

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).

Home	Filings	CASEaDia	Accounts	System	Court Configuration	My Profile	Logout
Home							
Resolve Filings	(17)	Resolve Filings On Hold					
Filings Report		Filings Report					
Approve Filings	(311)	Approve Filings					
Notifications		Notifications					
EMails	(19)	Emails					
Approve/Deny User	(8)	Approve/Deny User Request					

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.

Accounts and Users Requesting Approval

Search By: Role:

Court Division:

Organization:

Awaiting Approval

Name	Username	Organization	Bar Number/User ID	Role	Expiration Date	
Baxter, James	jbaxter	SELF REPRESENTATIVES U-PROSE169		Self Represented Litigant		<input type="button" value="View/Approve/Deny"/>
Prose, New	newprose	SELF REPRESENTATIVES U-PROSE176		Self Represented Litigant		<input type="button" value="View/Approve/Deny"/>
Schulz, Marc	marcschulz	SELF REPRESENTATIVES U-PROSE170		Self Represented Litigant		<input type="button" value="View/Approve/Deny"/>

- 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.

User Profile

Boyd Monroe

User Name: Boyd

Organization: MONROE & SCHMIDT, LLC

Bar Number: 87896

User Identifier:

Transaction Account:

Phone:

Fax:

E-Mail: boyd@tybera.com

1st Alternate EMail:

2nd Alternate EMail:

Address: 563 E 770 N
Orem, TN 84097
US

Role: Attorney

Date Approved: Pending

Expiration Date:

Reason for approval or denial:

- 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.

Create Company Account

*Required Fields

Company Name: * MONROE & SCHMIDT, LLC

Company Code: *

Fee Payments: * Exempt Non-Exempt Optional Waiver Code:

Address Line 1: * 563 E 770 N

Address Line 2:

Address Line 3:

City: * Orem State State: TENNESSEE

Postal Code: * 84097 Country: UNITED STATES

Require User Address

Allow Case Initiation

Create a system code for the organization.

Mark the radio button applicable to the organization.

Click 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.

User Profile

Test Mctesterson

User Name: LexisNexis Test

Organization: TEST FIRM

Role: Attorney

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

Reason for approval or denial:

Type a Welcome Message or copy/paste a statement from a pre-written script.

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.

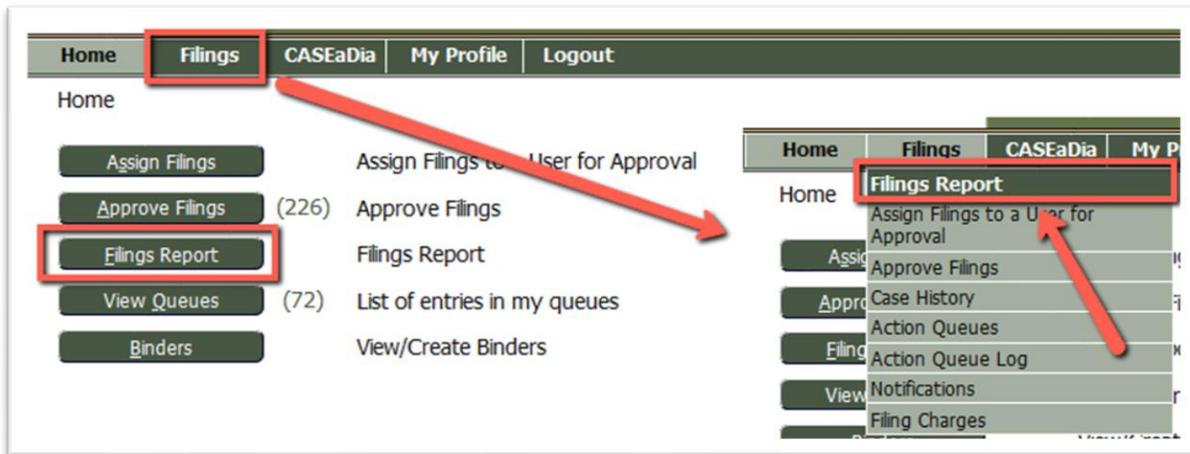
All filings received by the court - both external filings (from eFilers) and internal filings (initiated by the court) are listed and stored in this report system.

NAVIGATING THE FILINGS REPORT PAGE

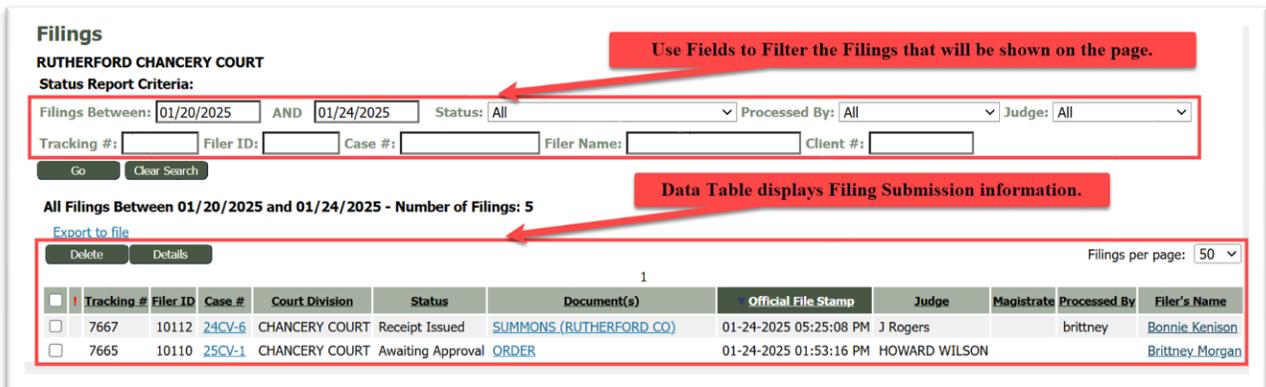
All filings received by the court - both external filings (from eFilers) and internal filings (initiated by the court) are listed and stored in this report system.

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

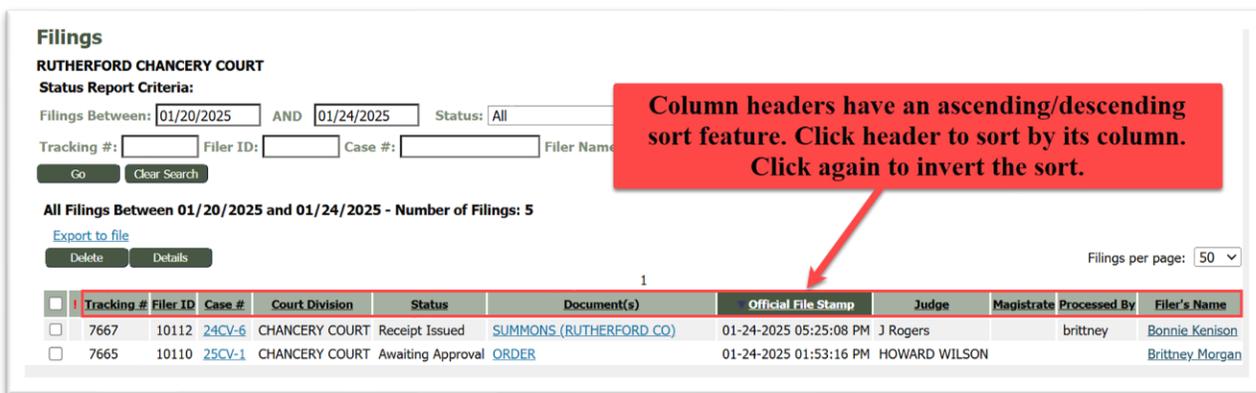
When searching for a specific submission or group of submissions, use the various filters at the top of the page individually or in conjunction with each other to locate what you are needing. Click **Go** to initiate a search based on the filter criteria entered. Click the **Clear Search** button when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



Filings
RUTHERFORD CHANCERY COURT

Status Report Criteria:
Filings Between: 01/20/2025 AND 01/24/2025 Status: All

Tracking #: Filer ID: Case #: Filer Name:

Go Clear Search

All Filings Between 01/20/2025 and 01/24/2025 - Number of Filings: 5

Export to file

Delete Details

Filings per page: 50

Tracking #	Filer ID	Case #	Court Division	Status	Document(s)	Official File Stamp	Judge	Magistrate	Processed By	Filer's Name
7667	10112	24CV-6	CHANCERY COURT	Receipt Issued	SUMMONS (RUTHERFORD.CO)	01-24-2025 05:25:08 PM	J Rogers		brittney	Bonnie Kenison
7665	10110	25CV-1	CHANCERY COURT	Awaiting Approval	ORDER	01-24-2025 01:53:16 PM	HOWARD WILSON			Brittney Morgan

- 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).
- Filer ID** - This is a unique ID number given to the submission by the Filer Interface.
- 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.
- Court Division** - This field displays the court division to which the filing was sent.
- 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).

Filing_Report ⇒ Filing Details

Filing

Description: Divorce without Minor Children
Status: [Receipt Issued](#)

Tracking #	Filer ID	Case Number	Case Title	Court Division	Status Updated	Filer's Name	Client #	Approved By
7668	10113	24CV-8	VICTOR JONES vs CAMILA FREDRICK	CHANCERY COURT	01-24-2025 05:51:33 PM	Bonnie Kenison		brittney

Filing

Description: Divorce without Minor Children
Filer: Bonnie Kenison
Payment Method: Token: X
Return addresses: Email: tnoonan@tybera.com
Filing: https://test.tybera.net/tncis/courtreview/runit
Filing Package: None

Description	Document	Submitter
SUMMONS (RUTHERFORD CO)	generated.pdf Replace here	Bonnie Kenison
- Document Form	requestForService.xml	
Form	Form.xml	

Response

Description	Document
Receipt	receipt.html

[View Validation Request](#) [Modify Validation Request](#)
[View CMS Response Data](#) [Modify CMS Response](#)

Queue Entries Resulting from this Filing:

Queue Entry Id	Queue	Status	Review/Completion Date	Last Assigned To	Reinstate
<input type="checkbox"/> 3139	Sheriff Queue - Rutherford Co Pending				

[Add Queue Entry](#)

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.

Filer Filing Status

Status:	Filed 01-24-2025:05:51:33 PM
Client #:	
Filer ID:	10113
Tracking #:	7668
Submitted By:	Kenison, Bonnie
Date Submitted:	01-24-2025 05:48:57 PM
Official File Stamp:	01-24-2025 05:48:57 PM
Case Title:	VICTOR JONES vs CAMILA FREDRICK
Court Case #:	24CV-8
Case Type:	Divorce without Minor Children
Court:	RUTHERFORD CHANCERY COURT
Court Division:	CHANCERY COURT

Note: This filing will be removed from eFlex on 07-23-2025

Docket Text	View B	Filing Section:
SUMMONS (RUTHERFORD CO)		What was filed

Response:

Response Docket Text	View B	Response Section:
Receipt	receipt	How the court responded
SUMMONS (RUTHERFORD CO) genera		

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)
Charges	Authorization Code: 518135 \$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 screenshot shows the 'Approve Filings' page. At the top left, a breadcrumb trail reads 'Home > Approve Filings'. A red callout box points to it with the text: "Breadcrumb Trail. It shows how a user arrived at this page." Below the breadcrumb, the page title is 'Filings Awaiting Approval - Number of filings: 152'. The page is for 'RUTHERFORD CHANCERY COURT' and 'Filing Awaiting Approval'. There are search filters for 'View Filings Between', 'Tracking #', 'Filer ID', 'Case #', 'Filer Name', and 'Client #'. A red callout box points to the 'Tracking #' column header in the table below with the text: "Click the Tracking # of an individual filing to be directed to the Approve Filing page." Another red callout box points to the 'Case Number' column with the text: "No Case # nor title is a case initiation." The table below has columns: Tracking #, Filer ID, Assigned To, Official File Stamp, Document, Case Type, Case Number, and Case Title.

