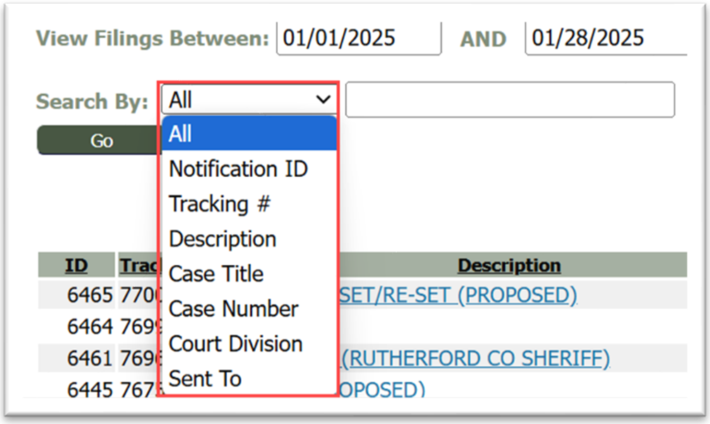
Selecting **Action Queue** log from the drop-down menu under the **Filings** tab takes the user to the My Queue Entries **Action Queue Log**. This page records all queue entries that have been completed. A user may search its records using the filtering fields to locate a specific queue entry.

NOTIFICATIONS

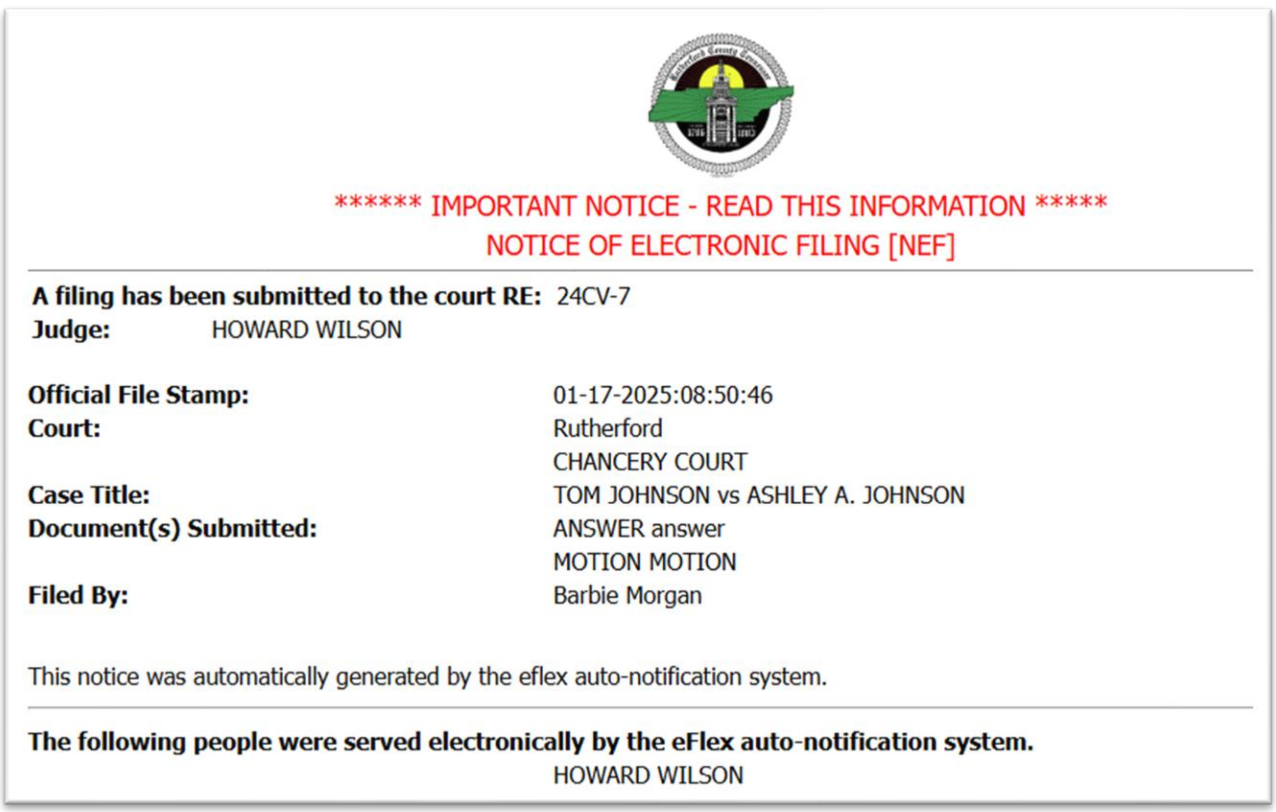
Selecting **Notifications** from the drop-down menu under the **Filings** tab takes the user to the Notifications page. Here the user may view a sortable data table listing the official NEF's (Notice of Electronic Filing) sent out by the court to the case parties. It identifies what documents were filed and which parties received notice electronically through the eFiling system and which would need to be served by traditional means. Addresses of those being served traditionally are included in the NEF.



- **Search Fields** at the top of the page allow the user to filter the display of information in the Data table. In addition to setting date parameters for when the NEFs were sent, the user may select a category of search from the drop-down list in the **Search by** field. Click **Go** to initiate a search. Click the **Clear Search** button to refresh the page and clear the search fields.



- Column headers in the data table have an ascending/descending sort feature that sorts alphabetically or numerically. Click the column header of choice to cause the table display to be organized according to the header selected. Clicking the column header a second time reverses the order of the displayed information.
- The number of notifications shown per page can be adjusted by selecting another menu option from the **Notifications per page** drop-down field. This field is located on the right above the Data Table.
- Click the hyperlinked document title to view the NEF in a newly opened browser tab.


