JUDGE QUICK GUIDE

OVERVIEW OF TASKS FOR THE JUDGE

1. Upload a signature to be used for e-signing.
2. Select which email notifications you want to receive. It is recommended that you mark the checkbox *"A queue entry has been assigned to me."*
3. Familiarize yourself with **Queues** and **Binders**. A Judge's interaction with the Court Interface revolves around these two functionalities. Each are accessed through their respective buttons on the **Home page**.
4. Navigate the **Queues' pages** and learn how to locate assigned tasks needing your attention and signature.
5. Understand what case information can be viewed on the **Action Details Page** and how to act on requested tasks.
6. Understand how to view **Proposed Orders** and how to either sign them into orders or reject them.
7. Understand how to view **Motions** and respond with either a signed order to grant or deny the request.
8. Be familiar with where and how to **reassign a queue entry** to another court staff member as well as where and how to write messages/instructions to them.

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HOME PAGE

When a judge logs into Court Review, two buttons will be visible - ***View Queues*** and ***Binders****.* (Additional buttons may display if the court administrator adds additional role permissions in the configuration.)

1. **View Queues** – Clicking this button on the **Home Page** will direct the user to the **My Queue Entries Page,** which will display the numerous outstanding tasks requiring action on the part of the judicial or court staff member. Setting the filter fields and clicking **GO** on the **My Queue Entries** will reset the page and display the requested information. Alternatively, the **My Queue Entries Page** may also be accessed from the **Home Page** by hovering over the **Filings Tab** and selecting **Action Queues.**
2. **Binders Button -** Clicking this button will direct the user to the **Binders page** where binders can be created or viewed. Alternatively, this page may be accessed by hovering over the **CASEaDia Tab** and selecting **List Binders**. This feature enables the judge to have easy access during their hearings to all required court documents, research, exhibits, and the certification document stating that the record is complete.

UPLOAD A SIGNATURE TO BE USED FOR E-SIGNING

Oftentimes this task is done by the administrator, but for those who will attend to it themselves:

1. Hover over the tab **My Profile** in the menu bar and select **My User Profile** from the drop-down list.
2. Click the button **Upload Signature**.
3. Mark the checkbox **Primary Signature,** if applicable for this signature. (Note: multiple signatures may be uploaded for different purposes. At least one signature must be designated as *Primary*.)
4. 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.
   - **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."
   - **Signature Text:** This is the electronic signature text, usually following the format: /s/Judge Jones.
   - **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.
5. Click *Upload Signature* at the bottom of the page.

SET PREFERENCES FOR EMAIL NOTIFICATIONS

1. Hover over the tab **My Profile** in the menu bar and select **My User Profile** from the drop-down list.
2. Click the button **Modify User Profile**.
3. In the *Email Notification section*, mark the checkbox notification behaviors desired for your account. It is recommended that you at least mark the checkbox *"A queue entry has been assigned to me."*
4. Click **Submit** at the bottom of the page.

SELECT A GATEKEEPER

The use of a Gatekeeper allows a judge to streamline their workflow and maximize time efficiency by having the gatekeeper review first the judge-assigned queue entries before the judge sees them. The gatekeeper will then reassign the filing to the judge and include a note informing the judge of the filing's status, if more review is necessary, or if the filing is ready for the judge's 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 around 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.

1. Hover over the tab **My Profile** in the menu bar and select **My User Profile** from the drop-down list.
2. Click the button **Select Gatekeeper**.
3. Click the **edit button** to add or change a gatekeeper.
4. Click **Save Gatekeeper** to accept the changes.

QUEUES - OVERVIEW

Queue entries are like sticky-notes - they act as reminders of actions that need to be taken. A filing that has been routed to the queues has already been accepted by the court, time-stamped, approved, and docketed to the case, with the exception of:

1. Filings configured to go to a Pre-Queue, and
2. 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 creating in response to the proposed order will be docketed.

Queues are accessed by clicking the **View Queues button** on the **Home page** or by hovering over the **Filings Tab** in the menu bar and selecting **Action Queues.** This directs the user to the **My Queue Entries Page**.

PRE-QUEUES A 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. Some courts configure a *Requested Summons* document type to stop at a pre-queue in order to be reviewed, changed to an *Issued Summons*, signed and then returned to the filer for service.

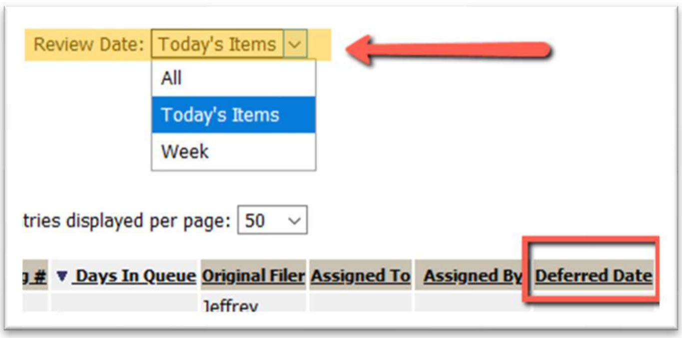
In a pre-queue, the court official has the option in the **Action Section** on the **PreQueue Entry page** to *Sign*, *Process Unsigned*, *Return to Filer*, or *Reassign to another court official*. If it is returned to the filer, the field **Note to Submitter** is available for comments/instructions for a resubmission. Likewise, if it is reassigned to another court official, the field **Note to Judge/Court Staff** is available for comments/instructions. If the queue entry is signed, or processed unsigned, the filing will be directed to the **Approve Filings page** to complete its processing.

QUEUES – the MY QUEUE ENTRIES PAGE

The **My Queue Entries page** displays a data table which lists outstanding queue entries.

1. Several drop-down search fields at the top of the page allow the user to filter the queue entries that will be shown on the page.
2. Clicking **Go** refreshes the page and changes the displayed table information according to the filter selections.

NOTE: If the **Deferred Date feature** (which is viewed in the left column of the **Queue Entry Table**) is regularly used by the court, a court official would need to change the defaulted selection showing in the **Review Date field** in order to view all of their assigned queue entries, future and present

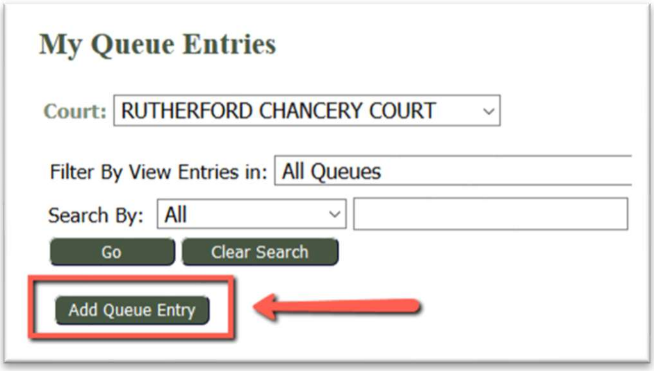


3. Each column header has an ascending/descending **sort** feature by clicking on the header title and controlling the order of the listings with the up/down arrow. The default is set to the **Days in Queue column** which will position the newest queue entries at the top of the table.
4. The **Assigned To column** identifies who is tasked with completing the queue entry. If this individual has pre-set their profile to "*receive notifications when a queue entry is assigned to them*," they will already know that the entry is awaiting their attention because they would have received an email notification.
5. Individuals who know that certain queues belong to them (and consequently the queue entries within those queues) may mark the checkboxes to the left of each individual entry and click the **Assign task to myself button** found at the bottom of the page. Multiple entries may be assigned at one time in this manner.
6. Supervisors who need to task queue entries to individual members of their team, will follow these steps:
   a) Click the ***hyperlink Document title*** in the **Title column** to be directed to the **Action Details page**.
   b) At the bottom of the page, click the down-arrow in the **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 **Reassign To field** and select the name of the intended individual for the task.
   d) Click the **Reassign button**.
7. Click the ***hyperlink Title*** in the **Title column** of the desired queue entry in order to be directed to the **Action Details** page.
8. 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 the system is already configured to

provide the queue entry within which the judge can sign and submit an Order. There are 2 ways to approach creating an internal queue entry:

OPTION #1:

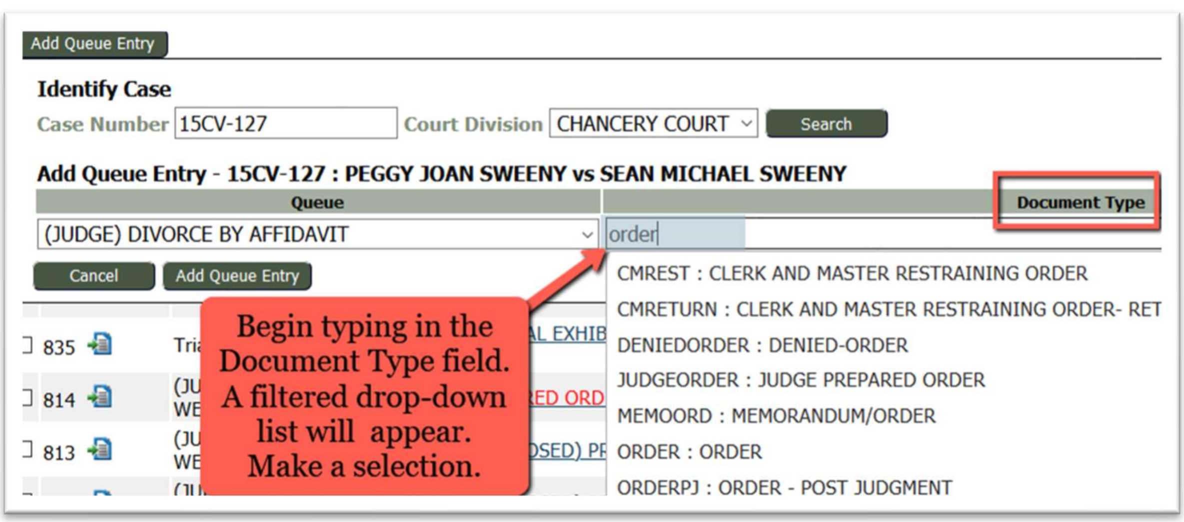
a) On the **My Queue Entries page**, click the button **Add Queue Entry**.



b) In the pop-up box, enter the case number in the provided field and click **Search**.

c) In the expanded box, click the down-arrow in the **Queue field** to expose the **Judicial Queue list**. Select the appropriate queue from the drop-down list of queues.

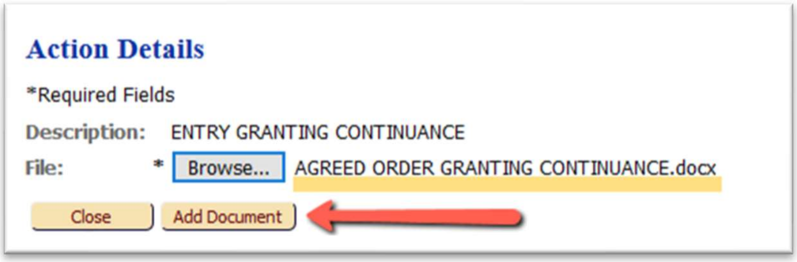
d) Inside the **Document Type field,** begin typing the intended document type you wish to file**,** either by code or name (or partial name), and the system will filter options in a drop-down list.



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

f) Click OK when a pop-up box asks permission to continue.

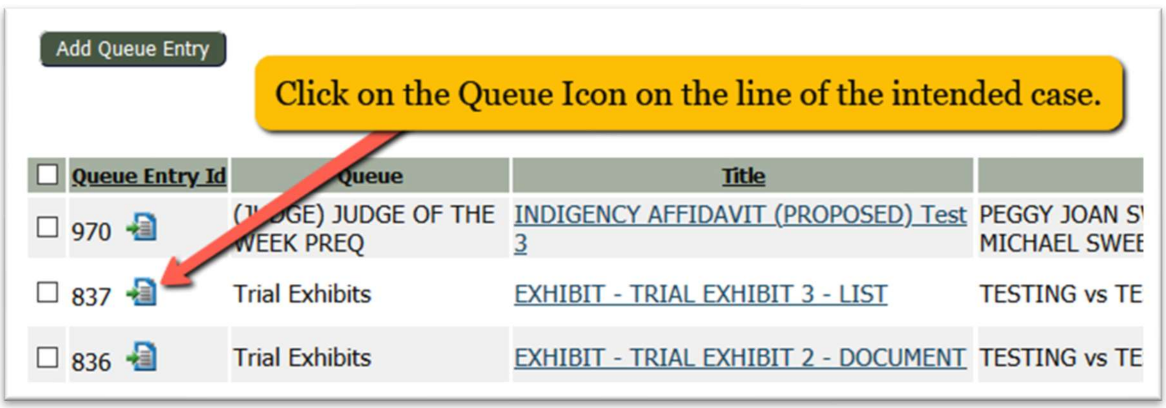
g) An **Action Details box** will display. Click the **Browse button** to locate and select the intended document from your computer. When the document title displays next to the **Browse button**, click the button **Add Document**.



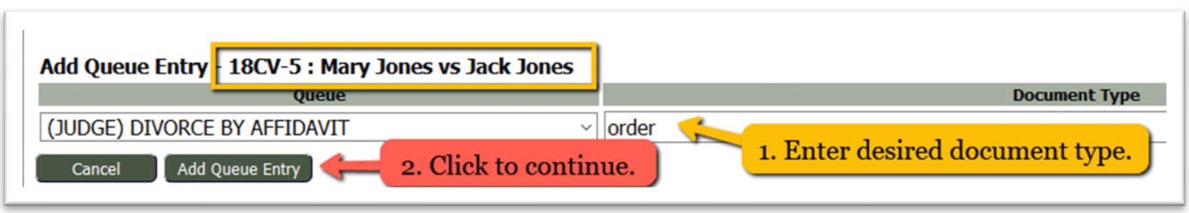
h) This directs the user to the **Action Details page** where the submission may be signed and completed.

OPTION #2:

a) On the **My Queue Entries page**, click the **icon** under the **Queue Entry ID column** on the line of the applicable case.



b) Because the case has already been identified by selecting the Queue Entry icon from its applicable line in the queue table, the information will already appear in the pop-up box.



c) Click the down-arrow in the **Queue field** to expose the **Judicial Queue list**. Select the appropriate queue from the drop-down list of queues.

d) Inside the **Document Type field,** begin typing the intended document type you wish to file**,** either by code or name (or partial name), and the system will filter options in a drop-down list.

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

f) Click OK when a pop-up box asks permission to continue.

g) An **Action Details box** will display. Click the **Browse button** to locate and select the intended document from your computer. When the document title displays next to the **Browse button**, click the button **Add Document**.

i) This directs the user to the **Action Details page** where the submission may be signed and completed.