Tracking #	Filer ID	Assigned To	Official File Stamp	Document	Case Type	Case Number	Case Title
<input type="checkbox"/> 7665	10110	Joanna Riggs	01-24-2025 01:53:16 PM	ORDER	Order of Protection	25CV-1	Suzy Smith vs John Smith
<input type="checkbox"/> 7660	10070	Joanna Riggs	01-24-2025 11:06:36 AM	ORDER	Divorce without Minor Children	24CV-8	VICTOR JONES vs CAMILA FREDRICK
<input type="checkbox"/> 7657	10103	Raechelle Wilson	01-23-2025 11:15:10 AM	NARRATIVE-ORDER OF PROTECTION	Order of Protection		
<input type="checkbox"/> 7651	10069	Joanna Riggs	01-22-2025 11:03:18 AM	ORDER	Divorce without Minor Children	24CV-8	VICTOR JONES vs CAMILA FREDRICK
<input type="checkbox"/> 7634	10071	Raechelle Wilson	01-17-2025 08:50:46 AM	ANSWER	Divorce without Minor Children	24CV-7	TOM JOHNSON vs ASHLEY A. JOHNSON

The breadcrumb trail is in the top left corner of the screen. It 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.

Document	Case Type	Case Number	Case Title	Court Division	Filer	Judge	Magistrate	Client
ORDER	Order of Protection	25CV-1	Suzy Smith vs John Smith	CHANCERY COURT	Brittney Morgan	HOWARD WILSON		
ORDER	Divorce without Minor Children	24CV-8	VICTOR JONES vs CAMILA FREDRICK	CHANCERY COURT	Brittney Morgan	HOWARD WILSON		
NARRATIVE-ORDER OF PROTECTION	Order of Protection	24CV-8		CHANCERY COURT	Abby Burnham			

Annotations: "Click + sign to expand section" points to the '+' in the Document column header. "Click Case Number to pull a Case History" points to the case number '24CV-8'.

- 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**.

Annotations: "Both of these buttons require a checkbox first to direct the user to a new page." points to the 'Review and Approve Filing' and 'Details' buttons. "Click to clear a marked checkbox." points to the 'Refresh' button.

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 APPROVAL 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

The screenshot shows the 'Approve Filing' page with several red callout boxes providing instructions:

- Breadcrumb Trail:** A red box points to the breadcrumb trail 'Home ⇒ Approve Filings ⇒ Approve Filing' with the text: 'This is the "breadcrumb trail." Click a former link to return to a former page. This is recommended in lieu of using the browser's back arrow.'
- Note Section:** A red box points to the 'Note From Filer' and 'Note from Court' section with the text: 'This is the Note Section. If there is a Note History, there will be a + sign to click to open it.'
- Case Information:** A red box points to the 'Case Type' dropdown and the table below with the text: 'Case information and the filing's date & time of receipt.'
- Documents:** A red box points to the table of documents with the text: 'Displays documents submitted with the filing.'

Tracking #	Case No.	Case Title	Court Division	Case Type	Judge	Filed Date
7657	New Case	CHANCERY COURT	Order of Protection	HOWARD W. WILSON	01-23-2025 11:15:10 AM	

Approve	Reject	Security	View	Size	Document Type	Additional Docket Text	Edit Data	Proxy User
<input checked="" type="radio"/>	<input type="radio"/>	Public		0.2 MB	NARRATIVE : NARRATIVE-ORDER OF PROTECTION	Case Data collected from filer		
<input checked="" type="radio"/>	<input type="radio"/>	Public		0.2 MB	MOTION : MOTION			

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.

Note From Filer: **None**
 Note from Court: **None**
 Note History **None**

If there are NO messages, the Note Section will identify it as such.

- 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.

Filer: Brian Taylor

Note From Filer: **None**

Note from Court: **Miranda Gross** - Please complete this filing for me. I have a personal emergency I need to attend to. Thank you.

Note History

The + sign indicates there is a Note history table underneath. Click to expand. Click again to collapse.

The Note identifies who sent the message.

CASE INFORMATION SECTION

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

Case Type:

The Case Title and Case No. fields are not editable in full integration mode. The Judge filed is selectable.

Tracking #	Case No.	Case Title	Court Division	Case Type	Judge	Filed Date
7657	New Case		CHANCERY COURT	Order of Protection	HOWARD W. WILSON	01-23-2025 11:15:10 AM

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

Case Type: Order of Protection

Tracking #	Case No.	Case Title	Security	View	Size	Document Type	Additional Docket Text	Edit Data	Proxy User
7657	New Case		Public		0.2 MB	Form Data			
			Public		0.2 MB	NARRATIVE : NARRATIVE-ORDER OF PROTECTION			
			Public		0.2 MB	MOTION : MOTION			

- 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.

Document Type	Additional Docket Text
Form Data	Case Data collected from filer
NARRATIVE : NARRATIVE-ORDER OF PROTECTION	<input type="text"/>
MOTION : MOTION	<input type="text"/>

Click the pencil edit icon if the document type needs to be edited.

Document Type	Additional Docket Text
Form Data	Case Data collected from filer
NARRATIVE : NARRATIVE-ORDER OF PROTECTION	<input type="text"/>
MOTION : MOTION	<input type="text"/>

This pop-up Edit Box appears. Begin typing, and a drop-down menu will display.

Edit Document Type

Document Type:

- 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.

Edit Party: Divorce without Minor Children

Defendant

Company Person

User Identifier:

Party Type:

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.

CMS Party Match Results							
Select	Rank	CMS ID	Name	SSN	DOB	Address	Alias
<input type="radio"/>		D404E729-FBB1-4F99-BFD3-60FD416C54B3	Ronald John Dusek, Jr.			14 Waikiki Blvd. Antioch, TN 37013	

- 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.



Approve Filings ⇒ Approve Filing ⇒ Amended Complaint

Amended Complaint: Real Estate Matters

Case Number : 24CH-14 Case Title : HOMER LIGHT JR (et. al) vs JAMES LIGHT JR (et. al)

Please add the new parties from your Amended Complaint or click Next if there are no new parties to add.

Claim Amount:

Jury Demand:

Add Case Participants (Any party to be served must be added as a distinct party.)

Remove	Participant Name	Type	Attorney/Agent for Party
<input type="checkbox"/>	CLAIRE VOYANT Address: 123 MAPLE ROAD NASHVILLE, TN 37415	Plaintiff	Amy Kathleen Skelton Bar #: 033545

- 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.

Document Type	Additional Docket Text	Edit Data	Proxy User
Form Data	Case Data collected from filer		
ANSWER : ANSWER	<input type="text"/>		Proxy Filer

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.

Filing For	Filing Against	Additional Served On	Additional Hearing For	Participant Name
<input checked="" type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	BEN PIERCE, Defendant
<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	SHANNON PIERCE, Plaintiff

✖ Filing: --Select Filing Type--

Add TnCIS Filing Validate Fees Validate Filing

Total Due Amount: \$0.00

Payment Method: Taken from:

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.

✖ Filing: --Select Filing Type--

Add TnCIS

- Select Filing Type--
- Additional Defendant Filing
- Category 1 - 3rd Party Complaint /Intervening Petitioner
- Category 2 - 3rd Party Complaint /Intervening Petitioner
- Category 3 - 3rd Party Complaint /Intervening Petitioner
- Category 4 - 3rd Party Complaint /Intervening Petitioner
- Civil Summons - Commissioner of Insurance

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.

✖ Filing: Contacting TnCIS, please wait...

✖ Filing:
 ✖ Document:

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

✖ Filing:
 ✖ Filing:
 Document:

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

Contacting TnCIS, please wait...

Total Due Amount: \$0.00

Payment Method : Token from:

Total Due Amount: \$331.50

Payment Method : Token from:
 Olivia Benson - LAW OFFICE OF OLIVIA BENSON
 100 Long Hollow Pike
 Murfreesboro, TN 37130
 US

Waive/Defer Fees

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

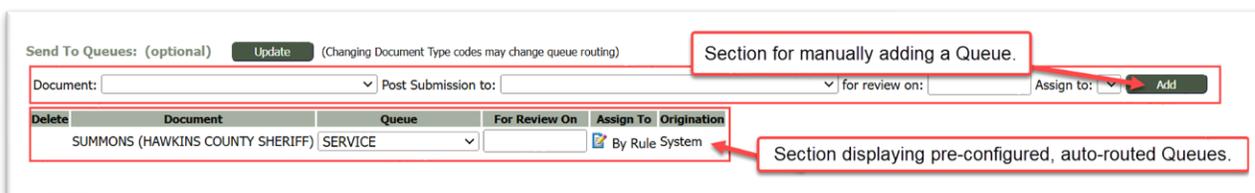
third-party payment vendor to make these arrangements. Click the down-arrow in the **Waive/Defer Fees** field to select a waiver reason when appropriate.

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.



Send To Queues: (optional) (Changing Document Type codes may change queue routing)

Document: Post Submission to: for review on: Assign to:

Delete	Document	Queue	For Review On	Assign To	Origination
	SUMMONS (HAWKINS COUNTY SHERIFF)	SERVICE		<input type="text"/>	By Rule System

#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."

The screenshot shows a document assignment form with the following fields: **Delete**, **Document** (SUMMONS (HAWKINS COUNTY SHERIFF)), **Queue** (SERVICE), **For Review On**, **Assign To** (By Rule System), and **Origination**. A red box highlights the **Assign To** field with the text "Click to assign person." Below the form, a red box contains the text "Clicking the pencil edit icon will expose this pop-up box. Make a selection. Click Save." An arrow points from this box to an **Edit Assigned To** pop-up window. The pop-up window has a **Users** dropdown menu and **Save** and **Cancel** buttons.

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.

The screenshot shows the "Send To Queues" interface. It includes an **Update** button, a warning "Changing Document Type codes may change the queue assignment.", and a text box "Click if any document types were changed." Below this are fields for **Document** (MOTION), **Post Submission to** ((JUDGE) JUDGE OF THE WEEK), **For Review On** (01/27/2025), **Assign to** (Wilson, Howard W), and an **Add** button. A table below shows the resulting queue entry:

Delete	Document	Queue	For Review On	Assigned To	Origination
X	MOTION (JUDGE) JUDGE OF THE WEEK		01/27/2025	Wilson, Howard W Custom	

Annotations include: "Select a Document, Queue name, a deferred date (if desired), and a name to receive the assignment for the task." pointing to the form fields; and "Clicking ADD will move the added queue down to the Queue table. Click 'X' to delete." pointing to the 'X' in the table row.

PROCESS SECTION

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

The screenshot shows a form with two radio buttons: 'Process' and 'Reassign To:'. The 'Reassign To:' radio button is selected, and it is followed by a dropdown menu with a downward arrow.

- 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.