****** IMPORTANT NOTICE - READ THIS INFORMATION *****
NOTICE OF ELECTRONIC FILING [NEF]

A filing has been submitted to the court RE: 24CV-7
Judge: HOWARD WILSON

Official File Stamp:	01-17-2025:08:50:46
Court:	Rutherford CHANCERY COURT
Case Title:	TOM JOHNSON vs ASHLEY A. JOHNSON
Document(s) Submitted:	ANSWER answer MOTION MOTION
Filed By:	Barbie Morgan

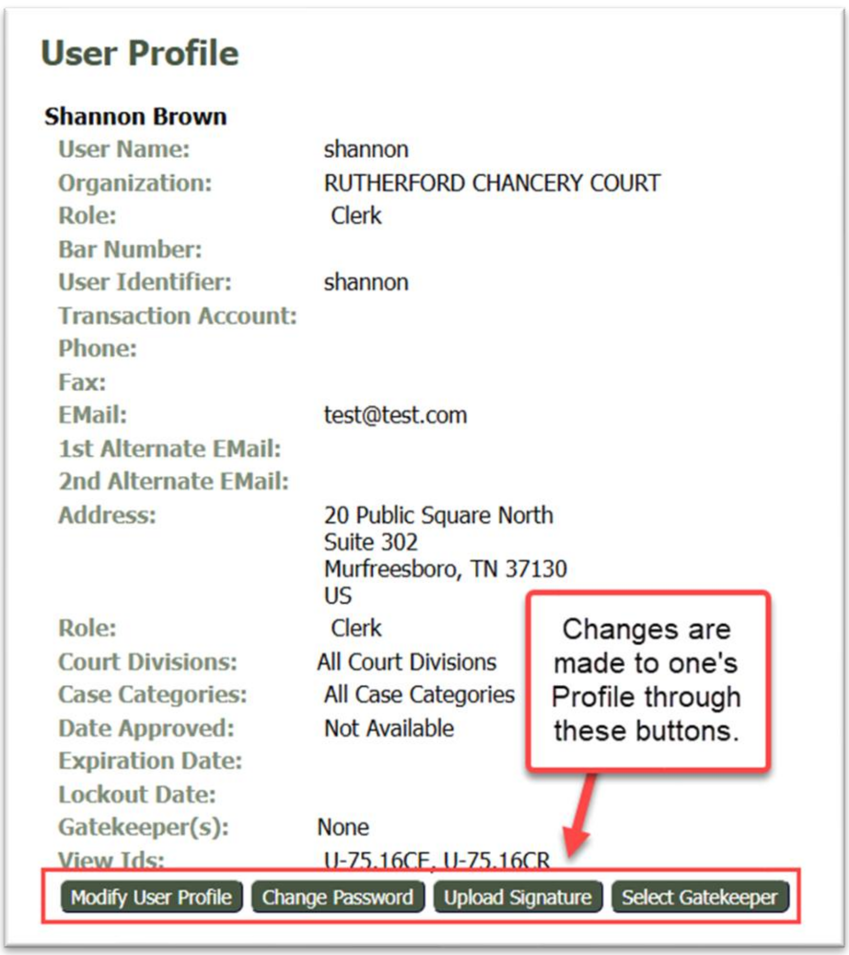
This notice was automatically generated by the eflex auto-notification system.

The following people were served electronically by the eFlex auto-notification system.
HOWARD WILSON

MY USER PROFILE

To assist you in managing your profile, the selections available to the user under the My Profile Tab are:

Selecting **My User Profile** from the drop-down menu under the **My Profile** tab allows the court user to view and edit their profile.



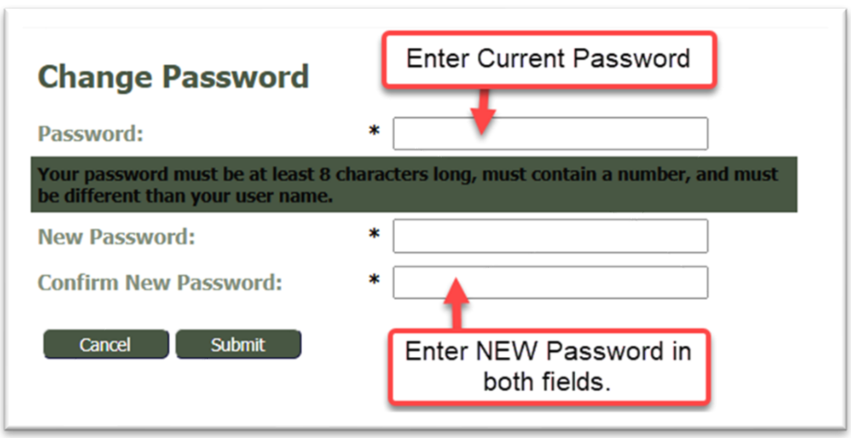
BUTTONS ON THE MODIFY USER PROFILE PAGE

MODIFY USER PROFILE BUTTON

- Click the button **Modify User Profile** to be directed to the **Modify User** page to make changes.
- Be aware that some fields on this page 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 username, the organization the user is associated with, the user identifier (CMS id), court location, and case categories.
- Clerks do not need to enter an alternative email. The 1st and 2nd **Alternate Email** fields are primarily for the convenience of attorneys with legal assistants who need to be notified.
- The **Email Notification** section on this page lists system notifications that can be sent to the court user. Identify which notifications you want to receive and which ones you do not want to receive by marking the checkbox next to the listing. It is always recommended to mark the checkbox **A Queue Entry has been assigned to me.**
- To save changes, click the **Submit** button. To discard changes, click **Cancel.**

