



eFile & Serve Review Queue User Guide

Release 2025.1

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Publishing History

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ESO-FS-200-4987 v.2	Second	July 2024	<p>The following changes were made:</p> <ul style="list-style-type: none"> • Updated the “Tabs and Icons” topic. • Updated the “Additional Envelope Options” topic. • Updated the “Envelope Details” topic. • Updated the “Service Contacts” topic. • Updated the “Envelope Action History” topic. • Updated the “Keyboard Shortcuts” topic. • Updated the “Signing In” topic. • Added the “Deactivated Account” topic. • Added the “Resetting a Password” topic. • Added the “Suspended Account” topic. • Updated the “Manage Notifications Tab” topic. • Updated the “Reviewer Preferences Tab” topic. • Updated the “Review Queue Page” topic. • Updated the “Begin Document Review” topic. • Added the “Queue Prioritization” topic. • Added the “Scheduled Queue Rerouting” topic. • Added the “Filing Blackout Dates” topic. • Updated the “Filter Filings” section.

Document Publication Number	Revision	Date	Changes Made
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Document Publication Number	Revision	Date	Changes Made
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About This Guide

The purpose of this user guide is to provide users with details on how to use a product or a feature or functionality within the product.

User guides may include the following elements:

- User interface (dialog boxes and pages)
- Reports
- Tools

Audience

This document is intended for the following personas:

- Clients
- Tyler Client Services

Documentation Conventions

The format style applied to text enables readers to quickly determine the nature of information or an action they are to take.

Text Style	Description	Example
Bold	Shorthand notation for a menu, menu item, optional cascading menu, or selected tab Objects to click or select, including buttons, check boxes, options in a drop-down list, elements, fields, and section header name	On the Main Menu, click Tools → Options → Forms . Click License Key Editor .
Fixed-Width	User interface (UI) input typed exactly as shown Server names, file names, path names, application programming interface (API) names, XML settings in configuration files, databases, command names, system calls, and data structures and types	Type the value <code>Boston</code> in the City field. Run the <code>tables.sql</code> script for the <code>jcpBasketB</code> database.
<i>Italics</i>	Page and dialog box names Document titles Variable data to be replaced by an appropriate value	Return to the <i>Home</i> page. Refer to the <i>Navigation Guide</i> . Type the <i>filename</i> .
“Quotation marks”	Chapter within a document Rights on a role Job tasks within a job definition	Refer to the “Logic Rules” chapter. Feature requires the “Print the Event Listing Report” right.

Documentation Notes

Each documentation note provides information or action items regarding that area of the document.

Icon	Note Type	Description
	Note	Notes provide extra details about a topic or step.
	Caution	Caution messages indicate that a specific action could cause an error in the system.
	Warning	Warning messages indicate that a specific action could cause an interruption of service.
	Danger	Danger messages indicate that a specific action could damage the database infrastructure or hardware.

eFile & Serve Rebranding

Since launching the Tyler brand in 2009, Tyler Technologies has added more than 50 new products through acquisition and internal development, and its brand awareness is seeing some fragmentation in the market. As Tyler grows and adds applications, the current approach to product branding is no longer scalable. Tyler's product, development, organizational, and brand strategy need to align toward a common presentation – One Tyler. In 2022, Tyler updated the names of most of its products to officially position Tyler Technologies as one unified identity and brand.

All the Courts & Justice products fall under the new Justice Portfolio, and there is only one logo associated with all the products. Within the Justice Portfolio of products, the Odyssey File & Serve application is now referred to as eFile & Serve, and the Review Tool is now named eFile & Serve Review Queue.

Courts & Justice documentation reflects the new names beginning with the 2023 release of each product or application. Refer to the [Tyler Product Name Changes Frequently Asked Questions](#) for more information.

1 Overview

Topics covered in this chapter

◆ Capabilities

The eFile & Serve Review Queue is used to review the information contained in an electronic filing (e-filing) and then to perform an action on the filing so that it can ultimately either be transferred to the case management system, or returned to the filer to be resubmitted at another time.

Note: Some of the screen shots contained in this document may differ from the screens that are displayed in your application.

This document includes instructions for reviewers on how to access the eFile & Serve Review Queue, and also how to navigate through the application while reviewing e-filings.

Note: You must have “Reviewer” rights to perform many of the functions described in this document.

When you sign in to the eFile & Serve Review Queue, the *Review Queue* page is displayed. From here, you can click an envelope to review, or you can navigate to another page in the application.

The eFile & Serve Review Queue includes additional pages that you can access. After you sign in to the

application, click  to access the additional pages.



Figure 1.1 – eFile & Serve Review Queue Navigation Menu

Note: You must have “Court Administrator” rights to access the *Court Admin* page.

Capabilities

The functionality of the eFile & Serve Review Queue allows reviewers to do the following:

- Review and manage electronic filings
- Filter filings in the queue
- View the envelope details for a specified filing
- View the service contacts that are attached to a specified filing
- View the action history of a specified envelope
- View the review history for current and past filings
- Look up all envelopes in the application, or just look up envelopes for the signed-in reviewer or the envelopes for the reviewer's firm
- Add and manage court users and attorneys

Note: These actions require “Court Administrator” rights.

- Grant, moot, and deny proposed orders

Note: These actions require “Judicial Disposition Officer” rights.

2 Before You Begin

Topics covered in this chapter

- ◆ Tabs and Icons
- ◆ Additional Envelope Options
- ◆ System Requirements
- ◆ Keyboard Shortcuts
- ◆ Error Messages

Before you begin to work in the eFile & Serve Review Queue, review the information in this section to successfully use the software.

Note: All the features described in this document may not be available in your application. Some features must be configured by Tyler. As a result, your application may differ from the screen shots and descriptions that are included in this document.

Tabs and Icons

The tabs in the eFile & Serve Review Queue are described in this section.

Case Tabs

Tab	Description	Location In the Document
	Click the All tab to view all of the summary information for the specified envelope.	Summary Information, page 55
	Click the Case tab to open the Case Information pane.	Case Information, page 57
	Click the Env tab to open the Envelope pane.	Envelope Information, page 71
	Click the Party tab to open the Party Information pane.	Party Information, page 76
	Click the File tab to open the Filing Information pane.	Filing Information, page 91
	Click the Serve tab to open the Service Contact Information pane.	Service Contact Information, page 101

Tab	Description	Location In the Document
	Click the Fees tab to open the Fees and Payment Information pane.	Fees and Payment Information, page 102
	Click the Charge tab to view the charges information for the specified case. Note: The Charge tab is displayed only when the case in the envelope is a criminal case type.	Charge Information, page 105

Other Icons

Icon/Field Name	Description	Location In the Document
	Click the Action Menu icon to open the action menu. From here, you can access the envelope details, service contacts, and action history for a specified envelope.	The Action Menu icon is available from the following pages in the eFile & Serve Review Queue: <ul style="list-style-type: none"> • <i>Review Queue</i> page • <i>Review History</i> page • <i>Envelope Lookup</i> page
	Click the Lock icon to unlock a document that is under review. Note: You must have permission to unlock an envelope that another reviewer has opened.	The Lock icon is available on the <i>Review Queue</i> page.

Document Viewer 1 Pane

Note: The icons in the following table are only found in Viewer 1. Refer to Document Viewer 2, page 121 for descriptions of the icons that are found in Viewer 2.

Icon/Field Name	Description	Location In the Document
N/A	Use the Document Viewer to review the lead document and attachments, if applicable.	Document Viewer 1, page 113
	View the filing code for the envelope that you are reviewing. Note: The example shows just one possible filing code. Note that various filing codes can be configured in your application.	Document Viewer 1, page 113
	Select the document to review from the document selector drop-down list.	Document Viewer 1, page 113

Icon/Field Name	Description	Location In the Document
	Click the Download link to download the original document.	Document Viewer 1, page 113
	Click the Thumbnail icon to open a Thumbnail view of the document pages for the selected document. Note: This icon is a toggle that opens or closes the Thumbnail view.	Document Viewer 1, page 113
	Click the Process Notes icon to add a process note or to view process notes that were previously added. Note: This icon is a toggle that opens or closes the Process Notes pane. An asterisk indicates that a process note has been added to the document.	Document Viewer 1, page 113 Process Notes, page 115
	Click the Zoom Out icon to zoom out of the current view of the document.	Document Viewer 1, page 113
	Click the Zoom In icon to zoom in from the current view of the document.	Document Viewer 1, page 113
	Select the size of the document from the Fit To Page drop-down list.	Document Viewer 1, page 113
	Click the Insert Text icon to insert text into the document.	Document Viewer 1, page 113
	Click the Draw a Line icon to draw a line in the document.	Document Viewer 1, page 113
	Click the Draw Highlight icon to draw a highlight in the document.	Document Viewer 1, page 113
	Click the Rotate Document icon to rotate the document.	Document Viewer 1, page 113
	Click the Font Drop-Down icon to access font and line choices.	Document Viewer 1, page 113
	Click the Redaction icon to open the redacted document in the <i>Redaction Viewer</i> window.	Document Viewer 1, page 113 Redaction, page 117
	Click the Refresh Redaction icon to refresh the redactions.	Document Viewer 1, page 113 Redaction, page 117

Actions/Stamps Panes

Icon/Field Name	Description	Location In the Document
	<p>Click the Accept icon to open the <i>Accept Filing</i> dialog box.</p> <p>Note: This feature is configured by Tyler and may not be available in your application.</p>	<p>Accepting a Filing, page 140</p>
	<p>Click the Return icon to open the <i>Return Filing</i> dialog box.</p> <p>Note: Some configurations may contain different wording in this dialog box.</p>	<p>Returning a Filing, page 142</p>
	<p>Click the Submission Fail icon to open the <i>Fail Submission</i> dialog box.</p> <p>Note: This feature is configured by Tyler and may not be available in your application.</p>	<p>Failing Submission of a Filing, page 146</p>
	<p>Click the Forward icon to open the <i>Forward Filing</i> dialog box.</p> <p>Note: This feature is configured by Tyler and may not be available in your application.</p>	<p>Forwarding an Envelope, page 147</p>
	<p>Click the Manual Accept icon to open the <i>Manual Accept</i> dialog box.</p> <p>Note: This feature is configured by Tyler and may not be available in your application.</p>	<p>Manually Accepting a Filing, page 148</p>
	<p>Click the Send Back to Filer icon to open the <i>Send Back to Filer</i> dialog box.</p> <p>Note: This feature is configured by Tyler and may not be available in your application.</p>	<p>Sending a Filing Back to the Filer, page 148</p>
	<p>Click the Defer icon to open the <i>Defer Filing</i> dialog box.</p> <p>Note: This feature is configured by Tyler and may not be available in your application.</p>	<p>Deferring Review of an Envelope, page 149</p>

Icon/Field Name	Description	Location In the Document
	<p>Click the End Review icon to end the review of the envelope.</p>	<p>Ending Review of an Envelope, page 149</p>
	<p>Click the Grant Filing icon to open the <i>Grant Filing</i> dialog box.</p> <p>Note: This feature is available only to reviewers of proposed orders who have “Judicial Disposition Officer” rights, when those rights are configured.</p>	<p>Granting a Filing, page 212</p>
	<p>Click the Deny Filing icon to open the <i>Deny Filing</i> dialog box.</p> <p>Note: This feature is available only to reviewers of proposed orders who have “Judicial Disposition Officer” rights, when those rights are configured.</p>	<p>Denying a Filing, page 212</p>
	<p>Click the Moot Filing icon to open the <i>Moot Filing</i> dialog box.</p> <p>Note: This feature is available only to reviewers of proposed orders who have “Judicial Disposition Officer” rights, when those rights are configured.</p>	<p>Mooting a Filing, page 213</p>
	<p>Click the Return to Filer icon to open the <i>Return to Filer</i> dialog box.</p> <p>Note: This feature is available only to reviewers of proposed orders who have “Judicial Disposition Officer” rights, when those rights are configured.</p>	<p>Returning a Filing to the Filer, page 214</p>
	<p>Click the Delete Filing icon to open the <i>Delete Filing</i> dialog box.</p> <p>Note: This feature is available only to reviewers of proposed orders who have “Judicial Disposition Officer” rights, when those rights are configured.</p>	<p>Deleting a Filing, page 214</p>

Icon/Field Name	Description	Location In the Document
	Click the Text Stamps icon to open the Text Stamps pane.	Add Stamps, page 118
	Click the Image Stamps icon to open the Image Stamps pane.	Add Stamps, page 118

Additional Envelope Options

You can access some additional envelope options from various locations in the eFile & Serve Review Queue. The options that you can access differ from each location.



The Action Menu icon () is available from three pages in the application. When you click the icon, an action menu for that location is displayed, offering more options.

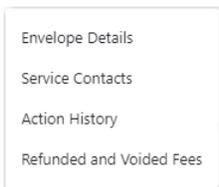


Figure 2.1 – Example of an Action Menu



The Action Menu icon () is available from the following pages:

- *Review Queue* page
- *Review History* page
- *Envelope Lookup* page

Envelope Details

You can view the details of an envelope from various places in the eFile & Serve Review Queue.



To view the envelope details, click the Action Menu icon (), which is located to the right of the Envelope

card on the *Review History* page and the *Envelope Lookup* page, and to right of the Lock icon () for the envelope listing on the *Review Queue* page. You can view the envelope details from the following pages in the application:

- *Review Queue* page
- *Review History* page
- *Envelope Lookup* page

Case # CV-2024-029392 - Envelope # 236860 PRINT CLOSE

Case

Case Number CV-2024-029392	Description John Doe vs Jane Smith vs John Public	Location OFS ModkCMS	Category Civil
Case Type Breach Of Contract	Status Open	Filed Date 04/17/2024 1:09 AM CDT	Lower Court/Agency #
Breach Of Contract Lower Court/Agency Case #	Judge Mock Judge Code		

Envelope

Submit Date 07/15/2024 2:48 PM CDT	Docket Date 07/15/2024 2:48 PM CDT	Hearing Date 07/15/2024 11:00 AM - 12:00 PM CDT
Filing Attorney Andrea [REDACTED]	Filed By [REDACTED]	
Filing Source OFS EFSP Filing Interface	Firm Name [REDACTED] and Associates	Firm Address 5101 Terryson Parkway, Suite 5000 Plano, Texas 75024
Firm Phone 972-913-3770	Filer Email [REDACTED]@terrytech.com	Filer Type

Existing Parties 3 Parties

Party Type	Party Name	Lead Attorney
Plaintiff	John W. Doe	UA-Attorney Valid
Defendant	Jane Q Smith	Jane Q Smith
Defendant	John C Public	

Filings 1 Filing(s)

Motions

Status Under Review	Filing Type EFile	Reference Number	Filing Description
Filing Comments	Filing Courtesy Copies	Filing Preliminary Notifications	Review Date

Motion Type
Motion Type - Motion

Documents

Component	Document Name	Description	Security	Download Version	Document Size
Lead Document	Redaction test.pdf	Motions	Public (T)	Original	42.26 KB

Figure 2.2 – Example of an Envelope Detail Page

Note: The Existing Parties section is displayed only for subsequent filings.

You can view the size of the documents associated with the envelope in the **Filings** section of the envelope details. The document size is displayed next to the link for the document.

Filings 2 Filing(s)

Addendum

Status Under Review	Filing Type EFileAndServe	Reference Number	Filing Description From EFSP
Filing Comments	Filing Courtesy Copies	Filing Preliminary Notifications	Review Date

Documents

Component	Document Name	Description	Security	Download Version	Document Size
Lead Document	Notice of Appeal Under Chapter 39-20-06.pdf	Addendum	Sealed - Criminal (G)	Original	402.68 KB

Service 2 Party(s) with Service

Search by Party Name Search by Service Contact

Blue, Green 2 Service Contact(s)

Other 1 Service Contact(s)

Parties with no Contacts for Service 1 Party(s) without Service

Search by Party Name

Party Name	Email Address	Address
Yellow, Orange		

Figure 2.3 – Example of the Filings Section in the Envelope Details

The **Service** section of the envelope details is collapsed until you expand it to show the service contacts for the case.

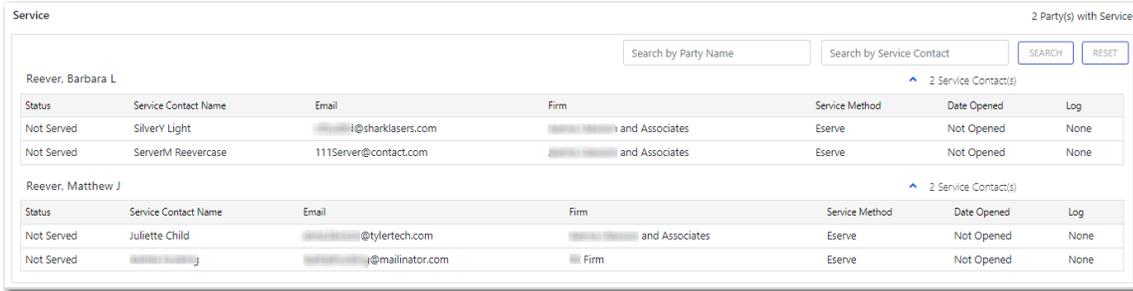


Figure 2.4 – Example of the Service Section with the Service Contacts Displayed

If there are parties on the case that have no contacts for service, the parties are displayed in a separate section on the *Envelope Detail* page.

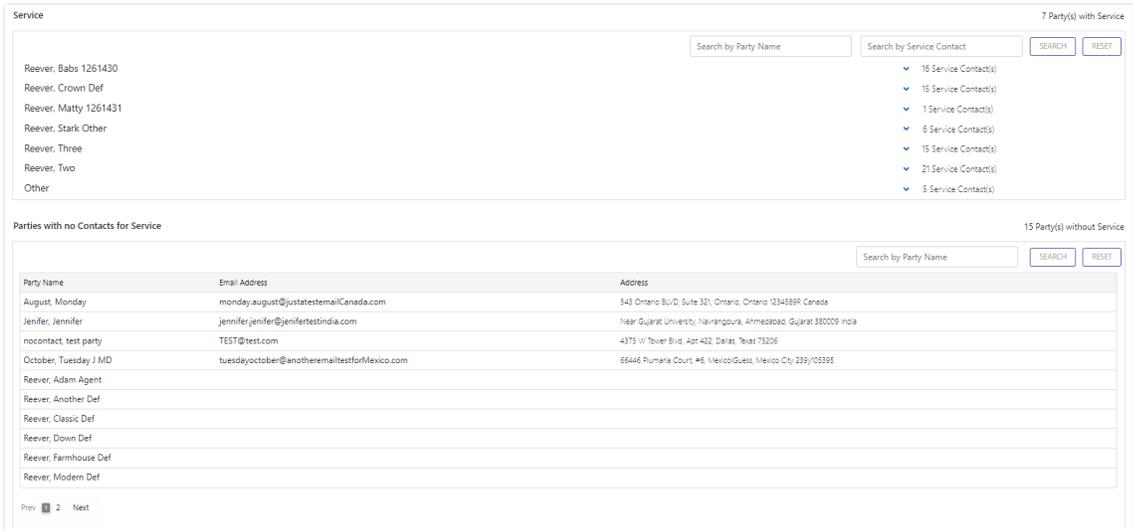


Figure 2.5 – Example of the Service Section with the Parties with no Contacts for Service Displayed

Service Contacts

You can view the service contacts for an envelope from various places in the eFile & Serve Review Queue.

To view the service contacts, click the Action Menu icon (), which is located to the right of the Envelope card on the *Review History* page and the *Envelope Lookup* page, and to right of the Lock icon () for the envelope listing on the *Review Queue* page. You can view the service contacts from the following pages in the application:

- *Review Queue* page
- *Review History* page
- *Envelope Lookup* page

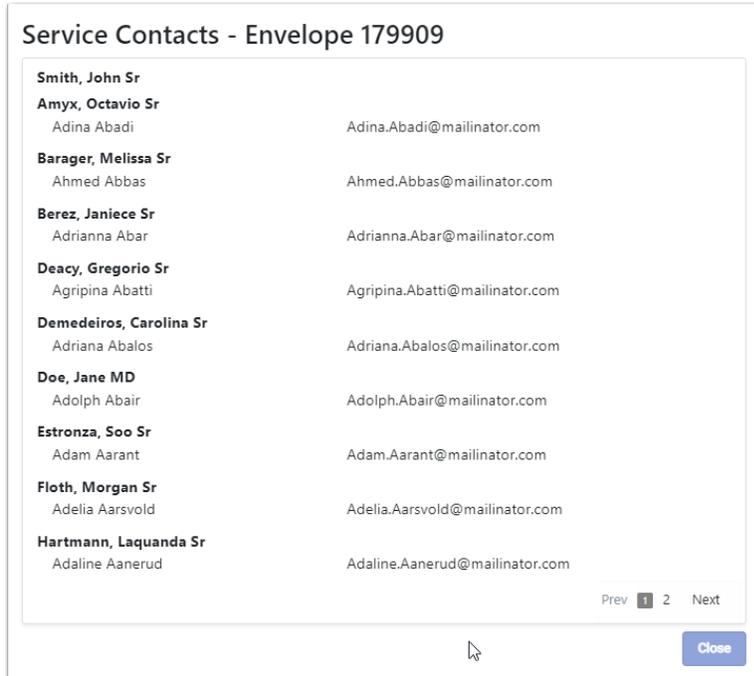


Figure 2.6 – Example of a Service Contacts Window

Envelope Action History

You can obtain the action history for an envelope from various places in the eFile & Serve Review Queue. The action history provides the entire history for the specified envelope. Actions taken on the envelope are listed in the *Envelope Action History* window, along with the user name, the filing code, the date and time when the action was taken, and the queue in which the envelope resides. In addition, if annotations have been added to the envelope, or if an existing annotation has been edited, the **SaveAnnotation** action is displayed in the **Action** column.



To obtain the action history, click the Action Menu icon (), which is located to the right of the Envelope

card on the *Review History* page and the *Envelope Lookup* page, and to right of the Lock icon () for the envelope listing on the *Review Queue* page. You can obtain the action history from the following pages in the application:

- *Review Queue* page
- *Review History* page
- *Envelope Lookup* page

Envelope Action History				
Envelope #235102				
User	Action	Filing Code	Date/Time	Queue
Automation Tylertest	Submitted		06/07/2024 9:52 PM CDT	Automation Queue
Automation Tylertest	Selected		06/07/2024 9:52 PM CDT	Automation Queue
Automation Tylertest	Selected		06/07/2024 9:52 PM CDT	Automation Queue
Automation Tylertest	Unlocked		06/07/2024 9:52 PM CDT	
Automation Tylertest	EndReview		06/07/2024 9:52 PM CDT	
[REDACTED]	Selected		06/10/2024 2:32 PM CDT	[REDACTED] Queue
[REDACTED]	Selected		06/10/2024 2:32 PM CDT	[REDACTED] Queue
[REDACTED]	Selected		06/10/2024 2:34 PM CDT	[REDACTED] Queue
[REDACTED]	Selected		06/10/2024 2:34 PM CDT	[REDACTED] Queue
[REDACTED]	SaveAnnotation-323951		06/10/2024 2:34 PM CDT	
[REDACTED]	Unlocked		06/10/2024 2:34 PM CDT	
[REDACTED]	EndReview		06/10/2024 2:34 PM CDT	

Figure 2.7 – Example of an Envelope Action History Window

System Requirements

The following list describes the required and recommended hardware and software for using the eFile & Serve Review Queue:

- **Browser Requirements**—The application supports Chrome™; Mozilla® Firefox®; Microsoft® Edge®; and Safari® browsers. If your browser does not meet these minimum requirements, contact your network administrator.
 - **Note: Internet Explorer® is not a supported browser.**
- **Operating Systems**—The application supports Microsoft® Windows®, Linux®, Chrome OS™, and OS X® desktop class operating system software.
- **Minimum Hardware Requirements**—The application supports the following hardware:
 - Intel® Core™ Duo processors or Advanced Micro Devices, Inc. (AMD) processors manufactured in 2012 or later
 - 2 gigabytes (GB) of random-access memory (RAM)
 - 1366 x 768 resolution screens for desktop computers
- **Recommended Hardware Requirements**—Tyler recommends the following hardware:
 - Intel® Core™ i3 or AMD A6 processors with at least a 2.0 GHz clock speed
 - 4 GB of RAM
 - 1920 x 1080 resolution for both desktop computers and mobile devices
- **Recommended Connection**—A high-speed Internet connection is recommended.

Keyboard Shortcuts

During your review of an envelope, you can press SHIFT+? from anywhere in the eFile & Serve Review Queue to view a list of keyboard shortcuts. Different shortcut options are available on different pages of the application. Press any shortcut key to access the location associated with the key that you pressed.

Keyboard shortcuts are available on the *Review Queue* page.

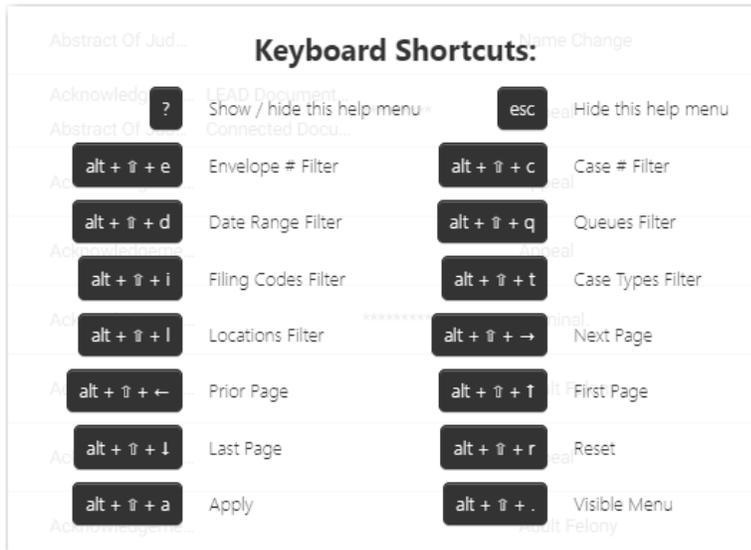


Figure 2.8 – Keyboard Shortcuts on the Review Queue Page

Keyboard shortcuts are available on the *Review History* page.

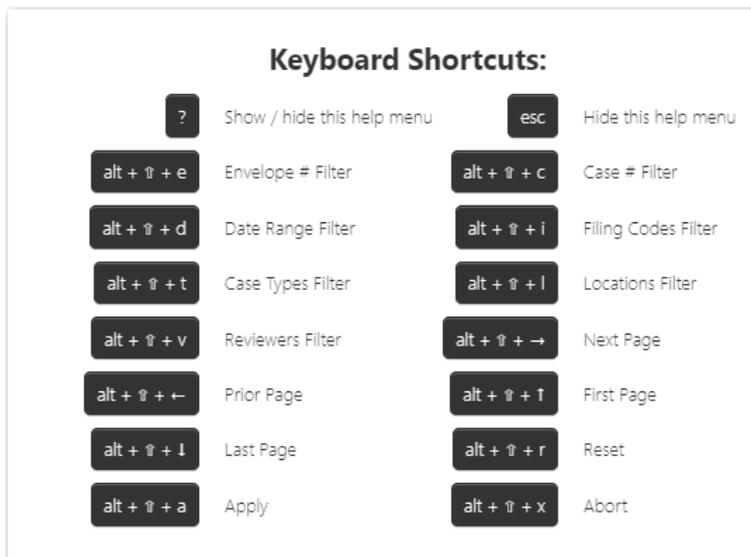


Figure 2.9 – Keyboard Shortcuts on the Review History Page

Keyboard shortcuts are available on the *Envelope Lookup* page.

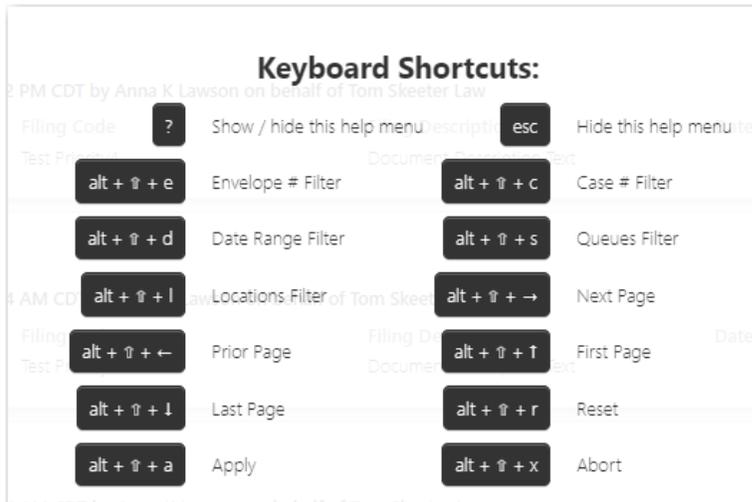


Figure 2.10 – Keyboard Shortcuts on the Envelope Lookup Page

Keyboard shortcuts are available in the Review Queue during an envelope review.

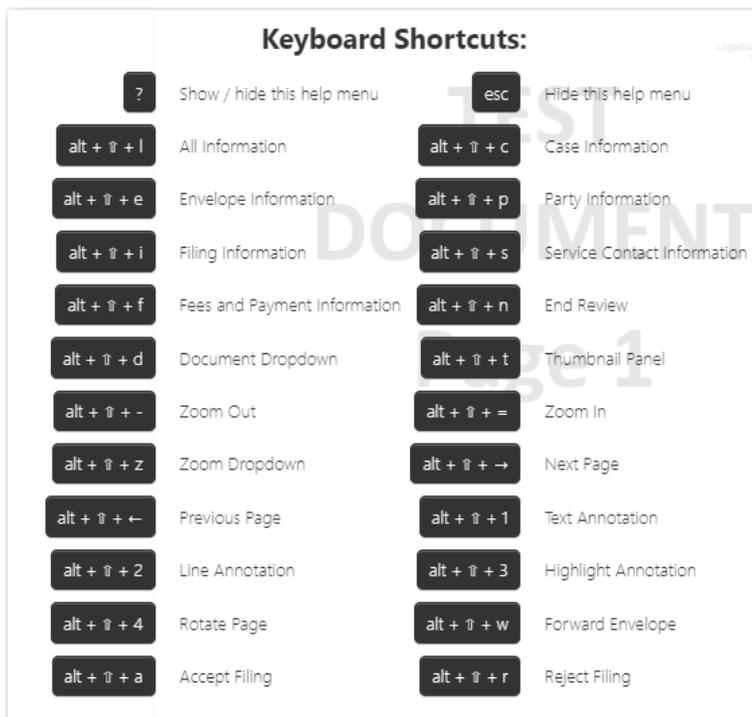


Figure 2.11 – Keyboard Shortcuts During an Envelope Review

Other Shortcuts

You can use shortcuts to perform some other actions in the eFile & Serve Review Queue.

On the *Review History* page, you can press ALT + SHIFT + V to expand or collapse the **Reviewer** filter.

On the *Envelope Lookup* page, you can press ALT + SHIFT + S to expand or collapse the **Status** filter.

Error Messages

The eFile & Serve Review Queue displays several error messages to alert you when you have not entered the required information or you have entered invalid information.

Required fields are indicated by a red asterisk or by helpful hints, depending on where you are working in the application. If you have not entered information in the required fields, you will receive error messages when you try to navigate to another place in the application.

3 Landing Page

Topics covered in this chapter

◆ Sign In and Sign Out

The landing page is the page on which you sign in to the eFile & Serve Review Queue.

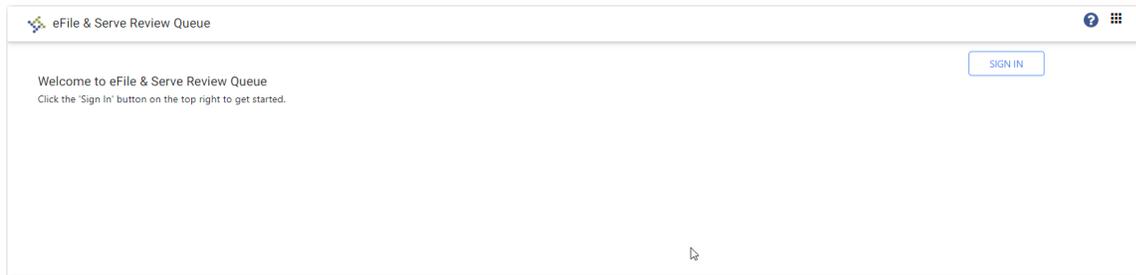


Figure 3.1 – eFile & Serve Review Queue Landing Page

Sign In and Sign Out

You must sign in to the eFile & Serve Review Queue to use the application. When you are done with your reviews, it is recommended that you sign out of the application.

Signing In

Sign in to the eFile & Serve Review Queue by using the user ID and password that was provided to you by your Court Administrator.

Note: If your account has been deactivated, a message is displayed when you attempt to sign in to the application. Follow the steps to reactivate your account. If your account has been suspended due to inactivity, a message is displayed. You cannot reactivate your account.

To sign in to the eFile & Serve Review Queue:

1. Navigate to the *Landing* page.

2. Click  .

The *Sign In* window is displayed.

The screenshot shows a 'Sign In' window with the following elements:

- Logo: Tyler Technologies Odyssey Identity Provider
- Message: Please sign in to continue
- User ID: [Input field]
- Password: [Input field]
- Sign In: [Button]
- Forgot Password?: [Link]
- CLOSE: [Button]

Figure 3.2 – Example of a Sign In Window

Note: If your application is configured for two-factor authentication, a different sign-in window will be displayed. Follow the prompts to sign in to the application.

3. Type your user ID and password (which is case-sensitive).

4. Click .

The *Review Queue* page is displayed.

Signing Out

It is recommended that you sign out of the eFile & Serve Review Queue when you are done using the application.

To sign out of the eFile & Serve Review Queue:

1. From the drop-down list at the top of the page, click .

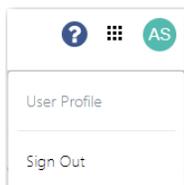


Figure 3.3 – Sign Out Drop-Down List

You are now signed out of the eFile & Serve Review Queue.

Deactivated Account

If you have not signed in to the eFile & Serve Review Queue for a specified period of time, your account will be deactivated. The next time you attempt to sign in to the application, a message is displayed indicating that your account has been deactivated.

Note: The amount of time that elapses before your account is deactivated is configured by Tyler.

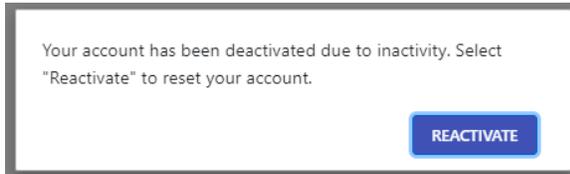


Figure 3.4 – Example of a Message for a Deactivated Account

If your account has been deactivated and you want to reactivate it, click **Reactivate**.

Follow the prompts to reset your password and reactivate your account.

Resetting a Password

You can reset a password that you have forgotten. You can also reset a password if your account has been deactivated and you want to reactivate it.

To reset your password:

1. Do one of the following:
 - For a forgotten password, from the *Sign In* page, click **Forgot Password?**
 - From the deactivation message, click **Reactivate**.

The password reset window is displayed.

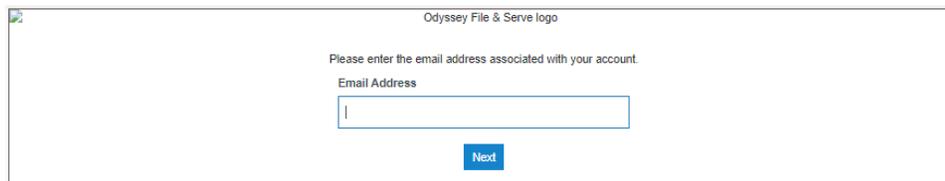


Figure 3.5 – Example of the Password Reset Window

2. Type your email address in the **Email Address** field. Then, click **Next**.

The *reCAPTCHA* window is displayed.

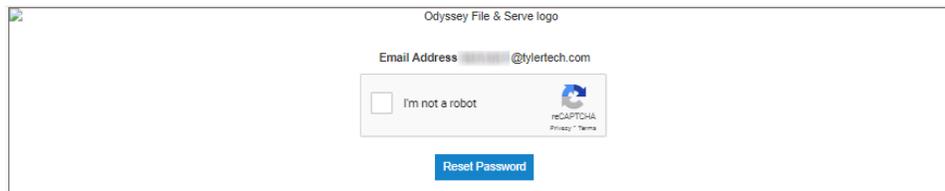


Figure 3.6 – Example of the reCAPTCHA Window

3. Select the **I'm not a robot** check box.

A window is displayed from which you must select specified images.

Note: Depending on your browser, you may not see the images.

4. Click the requested images, and then click **Verify**.
5. After selecting the correct images, click **Reset Password**.
6. Continue to follow the prompts to reset your password.

Suspended Account

If you have not signed in to the eFile & Serve Review Queue for an extended period of time, your account will be suspended. If your account has been suspended, you cannot reactivate it.

Note: The amount of time that elapses before your account is suspended is configured by Tyler.

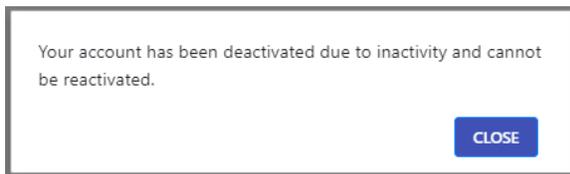


Figure 3.7 – Example of a Suspended Account Message

If you receive a message about a suspended account, click **Close**.

4 User Profile

Topics covered in this chapter

- ◆ View Account Tab
- ◆ Manage Notifications Tab
- ◆ Reviewer Preferences Tab

You can access your user profile from the drop-down list that is available when you click the Initials icon in the top right section of the eFile & Serve Review Queue.

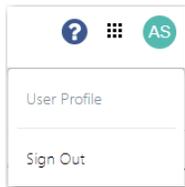


Figure 4.1 – Example of a Drop-Down List

The *User Profile* page includes the following tabs:

- **View Account** tab—Allows you to change your password or your user name
- **Manage Notifications** tab—Allows you to select the email notifications that you want to receive regarding your filings
- **Reviewer Preferences** tab—Allows you to set your preferences for working in the Review Queue

View Account Tab

You can change your password or your user name on the **View Account** tab on the *User Profile* page.

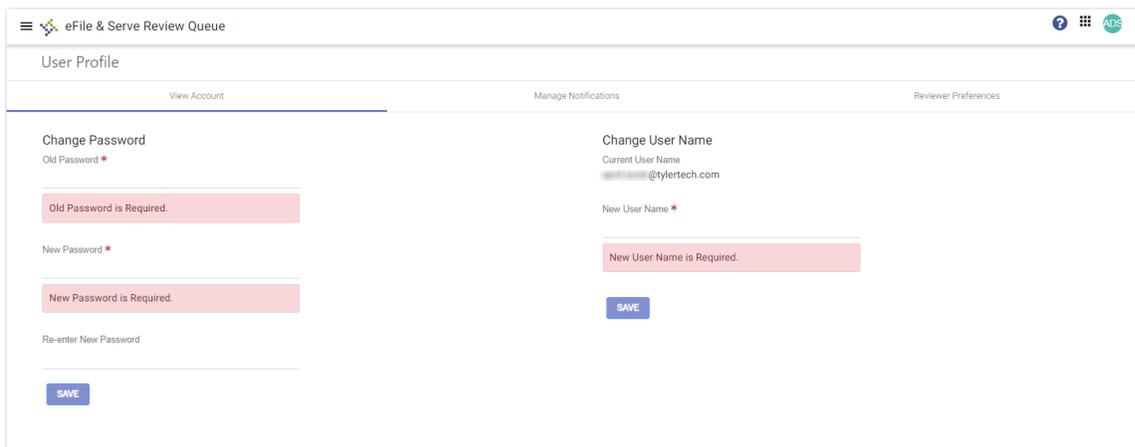


Figure 4.2 – Example of the View Account Tab on the User Profile Page

Perform the following actions to make changes on the **View Account** tab:

- To change your password, type the current password in the **Old Password** field. Then, type the new password in the **New Password** field, and again in the **Re-enter New Password** field. Then,

click .

- To change your user name, type the new user name in the **New User Name** field. Then, click

.

Manage Notifications Tab

You can manage your preferences for notifications regarding your filings.

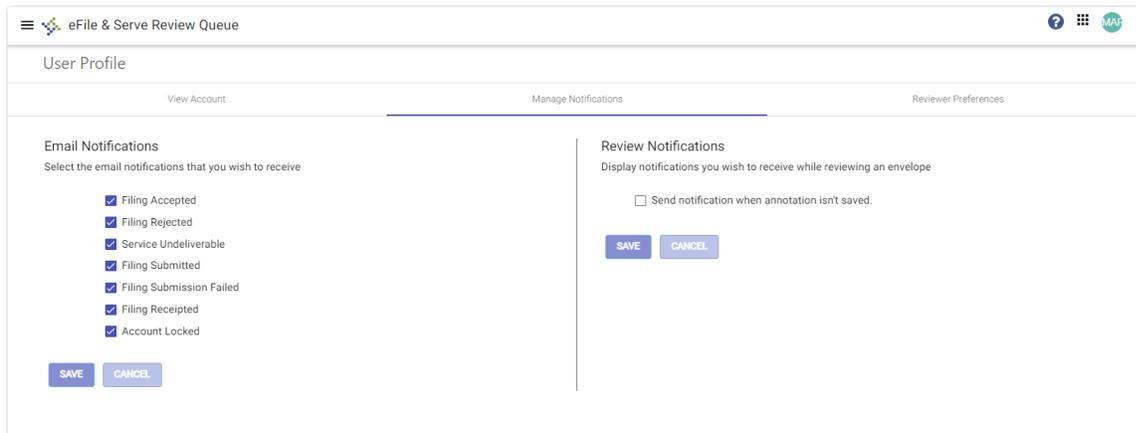


Figure 4.3 – Example of the Manage Notifications Tab on the User Profile Page

Perform the following actions to manage your notifications:

- For email notifications, select the check boxes for each type of notification that you want to receive

regarding your filings. Then, click .