The screenshot shows the 'Approve Filing' form with several fields and instructions highlighted with red boxes and arrows:

- Action Radio Buttons:** A box labeled 'Select an Action Radio Button' points to the 'Process' and 'Reassign To:' radio buttons.
- Note to Judge/Court Staff:** A box labeled 'Use this field when reassigning the filing to another clerk OR to have a message follow the filing into the queues to be seen by clerical or judicial staff there.' points to the 'Note to Judge/Court Staff:' text field.
- Note to Submitter:** A box labeled 'Use this field to message the filer when a filing is rejected so they know what to do differently when resubmitting the filing.' points to the 'Note to Submitter:' text field.
- Approve/Reject Selected Button:** A box labeled 'Click to complete. The button text changes based on the Action taken.' points to the 'Approve/Reject Selected' button.

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.
-
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.

TestRutherfordCM - Windows Internet Explorer
http://saas.tybera.net/tnctis/default.asp

hide menu TestRutherfordCM

Add Civil Case - Add Plaintiff
Enter the required information below. Click Next to continue.

Business Name: [] Phone: []
Individual Name: [] * Address Type: Home []
Doing Business As: (None) [v] Other Information
Social Security Number: [] Law Firm: (None) [v]
Date Of Birth: [] Attorney: (None) [v]
Sex: (None) [v] Attorney is surety
 This is a non-public party Party is indigent
 Deceased Pro Se

Address
Address Type: Home [v]
Street: []
City: []
State: (None) [v]
Zip Code: []

Warnings

This is the mailing address
 This is a foreign address
 This is a non-public address

< Back Next > Cancel

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

Add Civil Case - Add Plaintiff
Enter the required information below. Click Next to continue.

Business Name: [] Phone: []
Individual Name: Esther Williams [] * Address Type: Home [v]
Doing Business As: (None) [v] Other Information
Social Security Number: [] Law Firm: (None) [v]
Date Of Birth: [] Attorney: Kenison, Bonnie [v]
Sex: (None) [v] Attorney is surety
 This is a non-public party Party is indigent
 Deceased Pro Se

Address
Address Type: Home [v]
Street: 6000 Greek Street #4005 [v]
City: Nashville [v]
State: Tennessee [v]
Zip Code: 31214 [v]

Warnings

This is the mailing address
 This is a foreign address
 This is a non-public address

< Back Next > Cancel

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

Add Civil Case - Add Defendant
Enter the required information below. Click Next to continue.

Business Name: [Text Field] **Phone:** [Text Field]
Individual Name: [Text Field] * **Home:** [Dropdown] [Text Field]
Doing Business As: (None) [Dropdown] **Other Information:**
Social Security Number: [Text Field] **Law Firm:** (None) [Dropdown]
Date Of Birth: [Text Field] **Attorney:** (None) [Dropdown]
Sex: (None) [Dropdown] Attorney is surety
 This is a non-public party Party is indigent
 Deceased Pro Se

Address:
Address Type: Home [Dropdown]
Street: [Text Field]
City: [Text Field]
State: (None) [Dropdown]
Zip Code: [Text Field]
 This is the mailing address
 This is a foreign address
 This is a non-public address

Warnings: [Empty Box]

15. Click "Next" again.

Add Civil Case - Parties
Double Click Party to edit. Click Next to continue.

Name	Role	Attorney\Law Firm
Esther Williams	Plaintiff	Bonnie Kenison
Lori Jaspersen	Defendant	

[Add More...] [Remove] [Back] [Next >] [Cancel]

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.

Add Civil Case - Add Filing
Enter the required information. Click Next to continue.

Filing Date: 8/26/2016
Filed By: Bonnie Kenison, Attorney
Filed For: Esther Williams, Plaintiff

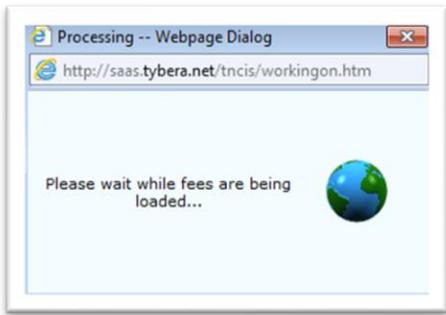
Case Parties	Additional Served On	Additional Hearing For
Lori Jaspersen	<input type="checkbox"/>	<input type="checkbox"/>

Filings	Total Amount Due	Paid Amount	Receipt Amount
+ Additional Fees	\$0.00	\$0.00	\$0.00
+ x (Select one)	\$0.00	\$0.00	\$0.00
Additional Defendant Filing			
AMENDED AND SUPPLEMENTAL COMPLAINT			
Category 1 Lawsuit			
Category 2 Lawsuit			
Category 3 Lawsuit			
Category 4 Lawsuit			
Complaint for Judicial Hospitalization			
Contract/Debt			
Counter Complaint / Cross Filing			
Enforcement of A Foreign Judgment			
Filing to Reopen Case			
Motion Filed			
Notice of Appeal			
Officer Subpoena			
Old Case Filing			
Petition for Modification			
Property Damage			
Property Dispute			
Reopen Civil Case			
Subpoena Filed			
Summons Filed			
Summons Filed - Alias			
Summons Filed - Pluries			
Transfer from Foreign County			
Wage Assignment			
Writs of Mandamus			

Receipt Amount: Total Fee Amount: **\$0.00**
Total Receipt Amount: **\$0.00**

< Back Next > Cancel

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**.

Receipt Amount: Total Fee Amount: **\$357.50**
Total Receipt Amount: **\$357.50**

< Back Next > Cancel

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.

Civil Case Has Been Created
Click the task you wish to perform. Click Close to return to the main menu.

Case Number: **75CH1-2016-CV-29**

Tasks

- Print Case Label
- Add Bond
- Edit Document(s)
- Print Document(s)
- Open Case
- Add Another Case
- Receipting

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.**"

Validate Filing

Total Fees: \$ 357.50 

Payment Method : Token

Waive/Defer Fees --DO NOT WAIVE/DEFER FEES --

Take Payment Skip Payment

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

Validate Filing

Total Fees: \$ 357.50

Payment Method : Token

Waive/Defer Fees --DO NOT WAIVE/DEFER FEES --

Take Payment: Payment Collected: \$357.50 Authorization Code: 6E6512500K313560A

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

Case Type: Contract/Debt

Tracking #	Case No.	Case Title	Court Division	Case Type	Judge	Filed Date	
162	16CV-29		CHANCERY COURT	Contract/Debt		08-26-2016 12:43:56 PM	Refresh

Security View Size Document Type Additional Docket Text Edit Data

Form Data Case Data collected from filer

-- Default -- 0.0 MB PETITION Test 3

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

Case Type: Contract/Debt

Tracking #	Case No.	Case Title	Court Division	Case Type	Judge	Filed Date	
162	16CV-29	Esther Williams vs Lori Jasperson	CHANCERY COURT	Contract/Debt		08-26-2016 12:43:56 PM	Refresh

Security View Size Document Type Additional Docket Text Edit Data

Form Data Case Data collected from filer

-- Default -- 0.0 MB PETITION Test 3

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.

TestRutherfordCM - Windows Internet Explorer

http://saas.tybera.net/tncis/default.asp

TestRutherfordCM Civil Cases

Close New Search Print...

Search by: Case Number 1 - 25 of 29 Prev Next

Case Number: [] Find Now

Case Type: (All)

Case Year: 2016

Case Sub Type: (All)

Court Division: (All)

Open Only

Case Number	Case Sub Type	Filing Date	Status	Status Date	Style of Case
75CH1-2016-CV-29	CD	8/26/2016	Open	8/26/2016	Esther Williams vs Lori Jasperson
75CH1-2016-CV-28	CD	8/26/2016	Open	8/26/2016	James Jones vs Martin Lewis
75CH1-2016-CV-27	CD	8/8/2016	Open	8/8/2016	Mary Martin vs James Jackson
75CH1-2016-CV-26	CD	8/8/2016	Open	8/8/2016	Ann Wilson vs Jack Jones
75CH1-2016-CV-25	CD	8/8/2016	Open	8/8/2016	Mary Johnson vs Tammy Tancis
75CH1-2016-CV-24	CD	8/2/2016	Open	8/2/2016	Jane Smith vs Monica Moore

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

Add Receipt -- Webpage Dialog
 http://saas.tybera.net/tncis/acReceiptWizard.asp

Receipt Type Selection
 Select a batch and the type of receipt. If this is a case receipt, select one or more cases for this receipt. If this is a miscellaneous receipt, select the fee(s) and amount(s) for this receipt. Click Next to continue.

Batch: tn-2/8/2016
 Type: Case
 Receipt Date: 2/8/2016
 Case Number: 75CH1-2016-CV-29
 Party: (Select one)
 Receipt Amount: Lori Jasperson, Defendant
 Esther Williams, Plaintiff

Warnings

Cases

Total Amount Due: **\$0.00**
 Total Receipt Amount: **\$0.00**

< Back Next > Cancel

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

Add Receipt -- Webpage Dialog
 http://saas.tybera.net/tncis/acReceiptWizard.asp

Receipt Type Selection
 Select a batch and the type of receipt. If this is a case receipt, select one or more cases for this receipt. If this is a miscellaneous receipt, select the fee(s) and amount(s) for this receipt. Click Next to continue.

Batch: tn-2/8/2016
 Type: Case
 Receipt Date: 2/8/2016
 Case Number: 75CH1-2016-CV-29
 Party: Esther Williams, Plaintiff
 Receipt Amount: \$357.50

Warnings

Cases

Case Number	Style of Case	Total Amount Due	Total Receipt Amount
<input checked="" type="checkbox"/> ... 75CH1-2016-CV-29	Esther Williams vs Lori Jasperson	\$329.50	\$329.50

Payment Agreement

Total Amount Due: **\$329.50**
 Total Receipt Amount: **\$329.50**

< Back Next Cancel

27. On the next page:
- In the **Receipt Type drop-down**, select **Direct**,
 - In the **Bank Account drop-down**, select **ACCOUNT GENERAL**, and
 - 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**

The screenshot shows a web browser window titled "Add Receipt -- Webpage Dialog" with the URL "http://saas.tybera.net/tncis/acReceiptWizard.asp". The main heading is "Enter Receipt Information". Below this, there is a paragraph of instructions: "Enter the amount tendered for this receipt. Click the Edit icon to add or edit payment methods or banks and choose from the menu. To remove a payment method from this receipt, click the Delete icon of the line to remove. Click Next to continue." The form contains several input fields: "Rule Docket Entry" (empty), "Date:" (8/26/2016), "Time:" (11:35 AM), "Entry:" (Credit Card Payment - Authorization Code: 6E6512500K3135601A), "Notes:" (empty), "Receipt Type:" (Direct), "Bank Account:" (ACCOUNT GENERAL), "Received Of:" (Esther Williams, Plaintiff), "Receipt Date:" (2/8/2016), and "Due Date:" (2/8/2016). There are two checkboxes: "Print this receipt" and "This is a manual receipt". At the bottom right, there are three buttons: "< Back", "Next >", and "Cancel".

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.