CHANGE PASSWORD BUTTON

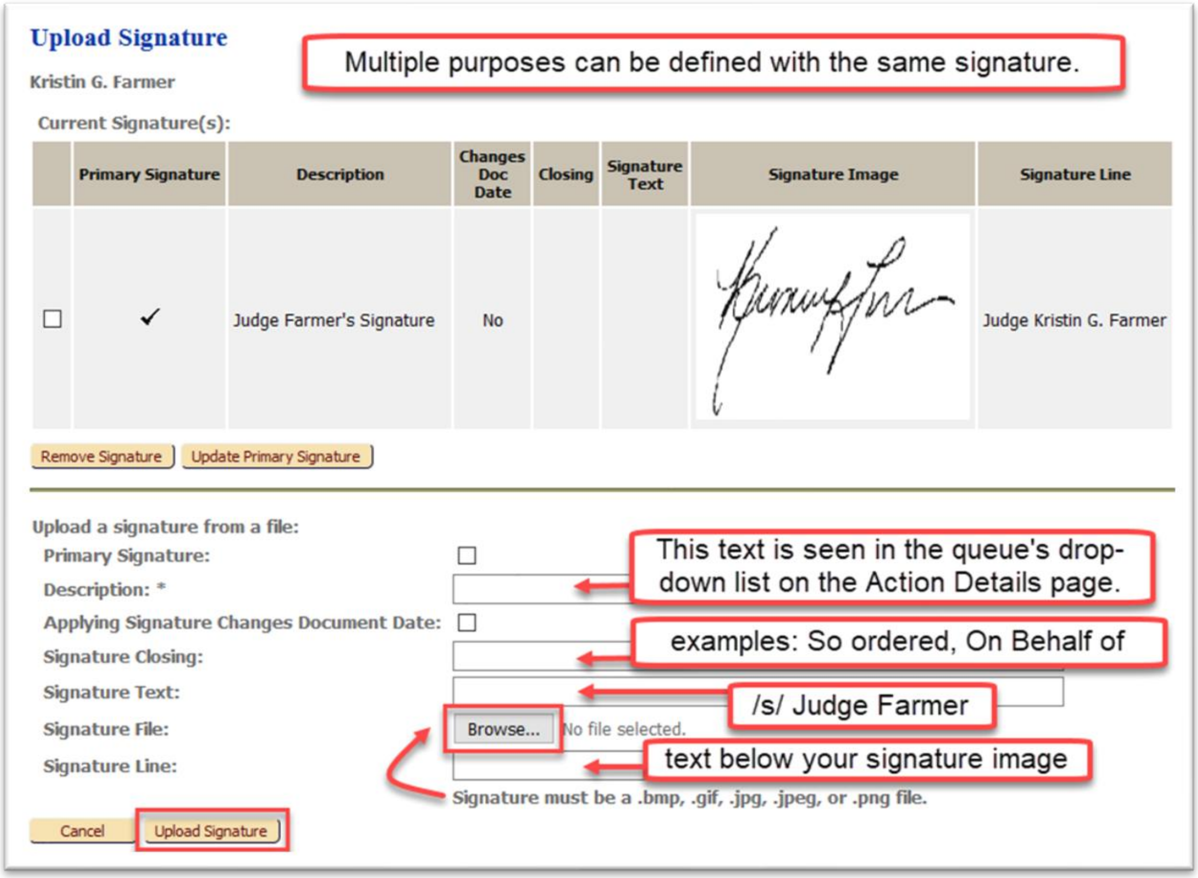
- Click the button **Change Password** to be directed to the **Change Password** page.



- The current requirements state that your password must be at least 8 characters long, must contain a symbol other than a character or number, and must be different than your username.
- To save changes, click the **Submit** button. To discard changes, click **Cancel**.

UPLOAD SIGNATURE BUTTON

- Click the button **Upload Signature** to be directed to the **Upload Signature** page.

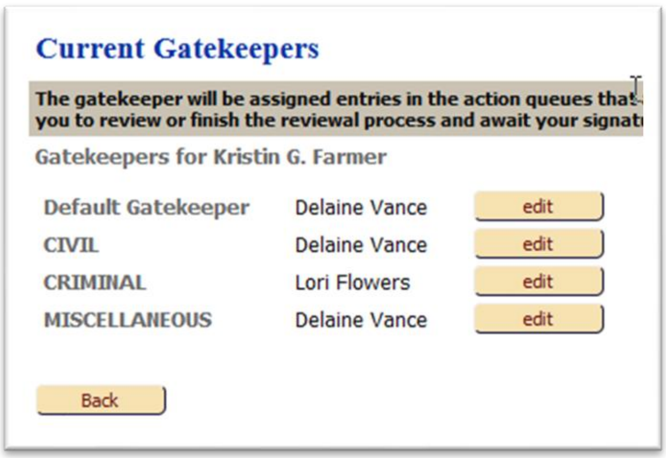


- Mark the checkbox **Primary Signature**, if applicable for this signature.
- Fill in the text boxes with the appropriate information.
  - **Description:** This text is seen in the queues' dropdown list on the **Action Details** page identifying the signature. If a judge has multiple signatures for different purposes, they may choose to identify them as Judge Jones – Order, Judge Jones – Hearing, Judge Jones – Primary, etc. as applicable.
  - **Signature Closing:** This text appears just above the image, (if an image is used), or just above the electronic signature text. An example would be the phrase "So ordered." Or "On Behalf of."
  - **Signature Text:** This is the electronic signature text, usually following the format: /s/Judge Jones. This is not required if an actual signature image is uploaded by browsing for the **Signature file line**.
  - **Signature File:** Click the **Browse** button to search the local computer or network for the correct signature file to upload. Be sure the file to attach is one of the accepted formats.
- To remove a signature, mark the checkbox to the left of the created signature and click the **Remove Signature** button.

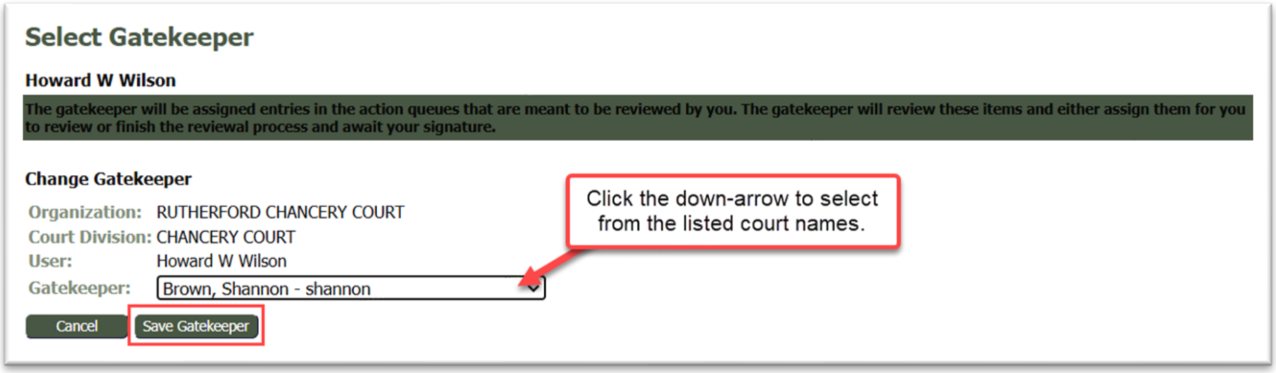
- Click **Upload Signature** at the bottom of the page to upload the signature file, save the data entered, and refresh the page. The new signature now displays.
- The court user will be able to use multiple signatures, if desired. Simply follow the same procedure for as many signatures as needed, making sure the description entered is unique for each signature. The user should select the signature to be the primary and then click the button **Update Primary Signature**. This will place a checkmark in the **Primary Signature** column.

SELECT GATEKEEPER BUTTON

- Click the button **Select Gatekeeper** to be directed to the **Current Gatekeepers** page.