QUEUES – the ACTION DETAILS PAGE

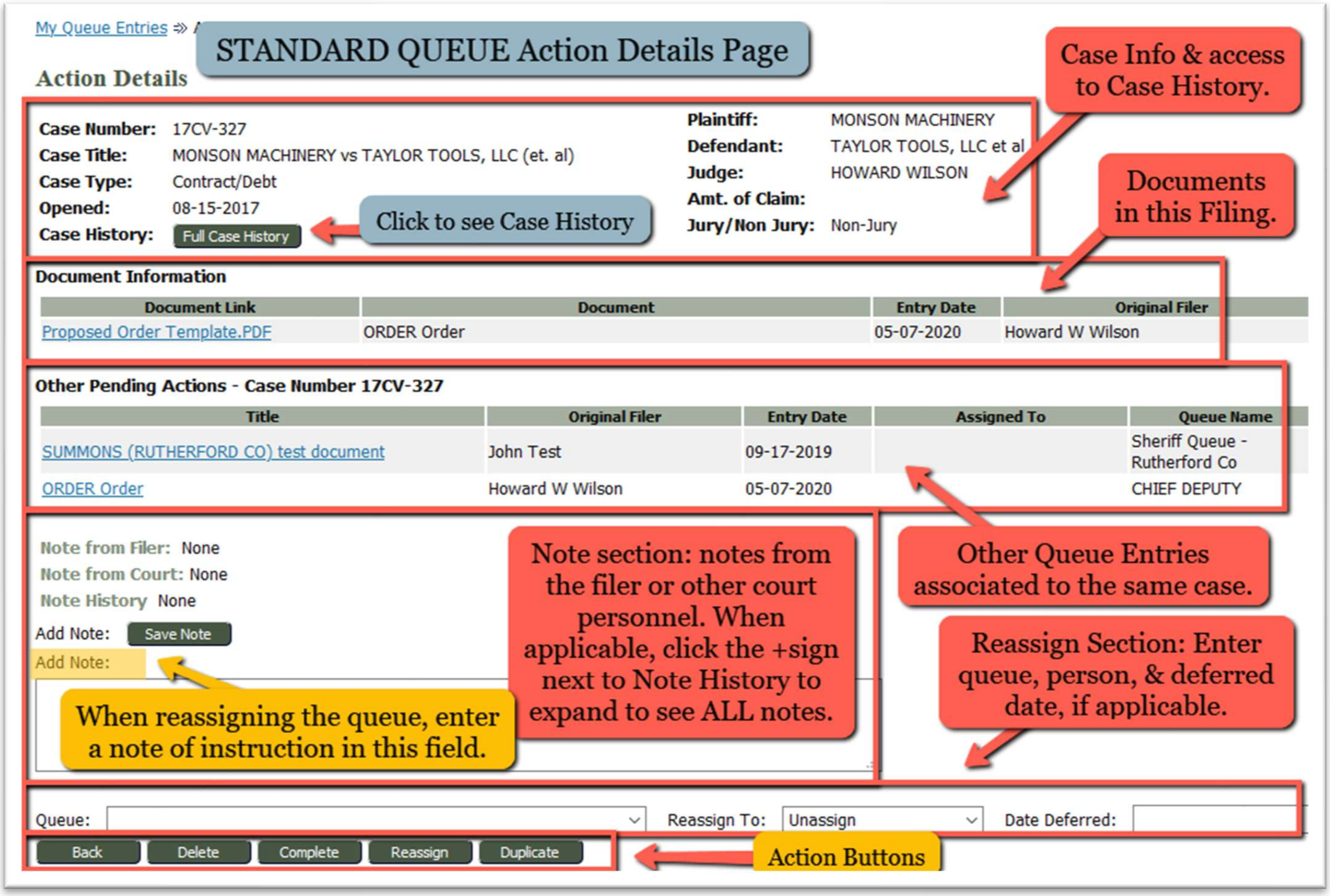
The **Action Details** page, which is accessed by clicking the *hyperlink title* from the **My Queue Entries** page, allows court personal to view case information of the selected queue entry, documents associated to the queue task, other pending action in other queues associated to the same case, and any notes from the filer or court staff members regarding the filing.

The ***STANDARD Action Details*** page is used primarily by court staff for follow-up tasks related to a filing. The ***JUDICIAL Action Details*** page is used primarily by Judges, Magistrates, and judicial 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. These queue entries are then reassigned back to the judge or magistrate for signature and submission.

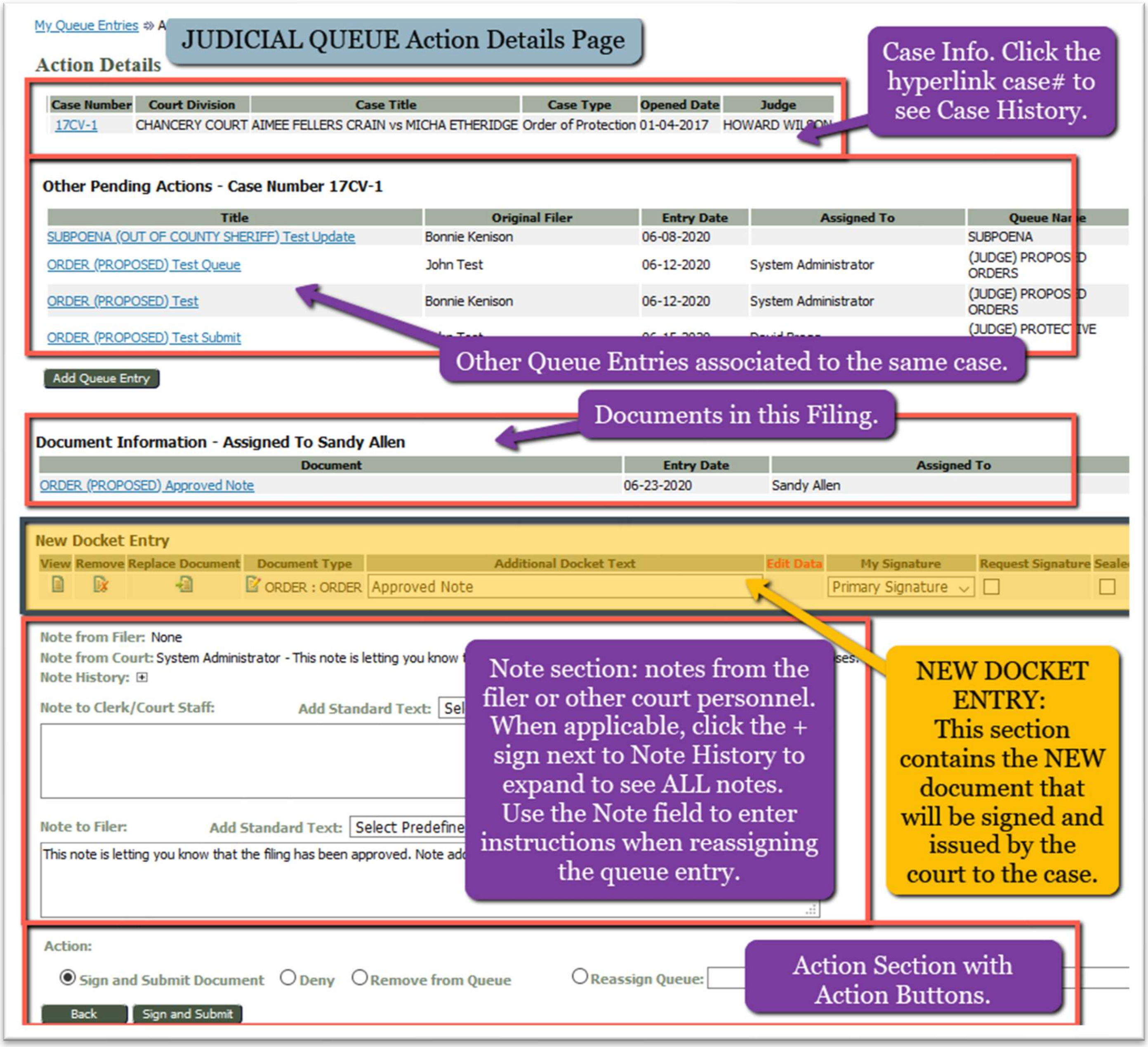
The appearance of the **Action Details page** for a ***Standard Queue*** differs from that of a ***Judicial Queue***. The **Standard Queue** page has no continued interaction with the interface once the required task is done. The user selects the **Complete button**, similar to placing a checkmark beside a completed item on a "To Do" list. The queue entry is then automatically removed from the **My Queue Entries Page** and tracked on the **Action Queue Log Page**. At the bottom of the page 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.

Most significantly, the ***Judicial Queue Action Details Page*** differs from the S***tandard Queue Action Details Page*** by including a **New Docket Entry section** 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. Judicial queue entries may also be re-assigned to another court staff member or removed from the queue with the label *No Action Taken* on the **Action Queue Log**. If the workflow of the specific court designates a judicial 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 judicial assistant with instructions in the **Note section** for the assistant to create and upload the requested document. Once done, the assistant then reassigns the queue entry back to the judge with a note entered in the **Note section** that the document is now in the queue and ready for signature.