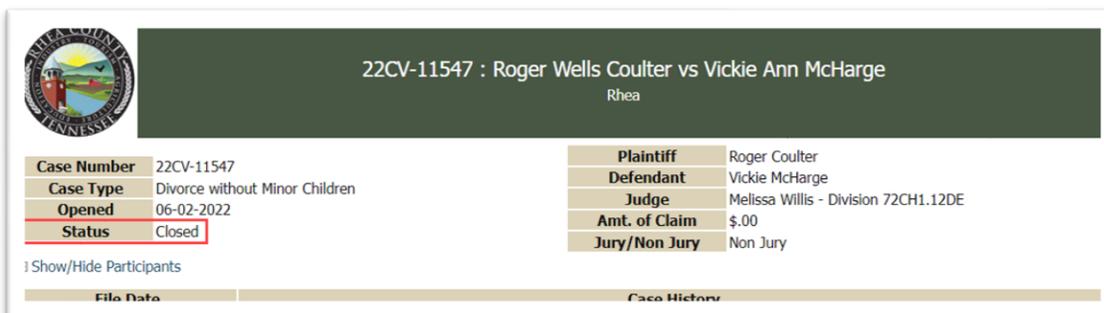
Note: The number in parentheses next to the **Approve Filings** button displays the number of filings awaiting approval.

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.



22CV-11547 : Roger Wells Coulter vs Vickie Ann McHarge Rhea	
Case Number	22CV-11547
Case Type	Divorce without Minor Children
Opened	06-02-2022
Status	Closed
Plaintiff	Roger Coulter
Defendant	Vickie McHarge
Judge	Melissa Willis - Division 72CH1.12DE
Amt. of Claim	\$.00
Jury/Non Jury	Non Jury

1 Show/Hide Participants

File Date Case History

- 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.

Approve Filing

Filer: [Olivia Benson](#) Organization: LAW OFFICE OF OLIVIA BENSON

Note From Filer: None

Note from Court: None

Note History None

Case is currently Disposed. Would you like to file to existing case detail or reopen with a new case type?

Existing Case Detail New Case Type ← Select the appropriate option

Case Type: Civil

Tracking #	Case No.	Case Title	Court Division	Case Type	Judge
7166	21CV-64121	Mavis Olivia Gambill vs Ben Hill Gambill	CIRCUIT CIVIL	Civil	Special Judge

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.

Existing Case Detail New Case Type

--Select Case Detail-- Set Case Detail

--Select Case Detail--

Closed - 02/25/2021 - Civil Civil - Petition To Modify - 02/25/2021

- 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.

Existing Case Detail New Case Type

--Select Case Types-- Set Case Type

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

Case is currently Disposed. Would you like to file to existing case detail or reopen with a new case type?

Existing Case Detail New Case Type

Case Type: Civil

Tracking #	Case No.	Case Title	Court Division	Case Type	Judge
7167	21CV-64121	Mavis Olivia Gambill vs Ben Hill Gambill	CIRCUIT CIVIL	Civil	Special Judge

Approve	Reject	Security	View	Size	Document Type
<input checked="" type="radio"/>	<input type="radio"/>			0.18 MB	Form Data
<input checked="" type="radio"/>	<input type="radio"/>	Public		0.18 MB	EXHPLG : EXHIBITS WITH PLEADING

Case Data colle

Unselectable

Add TnCIS Filing Validate Fees Validate Filing

Total Fees: \$0.00

Case is currently Disposed. Would you like to file to existing case detail or reopen with a new case type?

Existing Case Detail New Case Type

Closed - 02/25/2021 - Civil Civil - Petition To Modify - 02/25/2021

Case Type: Civil

Tracking #	Case No.	Case Title	Court Division	Case Type	Judge
7167	21CV-64121	Mavis Olivia Gambill vs Ben Hill Gambill	CIRCUIT CIVIL	Civil	Special Judg

Approve	Reject	Security	View	Size	Document Type
<input checked="" type="radio"/>	<input type="radio"/>			0.18 MB	Form Data
<input checked="" type="radio"/>	<input type="radio"/>	Public		0.18 MB	EXHPLG : EXHIBITS WITH PLEADING

Case Data coll

Selectable

Add TnCIS Filing Validate Fees Validate Filing

Total Fees: \$0.00

- 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.

The screenshot shows a web interface for filing a document. At the top, there are radio buttons for 'Filing For' and 'Filing Against', and checkboxes for 'Additional Served On' and 'Additional Hearing For'. Below these are two rows of participant names: 'EMILY RONALD, Plaintiff' and 'WILLIAM WRIGHT, Defendant'. A dropdown menu shows 'Filing: Petition for Modification' with an 'Add Document' button. Below this is a table with columns: 'Filing', 'Fee Description', 'Fee Distribution', and 'Total Assessed'. The first row contains 'Petition for Modification', 'CV Certified Mail', 'CV Certified Mail', and an empty input field. A red arrow points to this input field. Below the table is another table with columns: 'Filing', 'Hearing Type', 'Hearing Date', 'Hearing Time', 'Hearing Judge', and 'Courtroom'. The first row contains 'Petition for Modification', 'Hearing', an empty date field, '11:00 AM', '--Select Hearing Judge--', and '--Select Courtroom--'. At the bottom, there are three buttons: 'Add TnCIS Filing', 'Validate Fees', and 'Validate Filing'. At the very bottom, it says 'Total Due Amount: \$77.00' with a red arrow pointing to it.

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

This screenshot is similar to the previous one, but the 'Total Assessed' input field now contains the number '10', which is highlighted with a red box and a red arrow. The 'Total Due Amount' at the bottom has updated to '\$87.00', also highlighted with a red box and a red arrow. All other elements in the interface remain the same.

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.

Filing	Fee Description	Fee Distribution	Total Assessed
Petition for Modification	CV Certified Mail	CV Certified Mail	5

Filing	Hearing Type	Hearing Date	Hearing Time	Hearing Judge	Courtroom
Petition for Modification	Hearing	03/20/2023	11:00 AM	George H HENLEY	Courtroom # 303

Total Due Amount: \$82.00

- 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.

Security	View	Size	Document Type	Additional Docket Text	Edit Data
Public		0.0 MB	PROBATE AFFIDAVIT OF SMALL ESTATE	Case Data collected from filer	

Probate

Estate Type: --Select Estate Type--

Amount of Estate:

Estate Open Date:

Estate Close Date:

Estate Status: --Select Estate Status--

Estate Status Date:

Estate Status Comments:

Total Due Amount: \$0.00

Probate

Estate Type:

Amount of Estate:

Estate Open Date:

Estate Close Date:

Estate Status:

Estate Status Date:

Estate Status Comments:

- 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*.

Estate Open Date:

Estate Close Date:

Estate Status:

Estate Status Date:

Estate Status Comments:

Filing For	Filing Against	Additional Served On	Additional Hearing For	Participant Name
<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	EMILY RONALD, Decedent
<input checked="" type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	KENNETH O PARKER, Claimant
<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	WILLIAM WRIGHT, Defendant

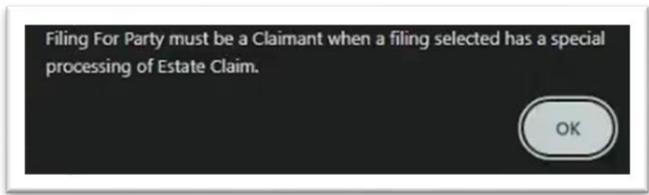
✖ Filing:

Add TnCIS Filing **Validate Fees** **Validate Filing**

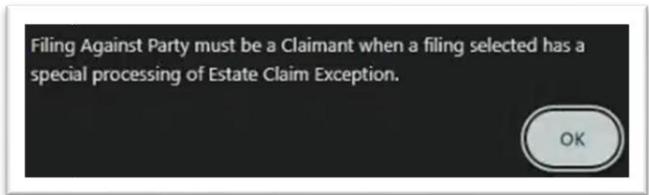
Total Due Amount: \$0.00

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

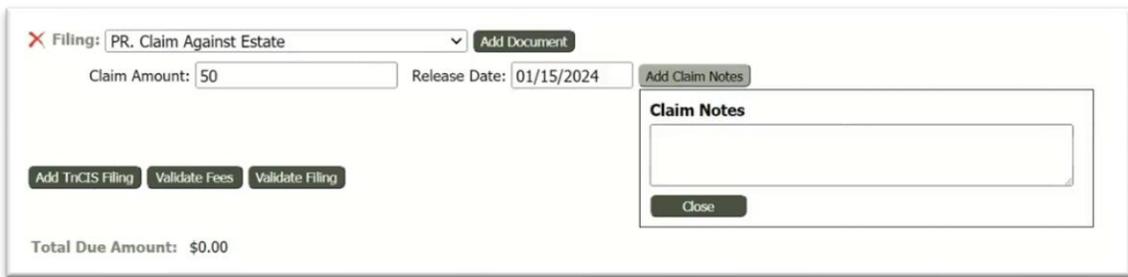


3) Click **Select Filing Type** and search through the drop-down menu to choose the applicable filing. The filings in this list are populated from TnCIS.

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.

Filing For	Filing Against	Additional Served On	Additional Hearing For	Participant Name
<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	EMILY RONALD, Decedent
<input checked="" type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	KENNETH O PARKER, Claimant
<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	WILLIAM WRIGHT, Defendant

X Filing: PR. Affidavit For Small Estate

X Filing: PR. Claim Against Estate

Claim Amount: Release Date:

Total Due Amount: \$161.50

- 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**.

Tracking #	Case No.	Case Title	Court Division	Case Type	Judge	Filed Date
3167	24PR-1	The Estate of : EMILY RONALD	Chancery Court	Small Estate	Louis Oliver, III	01-08-2024 11:01:25 AM

Security	View	Size	Document Type	Additional Docket Text	Edit Data
Public		0.0 MB	NOTICE	Case Data collected from filer	

Filing For	Filing Against	Additional Served On	Additional Hearing For	Participant Name
<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	EMILY RONALD, Decedent
<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	KENNETH PARKER, Claimant
<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	WILLIAM WRIGHT, Defendant

X Filing: Publication/Notice To Creditor Add Document

Add TnCIS Filing
Validate Fees
Validate Filing

Total Due Amount: \$0.00

- 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**.

X Filing: Publication/Notice To Creditor Add Document
 X Document: Probate Notice To Creditors --Select Party Served-- --Select Service Agency-- Additional Info

Additional Info

Additional Info

Issued By:

Publication: --Select Publication--

From Date:

Thru Date:

Notes:

Close

Publication: --Select Publication--

From Date:

Thru Date:

Notes:

Close

--Select Publication--

Gallatin Newspaper

Hendersonville Standard

News Examiner

Portland Leader

Portland Sun

Star News

White House Connection

Additional Info

Additional Info

Issued By:

Publication:

From Date:

Thru Date:

Notes:

- 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.

Filing For	Filing Against	Additional Served On	Additional Hearing For	Participant Name
<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	EMILY RONALD, Decedent
<input checked="" type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	KENNETH PARKER, Claimant
<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	WILLIAM WRIGHT, Defendant

✗ Filing:

✗ Document:

Filing	Fee Description	Fee Distribution	Total Assessed
Publication/Notice To Creditor	Publication/Notice to Creditors	Publication/Notice to Creditors	<input type="text" value="10"/>

Total Due Amount: \$10.00

- 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**.