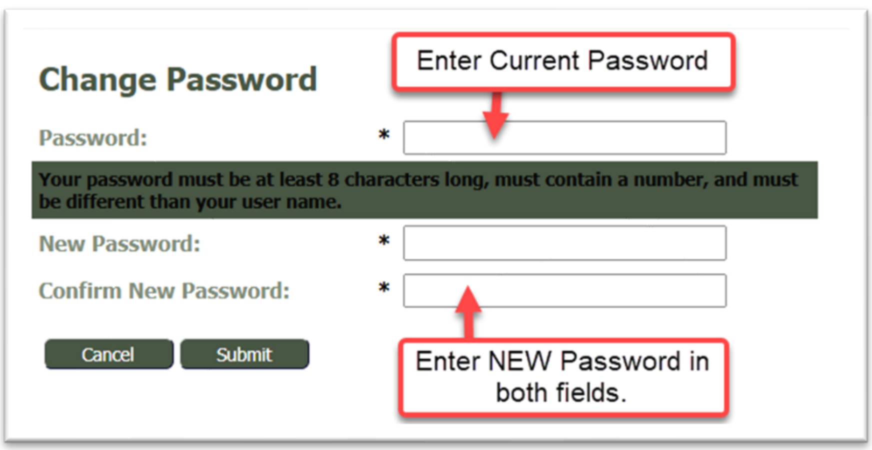
- Judges are the primary role that would use a gatekeeper.
- Adding a gatekeeper to a user profile affects the queue process. Filings that route to queues assigned to a judge will first go to his or her gatekeeper for review. The gatekeeper can then reassign the filing to the judge and include a note informing the judge if more review is necessary or if the filing is ready for his signature.
- If a judge has added a gatekeeper, by default the judge will not be able to view any filings routed to his queues until the gatekeeper has reassigned the filings back to the judge. However, the judge can work within this system behavior by filtering the fields on the **My Queue Entries** page to view entries assigned to **All Users.** Clicking **Go** will refresh the page and expand the listed queue entries to allow viewing of all queues to which the judge has permissions or division IDs to see.
- To edit the currently assigned gatekeeper, click the **edit** button on the **Current Gatekeepers** page to be directed to the **Select Gatekeeper** page. Make the changes there and click the **Save Gatekeeper** button.



CHANGE MY PASSWORD

Selecting **Change My Password** from the drop-down menu under the **My Profile** tab directs the user to the **Change Password** page where the court user enters their current password and their new password. The screen then requires entering the new password a second time for verification.

The current password requirements state that your password must be at least 8 characters long, must contain a symbol other than a character or number, and must be different than your username.

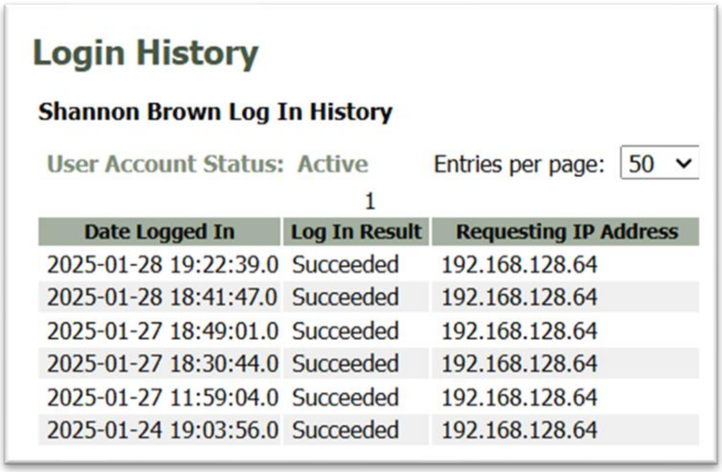


VIEW LOGIN HISTORY

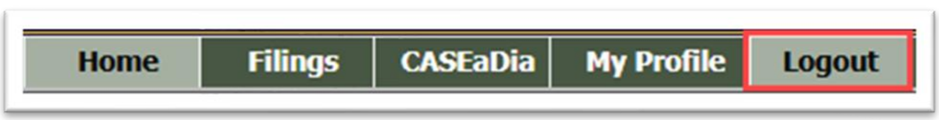
Selecting **View Login History** from the drop-down menu under the **My Profile** tab directs the user to the **Login History** page where the court user can view a list of login attempts to their account, which can help the user monitor any unauthorized login attempts. The Log will show the date and time of the attempted login, the login result, and the requesting IP address. If unusual activity is identified in the **Login History**, it is recommended that the user change their password and notify their IT department. With the IP address, the IT department can determine if it was within the company or an external IP address, and who might be trying to log in as you. Changing one's password on a regular basis is one way to help avoid unauthorized access to your account.

If you want to view more entries per page, just change the value in the drop-down field.

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, the court administrator can reset the account. Changing one's password on a regular basis is recommended to help avoid unauthorized access to the account.



HOW TO LOG OUT



- To log out and terminate the current session to the server, click **Log Out** on the Menu Bar.
- A red text message will appear if you have incomplete filings and ask if you are sure of this action.
- Review the list of incomplete filings that have yet to be submitted to the court and choose to complete them, or leave them as drafts.
- As a reminder, eFlex is a web application. The web session will terminate automatically if there is no activity on the webpage for 20 minutes. A session is considered active if there is interaction with the web server, such as clicking **Next** or the **Submit** button. Typing in a text field does not count as being "active."

BINDERS

The eFlex system provides tools for gathering all required court documents and any additional requested research for one or more cases into a single, navigable pdf document. Once the binder is generated, the Adobe Acrobat Reader functions are used to navigate, highlight, or mark the PDF located on the user's local computer. Binders can be used during hearings as an invaluable resource or can be distributed for requested documents to the media, to other courts, or to other individuals when appropriate.

The **Binders** page is accessed by clicking hovering over the **CASEaDia** tab and selecting **List Binders** from the drop-down menu.