- If you want to be notified when an annotation is not saved, select the **Send notification when**

annotation isn't saved. check box. Then, click .

When you select this option, a message is displayed when you accept a filing if you did not add a stamp to the PDF document that you were reviewing.

Reviewer Preferences Tab

You can select your preferences for how you want to work in the eFile & Serve Review Queue.

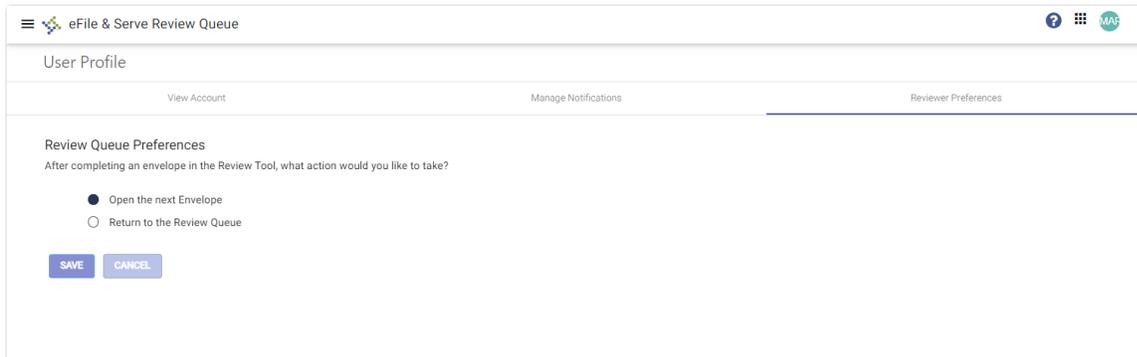


Figure 4.4 – Example of the Reviewer Preferences Tab on the User Profile Page

In the **Review Queue Preferences** section, select the option for how you want to work in the eFile & Serve Review Queue. Then, click  .

5 Review Queue Page

Topics covered in this chapter

- ◆ Begin Document Review
- ◆ Queue Prioritization
- ◆ Scheduled Queue Rerouting
- ◆ Filing Blackout Dates
- ◆ Filter Filings
- ◆ Abort Search
- ◆ Grace Period
- ◆ Viewing Copied Envelope Information
- ◆ Viewing Envelope Details from the Review Queue Page
- ◆ Viewing Service Contacts from the Review Queue Page
- ◆ Viewing the Action History from the Review Queue Page
- ◆ Audit Log

When you sign in to the eFile & Serve Review Queue, the *Review Queue* page is displayed.

Filters	Envelope #	Case #	Submit Date	Status	Filing Code	Filing Description	Case Title	Case Type	Judge	Filed By	Filing Attorney	Queue	Reviewer	Lock
Envelope #	202846	CC-23-1890	06/27/2023 9:03 AM CDT	Under Review	Acknowledgeme...		Division Of Prop...				aa2 aa2	Default		🔒
Case #	202967		06/28/2023 3:09 PM CDT	Submitted	Acknowledgeme...		Appeal				Magnolia Cat	Default		🔒
	203085		06/29/2023 9:04 AM CDT	Under Review	Acknowledgeme...		Appeal			John Allan Smith	Mary S Adams	Default	Pareesh Soni	🔒
Bulk #	203228	CC-23-1890	06/30/2023 2:55 PM CDT	Under Review	Acknowledgeme...		Division Of Prop...				firm attorney	Default		🔒
Date Range	203534	CC-22-2717	07/05/2023 9:48 AM CDT	Under Review	Acknowledgeme... Addendum		Matty Reeverv.B... Breach Of Contr...				Mary S Adams	Default	test oka	🔒
Queues	203535	CC-22-2717	07/05/2023 10:19 AM CD	Under Review	Acknowledgeme... Addendum		Matty Reeverv.B... Breach Of Contr...				firm attorney	Default	April D Scott	🔒
Filing Codes	203727		07/10/2023 9:44 AM CDT	Under Review	Certificate w/ Do... Complaint - w/ H... ServiceContacts	*****	City Ordinance C...					Default		🔒
Case Types	203729		07/10/2023 10:11 AM CD	Under Review	Certificate w/ Do... Complaint - w/ H... ServiceContacts		City Ordinance C...					Default		🔒
Locations	203730		07/10/2023 10:12 AM CD	Under Review	Certificate w/ Do... Complaint - w/ H... ServiceContacts		City Ordinance C...					Default		🔒
Organizations	203732		07/10/2023 10:19 AM CD	Under Review	Acknowledgeme... Abstract Of Jud...		Appellate Case				aa2 aa2	Default		🔒
<input type="checkbox"/> Show Deferred	203734		07/10/2023 10:26 AM CD	Under Review	Acknowledgeme...		Appellate Case				Mary S Adams	Default		🔒
<input type="checkbox"/> Auto-Refresh	203735		07/10/2023 10:29 AM CD	Under Review	Acknowledgeme...		Appellate Case				Mary S Adams	Default		🔒
RESET APPLY	203736		07/10/2023 10:31 AM CD	Under Review	Acknowledgeme...		Division Of Prop...				Mary S Adams	Default		🔒
	203744		07/10/2023	Under Review	Acknowledgeme...		Division Of Prop...					Default		🔒

Figure 5.1 – Example of the Review Queue Page

The *Review Queue* page displays a list of the envelopes currently in the queue. You can choose to sort the items in the queue in ascending or descending order if you see a drop-down arrow to the right of a column header, such as the envelope number or submit date. The default view is descending order by the date on which the envelope was submitted. When you select a sort order, the filter for that sort order is displayed at

the top of the page. You can clear the filter by clicking **x** next to the specified filter, or clicking



Some envelopes in the queue are ready to be reviewed, and some envelopes are under review. If an envelope is under review and locked by another reviewer, you cannot access that envelope. You can click an envelope that is not locked by another reviewer to begin reviewing that envelope. You can also create a filter to search for specific envelopes or cases to review.

Note: You can unlock an envelope that is currently locked if you have “Court Administrator” rights.



Click the closed Lock icon () to unlock the envelope.

The following information is displayed in the queue if it is selected by the reviewer:

- Whether envelopes can be rerouted in the queue to another reviewer
- Envelope number
- Case number
- Bulk number
- Date on which the envelope was submitted
- Date to which the envelope is deferred
- Location of the envelope
- Status of the case filing
- Filing code
- Filing description
- Case title
- Case type
- Judge assigned to the case
- Filer who filed the case
- Filing attorney
- Queue in which the envelope is located
- Organization the envelope is associated with
- Reviewer who is currently reviewing a specified envelope
- Whether the envelope is locked by another reviewer or is available for review

- The option to view the *Envelope Detail* page (hover over the envelope row, and then click  to view the envelope details for the specified envelope)

- The option to view the service contacts for an envelope (hover over the envelope row, and then

click  to view the service contacts for the specified envelope)

- The option to view the envelope action history (hover over the envelope row, and then click  to view the action history for the specified envelope)

You can choose to view only the columns in the queue that are relevant to you. Click  at the top right of the *Review Queue* page to select your desired columns. The **Visible Columns** drop-down list is displayed. After you select the columns that you want to view, the columns are automatically resized. You cannot change the sizing of any column.

Note: The Deferred Until column is not visible by default, but it can be enabled if you need to view the information contained in this column. The information is populated by the date that is entered

in the *Defer Envelope* dialog box. In addition, the Bulk # column, the Location column, and the Organization column are not visible by default, but they can be enabled if you need to view the information contained in those columns.

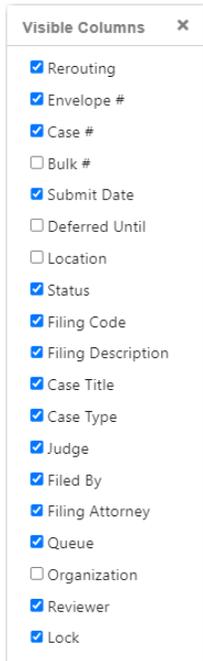


Figure 5.2 – Visible Columns Drop-Down List

You can move from page to page in the queue. Page numbers and arrows at the bottom of the *Review Queue* page indicate the page that is currently displayed, how many total envelopes are in the queue, and which direction you can go to navigate to another page.

You can move to another application or site from the *Review Queue* page if you want. Click  at the top right of the *Review Queue* page to access a customized list of the available application links.

Note: The available application links are configured by Tyler personnel.

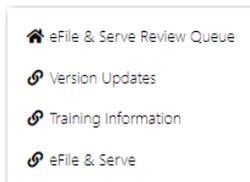


Figure 5.3 – Example of a Menu of Available Application Links

Begin Document Review

On the *Review Queue* page, locate the document that you want to review.

You can click an envelope that is displayed, and not locked, to begin your review; or you can create a filter to search for specific envelopes or cases to review. Click the link in the **Envelope #** column to begin your review of a specified envelope.

After you click an envelope link to begin your review, the first filing in the envelope is displayed. You can view information related to the envelope by clicking the specified tab in the pane on the left. When the envelope opens, the **All** tab and the case summary information are displayed. Also displayed is the Document Viewer pane, with the lead document of the first filing in the envelope displayed.

Note: The following example shows a document in Viewer 1. If Viewer 2 has been configured for your court, the basic panel and icons will differ from the ones shown in the example.

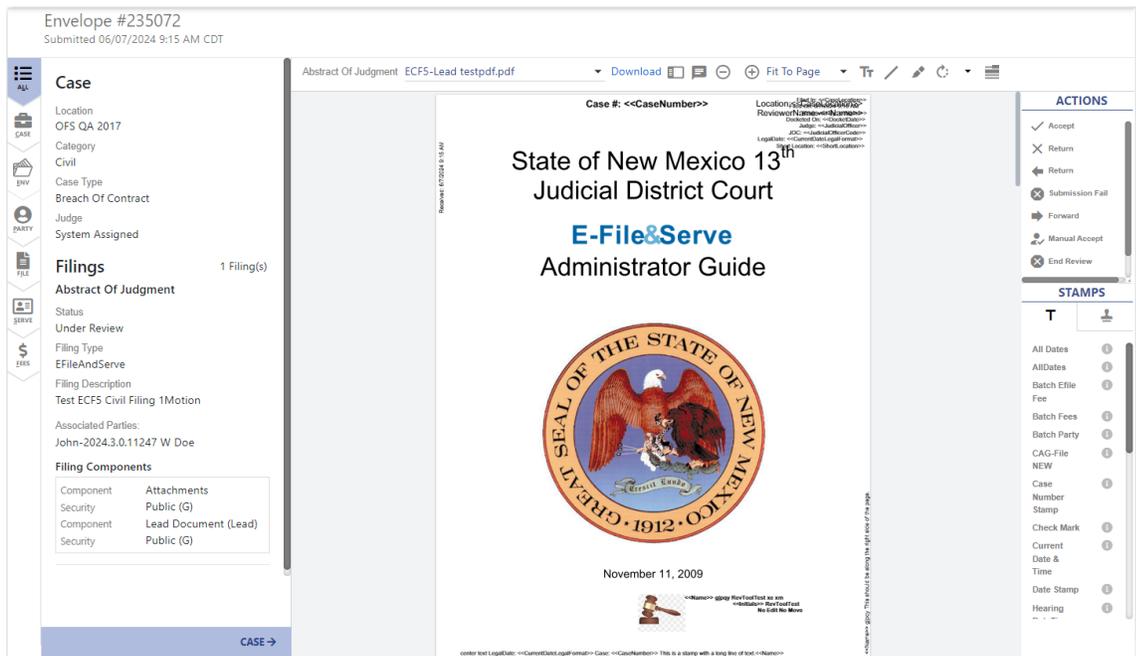


Figure 5.4 – Example of an Envelope in Review

When the envelope that you want to review is displayed, you can access the following panes:

- Case Information pane
- Envelope pane
- Party Information pane
- Filing Information pane
- Service Contact Information pane
- Fees and Payment Information pane
- Charges pane

Note: The Charges pane is displayed for criminal case envelopes.

You can select documents attached to the envelope from the document selector drop-down list, which is displayed above the Document Viewer pane. If the document you selected is large, the *Retrieving document* message is displayed in the top row of the Document Viewer.

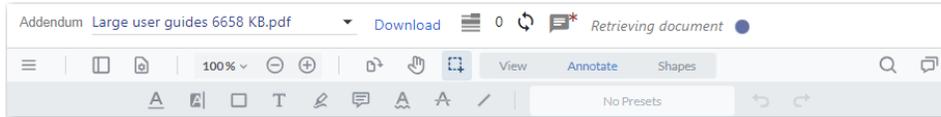


Figure 5.5 – Example of the Large Document Message During the Document Retrieval

While the document begins to download, the *Large Document* window is displayed.

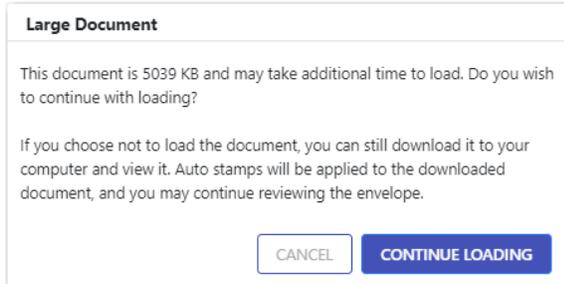


Figure 5.6 – Example of the Large Document Window

CONTINUE LOADING

To continue with the document download, click

If you decide to cancel the download, click **Cancel**. The document loading cancellation message is displayed.

Document loading cancelled. To continue reviewing the filing, select "Download" to download it to your computer. Auto stamps will be applied to the document after the filing is accepted.

Figure 5.7 – Example of a Document Loading Cancellation Message

When your document is open, you can add annotations to it from the annotations provided above the Document Viewer pane.

The right pane provides the following options for your document review:

- **Actions** option
- **Stamps** option

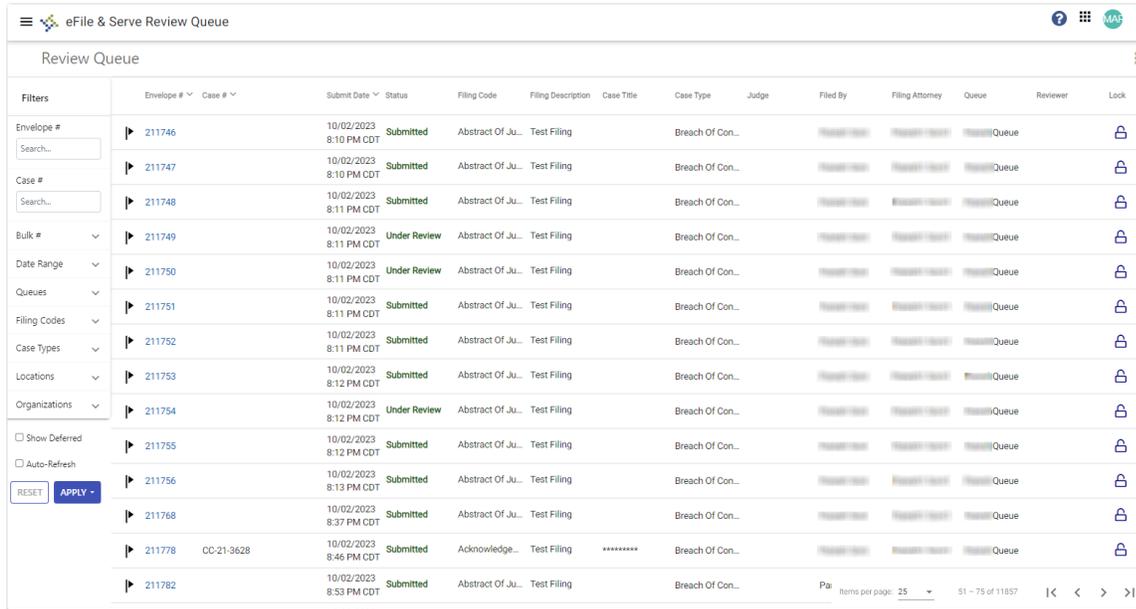
Note: At any time when the *Review Queue* page is displayed, select the **Auto-Refresh** check box to view a current list of the envelopes in the queue. When this check box is selected, the envelopes in the queue refresh every five minutes. Any filters that you have selected are retained with each new refresh.

Queue Prioritization

The Queue Prioritization feature is used to sort envelopes in the review queue so that the envelopes with higher priority are displayed at the top of the queue.

Note: This feature is configured by Tyler and may not be available in your application.

An envelope that is marked as high priority in the queue has a Priority Queue icon () displayed next to the envelope. The priority of the envelopes in the queue is configured by the court. The priority is determined by the first filing in the envelope.



eFile & Serve Review Queue														
Review Queue														
Filters	Envelope #	Case #	Submit Date	Status	Filing Code	Filing Description	Case Title	Case Type	Judge	Filed By	Filing Attorney	Queue	Reviewer	Lock
Envelope #	 211746		10/02/2023 8:10 PM CDT	Submitted	Abstract Of Ju...	Test Filing		Breach Of Con...				Queue		
Search...	 211747		10/02/2023 8:10 PM CDT	Submitted	Abstract Of Ju...	Test Filing		Breach Of Con...				Queue		
Case #	 211748		10/02/2023 8:11 PM CDT	Submitted	Abstract Of Ju...	Test Filing		Breach Of Con...				Queue		
Search...	 211749		10/02/2023 8:11 PM CDT	Under Review	Abstract Of Ju...	Test Filing		Breach Of Con...				Queue		
Bulk #	 211750		10/02/2023 8:11 PM CDT	Under Review	Abstract Of Ju...	Test Filing		Breach Of Con...				Queue		
Date Range	 211751		10/02/2023 8:11 PM CDT	Submitted	Abstract Of Ju...	Test Filing		Breach Of Con...				Queue		
Queues	 211752		10/02/2023 8:11 PM CDT	Submitted	Abstract Of Ju...	Test Filing		Breach Of Con...				Queue		
Filing Codes	 211753		10/02/2023 8:12 PM CDT	Submitted	Abstract Of Ju...	Test Filing		Breach Of Con...				Queue		
Case Types	 211754		10/02/2023 8:12 PM CDT	Under Review	Abstract Of Ju...	Test Filing		Breach Of Con...				Queue		
Locations	 211755		10/02/2023 8:12 PM CDT	Submitted	Abstract Of Ju...	Test Filing		Breach Of Con...				Queue		
Organizations	 211756		10/02/2023 8:13 PM CDT	Submitted	Abstract Of Ju...	Test Filing		Breach Of Con...				Queue		
<input type="checkbox"/> Show Deferred	 211768		10/02/2023 8:37 PM CDT	Submitted	Abstract Of Ju...	Test Filing		Breach Of Con...				Queue		
<input type="checkbox"/> Auto-Refresh	 211778	CC-21-3628	10/02/2023 8:46 PM CDT	Submitted	Acknowledge...	Test Filing	*****	Breach Of Con...				Queue		
<input type="button" value="RESET"/> <input type="button" value="APPLY"/>	 211782		10/02/2023 8:53 PM CDT	Submitted	Abstract Of Ju...	Test Filing		Breach Of Con...				Queue		

Figure 5.8 – Example of a Review Queue Page with Prioritization Icons Displayed

If you see a Priority Queue icon next to an envelope, hover over the icon to view the tooltip associated with that icon. The tooltip includes information about the priority that has been assigned to the specified envelope.

Scheduled Queue Rerouting

The Scheduled Queue Rerouting feature ensures that an envelope will not remain in its current queue past a specified date and time.

Note: This feature is configured by Tyler and may not be available in your application.

A queue can be configured so that envelopes in that queue are rerouted due to the length of time spent in the queue. When a queue is configured for rerouting, a Timer icon is displayed to the left of the envelope number for each envelope in the queue that is scheduled for rerouting. The Timer icon is displayed on the *Review Queue* page.

Review Queue														
Filters	Envelope #	Case #	Submit Date	Status	Filing Code	Filing Descript...	Case Title	Case Type	Judge	Filed By	Filing Attorney	Queue	Reviewer	Lock
Envelope # Search...	200245		05/24/2023 9:10 PM CDT	Submitted	Abstract Of ...	Test Filing		Breach Of C...				Queue		
Case # Search...	200246		05/24/2023 9:11 PM CDT	Submitted	Abstract Of ...	Test Filing		Breach Of C...				Queue		
Date Range	200247		05/24/2023 9:11 PM CDT	Submitted	Abstract Of ...	Test Filing		Breach Of C...				Queue		
Queues	200248		05/24/2023 9:11 PM CDT	Submitted	Abstract Of ...	Test Filing		Breach Of C...				Queue		
Filing Codes	200249		05/24/2023 9:11 PM CDT	Submitted	Abstract Of ...	Test Filing		Breach Of C...				Queue		
Case Types	200250		05/24/2023 9:12 PM CDT	Submitted	Abstract Of ...	Test Filing		Breach Of C...				Queue		
Locations	200251		05/24/2023 9:12 PM CDT	Submitted	Abstract Of ...	Test Filing		Breach Of C...				Queue		
Organizations	200252		05/24/2023 9:12 PM CDT	Submitted	Abstract Of ...	Test Filing		Breach Of C...				Queue		
<input type="checkbox"/> Show Deferred	200253		05/24/2023 9:12 PM CDT	Submitted	Abstract Of ...	Test Filing		Breach Of C...				Queue		
<input type="checkbox"/> Auto-Refresh	200254		05/24/2023 9:13 PM CDT	Submitted	Abstract Of ...	Test Filing		Breach Of C...				Queue		
RESET APPLY	200255		05/24/2023 9:13 PM CDT	Submitted	Abstract Of ...	Test Filing		Breach Of C...				Queue		
	200256		05/24/2023 9:14 PM CDT	Submitted	Abstract Of ...	Test Filing		Breach Of C...				Queue		
	200257		05/24/2023 9:14 PM CDT	Submitted	Abstract Of ...	Test Filing		Breach Of C...				Queue		
	200258		05/24/2023 9:15 PM CDT	Submitted	Abstract Of ...	Test Filing		Breach Of C...				Queue		

Figure 5.9 – Example of a Review Queue Page with Timer Icons Displayed

The rerouting information for the specified envelope is contained in a tooltip on the Timer icon. The tooltip lists the name of the queue to which the envelope will be moved if the review has not been started by the specified date and time. You can hover over the Timer icon to see which queue the envelope is scheduled to move to and on which date and time.

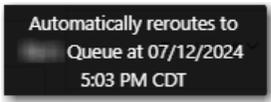


Figure 5.10 – Example of a Tooltip for an Envelope Scheduled for Rerouting

Filing Blackout Dates

Envelopes can be filed during a blackout period, and reviewers are notified upon signing in to the eFile & Serve Review Queue that one or more locations are currently unavailable. The notification is displayed on the *Review Queue* page when a user signs in to the eFile & Serve Review Queue.

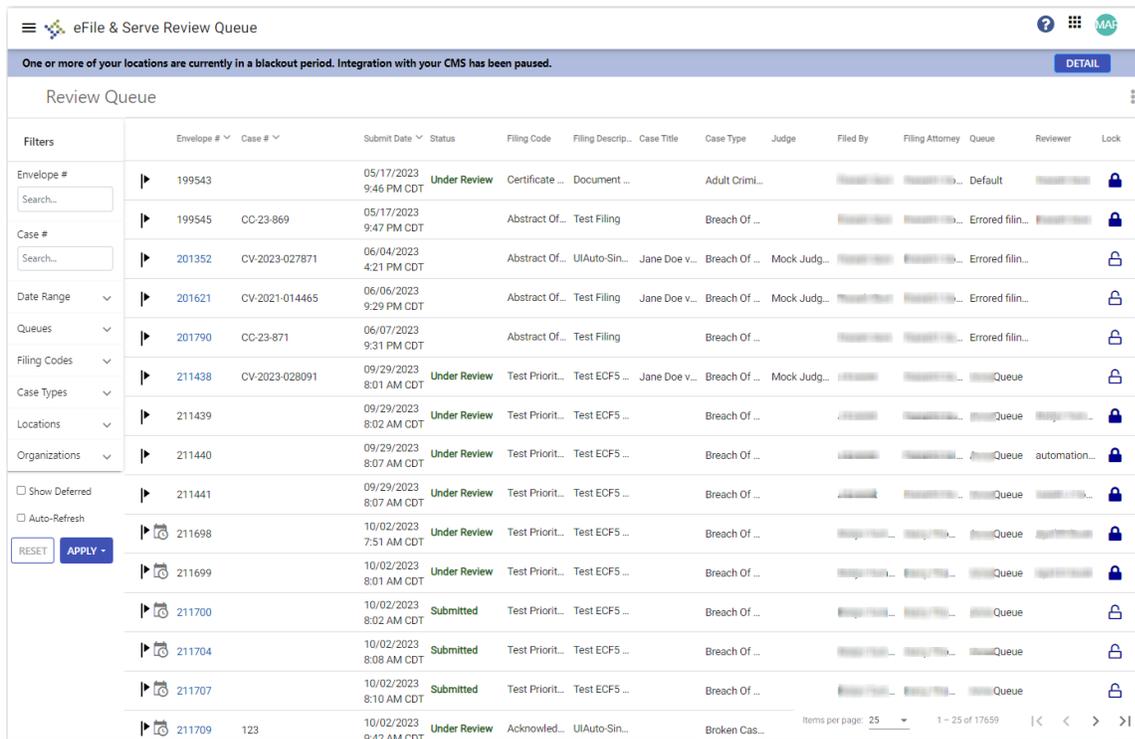


Figure 5.11 – Example of the Review Queue Page with the Blackout Period Notification Displayed

For more information about the specified blackout period, click



A window with a message is displayed.



Figure 5.12 – Example of a CMS Unavailable Window

If you want to see a list of the locations that are not available due to the blackout period, click the **Show**

unavailable locations link, and then click

A list of locations that are currently unavailable due to the blackout period is displayed.

Filter Filings

You can filter filings in the eFile & Serve Review Queue so that only the filings you want to see are displayed.

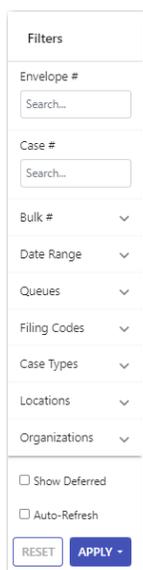


Figure 5.13 – Example of a Filters Pane

You can filter filings by using one or more of the following options:

- Envelope number
- Case number
- Bulk number
- Date range
- Queues
- Filing codes

- Case types
- Locations
- Organizations

If you want to see the deferred envelopes for a particular filter, select the **Show Deferred** check box. Then,

click .

Note: You can use the appropriate Apply option to save the current filter selection, reapply that filter after you have made other selections, or clear the saved filter selection.

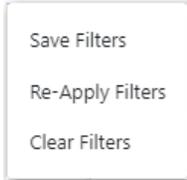


Figure 5.14 – Apply Action Menu

Note: To clear all selected filters, click .

The filters that you apply are displayed at the top of the *Review Queue* page.

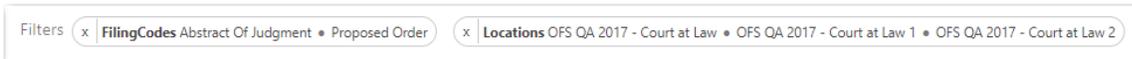


Figure 5.15 – Example of Applied Filters on the Review Queue Page

If you want to clear a filter from the top of the page, click **x**, and then click .



Figure 5.16 – Example of Applied Filters with the Apply Button Displayed

Note: The Apply button is displayed at the top of the page after you click **x** to remove a filter. After you click Apply, the button is no longer displayed at the top of the page. It is still displayed at the bottom of the Filters pane.

Note: At any time when the *Review Queue* page is displayed, select the Auto-Refresh check box to view a current list of the envelopes in the queue. When this check box is selected, the envelopes in the queue refresh every five minutes. Any filters that you have selected are retained with each new refresh.

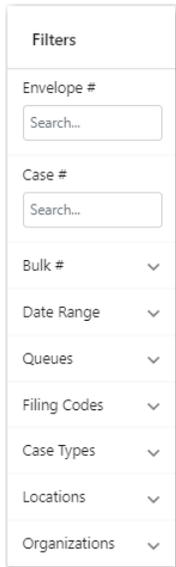
Filtering Filings by the Envelope Number

If you know the envelope number for the filing that you want to review, you can search for the specified envelope.

To search for a filing by the envelope number:

1. Sign in to the eFile & Serve Review Queue.

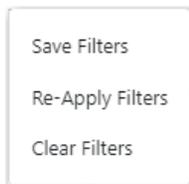
2. In the Filters pane, in the Envelope # pane, type the number of the envelope that you want to review.



The screenshot shows a vertical 'Filters' pane. At the top is the title 'Filters'. Below it are two search fields: 'Envelope #' and 'Case #', each with a 'Search...' placeholder. Below these are several dropdown menus: 'Bulk #', 'Date Range', 'Queues', 'Filing Codes', 'Case Types', 'Locations', and 'Organizations'.

Figure 5.17 – Envelope # Pane in the Filters Pane

3. Click  .
4. Use the appropriate **Apply** option to save your selected filters, reapply cleared filters, or clear the selected filters.



The screenshot shows a dropdown menu with three options: 'Save Filters', 'Re-Apply Filters', and 'Clear Filters'.

Figure 5.18 – Apply Action Menu

The envelope that you selected in your filter is displayed in the queue.

Note: To clear all selected filters, click  .

Filtering Filings by the Case Number

If you know the case number for the filing that you want to review, you can search for the specified case.

To search for a filing by the case number:

1. Sign in to the eFile & Serve Review Queue.
2. In the Filters pane, in the Case # pane, type the number of the case that you want to review.

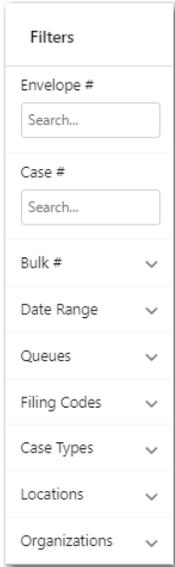


Figure 5.19 – Case # Pane in the Filters Pane

3. Click .
4. Use the appropriate **Apply** option to save your selected filters, reapply cleared filters, or clear the selected filters.

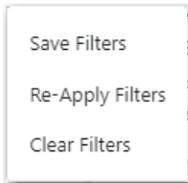


Figure 5.20 – Apply Action Menu

The envelopes associated with the case that you requested in your filter are displayed in the queue.

Note: To clear all selected filters, click .

Filtering Filings by the Bulk Number

If you know the number for the bulk that you want to review, you can search for the specified bulk.

To search for a filing by the bulk number:

1. Sign in to the eFile & Serve Review Queue.
2. In the Filters pane, in the Bulk # pane, type the number of the bulk that you want to review.

Filters

Envelope #

Case #

Bulk # ^

Date Range v

Queues v

Filing Codes v

Case Types v

Locations v

Organizations v

Figure 5.21 – Bulk # Pane in the Filters Pane

3. Click 

Review Queue ⋮

Filters Bulk # 290

Envelope #	Case #	Bulk #	Submit Date	Status	Filing Code	Filing Description	Case Title	Case Type	Judge	Filed By	Filing Attorney	Queue	Reviewer	Lock
228514	CC-24-095	290	04/09/2024 7:33 AM CDT	Submitted	Action - Subse...			Damages		QA1 Admin		Test Queue		
228515	CC-23-2784	290	04/09/2024 7:33 AM CDT	Submitted	Action - Subse...	Henrietta Tho...	Small Claims	Wagner, Albert		QA1 Admin		Test Queue		

Bulk #

Date Range v

Queues v

Filing Codes v

Case Types v

Locations v

Organizations v

Show Deferred
 Auto-Refresh

Figure 5.22 – Example of the Review Queue Page with the Bulk Filter Enabled

4. Use the appropriate **Apply** option to save your selected filters, reapply cleared filters, or clear the selected filters.

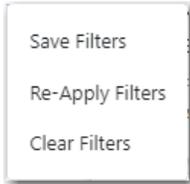


Figure 5.23 – Apply Action Menu

The bulk that you selected in your filter is displayed in the queue.

Note: To clear all selected filters, click  .

Filtering Filings by Date Range

You can filter the filings from a specified time frame that you want to review.

To filter filings for a specified time frame:

1. Sign in to the eFile & Serve Review Queue.
2. In the Filters pane, in the Date Range pane, select the dates for which you want to review the filings.

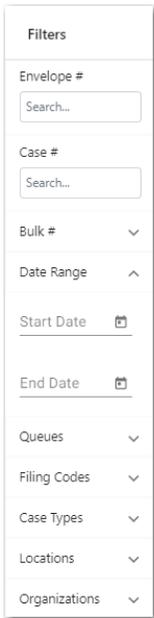


Figure 5.24 – Filters Pane with Date Range

3. Either click  , or type the dates in the **Start Date** and **End Date** fields.

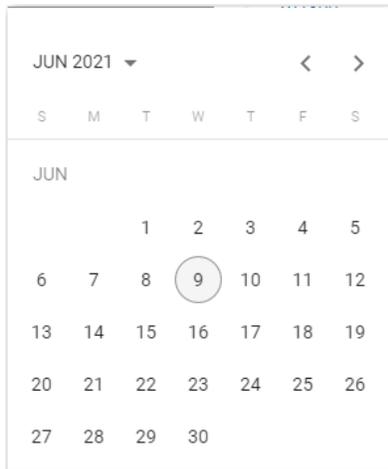


Figure 5.25 – Example of the Calendar

4. Click  .
5. Use the appropriate **Apply** option to save your selected filters, reapply cleared filters, or clear the selected filters.

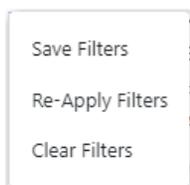


Figure 5.26 – Apply Action Menu

The filings for the time frame that you selected are displayed in the queue.

Note: To clear all selected filters, click

 .

Filtering Filings by Queue

You can filter the filings that you want to review according to the queue in which specific filings reside.

To filter filings by queue:

1. Sign in to the eFile & Serve Review Queue.
2. In the Filters pane, click **Queues** to expand the **Queues** drop-down list.

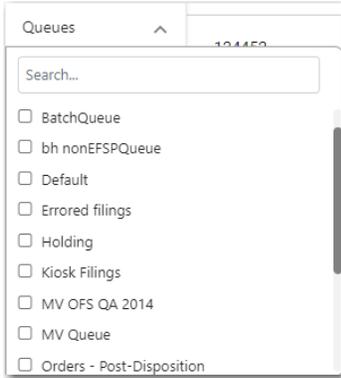


Figure 5.27 – Example of a Queues Drop-Down List in the Filters Pane

3. From the **Queues** drop-down list, select the queues that contain the filings that you want to review.
4. Filter the selection of queues by typing the name of the queue in the search field.



5. Click .
6. Use the appropriate **Apply** option to save your selected filters, reapply cleared filters, or clear the selected filters.

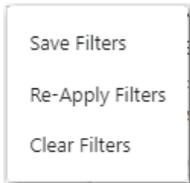


Figure 5.28 – Apply Action Menu

The queues that you selected in your filter are displayed in the review queue.

Note: To clear all selected filters, click .

Filtering Filings by Filing Codes

You can filter the filings that you want to review by the filing codes.

To filter filings by the filing code:

1. Sign in to the eFile & Serve Review Queue.
2. In the Filters pane, click **Filing Codes** to expand the **Filing Codes** drop-down list.

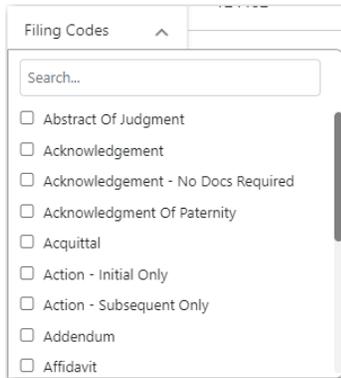


Figure 5.29 – Example of a Filing Codes Drop-Down List

3. From the **Filing Codes** drop-down list, select the filing codes that contain the filings that you want to review.
4. Filter the selection of filing codes by typing the name of the filing code in the search field.



5. Click .
6. Use the appropriate **Apply** option to save your selected filters, reapply cleared filters, or clear the selected filters.

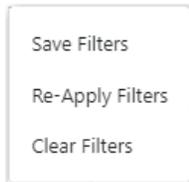


Figure 5.30 – Apply Action Menu

The filing codes that you selected in your filter are displayed in the queue.

Note: To clear all selected filters, click .

Filtering Filings by Case Types

You can filter the filings that you want to review by the case type.

To filter filings by the case type:

1. Sign in to the eFile & Serve Review Queue.
2. In the Filters pane, click **Case Types** to expand the **Case Types** drop-down list.

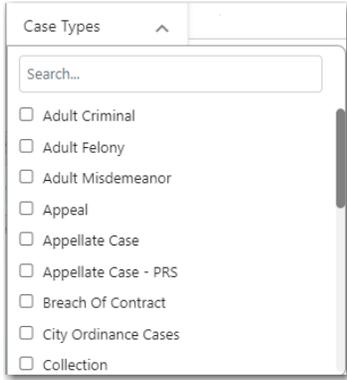


Figure 5.31 – Example of a Case Types Drop-Down List in the Filters Pane

3. From the **Case Types** drop-down list, select the case types that contain the filings that you want to review.
4. Filter the selection of case types by typing the name of the case type in the search field.



5. Click  .
6. Use the appropriate **Apply** option to save your selected filters, reapply cleared filters, or clear the selected filters.

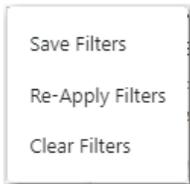


Figure 5.32 – Apply Action Menu

The case types that you selected for your filter are displayed in the queue.

Note: To clear all selected filters, click  .

Filtering Filings by Locations

You can filter the filings that you want to review by the locations of the filings.

To filter filings by locations:

1. Sign in to the eFile & Serve Review Queue.
2. In the Filters pane, click **Locations** to expand the **Locations** drop-down list.

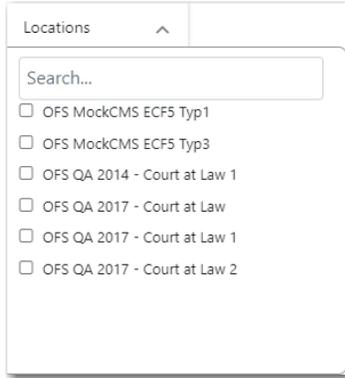
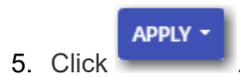


Figure 5.33 – Example of a Locations Drop-Down List in the Filters Pane

- From the **Locations** drop-down list, select the locations that contain the filings that you want to review.
- Filter the selection of locations by typing the name of the location in the search field.



- Click .
- Use the appropriate **Apply** option to save your selected filters, reapply cleared filters, or clear the selected filters.

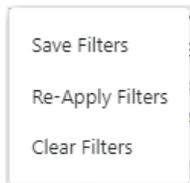


Figure 5.34 – Apply Action Menu

The locations that you selected for your filter are displayed in the queue.

Note: To clear all selected filters, click .



Filtering Deferred Filings

You can filter filings in the eFile & Serve Review Queue so that deferred filings are displayed.

To filter deferred filings:

- Sign in to the eFile & Serve Review Queue.
- In the Filters pane, select the **Show Deferred** check box to include deferred envelopes in the view.



Figure 5.35 – Show Deferred Check Box

- Click .

4. Use the appropriate **Apply** option to save your selected filters, reapply cleared filters, or clear the selected filters.

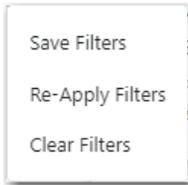


Figure 5.36 – Apply Action Menu

The envelopes that you selected in your filter are displayed in the queue.

Note: To clear all selected filters, click



Filtering Filings by Organizations

You can filter the filings that you want to review by the organizations that submitted the filings.

To filter filings by organizations:

1. Sign in to the eFile & Serve Review Queue.
2. In the Filters pane, click **Organizations** to expand the **Organizations** drop-down list.

Note: The organizations included in your drop-down list are the organizations' filings that you have permissions to review.

3. Select the organizations that contain the filings that you want to review.
4. Type the name of the organization to populate the selections.

5. Click



6. Use the appropriate **Apply** option to save your selected filters, reapply cleared filters, or clear the selected filters.

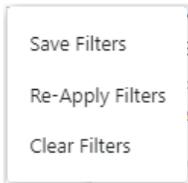


Figure 5.37 – Apply Action Menu

The organizations that you selected for your filter are displayed in the queue.

Note: To clear all selected filters, click



Abort Search

After you begin a search, you can stop the search before it has completed.

The ability to stop a search is available from the following locations in the eFile & Serve Review Queue:

- *Review Queue* page
- *Envelope Lookup* page
- *Review History* page

After you begin a search and before it has completed, click

A blue rectangular button with the text "ABORT SEARCH" in white, uppercase letters.

Your search will be stopped.

Grace Period

The grace period allows reviewers to keep the original filing and/or docket dates for returned or rejected envelopes.

If an envelope has been rejected, and the grace period for resubmitting the envelope has not yet expired, the envelope can be copied and resubmitted. The original docket date can be copied.

If the grace period has expired, a message is displayed indicating that the original filing date and the original docket date are no longer available.

Viewing a Copied Envelope During a Grace Period

You can view a copied envelope that was submitted during a grace period so that you can keep the original docket date for the specified envelope.

To view a copied envelope during a grace period:

1. From the *Review Queue* page, locate the envelope that you want to view.
2. Click the envelope

The envelope is displayed in the Document Viewer.