3105 24PK-1 The Estate of : EMILY RONALD Chancery Court Small Estate LOUIS OLIVER, III 01-08-2024 11:09:40 AM

Security	View	Size	Document Type	Additional Docket Text	Edit Data
Public		0.0 MB	WAGE GARNISHMENT		

Form Data Case Data collected from filer

Add Certificate Multiple Certificates

Filing For	Filing Against	Additional Served On	Additional Hearing For	Participant Name
<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	EMILY RONALD, Decedent
<input checked="" type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	KENNETH PARKER, Claimant
<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	WILLIAM WRIGHT, Defendant

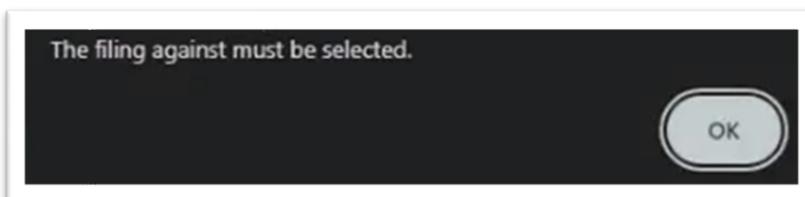
X Filing: Wage Garnishment Add Document

Document Wage Garnishment WILLIAM WRIGHT, Defendant Sumner County Sheriff's Office Additional Info

Add TnCIS Filing Validate Fees Validate Filing

Total Due Amount: \$0.00

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**.

The screenshot shows a software dialog box titled "Additional Info". Inside the dialog, there is a section header "Additional Info". Below this, there are two dropdown menus. The first is labeled "Employer:" and has "--Select Employer--" as its current selection. The second is labeled "Notes:" and is currently open, displaying a list of options. The option "A & M Auto Sales (WILLIAM WRIGHT)" is highlighted in blue, indicating it is the selected item. A mouse cursor is visible over this option. At the bottom left of the dialog, there is a "Close" button.

- 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**.

Case Type: Small Estate

Tracking #	Case No.	Case Title	Court Division	Case Type	Judge	Filed Date
3169	24PR-1	The Estate of : EMILY RONALD	Chancery Court	Small Estate	Louis Oliver, III	01-08-2024 11:13:55 AM

Security	View	Size	Document Type	Additional Docket Text	Edit Data
Public		0.0 MB	Form Data	Case Data collected from filer	
			LEVY ON BANK		

Filing For	Filing Against	Additional Served On	Additional Hearing For	Participant Name
<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	EMILY RONALD, Decedent
<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	KENNETH PARKER, Claimant
<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	WILLIAM WRIGHT, Defendant

X Filing: --Select Filing Type--

Add TnCIS Filing Validate Fees Validate Filing

Total Due Amount: \$0.00

Filing For	Filing Against	Additional Served On	Additional Hearing For	Participant Name
<input checked="" type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	EMILY RONALD, Decedent
<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	KENNETH PARKER, Claimant
<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	WILLIAM WRIGHT, Defendant

X Filing: Levy on Bank **Add Document**

Document: Levy on Bank WILLIAM WRIGHT, Defendant Sumner County Sheriff's Office **Additional Info**

Add TnCIS Filing Validate Fees Validate Filing

Total Due Amount: \$0.00

- 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).

Additional Info

Additional Info

Notes:

Close

- 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.

Approve Filing

Filer: Brian Taylor Organization: [Organization Name]

Note From Filer: None

Note from Court: Amy Gifford - Because of vacation schedules we made adjustments to some filing assignments.

Note History

Date	From	To	Message
2021-03-31	Amy Gifford	Lori Finch	Because of vacation schedules we made adjustments to some filing assignments.

Messages sent from the *Assign Filings to a User for Approval* Page are displayed in the Note Section on the *Approve Filing*

Sender of the Note: Amy Gifford

Message sent to the staff member: Lori Finch

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

Assign Filings to a User for Approval - Number of filings: 153

RUTHERFORD CHANCERY COURT

Assign an Individual to Approve Filings

View Filings Between: [] AND []

Tracking #: [] Filer ID: [] Case #: [] Filer Name: [] Client #: []

Go Clear Search

Assign Selected Filings To: Finch, Lori

Assign

Please review these filings as Joanna is out sick today. Thank you.

Refresh

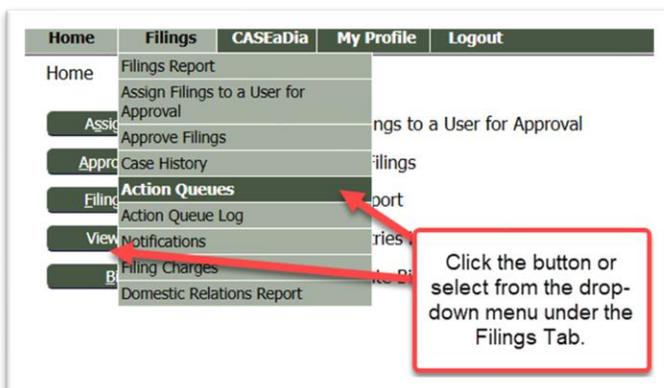
Show me Filings assigned to: Everyone

1 2 3 4 >Next

<input type="checkbox"/>	Tracking #	Filer ID	Assigned To	Official File Stamp	Document	Case Type	Case Number	Case Title
<input type="checkbox"/>	7675	10122	Raechelle Wilson	01-27-2025 01:57:48 PM	ORDER (PROPOSED)	Divorce without Minor Children	24CV-6	JAMES SMITH vs JANE SMITH
<input checked="" type="checkbox"/>	7650	10110	Joanna Riggs	01-24-2025 01:53:16 PM	ORDER	Order of Protection	25CV-1	Suzy Smith vs John Smith
<input checked="" type="checkbox"/>	7660	10070	Joanna Riggs	01-24-2025 11:06:36 AM	ORDER	Divorce without Minor Children	24CV-8	VICTOR JONES vs CAMILA FREDRICK
<input type="checkbox"/>	7657	10103	Shannon Brown	01-23-2025 11:15:10 AM	NARRATIVE-ORDER OF PROTECTION	Order of Protection		
<input checked="" type="checkbox"/>	7651	10069	Joanna Riggs	01-22-2025 11:03:18 AM	ORDER	Divorce without Minor Children	24CV-8	VICTOR JONES vs CAMILA FREDRICK
<input type="checkbox"/>	7634	10071	Raechelle Wilson	01-17-2025 08:50:46 AM	ANSWER	Divorce without Minor Children	24CV-7	TOM JOHNSON vs ASHLEY A JOHNSON

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.



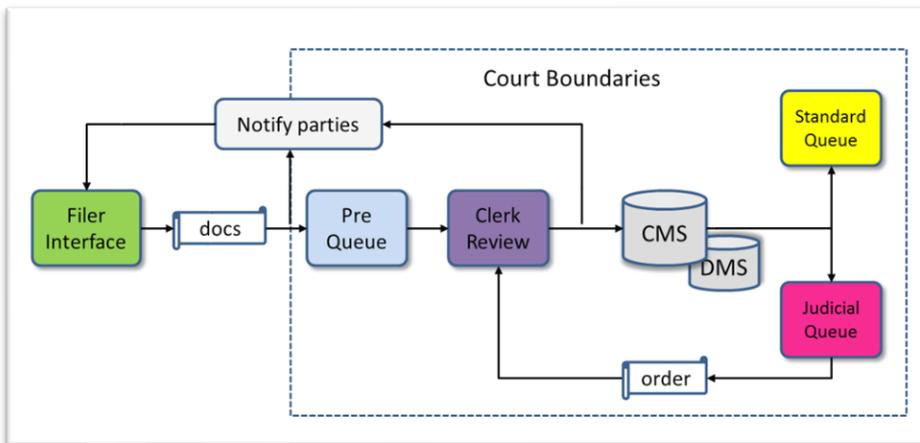
- The **Action Queue** log is accessed by selecting it from the drop-down menu under the **Filings** tab. This page records all queue entries that have been completed. A user may search its records using the filtering fields to locate a specific queue entry.

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 System).
4. 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 order 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 simply 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

My Queue Entries

RUTHERFORD CHANCERY COURT

Filter By View Entries in: All Queues Assigned To: All Users Review Date: Today's Items

Show only Case Type: All Case Types

Search By: All

Go Clear Search

Reassign Selected Entries To: Unassigned Reassign Queue Entry(s)

Click "Go" to initiate the search.

This section shows the fields used for filtering information that will display in the Queues Data Table. Use the drop-down arrows in the fields to view the selections available.

Number of entries displayed per page: 50

Queue Entry Id	Queue	Title	Case Title	Case Number	Tracking #	Days In Queue	Original Filer	Assigned To	Assigned By	Division Number	Judge	Magistrate	Deferred Date	Restore
3143	Sheriff Queue - Rutherford Co	SUMMONS (RUTHERFORD CO)	TOM JOHNSON vs ASHLEY A. JOHNSON	24CV-7	7696	1	Barbie Morgan			75CH1.16DC	HOWARD WILSON			
3142							Barbie Morgan			75CH1.16DC	HOWARD WILSON			
3139							Bonnie Kenison			75CH1.16DC	HOWARD WILSON			
3138	Sheriff Queue - Rutherford Co	(RUTHERFORD CO) Test Approver Sig	JAMES SMITH vs JANE SMITH	24CV-6	7667	4	Bonnie Kenison			75CH1.16MD	J Roge			
3126	Test Pre-Queue	ANSWER answer	TOM JOHNSON vs ASHLEY A. JOHNSON	24CV-7	7630	12	Barbie Morgan	Raechelle Wilson	Brittney Morgan	75CH1.16DC	HOWARD WILSON		2025-01-24	
3083	(JUDGE) PROPOSED ORDERS	ORDER (PROPOSED)	VICTOR JONES vs CAMILA	24CV-8	7547	18	Bonnie Kenison	Raechelle Wilson	Brittney Morgan	75CH1.16DC	HOWARD WILSON		2025-01-24	

Each column header has an ascending/descending sort feature. Click a Header Title and control the order of the listings with the up/down arrow. The default column is the Days in Queue with the newest entries at the top.

Future, deferred Queue Entries will not display until the set day - UNLESS the Review Date field at the top is set to ALL.

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.

Review Date: Today's Items ▾

- All
- Today's Items
- Week

of entries displayed per page: 50 ▾

Division Number	Judge	Magistrate	Deferred Date	Restore
-----------------	-------	------------	---------------	---------

- 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

RUTHERFORD CHANCERY COURT

Filter By View Entries in: All Queues

Show only Case Type: All Case Types ▾

Search By: All ▾

Go

- All
- Queue Entry Id
- Title
- Case Title
- Case Number
- Tracking #
- Original Filer
- Assigned To
- Division Number

Reassign Se

Queue E

3143

This secondary field is where one enters the information identified from the selection made from the first Search by field.

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.

Filter By View Entries in: All Queues
 Show only Case Type: All Case Types
 Search By: All
 Go Clear Search
 Add Queue Entry

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

Add Queue Entry
 Identify Case
 Case Number [Redacted] Court Division CHANCERY COURT
 Search
 Cancel Add Queue Entry

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.

Add Queue Entry
 Identify Case
 Case Number 24CV-7 Court Division CHANCERY COURT
 The Case # along with the Case Title will display.
 Add Queue Entry - 24CV-7 : TOM JOHNSON vs ASHLEY A. JOHNSON
 Queue Document Type
 (JUDGE) JUDGE OF THE WEEK
 Click the Queue field to select inside which Judicial Queue the new Queue Entry will be created.
 Cancel Add Queue Entry

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**.