Screenshot of a ***Standard Queue ACTION DETAILS PAGE:***



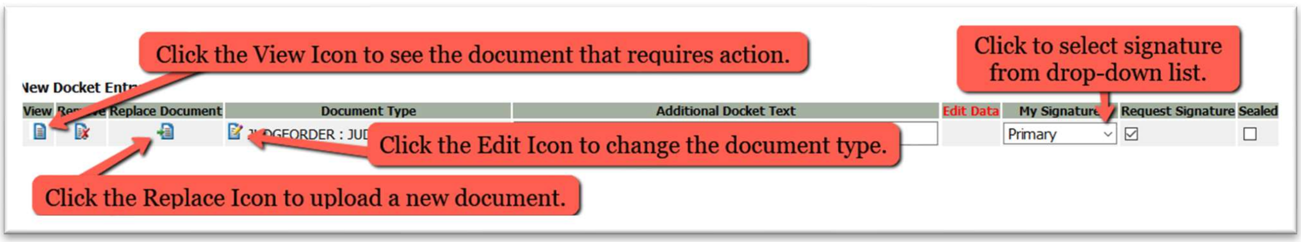
Screenshot of a ***JUDICIAL Queue ACTION DETAILS PAGE***:



1. **Case Information section –** This section gives details about the case. Clicking either the button **View Case History** or the ***hyperlink case number*** will open a new tab in the browser and display the case history. Some courts also have the **Service List Button** which will open a new browser tab and show the **Certificate of Service.**
2. **Document Information section –** This section lists the documents that were submitted together in the filing. Clicking the *hyperlink 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.)
3. **Other Pending Action section –** This section lists documents associated to the same case number that are currently sitting in other queues awaiting action. Clicking any of these *hyperlink*

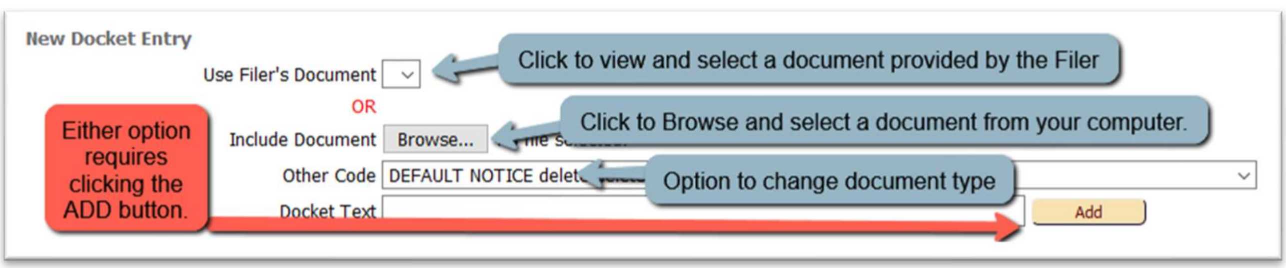
document titles will direct the user away from the current queue entry and lead them to the other listed queue entry. This is especially helpful if a court chooses to set the Motions Queue as a **Standard Queue** instead of a **Judicial Queue**. In this instance, if both a Motion and a Proposed Order 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. **<u>New Docket Entry section</u> –** This section defines the difference between a **Judicial Queue** and a **Standard Queue**. Only a **Judicial Queue** will display this section. 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.

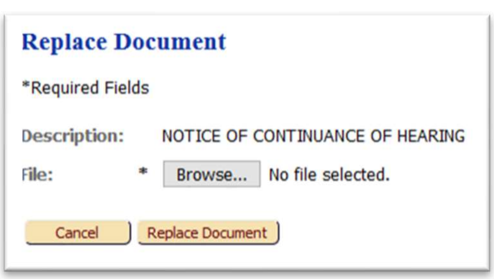


a) **View Icon** – Clicking this icon allows the user to open the filer's document that requires action. To view all the documents within the same filing, refer to the **Document Information section** on the page and click the individual *hyperlink document titles*.

b) **Remove icon** – Clicking this icon will remove the document and display a new section on the page asking to either use the Filer's document or browse your computer to replace it. Both options require clicking the Add button to continue.



c) **Replace Document icon** – Clicking this icon will display a pop-up box and allow the user to browse their computer to select a new document. Once added, click the button **Replace Document** in the pop-up box. The user will be directed back to the **Action Details page** to proceed with the queue task.



d) **Document Type edit icon** – Clicking this 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**

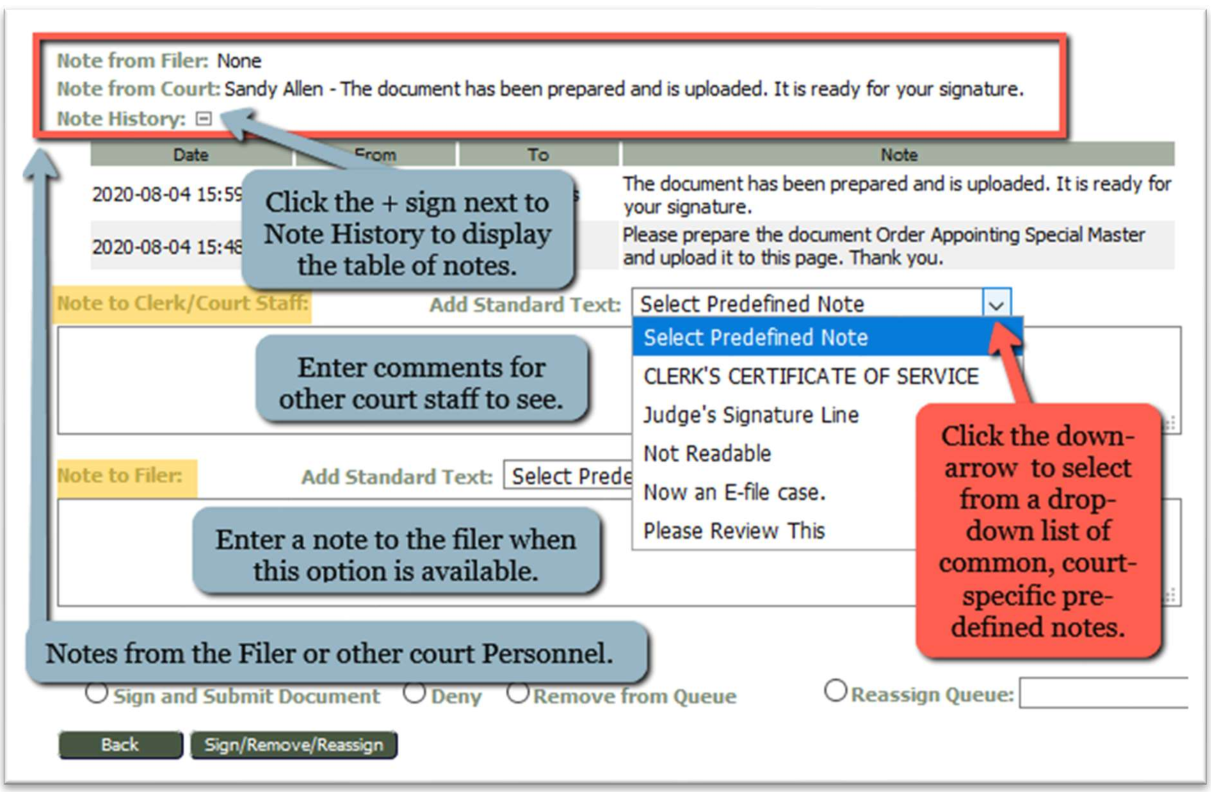
button to continue. (A scenario that would need this edit icon is if the court has the Motion queue set as a Judicial queue. Clicking the **View icon** would open the Motion document that has already been stamped and docketed to the case. The **Replace Document icon** would need to be used to upload the new document to be signed and submitted by the judge and the **Document Type edit icon** would need to be used to select the new *document type* that corresponds with the judge's order to approve or deny the Motion document.)

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 to the document.

f) **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.

g) 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**.

5. <u>**Note section**</u> – 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. Although the user may freely type comments or instructions in the **Note text field,** they may also choose to click the down-arrow in the **Add Standard Text field** to select a common, pre-defined court-configured note.



6. <u>**Action Section**</u> – This section at the bottom of the page indicates the action to be taken for the filing with the radio buttons:
   - ***Sign and Submit Document*** (This will electronically sign the document and send the filing back to **Approve Filings Page** to be stamped, approved, and docketed.