CREATING A NEW BINDER

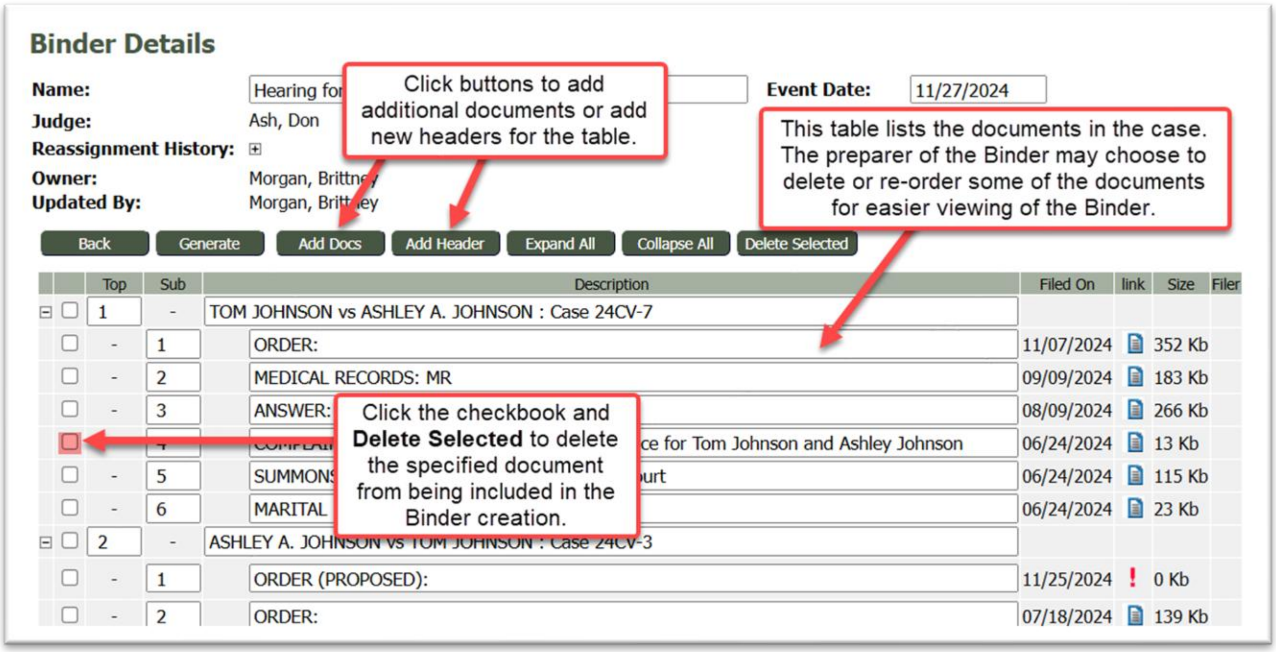
1. On the **Binders** page, select the applicable **Court Division** from the drop-down menu, if applicable.
2. Select either **Add Single-Case Binder**, **Add Multi-Case Binder**, or **Add Appellate Binder** (The Tennessee TnCIS eFlex System is not connected to the Tennessee Appellate Case Management System**)**.

Note: Once the binder has been created, the table displaying the completed binders will also have an **Auto Update** checkbox on the line of each listed binder. Marking the checkbox will cause a field to appear in the **Change Generation Day** column. Click the down-arrow in this field to select which day of the week the automatic update will occur.

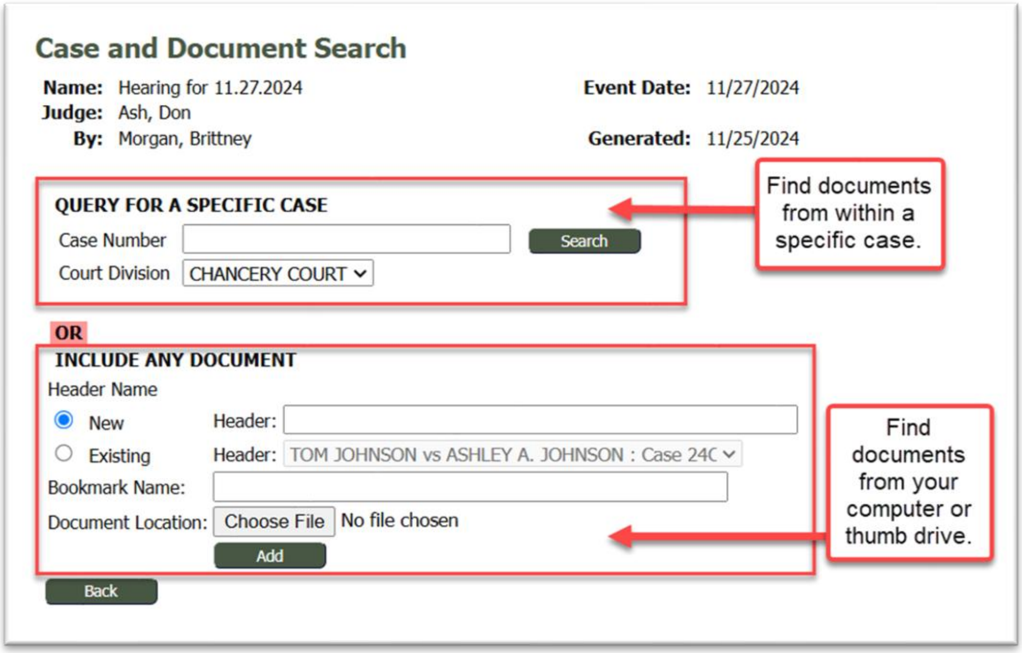
3. Fill in the requested information after selecting one of these options, and click either **Search** or **Create Binder** to proceed.
4. Click **Create** to be directed to the **Binder Details** page.

   NOTE: Once the binder has been created, the table displaying the completed binders will also have an **Auto Update checkbox** on the line of each listed binder. Marking the checkbox will cause a field to appear in the **Change Generation Day column**. Click the down-arrow in this field to select which day of the week the automatic update will occur.

5. Click **Create** to be directed to the **Binder Details** page**.**



6. On the **Binder Details** page, all documents from the identified case will be listed as subcategories under the case number category header. Click the checkbox on the line of any document you choose to remove from the binder and click **Delete Selected**.
7. To include additional documents to the list, click the button **Add Docs.** Prior to clicking the button, you may choose to add a new **Header** under which the added documents will be placed. (This is optional. The system will generate a recommended **Header Title** when searching to add a specific case number already recorded in the system).
8. On the **Case and Document Search** page, you can choose to query for a specific case (top portion of the page), or you can choose to browse your computer for a specific document (bottom portion of the page).