Add Queue Entry - 24CV-7 : TOM JOHNSON vs ASHLEY A. JOHNSON

Queue	Document Type
(JUDGE) JUDGE OF THE WEEK	order :
	AMORDER : AMENDED ORDER
	CLERKORDER : CLERK PREPARED ORDER
	DENIEDORDER : DENIED-ORDER
	JUDGEORDER : JUDGE PREPARED ORDER
	ORDER : ORDER
	PROTORDER : PROTECTIVE ORDER

Buttons: Cancel, Add Queue Entry

Callout 1: Click on your selection from the system-filtered list.

Callout 2: Click "Add Queue Entry" to proceed

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**.

Judicial Queue Entry - (JUDGE) JUDGE OF THE WEEK

*Required Fields

Description: JUDGE PREPARED ORDER

File: * Choose File NC Civil Order 2.doc

Buttons: Close, 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.

[My Queue Entries](#) ⇒ Standard Queue - Sheriff Queue - Rutherford Co

Standard Queue - Sheriff Queue - Rutherford Co

Case Number: 24CV-6
Case Title: JAMES SMITH vs JANE SMITH
Case Type: Divorce without Minor Children
Opened: 06-14-2024
Case History: [Full Case History](#)

Plaintiff: JAMES SMITH
Defendant: JANE SMITH
Judge: J Rogers
Amt. of Claim:
Jury/Non Jury: Non-Jury
Service List: [Service List](#)

Document Information

Document Link	Document	Entry Date
generated.pdf	SUMMONS (RUTHERFORD CO) Test Approver Sig	01-24-2025

Other Pending Actions - Case Number 24CV-6

Title	Original Filer	Entry Date	Assigned To
FINAL DECREE OF DIVORCE (PROPOSED)	Bonnie Kenison	12-11-2024	

Note from Filer: None
Note from Court: Brittney Morgan - Self-assigned filing

Note History

Date	From	To	Note
2025-01-24	Brittney Morgan	Brittney Morgan	Self-assigned filing

Add Note: Add Standard Text: [Select Predefined Note](#) [Save Note](#)

Queue: [-- Same Queue --](#) Reassign To: [Unassign](#) Date Defe

[Back](#) [Delete](#) [Complete](#) [Reassign](#)

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.

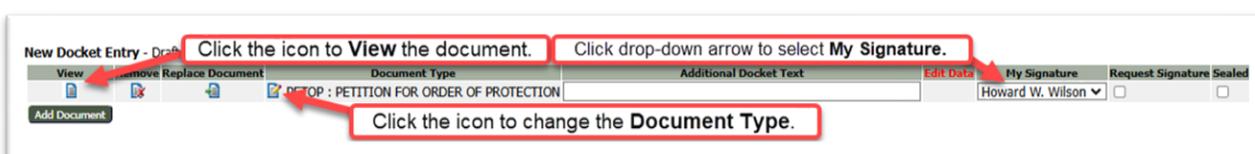
The screenshot displays the 'Judicial Queue Entry' page for a case titled 'CHANCERY COURT Suzy Smith vs John Smith Order of Protection'. The page is annotated with red boxes and arrows pointing to various sections:

- Case Information Section:** Points to the top header area containing case details like Case Number (25CV-1), Court Division, Case Title, Case Type, Opened Date, and Judge (HOWARD WILSON).
- Other Filings Awaiting Approval on the same case:** Points to a table listing related filings with columns for Document, Entry Date, and Assigned To.
- Other Queue Entries associated to the same case:** Points to a table for 'Other Pending Actions' with columns for Title, Original Filer, and Entry Date.
- Documents in the Filing:** Points to a table showing document details such as Document, Entry Date, and Assigned To.
- Note Section:** Points to the 'Note from Filer' and 'Note to Judge/Court Staff' text input areas.
- This NEW DOCKET ENTRY Section is what distinguishes this Queue from the Standard Queue. A document in this section can be signed and issued by the court.** Points to the 'New Docket Entry' section, which includes a document type dropdown (PETOP), additional docket text, and signature options.
- Reassign Section & Action Buttons:** Points to the bottom of the page containing radio buttons for actions like 'Sign and Submit Document', 'Process Unsigned', and 'Decline to Take Action', along with a 'Reassign Queue' dropdown and 'To:' field.

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.

Document Information

Document	Entry Date
PETITION FOR ORDER OF PROTECTION AND ORDER FOR HEARING (PROPOSED)_TEST	01-07-2025

New Docket Entry - Draft Filer ID:

Use Filer's Document

OR

Include Document No file chosen

Other Code AMENDED ORDER

Docket Text

1. Click to select a document provided by the filer.

2. Click to browse computer to select a document.

Optional field to change document type.

Either option requires clicking ADD.

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.

New Docket Entry

Use Filer's Document

OR

Include Document No file selected.

Other Code ACCOUNTING

Docket Text

Note from Filer: Please file and return to our office for service.
Note from Court: None
Note History: None

Only use "Include Document" field if you have the document saved to your computer and want to upload it.

Otherwise, choose the "Use Filer's Document" field to add the document the filer submitted that was not automatically routed to this queue entry.

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."

New Docket Entry

Use Filer's Document CHILD SUPPORT MOTION AND ORDER TO SHOW CAUSE (PROPOSED) MOTION AND ORDER TO SHOW CAUSE

OR

Include Document No file selected.

Other Code ACCOUNTING

Docket Text CHILD SUPPORT ADMINISTRATIVE ORDER

Note from Filer: Please file
Note from Court: None
Note History: None

Match the original document type the filer selected, but use the official order document type and not the (Proposed) document type.

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

Document Information - Assigned To Chelsea Brewer		
Document	Entry Date	Assigned
CHILD SUPPORT MOTION AND ORDER TO SHOW CAUSE (PROPOSED) MOTION AND ORDER TO SHOW CAUSE	04-02-2024	Chelsea Brewer

New Docket Entry

Use Filer's Document: CHILD SUPPORT MOTION AND ORDER TO SHOW CAUSE (PROPOSED) MOTION AND ORDER TO SHOW CAUSE

OR

Include Document: Browse... No file selected.

Other Code: CHILD SUPPORT MOTION AND ORDER TO SHOW CAUSE

Docket Text: MOTION AND ORDER TO SHOW CAUSE Add

Note from Filer: Please file and return to our office for service.
 Note from Court: None
 Note History: None

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

New Docket Entry								
View	Remove	Replace Document	Document Type	Additional Docket Text	Edit Data	My Signature	Request Signature	Sealed
			ORDER : ORDER	Motion (with Order) to Direct Clerk and Master to Issue Writ of .		Test Signature	<input type="checkbox"/>	<input type="checkbox"/>

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.

Replace Document

*Required Fields

Description: PROTECTIVE ORDER- PETITION FOR CONTEMPT WITH ORDER TO APPEAR

File: * Choose File No file chosen

Cancel Replace Document

- 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).

The screenshot shows the 'Action:' section of a web form. It contains four radio buttons: 'Sign and Submit Document', 'Process Unsigned', 'Decline to Take Action', and 'Remove from Queue'. To the right of these is a dropdown menu for 'Reassign Queue' with 'Same Queue' selected, followed by a 'To:' dropdown and a 'Date Deferred' text input field. Below these elements are two buttons: 'Back' and 'Sign/Remove/Reassign'. A red arrow points to the 'Sign/Remove/Reassign' button.

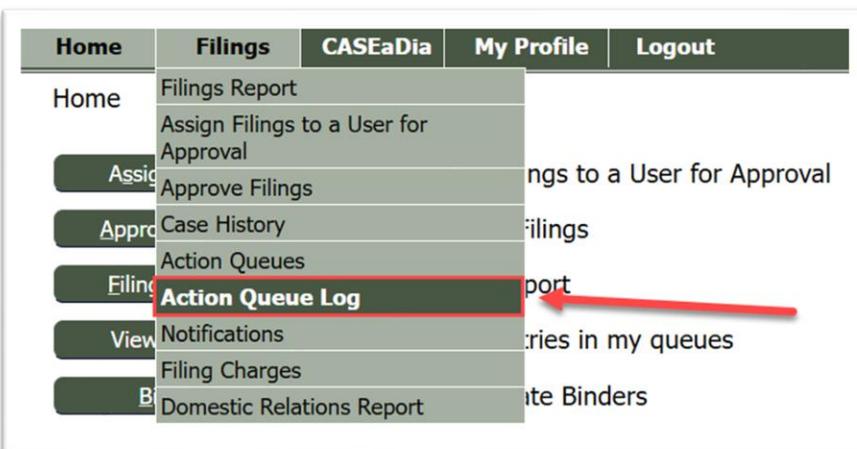
Note: The **Action Section** will state **Submit Document** instead of **Sign and Submit Document** if the document is not configured to be signed.

Action:

Submit Document Process Unsigned

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.

Action Queue Log

RUTHERFORD CHANCERY COURT

View Entries in: Assigned To: View Filings Between: AND

Search By:

Number of entries displayed per page:

Queue Entry Id	Tracking #	Queue	Title	Case Title	Case Number	Original Filer	Action	Action By	Official File Stamp	Division Number	Reinstate
2933	7175	Sheriff Queue - Rutherford Co	SUMMONS (RUTHERFORD	VICTOR JONES vs CAMILA			Completed	Brittney Morgan	01-28-2025	75CH1.16DC	<input type="button" value="Reinstate"/>
2926	7150	Sheriff Queue - Rutherford Co	SUMMONS (RUTHERFORD on Defendant				Completed	Brittney Morgan	01-28-2025	75CH1.16DC	<input type="button" value="Reinstate"/>
2884	6971	Sheriff Queue - Rutherford Co	SUMMONS (RUTHERFORD CO) Defer Payment	VICTOR JONES vs CAMILA FREDRICK	24CV-8	Bonnie Kenison	Completed	Brittney Morgan	01-28-2025	75CH1.16DC	<input type="button" value="Reinstate"/>

Click on a column header to use the ascending/descending sort feature.

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**.

<input type="checkbox"/>	Queue Entry Id	Queue	Title	Case Title	Case Number
		(JUDGE) ED ORDERS	JUDGE PREPARED ORDER	Suzy Smith vs John Smith	25CV-1
<input type="checkbox"/>	3083	(JUDGE) PROPOSED ORDERS	ORDER (PROPOSED)	VICTOR JONES vs CAMILA FREDRICK	24CV-8

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.

Other Pending Actions - Case Number 19-0254

Title

[Motion to Continue Formal Hearing](#)

[Motion to Compel](#)

Add Queue Entry

Document Information - Assigned To Donna Henderson

Document

[Motion to Compel](#)

[Proposed Order to Compel](#)

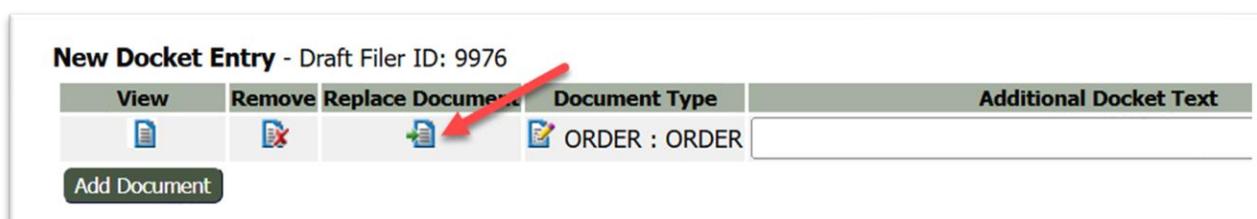
New Docket Entry

View Remove Replace Document Document

[View](#) [Remove](#) [Replace](#) [Document](#) MOTCOMPEL : M...