- ***Deny*** (This sends the document back to both attorneys as a "judicial rejection" with an option of giving an explanation in the **Note to Filer field**.)
- ***Remove from Queue*** (This removes the queue entry as No Action taken.)
- ***Sign and Reassign***, along with the fields ***Reassign Queue, To***, and ***Date Deferred*** (This feature allows a judicial officer to e-sign and then re-assign the queue entry to move on to another judicial officer for their e-signature. Both signatures are configured to attach in different locations on the document).

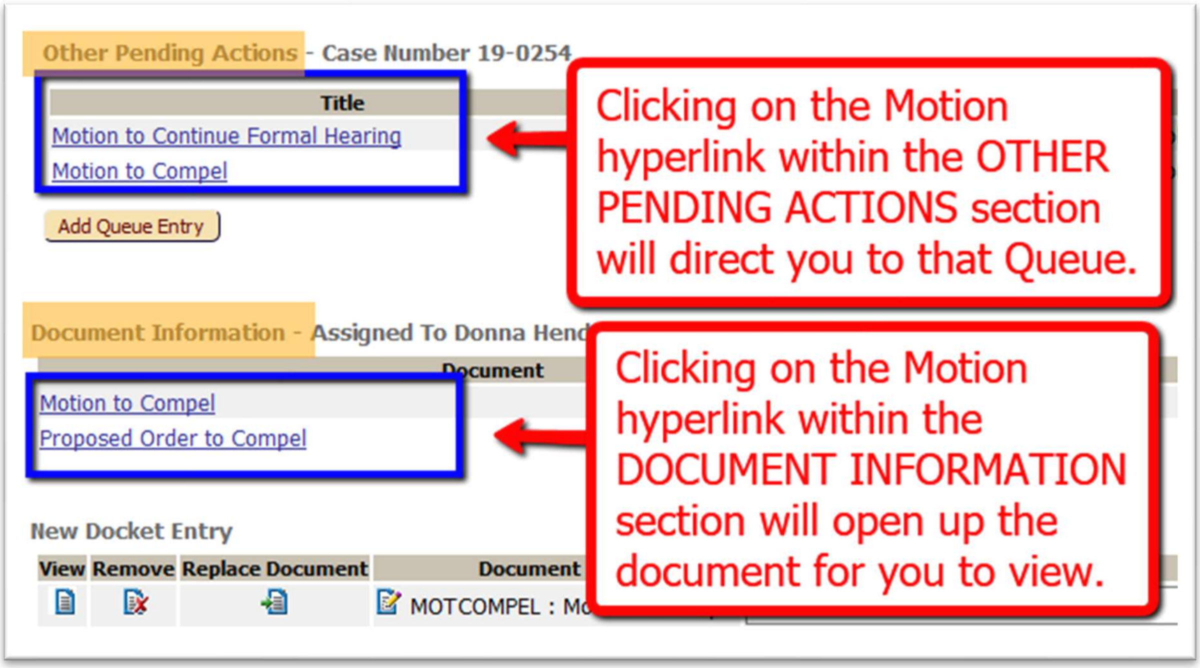
QUEUES – WORKING WITH PROPOSED ORDERS

- **Proposed Orders** are configured so that they will not be time stamped nor docketed in the CMS or DMS. Only the Order that is creating 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, you as the judge can edit them as needed in order to create the order.
- It is recommended that **Proposed Orders** are configured to go to the **Proposed Order Queue** where staff members will re-assign the queue entry to the correct judge/magistrate on the case. Some courts prefer to make these assignments on the **Approve Filings Page** before the filing is approved and sent to the queues.

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

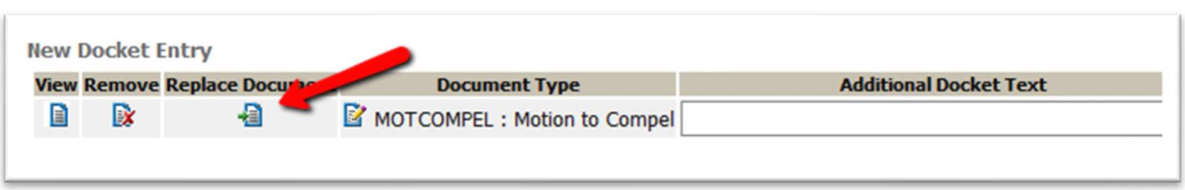
2. On the **Action Details page**, view the **Proposed Order document** by clicking on the **View icon** in the **New Docket Entry** section. It may also be opened and read by clicking on its **hyperlink title** in the **Document Information section**.
3. The **Document Information section** contains the documents that were filed together in the submission. They each can be opened and read by clicking on their **hyperlink title** in this section. If there is a **Motion** that accompanies the Proposed Order, it too can be viewed by clicking on its **hyperlink 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 hyperlink title in **this section**

will take the user to that queue. To return back to the **Proposed Order queue** from that queue page, the user would click on the **hyperlink title** of the **Proposed Order** in the **Other Pending Action section.**



NOTE: In the **New Docket Entry Section** under the **Document Type column**, the system will have automatically changed 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.

4. If the Proposed Order 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. You will be directed back to the **Action Details page** to proceed with the order.



   c. Select your name in the **My Signature Column.**
   d. 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**.

QUEUES – WORKING WITH MOTIONS

Courts differ on how they choose to handle Motions.

1. Some courts configure a ***Standard Motions Queue*** to receive Motion documents after they are approved on the **Approve Filing Page***.* With this type of queue, there is not a **New Docket Entry Section** nor the ability for a judge to sign an order. Often this queue is configured specifically for staff members to receive the queue assignment, rather than the judge, because they have office matters regarding the motion. If the judge is intended to receive the queue assignment so they can make a ruling or issue an order, they can view the motion document on the **Action Details Page** by clicking on the **View icon**, and then either:
   a) Return to the **My Queue Entries page**, click the **Add Queue Entry Button**, and continue by following the steps in the section *Creating an Internal Filing by Adding a New Queue Entry*, (pg. 13). This step allows the judge to browse their computer to upload the needed order. The screen then directs the judge to a *Judicial Queue*. On the **Action Details Page**, click the **View icon** to ensure that the correct document was uploaded. Select your signature in the **New Docket Entry Section**, and proceed to sign and submit the order; or
   b) Alternately, enter a note of instruction to a staff member on the Motion's **Action Details Page** in the **Note field** requesting that they draft a specific order per your decision on the motion. Reassign the queue entry to the staff member. The staff member receives the message in the queue, prepares the document, **creates a new queue entry** on the **My Queue Entries Page** following the steps in the section *Creating an Internal Filing by Adding a New Queue Entry* (pg. 13) and uploads the intended document. After being directed back to the **Action Details Page**, they click the **View Icon** to ensure that the correct document was uploaded and then enter a message back to you in the **Note field** indicating that the document has been uploaded and is ready for your signature. They reassign the queue entry back to you for signature and submission; or
   c) If the Motion was submitted with a **Proposed Order**, the **title** of the Proposed Order will be listed in the **Document information section** as well as in the **Other Pending Action section**. To *view* the **Proposed Order**, click on its ***hyperlink title*** in the **Document Information Section**, but to be directed to its Judicial Queue where the order may be signed and submitted, click on the Proposed Order's ***hyperlink title*** in the **Other Pending Action section**. On the **Action Details Page**, proceed to submission with the order.