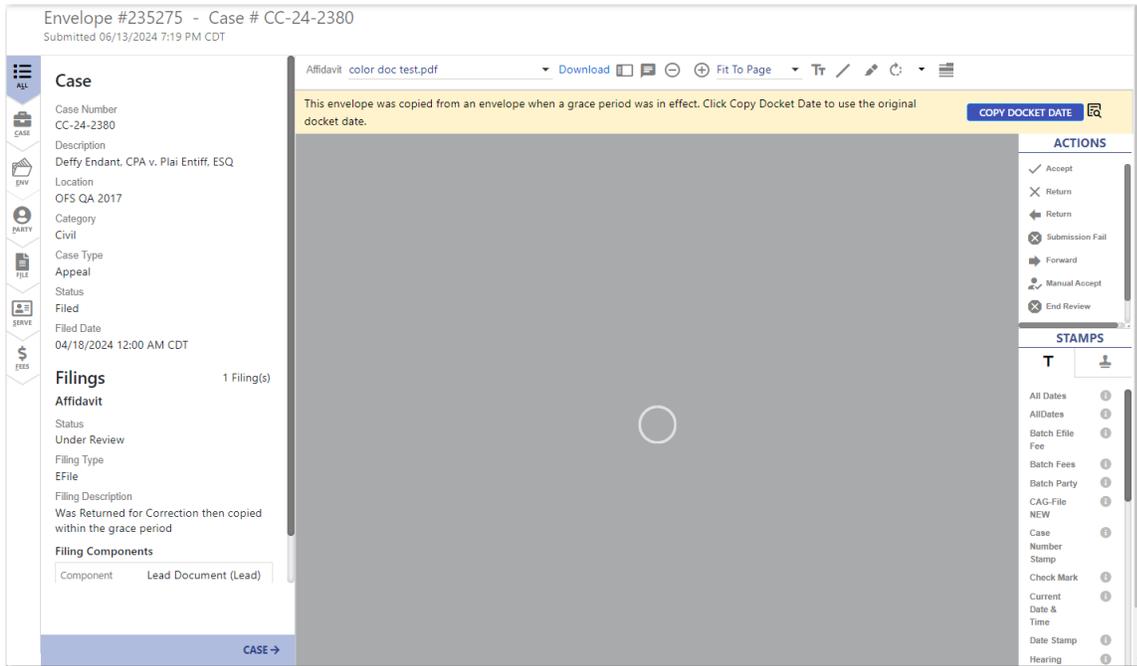


Figure 5.38 – Example of an Envelope Copied During the Grace Period

3. Click **COPY DOCKET DATE**.

A confirmation message is displayed.

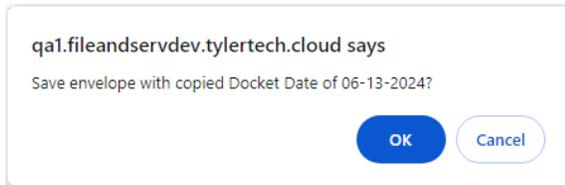


Figure 5.39 – Example of a Docket Date Confirmation Message

The envelope is saved with the original docket date.

Viewing Copied Envelope Information

When an envelope has been returned or rejected by the court, the filer can copy the envelope to make the necessary changes without creating a new envelope. The original envelope can still be displayed when the reviewer reviews the copied envelope.

Note: You must have “Reviewer” rights to perform the following steps.

To view copied envelope information:

1. Sign in to the eFile & Serve Review Queue.

The *Review Queue* page is displayed.

eFile & Serve Review Queue														
Review Queue														
Filters	Envelope #	Case #	Submit Date	Status	Filing Code	Filing Description	Case Title	Case Type	Judge	Filed By	Filing Attorney	Queue	Reviewer	Lock
Envelope # Search...	202846	CC-23-1890	06/27/2023 9:03 AM CDT	Under Review	Acknowledgeme...		Division Of Prop...				aa2 aa2	Default		🔒
Case # Search...	202967		06/28/2023 3:09 PM CDT	Submitted	Acknowledgeme...		Appeal				Magnolia Cat	Default		🔒
Bulk #	203085		06/29/2023 9:04 AM CDT	Under Review	Acknowledgeme...		Appeal			John Allan Smith	Mary S Adams	Default	Pareeh Soni	🔒
Date Range	203228	CC-23-1890	06/30/2023 2:55 PM CDT	Under Review	Acknowledgeme...		Division Of Prop...				firm attorney	Default		🔒
Queues	203534	CC-22-2717	07/05/2023 9:48 AM CDT	Under Review	Acknowledgeme... Addendum		Matty Reeverv B... Breach Of Contr...				Mary S Adams	Default	test okta	🔒
Filing Codes	203535	CC-22-2717	07/05/2023 10:19 AM CD	Under Review	Acknowledgeme... Addendum		Matty Reeverv B... Breach Of Contr...				firm attorney	Default	April D Scott	🔒
Case Types	203727		07/10/2023 9:44 AM CDT	Under Review	Certificate w/ Do... Complaint - w/ H... ServiceContacts	*****	City Ordinance C...					Default		🔒
Locations	203729		07/10/2023 10:11 AM CD	Under Review	Certificate w/ Do... Complaint - w/ H... ServiceContacts		City Ordinance C...					Default		🔒
Organizations	203730		07/10/2023 10:12 AM CD	Under Review	Certificate w/ Do... Complaint - w/ H... ServiceContacts		City Ordinance C...					Default		🔒
<input type="checkbox"/> Show Deferred	203732		07/10/2023 10:19 AM CD	Under Review	Acknowledgeme... Abstract Of Jud...		Appellate Case				aa2 aa2	Default		🔒
<input type="checkbox"/> Auto-Refresh	203734		07/10/2023 10:26 AM CD	Under Review	Acknowledgeme...		Appellate Case				Mary S Adams	Default		🔒
<input type="button" value="RESET"/> <input type="button" value="APPLY"/>	203735		07/10/2023 10:28 AM CD	Under Review	Acknowledgeme...		Appellate Case				Mary S Adams	Default		🔒
	203736		07/10/2023 10:31 AM CD	Under Review	Acknowledgeme...		Division Of Prop...				Mary S Adams	Default		🔒
	203744		07/10/2023	Under Review	Acknowledgeme...		Division Of Prop...					Default		🔒

Figure 5.40 – Example of a Review Queue Page

2. Locate the envelope that you want to review. Use the available filters, if necessary.
3. Click the envelope link to begin your review.

The envelope that you selected is displayed.

Note: A message is displayed indicating that the envelope you are reviewing was copied from another envelope.

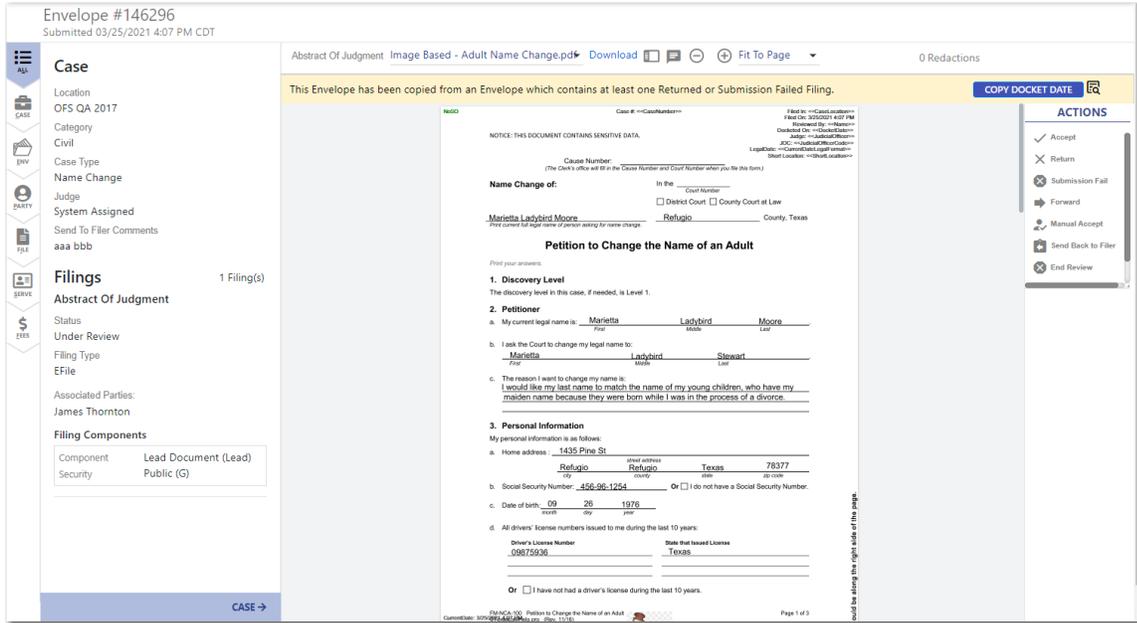


Figure 5.41 – Example of a Copied Envelope Under Review

4. Click **COPY DOCKET DATE** to copy the docket date from the original envelope to the copied envelope.
5. Click  to view the original envelope information displayed next to the copied envelope.

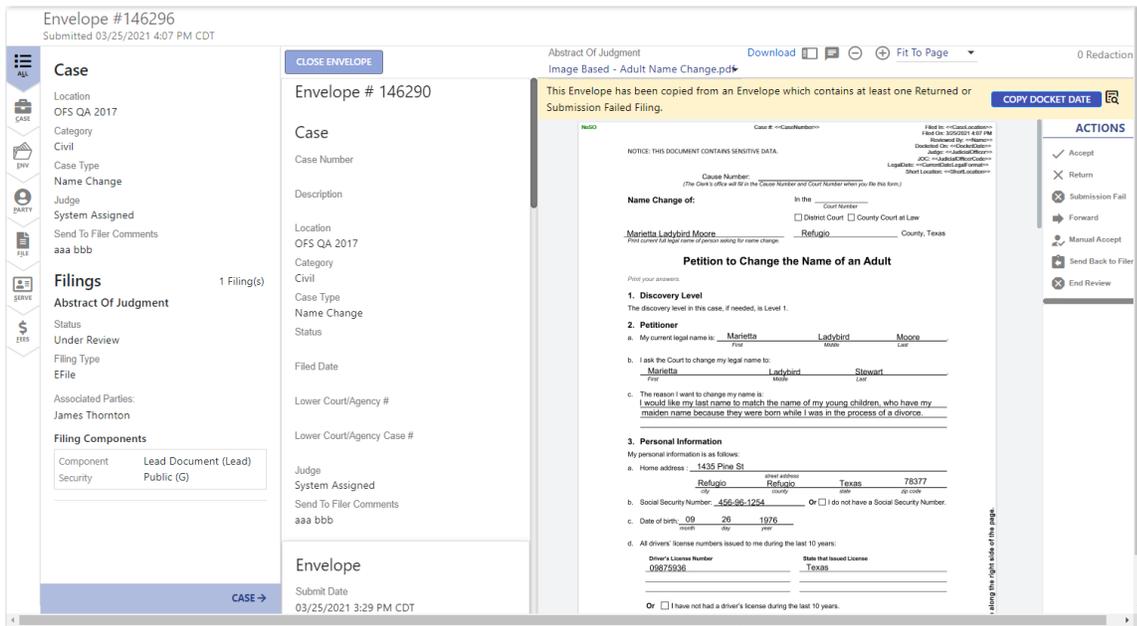


Figure 5.42 – Example of a Copied Envelope and the Original Envelope Information

6. Click **CLOSE ENVELOPE** when you are done viewing the original envelope information.

7. Continue with your review of the copied envelope.

Viewing Envelope Details from the Review Queue Page

You can view the details of an envelope from the *Review Queue* page.

To view the envelope details:

1. On the *Review Queue* page, hover over the envelope row.



The Action Menu icon () is displayed.

2. Click  , and then select **Envelope Details** from the action menu.

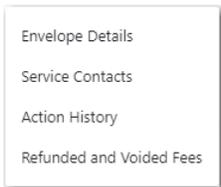


Figure 5.43 – Example of an Action Menu

The *Envelope Detail* page is displayed.

Case # CV-2024-029392 - Envelope # 236860
PRINT CLOSE

Case

Case Number CV-2024-029392	Description John Doe vs Jane Smith vs John Public	Location OFS MockCMS	Category Civil
Case Type Breach Of Contract	Status Open	Filed Date 04/17/2024 1:09 AM CDT	Lower Court/Agency #
Breach Of Contract Lower Court/Agency Case #	Judge Mock Judge Code		

Envelope

Submit Date 07/15/2024 2:48 PM CDT	Docket Date 07/15/2024 2:48 PM CDT	Hearing Date 07/15/2024 11:00 AM - 12:00 PM CDT
Filing Attorney Andrea	Filed By [Redacted]	
Filing Source OFS EFSF Filing Interface	Firm Name [Redacted] and Associates	Firm Address 5101 Terryson Parkway, Suite 5000 Plano, Texas 75024
Firm Phone 972-913-3770	Filer Email [Redacted]@terrytech.com	Filer Type

Existing Parties 3 Parties

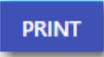
Party Type	Party Name	Lead Attorney
Plaintiff	John W. Doe	UA-Attorney Valid
Defendant	Jane Q Smith	Jane Q Smith
Defendant	John C Public	

Filings 1 Filing(s)

Motions	Filing Type	Reference Number	Filing Description
Status Under Review	EFile		
Filing Comments	Filing Courtesy Copies	Filing Preliminary Notifications	Review Date
Motion Type Motion Type - Motion			

Documents	Document Name	Description	Security	Download Version	Document Size
Component	Redaction test.pdf	Motions	Public (T)	Original	42.26 KB

Figure 5.44 – Example of an Envelope Detail Page

3. Click  if you want to print the envelope details. Then, click  to return to the *Review Queue* page.

Viewing Service Contacts from the Review Queue Page

You can view the service contacts for a specified envelope from the *Review Queue* page.

To view the service contacts:

1. On the *Review Queue* page, hover over the envelope row.

The Action Menu icon () is displayed.

2. Click , and then select **Service Contacts** from the action menu.

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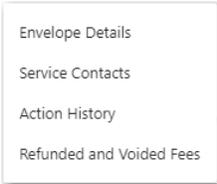


Figure 5.45 – Example of an Action Menu

The *Service Contacts* window for the specified envelope is displayed.

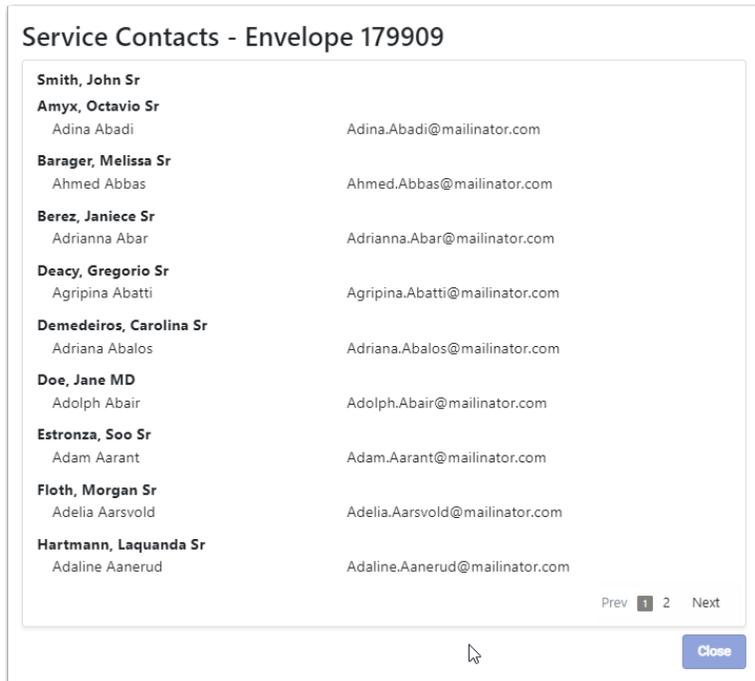


Figure 5.46 – Example of a Service Contacts Window

3. If you want to take further action on a service contact whose information is displayed, click  to the right of that service contact.

An action menu is displayed.

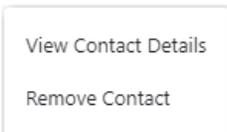


Figure 5.47 – Example of a Service Contact Action Menu

4. Click **Remove Contact** to remove the service contact from the envelope, or click **View Contact Details** for more information about the specified service contact.

Service Contact Details

First Name Portland	Middle Name	Last Name Oregon
Email portlandoregon@tylertech.com	Administrative Email(s)	Firm Name
Phone Number		
Country United States of America		
Address Line 1	Address Line 2	
City	State	Zip Code

Make this contact also Public

Created By

Firm Name: ██████████ Firm
 Phone: phone
 Address: 1
 City, Texas 23323

Close

Figure 5.48 – Example of a Service Contact Details Window

Viewing the Action History from the Review Queue Page

You can view the action history for a specified envelope from the *Review Queue* page.

To view the action history:

1. On the *Review Queue* page, hover over the envelope row.

The Action Menu icon () is displayed.

2. Click , and then select **Action History** from the action menu.

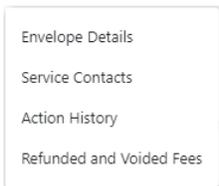


Figure 5.49 – Example of an Action Menu

The *Envelope Action History* window for the specified envelope is displayed.

Envelope Action History				
Envelope #235102				
User	Action	Filing Code	Date/Time	Queue
Automation Tylertest	Submitted		06/07/2024 9:52 PM CDT	Automation Queue
Automation Tylertest	Selected		06/07/2024 9:52 PM CDT	Automation Queue
Automation Tylertest	Selected		06/07/2024 9:52 PM CDT	Automation Queue
Automation Tylertest	Unlocked		06/07/2024 9:52 PM CDT	
Automation Tylertest	EndReview		06/07/2024 9:52 PM CDT	
[REDACTED]	Selected		06/10/2024 2:32 PM CDT	[REDACTED] Queue
[REDACTED]	Selected		06/10/2024 2:32 PM CDT	[REDACTED] Queue
[REDACTED]	Selected		06/10/2024 2:34 PM CDT	[REDACTED] Queue
[REDACTED]	Selected		06/10/2024 2:34 PM CDT	[REDACTED] Queue
[REDACTED]	SaveAnnotation-323951		06/10/2024 2:34 PM CDT	
[REDACTED]	Unlocked		06/10/2024 2:34 PM CDT	
[REDACTED]	EndReview		06/10/2024 2:34 PM CDT	

[No Audit Log](#) [Print Preview](#) [Close](#)

Figure 5.50 – Example of an Envelope Action History Window

Note: The Audit Log button is disabled and reads “No Audit Log” in the *Envelope Action History* window until information has been changed in the envelope during review.

Audit Log

The audit log allows Court Administrators to view the changes that clerks have made to filings. The Court Administrators can view what was added and deleted in addition to specific information about what was changed.

Envelope Audit Log
Envelope #231900

Case 05/08/2024 3:24 PM CDT
Updated By: [redacted]@tylertech.com
▶ added: Object {"caseNumber":"20240508-001","otherCaseNumber":"20240508 blah"}
▶ location: Object {"name":{"Before":"OFS QA 2017","After":"OFS QA 2017 - Court at Law 2"}}
▶ lowerCourt: Object {"added":{"description":"AC Test - Lower Court"}}
▶ judicialOfficerCode: Object {"added":{"description":"Robert R Barton"}}

Envelope 05/08/2024 3:25 PM CDT
Updated By: [redacted]@tylertech.com
▶ deleted: Object {"manuallySetDocketDate":null,"isIndividualFirm":null,"isFakelInitial":null,"hasParentOrder":null,"isInitial":null}
▶ dateToDocket: Object {"Before":"2024-05-06T19:33:00","After":"2024-05-03T09:33:00"}

Party John Smith 05/08/2024 3:25 PM CDT
Updated By: [redacted]@tylertech.com
▶ added: Object {"nameMiddle":"George"}

Filing Abstract Of Judgment, Test Filing 05/08/2024 3:26 PM CDT
Updated By: [redacted]@tylertech.com
▶ comments: Object {"Before":"Test comments","After":"Test comments added during review"}

Fee 05/08/2024 3:26 PM CDT
Updated By: [redacted]@tylertech.com
▶ partyName: Object {"Before":"Jane Doe Sr","After":"John George Smith Sr - Plaintiff"}

Expand All ⓘ Print Preview Close

Figure 5.51 – Example of an Envelope Audit Log Window

The following information is displayed in the audit log:

- The clerk who changed data
- When the clerk changed the data
- The original data
- The new data

Changes to the following elements are included in the audit log:

- **Case** tab
- **Envelope** tab
- **Parties** tab
- **Filings** tab
- **Fees** tab

The audit log is accessed from the action history, which is accessed from the following pages in the application:

- *Review Queue* page
- *Envelope Lookup* page
- *Review History* page

Each audit log entry first shows the section, title, and other information; then, the audit log entry shows user name and date, and the time of the changes.

The changes that are logged include adding, deleting, and editing items. The labels “Before” and “After” indicate the date before the changes were made and the date after the changes were made by a specific user.

You can search the audit log with the browser **Find** command (CTRL + F), and then print the results as needed.

Viewing the Audit Log

You can view the audit log for a specified envelope. The audit log is accessed from the action history, which is accessed from the following pages:

- *Review Queue* page
- *Envelope Lookup* page
- *Review History* page

Envelope Audit Log
Envelope #231900

Case Updated By: [redacted]@tylertech.com ▶ added: Object {"caseNumber":"20240508-001","otherCaseNumber":"20240508 blah"} ▶ location: Object {"name":{"Before":"OFS QA 2017","After":"OFS QA 2017 - Court at Law 2"}} ▶ lowerCourt: Object {"added":{"description":"AC Test - Lower Court"}} ▶ judicialOfficerCode: Object {"added":{"description":"Robert R Barton"}}	05/08/2024 3:24 PM CDT
Envelope Updated By: [redacted]@tylertech.com ▶ deleted: Object {"manuallySetDocketDate":null,"isIndividualFirm":null,"isFakelInitial":null,"hasParentOrder":null,"isInitial":null} ▶ dateToDocket: Object {"Before":"2024-05-06T19:33:00","After":"2024-05-03T09:33:00"}	05/08/2024 3:25 PM CDT
Party John Smith Updated By: [redacted]@tylertech.com ▶ added: Object {"nameMiddle":"George"}	05/08/2024 3:25 PM CDT
Filing Abstract Of Judgment, Test Filing Updated By: [redacted]@tylertech.com ▶ comments: Object {"Before":"Test comments","After":"Test comments added during review"}	05/08/2024 3:26 PM CDT
Fee Updated By: [redacted]@tylertech.com ▶ partyName: Object {"Before":"Jane Doe Sr","After":"John George Smith Sr - Plaintiff"}	05/08/2024 3:26 PM CDT

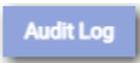
Expand All ⓘ Print Preview Close

Figure 5.52 – Example of an Envelope Audit Log Window

To view the audit log for a specified envelope:

1. Navigate to a page in the eFile & Serve Review Queue where the envelopes are displayed.
2. Locate the envelope for which you want to view the audit log.
3. From the action menu, click **Action History**.

The *Envelope Action History* window for the selected envelope is displayed.

4. Click  .

The *Envelope Audit Log* window for the selected envelope is displayed.

5. To view the details of the audit log, click  .

The details for each entry are displayed.

6. To view the details for just one section, click the arrow next to the specified section.

The details for the specified section are displayed.

7. If you have expanded your view of the *Envelope Audit Log* window and no longer want to see the details, click  .

6 Case and Filing Information

Topics covered in this chapter

- ◆ Summary Information
- ◆ Case Information
- ◆ Envelope Information
- ◆ Party Information
- ◆ Filing Information
- ◆ Service Contact Information
- ◆ Fees and Payment Information
- ◆ Charge Information

When you select an envelope to review, the envelope summary is displayed. To access the rest of the case and filing information, click one of the tabs in the left pane to view the details for that tab.

Summary Information

The **All** tab includes all of the summary information for the envelope under review. The summary information is displayed as soon as you select a specified envelope to review.

Note: Information for some tabs is under development by Tyler and will be added to the All tab in a later version of the eFile & Serve Review Queue.

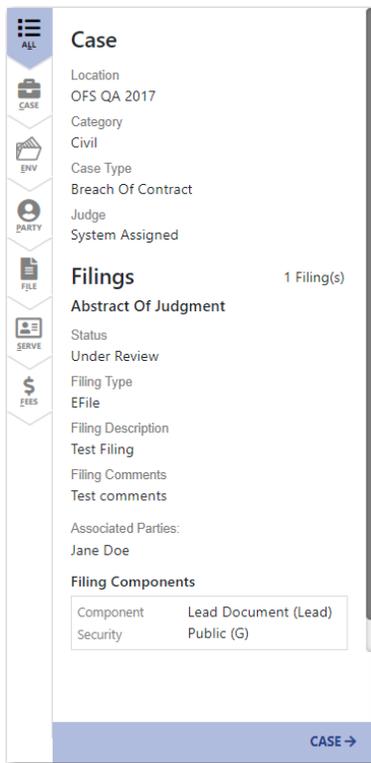


Figure 6.1 – All Tab

When development is complete, the following information will be available on the **All** tab in the same order as the tabs:

- Case information
- Envelope information
- Party information
- Filing details
- Service contact information
- Fee information
- Charge information

Note: Charge information is displayed only for criminal cases. You must have “Criminal Filing” rights to view criminal cases.

Case Information

Use the **Case** tab to access the Case Information pane.

The Case Information pane displays information related to the envelope. The fields that are displayed are pre-populated with information that was submitted by the filer.

Note: The screen shots contained in this section represent a case initiation. If the envelope you are reviewing is a subsequent filing, the case fields are already populated and cannot be edited.

Note: Fields marked with a red asterisk are required fields and may vary, depending on your court's processes.

The screenshot shows a mobile interface for 'CASE INFORMATION'. At the top is a header 'CASE INFORMATION'. Below it is a section titled 'Case Detail' with several fields: 'Case Number' (empty), 'Description' (empty), 'Location *' (dropdown menu showing 'OFS QA 2017'), 'Category *' (dropdown menu showing 'Civil'), and 'Case Type *' (dropdown menu showing 'Breach Of Contract (\$5.00)'). Below these are 'Status', 'Filed Date', and 'Lower Court/Agency Case #' (empty). A section titled 'Damages Sought' shows 'Under \$1000'. Below that is a section titled 'Procedure / Remedies' with a dropdown menu showing 'Appeal'. At the bottom is a 'Judge' dropdown menu showing 'System Assigned'. At the very bottom are two navigation buttons: '← ALL' and 'ENVELOPE →'.

Figure 6.2 – Example of a Case Information Pane

If you want to assign a case number to the envelope, type the case number in the **Case Number** field.

Note: If your configuration requires a case number, then you must type a case number in the Case Number field.

Click the **Location** drop-down list to change the location for the case.

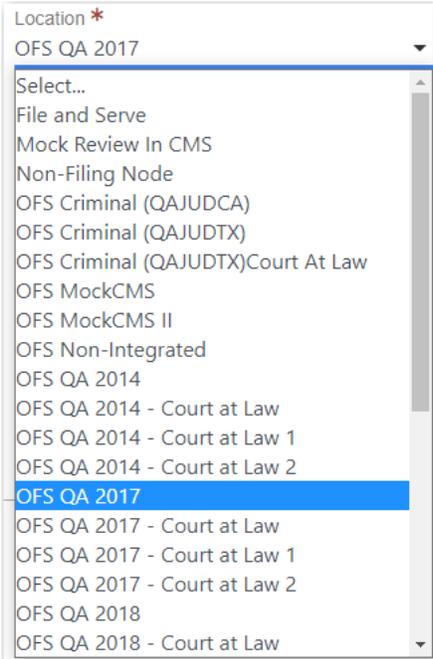


Figure 6.3 – Example of a Location Drop-Down List

Click the **Category** drop-down list to change the category for the case.

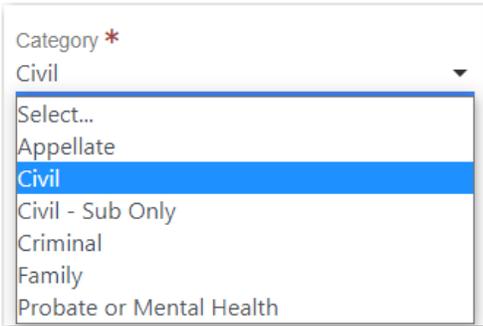


Figure 6.4 – Example of a Category Drop-Down List

Click the **Case Type** drop-down list to change the case type.

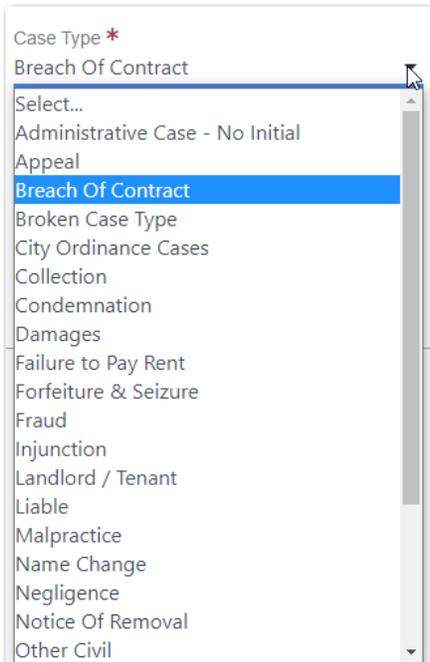


Figure 6.5 – Example of a Case Type Drop-Down List

Based on the configuration inside your case management system (CMS) and the eFile & Serve Review Queue, a judge may be automatically assigned to the case. However, if necessary, you may be able to change the judge assignment. If the **Judge** drop-down list is available, select the specific judge from the list.

Note: The judge assignment section is configured by Tyler and may not be available in your application. In addition, some courts do not permit the selection of a specific judge.

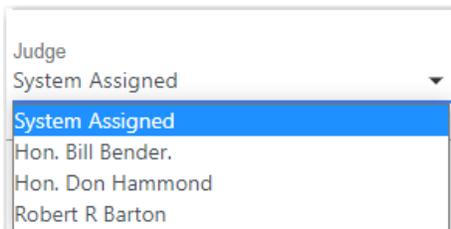


Figure 6.6 – Judge Drop-Down List



Click **← ALL** or the **All** tab to view summary information for the case. Click



or the **Env** tab to navigate to the Envelope Information pane.

Note: At any point, click any tab to navigate to that section of the envelope.

Case Cross References

You can view case cross reference information in the Case Information pane.

Note: The case cross reference types are configured by Tyler and may not be available in your application.

CASE INFORMATION

Case Type *
City Ordinance Cases (\$10.00) × ▾

Status

Filed Date

Lower Court/Agency Case #

Damages Sought
Under \$1000

Procedure / Remedies

Appeal

Judge
System Assigned ▾

Send To Filer Comments
aaa bbb

Case Cross Reference Type	Id	
Case Cross Reference Number *	12345	⋮
Warrant Number (CM) *	123454	⋮

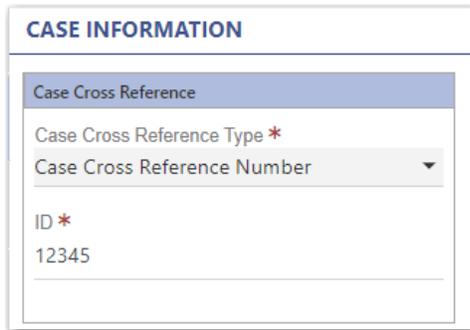
+ Add New

← ALL ENVELOPE →

Figure 6.7 – Case Cross Reference Type Pane Displayed in the Case Information Pane

To view specific case cross reference information, click the cross reference number row. The case cross reference information is displayed.

Note: Case cross reference numbers with an asterisk are required in the configuration and cannot be deleted.



The screenshot shows a 'CASE INFORMATION' pane with a 'Case Cross Reference' section. This section contains three fields: 'Case Cross Reference Type *' (a dropdown menu), 'Case Cross Reference Number' (a dropdown menu), and 'ID *' (a text input field containing the value '12345').

Figure 6.8 – Case Cross Reference Information in the Case Information Pane

Adding a New Case Cross Reference

While you are reviewing an envelope, you can add a new case cross reference to the envelope.

Note: The case cross reference types are configured by Tyler and may not be available in your application.

To add a new case cross reference to an envelope:

1. Locate the envelope that you want to review, and then click the **Case** tab.

The Case Information pane is displayed.

The screenshot shows a 'CASE INFORMATION' pane with various fields. The 'Case Cross Reference' section is highlighted with a blue header. It contains a table with two rows of data and an '+ Add New' button below it.

Case Cross Reference Type	Id	
Case Cross Reference Number *	12345	⋮
Warrant Number (CM) *	123454	⋮

+ Add New

Figure 6.9 – Case Cross Reference Type Pane Displayed in the Case Information Pane

2. In the Case Cross Reference Type pane, click  .
The *Case Cross Reference* window is displayed.

CASE INFORMATION

Case Cross Reference

Case Cross Reference Type *
Select...
Case Cross Reference Type is Required.

ID *
Reference Id Required

DELETE

Figure 6.10 – Case Cross Reference Window

- From the drop-down list, select the type of case cross reference that you want to add.

Case Cross Reference

Case Cross Reference Type *
Select...
Select...
Case Cross Reference Number
Uniform Case Number
Warrant Number (CM)

Figure 6.11 – Example of a Case Cross Reference Type Drop-Down List

- Complete the required fields, and then click **CONTINUE**.

The case cross reference type that you added is displayed in the Case Cross Reference Type pane in the Case Information pane.

Note: If you want to delete a case cross reference number, click the row to view the details for

the specified case cross reference number, and then click **DELETE**. Case cross reference numbers with an asterisk are required in the configuration and cannot be deleted.

Viewing the Will Filed Date

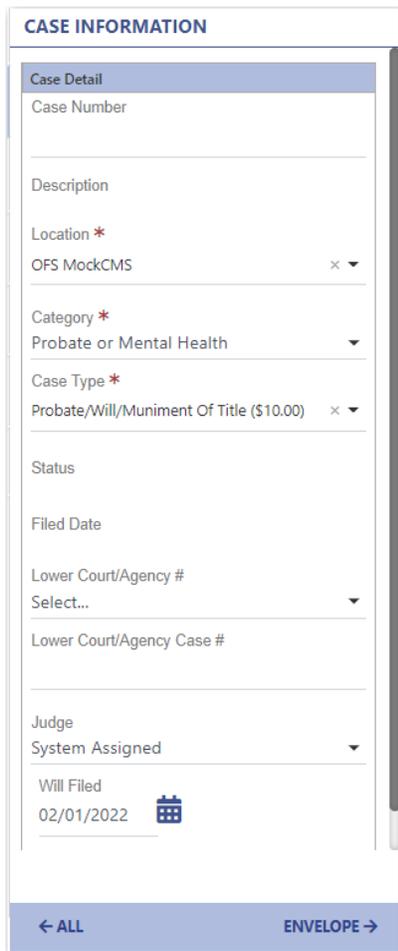
When you are reviewing an envelope, you can view the Will Filed date in the Case Information pane.

Note: This feature is configured by Tyler and may not be available in your application.

To view the Will Filed date:

1. Locate the envelope that you want to review, and then click the **Case** tab.

The Case Information pane is displayed.



The screenshot shows a 'CASE INFORMATION' pane with the following fields:

- Case Detail** (Section Header)
- Case Number
- Description
- Location * (Dropdown menu: OFS MockCMS)
- Category * (Dropdown menu: Probate or Mental Health)
- Case Type * (Dropdown menu: Probate/Will/Muniment Of Title (\$10.00))
- Status
- Filed Date
- Lower Court/Agency # (Dropdown menu: Select...)
- Lower Court/Agency Case #
- Judge (Dropdown menu: System Assigned)
- Will Filed (Date field: 02/01/2022 with a calendar icon)

At the bottom of the pane are navigation buttons: ← ALL and ENVELOPE →

Figure 6.12 – Will Filed Date in the Case Information Pane

2. View the Will Filed date in the **Will Filed** field. If you need to change the date, click  and then select a different date.

The new date is automatically saved.

Viewing Case Address Information

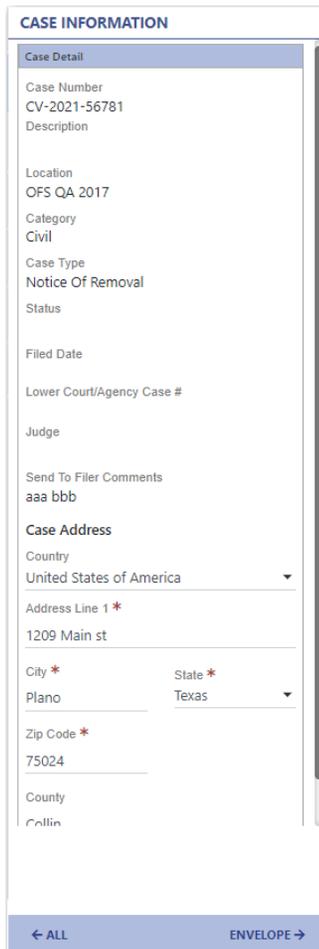
When you are reviewing an envelope, you can view the Case Address information in the Case Information pane.

Note: This feature is configured by Tyler and may not be available in your application.

To view the Case Address information:

1. Locate the envelope that you want to review, and then click the **Case** tab.

The Case Information pane is displayed.



The screenshot shows a vertical pane titled "CASE INFORMATION". At the top is a "Case Detail" section with fields for Case Number (CV-2021-56781), Description, Location (OFS QA 2017), Category (Civil), Case Type (Notice Of Removal), Status, Filed Date, Lower Court/Agency Case #, and Judge. Below this is a "Send To Filer Comments" field containing "aaa bbb". The "Case Address" section includes a Country dropdown (United States of America), an Address Line 1 field (1209 Main st), a City dropdown (Plano), a State dropdown (Texas), a Zip Code field (75024), and a County field (Collin). At the bottom of the pane are navigation buttons: "← ALL" and "ENVELOPE →".

Figure 6.13 – Case Address Information in the Case Information Pane

2. View the Case Address information, and make any changes, if applicable.

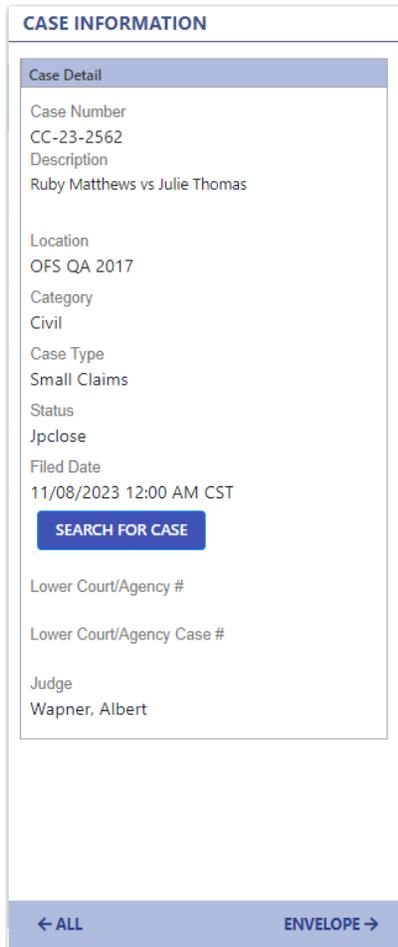
Your changes are automatically saved.

Search for Case

The Search for Case feature allows reviewers to find a case to associate a subsequent envelope to. The ability to merge an envelope with a case is particularly useful after a blackout or for non-integrated locations where the filer is required to enter all case information with a subsequent filing.

Note: The Search for Case feature is configured by Tyler and may not be available in your application.

The **Search for Case** button is enabled in the Case Information pane for subsequent filings in most instances.



The screenshot displays a 'CASE INFORMATION' pane with a 'Case Detail' section. The details include: Case Number (CC-23-2562), Description (Ruby Matthews vs Julie Thomas), Location (OFS QA 2017), Category (Civil), Case Type (Small Claims), Status (Jpclose), and Filed Date (11/08/2023 12:00 AM CST). A blue 'SEARCH FOR CASE' button is visible below the date. At the bottom of the pane, there are navigation links: '← ALL' and 'ENVELOPE →'.

Figure 6.14 – Example of the Search for Case Button in a Case Information Pane

If an envelope is ineligible to be merged to a different case, the **Search for Case** button is disabled. A tooltip explains the reason.

The button is unavailable in the following instances:

- Case initiation envelopes
- Envelopes that have a filing with an error or an action taken
- Envelopes that contain filings with multiple parties responsible for fees associated to additional services

The Search for Case feature merges the incoming envelope's parties to an existing case. Once the action is complete, it cannot be undone.

If the envelope's Party Responsible for Fees (PRFF) is removed in the merge with the case, a dialog box is displayed, prompting the user to select a new PRFF.

Searching for a Case

Note: The Search for Case feature is configured by Tyler and may not be available in your application.

To search for a case:

1. From the *Review Queue* page, type the number of the case you want to search for in the **Case #** field.

The envelopes that match the case number are displayed.

2. Click the envelope that you want to view.

The envelope is displayed.

3. Click the **Case** tab.

The Case Information pane is displayed.

CASE INFORMATION
Case Detail
Case Number
CC-23-2562
Description
Ruby Matthews vs Julie Thomas

Location
OFS QA 2017
Category
Civil
Case Type
Small Claims
Status
Jpclose
Filed Date
11/08/2023 12:00 AM CST
SEARCH FOR CASE

Lower Court/Agency #

Lower Court/Agency Case #

Judge
Wapner, Albert

← ALL ENVELOPE →

Figure 6.15 – Example of a Case Information Pane

4. Click **SEARCH FOR CASE**.

The *Search for Case* window is displayed with the current case number and location.