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.

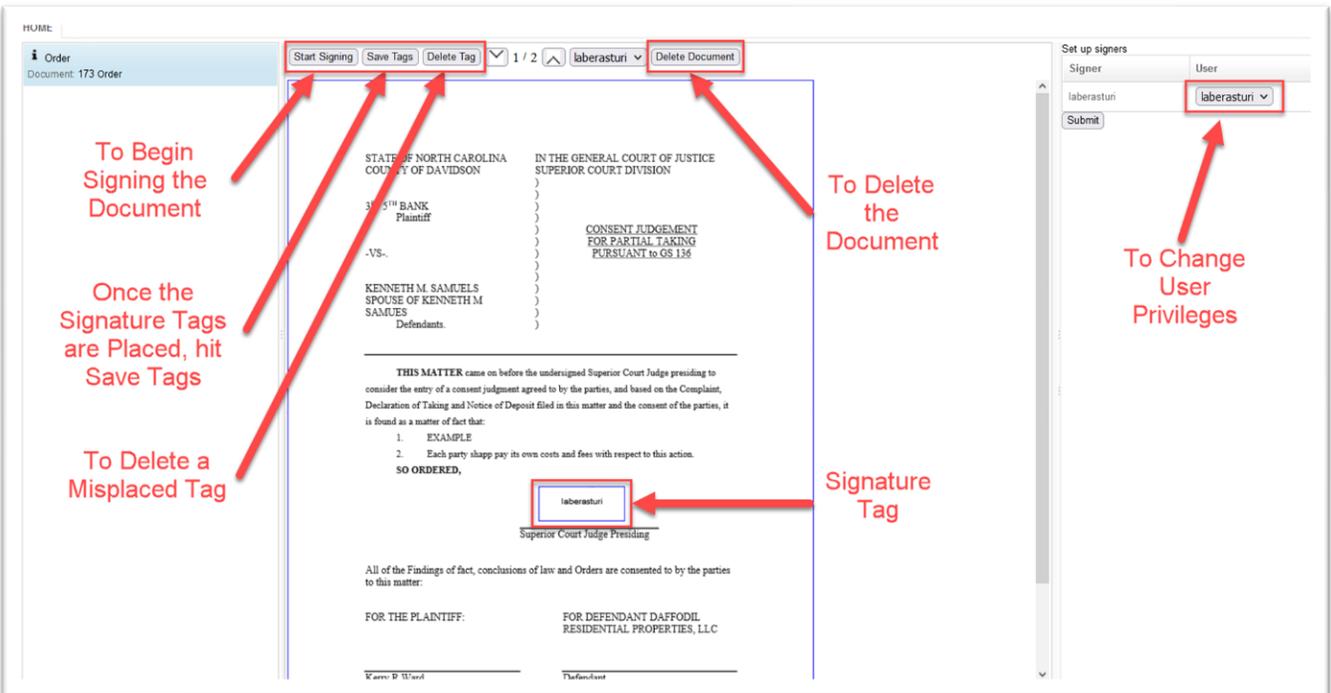
1. Drop a **Signature Tag** on the page at the appropriate location by left-clicking on your mouse. Click and drag the signature tag to the desired location. Use the lower right-hand corner of the signature tag to adjust the signature size. The tag will be highlighted green when it is selected. Clicking 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.

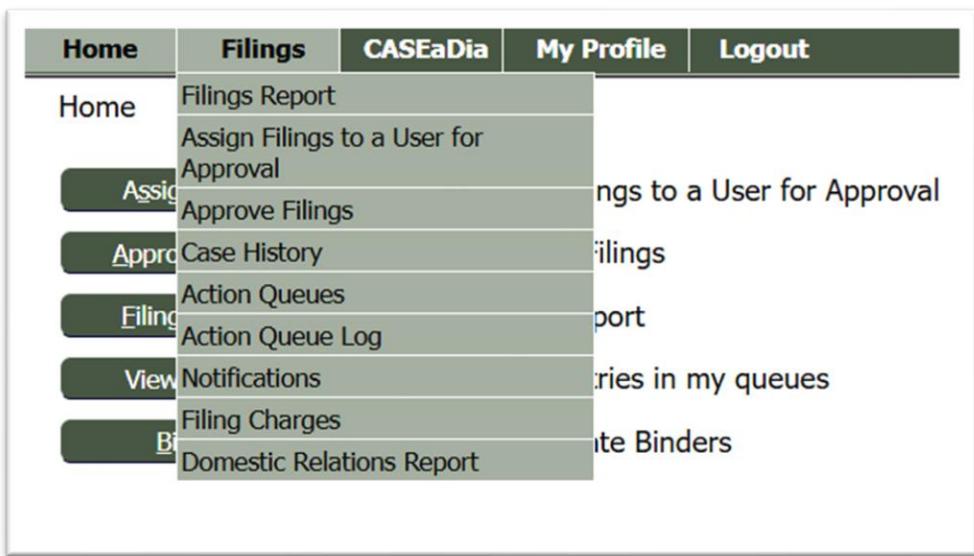
Cannot view case while in eSignature

To retrieve the document from eSignature before signing

Case Entry Id	Queue	Title	Case Title	Case Number	Tracking #	Days In Queue	Original Filer	Assigned To	Division Number	Deferred Date
109	Proposed Orders	Order	STATE OF NEVADA VS UNKNOWN	21-CR-1015	0	0	laberasturi	Leon Aberasturi		Restore



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.

Cases

Court: RUTHERFORD CHANCERY COURT

Enter a Case # and Court Division

Case Number	Court Division
<input type="text"/>	<input type="text"/>

History Service List

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.

Notifications

Notifications
RUTHERFORD CHANCERY COURT

View Filings Between: 01/01/2025 AND 01/28/2025

Search By: All

Click Go to initiate search. Use Clear Search to refresh fields.

Search fields allow the user to filter the information displayed in the data table.

Click on the hyperlink Document title to view the NEF sent.

Notifications per page: 50

ID	Tracking #	Description	Case Title	Case Number	Court Division	Date
6465	7700	ORDER TO SET/RE-SET (PROPOSED)	JAMES SMITH vs JANE SMITH	24CV-6	CHANCERY COURT	01-28-2025
6464	7699	ORDER	JAMES SMITH vs JANE SMITH	24CV-6	CHANCERY COURT	01-28-2025
6461	7696	SUBPOENA (RUTHERFORD CO SHERIFF)	TOM JOHNSON vs ASHLEY A. JOHNSON	24CV-7	CHANCERY COURT	01-27-2025
6445	7675	ORDER (PROPOSED)	JAMES SMITH vs JANE SMITH	24CV-6	CHANCERY COURT	01-27-2025
6438	7668	SUMMONS (RUTHERFORD CO)	CAMILA FREDRICK	24CV-8	CHANCERY COURT	01-24-2025
6437	7667	SUMMONS (RUTHERFORD CO)	JANE SMITH	24CV-6	CHANCERY COURT	01-24-2025
6435	7665	ORDER	in Smith	25CV-1	CHANCERY COURT	01-24-2025
6431	7660	ORDER	CAMILA FREDRICK	24CV-8	CHANCERY COURT	01-24-2025
6426	7651	ORDER	VICTOR JONES vs CAMILA FREDRICK	24CV-8	CHANCERY COURT	01-22-2025
6415	7634	ANSWER	TOM JOHNSON vs ASHLEY A. JOHNSON	24CV-7	CHANCERY COURT	01-17-2025
6414	7633	ORDER	VICTOR JONES vs CAMILA FREDRICK	24CV-8	CHANCERY COURT	01-16-2025

- **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.

View Filings Between: 01/01/2025 AND 01/28/2025

Search By: All

Go

- All
- Notification ID
- Tracking #
- Description
- Case Title
- Case Number
- Court Division
- Sent To

ID	Trac	Description
6465 770		SET/RE-SET (PROPOSED)
6464 769		
6461 769		(RUTHERFORD CO SHERIFF)
6445 767		OPOSED)

- 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

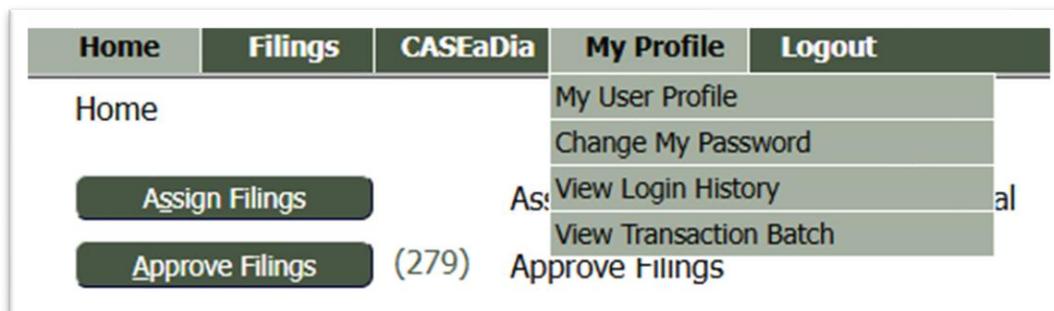
Filed By: Barbie Morgan

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.

User Profile

Shannon Brown

User Name: shannon
Organization: RUTHERFORD CHANCERY COURT
Role: Clerk
Bar Number:
User Identifier: shannon
Transaction Account:
Phone:
Fax:
E-Mail: test@test.com
1st Alternate EMail:
2nd Alternate EMail:
Address: 20 Public Square North
Suite 302
Murfreesboro, TN 37130
US
Role: Clerk
Court Divisions: All Court Divisions
Case Categories: All Case Categories
Date Approved: Not Available
Expiration Date:
Lockout Date:
Gatekeeper(s): None
View Ids: U-75.16CF, U-75.16CR

Changes are made to one's Profile through these buttons.

Modify User Profile
Change Password
Upload Signature
Select Gatekeeper

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 screenshot shows the 'Change Password' form. At the top left is the title 'Change Password'. To the right, a red box contains the text 'Enter Current Password' with a red arrow pointing down to the 'Password:' input field. Below this is a dark grey banner with white text: 'Your password must be at least 8 characters long, must contain a number, and must be different than your user name.' Below the banner are two input fields: 'New Password:' and 'Confirm New Password:', both with red boxes around them. A red box at the bottom right contains the text 'Enter NEW Password in both fields.' with a red arrow pointing up to the 'Confirm New Password:' field. At the bottom left are two buttons: 'Cancel' and 'Submit'.

- 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

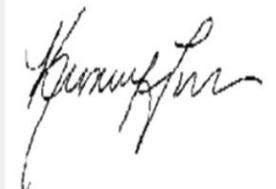
- Click the button **Upload Signature** to be directed to the **Upload Signature** page.

Upload Signature

Kristin G. Farmer

Multiple purposes can be defined with the same signature.

Current Signature(s):

	Primary Signature	Description	Changes Doc Date	Closing	Signature Text	Signature Image	Signature Line
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Judge Farmer's Signature	No				Judge Kristin G. Farmer

Remove Signature Update Primary Signature

Upload a signature from a file:

Primary Signature:

Description: *

Applying Signature Changes Document Date:

Signature Closing:

Signature Text:

Signature File:

Signature Line:

Signature must be a .bmp, .gif, .jpg, .jpeg, or .png file.