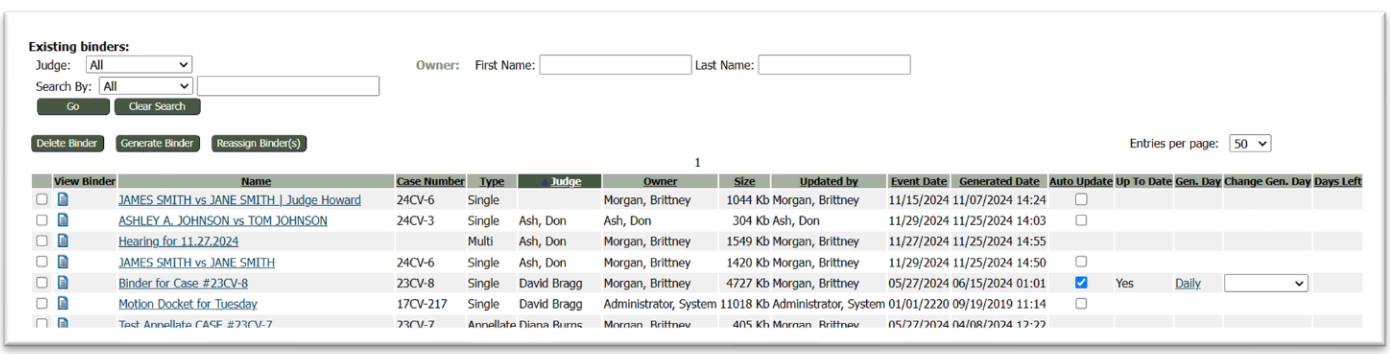


SEARCHING EXISTING BINDERS

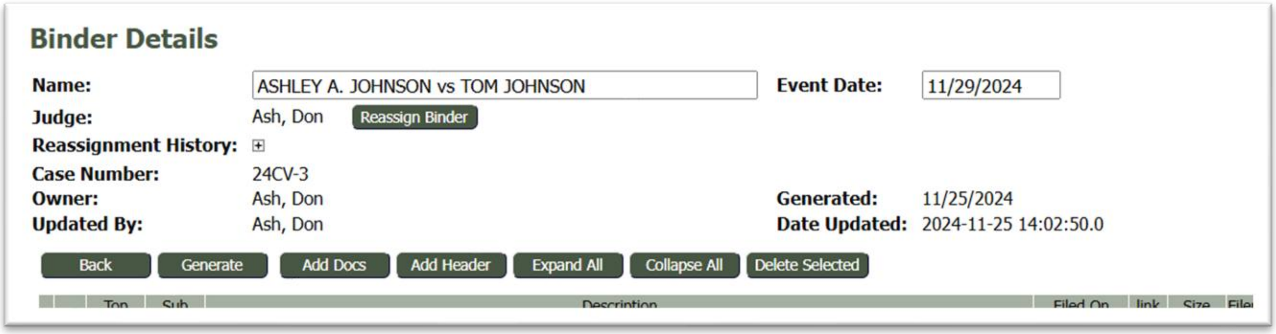
Existing Binders can be searched for by using the filtering fields provided.

1. The **Judge** drop down Menu, and the **Search By** drop down menu where **All**, **Name**, **Case Number**, **Type**, and **Judge** can be selected.
2. Click **Go** to search.
3. Click **Clear Search** to remove existing search criteria.

Existing Binders that meet the search criteria will appear on the Binders Data Table.

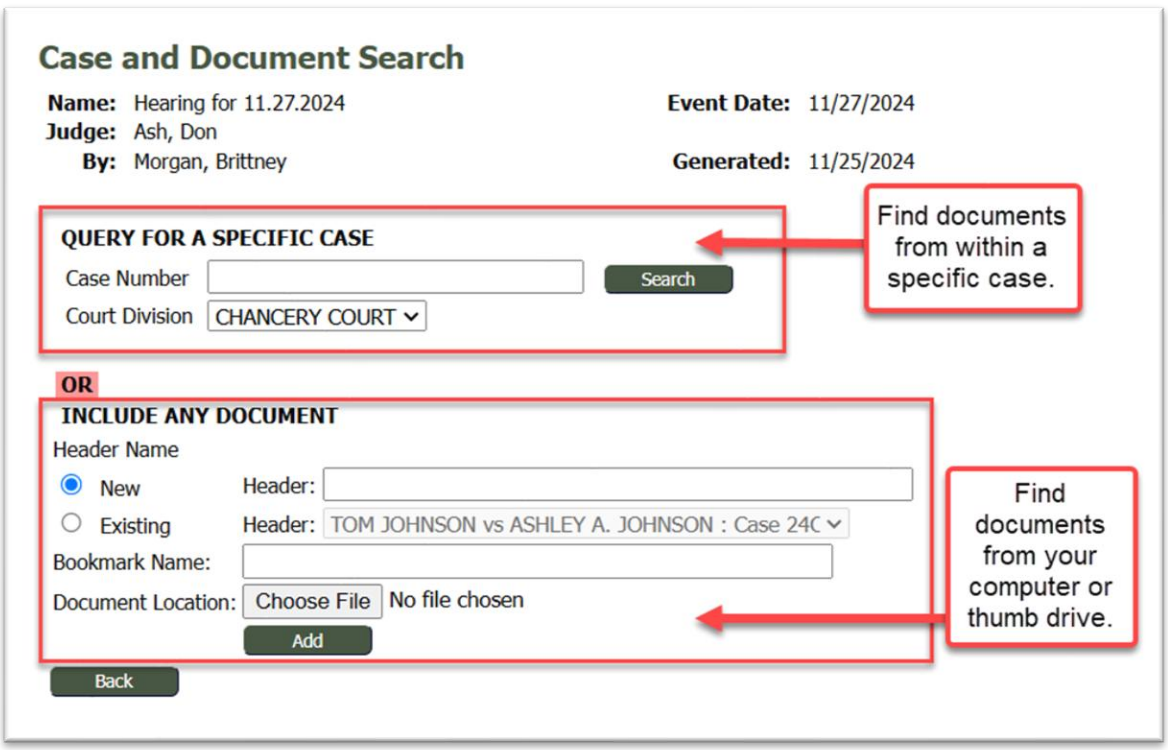


4. To select a Binder or Binders, click the checkbox on the far left of the table.
5. A Binder can be viewed by clicking the document icon in **View Binder** column. Clicking this icon will open up a new tab that shows the contents of the binder in .pdf format. This can then be printed if desired.
6. To edit a binder or add documents to it, click the blue hyperlinked Binder **Name** which will open the **Binder Details** screen.