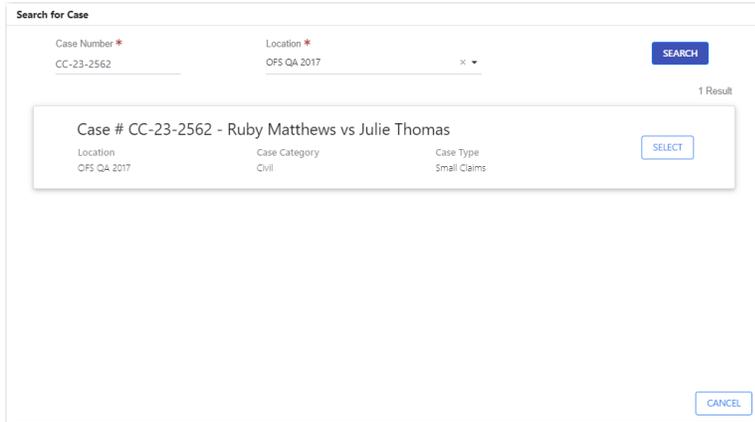


Figure 6.16 – Example of a Search for Case Window

5. If you want to change the case number, type a different number in the **Case Number** field. Likewise, if you want to change the location, select another location from the **Location** drop-down list. Then, click



If any cases match your search, they are displayed in the *Search for Case* window. In some instances, multiple cases may be displayed. If no cases match your search, a message is displayed indicating there was no match for the criteria that you selected.

6. If the case that you want to merge is displayed, click



A confirmation message is displayed.

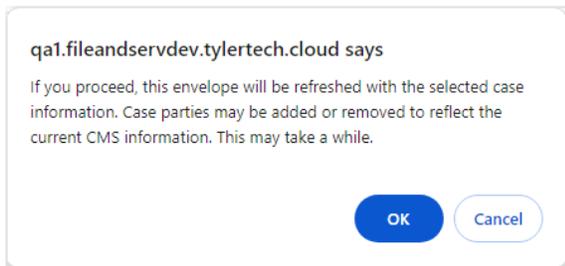


Figure 6.17 – Example of a Confirmation Message

7. Click **OK** to continue.

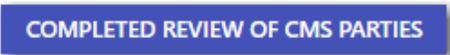
The CMS Parties panes are displayed.

Envelope 231443 • New Case CC-23-2562 • Previous Case CC-23-2562

Parties Before CMS Update	CMS Parties												
<p>These are parties that were already existing in the eFiling system when the envelope was submitted. They were replaced with the CMS parties when you selected the case from Case Search.</p> <p style="text-align: right;">+ Add New Party</p> <p>Search Existing Parties and Attorneys...</p> <table border="1"> <thead> <tr> <th colspan="2">Existing Parties (2 of 2)</th> </tr> </thead> <tbody> <tr> <td>Plaintiff Ruby Matthews</td> <td>Lead Attorney</td> </tr> <tr> <td>Defendant Julie Thomas</td> <td>Lead Attorney</td> </tr> </tbody> </table>	Existing Parties (2 of 2)		Plaintiff Ruby Matthews	Lead Attorney	Defendant Julie Thomas	Lead Attorney	<p>This is the current case party information from your CMS. Compare this information against any parties added by the filer on the left panel Parties Added.</p> <p>Search Existing Parties and Attorneys...</p> <table border="1"> <thead> <tr> <th colspan="2">Existing Parties (2 of 2)</th> </tr> </thead> <tbody> <tr> <td>Plaintiff Ruby Matthews</td> <td>Lead Attorney</td> </tr> <tr> <td>Defendant Julie Thomas</td> <td>Lead Attorney</td> </tr> </tbody> </table>	Existing Parties (2 of 2)		Plaintiff Ruby Matthews	Lead Attorney	Defendant Julie Thomas	Lead Attorney
Existing Parties (2 of 2)													
Plaintiff Ruby Matthews	Lead Attorney												
Defendant Julie Thomas	Lead Attorney												
Existing Parties (2 of 2)													
Plaintiff Ruby Matthews	Lead Attorney												
Defendant Julie Thomas	Lead Attorney												
<p>COMPLETED REVIEW OF CMS PARTIES</p>													

Figure 6.18 – Example of CMS Parties Panes

- Review the information in the panes. When you are done, click



The CMS Parties panes close, and the Case Information pane is displayed again.

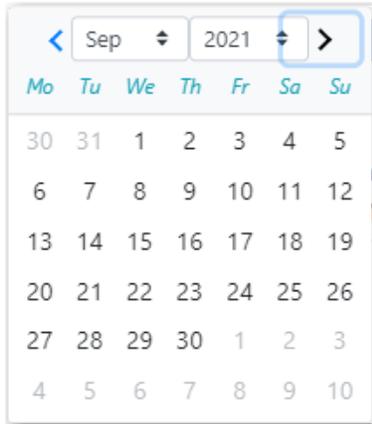


Figure 6.20 – Docket Date Calendar



- Click  to change the docket time.

The **Docket Time** drop-down list is displayed.

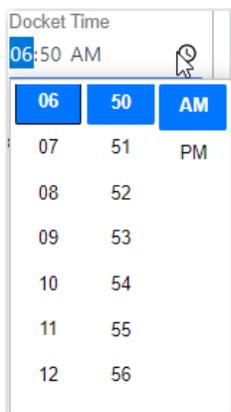
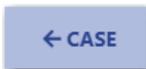
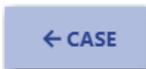


Figure 6.21 – Docket Time Drop-Down List

- Change the filer type from the **Filer Type** drop-down list.



Click  or the **Case** tab to return to the Case Information pane. Click



 or the **Party** tab to navigate to the Party Information pane.

Note: At any point, click any tab to navigate to that section of the envelope.

Changing the Docket Date When the Reason Is Required

When you are reviewing an envelope, you may be required to enter a reason for changing the docket date.

Note: This feature is configured by Tyler and may not be available in your application.

To change the docket date:

1. Locate the envelope that you want to review, and then click the **Env** tab.

The Envelope Information pane is displayed.

ENVELOPE #192846

Envelope Information

Submit Date
06/13/2020 5:17 AM CDT

Docket Date *  Docket Time *
06/13/2020 05:17 AM 

Filing Source
EFSP-Springboard

Filing Attorney
[Redacted]

Filed By
[Redacted]

Firm Name
Test-Law Office of [Redacted]

Firm Address
5001 Tennyson Pkwy
Plano, Texas 75024

Firm Phone
972-713-3770 [Redacted]

Filer Email
[Redacted]@tylertech.com

Filer Type
Default 

← CASE PARTY →

Figure 6.22 – Example of an Envelope Information Pane

2. Click  .

The *Edit Docket Date* dialog box is displayed.

Figure 6.23 – Edit Docket Date Dialog Box

3. Select a new date from the calendar.
4. From the **Change Date Reason** drop-down list, select a reason for the date change.

Figure 6.24 – Example of a Change Date Reason Drop-Down List

5. If applicable, type comments in the **Change Date Comments** field.

6. Click  .

The changes that you made are displayed in the *Edit Docket Date* dialog box.

Figure 6.25 – Example of an Edit Docket Date Dialog Box with a Changed Date

Viewing the Docket Date Change Log in Envelope Details

You can view the Docket Date Change Log in the envelope details.

You can access the envelope details from several pages in the eFile & Serve Review Queue:

- *Review Queue* page
- *Review History* page
- *Envelope Lookup* page

To view the Docket Date Change Log in the envelope details:

1. From one of the pages in the application listed above, locate the envelope for which you want to view the Docket Date Change Log. Then, click **Envelope Details**.

The *Envelope Detail* page is displayed.

Docket Date Change	Reason	Comments	Original Date/Time	New Date/Time	Changed By
03/04/2022	Adjust for Holiday		01/19/2022 4:41 PM CST	01/19/2022 1:41 PM CST	

Figure 6.26 – Example of an Envelope Detail Page with the Docket Date Change Log Displayed

The Docket Date Change Log is displayed with the date of the change, the reason for the change, the original date and time, the new date and time, and the reviewer who made the change.

Party Information

Use the **Party** tab to access the Party Information pane.

The Party Information pane displays information related to the parties in the case filing. The fields that are displayed are pre-populated with information that was submitted by the filer.

Note: If you are reviewing a subsequent filing, the Party Information pane includes another list of existing parties. For a subsequent filing, the only action you can perform is to add attorneys.

The screenshot shows a 'PARTY INFORMATION' pane. At the top right is a '+ Add New Party' link. Below it is a search bar labeled 'Search New Parties and Attorneys...'. A section titled 'Parties Added With This Envelope (2)' contains a table with two rows:

Plaintiff	Lead Attorney
Jane Doe Jr	[Redacted]
Defendant	Lead Attorney
John Smith Jr	

At the bottom of the pane are two navigation tabs: '← ENVELOPE' and 'FILING →'.

Figure 6.27 – Example of a Party Information Pane

← ENVELOPE

Click **← ENVELOPE** or the **Env** tab to return to the Envelope Information pane. Or, click **FILING →** or the **File** tab to navigate to the Filing Information pane.

FILING →

Note: At any point, click any tab to navigate to that section of the envelope.

Editing Party Information

You can edit the party information that was entered for the case filing.

To edit the party information:

1. In the Party Information pane, click the row with the party's name.

The Party Detail pane for the specified party is displayed.

PARTY DETAIL

Edit Party - John Smith

Party Type
Defendant
Lead Attorney

[VERIFY](#) [VIEW ATTORNEY](#)

NAME AND CONTACT Business or Agency

First Name * Middle Name
John

Last Name *
Smith

Suffix
Sr

Date of Birth Person ID
12/31/1970

Email
john.doe@someemail.com

CONTACT INFORMATION

Phone Number
9727133770

Country
United States of America

Address Line 1

CLOSE **SAVE** **NEXT**

Figure 6.28 – Example of a Party Detail Pane

2. Review the information in the pane.
3. If applicable, edit any information that needs to be changed.

Note: Use the drop-down lists, where applicable, to edit the information in the specified field.



Click to change or select the party's date of birth in the Date of Birth field.



4. Click to save your changes.
5. Do one of the following:

- Click  to view the information for the next party.
- Click  if the current party data has been edited.
- Click  to close the Edit Party Information pane

Verifying Party Information

You can verify the party information that was entered in the case filing.

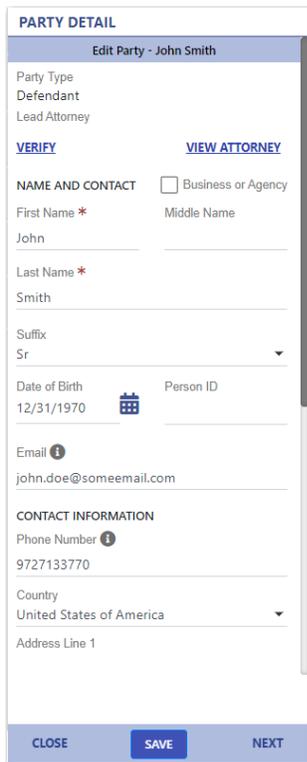
Note: The Verify Party feature is configured by Tyler and may not be available in your application.

Note: You must have “Reviewer” rights to perform this procedure.

To verify the party information:

1. In the Party Information pane, click the party for which you want to view the information.

The Party Detail pane for the specified party is displayed.



PARTY DETAIL
Edit Party - John Smith

Party Type
Defendant
Lead Attorney

[VERIFY](#) [VIEW ATTORNEY](#)

NAME AND CONTACT Business or Agency

First Name * Middle Name
John

Last Name *
Smith

Suffix
Sr

Date of Birth Person ID
12/31/1970

Email ⓘ
john.doe@someemail.com

CONTACT INFORMATION

Phone Number ⓘ
9727133770

Country
United States of America

Address Line 1

[CLOSE](#) [SAVE](#) [NEXT](#)

Figure 6.29 – Example of a Party Detail Pane

2. Click .

The Verify Party pane is displayed.

VERIFY PARTY

Use Person ID

To use the Person ID, a valid Person ID must be searched. If you select the 'Use Person ID' section, the Person ID will be used.

[Hide Help](#)
Party Lookup by Person ID

Person ID required

Use Filer Party

If you select the 'Use Filer Party' section, the Person ID entered by the filer will NOT be used. The party information fields will be editable.

[Hide Help](#)
First and Middle Name
John
Last Name
Smith
Email
john.doe@someemail.com
Phone Number
9727133770

Figure 6.30 – Example of a Verify Party Pane

3. Select the method that you want to use to verify the party:

- For **Use Person ID**, type the person's ID in the field, and then click .
- For **Use Filer Party**, select the check box. Then, complete the required fields.

4. Click .

Adding a New Party

You can add a new party to a case you are reviewing.

To add a new party:

1. In the Party Information pane, click .

The Party Detail pane is displayed.

The screenshot shows a 'PARTY DETAIL' form with the following sections and fields:

- Party Type** (required, marked with a red asterisk): A dropdown menu with 'Select...' and an error message 'Party Type is Required.' below it.
- Lead Attorney**: A dropdown menu with 'Select...'.
- NAME AND CONTACT**: A section header with a checkbox for 'Business or Agency'.
- First Name** (required, marked with a red asterisk): A text input field with an error message 'First Name is Required.' below it.
- Middle Name**: A text input field.
- Last Name** (required, marked with a red asterisk): A text input field with an error message 'Last Name is Required.' below it.
- Suffix**: A dropdown menu with 'Select...'.
- Date of Birth** (MM/DD/YYYY): A date picker field.
- Person ID**: A text input field.
- Email**: A text input field with a ghost text 'ghost text for this' and an information icon.
- CONTACT INFORMATION**: A section header.
- Phone Number**: A text input field with an information icon.
- Country**: A dropdown menu with 'United States of America' selected.
- Address Line 1**: A text input field.

At the bottom of the form are three buttons: 'CLOSE', 'SAVE', and 'NEXT'.

Figure 6.31 – Party Detail Pane

2. Complete the required fields (which are marked with a red asterisk), and then click



PARTY INFORMATION

+ Add New Party

Search New Parties and Attorneys...

Parties Added With This Envelope (3)

Plaintiff	Lead Attorney
Jane Doe Jr	
Defendant	Lead Attorney
John Smith Jr	
Agent	Lead Attorney
Harriet Doe	

← ENVELOPE FILING →

Figure 6.32 – Example of a Party Information Pane with the New Party Added

Deleting a Party

You can delete a non-required party that was added to a case.

Note: You cannot delete a required party from a case. Also, you cannot delete an existing party on a subsequent filing.

To delete a non-required party from a case:

1. Click the **Party** tab.

The Party Information pane is displayed.

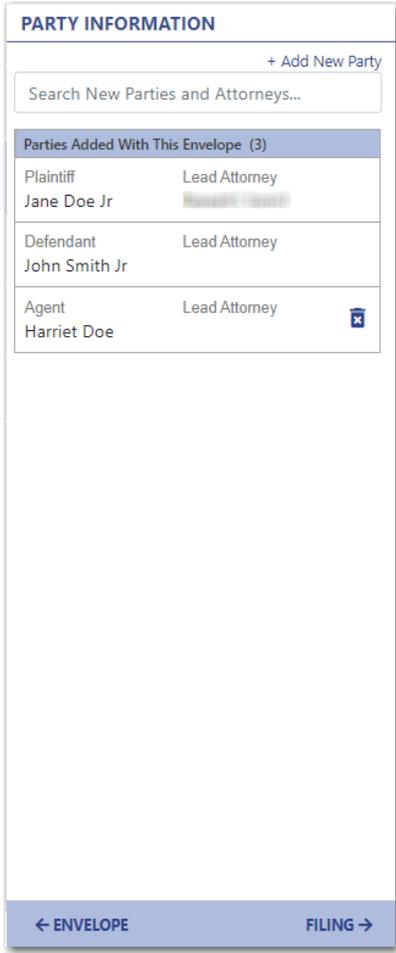


Figure 6.33 – Example of a Party Information Pane

2. Locate the party that you want to delete from the case. Then, do one of the following:

- In the row for the party that you want to delete, click .
- Click the row of the party that you want to delete. The **Edit Party** section for the specified party is displayed. Then, click .

The screenshot shows a web form titled 'PARTY DETAIL' with a sub-header 'Edit Party - George Smith'. The form contains several sections:

- Party Type:** A dropdown menu with 'Administrator' selected.
- Lead Attorney:** A section with three links: 'VERIFY', 'DELETE', and 'VIEW ATTORNEY'.
- NAME AND CONTACT:** A section with a checkbox for 'Business or Agency'. It includes input fields for 'First Name' (containing 'George'), 'Middle Name', and 'Last Name' (containing 'Smith'). There is also a 'Suffix' dropdown menu.
- Date of Birth:** A date input field with a calendar icon and a 'Person ID' field.
- Email:** An input field with a placeholder 'ghost text for this'.
- CONTACT INFORMATION:** A section with a 'Phone Number' input field and a 'Country' dropdown menu set to 'United States of America'.

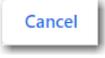
At the bottom of the form are two buttons: 'CLOSE' and 'SAVE'.

Figure 6.34 – Example of an Edit Party Section of a Party Detail Pane

Note: Only non-required parties can be deleted.

A message is displayed:

Are you sure you want to delete: Harriet Doe - Agent?

3. Click  to continue, or click  to cancel the action.

If you continued with your action, the party is deleted from the case.

Viewing Date of Death in the Party Detail Pane

When you are reviewing an envelope, you can view the Date of Death information in the Party Detail pane.

Note: This feature is configured by Tyler and may not be available in your application.

To view the Date of Death information:

1. Locate the envelope that you want to review, and then click the **Party** tab.

The Party Information pane is displayed.

2. Locate the party that you want to view the party detail information, and then click the row for that party.

The Party Detail pane for the specified party is displayed

The screenshot shows a web form titled "PARTY DETAIL" for "Edit Party - Hugh James". The form includes the following fields and sections:

- Party Type:** A dropdown menu with "Petitioner" selected. Below it, there are links for "VERIFY" and "VIEW ATTORNEY".
- Lead Attorney:** A text input field.
- Representation:** A checkbox labeled "This is a represented party".
- NAME AND CONTACT:** A section header with a checkbox for "Business or Agency".
- First Name:** A text input field containing "Hugh".
- Middle Name:** A text input field.
- Last Name:** A text input field containing "James".
- Suffix:** A dropdown menu with "Select..." selected.
- Date of Birth:** A date input field containing "06/12/1947" with a calendar icon.
- Person ID:** A text input field.
- Email:** A text input field containing "ghost text for this" with an information icon.
- Date of Death:** A date input field containing "12/01/2017" with a calendar icon.
- CONTACT INFORMATION:** A section header.
- Phone Number:** A text input field with an information icon.

At the bottom of the form, there are two buttons: "CLOSE" and "SAVE".

Figure 6.35 – Date of Death Information in the Party Detail Pane

3. View the Date of Death information in the **Date of Death** field. If you need to change the date, click



and then select a different date.

4. Click  .

Viewing Attorney Information

You can view the attorney information for each party that was entered in the case filing.

To view the attorney information:



1. In the Party Detail pane for the specified party, click

The Attorneys pane is displayed. If more than one attorney has been entered for the specified party, you can change the lead attorney who was entered. You can also remove an attorney from the case filing.

Note: You cannot change or remove the lead attorney on a subsequent filing.

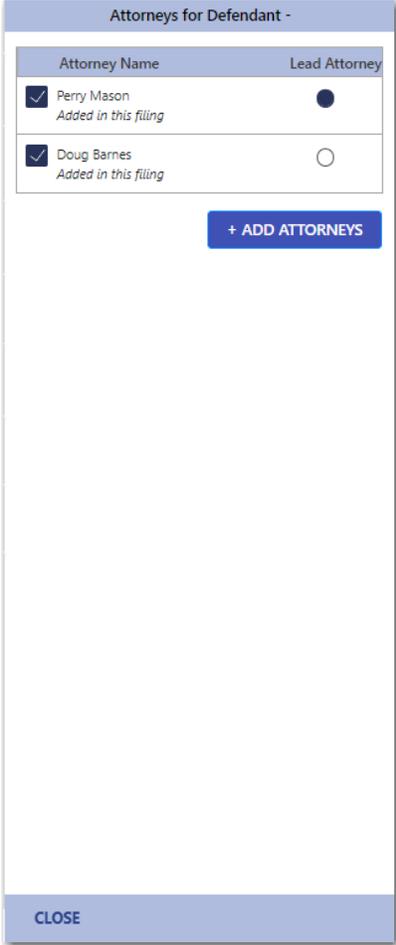


Figure 6.36 – Example of an Attorneys Pane



2. To make changes to the attorneys, click

The attorney list is displayed.

3. If you want to change the lead attorney, select a different attorney from the list. Also, clear the check box for each attorney whom you want to remove.

4. Click  , and then click  .

Adding an Attorney to a Party

You can add an attorney to a party in an envelope. The attorneys who are currently displayed were selected by the filer when the filing was submitted. During a review, you can add only an attorney who is in your firm.

Note: This feature is configured by Tyler and may not be available in your application.

To add an attorney to a party:

1. In the Attorneys pane, click  .

The *Add Attorney* window is displayed.

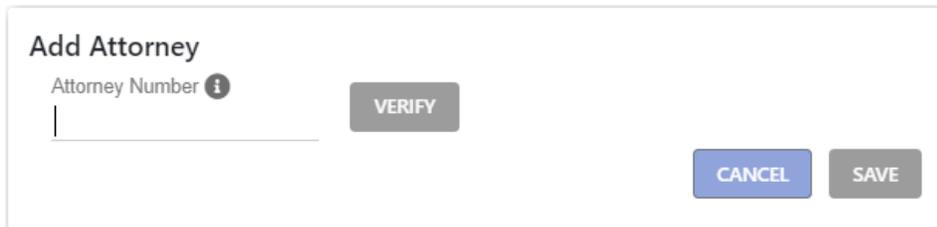


Figure 6.37 – Add Attorney Window

2. Type the attorney number in the **Attorney Number** field, and then click  .

If the attorney number that you typed matches an attorney in your firm, the attorney's name is displayed.

3. Click  .

The attorney is added to the list of attorneys who are available for the specified party.

The screenshot shows a window titled "Attorneys for Defendant -". At the top is a search bar labeled "Search Attorneys...". Below it is a table with two columns: "Attorney Name" and "Number". Each row has a checkbox to the left of the name. The table lists the following attorneys and numbers:

Attorney Name	Number
Pro Se	
Steve [REDACTED]	3
Jeff Moore	3
Perry Mason	85
Doug Barnes	00783603
Jack O'Boyle & Assoc.	15165300
James Bond	123
dgqcbazgyh zjhadqqlnq	12345
cpemuamzlg ogggvczru	12345
Two Twenty	2022

Below the table is a pagination control showing "Prev 1 2 3 4 ... 7 Next" and "Page 1 of 7". A button labeled "ADD FIRM ATTORNEY" is positioned below the pagination. At the bottom of the pane are two buttons: "CANCEL" and "CONTINUE".

Figure 6.38 – Available Attorneys Pane

- Select the check box for the attorneys whom you want to add for the specified party, and then click

CONTINUE

- Click **SAVE** to save the new attorney list and to return to the Edit Party pane.

Adding “Pro Se” for the Attorney Name

When you add “Pro Se” for the attorney name, no other attorneys can be added for the specified party.

To add “Pro Se” for the attorney name:

VIEW ATTORNEY

- In the Party Detail pane for the specified party, click

The Attorneys pane is displayed.

Attorneys for Petitioner -

Search Attorneys...

Attorney Name	Number
<input type="checkbox"/> Pro Se	
<input type="checkbox"/> [Redacted] S [Redacted]	1
<input type="checkbox"/> Perry Mason	10
<input type="checkbox"/> [Redacted] 1 S [Redacted] 1	1234
<input type="checkbox"/> [Redacted] 2 S [Redacted] 2	12345
<input type="checkbox"/> [Redacted] 3 S [Redacted] 3	123456
<input type="checkbox"/> [Redacted] 4 S [Redacted] 4	123
<input type="checkbox"/> jeff moor	3
<input type="checkbox"/> jeff moor	3
<input type="checkbox"/> john smith	10

Prev **1** 2 Next Page 1 of 2

CLOSE

Figure 6.39 – Example of an Attorneys Pane

2. Select **Pro Se** from the list of attorneys.

The screenshot shows a web interface titled "Attorneys for Defendant". At the top is a search bar labeled "Search Attorneys...". Below it is a table with two columns: "Attorney Name" and "Number". The first row in the table has a checked checkbox, the name "Pro Se", and an empty "Number" field. Below the table is a pagination control with "Prev", "1", "2", "3", "4", "...", "7", and "Next", along with "Page 1 of 7". A button labeled "ADD FIRM ATTORNEY" is positioned to the right of the table. At the bottom of the interface are two buttons: "CANCEL" and "CONTINUE".

Figure 6.40 – Example of Pro Se Selected as Attorney

3. Click  , and then click  .

Representative Capacity

You can add representatives on a case to the case file during a review.

Note: The Representative Capacity feature is configured by Tyler and may not be available in your application.

The representatives may or may not be parties to the case. Representatives that are not parties to the case generally have an interest in the case and its outcome.

You can add more than one representative to a case. The representative is referred to as the “represented party” in the eFile & Serve Review Queue.

Adding Represented Parties to a Case

You can add representatives on a case to the case file during review.

Note: The Representative Capacity feature is configured by Tyler and may not be available in your application.

Note: You must have “Reviewer” rights to perform this procedure.

To add represented parties to a case:

1. On the *Review Queue* page, click the envelope that you want to review.

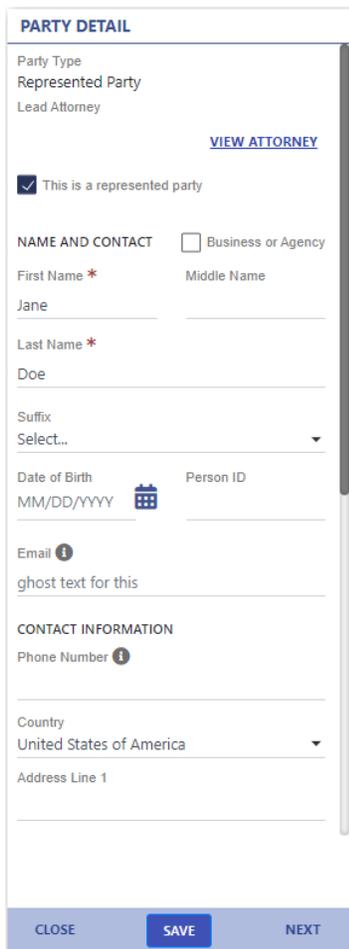
The envelope is displayed, and the **All** tab is highlighted.

2. Click the **Party** tab to view the party information.

The Party Information pane is displayed.

3. Click the row of the party for which you want to view additional information.

The Party Detail pane for the specified party is displayed.



The screenshot shows a 'PARTY DETAIL' form. At the top, it lists 'Party Type' as 'Represented Party' and 'Lead Attorney' with a 'VIEW ATTORNEY' link. A checked checkbox indicates 'This is a represented party'. Below this is the 'NAME AND CONTACT' section, which includes a 'Business or Agency' checkbox and fields for 'First Name *' (Jane), 'Middle Name', and 'Last Name *' (Doe). There is also a 'Suffix' dropdown menu set to 'Select...'. The 'Date of Birth' field is labeled 'MM/DD/YYYY' with a calendar icon, and there is a 'Person ID' field. An 'Email' field contains 'ghost text for this'. The 'CONTACT INFORMATION' section includes a 'Phone Number' field with an information icon, a 'Country' dropdown menu set to 'United States of America', and an 'Address Line 1' field. At the bottom of the form are three buttons: 'CLOSE', 'SAVE', and 'NEXT'.

Figure 6.41 – Example of a Party Detail Pane with a Represented Party

4. Select the **This is a represented party** check box.

The **Representatives** section is displayed.



Figure 6.42 – Representatives Section

5. Click .

Additional fields are displayed in the **Representatives** section.

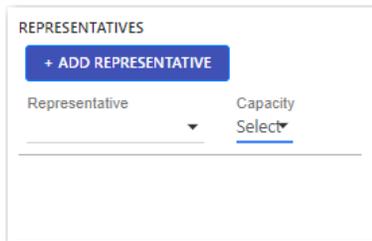


Figure 6.43 – Representatives Section with Additional Fields

6. From the **Representative** drop-down list, select the name of the representative that you want to add.
7. From the **Capacity** drop-down list, select the capacity of the representative that you want to add.
8. Click .

Filing Information

Use the **File** tab to access the Filing Information pane.

The Filing Information pane displays information related to the case filing. The fields that are displayed are pre-populated with information that was submitted by the filer.

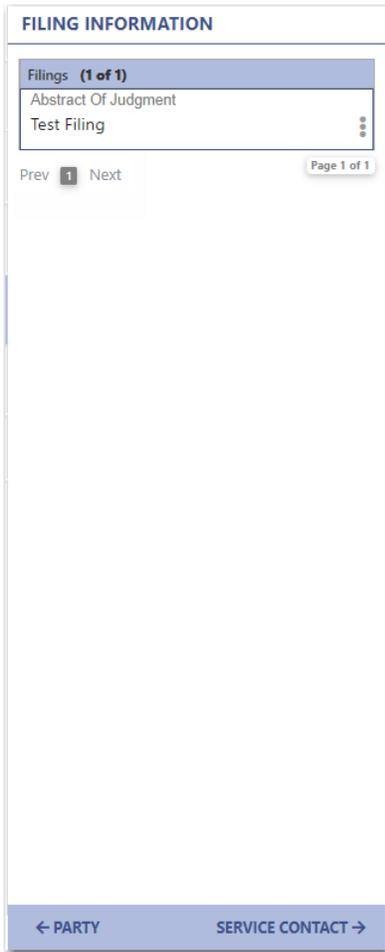


Figure 6.44 – Example of a Filing Information Pane

Click the row to view or change information in the following filing panes:

- Filing Details pane
- Assoc. Parties pane
- Services pane

Click  or the **Party** tab to return to the Party Information pane. Or, click  or the **Serve** tab to navigate to the Service Contact Information pane.

Note: At any point, click any tab to navigate to that section of the envelope.

Filing Details

The **Filing Details** section in the Filing Information pane includes details about the filing, including the documents attached to the filing that you need to review. The file size of the documents is also displayed.

The screenshot shows a web interface titled "FILING INFORMATION" with a sub-header "Filing - Addendum - EFile". Below this are three tabs: "Filing Details", "Assoc. Parties", and "Services". The "Filing Details" tab is active and displays three document entries. Each entry includes a file size, a document description (with an information icon and an asterisk indicating it is required), a security dropdown menu, and a confidentiality dropdown menu. The first document is "AddendumRedactions edited" (212.38 KB) with security set to "Filer: Sealed - Criminal (G)" and "CMS: Sealed - Criminal (G)". The second document is "viewer 1 v viewer 2.pdf" (5,038.61 KB) with security set to "Filer: Sealed - Criminal (G)" and "CMS: Sealed - Criminal (G)". The third document is "Large user guides 6658 KB.pdf" (6,657.04 KB) with security set to "Filer: Sealed - Criminal (G)" and "CMS: Sealed - Criminal (G)". At the bottom of the pane are "CLOSE" and "SAVE" buttons.

Figure 6.45 – Example of the Filing Details Section in the Filing Information Pane

The fields that are marked with an asterisk are required. If any required fields are not populated, an error message is displayed for the reviewer. Any field can be changed by the reviewer.

To change the filing code, select the appropriate filing code from the drop-down list, or begin typing the filing code name.

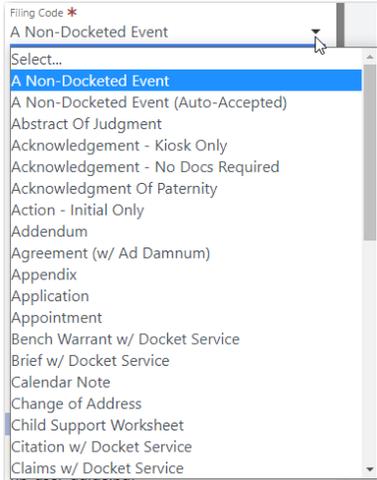


Figure 6.46 – Example of a Filing Code Drop- Down List

To change the name of the lead document, type a new name in the **Lead Document Document Name** field.

To change the security option for the lead document, select the appropriate security option from the drop-down list.

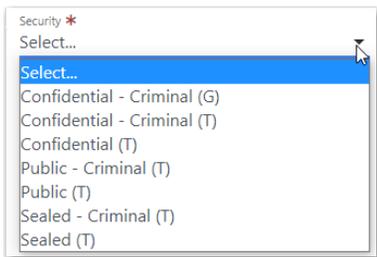


Figure 6.47 – Example of a Security Drop-Down List

If you make changes to the filing details, click **SAVE**. Or, click **CLOSE** to return to the Filing Information pane.

Viewing Motion Type Filing Information

When you are reviewing an envelope, you can view the Motion Type filing information.

Note: This feature is configured by Tyler and may not be available in your application.

To view the Motion Type filing information:

1. Locate the envelope that you want to review, and then click the **File** tab.

The Filing Information pane is displayed.

Note: The envelope might contain multiple filings.
2. Locate the filing that you want to view, and then click the row.

The Filing Details pane for the specified filing is displayed.

Figure 6.48 – Example of Motion Type Information in a Filing Details Pane

3. View the Motion Type information, and then make changes, if applicable.

4. Click

SAVE

Viewing Judge's Comments in Filing Details for Proposed Order Child Envelopes

When you are reviewing a proposed order child envelope, you can view the judge's comments if the judge has added them. Only the comments the judge has added for a ruling of grant, moot, or deny are displayed in the Filing Details pane in the Filing Information pane.

Note: This feature is configured by Tyler and may not be available in your application.

To view the judge's comments for a proposed order child envelope:

1. Locate the proposed order child envelope that you want to review, and then click the **File** tab.

The Filing Information pane is displayed.

Note: The envelope might contain multiple filings.

2. Locate the filing that you want to view, and then click the row.

The Filing Details pane for the specified filing is displayed.

The screenshot displays a web interface for filing details. At the top, there is a header 'FILING INFORMATION' and a sub-header 'Filing - Order - EFileAndServe'. Below this are three tabs: 'Filing Details', 'Assoc. Parties', and 'Services'. The 'Filing Details' tab is active. It contains several sections: 'Filing Code' with a dropdown menu showing 'Order (\$10.00)'; 'Filing Type' set to 'EFileAndServe'; 'Reference Number' (empty); 'Filing Description' (empty text box); 'Filing Comments' (empty text area with an information icon); 'Proposed Order Action' set to 'Granted'; 'Judge Comments' with the text 'This envelope is being granted.'; 'Filing Courtesy Copies' (empty with an information icon); and 'Filing Preliminary Notifications' (empty with an information icon). Below this is a 'Documents' section with a checked 'Lead Document Name' 'RedactThisNew-1.pdf', a 'Document Description' 'RedactThisNew-1.pdf', 'Security' settings for 'Filer: Public' and 'CMS: Public (G)', and 'Is Confidential' set to 'No' with a dropdown menu showing 'Public (G)'.

Figure 6.49 – Example of the Judge’s Comments in a Filing Details Pane

3. View the judge’s comments in the **Judge Comments** section, and then continue with your review.

Associated Parties

The **Assoc. Parties** section in the Filing Information pane includes the parties that are associated with the filing that you want to review. The fields that are displayed are pre-populated with information that was submitted by the filer.

The screenshot shows the 'FILING INFORMATION' pane for 'Filing - Abstract Of Judgment - EFileAndServe'. It has three tabs: 'Filing Details', 'Assoc. Parties' (selected), and 'Services'. A search bar labeled 'Search Case Parties...' is at the top. Below it is a table with columns 'Add', 'Party Name', and 'Party Type'. The table contains three rows: Jane Q. Smith (Plaintiff, unchecked), John W. Doe (Defendant, checked), and Tyler 2022.1.0.10233 Technologies (Plaintiff, unchecked). Below the table are 'Prev' and 'Next' buttons, and a 'Page 1 of 1' indicator. A 'Show Only Selected' link is below the table. At the bottom are 'CLOSE' and 'SAVE' buttons.

Add	Party Name	Party Type
<input type="checkbox"/>	Jane Q. Smith	Plaintiff
<input checked="" type="checkbox"/>	John W. Doe	Defendant
<input type="checkbox"/>	Tyler 2022.1.0.10233 Technologies	Plaintiff

Figure 6.50 – Example of the Assoc. Parties Section in the Filing Information Pane

View the parties that have been selected for the filing. To view only the parties that are selected, click **Show Only Selected**. When all of the parties are displayed, you can select a check box to add a party, or you can clear a check box to remove a party. If the filing includes a long list of parties, you can filter the parties that are associated with the filing.

Note: The **Show Only Selected** and **Show All Parties** links are toggles. Click the link for the party view that you want.

Click  .

Services

The **Services** section in the Filing Information pane includes the optional services that you can add to the filing or change for the documents that you are going to review. The fields that are displayed are pre-populated with information that was submitted by the filer.

Note: During your review, if you change any services for the filing, the change could impact the filing fees that were already assessed unless the payment type is a waiver.

Add	Multiplier	Fee	Total
<input type="checkbox"/>		Zero Fee Service Once Per Filing \$1	
<input type="checkbox"/>		Split Fee Service Once Per Filing \$10	
<input type="checkbox"/>		Certified Copies x \$17	
<input type="checkbox"/>		Per Page Fee Service Fees Assessed Per Page	
<input type="checkbox"/>		Once Per Party Once Per Filing \$10	
<input type="checkbox"/>		Priority Processing x \$4	
<input type="checkbox"/>		Placeholder Service 1 Once Per Filing \$	
<input type="checkbox"/>		Placeholder Service 2 with a long description to t Once Per Filing \$	
<input type="checkbox"/>		Placeholder Service 3 Once Per Filing \$	
<input type="checkbox"/>		Placeholder Service 4 Once Per Filing \$	
<input type="checkbox"/>		TOGA Decline Error	

Figure 6.51 – Example of the Services Section in the Filing Information Pane

If you add or change any optional services, click

SAVE

Multiple Parties Responsible for Fees

For certain case filings, more than one party on the case must be responsible for paying the fees for additional services. The eFile & Serve Review Queue allows filers to assign different parties to be responsible for fees for different additional services. During an envelope review, reviewers can make or change the selections for the responsible parties in the **Services** section of the Filing Information pane.

Note: This feature is configured by Tyler and may not be available in your application.

At least one party must be selected to be responsible for fees.

Information regarding the parties responsible for fees is displayed in the **Fees** section of the envelope details.

Description of Fees and Amounts		Payment Information	
Affidavit		Payment Account	20200821 ██████████
Filing Fee	\$5.00	Payment Type	CreditCard
Entry of Appearance (MPRFF enabled) Deffy Endant	\$20.00	Party Responsible for Fees	Deffy Endant CPA
	Filing Total: \$25.00	Order ID	000235275-0
Total Fees		Transaction Amount	\$8.00
Total Filing Fees	\$25.00	Transaction ID	212458
Payment Service Fee	\$1.00	Transaction Response	Approved
E-File Fee	\$1.00		
Court E-File Fee	\$1.00		
	Envelope Total: \$28.00		

Figure 6.52 – Example of the Party Responsible for Fees in the Fees Section in Envelope Details

Selecting Multiple Parties Responsible for Fees

In the Filing Information Services pane, you can view the parties that are responsible for fees on a case filing. You can select multiple parties that are responsible for fees for the same additional service, and you change the parties that were selected during the initial case filing.

Note: The parties that are selected as responsible to pay for additional services do not affect the party who is responsible for filing.

Note: This feature is configured by Tyler and may not be available in your application.

To view and select multiple parties that are responsible for fees:

1. From the *Review Queue* page, locate the envelope that you want to review.
2. Click the envelope.

The envelope is displayed in the Document Viewer.

3. Click the **File** tab.

The Filing Information pane is displayed.

4. Click  .

The filing information for the specified envelope is displayed.

5. Click **Services**.

The additional services are displayed.

FILING INFORMATION

Filing - Affidavit (\$5.00) - EFile

Filing Details Assoc. Parties **Services**

Show Only Selected

Add	Multiplier	Fee	Total
<input type="checkbox"/>		Certified Copies	
	x	\$17.55	
<input type="checkbox"/>		Entry of Appearance (MPRFF enabled)	
	Once Per Filing	\$20	
		Associate Parties	
<input type="checkbox"/>		Exemplification of Record (MPRFF enabled)	
	Once Per Filing	\$20	
		Associate Parties	
<input type="checkbox"/>		Issue Writ of Execution (MPRFF Enabled)	
	Once Per Filing	\$20	
		Associate Parties	
<input type="checkbox"/>		Once Per Party	
	Once Per Filing	\$10	
<input type="checkbox"/>		Per Page Fee Service	
		Fees Assessed Per Page	
<input type="checkbox"/>		Priority Processing	
	x	\$17.55	
<input type="checkbox"/>		Split Fee Service	
	Once Per Filing	\$10	

CLOSE
SAVE

Figure 6.53 – Example of the Services Section in the Filing Information Pane

6. Select an additional service from the list.

Note: In the examples, only the services with the designation “Associate Parties” under the name of the additional service can be selected when multiple parties are responsible for fees. The wording in your application may differ from the wording shown in the examples.

The *Associate Parties to Additional Service* window is displayed.

Associate Parties to Additional Service

Entry of Appearance (MPRFF enabled)

At least one Associated Party must be checked. If no party is selected, the "Entry of Appearance (MPRFF enabled)" service will be deselected

	Party Name	Use Waiver	Waiver Account	Total
<input type="checkbox"/>	Deffy Endant CPA			
<input type="checkbox"/>	Plai Entiff Esq			

[Show Only Selected](#)

CANCEL
CONTINUE

Figure 6.54 – Example of an Associate Parties to Additional Service Window

7. Select a party to associate with the additional service.

The selected party and the cost of the additional service are displayed.