2. Some courts choose to configure a ***Judicial Motions Queue*** to receive Motion documents after they are approved on the **Approve Filing Page**. With this type of queue, there *is* the ability for a judge to sign an order; however, unlike a proposed order, the document type shown in the **New Docket Entry Section** will not automatically change to be an order and will need to be manually adjusted to reflect the document type appropriate to the judge's decision for the internal filing. A ***Judicial Motions queue*** is usually configured for those motion document types that do not have a corresponding proposed order document type, otherwise a judge would be able to file their responding order from the **Proposed Order queue entry**.
   a) By default, the **Document Type column** will display the document type of the Motion that was docketed and which displays when the **View Icon** is clicked. Click the **edit icon** in the **Document Type column**. A pop-up box displaying a type-ahead field will appear. Enter a code or the name (or portion of the name) of the desired document type and select from the system's filtered options. Click the **Save button**. Click the **Replace Document icon** to browse your computer to upload the prepared order that is to be signed and submitted. Proceed by selecting an appropriate signature, marking the radio button **Sign and Submit document**, and clicking the **Sign and Submit button** at the bottom of the page; or
   b) Alternately, enter a note of instruction to a staff member in the **Note field** requesting that they draft a specific order per your decision on the motion. Reassign the queue entry to the staff member. The staff member receives the message in the queue, prepares the document, clicks the **Replace Document icon** to browse their computer to select the prepared document and clicks the button **Replace Document** inside the pop-up screen. This directs them back to the **Action Details page** where they click the **View Icon** to ensure that the correct document was uploaded. They manually change the name of the document type to reflect the

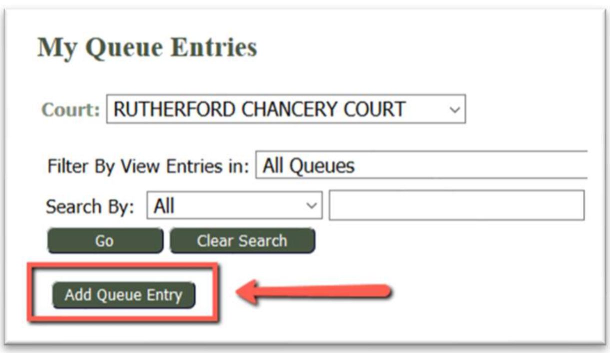
appropriate order to be issued, by clicking the **edit icon** in the **Document Type column** and entering a code or the name (or portion of the name) of the desired document type in the provided field. They make a selection from the system's filtered options and click **Save**. In the **Note field**, they enter a message back to you indicating that the document has been uploaded and is ready for your signature. They reassign the queue entry back to you for signature and submission.

QUEUES – CREATING AN INTERNAL FILING BY ADDING A NEW QUEUE ENTRY

Sometimes the judge needs to generate an internal filing and upload a decision or ruling to the system. They can do that from within the queues by adding a Queue Entry. For some document types, such as Proposed Orders, these steps are not necessary because the system is already configured to provide the queue entry within which the judge can sign and submit an Order. There are 2 ways to approach creating an internal queue entry:

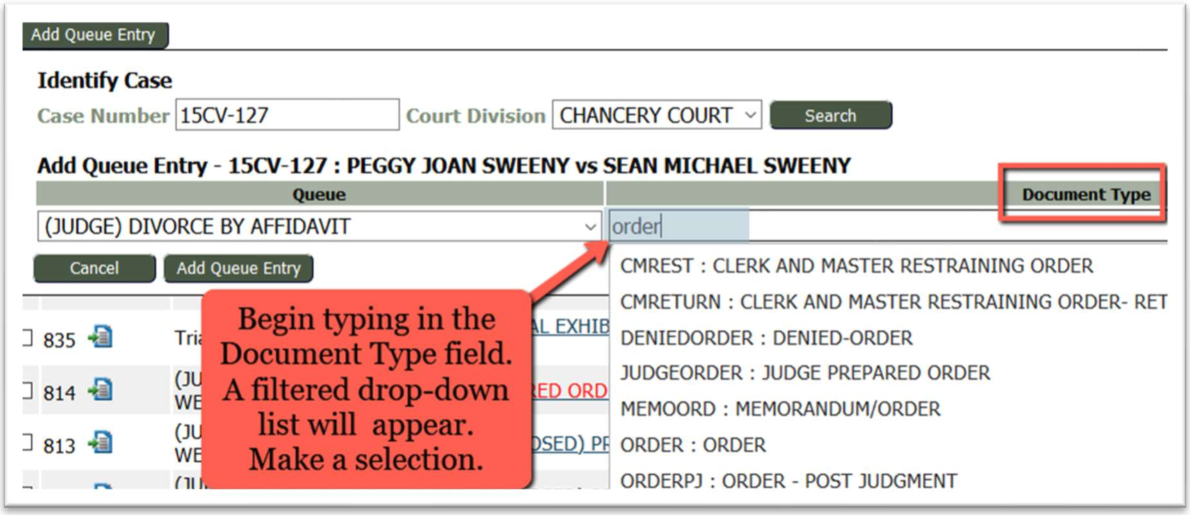
OPTION #1:

1. On the **My Queue Entries Page**, click the button **Add Queue Entry**.

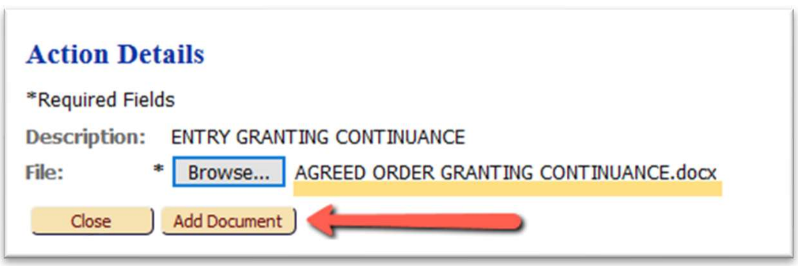


2. In the pop-up box, type the Case Number in the provided field and click **Search**.

3. In the expanded box, click the down-arrow in the **Queue field** to expose the Judicial Queue list. Select the appropriate queue for your filing.
4. Inside the **Document Type field,** begin typing the intended document type you wish to file**,** either by code or name (or partial name), and the system will filter options in a drop-down list.



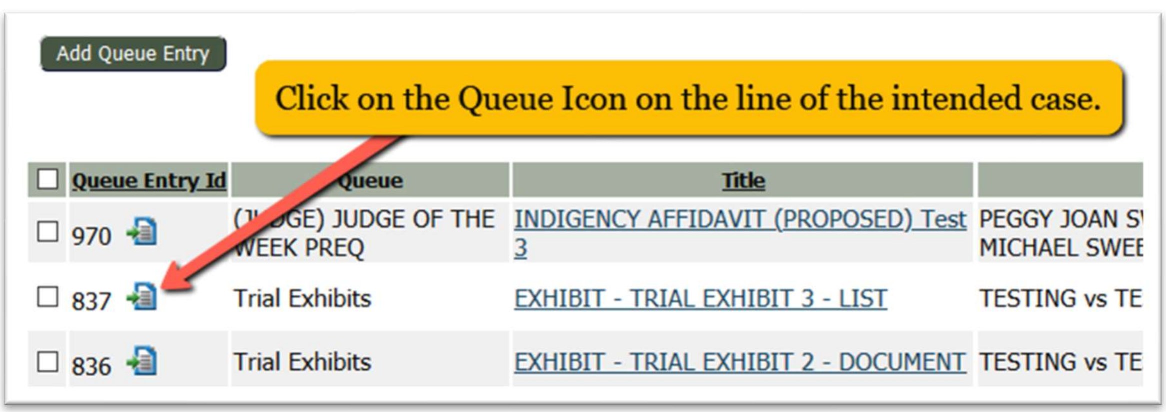
5. Select the desired document type and click the button **Add Queue Entry**.
6. Click OK when a pop-up box asks permission to continue.
7. An **Action Details** box will display. Click the **Browse button** to locate and select the intended document from your computer. When the document title displays next to the **Browse button**, click the button **Add Document.**



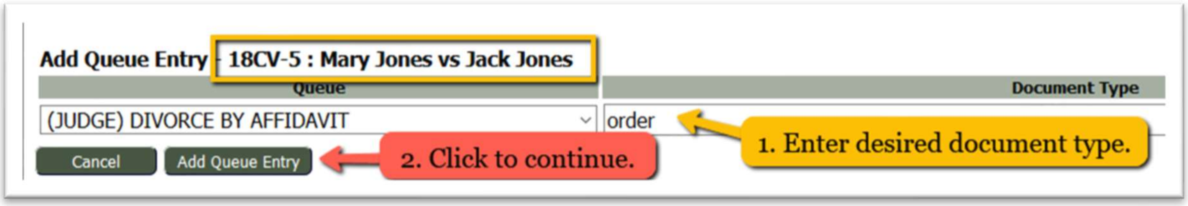
8. This directs the user to the **Action Details page** where the submission may be signed and completed.

OPTION #2:

1. On the **My Queue Entries page**, click the **icon** under the **Queue Entry ID column** on the line of the applicable case.