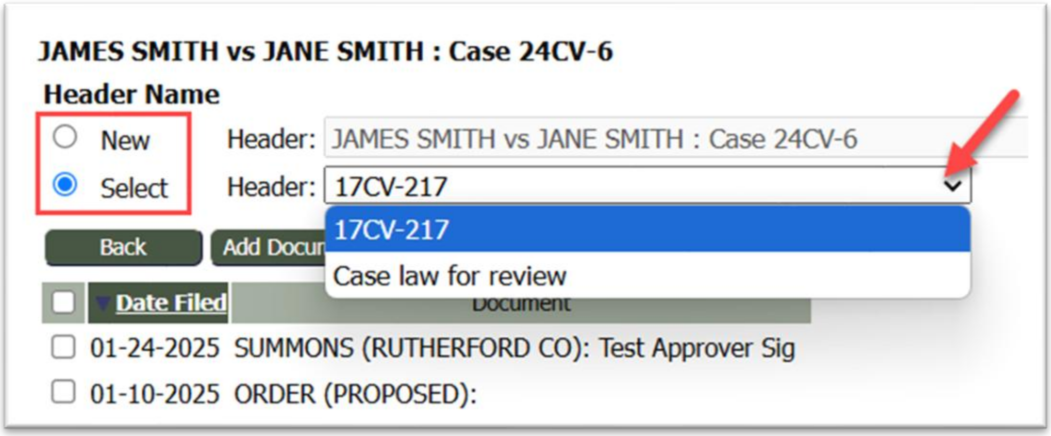
7. To generate a Binder(s), select its checkbox and click **Generate Binder**.
8. To delete a selected Binder(s), mark its checkbox and click **Delete Binder**.

ADDING CASES AND DOCUMENTS TO BINDERS.

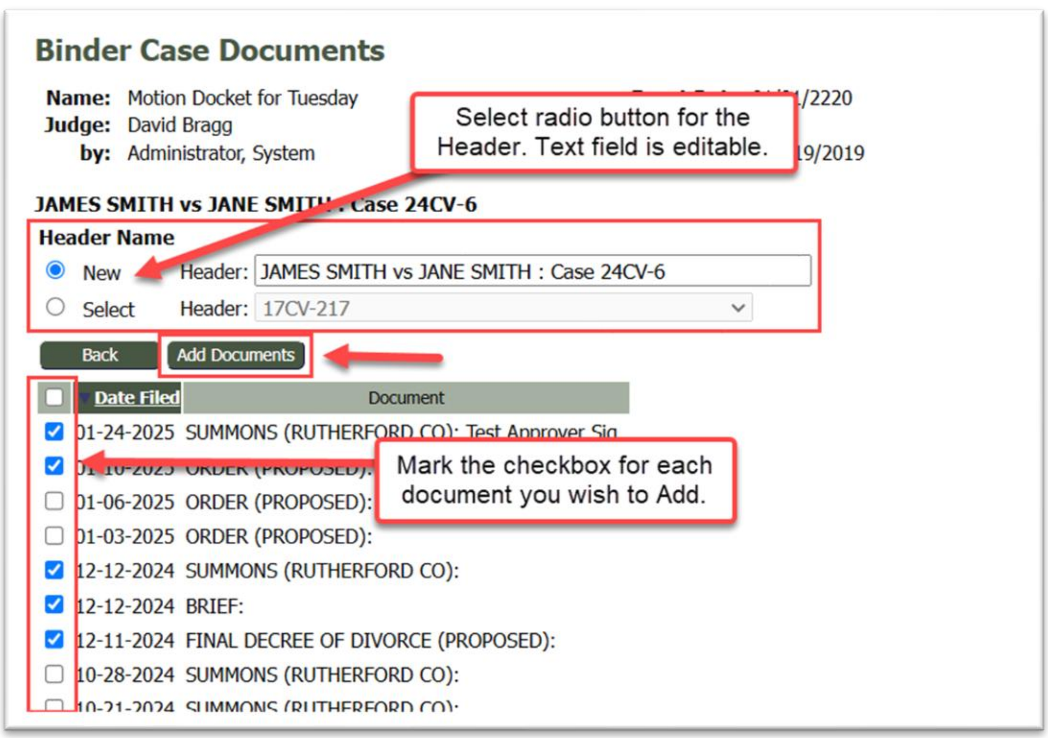


QUERY FOR A SPECIFIC CASE ON THE CASE AND DOCUMENT SEARCH PAGE

1) Enter the case number in the provided **Case Number** field. Click **Search.**
2) The system will direct the user to the **Binder Case Documents** page. The system-generated header will display in the top **Header** field next to the radio button **New**. By default, the system will mark this radio button, but you can choose instead the **Select** radio button, which will enable you to click the down arrow in the bottom **Header** field to select from the existing **Header Titles** already listed on the **Binder Details** page. Your choice will determine under which header the documents you are adding will be listed.



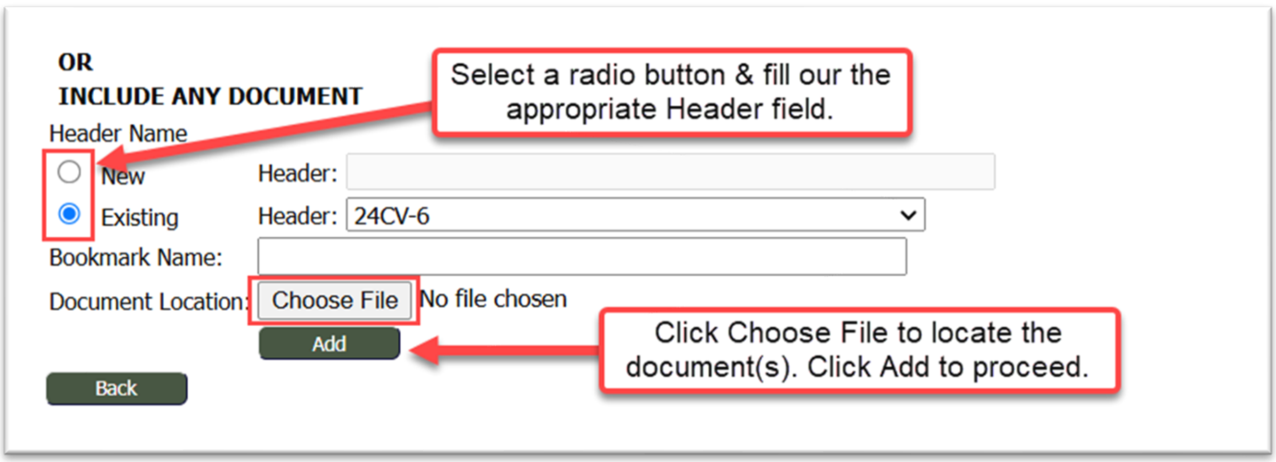
3) On the **Binder Case Documents** page, the bottom portion of the screen will display all the documents associated with the identified case. Mark the checkbox next to each document you wish to include in the binder, or, mark the top checkbox to select all documents listed.
4) Click the button **Add Documents**. The user will be directed back to the **Binder Details** page where the newly added documents will display under the selected header.