Party Name	Use Waiver	Waiver Account	Total
<input checked="" type="checkbox"/> Deffy Endant CPA	<input type="checkbox"/>		\$20.00
<input type="checkbox"/> Plai Entiff Esq			

Figure 6.55 – Example of an Associate Parties to Additional Service Window with the Party and Cost Displayed

8. If the party and the service are correct, click

CONTINUE

When parties have been associated to an additional service, the text under the name of the service shows **X Parties Associated** and is a link to access the *Associate Parties to Additional Service* window.

9. Click

SAVE

Service Contact Information

Use the **Serve** tab to access the Service Contact Information pane.

The Service Contact Information pane displays information about the service contacts associated with the case filing. This pane is read-only. The information in the pane cannot be changed; it is derived from the information that the filer entered when creating the electronic filing.

SERVICE CONTACT INFORMATION

Service **(2 of 2)**

<p>Doe, Jane jtpgbzlu, ghrusohk ghrusohk.jtpgbzlu@tylertech.com 5501 Tennyson Pkwy, Plano, Texas</p>	<p>Defendant Eserve</p>
<p>Doe, Johnny Ford, Henry hford@abc.com 5100 Tennyson Pkwy, Plano, Texas</p>	<p>Plaintiff Eserve</p>

Prev **1** Next Page 1 of 1

← FILING
FEES AND PAYMENT →

Figure 6.56 – Example of a Service Contact Information Pane

Click ← FILING or the **File** tab to return to the Filing Information pane. Click FEES AND PAYMENT → or the **Fees** tab to navigate to the Fees and Payment Information pane.

Note: At any point, click any tab to navigate to that section of the envelope.

Fees and Payment Information

Use the **Fees** tab to access the Fees and Payment Information pane.

The Fees and Payment Information pane displays information about the fees that are associated with the case filing.

FEES AND PAYMENT INFORMATION	
Description of Fees and Amounts	
Abstract Of Judgment	
Filing Fee	\$5.00
Filing Total: \$5.00	
Total Fees	
Total Filing Fees	\$5.00
Court Case Fee	\$5.00
Payment Service Fee	\$1.00
E-File Fee	\$1.00
Court E-File Fee	\$1.00
Provider E-File Fee	\$10.00
Provider Tax	\$0.63
Envelope Total: \$23.63	
Payment Information	
Payment Account	
-AMEX	
Payment Type	
CreditCard	
Party Responsible For Fees	
Jane Doe VI - Plaintiff	x ▼
Claim Amount	
1000	
← SERVICE CONTACT	

Figure 6.57 – Example of a Fees and Payment Information Pane

The filing fee that is displayed is the filing fee in effect at the time the envelope was submitted unless the docket date was changed. If the docket date was changed, the filing fee that is displayed reflects the changes that were made manually. In some instances, the filing fee is determined by the original docket date for a copied envelope.

The Fees and Payment Information pane also shows the party that is responsible for fees for the filing. The fees that are listed reflect the selections that were made in the **Services** section in the Filing Information pane. If applicable, you can change the party responsible for fees for the case filing. When you delete the current party responsible for fees, a window will be displayed. You must then select a different party from the **Party Responsible For Fees** drop-down list.

[← SERVICE CONTACT](#)

Click [← SERVICE CONTACT](#) or the **Serve** tab to return to the Service Contact Information pane.

Note: At any point, click any tab to navigate to that section of the envelope.

Viewing and Verifying a Draw-Down Account Balance During Review

During an envelope review, you can view and verify the account balance if a filer has used a draw-down account for payment of the fees.

To view and verify a draw-down account balance during an envelope review:

1. On the *Review Queue* page, locate the envelope that you want to review.
2. Click the **Fees** tab.

The Fees and Payment Information pane is displayed.

FEES AND PAYMENT INFORMATION

Description of Fees and Amounts

Abstract Of Judgment	
Filing Fee	\$5.00
	Filing Total: \$5.00
Action - Initial Only	
Filing Fee	\$5.00
	Filing Total: \$5.00
Total Fees	
Total Filing Fees	\$10.00
Court Case Fee	\$10.00
E-File Fee	\$22.00
Court E-File Fee	\$1.00
	Envelope Total: \$43.00

Payment Information

Payment Account
DD 5.27

Payment Type
DrawDown [Verify Draw Down](#)

Party Responsible For Fees
Sally Smith - Plaintiff x ▼

[← SERVICE CONTACT](#)

Figure 6.58 – Example of a Fees and Payment Information Pane

Verify Draw Down

3. In the **Payment Information** section, click

The *Draw Down Balance* window is displayed.

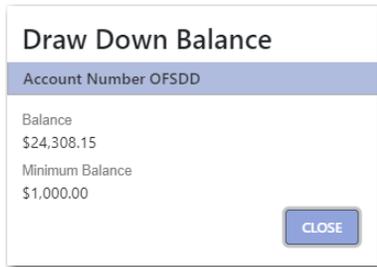


Figure 6.59 – Example of a Draw Down Balance Window

4. View and verify the draw-down balance.

5. Click  .

Charge Information

Use the **Charge** tab to view the charge information for the specified case.

Note: Charge information is available only for criminal cases. Likewise, the Charge tab is displayed only for criminal cases.

Viewing Criminal Case Information

Reviewers can see all of the criminal charges, as well as the additional party fields, that are submitted for a criminal case.

Note: You must have “Reviewer” rights to perform this procedure.

To view criminal case information:

1. On the *Review Queue* page, click the envelope that you want to review.

The envelope is displayed, and the **All** tab is highlighted. Summary information for the specified envelope is displayed. The **Charge** tab is also displayed for criminal cases.

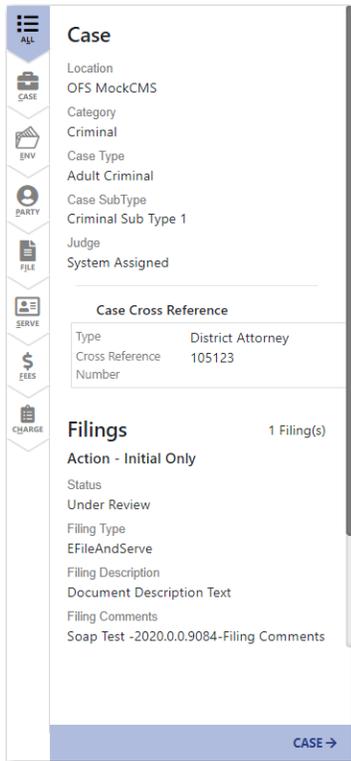


Figure 6.60 – Example of an Envelope with the Tabs Displayed

- To view case information, click the **Case** tab.

The Case Information pane is displayed.

- View the category and case type to verify that this is a criminal case. Change any information, as applicable.
- Click the **Party** tab to view the party information.
- The Party Information pane is displayed.
- Click the row of the party for which you want to view additional information.

The Party Detail pane for the specified party is displayed. If necessary, scroll down to view the criminal party data, which is displayed after the other party data.

PARTY DETAIL

75093

DETAILS

Driver License Type	Driver License State	
Class A	Texas	
Driver License Number	DL Expiration Date	
12345678	07/25/2026	
Gender	Language	
Male	English	
Race		
White		
Hair	Eyes	
Black	Brown	
Height Feet	Inches	Weight
5	10	205
	SID	
	1234	
FBI		
9005354-14		
Citizenship	Ethnicity	
United States of Am	Non Hispanic	

Physical Features + Add

CANCEL SAVE

Figure 6.61 – Example of a Party Detail Pane with Details Displayed

6. Change any party information, as applicable.

7. Click .

8. Click the **Charge** tab.

The Charge Information pane is displayed.

CHARGE INFORMATION

+ Add New Charge

Charges	
Kathy (SDF)	
ABUSE OF CORPSE WITHOUT LEGAL AUTHORITY	
12/31/23 6:00 PM CDT	
10990015 (FDF)	
AGG KIDNAPPING TERRORIZE	
TRN 34444 TRS 55555	
~5/1/24-~5/2/24 ~9:00 AM CDT-~11:00 AM CDT	
Statute 456	

← FEES AND PAYMENT

Figure 6.62 – Example of a Charge Information Pane

9. Click a charge to view more information about that charge.
The Charge Detail pane for the specified charge is displayed.

CHARGE DETAIL

Charge Information

Offense Code
10990015

Description *
AGG KIDNAPPING TERRORIZE

Citation #

TRN 34444	TRS 55555
--------------	--------------

Offense Date
05/01/2024

Range To
05/02/2024

On or about

Offense Time
09:00 AM

Range To
11:00 AM

At or about

Degree *
Second Degree Fel

Statute
456

GOC Select...	Phase Arrest Filing
------------------	------------------------

Bond Amount 1000.00	Bond Type Cash Bond
------------------------	------------------------

Arrest Date
05/03/2024

Arresting Agency
Lewisville Police De

Arrest Number
34567

Arrest Location
Tarrant

Officer Badge
4589

Additional Statutes + Add

No additional statutes

CLOSE
SAVE

Figure 6.63 – Example of a Charge Detail Pane

10. Review the information in the Charge Detail pane. If you need to change any information, make the necessary changes. Then, click **SAVE**.

11. If you want to add a new charge, in the Charge Information pane, click **+ Add New Charge**.

The *Offenses* window is displayed.

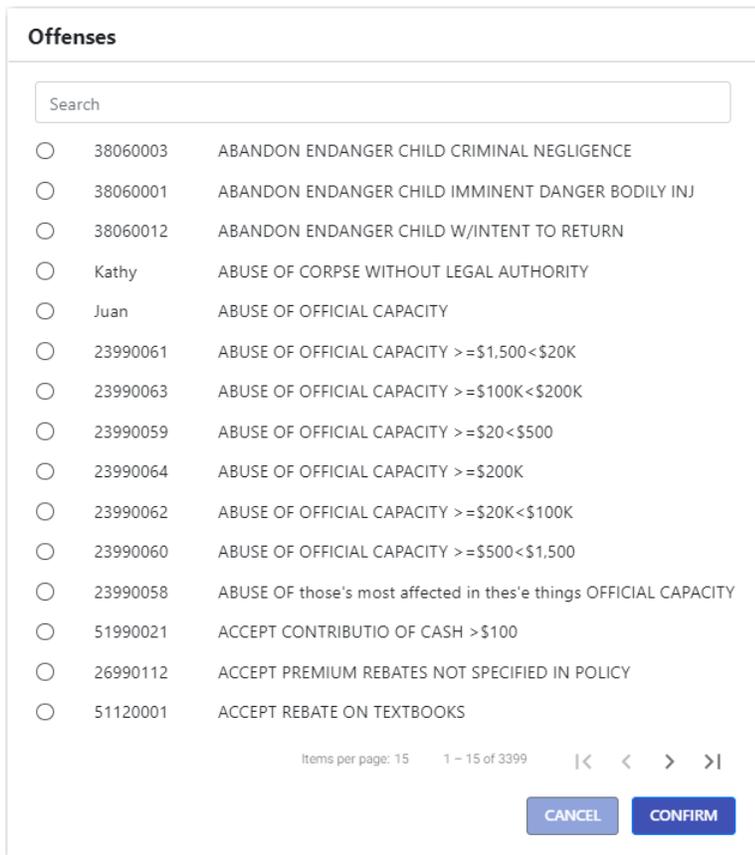


Figure 6.64 – Example of an Offenses Window

12. Select the offense for the new charge, and then click



13. Enter the rest of the information for the new charge in the Charge Detail pane.

14. Click



15. After reviewing the charges associated with the case, click



or



Viewing Citation Information

You can view citation information for the citations associated with the case.

Note: You must have “Reviewer” rights to perform this procedure.

To view citation information:

1. On the *Review Queue* page, click the envelope that you want to review.
2. Click the **Charges** tab.

The Charge Information pane is displayed.

CHARGE INFORMATION

+ Add New Charge

Charges

240.906 (MC)
This is statute description text and it's required for
statute charge
(Conspired)
TRN 888 TRS 1
~12/20/23 6:00 PM CDT
Statute 6091752
Citation C1113 [VIEW CITATION](#)

[← FEES AND PAYMENT](#)

Figure 6.65 – Example of a Charge Information Pane

3. Click [VIEW CITATION](#).

The Citation Information pane is displayed.

CITATION INFORMATION

Citation Details

Citation Number
C1113

Citation Jurisdiction
County Sheriff's Office

Citation Date/Time
12/20/2018 06:00:00 AM

Location
Downtown

Charge(s)

VIOLATION OF BURN BAN

Vehicle Associated To

License Plate Number State
BFX 3333

Vehicle Type
2 Door

Vehicle Year
2013

Vehicle Make
Lexus

Vehicle Color
Black

Commercial Vehicle

Hazardous Material

Posted Speed limit (MPH) Actual Speed (MPH)

CLOSE CONTINUE

Figure 6.66 – Example of a Citation Information Pane

4. Review the information in the Citation Information pane, and then click



7 Document Viewer 1

Topics covered in this chapter

◆ Document Review Options

Document Viewer 1 displays the currently selected filing document.

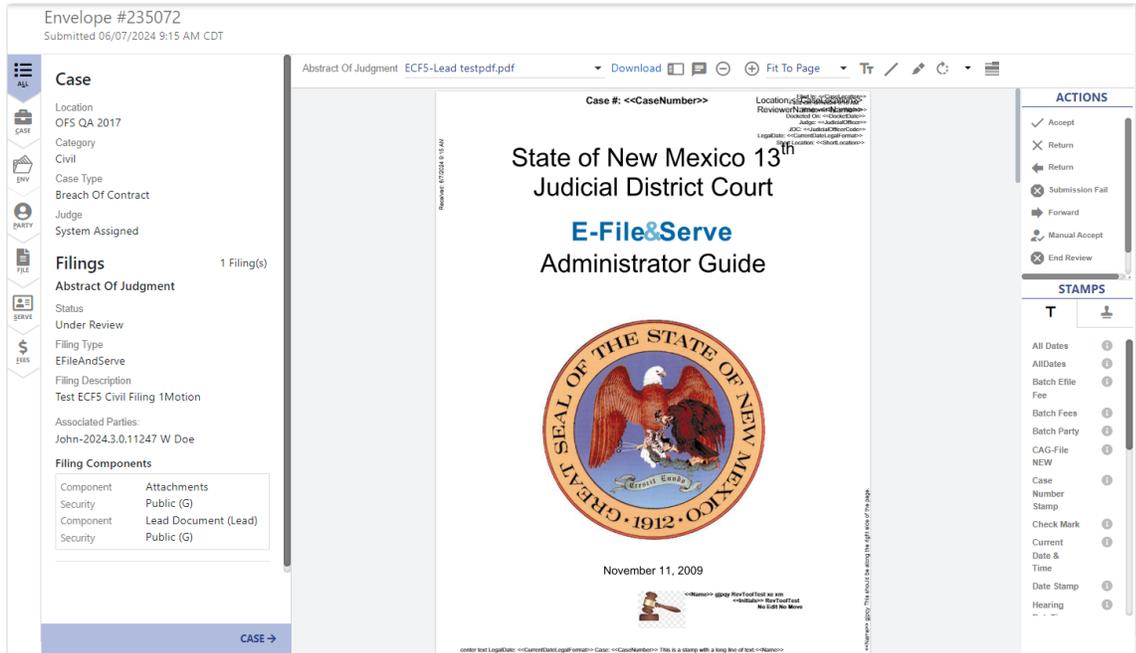


Figure 7.1 – Example of a Test Document in Document Viewer 1

Above the Document Viewer, the document selector drop-down list is displayed. It includes a list of the documents that are associated with the current filing, along with the document sizes. Select the document that you want to review from the drop-down list. The description of the filing that contains the selected document is displayed to the left of the document selector drop-down list.



Figure 7.2 – Example of a Document Selector Drop-Down List

Download

If you want to download the original document, click

Other document options are available, as follows:

- Thumbnail icon () for viewing pages of the document in Thumbnail view

Note: This icon is a toggle that opens or closes the Thumbnail view.

- Process Notes icon (), which you can use to open the Process Notes pane
Note: This icon is a toggle that opens or closes the Process Notes pane. An asterisk indicates that a process note has been added to the document.
- Zoom Out icon ()
- Zoom In icon ()
- **Fit To Page** options

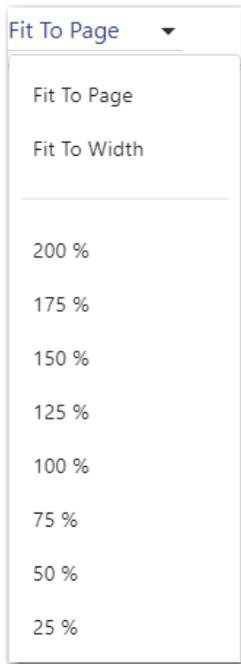


Figure 7.3 – Fit To Page Drop-Down List

- Insert Text icon ()
- Draw a Line icon ()
- Draw Highlight icon ()
- Rotate Document icon ()
- Font Drop-Down icon () to access font and line choices

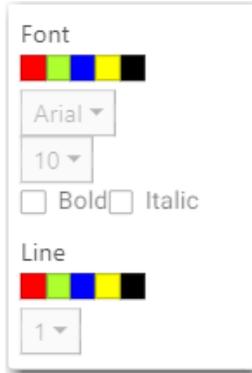


Figure 7.4 – Example of the Available Font and Line Options for Document Review

- Redaction icon () to begin the redaction process for the document under review
- Refresh Redaction icon () to refresh the redactions

The right pane consists of filing actions and stamps that you can use when you are reviewing documents.

Document Review Options

When you review a document, you have several options for how to handle the document.

The right pane includes the following options:

- Actions pane, to access review actions
- Stamps pane, to apply text and/or image stamps to the reviewed document

Above the Document Viewer, you can access the annotations tools.

Process Notes

You can add process notes to an envelope you are reviewing.

The Process Notes pane is available in the Document Viewer. Click  to open or close the Process Notes pane.

Note: An asterisk indicates that a process note has been added to the document.

The screenshot shows a 'Process Notes' interface. At the top is a text input field labeled 'Add comment...'. Below it is a 'Viewable By' dropdown menu currently set to 'My Organization', with a blue 'SAVE NOTE' button to its right. Underneath is a search field labeled 'Search Notes...'. A document summary section shows 'System Page 1 08/16/2021 7:22 AM CDT', 'Filing Code: Abstract Of Judgment', 'Document: Lead Document - InitialFiling one QA1-SOAPtest.pdf', and the note text 'document needs to be fixed'.

Figure 7.5 – Example of a Process Notes Pane

Add any comments that you want in the **Add comment...** field. Then, click .

Note: The process note is saved on the document page on which you placed the note.

You can also select the reviewers whom you want to have access to viewing your note. Select your desired reviewers from the **Viewable By** drop-down list.

The screenshot shows the 'Viewable By' dropdown menu expanded. The current selection is 'My Organization'. The dropdown list contains the following options: 'Select...' (highlighted in blue), 'My Organization', and 'All Users'.

Figure 7.6 – Example of a Viewable By Drop-Down List

Redaction

You can view a redacted document that is attached to a filing, in addition to the original document.

Note: The Redaction feature is configured by Tyler and may not be available in your application.

The **Redactions** section is located above the Document Viewer.

If you have the rights to redact the document, click  to begin the redaction process.

The following window is displayed.

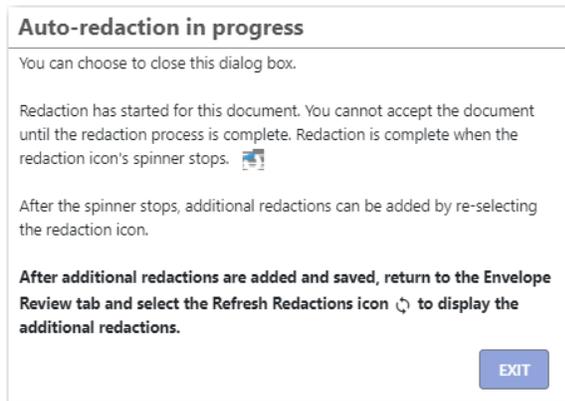


Figure 7.7 – Auto-Redaction in Progress Window

If you want to close the window, click **Exit**.

After a document has been redacted, a banner is displayed in the Document Viewer indicating that the redaction is complete.

One or more documents have been redacted. Please check the redactions on this document and review it. If you have rights to edit the redactions on this document, you can click the REDACTION button in the annotations section to open the Redaction Editor in a separate window.

Figure 7.8 – Example of a Banner for Redacted Documents

Click  to refresh the redactions view. The number of redactions in the document is displayed next to the Redactions icon ().

When the document is displayed for redacting, it opens in the *Redaction Viewer* window in a new tab in your browser. You can make changes to the redacted document while it is displayed in the *Redaction Viewer* window. If you make changes to the redacted document, a confirmation message is displayed.

Close the *Redaction Viewer* window when you are finished working with the redacted document.

Add Annotations

When you are reviewing a document in an envelope, you can add annotations to the document from the annotations available above the Document Viewer pane.

Note: You must have “Reviewer” rights to use the Annotations feature.

Note: After you click an annotation, it remains available in the cursor so it can be applied multiple times. To stop a specific annotation from being applied, click the annotation above the Document Viewer again, or press ESC.

The following options are available:

- Insert Text icon ()
- Draw a Line icon ()
- Draw Highlight icon ()
- Rotate Document icon ()
- Font Drop-Down icon () to access font and line choices

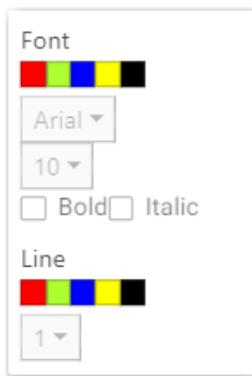


Figure 7.9 – Example of the Available Font and Line Options for Document Review

Add Stamps

You can add text or image stamps to a document you are reviewing.

Note: You must have “Reviewer” rights to apply stamps to a document.

You can access the available stamps from the stamps in the right pane. The stamps can be placed anywhere on the document. You can also group the stamps as you are adding them, and move the group to another location on the document as needed.

Note: After you click a stamp, it remains available in the cursor so it can be applied multiple times. To stop a specific stamp from being applied, click the stamp in the Stamps panel again, or press ESC.

Text Stamps

You can add a text stamp to the document you are reviewing. The stamps are listed by their name. You can hover over the Information icons to view the text for the specified stamp.

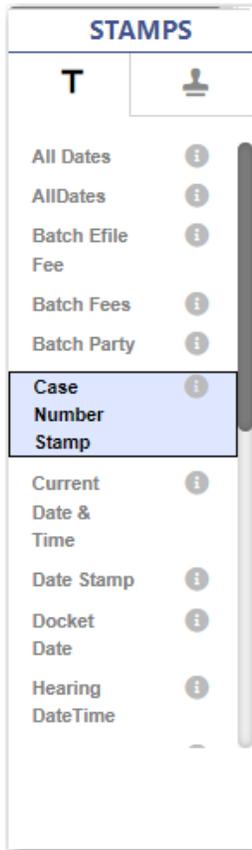


Figure 7.10 – Example of a “Case Number Stamp” Selected in the Text Stamps Pane

Image Stamps

You can add image stamps to the document you are reviewing. You can enlarge or reduce the size of the stamp as needed.



Figure 7.11 – Example of a “Supreme Court Seal” Stamp in the Image Stamps Pane

8 Document Viewer 2

Topics covered in this chapter

- ◆ General Menu Functions
- ◆ Menu Icon Options
- ◆ Document Viewer Icons and Options
- ◆ Reviewer Comments
- ◆ Reviewer Actions

Document Viewer 2 is now available for courts in which it has been configured. Viewer 2 provides expanded options for reviewers when they are working with documents. Viewer 2 offers more capability for applying text and image stamps. Reviewers can create and use colors, fonts, and font sizes for comments during a review session.

Note: After your court has been configured to use Viewer 2, you can no longer use Viewer 1.

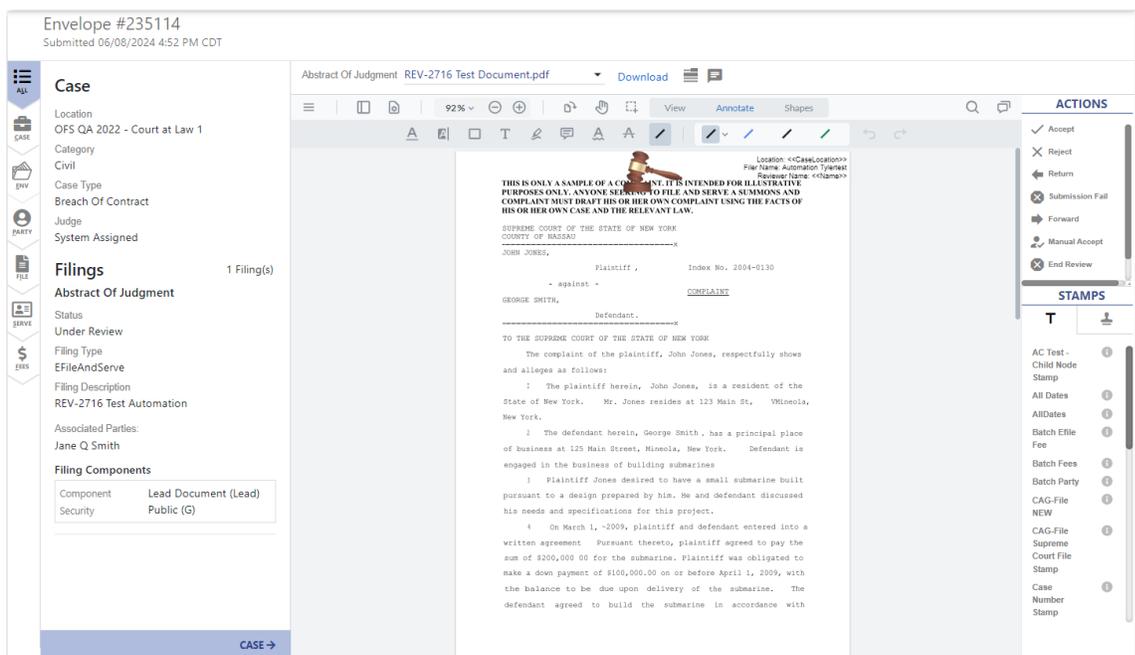


Figure 8.1 – Example of a Document Displayed in Viewer 2

Some icons in the Document Viewer are available to use any time a document is displayed. Another set of icons becomes available after the reviewer clicks a particular button.

When the Document Viewer opens, the document under review is displayed, along with the basic viewer panel of icons and options. After you click some of the icons or buttons, other panels or options are displayed.

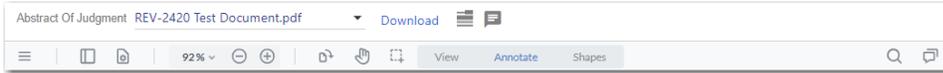


Figure 8.2 – Example of a Basic Viewer Panel

The buttons on the left side of the basic viewer panel are used for general functions that you can perform.

The following buttons are displayed in the basic viewer panel at all times, but the **Annotate** and **Shapes** buttons require you to click them to reveal more options:

- **View**—Default option when the Document Reviewer opens.
- **Annotate**—Opens a row of annotation options that allow the reviewer to apply styling, shapes, fonts, highlights, and colors directly to the document under review.
- **Shapes**—Opens a row of shape options that allow the reviewer to apply more shapes and highlights directly to the document under review.

General Menu Functions

The buttons on the left side of the basic viewer panel are used to perform general Document Viewer functions such as choosing your document viewing options. These buttons are displayed at all times.

The following are descriptions of the general menu functions:

- Click  to display a drop-down list of the Menu icon options.
- Click  to open or hide a panel of Thumbnail views of the document in the viewer.

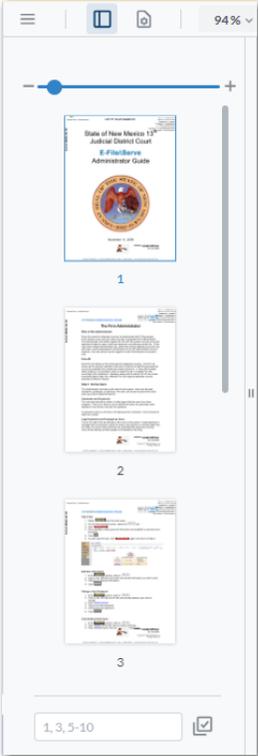


Figure 8.3 – Example of a Thumbnail View of the Document in the Viewer

- Click  to view options for page controls.

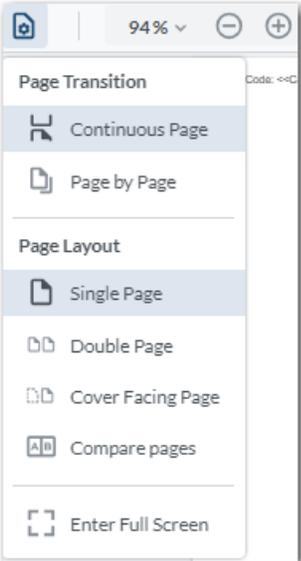


Figure 8.4 – Example of a Page Controls Drop-Down List

- Click  to view zoom options.

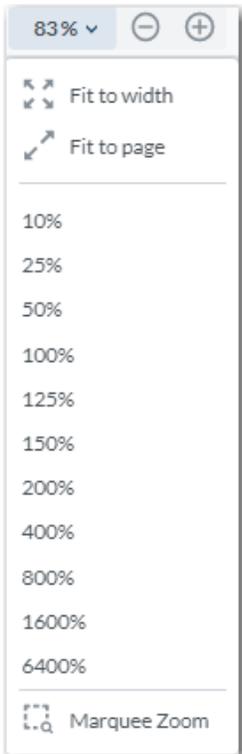


Figure 8.5 – Example of a Zoom Drop-Down List

Menu Icon Options

You can access the Menu icon options from the basic viewer panel.

To access the Menu icon options:

1. From the viewer panel, click  .
A drop-down list of Menu icon options is displayed.

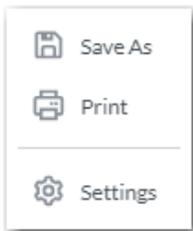
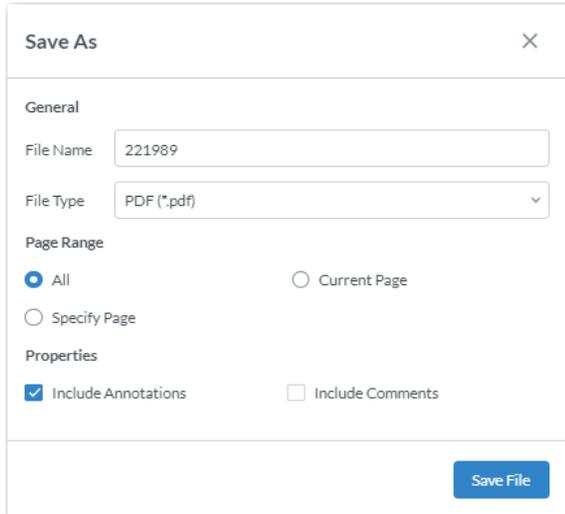


Figure 8.6 – Drop-Down List of Menu Icon Options

2. Select **Save As** to save the document that is under review. The *Save As* window is displayed.



Save As [X]

General

File Name: 221989

File Type: PDF (*.pdf)

Page Range

All Current Page

Specify Page

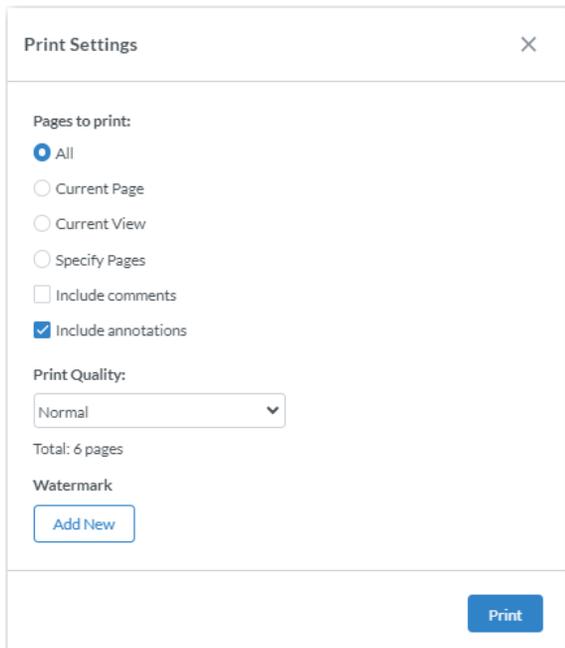
Properties

Include Annotations Include Comments

Save File

Figure 8.7 – Example of a Save As Window

3. Complete the required fields, and then click .
4. Select **Print** to print the document that is under review.
The *Print Settings* window is displayed.



Print Settings [X]

Pages to print:

All Current Page

Current View Specify Pages

Include comments Include annotations

Print Quality:

Normal

Total: 6 pages

Watermark

Add New

Print

Figure 8.8 – Example of a Print Settings Window

5. Complete the required fields, and then click .

Settings Options

To select the **Settings** options:

1. Click **Settings** to select the window settings for the Document Viewer.

The *Settings* window is displayed. The default option is **General**.

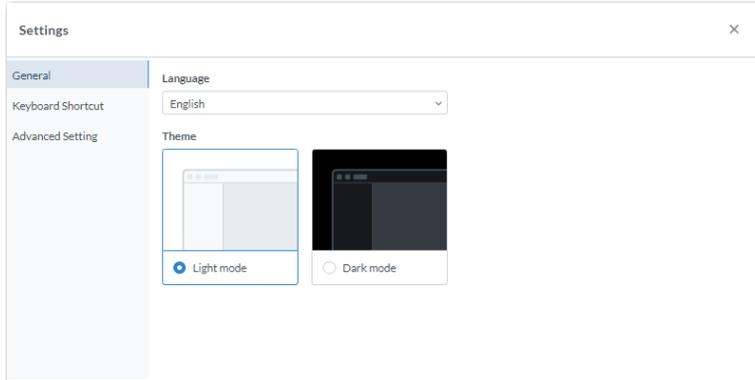


Figure 8.9 – Example of a Settings Window—General

2. Select the language that you want to view during your document review. Also, select **Light mode** or **Dark mode**. Then, close the window.

3. In the *Settings* window, click **Keyboard Shortcut**.

The keyboard shortcuts are displayed.

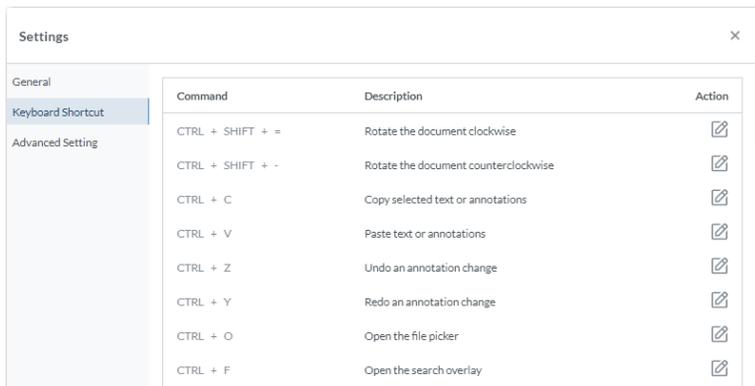


Figure 8.10 – Example of a Settings Window—Keyboard Shortcuts

4. You can edit the commands for the keyboard shortcuts if you want. Close the window when you are done.

5. In the *Settings* window, click **Advanced Setting**.

The options for advanced settings are displayed.

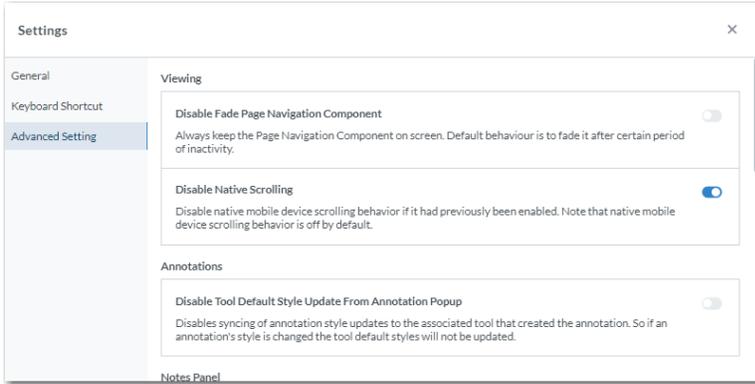


Figure 8.11 – Example of a Settings Window—Advanced Settings

6. Enable or disable the settings that you want to use for viewing your document. Then, close the window when you are done.

Document Viewer Icons and Options

The icons available in Viewer 2 are described in the following sections.

General Icons, Buttons, and Links

Note: The screen shots of the icons in the following table are examples. Some of the icons can be set to a different color than the color that is shown. The icons are available at all times when the Document Viewer is displayed.

Icons	Description
	View the filing code for the envelope that you are reviewing. Note: The example shows just one possible filing code. Note that various filing codes can be configured in your application.
	Select the document to review from the document selector drop-down list.
	Click the Download link to download the original document.
	Click the Redaction icon to open the redacted document in the <i>Redaction Viewer</i> window.
	Click the Refresh Redaction icon to refresh the redactions.
	Click the Process Notes icon to add a process note or to view process notes that were previously added. Note: This icon is a toggle that opens or closes the Process Notes pane. An asterisk indicates that a process note has been added to the document.

Icons	Description
	Click the icon to open a drop-down list of menu options that you can set while working in the viewer.
	Click the icon to open a panel of Thumbnail views of the document in the viewer. Note: This icon is a toggle that opens or hides the panel. Note: A similar option is available with Viewer 1.
	Click the icon to open a drop-down list for page options for page transition and page layout. Note: A similar option is available with Viewer 1.
	Click the icon to open a drop-down list for zoom options. Note: A similar option is available with Viewer 1.
	Click the icon to zoom out and reduce the size of the document that is displayed. Note: A similar option is available with Viewer 1.
	Click the icon to zoom in and enlarge the size of the document that is displayed. Note: A similar option is available with Viewer 1.
	Click the icon to rotate the page 90 degrees in a clockwise direction. Click the icon again to continue to rotate the document. Each click rotates the page 90 degrees in a clockwise direction.
	Click the icon to pan the document when you are zoomed in and need to view the rest of the document.
	Click the icon to select auto added and manually added stamps and notations.
	Click the button to view the document. Note: This button is enabled by default when the Document Viewer opens.
	Click the button to access the icons available on the Annotate panel.
	Click the button to access the icons available on the Shapes panel.
	Click the icon to open the Search panel to search the document for a specified word.
	Click the icon to open the Comments panel. Note: This icon is a toggle that opens or hides the panel.

Icons	Description
	Note: The comments that are added in the Comments panel are different from Process Notes.
	Click the icon to display the status options for a comment in the Comments panel. Note: The comments that are added in the Comments panel are different from Process Notes.
	Click the icon to open an action menu for the status that was applied to a comment in the Comments panel. Note: The comments that are added in the Comments panel are different from Process Notes.
	Click the icon to filter the comments in the Comments panel. Note: The comments that are added in the Comments panel are different from Process Notes.
	Click the icon to open the comment card in the Comments panel for the manual stamps, auto stamps, and annotations that you applied to the document under review.
	Click the icon to rotate the image that you applied to the document under review.
	Click the icon to group two or more annotations that you applied to the document under review.
	Click the icon to ungroup two or more annotations that you previously applied to the document under review and had grouped.

Annotate Icons

When you click **Annotate**, the Annotate panel is displayed.



Figure 8.12 – Example of an Annotate Panel

Icons	Description
	Click the icon to underline a part of the document under review. Note: You can select favorite colors for the underline from the color palette. The favorite colors are displayed in the Annotate panel.
	Click the icon to apply a highlight to a part of the document under review. Note: You can select favorite colors for the highlight from the color palette. The favorite colors are displayed in the Annotate panel.

Icons	Description
	<p>Click the icon to apply a rectangle to a part of the document.</p> <p>Note: You can select favorite colors for the rectangle from the color palette. The favorite colors are displayed in the Annotate panel.</p>
	<p>Click the icon to apply free text to the document.</p> <p>Note: You can select favorite colors for the free text from the color palette. The favorite colors are displayed in the Annotate panel.</p>
	<p>Click the icon to apply a freehand highlight to a part of the document.</p> <p>Note: You can select favorite colors for the highlight from the color palette. The favorite colors are displayed in the Annotate panel.</p>
	<p>Click the icon to apply a note to the document. Other reviewers can see the notes that you apply if you save them.</p> <p>Note: You can select favorite colors for the note from the color palette. The favorite colors are displayed in the Annotate panel.</p>
	<p>Click the icon to apply a squiggly underline to a part of the document under review.</p> <p>Note: You can select favorite colors for the squiggly from the color palette. The favorite colors are displayed in the Annotate panel.</p>
	<p>Click the icon to strike out a part of the document under review.</p> <p>Note: You can select favorite colors for the strikeout from the color palette. The favorite colors are displayed in the Annotate panel.</p>
	<p>Click the icon to apply a straight line to a part of the document under review.</p> <p>Note: You can select favorite colors for the line from the color palette. The favorite colors are displayed in the Annotate panel.</p>
	<p>Click the icon when the drop-down arrow is displayed to open the Annotate options window.</p> <p>Note: The icon that is shown is an example. The drop-down arrow may be displayed for many of the icons in the Annotate options window. When the arrow is displayed for an icon, you can open the Annotate options window for that icon.</p>

Icons	Description
	Click the icon, when available, to undo the previous action that you just took. Note: This action is available only during your current review session. If you end your review and return to it at another time, the Undo icon will not be available.
	Click the icon, when available, to redo the action that you just undid. Note: This action is available only during your current review session. If you end your review and return to it at another time, the Redo icon will not be available.