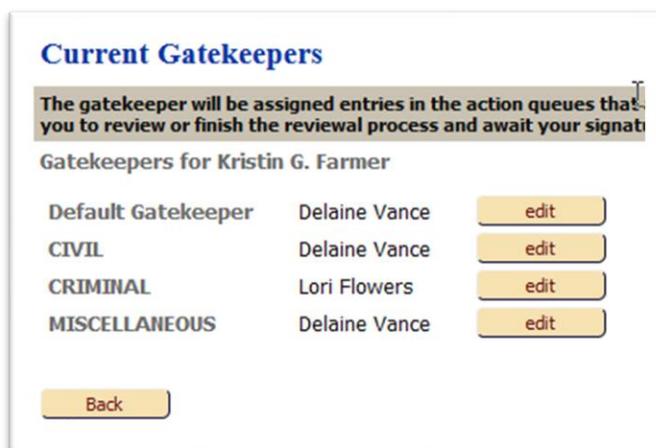
Cancel Upload Signature

- 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.

Select Gatekeeper

Howard W Wilson

The gatekeeper will be assigned entries in the action queues that are meant to be reviewed by you. The gatekeeper will review these items and either assign them for you to review or finish the reviewal process and await your signature.

Change Gatekeeper

Organization: RUTHERFORD CHANCERY COURT
 Court Division: CHANCERY COURT
 User: Howard W Wilson
 Gatekeeper:

Click the down-arrow to select from the listed court names.

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.

Change Password

Enter Current Password

Password: *

Your password must be at least 8 characters long, must contain a number, and must be different than your user name.

New Password: *

Confirm New Password: *

Enter NEW Password in both fields.

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.

Login History

Shannon Brown Log In History

User Account Status: Active Entries per page: 50 ▾

1

Date Logged In	Log In Result	Requesting IP Address
2025-01-28 19:22:39.0	Succeeded	192.168.128.64
2025-01-28 18:41:47.0	Succeeded	192.168.128.64
2025-01-27 18:49:01.0	Succeeded	192.168.128.64
2025-01-27 18:30:44.0	Succeeded	192.168.128.64
2025-01-27 11:59:04.0	Succeeded	192.168.128.64
2025-01-24 19:03:56.0	Succeeded	192.168.128.64

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).

Binders

Court: RUTHERFORD CHANCERY COURT
 Court Division:

New binder:

Existing binders:
 Judge: Owner: First Name: Last Name:
 Search By:

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.

- Fill in the requested information after selecting one of these options, and click either **Search** or **Create Binder** to proceed.
- 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.

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

Binder Details

Name: Hearing for **Event Date:** 11/27/2024

Judge: Ash, Don

Reassignment History:

Owner: Morgan, Brittney

Updated By: Morgan, Brittney

Click buttons to add additional documents or add new headers for the table.

This table lists the documents in the case. The preparer of the Binder may choose to delete or re-order some of the documents for easier viewing of the Binder.

Back Generate Add Docs Add Header Expand All Collapse All Delete Selected

	Top	Sub	Description	Filed On	link	Size	Filter
<input type="checkbox"/>	1	-	TOM JOHNSON vs ASHLEY A. JOHNSON : Case 24CV-7				
<input type="checkbox"/>	-	1	ORDER:	11/07/2024		352 Kb	
<input type="checkbox"/>	-	2	MEDICAL RECORDS: MR	09/09/2024		183 Kb	
<input type="checkbox"/>	-	3	ANSWER:	08/09/2024		266 Kb	
<input checked="" type="checkbox"/>	-	4	COMPLAINT for Tom Johnson and Ashley Johnson	06/24/2024		13 Kb	
<input type="checkbox"/>	-	5	SUMMONS	06/24/2024		115 Kb	
<input type="checkbox"/>	-	6	MARITAL	06/24/2024		23 Kb	
<input type="checkbox"/>	2	-	ASHLEY A. JOHNSON vs TOM JOHNSON : Case 24CV-3				
<input type="checkbox"/>	-	1	ORDER (PROPOSED):	11/25/2024		0 Kb	
<input type="checkbox"/>	-	2	ORDER:	07/18/2024		139 Kb	

Click the checkbox and **Delete Selected** to delete the specified document from being included in the Binder creation.

- 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**.
- 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).
- 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).

Case and Document Search

Name: Hearing for 11.27.2024 **Event Date:** 11/27/2024
Judge: Ash, Don **Generated:** 11/25/2024
By: Morgan, Brittney

QUERY FOR A SPECIFIC CASE

Case Number

Court Division

Find documents from within a specific case.

OR

INCLUDE ANY DOCUMENT

Header Name

New Header:

Existing Header: TOM JOHNSON vs ASHLEY A. JOHNSON : Case 24C

Bookmark Name:

Document Location: No file chosen

Find documents from your computer or thumb drive.

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.

Existing binders:

Judge: Owner: First Name: Last Name:

Search By:

Entries per page:

View Binder	Name	Case Number	Type	Judge	Owner	Size	Updated by	Event Date	Generated Date	Auto Update	Up To Date	Gen. Day	Change Gen. Day	Days Left
<input type="checkbox"/>	JAMES SMITH vs JANE SMITH Judge Howard	24CV-6	Single		Morgan, Brittney	1044 Kb	Morgan, Brittney	11/15/2024	11/07/2024 14:24	<input type="checkbox"/>				
<input type="checkbox"/>	ASHLEY A. JOHNSON vs TOM JOHNSON	24CV-3	Single	Ash, Don	Ash, Don	304 Kb	Ash, Don	11/29/2024	11/25/2024 14:03	<input type="checkbox"/>				
<input type="checkbox"/>	Hearing for 11.27.2024		Multi	Ash, Don	Morgan, Brittney	1549 Kb	Morgan, Brittney	11/27/2024	11/25/2024 14:55	<input type="checkbox"/>				
<input type="checkbox"/>	JAMES SMITH vs JANE SMITH	24CV-6	Single	Ash, Don	Morgan, Brittney	1420 Kb	Morgan, Brittney	11/29/2024	11/25/2024 14:50	<input type="checkbox"/>				
<input type="checkbox"/>	Binder for Case #23CV-8	23CV-8	Single	David Bragg	Morgan, Brittney	4727 Kb	Morgan, Brittney	05/27/2024	06/15/2024 01:01	<input checked="" type="checkbox"/>	Yes	Daily	<input type="text" value=""/>	
<input type="checkbox"/>	Motion Docket for Tuesday	17CV-217	Single	David Bragg	Administrator, System	11018 Kb	Administrator, System	01/01/2220	09/19/2019 11:14	<input type="checkbox"/>				
<input type="checkbox"/>	Test Annulate CASE #23CV-7	23CV-7	Annulate	Diana Burns	Morgan, Brittney	405 Kb	Morgan, Brittney	05/27/2024	04/08/2024 17:22	<input type="checkbox"/>				

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.

Binder Details

Name: ASHLEY A. JOHNSON vs TOM JOHNSON **Event Date:** 11/29/2024

Judge: Ash, Don **Generated:** 11/25/2024

Reassignment History: **Date Updated:** 2024-11-25 14:02:50.0

Case Number: 24CV-3

Owner: Ash, Don

Updated By: Ash, Don

Top	Sub	Description	Filed On	link	Size	File

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.

Case and Document Search

Name: Hearing for 11.27.2024 **Event Date:** 11/27/2024

Judge: Ash, Don **Generated:** 11/25/2024

By: Morgan, Brittney

QUERY FOR A SPECIFIC CASE

Case Number

Court Division

OR

INCLUDE ANY DOCUMENT

Header Name

New Header:

Existing Header: TOM JOHNSON vs ASHLEY A. JOHNSON : Case 24C

Bookmark Name:

Document Location: No file chosen

Find documents from within a specific case.

Find documents from your computer or thumb drive.

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.

JAMES SMITH vs JANE SMITH : Case 24CV-6

Header Name

New Header: JAMES SMITH vs JANE SMITH : Case 24CV-6

Select Header: 17CV-217

Back Add Documents

Date Filed Document

01-24-2025 SUMMONS (RUTHERFORD CO): Test Approver Sig

01-10-2025 ORDER (PROPOSED):

17CV-217
Case law for review

- 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.

Binder Case Documents

Name: Motion Docket for Tuesday /2220

Judge: David Bragg /19/2019

by: Administrator, System

JAMES SMITH vs JANE SMITH : Case 24CV-6

Header Name

New Header: JAMES SMITH vs JANE SMITH : Case 24CV-6

Select Header: 17CV-217

Back Add Documents

Date Filed Document

01-24-2025 SUMMONS (RUTHERFORD CO): Test Approver Sig

01-10-2025 ORDER (PROPOSED):

01-06-2025 ORDER (PROPOSED):

01-03-2025 ORDER (PROPOSED):

12-12-2024 SUMMONS (RUTHERFORD CO):

12-12-2024 BRIEF:

12-11-2024 FINAL DECREE OF DIVORCE (PROPOSED):

10-28-2024 SUMMONS (RUTHERFORD CO):

10-21-2024 SUMMONS (RUTHERFORD CO):

Select radio button for the Header. Text field is editable.

Mark the checkbox for each document you wish to Add.

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.

OR INCLUDE ANY DOCUMENT

Header Name

New Header:

Existing Header:

Bookmark Name:

Document Location: No file chosen

Select a radio button & fill our the appropriate Header field.

Click Choose File to locate the document(s). Click Add to proceed.

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.

	Top	Sub	Description	Filed On	link	Size	File
☐	1	-	24CV-6				
☐	-	1	COMPLAINT FOR DIVORCE: Complaint	06/14/2024		11 Kb	
☐	-	2	SUMMONS (RUTHERFORD CO): Summons to Court	06/14/2024		115 Kb	
☐	-	3	MARITAL DISSOLUTION AGREEMENT: MDA	06/14/2024		13 Kb	
☐	-	4	COMPLAINT: Test Receipt	08/30/2024		186 Kb	

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.

Existing binders:

Judge: Owner: First Name: Last Name:

Search By:

(2) Click the button.

(1) Mark the checkbox.

<input type="checkbox"/>	<input type="button" value="View Binder"/>	Name	Type	Judge	Owner	Size	Updated by
<input type="checkbox"/>		3 EMILY RONALD vs MARK JONES	24CV-1	Single	Wilson, Howard Morgan, Brittney	0 Kb	Morgan, Brittney
<input type="checkbox"/>		Court Hearings for 12.01.24	Multi	Wilson, Howard Morgan, Brittney		0 Kb	Morgan, Brittney

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.

Existing binders:

Judge: Owner: First Name: Last Name:

Search By:

Clicking the icon will open the binder in a new browser tab. Save a copy onto your computer to allow for Adobe functionality.

<input type="checkbox"/>	<input type="button" value="View Binder"/>	Name	Case Number	Type	Judge	Owner	Size
<input type="checkbox"/>		VICTOR JONES vs CAMILA FREDRICK	24CV-8	Single	Wilson, Howard Brown, Shannon		2752
<input type="checkbox"/>		ASHLEY A. JOHNSON vs TOM JOHNSON	24CV-3	Single	Wilson, Howard Morgan, Brittney		308
<input type="checkbox"/>		Court Hearings for 12.09.24		Multi	Wilson, Howard Morgan, Brittney		1533
<input type="checkbox"/>		Test - EMILY RONALD vs MARK JONES	24CV-1	Single	Wilson, Howard Morgan, Brittney		187

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