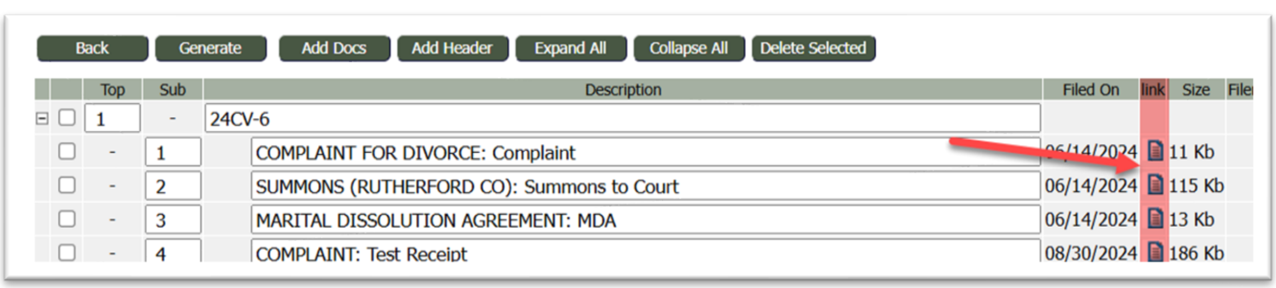
a) **Browse Your Computer To Locate Documents On The Case And Document Search Page**
   1) In the bottom section of the **Case and Document Search** page, select a radio button for the **Header**. If the Header already exists on the **Binder Details** page, select **Existing**. Click the down-arrow in the **Header** field to the right of the radio

button and select which header under which you want the documents to be listed in the binder.

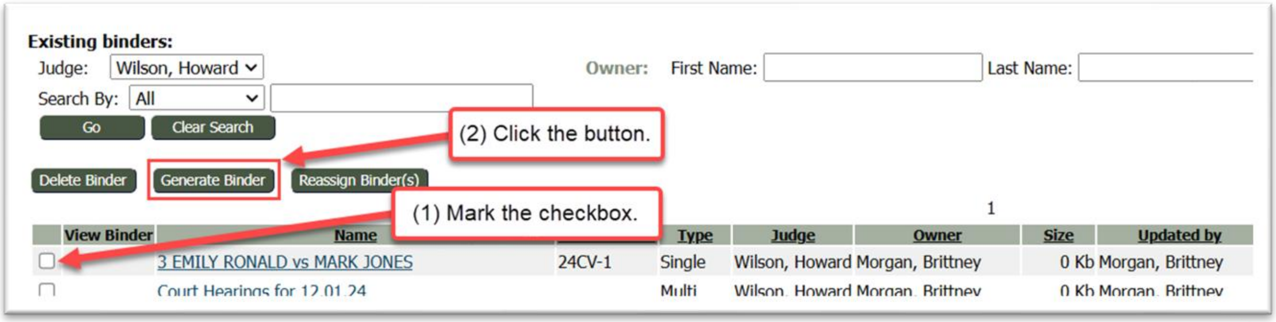
2) If you are adding a new header at this point in time, click the radio button **New** and enter a name for the header in the provided field to its right.
3) In the **Bookmark Name** field, enter text that identifies how you want the document listed.
4) Click **Browse** to locate and select the document from your computer.
5) Click the **Add** button.
5) The user will be directed back to the **Binder Details** page. The newly added document will display under the selected header.



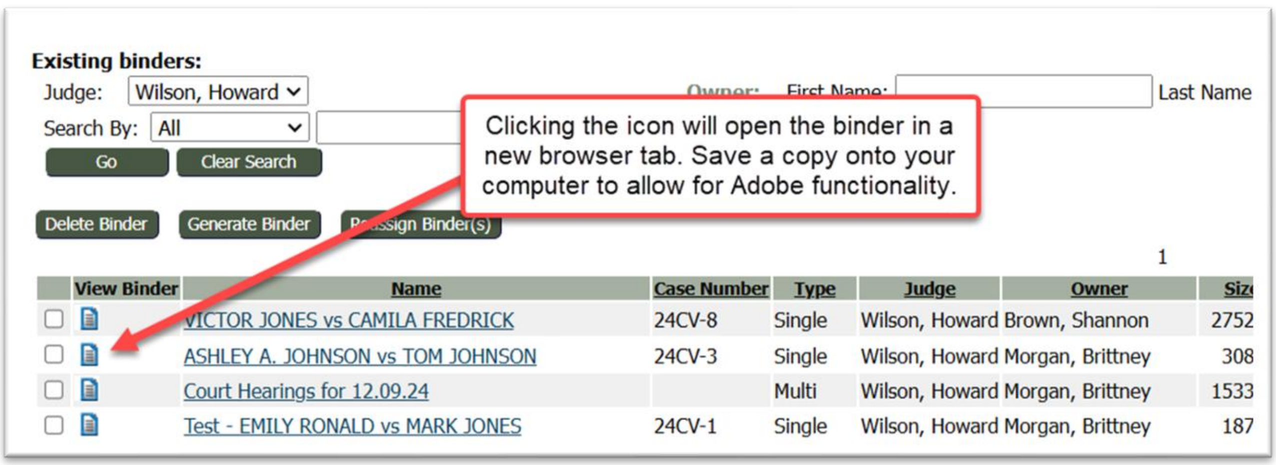
9. On the **Binder Details** page, use the **Expand All** and **Collapse All** buttons to visualize how the binder will be organized. Alternately, click the individual **(+/-)** signs in the far left column on each header line to individually expand or collapse a header and its subcategory documents.
10. To change the order of the listed documents under a header, click the **Number** field of the document you want changed and edit the number to reflect what line you want it to be. Click any number field to trigger the document order change.
11. Clicking the **link** icon will open a new browser tab and display the listed document in pdf form.



12. To move the binder from the **Draft stage** to a single document pdf, click the **Generate** button at the top of the **Binder Details** page. The user will be directed back to the **Binders** page.
13. On the **Binders** page, mark the checkbox in the left column on the line of the newly created Draft.
14. Click the **Generate Binder** button.



15. When the system has completed the creation of the binder, an icon will display in the **View Binder** column. Clicking the **icon** will open a new browser tab and display the newly created binder.



16. Choose to download and save the document. Use the functionality tools provided by **Adobe Acrobat Reader** to navigate, highlight, or mark the PDF.