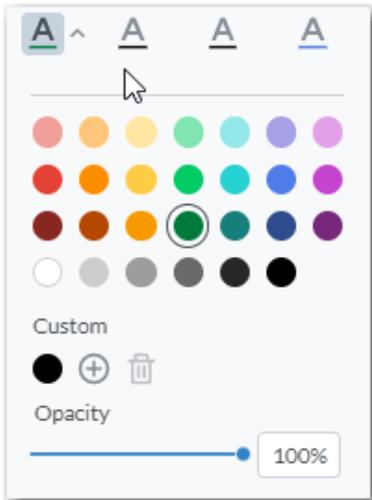


Figure 8.13 – Example of an Annotate Options Window

Shapes Icons

When you click **Shapes**, the Shapes panel is displayed.



Figure 8.14 – Example of a Shapes Panel

Icons	Description
	Click the icon to apply a rectangle to a part of the document. Note: You can select favorite colors for the rectangle from the color palette. The favorite colors are displayed in the Shapes panel.
	Click the icon to apply a freehand highlight to a part of the document. Note: You can select favorite colors for the highlight from the color palette. The favorite colors are displayed in the Shapes panel.

Icons	Description
	<p>Click the icon to apply a straight line to a part of the document under review.</p> <p>Note: You can select favorite colors for the line from the color palette. The favorite colors are displayed in the Shapes panel.</p>
	<p>Click the icon to apply an ellipsis to a part of the document under review.</p> <p>Note: You can select favorite colors for the ellipsis from the color palette. The favorite colors are displayed in the Shapes panel.</p>
	<p>Click the icon, when available, to undo the previous action that you just took.</p> <p>Note: This action is available only during your current review session. If you end your review and return to it at another time, the Undo icon will not be available.</p>
	<p>Click the icon, when available, to redo the action that you just undid.</p> <p>Note: This action is available only during your current review session. If you end your review and return to it at another time, the Redo icon will not be available.</p>

Reviewer Comments

Viewer 2 provides many options for applying and controlling comments added by reviewers. You can also apply text and images to the document, and then take actions on them after they are applied.

Reviewer comments are displayed on the right side of the Document Viewer. The Comments panel includes comments that were added by the reviewers, as well as auto and manual text stamps and images that were applied. You can search on both the reviewer comments and the stamp text.

To work with reviewer comments:

1. Click  to display the Comments panel.

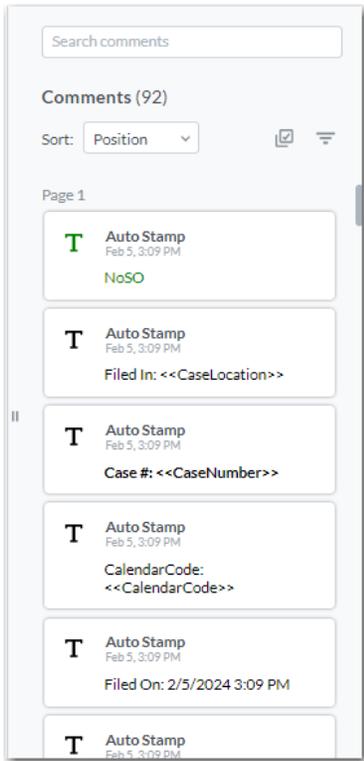


Figure 8.15 – Example of the Comments Panel

2. Sort the order of the comments by date, status, author, type, or color.

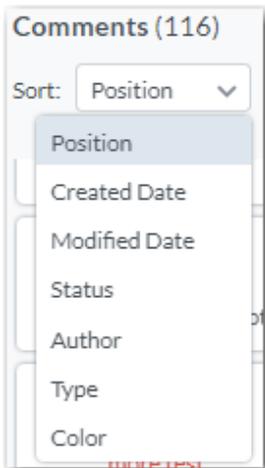


Figure 8.16 – Example of a Comments Sort Drop-Down List

3. Click a specified comment to access more options regarding that comment.

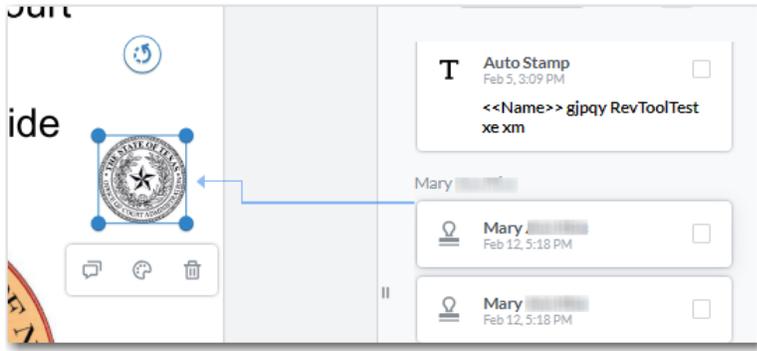


Figure 8.17 – Example of a Comments Panel

4. Click  to display status options for the specified comment. You can select a status to apply.

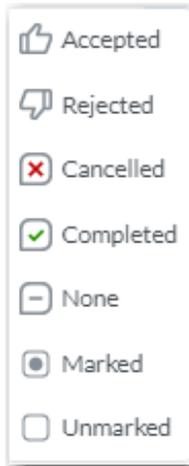


Figure 8.18 – Example of Status Options

5. Click  to open an action menu for the status that was applied. You can edit the status, or you can delete it.

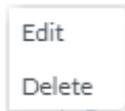


Figure 8.19 – Status Action Menu

6. Click  to filter the comments.



Figure 8.20 – Example of Comments Filter Options

Reviewer Actions

After you add a text or an image to the document under review, you can take more actions on the item you added.



Figure 8.21 – Options for Text and Images Attached to Documents

To take actions on text or image stamps:

1. Click  to open the Comments panel.
2. Click  to open the Text Style options.

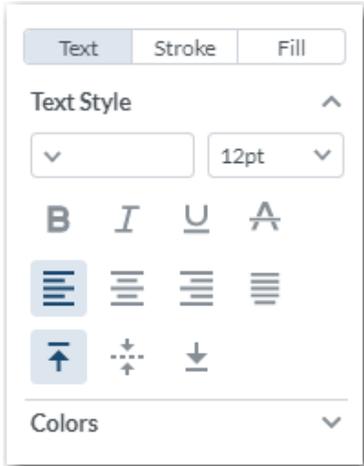


Figure 8.22 – Text Style Options

3. Click the arrow to display the available text color options. You can create custom colors and opacity.

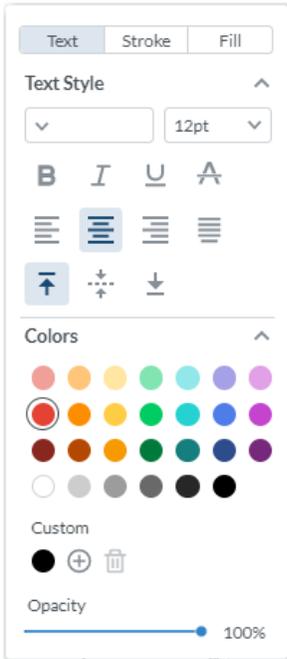


Figure 8.23 – Text Style and Colors Options

4. Click **Stroke** to open the Stroke options. You can create custom colors, opacity, and stroke.

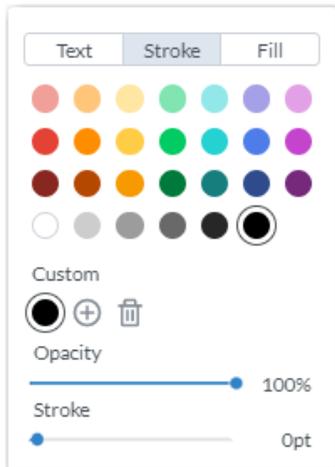


Figure 8.24 – Stroke Options

5. Click **Fill** to open the Fill options. You can create custom colors for fill and opacity.

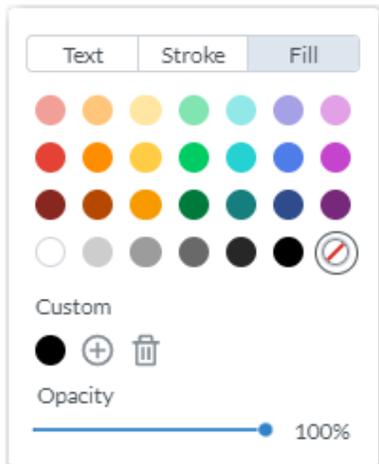


Figure 8.25 – Fill Options

6. Click  to group two or more annotations that you applied to the document.
7. Click  to ungroup two or more annotations that you previously had grouped.
8. Click  to delete the text or image from the document.

9 Filing Actions

Topics covered in this chapter

- ◆ Accepting a Filing
- ◆ Accepting Multiple Filings
- ◆ Returning a Filing
- ◆ Returning Multiple Filings
- ◆ Rejecting a Filing
- ◆ Failing Submission of a Filing
- ◆ Forwarding an Envelope
- ◆ Manually Accepting a Filing
- ◆ Sending a Filing Back to the Filer
- ◆ Ending Review of an Envelope
- ◆ Deferring Review of an Envelope

When you are reviewing a filing, you can take action on that filing by using one of the options in the Actions pane on the right side of the eFile & Serve Review Queue.

Note: Your site might include different filing actions from the ones shown in the following example.

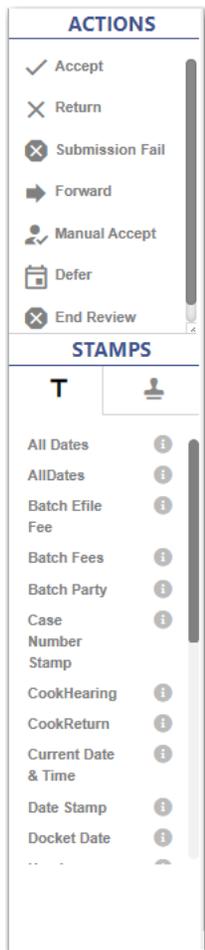


Figure 9.1 – Example of an Actions Pane

The following options are available:

- **Accept**—Accept the filing, and then type any relevant comments in the *Accept Filing* dialog box.
- **Accept Multiple Filings**—Accept multiple filings in an envelope, and then type any relevant comments in the *Accept Filing* dialog box.
- **Return**—Return the filing, select a reason, and then type any relevant comments in the *Return Filing* dialog box.
Note: The verbiage for this option is configured by Tyler. Your screen may differ from the screen shots provided in this document.
- **Return Multiple Filings**—Return multiple filings, select a reason, and then type any relevant comments in the *Return Filing* dialog box.
- **Reject**—Reject a filing, select a reason, and then type any relevant comments in the *Reject Filing* dialog box.
- **Submission Fail**—Fail the envelope if a filing in the envelope is submission failed.
Note: This option is configured by Tyler and may not be available in your application.
- **Forward**—Forward the envelope to another queue that you have selected from the drop-down list in the *Forward Envelope* dialog box.

- **Manual Accept**—Manually accept a filing by typing the case number of the filing in the **Case Number** field.
Note: This option is configured by Tyler and may not be available in your application.
- **Send Back to Filer**—Send a filing back to the filer.
Note: This option is configured by Tyler and may not be available in your application.
- **End Review**—End the review of the envelope; you can continue your review at another time.
- **Defer**—Defer the envelope for review on another date in the future.

Accepting a Filing

When you are reviewing a filing, you can accept it if you are satisfied with its contents.

To accept a filing:

1. In the Actions pane, click **Accept**.

The *Accept Filing* dialog box is displayed.

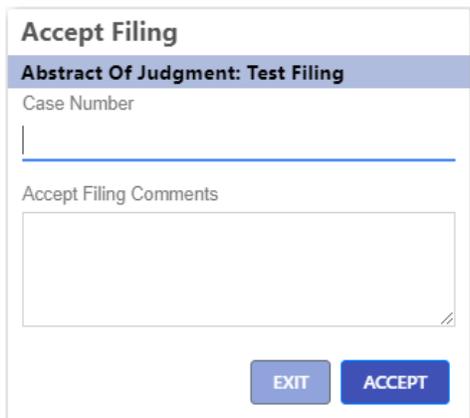


Figure 9.2 – Example of an Accept Filing Dialog Box

2. Type the case number in the **Case Number** field, if applicable.
3. If applicable, type your comments in the **Accept Filing Comments** field.
4. When you are satisfied with the filing and your comments, click . Or, click  to close the dialog box without accepting the filing.

Note: If you do not add a stamp to the PDF document you are reviewing, a message is displayed in the *Accept Filing* dialog box indicating that no annotations were added to the document.

Figure 9.3 – Example of an Accept Filing Dialog Box with the No Annotations Message Displayed

Accepting Multiple Filings

When you are reviewing an envelope that contains multiple filings, you can accept all of the filings in the envelope.

To accept an envelope that contains multiple filings:

1. In the Actions pane, click **Accept**.

The *Accept Filing* dialog box is displayed.

Figure 9.4 – Example of an Accept Filing Dialog Box

2. To review and accept multiple filings, click

Select multiple filings

Another dialog box is displayed.

Accept Filing

Application

The lead document for each filing must be viewed before the filing can be accepted or returned/rejected. All selected filings will receive the same comment.

[Return to current filing](#) [Hide Help](#)

Acknowledgement
 Acquittal
 Application

Case Number

Accept Filing Comments

Figure 9.5 – Example of an Accept Filing Dialog Box for Multiple Filings

3. Select the filings that you want to review and accept.
4. If applicable, type the case number in the **Case Number** field.
5. If applicable, type your comments in the **Accept Filing Comments** field.
6. When you are satisfied with the filing and your comments, click .

Returning a Filing

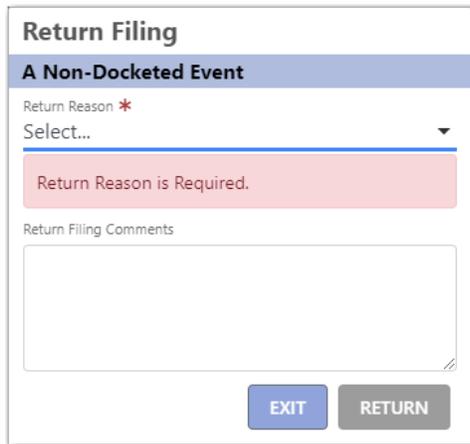
When you are reviewing a filing, you can return the filing to the filer for correction and provide a reason for the return.

Note: The terminology used in the *Return Filing* dialog box can be configured. Therefore, the dialog box that is displayed in your application may differ from what is shown in the screen shots provided in this section.

To return a filing:

1. In the Actions pane, click **Return**.

The *Return Filing* dialog box is displayed.



Return Filing

A Non-Docketed Event

Return Reason *

Select...

Return Reason is Required.

Return Filing Comments

EXIT RETURN

Figure 9.6 – Return Filing Dialog Box

2. From the **Select** drop-down list, select a reason for the return.

Note: You must select a reason for returning the filing.

3. If applicable, type any comments in the **Return Filing Comments** field.

4. When you are satisfied with the filing and your comments, click . Or, click  to close the dialog box without returning the filing.

Returning Multiple Filings

When you are reviewing multiple filings in an envelope, you can return some or all of the filings.

Note: The terminology used in the *Return Filing* dialog box can be configured. Therefore, the dialog box that is displayed in your application may differ from what is shown in the screen shots provided in this section.

To return multiple filings in an envelope:

1. In the Actions pane, click **Return**.

The *Return Filing* dialog box is displayed.

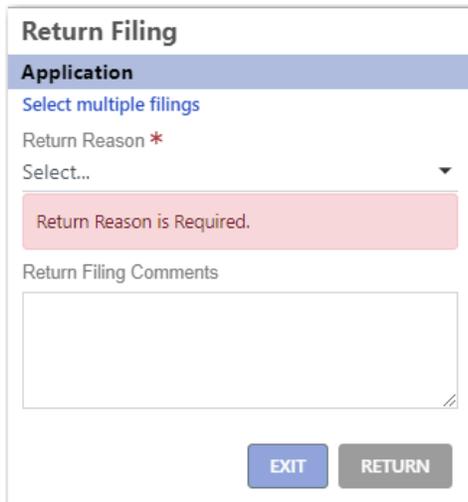


Figure 9.7 – Example of a Return Filing Dialog Box

- To review and return multiple filings, click
- Another dialog box is displayed.

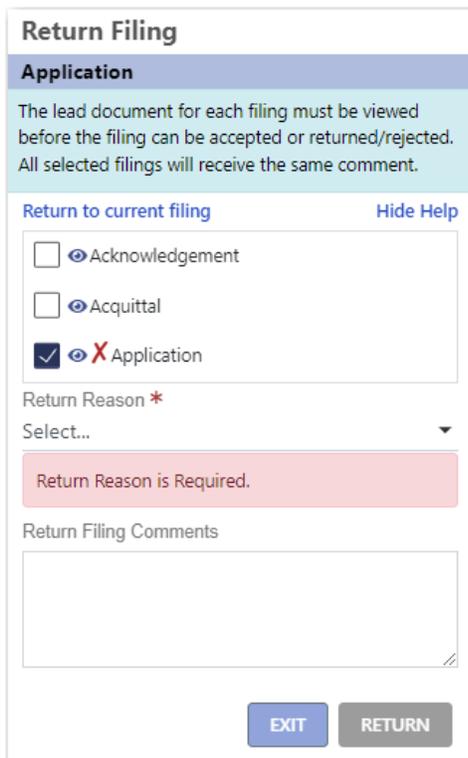


Figure 9.8 – Example of a Return Filing Dialog Box for Multiple Filings

- Select the filings that you want to return.
- From the **Return Reason** drop-down list, select a reason for returning the filings.

5. If applicable, type your comments in the **Return Filing Comments** field.

6. When you are ready, click

RETURN

Rejecting a Filing

When you are reviewing a filing, you can reject the filing and provide a reason for the rejection.

To reject a filing:

1. In the Actions pane, click **Reject**.

The *Reject Filing* dialog box is displayed.

Figure 9.9 – Reject Filing Dialog Box

2. From the **Select** drop-down list, select a reason for the rejection.

Figure 9.10 – Example of a Reject Reason Drop-Down List

Note: You must select a reason for rejecting the filing.

3. If applicable, type any comments in the **Reject Filing Comments** field.

4. When you are satisfied with the filing and your comments, click

REJECT

. Or, click

EXIT

to close the dialog box without rejecting the filing.

Failing Submission of a Filing

If any filing in an envelope is submission failed, the entire envelope is failed.

Note: This feature is configured by Tyler and may not be available in your application.

To fail submission of a filing:

1. In the Actions pane, click **Submission Fail**.

The *Fail Submission* dialog box is displayed.



Figure 9.11 – Example of a Fail Submission Dialog Box—Blank

2. From the drop-down list, select the reason for failing the submission.

Note: The reason for failing the submission is required.

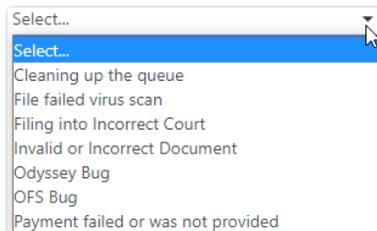


Figure 9.12 – Example of a Drop-Down List

3. If applicable, type any comments in the **Fail Submission Comments** field.

Figure 9.13 – Example of a Fail Submission Dialog Box—Fail Submission Reason Selected

4. Click  . Or, click  to close the dialog box without failing the submission.

Forwarding an Envelope

When you are reviewing an envelope, you can forward it to another reviewer.

Note: This feature is configured by Tyler and may not be available in your application.

To forward the envelope:

1. In the Actions pane, click **Forward**.

The *Forward Envelope* dialog box is displayed.

Figure 9.14 – Forward Envelope Dialog Box

2. From the **Forward Queue** drop-down list, select a queue to which to forward the envelope.

Note: You must select a queue to which to forward the envelope containing the filing.

3. Click  . Or, click  to close the dialog box without forwarding the envelope.

Manually Accepting a Filing

You can manually accept a filing if you know the case number for the filing.

Note: This feature is configured by Tyler and may not be available in your application.

To manually accept a filing:

1. In the Actions pane, click **Manual Accept**.

The *Manual Accept* dialog box is displayed.

The screenshot shows a dialog box titled "Manual Accept" with a subtitle "Abstract Of Judgment: Test Filing". Below the subtitle is a text input field labeled "Case Number *". The field is empty. A red error message box below the field reads "Case Number is Required." At the bottom of the dialog are two buttons: "EXIT" and "ACCEPT".

Figure 9.15 – Example of a Manual Accept Dialog Box—Blank

2. Type the case number in the **Case Number** field.

Note: This is a required field and must be populated here or in the Case pane.

The screenshot shows the same "Manual Accept" dialog box. The "Case Number *" field now contains the text "456". The red error message is no longer present. The "EXIT" and "ACCEPT" buttons remain at the bottom.

Figure 9.16 – Example of a Manual Accept Dialog Box with the Case Number Added

3. Click . Or, click  to close the dialog box without accepting the filing.

Sending a Filing Back to the Filer

When you are reviewing a filing, you can send it back to the filer.

To send a filing back to the filer:

1. In the Actions pane, click **Send Back to Filer**.

The *Send Back to Filer* dialog box is displayed.

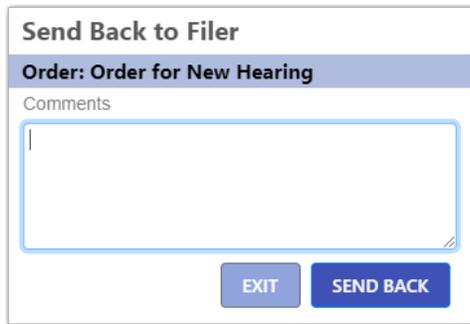


Figure 9.17 – Send Back to Filer Dialog Box

2. If applicable, type any comments in the **Comments** field.
3. When you are satisfied with your comments, click **SEND BACK**. Or, click **EXIT** to close the dialog box without sending back the filing.

Ending Review of an Envelope

You can end the review of an envelope that you plan to review at another time.

To end the review of an envelope:

1. In the Actions pane, click **End Review**.

The envelope is saved in its current state, and then the *Review Queue* page is displayed. The filing status of the envelope changes to “Under Review,” and the envelope is displayed as being unlocked.

Deferring Review of an Envelope

You can defer the review of an envelope to another date in the future.

Note: This feature is configured by Tyler and may not be available in your application.

To defer the review of an envelope:

1. On the *Review Queue* page, select the envelope to be deferred.
2. From the Actions pane on the right side, click **Defer**.

The *Defer Envelope* window is displayed.



Figure 9.18 – Defer Envelope Window

3. Type the date you want the envelope deferred to, or click  to select a date from the calendar.

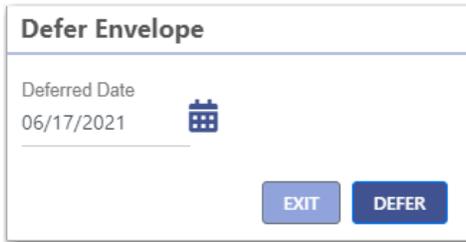


Figure 9.19 – Defer Envelope Window with a Date Selected

4. Click  .

The review of the envelope is deferred to the date you selected.

10 Review History

Topics covered in this chapter

- ◆ Filter Filings in the Review History
- ◆ Viewing Envelope Details from the Review History Page
- ◆ Viewing Service Contacts from the Review History Page
- ◆ Viewing the Action History from the Review History Page
- ◆ Viewing Refunded and Voided Fees from the Review History Page
- ◆ Filing into a Case from the Review History Page

The *Review History* page displays the envelopes for the current reviewer that were previously accepted or rejected.

Note: The default date range is 30 days prior to the current date.

The screenshot shows the 'Review History' page in the 'eFile & Serve Review Queue' application. The page title is 'Review History'. On the left, there is a 'Filters' sidebar with dropdown menus for 'Envelope #', 'Case #', 'Date Range', 'Filing Codes', 'Case Types', 'Locations', and 'Reviewers'. Below the filters are checkboxes for 'Include Complete' and 'Auto-Refresh', and buttons for 'RESET', 'APPLY', and 'EXPORT'. The main content area displays a list of five case cards. Each card has a title, an envelope number, a filing date, a filing code, a filing description, a date reviewed, and a reviewer. The first two cards are for Case # CC-22-2688 and Case # CC-22-2687, both filed on 08/01/2022. The next three cards are for Case # CC-22-207, Case # CC-22-206, and Case # CC-22-2686, all filed on 09/21/2022.

Case #	Envelope #	Filing Date	Filing Code	Filing Description	Date Reviewed	Reviewer
Case # CC-22-2688 - Patty-2022.1.0.10117 Plaintiff-2022.1.0.10117v.Danny-2022.1.0.10117 Defendant-2022.1.0.10117	190228	08/01/2022 9:54 AM CDT	Abstract Of Judgment	Fee Test Filing 1	09/21/2022 4:51 PM CDT	[Redacted]
Case # CC-22-2687 - Patty-2022.1.0.10117 Plaintiff-2022.1.0.10117v.Danny-2022.1.0.10117 Defendant-2022.1.0.10117	190229	08/01/2022 9:54 AM CDT	Abstract Of Judgment	Fee Test Filing 2	09/21/2022 4:51 PM CDT	[Redacted]
Case # CC-22-207 - John Smith, SR v.Jane Doe, MD	191987	09/21/2022 4:08 PM CDT	Abstract Of Judgment	Test Filing	09/21/2022 4:09 PM CDT	[Redacted]
Case # CC-22-206 - John Smith, SR v.Jane Doe, MD	191986	09/21/2022 3:50 PM CDT	Abstract Of Judgment	Test Filing	09/21/2022 3:53 PM CDT	[Redacted]
Case # CC-22-2686 - John Smith, SR v.Jane Doe, MD	191985	09/21/2022 3:43 PM CDT	Abstract Of Judgment	Test Filing	09/21/2022 3:47 PM CDT	[Redacted]

Figure 10.1 – Example of a Review History Page

The *Review History* page contains cards. Each card contains information about a case or an envelope that you have reviewed.

Envelope cards contain the following information:

- Envelope number
- Date and time when the envelope was filed
- Parties involved in the filing
- Filing status, for example, accepted or rejected
- Filing code

- Filing description
- Date on which the filing was reviewed
- Reviewer's name
- On subsequent filings, the judge's name (displayed in parentheses) after the judge has reviewed the envelope



Figure 10.2 – Example of an Envelope Card with the Judge’s Name Displayed

Each card in the review history also includes a check box to the left of the case number. You can select this check box to indicate that the review is complete. When you hover over the check box, the **Is Complete?** tooltip is displayed. Select the check box after you finish reviewing the envelope if you want to indicate that the review is complete.

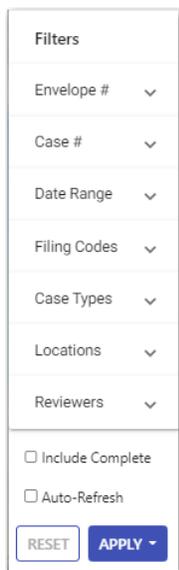
Note: Court Administrators and Firm Administrators can select the check box for completed envelopes that were reviewed by a user in their firm.

You can filter envelopes on the *Review History* page to view only the envelopes that you want to see. You can create the filters that you want from the Filters pane. Select the **Include Complete** check box to filter the envelopes for which the review is complete. This option allows you to easily remove the completed envelopes from the *Review History* page. After you apply the filters that you want, you can export the list to a Microsoft Excel spreadsheet.

At any time when the *Review History* page is displayed, select the **Auto-Refresh** check box to view a current list of the envelopes on the page. When this check box is selected, the envelopes displayed on the page refresh every five minutes. Any filters that you have selected are retained with each new refresh.

Filter Filings in the Review History

You can filter filings in the review history so that only the filings you want to see are displayed.



The screenshot shows a vertical pane titled "Filters". It contains several dropdown menus: "Envelope #", "Case #", "Date Range", "Filing Codes", "Case Types", "Locations", and "Reviewers". Below these are two checkboxes: "Include Complete" and "Auto-Refresh". At the bottom of the pane are two buttons: "RESET" and "APPLY".

Figure 10.3 – Example of a Filters Pane

You can filter filings by using one or more of the following options:

- Envelope number
- Case number
- Date range
- Filing codes
- Case types
- Locations
- Reviewers

Note: You must have “System Administrator” rights to view the Reviewers option in the Filters pane.

If you want to see the envelopes for which the reviews are complete, select the **Include Complete** check

box. Then, click



Note: You can use the Apply option to save your selected filters, reapply cleared filters, or clear the selected filters.

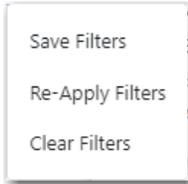


Figure 10.4 – Apply Action Menu

Note: To clear all selected filters, click  .

Note: At any time when the *Review History* page is displayed, select the **Auto-Refresh** check box to view a current list of the envelopes on the page. When this check box is selected, the envelopes displayed on the page refresh every five minutes. Any filters that you have selected are retained with each new refresh.

Filtering Review History Filings by the Envelope Number

If you know the envelope number for the filing in the review history that you want to view, you can search for the specified envelope.

To search for a filing by the envelope number:

1. Sign in to the eFile & Serve Review Queue.
The *Review Queue* page is displayed.
2. From the menu at the top left, click **Review History**.
The *Review History* page is displayed.

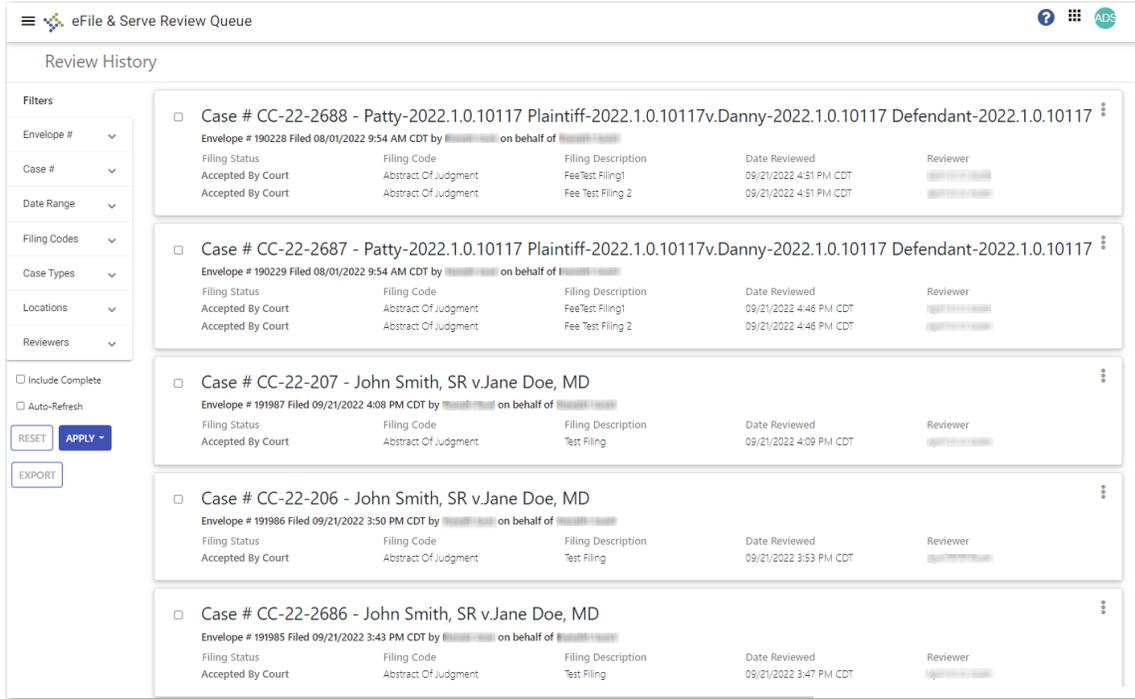


Figure 10.5 – Example of a Review History Page

- In the Filters pane, expand the Envelope # pane. Then, type the number of the envelope that you want to view.

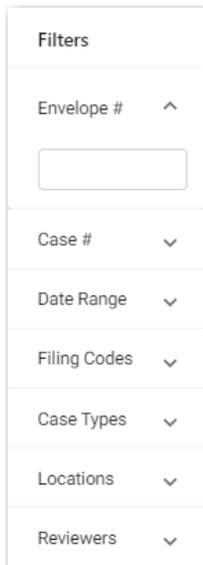


Figure 10.6 – Envelope # Pane in the Filters Pane

- If you want to see the envelopes for which the reviews are complete, select the **Include Complete**

check box. Then, click .

Note: You can use the Apply option to save your selected filters, reapply cleared filters, or clear the selected filters.

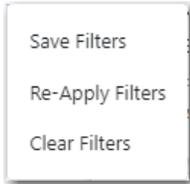


Figure 10.7 – Apply Action Menu

The envelopes that you selected in your filter are displayed in the review history.

Note: To clear all selected filters, click  .

Filtering Review History Filings by the Case Number

If you know the case number for the filing in the review history that you want to view, you can search for the specified case.

To search for a filing by the case number:

1. Sign in to the eFile & Serve Review Queue.
 - The *Review Queue* page is displayed.
2. From the menu at the top left, click **Review History**.
 - The *Review History* page is displayed.

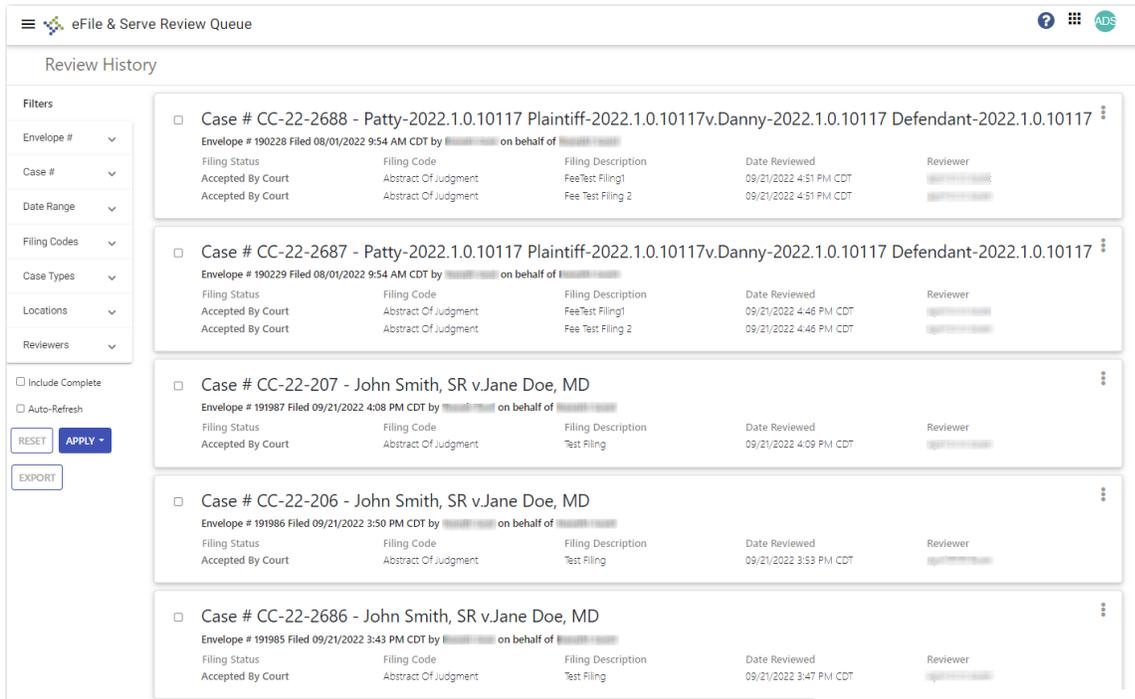


Figure 10.8 – Example of a Review History Page

3. In the Filters pane, expand the Case # pane. Then, type the number of the case that you want to view.

Figure 10.9 – Case# Pane in the Filters Pane

4. If you want to see the cases for which the reviews are complete, select the **Include Complete** check box. Then, click .

Note: You can use the Apply option to save your selected filters, reapply cleared filters, or clear the selected filters.

Figure 10.10 – Apply Action Menu

The cases that you selected in your filter are displayed in the review history.

Note: To clear all selected filters, click .

Filtering Review History Filings by Date Range

If you know the date range for the filing in the review history that you want to view, you can search for the filing by that date range.

To search for a filing by the date range:

1. Sign in to the eFile & Serve Review Queue.
The *Review Queue* page is displayed.
2. From the menu at the top left, click **Review History**.
The *Review History* page is displayed.

The screenshot shows the 'eFile & Serve Review Queue' interface. On the left is a 'Filters' pane with dropdown menus for Envelope #, Case #, Date Range, Filing Codes, Case Types, Locations, and Reviewers. Below these are checkboxes for 'Include Complete' and 'Auto-Refresh', along with 'RESET', 'APPLY', and 'EXPORT' buttons. The main area displays a list of review history items, each with a case number and a table of details:

Envelope #	Filing Status	Filing Code	Filing Description	Date Reviewed	Reviewer
190228	Filed	08/01/2022 9:54 AM CDT	by [redacted] on behalf of [redacted]		
	Accepted By Court	Abstract Of Judgment	Fee Test Filing 1	09/21/2022 4:51 PM CDT	[redacted]
	Accepted By Court	Abstract Of Judgment	Fee Test Filing 2	09/21/2022 4:51 PM CDT	[redacted]
190229	Filed	08/01/2022 9:54 AM CDT	by [redacted] on behalf of [redacted]		
	Accepted By Court	Abstract Of Judgment	Fee Test Filing 1	09/21/2022 4:46 PM CDT	[redacted]
	Accepted By Court	Abstract Of Judgment	Fee Test Filing 2	09/21/2022 4:46 PM CDT	[redacted]
191987	Filed	09/21/2022 4:08 PM CDT	by [redacted] on behalf of [redacted]		
	Accepted By Court	Abstract Of Judgment	Test Filing	09/21/2022 4:09 PM CDT	[redacted]
191986	Filed	09/21/2022 3:50 PM CDT	by [redacted] on behalf of [redacted]		
	Accepted By Court	Abstract Of Judgment	Test Filing	09/21/2022 3:53 PM CDT	[redacted]
191985	Filed	09/21/2022 3:43 PM CDT	by [redacted] on behalf of [redacted]		
	Accepted By Court	Abstract Of Judgment	Test Filing	09/21/2022 3:47 PM CDT	[redacted]

Figure 10.11 – Example of a Review History Page

3. In the Filters pane, in the Date Range pane, select the dates for which you want to view the filings.

This image shows a close-up of the 'Filters' pane. The 'Date Range' section is expanded, showing 'Start Date' and 'End Date' fields, each with a calendar icon to its right. Other filter categories like 'Envelope #', 'Case #', 'Filing Codes', 'Case Types', 'Locations', and 'Reviewers' are visible but collapsed.

Figure 10.12 – Filters Pane with Date Range

4. Either click  , or type the dates in the **Start Date** and **End Date** fields.

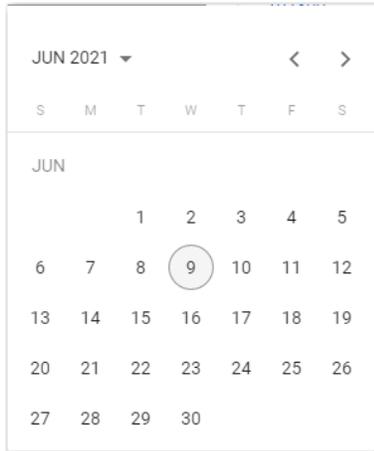


Figure 10.13 – Example of a Calendar

- If you want to see the envelopes for which the reviews are complete, select the **Include Complete** check box. Then, click .

Note: You can use the Apply option to save your selected filters, reapply cleared filters, or clear the selected filters.

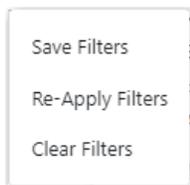


Figure 10.14 – Apply Action Menu

The envelopes that you selected in your filter are displayed in the review history.

Note: To clear all selected filters, click .

Filtering Review History Filings by Filing Codes

You can filter the filings that you want to view by the filing codes.

To filter filings by the filing code:

- Sign in to the eFile & Serve Review Queue.
The *Review Queue* page is displayed.
- From the menu at the top left, click **Review History**.
The *Review History* page is displayed.

The screenshot shows the 'eFile & Serve Review Queue' interface. On the left is a 'Filters' pane with dropdown menus for Envelope #, Case #, Date Range, Filing Codes, Case Types, Locations, and Reviewers. Below these are checkboxes for 'Include Complete' and 'Auto-Refresh', along with 'RESET', 'APPLY', and 'EXPORT' buttons. The main area displays a list of review items, each with a checkbox and a table of details.

Case #	Envelope #	Filing Status	Filing Code	Filing Description	Date Reviewed	Reviewer
CC-22-2688 - Patty-2022.1.0.10117 Plaintiff-2022.1.0.10117v.Danny-2022.1.0.10117 Defendant-2022.1.0.10117	190228	Filed	08/01/2022 9:54 AM CDT	by [redacted] on behalf of [redacted]		
		Accepted By Court	Abstract Of Judgment	Fee Test Filing 1	09/21/2022 4:51 PM CDT	[redacted]
		Accepted By Court	Abstract Of Judgment	Fee Test Filing 2	09/21/2022 4:51 PM CDT	[redacted]
CC-22-2687 - Patty-2022.1.0.10117 Plaintiff-2022.1.0.10117v.Danny-2022.1.0.10117 Defendant-2022.1.0.10117	190229	Filed	08/01/2022 9:54 AM CDT	by [redacted] on behalf of [redacted]		
		Accepted By Court	Abstract Of Judgment	Fee Test Filing 1	09/21/2022 4:46 PM CDT	[redacted]
		Accepted By Court	Abstract Of Judgment	Fee Test Filing 2	09/21/2022 4:46 PM CDT	[redacted]
CC-22-207 - John Smith, SR v.Jane Doe, MD	191987	Filed	09/21/2022 4:08 PM CDT	by [redacted] on behalf of [redacted]		
		Accepted By Court	Abstract Of Judgment	Test Filing	09/21/2022 4:09 PM CDT	[redacted]
CC-22-206 - John Smith, SR v.Jane Doe, MD	191986	Filed	09/21/2022 3:50 PM CDT	by [redacted] on behalf of [redacted]		
		Accepted By Court	Abstract Of Judgment	Test Filing	09/21/2022 3:53 PM CDT	[redacted]
CC-22-2686 - John Smith, SR v.Jane Doe, MD	191985	Filed	09/21/2022 3:43 PM CDT	by [redacted] on behalf of [redacted]		
		Accepted By Court	Abstract Of Judgment	Test Filing	09/21/2022 3:47 PM CDT	[redacted]

Figure 10.15 – Example of a Review History Page

- In the Filters pane, expand the Filing Codes pane. Then, to filter your search, type the first few letters of the filing code that contains the filings that you want to view. Or, select the check box for the filing code that contains the filings that you want to view.