2. Because the case has already been identified by selecting the Queue Entry icon from its applicable line in the queue table, the information will already appear in the pop-up box.

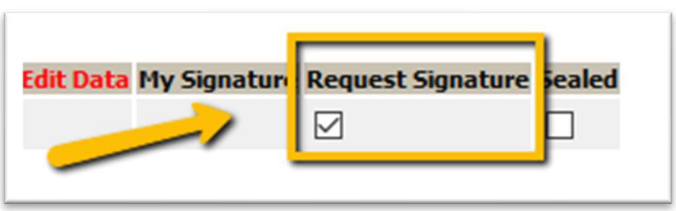


3. Click the down-arrow in the **Queue field** to expose the **Judicial Queue list**. Select the appropriate queue from the drop-down list of queues.
4. Inside the **Document Type field,** begin typing the intended document type you wish to file**,** either by code or name (or partial name), and the system will filter options in a drop-down list.
5. Select the desired document type and click the button **Add Queue Entry**.
6. Click OK when a pop-up box asks permission to continue.
7. An **Action Details box** will display. Click the **Browse button** to locate and select the intended document from your computer. When the document title displays next to the **Browse button**, click the button **Add Document**.
8. This directs the user to the **Action Details page** where the submission may be signed and completed.

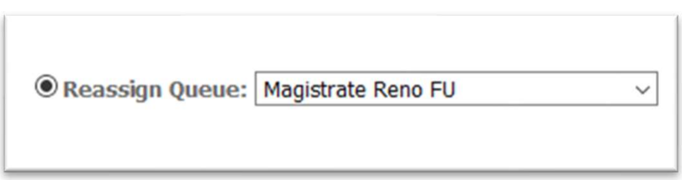
QUEUES – the SIGNATURE QUEUE. Using the Mass Signature Functionality

The eFlex system provides a means whereby judges may choose to quickly sign multiple judicial queue entries all from one page. This process requires that the judge have both a primary signature and a gatekeeper in place.

1. The gatekeeper will:
   a) Review the queue entry on the **Action Details page** and make the necessary changes in preparation for the judge's signature.
   b) Mark the checkbox **Request Signature** in the **New Docket Entry section.** This is the trigger that will send the entry to the Judge's **Signature Queue**.



   c) In the **Action Section** at the bottom of the page, click the radio button **Reassign Queue,** select the judge who will receive the queue assignment, and click the button **Reassign**.



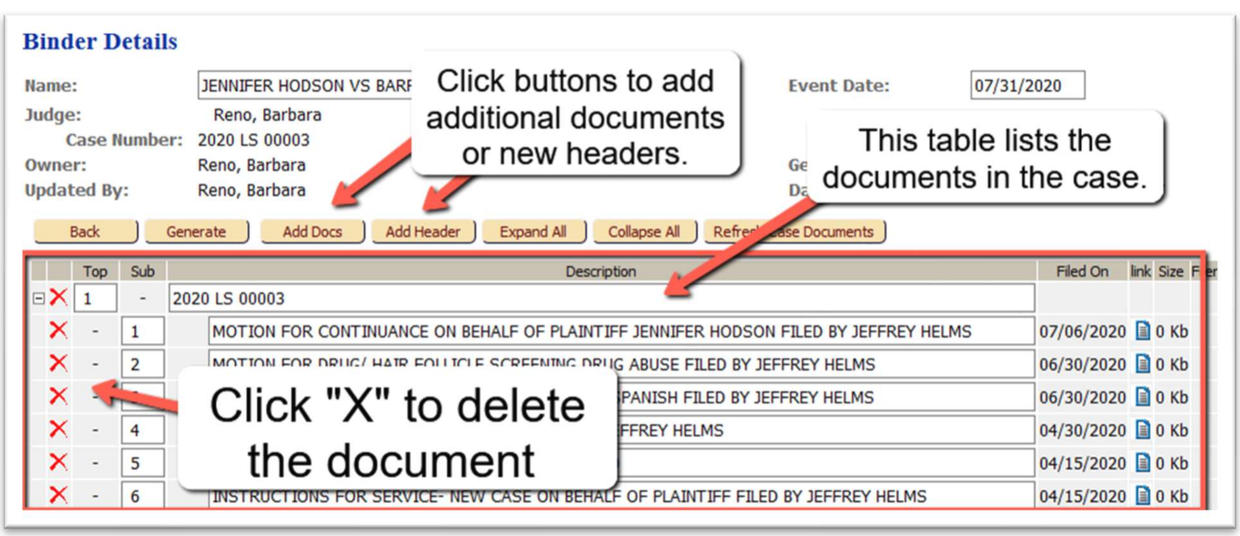
2. The judge will:
   a) Go to the **My Queue Entries page** and filter the **View Entries** field by selecting the queue **Signature Queues** and clicking **Go**.
   b) Individually select which queue entries are to be signed by marking the checkbox in the left column; or, mark the header checkbox to select them all.
   c) Click the button **Sign**.

HOW TO CREATE BINDERS

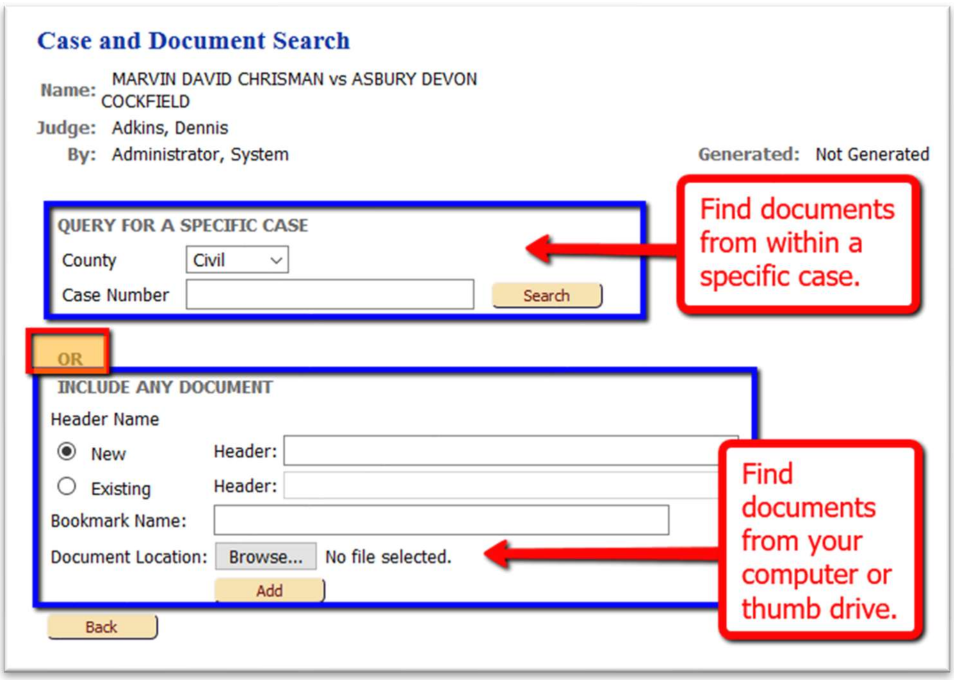
The eFlex system provides tools for gathering all required court documents and any additional requested research for one or more cases into a single, navigable pdf document. Once the binder is generated, the Adobe Acrobat Reader functions are used to navigate, highlight, or mark the PDF located on the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

1. From the Menu Bar, click the tab **Binder.** Alternately, click the **Binders** button from the **Home page**.
2. On the **Binders** page, select the applicable radio button: **Single, Multi,** or **Appellate**.
3. In the **Name** field, enter a unique title for the Binder: the title of the case, the date of the hearing, etc.
4. In the **Event Date** field, click inside the field to select a date from the pop-up calendar.
5. Click the down-arrow in the **Prepared for** field to view the drop-down list of names. Make a selection.
6. Mark the **Auto Update** checkbox if you choose to update the binder with additional filings that occur *after* the binder is created.
   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.