Note: If you filter your search by typing the first few letters of the filing code you want, all of the filing codes that match your search will be displayed. Then, select the check box for the filing code that you want.

Figure 10.16 – Filing Codes Pane in the Filters Pane

4. If you want to see the filing codes for which the reviews are complete, select the **Include Complete** check box. Then, click .

Note: You can use the Apply option to save your selected filters, reapply cleared filters, or clear the selected filters.

Figure 10.17 – Apply Action Menu

The filing codes that you selected in your filter are displayed in the review history.

Note: To clear all selected filters, click .

Filtering Review History Filings by Case Types

If you know the case type or the case type category for the filing in the review history that you want to view, you can search for it.

To search for a filing by the case type or case type category:

1. Sign in to the eFile & Serve Review Queue.
The *Review Queue* page is displayed.
2. From the menu at the top left, click **Review History**.
The *Review History* page is displayed.

The screenshot shows the 'eFile & Serve Review Queue' interface. At the top, there is a navigation bar with a menu icon, the title 'eFile & Serve Review Queue', and a user profile icon labeled 'ADS'. Below the navigation bar is the 'Review History' section. On the left side, there is a 'Filters' pane with several dropdown menus: 'Envelope #', 'Case #', 'Date Range', 'Filing Codes', 'Case Types', 'Locations', and 'Reviewers'. Below these are checkboxes for 'Include Complete' and 'Auto-Refresh', along with 'RESET' and 'APPLY' buttons, and an 'EXPORT' button. The main area displays a list of cases, each with a checkbox and a vertical ellipsis menu icon. The cases shown are:

- Case # CC-22-2688 - Patty-2022.1.0.10117 Plaintiff-2022.1.0.10117v.Danny-2022.1.0.10117 Defendant-2022.1.0.10117**
Envelope # 190228 Filed 08/01/2022 9:54 AM CDT by [redacted] on behalf of [redacted]
Filing Status: Accepted By Court | Filing Code: Abstract Of Judgment | Filing Description: Fee Test Filing 1 | Date Reviewed: 09/21/2022 4:51 PM CDT | Reviewer: [redacted]
Accepted By Court: Abstract Of Judgment | Fee Test Filing 2 | Date Reviewed: 09/21/2022 4:51 PM CDT | Reviewer: [redacted]
- Case # CC-22-2687 - Patty-2022.1.0.10117 Plaintiff-2022.1.0.10117v.Danny-2022.1.0.10117 Defendant-2022.1.0.10117**
Envelope # 190229 Filed 08/01/2022 9:54 AM CDT by [redacted] on behalf of [redacted]
Filing Status: Accepted By Court | Filing Code: Abstract Of Judgment | Filing Description: Fee Test Filing 1 | Date Reviewed: 09/21/2022 4:46 PM CDT | Reviewer: [redacted]
Accepted By Court: Abstract Of Judgment | Fee Test Filing 2 | Date Reviewed: 09/21/2022 4:46 PM CDT | Reviewer: [redacted]
- Case # CC-22-207 - John Smith, SR v.Jane Doe, MD**
Envelope # 191987 Filed 09/21/2022 4:08 PM CDT by [redacted] on behalf of [redacted]
Filing Status: Accepted By Court | Filing Code: Abstract Of Judgment | Filing Description: Test Filing | Date Reviewed: 09/21/2022 4:09 PM CDT | Reviewer: [redacted]
- Case # CC-22-206 - John Smith, SR v.Jane Doe, MD**
Envelope # 191986 Filed 09/21/2022 3:50 PM CDT by [redacted] on behalf of [redacted]
Filing Status: Accepted By Court | Filing Code: Abstract Of Judgment | Filing Description: Test Filing | Date Reviewed: 09/21/2022 3:53 PM CDT | Reviewer: [redacted]
- Case # CC-22-2686 - John Smith, SR v.Jane Doe, MD**
Envelope # 191985 Filed 09/21/2022 3:43 PM CDT by [redacted] on behalf of [redacted]
Filing Status: Accepted By Court | Filing Code: Abstract Of Judgment | Filing Description: Test Filing | Date Reviewed: 09/21/2022 3:47 PM CDT | Reviewer: [redacted]

Figure 10.18 – Example of a Review History Page

- In the Filters pane, expand the Case Types pane. Then, to filter your search, type the first few letters of the case type that contains the filings that you want to view. Or, select the check box for the case type that contains the filings that you want to view.

Note: If you filter your search by typing the first few letters of the case type you want, all of the case types that match your search will be displayed. You can then select the check box for the case type that you want.

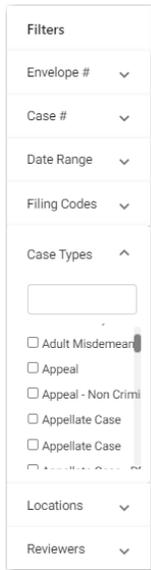


Figure 10.19 – Case Types Pane in the Filters Pane

- If you want to see the case types for which the reviews are complete, select the **Include Complete** check box. Then, click  .

Note: You can use the Apply option to save your selected filters, reapply cleared filters, or clear the selected filters.

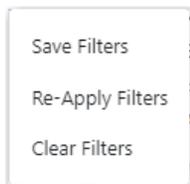


Figure 10.20 – Apply Action Menu

The case types that you selected in your filter are displayed in the review history.

Note: To clear all selected filters, click  .

Filtering Review History Filings by Locations

You can filter the filings that you want to view by the locations of the filings.

To filter filings by locations:

- Sign in to the eFile & Serve Review Queue.
The *Review Queue* page is displayed.
- From the menu at the top left, click **Review History**.
The *Review History* page is displayed.

The screenshot shows the 'eFile & Serve Review Queue' interface. On the left is a 'Filters' pane with dropdown menus for Envelope #, Case #, Date Range, Filing Codes, Case Types, Locations, and Reviewers. Below these are checkboxes for 'Include Complete' and 'Auto-Refresh', along with 'RESET', 'APPLY', and 'EXPORT' buttons. The main area displays a 'Review History' table with five case entries. Each entry includes a case number, envelope number, filing date, filing code, filing description, date reviewed, and reviewer.

Case #	Envelope #	Filing Status	Filing Code	Filing Description	Date Reviewed	Reviewer
Case # CC-22-2688 - Patty-2022.1.0.10117 Plaintiff-2022.1.0.10117v.Danny-2022.1.0.10117 Defendant-2022.1.0.10117	190228	Filed	Abstract Of Judgment	Fee Test Filing 1	09/21/2022 4:51 PM CDT	[Redacted]
		Accepted By Court	Abstract Of Judgment	Fee Test Filing 2	09/21/2022 4:51 PM CDT	[Redacted]
Case # CC-22-2687 - Patty-2022.1.0.10117 Plaintiff-2022.1.0.10117v.Danny-2022.1.0.10117 Defendant-2022.1.0.10117	190229	Filed	Abstract Of Judgment	Fee Test Filing 1	09/21/2022 4:46 PM CDT	[Redacted]
		Accepted By Court	Abstract Of Judgment	Fee Test Filing 2	09/21/2022 4:46 PM CDT	[Redacted]
Case # CC-22-207 - John Smith, SR v.Jane Doe, MD	191987	Filed	Abstract Of Judgment	Test Filing	09/21/2022 4:09 PM CDT	[Redacted]
Case # CC-22-206 - John Smith, SR v.Jane Doe, MD	191986	Filed	Abstract Of Judgment	Test Filing	09/21/2022 3:53 PM CDT	[Redacted]
Case # CC-22-2686 - John Smith, SR v.Jane Doe, MD	191985	Filed	Abstract Of Judgment	Test Filing	09/21/2022 3:47 PM CDT	[Redacted]

Figure 10.21 – Example of a Review History Page

- In the Filters pane, expand the Locations pane. Then, to filter your search, type the first few letters of the location that contains the filings that you want to view. Or, select the check box for the location that contains the filings that you want to view.

Note: If you filter your search by typing the first few letters of the location you want, all of the locations that match your search will be displayed. Then, select the check box for the location that you want.

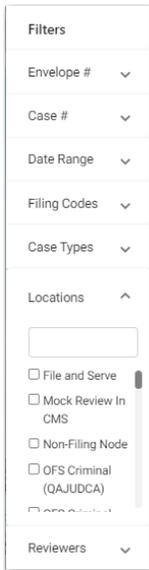


Figure 10.22 – Locations Pane in the Filters Pane

4. If you want to see the locations for which the reviews are complete, select the **Include Complete** check box. Then, click  .

Note: You can use the Apply option to save your selected filters, reapply cleared filters, or clear the selected filters.

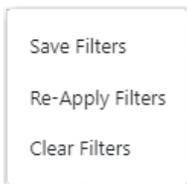


Figure 10.23 – Apply Action Menu

The locations that you selected in your filter are displayed in the review history.

Note: To clear all selected filters, click  .

Filtering Review History Filings by Reviewers

You can filter the filings that you want to view by the reviewers who have reviewed the filings.

Note: You must have “System Administrator” rights to perform this procedure.

To filter filings by reviewers:

1. Sign in to the eFile & Serve Review Queue.
The *Review Queue* page is displayed.
2. From the menu at the top left, click **Review History**.

The *Review History* page is displayed.

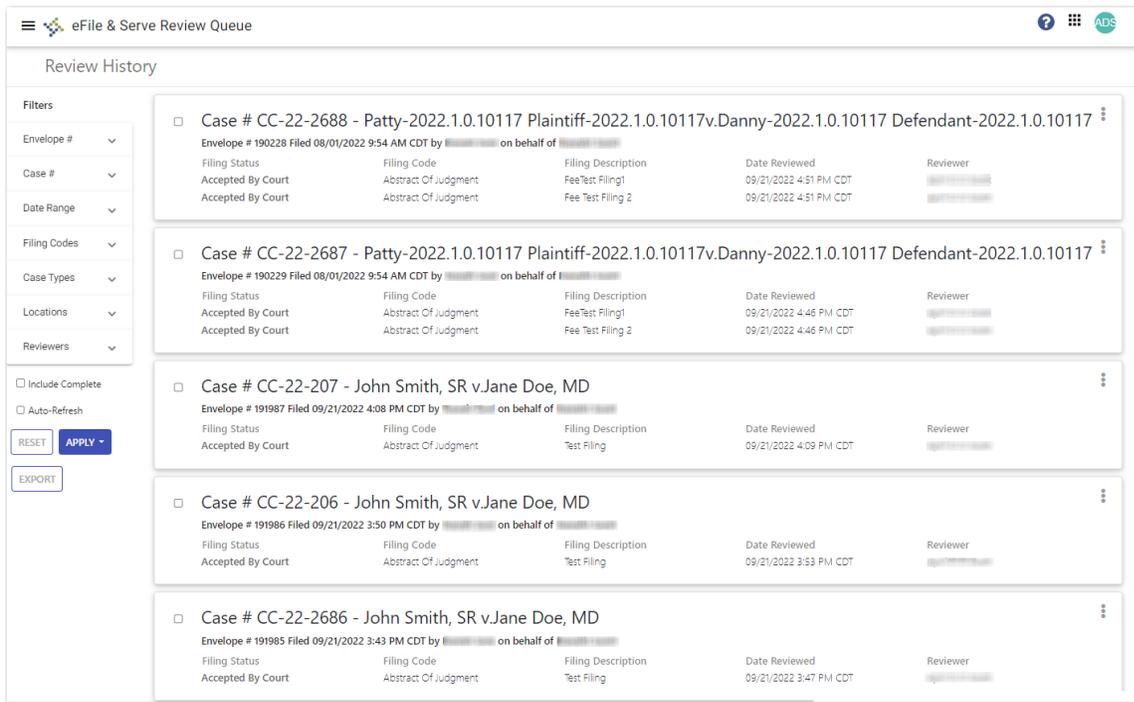


Figure 10.24 – Example of a Review History Page

3. In the Filters pane, expand the Reviewers pane. Then, to filter your search, type the first few letters of the name of the reviewer whose filings you want to view. Or, select the check box for the reviewer

whose filings you want to view. Click **Check All** if you want to see the filings for all of the reviewers in the list.

Note: By default, the Reviewers pane filters filings to the user who is currently signed in to the eFile & Serve Review Queue. To add other reviewers, filter your search by typing the first few letters of the name of the specified reviewer. All of the reviewers who match your search will be displayed. Then, select the check box for the reviewer whom you want.

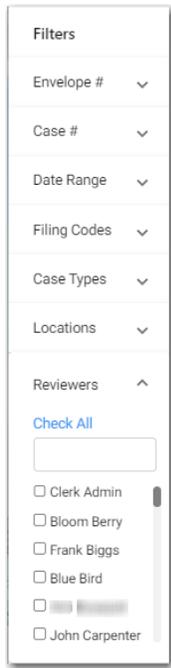


Figure 10.25 – Reviewers Pane in the Filters Pane

4. If you want to see the filings that a specified reviewer has completed, select the **Include Complete**

check box. Then, click

APPLY ▾

Note: You can use the Apply option to save your selected filters, reapply cleared filters, or clear the selected filters.

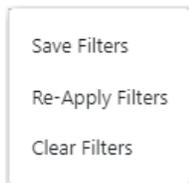


Figure 10.26 – Apply Action Menu

The filings for the reviewer whom you selected in your filter are displayed in the review history.

Note: To clear all selected filters, click

RESET

Viewing Envelope Details from the Review History Page

You can view the details of an envelope from the *Review History* page.

To view the envelope details:

1. On the *Review History* page, locate the card for which you want to view the envelope details.



2. Click , and then click **Envelope Details**.

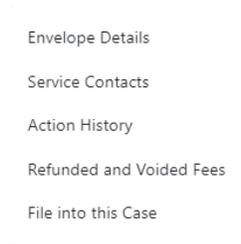


Figure 10.27 – Example of an Action Menu

The *Envelope Detail* page is displayed.

Case # CV-2024-029392 - Envelope # 236860
[PRINT](#) [CLOSE](#)

Case

Case Number CV-2024-029392	Description John Doe vs Jane Smith vs John Public	Location OFS Mod/CMS	Category CIV
Case Type Breach Of Contract	Status Open	Filed Date 04/17/2024 1:09 AM CDT	Lower Court/Agency #
Lower Court/Agency Case #	Judge Mock Judge Code		

Envelope

Submit Date 07/15/2024 2:48 PM CDT	Docket Date 07/15/2024 2:48 PM CDT	Hearing Date 07/15/2024 11:00 AM - 12:00 PM CDT
Filing Attorney Andrea [redacted]	Filed By [redacted]	
Filing Source OFS EFSP Filing Interface	Firm Name [redacted] and Associates	Firm Address 5101 Tennyson Parkway, Suite 5000 Plano, Texas 75024
Firm Phone 972-913-3770	Filer Email [redacted]@lyertech.com	Filer Type

Existing Parties 3 Parties

Party Type	Party Name	Lead Attorney
Plaintiff	John W. Doe	UA-Attorney Valid
Defendant	Jane Q Smith	Jane Q Smith
Defendant	John C Public	

Filings 1 Filing(s)

Motions	Filing Type	Reference Number	Filing Description
Status Under Review	EFile		
Filing Comments	Filing Country Copies	Filing Preliminary Notifications	Review Date
Motion Type Motion Type - Motion			

Component	Document Name	Description	Security	Download Version	Document Size
Lead Document	Redaction test.pdf	Motions	Public (T)	Original	42.26 KB

Figure 10.28 – Example of an Envelope Detail Page

3. Click  if you want to print the envelope details. Then, click  to return to the *Review History* page.

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January 2025

ESO-FS-200-4987 v.3

Viewing Service Contacts from the Review History Page

You can view the service contacts for a specified envelope from the *Review History* page.

To view the service contacts:

1. On the *Review History* page, locate the card for which you want to view the service contacts.

2. Click  , and then select **Service Contacts** from the menu.

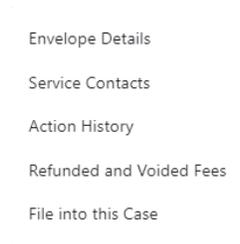


Figure 10.29 – Example of an Action Menu

The *Service Contacts* window for the specified envelope is displayed.

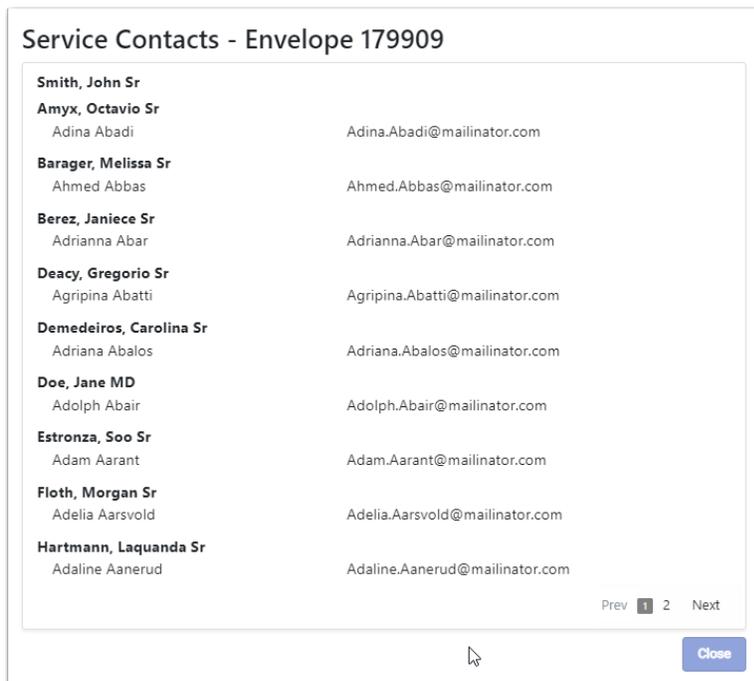


Figure 10.30 – Example of a Service Contacts Window

3. If you want to take further action on a service contact that is displayed, click  to the right of that service contact.

An action menu is displayed.

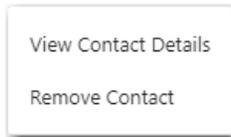


Figure 10.31 – Service Contact Action Menu

4. Click **Remove Contact** to remove the service contact from the envelope, or click **View Contact Details** for more information about the specified service contact.

Service Contact Details

First Name Portland	Middle Name	Last Name Oregon
Email portlandoregon@tylertech.com	Administrative Email(s)	Firm Name
Phone Number		
Country United States of America		
Address Line 1	Address Line 2	
City	State	Zip Code
<input checked="" type="checkbox"/> Make this contact also Public		
Created By		
Firm Name:	[Redacted] Firm	
Phone:	phone	
Address:	1 City, Texas 23323	

Close

Figure 10.32 – Example of a Service Contact Details Window

Viewing the Action History from the Review History Page

You can view the action history for a specified envelope from the *Review History* page.

To view the action history:

1. On the *Review History* page, locate the card for which you want to view the action history.

2. Click  , and then select **Action History** from the action menu.

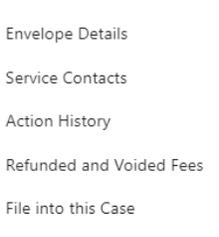


Figure 10.33 – Example of an Action Menu

The *Envelope Action History* window for the specified envelope is displayed.

Envelope Action History				
Envelope #235102				
User	Action	Filing Code	Date/Time	Queue
Automation Tylertest	Submitted		06/07/2024 9:52 PM CDT	Automation Queue
Automation Tylertest	Selected		06/07/2024 9:52 PM CDT	Automation Queue
Automation Tylertest	Selected		06/07/2024 9:52 PM CDT	Automation Queue
Automation Tylertest	Unlocked		06/07/2024 9:52 PM CDT	
Automation Tylertest	EndReview		06/07/2024 9:52 PM CDT	
[REDACTED]	Selected		06/10/2024 2:32 PM CDT	[REDACTED] Queue
[REDACTED]	Selected		06/10/2024 2:32 PM CDT	[REDACTED] Queue
[REDACTED]	Selected		06/10/2024 2:34 PM CDT	[REDACTED] Queue
[REDACTED]	Selected		06/10/2024 2:34 PM CDT	[REDACTED] Queue
[REDACTED]	SaveAnnotation-323951		06/10/2024 2:34 PM CDT	
[REDACTED]	Unlocked		06/10/2024 2:34 PM CDT	
[REDACTED]	EndReview		06/10/2024 2:34 PM CDT	

Figure 10.34 – Example of an Envelope Action History Window

Note: The Audit Log button is disabled and reads “No Audit Log” in the *Envelope Action History* window until information has been changed in the envelope during review.

For information about the audit log, refer to [Audit Log](#), page 52.

Viewing Refunded and Voided Fees from the Review History Page

You can view, add, or record refunded and voided fees for envelopes that have been accepted by the court and have fees associated with them. You can take these actions on envelopes that are displayed on the *Review History* page.

To view the refunded and voided fees:

1. Locate the envelope to which you want to add a refunded or voided fee record.

Note: The envelope must already have been accepted by the court, and the payment type must not be a waiver.

2. Click , and then select **Refunded and Voided Fees** from the action menu.

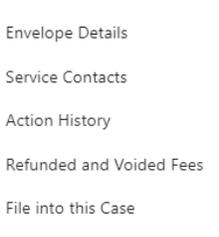


Figure 10.35 – Example of an Action Menu

The *Refunded and Voided Fees* dialog box is displayed.

Figure 10.36 – Example of a Refunded and Voided Fees Dialog Box

3. Type a date in the **Refund Date** field, or select a date from the calendar.
4. Type the amount to be refunded in the **Amount Refunded** field.
5. Select the reason for the refund or void from the **Refund Reason** drop-down list.

Figure 10.37 – Example of a Refund Reason Drop-Down List

6. If you have any comments to add, type them in the **Refund Comments** field.

7. Click **Save**.

Refunded and Voided Fees

Envelope # 193422

Refund Date *
01/21/2023

Amount Refunded *
10.00

Refund Reason *
Mail Service Error

Refund Comments
Refund expected soon.

CANCEL SAVE

Figure 10.38 – Example of a Refunded and Voided Fees Dialog Box with Information Added

Note: You can only enter information in the *Refunded and Voided Fees* dialog box. The information that you enter in the dialog box does not affect the fees that are attached to the envelope.

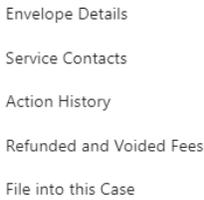
Filing into a Case from the Review History Page

You can file into a case from the *Review History* page.

Note: The case that you file into must be an existing case in the eFile & Serve application.

To file into a case from the *Review History* page:

1. Click , and then click **File into this Case**.



- Envelope Details
- Service Contacts
- Action History
- Refunded and Voided Fees
- File into this Case

Figure 10.39 – Example of an Action Menu

The *Landing* page of the eFile & Serve application is displayed in a separate tab in your browser.

Note: You must sign in to eFile & Serve to file in to the specified case.

2. Sign in to eFile & Serve with your credentials.

The application opens on the *Case Information* page of the specified case.

3. Complete the required fields on each page of the case filing, as applicable.
4. Return to the eFile & Serve Review Queue when you are done.

11 Envelope Lookup

Topics covered in this chapter

- ◆ Viewing Envelope Details from the Envelope Lookup Page
- ◆ Viewing Service Contacts from the Envelope Lookup Page
- ◆ Viewing the Action History from the Envelope Lookup Page
- ◆ Viewing Refunded and Voided Fees from the Envelope Lookup Page

The *Envelope Lookup* page displays all of the envelopes that have been processed in the eFile & Serve Review Queue, based on the filter that you select. The envelope information is displayed on cards.

The screenshot shows the 'eFile & Serve Review Queue' interface. The main heading is 'Envelope Lookup'. On the left, there are filters: 'All Filings' (selected), 'My Firm's Filings', and 'My Filings Only'. Below the filters are dropdown menus for 'Envelope #', 'Case #', 'Date Range', 'Status', and 'Locations'. There are also 'RESET', 'APPLY', and 'EXPORT' buttons. The main area displays a list of envelope cards. Each card shows the envelope number, filing status, filing code, filing description, date reviewed, and reviewer. The cards are: 192107 (Submitted), CC-22-214 (Accepted by Court), 192105 (Under Review), 192104 (Under Review), 192103 (Under Review), and 192102 (Under Review). At the bottom right, there is a pagination control showing 'Items per page: 25' and '1 - 25 of 611'.

Figure 11.1 – Example of an Envelope Lookup Page

Envelopes for proposed orders also include the judge's name on the card (displayed in parentheses).

The screenshot shows a single envelope card for 'Case # 22SC001708 - Baker vs. Meade (Cooper, Randall)'. The card displays the following information: 'Envelope # 321298 Filed 06/28/2022 4:41 PM CDT by Brian Harvey on behalf of Wendy Mory Aach'. Below this, there is a table with columns: 'Filing Status', 'Filing Code', 'Filing Description', 'Date Reviewed', and 'Reviewer'. The 'Filing Status' is 'Under Review', the 'Filing Code' is 'Superior Court eFiling Event - Service by Mail', and the 'Filing Description' is 'Anna Doc test on Q41 v 2022.9.3.753'. There are also 'Date Reviewed' and 'Reviewer' columns, which are currently empty.

Figure 11.2 – Example of an Envelope Card with the Judge's Name Displayed

All envelopes are displayed by date with the most recent envelopes displayed first. However, you can filter the envelopes to display all filings, only your firm's filings, or only your own filings.

Note: The default date range is 60 days. Type a specific date range if you want to change the default value.

You can also filter the filings by using one or more of the following filters:

- Envelope number
- Case number
- Date range
- Status of the filing
- Locations

The status filter lists the status of filings in the Envelope Lookup list.

After you apply the filters that you want, you can export the list to a Microsoft Excel spreadsheet.

Viewing Envelope Details from the Envelope Lookup Page

You can view the details of an envelope from the *Envelope Lookup* page.

To view the envelope details:

1. On the *Envelope Lookup* page, locate the card for which you want to view the envelope details.



2. Click , and then click **Envelope Details** from the action menu.

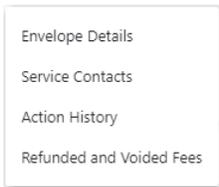


Figure 11.3 – Example of an Action Menu

The *Envelope Detail* page is displayed.

Case # CV-2024-029392 - Envelope # 236860 PRINT CLOSE

Case

Case Number CV-2024-029392	Description John Doe vs Jane Smith vs John Public	Location OFS MockCMS	Category Civil
Case Type Breach Of Contract	Status Open	Filed Date 04/17/2024 1:09 AM CDT	Lower Court/Agency #
Lower Court/Agency Case #	Judge Mock Judge Code		

Envelope

Submit Date 07/15/2024 2:48 PM CDT	Docket Date 07/15/2024 2:48 PM CDT	Hearing Date 07/15/2024 11:00 AM - 12:00 PM CDT
Filing Attorney Andrea [redacted]	Filed By [redacted]	
Filing Source OFS EFSP Filing Interface	Firm Name [redacted] and Associates	Firm Address 5101 Terryson Parkway, Suite 5000 Plano, Texas 75024
Firm Phone 972-913-3770	Filer Email [redacted]@terrytech.com	Filer Type

Existing Parties 3 Parties

Party Type	Party Name	Lead Attorney
Plaintiff	John W. Doe	UA-Attorney Valid
Defendant	Jane Q Smith	Jane Q Smith
Defendant	John C Public	

Filings 1 Filing(s)

Motions	Filing Type	Reference Number	Filing Description
Status Under Review	EFile		
Filing Comments	Filing Courtesy Copies	Filing Preliminary Notifications	Review Date
Motion Type Motion Type - Motion			

Documents

Component	Document Name	Description	Security	Download Version	Document Size
Lead Document	Redaction test.pdf	Motions	Public (T)	Original	42.26 KB

Figure 11.4 – Example of an Envelope Detail Page

3. Click PRINT if you want to print the envelope details. Then, click CLOSE to return to the *Review History* page.

Viewing Service Contacts from the Envelope Lookup Page

You can view the service contacts for a specified envelope from the *Envelope Lookup* page.

To view the service contacts for a specified envelope:

1. On the *Envelope Lookup* page, locate the card for which you want to view the service contacts.

2. Click , and then select **Service Contacts** from the action menu.

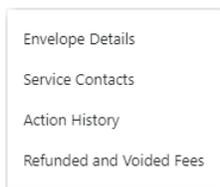


Figure 11.5 – Example of an Action Menu

The *Service Contacts* window for the specified envelope is displayed.

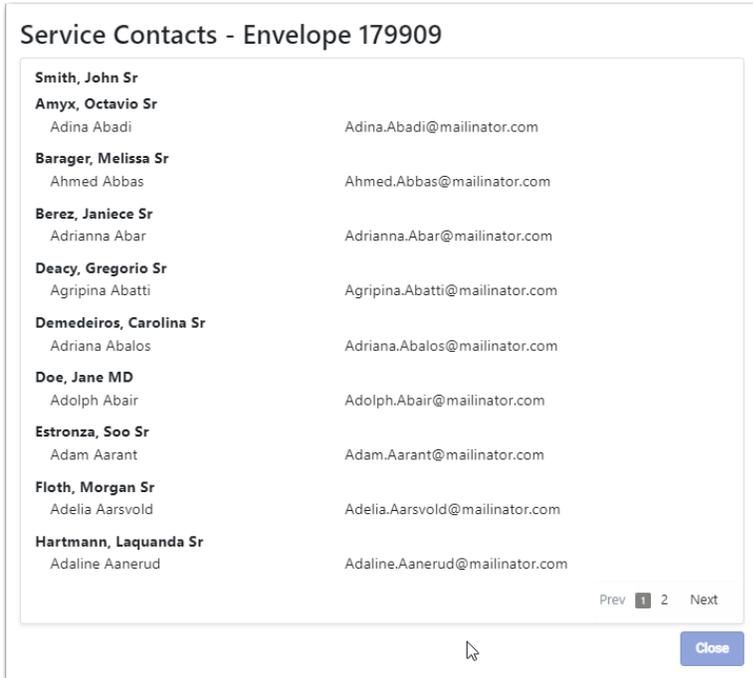


Figure 11.6 – Example of a Service Contacts Window

3. If you want to take further action on a service contact that is displayed, click  to the right of that service contact.

An action menu is displayed.

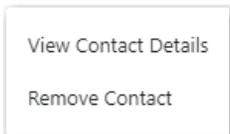


Figure 11.7 – Example of a Service Contact Action Menu

4. Click **Remove Contact** to remove the service contact from the envelope, or click **View Contact Details** for more information about the specified service contact.

Service Contact Details

First Name Portland	Middle Name	Last Name Oregon
Email portlandoregon@tylertech.com	Administrative Email(s)	Firm Name
Phone Number		
Country United States of America		
Address Line 1	Address Line 2	
City	State	Zip Code
<input checked="" type="checkbox"/> Make this contact also Public		
Created By		
Firm Name:	[Redacted] Firm	
Phone:	phone	
Address:	1 City, Texas 23323	

Figure 11.8 – Example of a Service Contact Details Window

Viewing the Action History from the Envelope Lookup Page

You can view the action history for a specified envelope from the *Envelope Lookup* page.

To view the action history for a specified envelope:

1. On the *Envelope Lookup* page, locate the card for which you want to view the action history.

2. Click  , and then select **Action History** from the action menu.

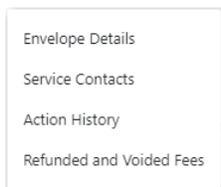


Figure 11.9 – Example of an Action Menu

The *Envelope Action History* window for the specified envelope is displayed.

Envelope Action History				
Envelope #235102				
User	Action	Filing Code	Date/Time	Queue
Automation Tylertest	Submitted		06/07/2024 9:52 PM CDT	Automation Queue
Automation Tylertest	Selected		06/07/2024 9:52 PM CDT	Automation Queue
Automation Tylertest	Selected		06/07/2024 9:52 PM CDT	Automation Queue
Automation Tylertest	Unlocked		06/07/2024 9:52 PM CDT	
Automation Tylertest	EndReview		06/07/2024 9:52 PM CDT	
[REDACTED]	Selected		06/10/2024 2:32 PM CDT	[REDACTED] Queue
[REDACTED]	Selected		06/10/2024 2:32 PM CDT	[REDACTED] Queue
[REDACTED]	Selected		06/10/2024 2:34 PM CDT	[REDACTED] Queue
[REDACTED]	Selected		06/10/2024 2:34 PM CDT	[REDACTED] Queue
[REDACTED]	SaveAnnotation-323951		06/10/2024 2:34 PM CDT	
[REDACTED]	Unlocked		06/10/2024 2:34 PM CDT	
[REDACTED]	EndReview		06/10/2024 2:34 PM CDT	

Figure 11.10 – Example of an Envelope Action History Window

Note: The Audit Log button is disabled and reads “No Audit Log” in the *Envelope Action History* window until information has been changed in the envelope during review.

For information about the audit log, refer to [Audit Log](#), page 52.

Viewing Refunded and Voided Fees from the Envelope Lookup Page

You can view, add, or record refunded and voided fees for envelopes that have been accepted by the court and have fees associated with them. You can take these actions on envelopes that are displayed on the *Envelope Lookup* page.

The screenshot shows the 'Envelope Lookup' page with a sidebar on the left containing filters and action buttons. The main area displays a list of envelopes, each with a header and a table of details.

Filters:

- All Filings (selected)
- My Firm's Filings
- My Filings Only
- Envelope #
- Case #
- Date Range
- Status
- Locations

Buttons: RESET, APPLY, EXPORT

Envelope List:

Envelope #	Filing Status	Filing Code	Filing Description	Date Reviewed	Reviewer
201605	Accepted By Court	Abstract Of Judgment	Test Filing	06/06/2023 9:25 PM CDT	Test Reviewer
201604	Submitted	Action - Subsequent Only	Test Filing		Reviewer
201603	Submitted	Abstract Of Judgment	Test Filing		Reviewer
201602	Submitted	Abstract Of Judgment	Test Filing		Reviewer
201601	Accepted By Court	Abstract Of Judgment	Test Filing 2	06/06/2023 9:17 PM CDT	Test Reviewer

Items per page: 25 | 276 - 300 of 2528

Figure 11.11 – Example of an Envelope Lookup Page

To view refunded and voided fees from the *Envelope Lookup* page:

1. Locate the envelope to which you want to add a refunded or voided fee record.

Note: The envelope must already have been accepted by the court, and the payment type must not be a waiver.

2. Click  , and then select **Refunded and Voided Fees** from the action menu.

The action menu is a vertical list of options:

- Envelope Details
- Service Contacts
- Action History
- Refunded and Voided Fees

Figure 11.12 – Example of an Action Menu

The *Refunded and Voided Fees* dialog box is displayed.

Refunded and Voided Fees
Envelope # 193422

Refund Date *

Refund Date is Required.

Amount Refunded *

Required

Refund Reason *
Select...

Refund Reason is Required.

Refund Comments

CANCEL SAVE

Figure 11.13 – Example of a Refunded and Voided Fees Dialog Box

3. Type a date in the **Refund Date** field, or select a date from the calendar.
4. Type the amount to be refunded in the **Amount Refunded** field.
5. Select the reason for the refund or void from the **Refund Reason** drop-down list.

Refund Reason *
Select...
Select...
Capture on Reject
Fees failed transmission to CMS
Mail Service Error

Figure 11.14 – Example of a Refund Reason Drop-Down List

6. If you have any comments to add, type them in the **Refund Comments** field.
7. Click **Save**.

Refunded and Voided Fees

Envelope # 193422

Refund Date *
01/21/2023

Amount Refunded *
10.00

Refund Reason *
Mail Service Error

Refund Comments
Refund expected soon.

CANCEL SAVE

Figure 11.15 – Example of a Refunded and Voided Fees Dialog Box with Information Added

Note: You can only enter information in the *Refunded and Voided Fees* dialog box. The information that you enter in the dialog box does not affect the fees that are attached to the envelope.

12 Court Administrator

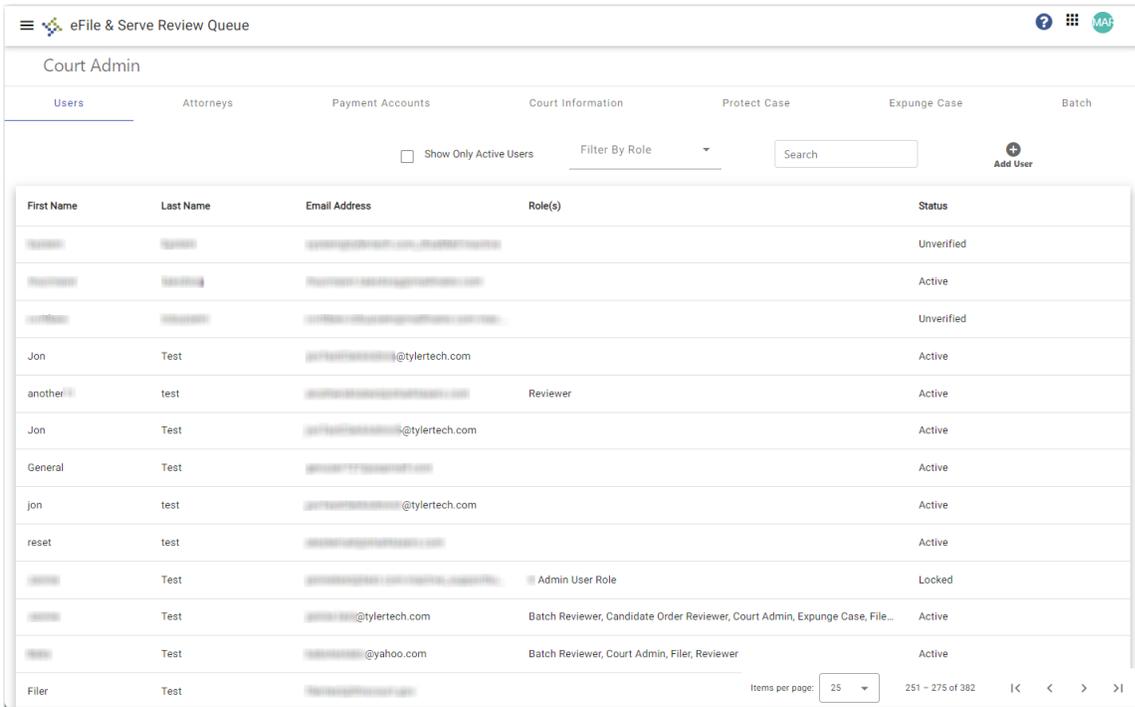
Topics covered in this chapter

- ◆ Creating a New Court User Account
- ◆ Editing a Court User Account
- ◆ Searching for a Court User
- ◆ Deleting a Court User Account
- ◆ Adding an Attorney to the Firm
- ◆ Unlocking an Envelope
- ◆ Protect Case
- ◆ Expunge Individual Cases
- ◆ Unlocking a Batch Envelope
- ◆ Restart Batch Process

The Court Administrator oversees all the functions performed on the *Court Admin* page.

Note: You must have “Court Administrator” rights to perform court administration functions.

Note: If you only want to view the active users, select the Show Only Active Users check box.



The screenshot shows the 'Court Admin' page with a navigation menu at the top containing 'Users', 'Attorneys', 'Payment Accounts', 'Court Information', 'Protect Case', 'Expunge Case', and 'Batch'. Below the menu, there is a search bar and a checkbox for 'Show Only Active Users'. The main content is a table of users with the following columns: First Name, Last Name, Email Address, Role(s), and Status. The table contains 13 rows of user data.

First Name	Last Name	Email Address	Role(s)	Status
[Redacted]	[Redacted]	[Redacted]		Unverified
[Redacted]	[Redacted]	[Redacted]		Active
[Redacted]	[Redacted]	[Redacted]		Unverified
Jon	Test	[Redacted]@tylertech.com		Active
another	test	[Redacted]	Reviewer	Active
Jon	Test	[Redacted]@tylertech.com		Active
General	Test	[Redacted]		Active
jon	test	[Redacted]@tylertech.com		Active
reset	test	[Redacted]		Active
[Redacted]	Test	[Redacted]	Admin User Role	Locked
[Redacted]	Test	[Redacted]@tylertech.com	Batch Reviewer, Candidate Order Reviewer, Court Admin, Expunge Case, File...	Active
[Redacted]	Test	[Redacted]@yahoo.com	Batch Reviewer, Court Admin, Filer, Reviewer	Active
Filer	Test	[Redacted]		

Figure 12.1 – Example of a Court Admin Page

The Court Administrator is responsible for the following functions:

- Approve or reject new users
- Manage court users
- Modify user accounts

- Expunge a case
- Protect a case
- Unprotect a case
- Unlock a locked envelope or a locked batch in the queue
- Restart a batch if envelopes are stuck in processing
- Filter envelopes by reviewer on the *Review History* page
- Update firm information
- Manage user roles

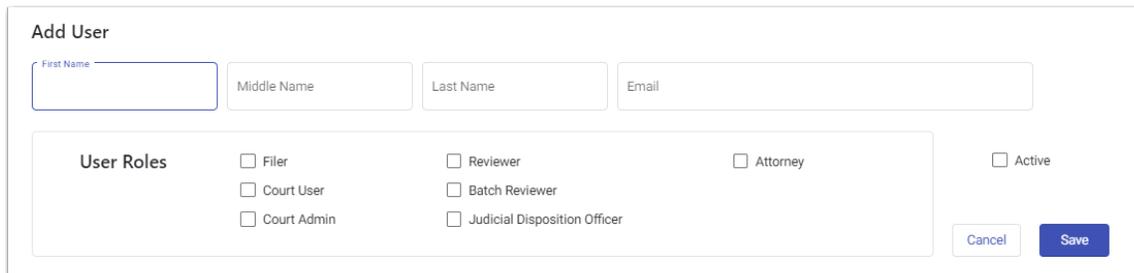
Creating a New Court User Account

The Court Administrator can add new court users.