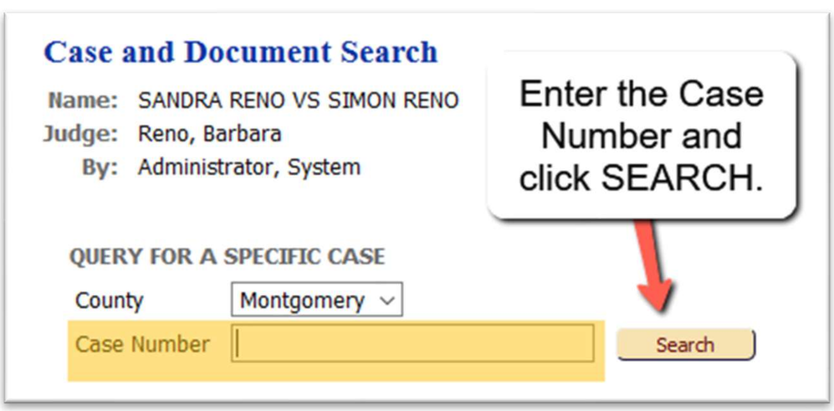
7. Click **Create** to be directed to the **Binder Details Page.**



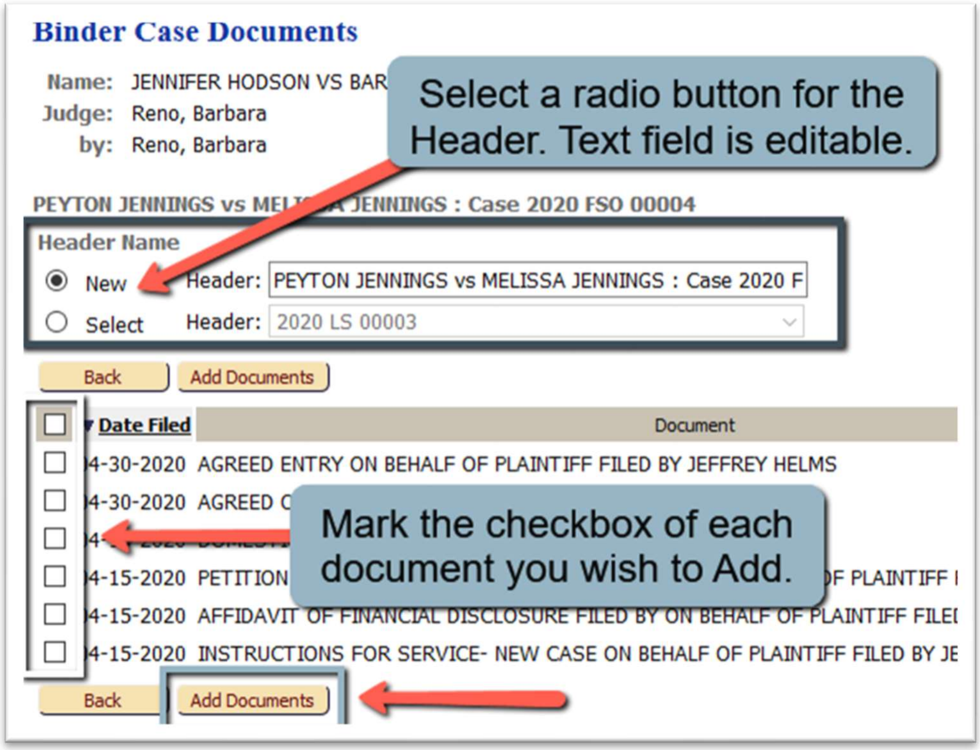
8. On the **Binder Details Page**, all documents from the identified case will be listed as subcategories under the case number category header. Click the "X" on the line of any document you choose to remove from the binder.
9. To include additional documents to the list, click the button **Add Docs.** Prior to clicking the button, you may choose to add a **new Header** under which the new document(s) will be added. To do so, click the button **Add Header**. A new field will display at the bottom of the document list. Enter a name for this new Header. Proceed by clicking the button **Add Docs** to be directed to the **Case and document Search page.**
10. The document(s) to be added may be located in another case in the system or from your browser.



   a. To locate it **from another case** –
      i. Enter the case number in the provided field and click **Search.**

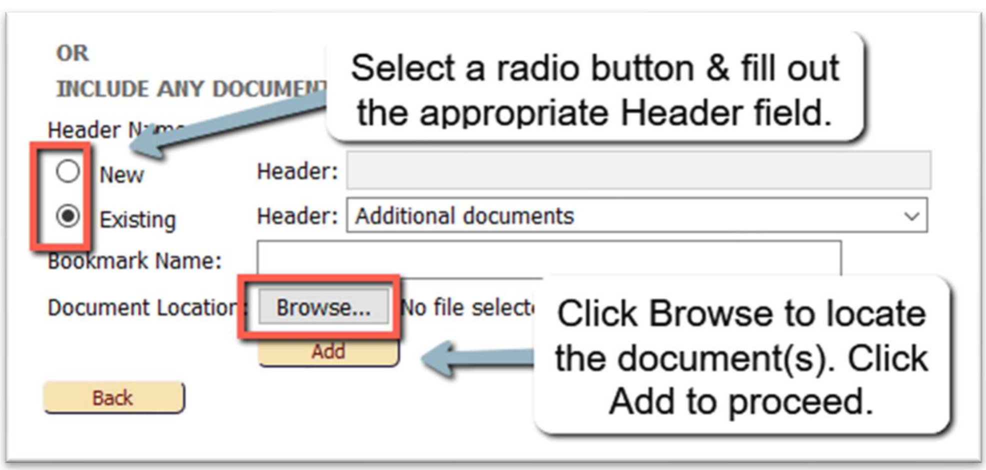


      ii. The user will be directed to the **Binder Case Documents** page which will display all the documents associated with the identified case. It will also list 2 Header name options. Select the desired radio button of the Header to be included in the created binder.



iii. Mark the checkboxes next to the documents you wish to add to the binder.
iv. If the user chooses to add more documents or another case to the binder, repeat the listed steps above.
v. Click the button **Add Documents** to complete this step.
vi. The user will be returned to the **Binder Details page**. Documents from both cases will now display. Edit text fields as needed. Jump to step 11 to continue.

b. To locate the document(s) **from your browser** –

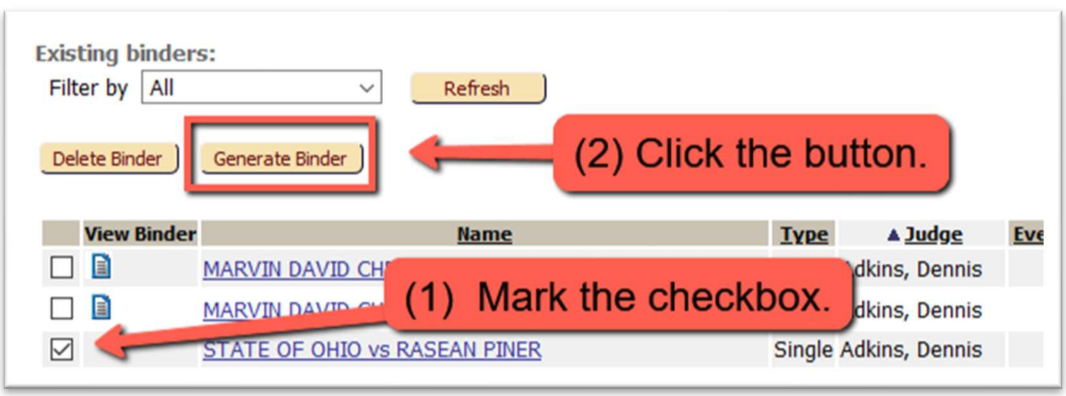


i. In the bottom section of the page, select a radio button for the Header. If the Header was already created on the **Binder Details page**, select **Existing**. Click the down-arrow in the **Header field** to the right of the radio button and select the header under which you want the document(s) to be listed in the binder.
ii. 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.

iii. In the **Bookmark Name field**, enter text that identifies how you want the document listed.
iv. Click **Add** to proceed.
v. The user will be returned to the **Binder Details page**. The added documents will now display under the selected header. Edit text fields as needed.

11. 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.
12. 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.
13. Clicking the **link icon** will open a new browser tab and display the listed document in pdf form.
14. 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**.

15. On the **Binders page**, mark the **checkbox** in the left column on the line of the newly created Draft.
16. Click the **Generate Binder** button.



17. 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.

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