Note: You must have “Court Administrator” rights to perform court administration functions.

To add a new court user:

1. On the *Court Admin* page, click  .
The *Add User* dialog box is displayed.



The screenshot shows the 'Add User' dialog box. It has a title bar 'Add User'. Below the title bar are four input fields: 'First Name', 'Middle Name', 'Last Name', and 'Email'. Below these fields is a section titled 'User Roles' containing several checkboxes: 'Filer', 'Court User', 'Court Admin', 'Reviewer', 'Batch Reviewer', 'Judicial Disposition Officer', and 'Attorney'. To the right of these checkboxes is an 'Active' checkbox. At the bottom right of the dialog box are two buttons: 'Cancel' and 'Save'.

Figure 12.2 – Add User Dialog Box

2. Select the check boxes for each role that you want to assign to the new user.
The *Role granted at* dialog box is displayed.

Editing a Court User Account

You can edit the roles and status of an existing court user.

Note: You must have “Court Administrator” rights to perform court administration functions.

First Name	Last Name	Email Address	Role(s)	Status
				Unverified
				Active
				Unverified
Jon	Test	@tylertech.com		Active
another	test		Reviewer	Active
Jon	Test	@tylertech.com		Active
General	Test			Active
jon	test	@tylertech.com		Active
reset	test			Active
	Test		Admin User Role	Locked
	Test	@tylertech.com	Batch Reviewer, Candidate Order Reviewer, Court Admin, Expunge Case, File...	Active
	Test	@yahoo.com	Batch Reviewer, Court Admin, Filer, Reviewer	Active
Filer	Test			

Figure 12.4 – Example of a Court Admin Page

To edit a court user account:

1. On the *Court Admin* page, navigate to the row of the court user whose account you want to edit.
2. When you have located the row of the specified user, to the right of the **Status** column, click the Edit

icon ().

Note: The Edit icon is displayed when you hover your mouse anywhere in the row of the specified court user.

The dialog box with the specified user's information is displayed.

Figure 12.5 – Example of a Court User Dialog Box

3. Make your changes to the user account, and then click



Searching for a Court User

You can search for a court user on the *Court Admin* page, or you can filter the users by their assigned roles.

Note: You must have “Court Administrator” rights to perform court administration functions.

To search for a court user:

1. If you want to search for a court user by name, in the **Search** field on the *Court Admin* page, type one or more letters of the names of the court users whom you want to find.

Figure 12.6 – Filter By Role Drop-Down List and Search Field

A filtered list of court users who match your search is displayed.

2. If you want to search for court users who have a particular role assigned to them, select the roles that you want to filter from the **Filter By Role** drop-down list.

The court users who have the specified roles are displayed.

Deleting a Court User Account

You can delete a court user account from the eFile & Serve Review Queue.

Note: You must have “Court Administrator” rights to perform court administration functions.

First Name	Last Name	Email Address	Role(s)	Status
Harriet	Doe	harriet.doe@tylertech.com		Unverified
Harriet	Doe	harriet.doe@tylertech.com		Active
Harriet	Doe	harriet.doe@tylertech.com		Unverified
Jon	Test	jon.test@tylertech.com		Active
another	test	another.test@tylertech.com	Reviewer	Active
Jon	Test	jon.test@tylertech.com		Active
General	Test	general.test@tylertech.com		Active
jon	test	jon.test@tylertech.com		Active
reset	test	reset.test@tylertech.com		Active
Admin	Test	admin.test@tylertech.com	Admin User Role	Locked
Batch	Test	batch.test@tylertech.com	Batch Reviewer, Candidate Order Reviewer, Court Admin, Expunge Case, File...	Active
Batch	Test	batch.test@yahoo.com	Batch Reviewer, Court Admin, Filer, Reviewer	Active
Filer	Test	filer.test@tylertech.com		

Figure 12.7 – Example of a Court Admin Page

To delete a court user account:

1. On the *Court Admin* page, navigate to the row of the court user whose account you want to delete.
2. When you have located the row of the specified court user, to the right of the **Status** column, click the

Delete icon ().

Note: The Delete icon is displayed when you hover your mouse anywhere in the row of the specified court user.

A message is displayed:

Are you sure you want to delete: Harriet Doe?

3. Click  to continue, or click  to cancel the action.

If you continued with your action, the court user account is deleted from the eFile & Serve Review Queue.

Adding an Attorney to the Firm

You can add an attorney to the firm on the *Court Admin* page.

Note: You must have “**Court Administrator**” rights to perform this procedure.

To add an attorney to the firm:

1. On the *Court Admin* page, click **Attorneys**.

The *Attorneys* page is displayed.

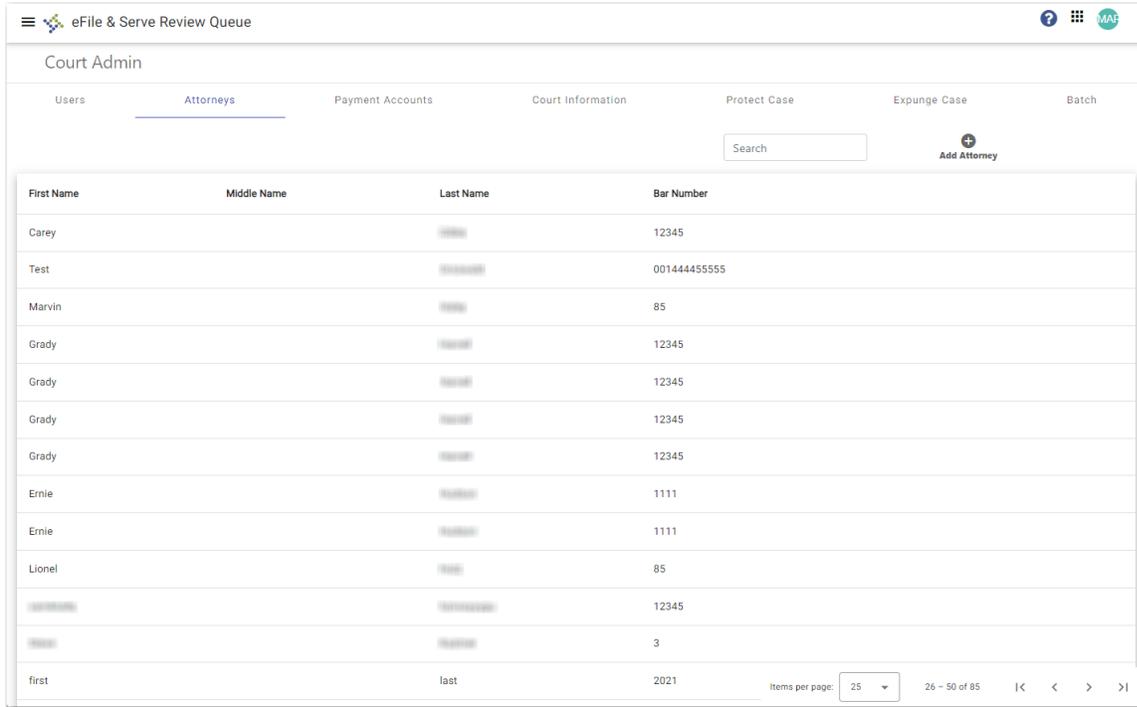
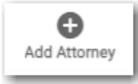


Figure 12.8 – Example of an Attorneys Page—Court Admin Page

2. Click .

The *Add Attorney* window is displayed.

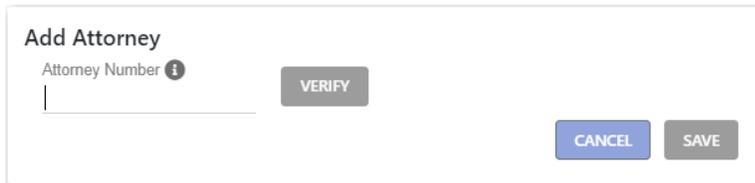


Figure 12.9 – Add Attorney Window

3. Type the attorney number in the **Attorney Number** field, and then click .

If the attorney number that you typed matches an attorney in your firm, the attorney's name is displayed.

SAVE

4. Click

The new attorney is added to the list of attorneys on the *Attorneys* page.

Unlocking an Envelope

A Court Administrator can unlock an envelope that has been locked by another reviewer who is working on the case.

Note: You must have “Court Administrator” rights to perform this action.

To unlock an envelope:

1. Navigate to the *Review Queue* page.

Filters	Envelope #	Case #	Submit Date	Status	Filing Code	Filing Description	Case Title	Case Type	Judge	Filed By	Filing Attorney	Queue	Reviewer	Lock
Envelope # Search...	202846	CC-23-1890	06/27/2023 9:03 AM CDT	Under Review	Acknowledgeme...		Division Of Prop...				aa2 aa2	Default		
Case # Search...	202967		06/28/2023 3:09 PM CDT	Submitted	Acknowledgeme...		Appeal				Magnolia Cat	Default		
Bulk #	203085		06/29/2023 9:04 AM CDT	Under Review	Acknowledgeme...		Appeal			John Allan Smith	Mary S Adams	Default	Paresh Soni	
Date Range	203228	CC-23-1890	06/30/2023 2:55 PM CDT	Under Review	Acknowledgeme...		Division Of Prop...				firm attorney	Default		
Queues	203534	CC-22-2717	07/05/2023 9:48 AM CDT	Under Review	Acknowledgeme... Addendum		Matty Reeverv B... Breach Of Contr...				Mary S Adams	Default	test okta	
Filing Codes	203535	CC-22-2717	07/05/2023 10:19 AM CD	Under Review	Acknowledgeme... Addendum		Matty Reeverv B... Breach Of Contr...				firm attorney	Default	April D Scott	
Case Types	203727		07/10/2023 9:44 AM CDT	Under Review	Certificate w/ Do... Complaint - w/ H... ServiceContacts	*****	City Ordinance C...					Default		
Locations	203729		07/10/2023 10:11 AM CD	Under Review	Certificate w/ Do... Complaint - w/ H... ServiceContacts		City Ordinance C...					Default		
Organizations	203730		07/10/2023 10:12 AM CD	Under Review	Certificate w/ Do... Complaint - w/ H... ServiceContacts		City Ordinance C...					Default		
<input type="checkbox"/> Show Deferred	203732		07/10/2023 10:19 AM CD	Under Review	Acknowledgeme... Abstract Of Jud...		Appellate Case				aa2 aa2	Default		
<input type="checkbox"/> Auto-Refresh	203734		07/10/2023 10:26 AM CD	Under Review	Acknowledgeme...		Appellate Case				Mary S Adams	Default		
<input type="button" value="RESET"/> <input type="button" value="APPLY"/>	203735		07/10/2023 10:28 AM CD	Under Review	Acknowledgeme...		Appellate Case				Mary S Adams	Default		
	203736		07/10/2023 10:31 AM CD	Under Review	Acknowledgeme...		Division Of Prop...				Mary S Adams	Default		
	203744		07/10/2023	Under Review	Acknowledgeme...		Division Of Prop...					Default		

Figure 12.10 – Example of a Review Queue Page

2. Locate the envelope that you want to unlock. Then, click the Lock icon ().

A message is displayed:

Are you sure you want to unlock this envelope?

3. Click to continue, or click to cancel the action.

If you continued with your action, a confirmation message is displayed.

Protect Case

The **Protect Case** feature provides the ability to hide certain case information.

Note: You must have “Court Administrator” rights to perform court administration functions.

The following information can be protected with this feature:

- Party name (first, middle, last, or business)
- Party contact information (phone number, street address)
- Party attorney name (first, middle, last, or business)
- Case description
- Judge assignment
- Case initiation date (also called the “Case Filed Date”)

Cases that are protected are not displayed in the results when the user searches by party name.

Court Administrators can also unprotect a protected case.

Protecting a Case

A case can be protected when you want to hide information about the case.

Note: You must have “Court Administrator” rights to perform this action.

To protect a case:

1. Navigate to the *Court Admin* page.

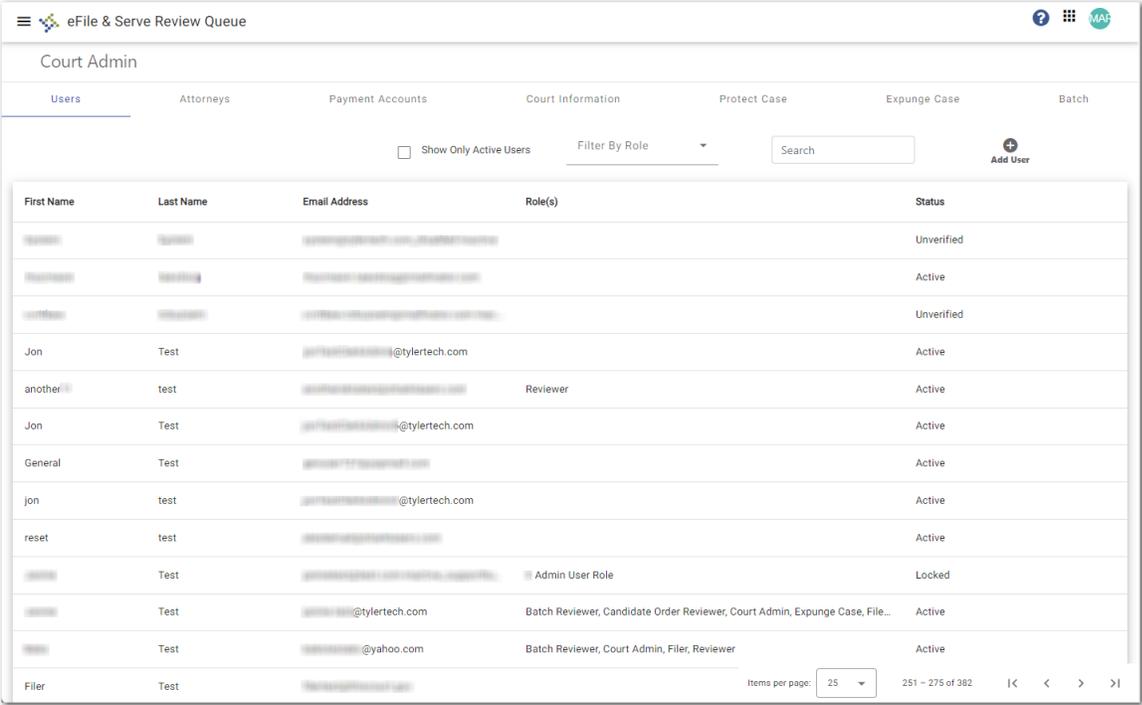


Figure 12.11 – Example of a Court Admin Page

- 2. On the *Court Admin* page, click **Protect Case**.
The *Protect Case* page is displayed.

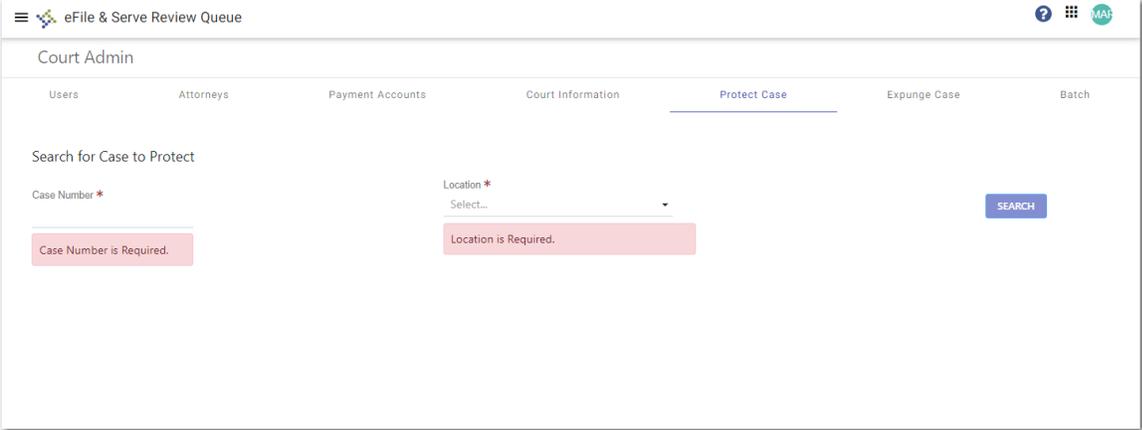


Figure 12.12 – Example of a Protect Case Page

- 3. In the **Search for Case to Protect** section, type the case number in the **Case Number** field.
- 4. From the **Location** drop-down list, select the location of the case.

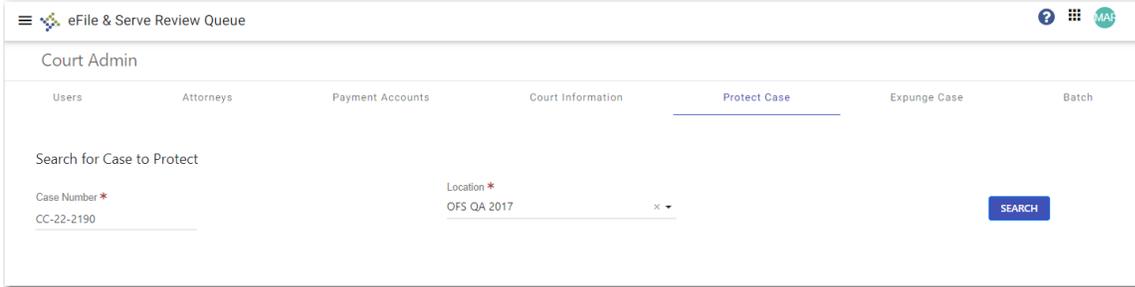


Figure 12.13 – Example of a Protect Case Page with Case Number and Location Displayed

5. Click .

If a case matches your search criteria, the case is displayed.

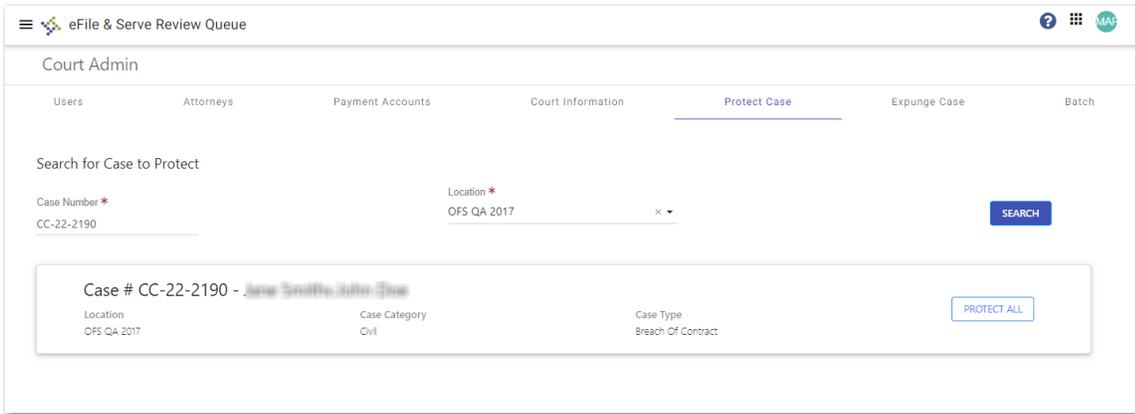


Figure 12.14 – Example of a Case Found on a Case Search

6. To protect (hide) the information associated with the case, click .

When users search for a protected case, the case is displayed with the protected information hidden. The case title is replaced with asterisks, and the names of the parties on the case are replaced with text such as "Hidden Party."

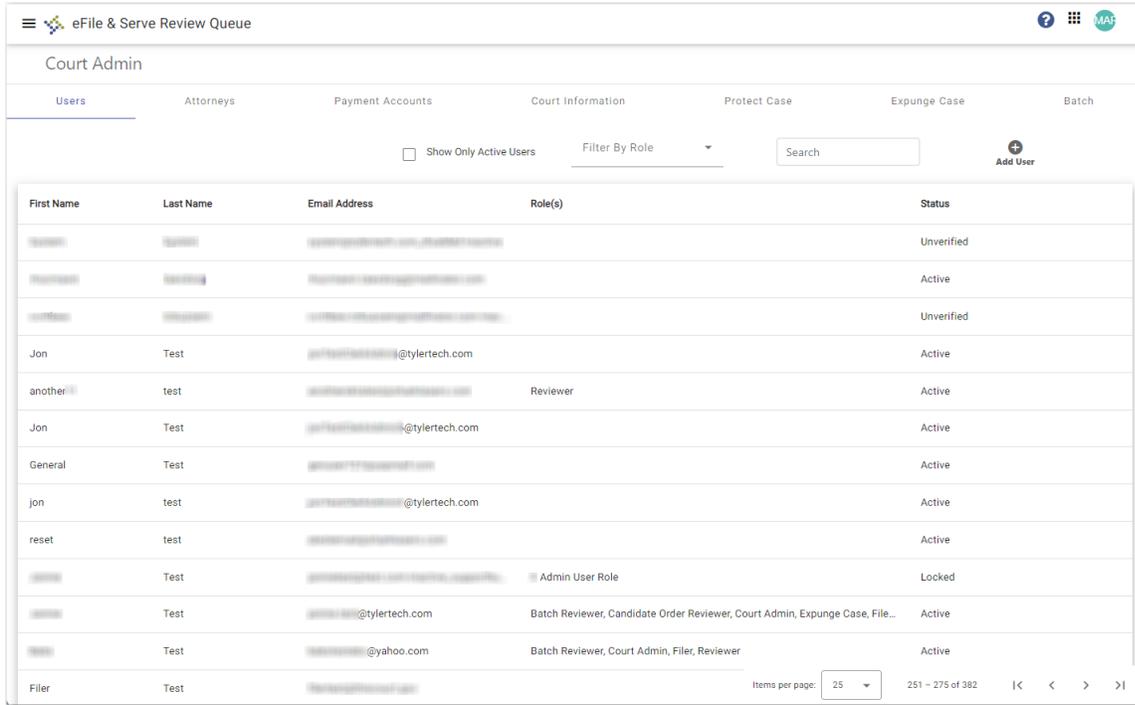
Unprotecting a Case

A case that is already protected can be unprotected.

Note: You must have “Court Administrator” rights to perform this action.

To unprotect a case:

1. Navigate to the *Court Admin* page.



The screenshot shows the 'Court Admin' page with a navigation menu at the top. The 'Users' tab is selected. Below the navigation are options for 'Show Only Active Users', 'Filter By Role', and a search box. An 'Add User' button is also present. The main content is a table of users with the following data:

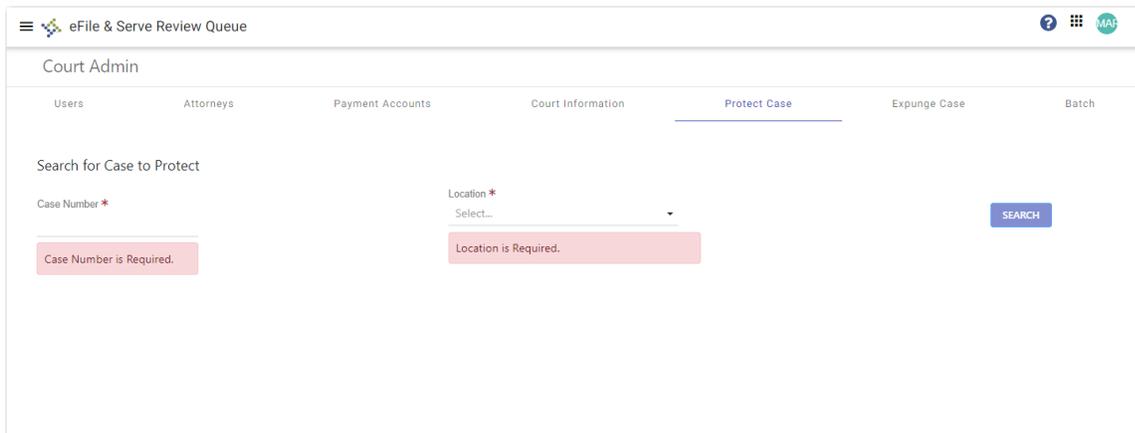
First Name	Last Name	Email Address	Role(s)	Status
[Redacted]	[Redacted]	[Redacted]		Unverified
[Redacted]	[Redacted]	[Redacted]		Active
[Redacted]	[Redacted]	[Redacted]		Unverified
Jon	Test	[Redacted]@tylertech.com		Active
another	test	[Redacted]	Reviewer	Active
Jon	Test	[Redacted]@tylertech.com		Active
General	Test	[Redacted]		Active
jon	test	[Redacted]@tylertech.com		Active
reset	test	[Redacted]		Active
[Redacted]	Test	[Redacted]	Admin User Role	Locked
[Redacted]	Test	[Redacted]@tylertech.com	Batch Reviewer, Candidate Order Reviewer, Court Admin, Expunge Case, File...	Active
[Redacted]	Test	[Redacted]@yahoo.com	Batch Reviewer, Court Admin, Filer, Reviewer	Active
Filer	Test	[Redacted]		

At the bottom right of the table, there is a pagination control showing 'Items per page: 25' and '251 - 275 of 382'.

Figure 12.15 – Example of a Court Admin Page

2. On the *Court Admin* page, click **Protect Case**.

The *Protect Case* page is displayed.



The screenshot shows the 'Protect Case' page. The 'Protect Case' tab is selected in the navigation menu. The page contains a search form with the following elements:

- A heading: 'Search for Case to Protect'
- A 'Case Number *' field with a red error message: 'Case Number is Required.'
- A 'Location *' dropdown menu with a red error message: 'Location is Required.'
- A 'SEARCH' button.

Figure 12.16 – Example of a Protect Case Page

3. In the **Search for Case to Protect** section, type the case number in the **Case Number** field.

4. From the **Location** drop-down list, select the location of the case.

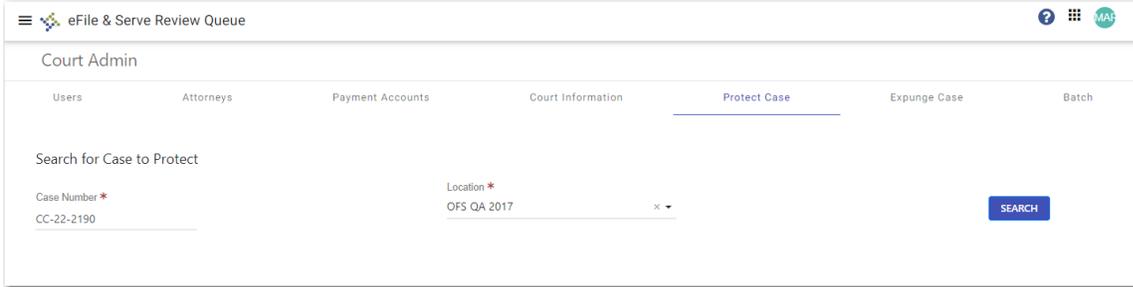


Figure 12.17 – Example of a Protect Case Page with Case Number and Location Displayed

5. Click .

A list of matching cases is returned. If the case is currently protected, the **Unprotect All** button is displayed to the right of the case.

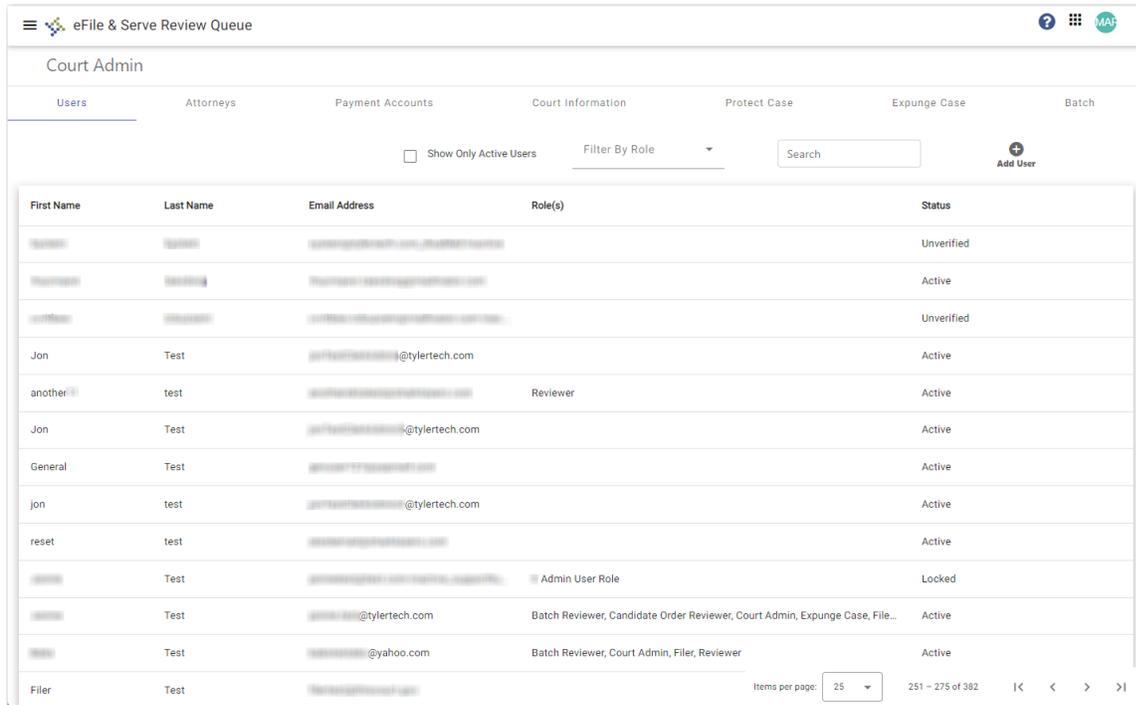
6. To unprotect the specified case, click .

The case name and the party name are displayed again in the case management system.

Expunge Individual Cases

Court reviewers can search for a case, select a specific case, and then expunge it from the system so that filers cannot file against that case.

Note: You must have “Court Administrator” rights to perform court administration functions.



First Name	Last Name	Email Address	Role(s)	Status
				Unverified
				Active
				Unverified
Jon	Test	@tylertech.com		Active
another	test		Reviewer	Active
Jon	Test	@tylertech.com		Active
General	Test			Active
jon	test	@tylertech.com		Active
reset	test			Active
	Test		Admin User Role	Locked
	Test	@tylertech.com	Batch Reviewer, Candidate Order Reviewer, Court Admin, Expunge Case, File...	Active
	Test	@yahoo.com	Batch Reviewer, Court Admin, Filer, Reviewer	Active
Filer	Test			

Figure 12.18 – Example of a Court Admin Page

After a case has been expunged, it is listed on the *Envelope Lookup* page with the word “Expunged” displayed next to the envelope number in place of the case information. The case is no longer listed on the *Review History* page.

Expunging a Case

You can expunge a case from the system so that filers cannot file into that case.

Note: You must have “Court Administrator” rights to perform court administration functions.

To expunge a case:

1. On the *Court Admin* page, click the **Expunge Case** tab.

The *Search for Case to Expunge* page is displayed.

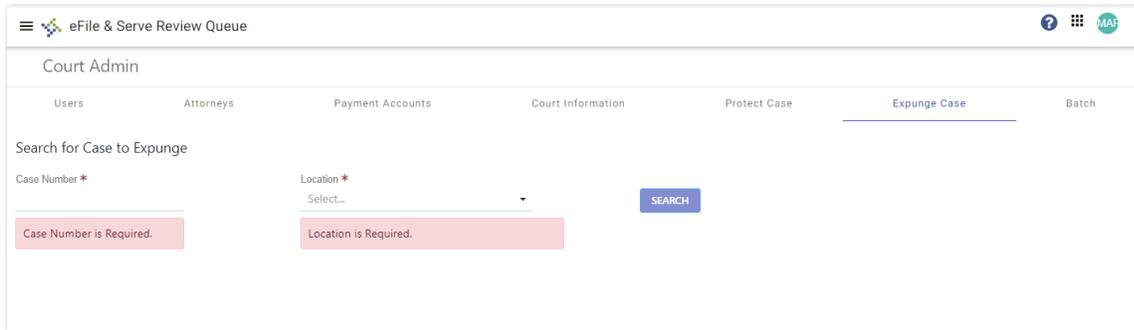


Figure 12.19 – Example of a Search for Case to Expunge Page

2. Type the case number in the **Case Number** field, and then select the location from the **Location** drop-down list. Then, click  .

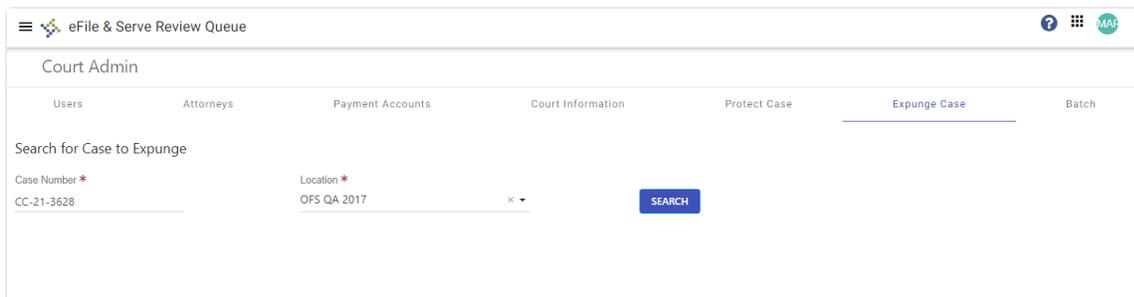


Figure 12.20 – Example of a Search for Case to Expunge Page with Case Number and Location Added

All cases that match the case number that you entered are displayed in the results. The case information, party type and name, address, and attorney are included in the results.

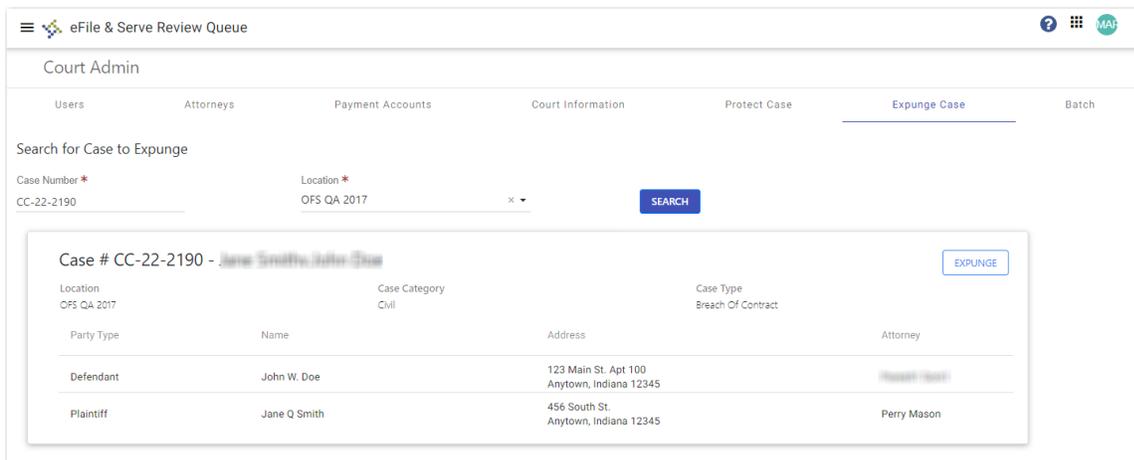


Figure 12.21 – Example of a Case Found on the Search for Case to Expunge Page

3. If the case displayed is the one you want to expunge, click  .

A confirmation dialog box is displayed.

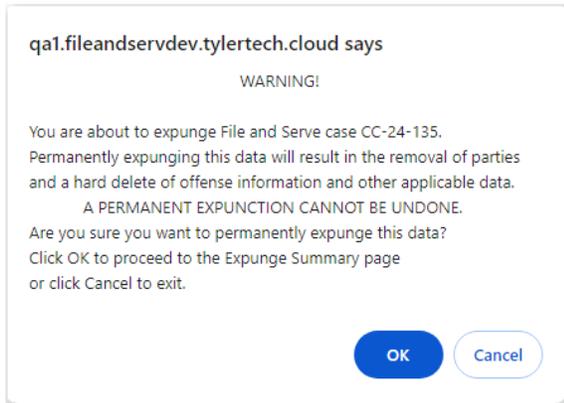


Figure 12.22 – Example of a Confirmation Dialog Box

4. If you want to continue, click .

The *Expunge Case Details* window is displayed so that you can confirm your selection.

Note: Expungement of a case is permanent.

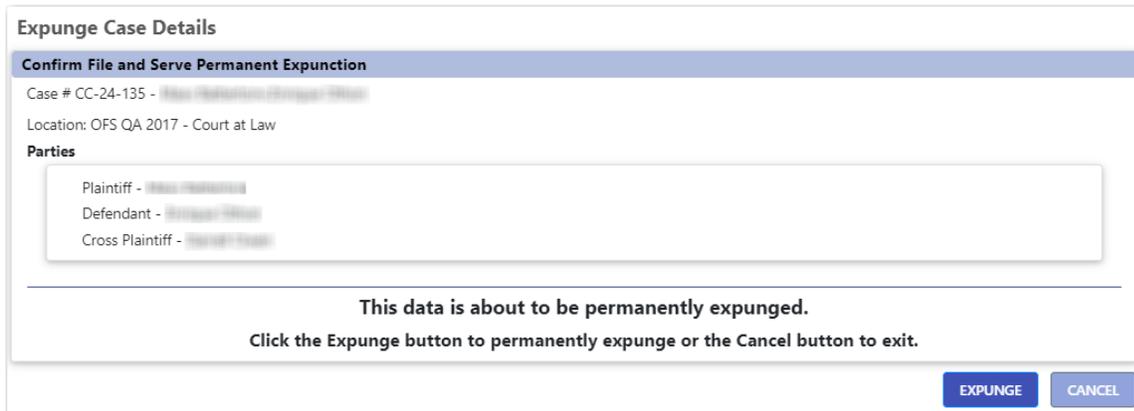


Figure 12.23 – Example of an Expunge Case Details Window

5. To continue, click .

The case is expunged.

Note: The case must also be expunged from the case management system.

Unlocking a Batch Envelope

A Court Administrator can unlock a batch envelope that has been locked by another reviewer who is working on the case.

Note: You must have “Court Administrator” rights to perform this action.

Note: The Batch Review feature is configured by Tyler and may not be available in your application.

To unlock a batch envelope:

1. Navigate to the *Court Admin* page.

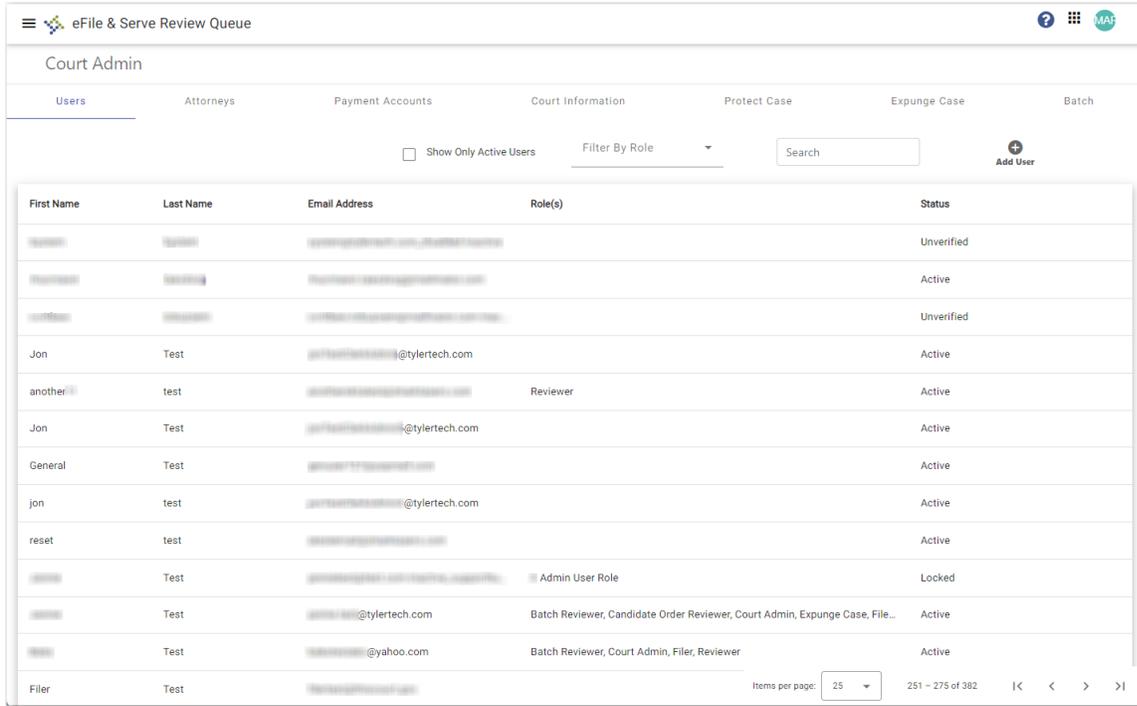


Figure 12.24 – Example of a Court Admin Page

2. On the *Court Admin* page, click **Batch**.

The *Batch* page is displayed.

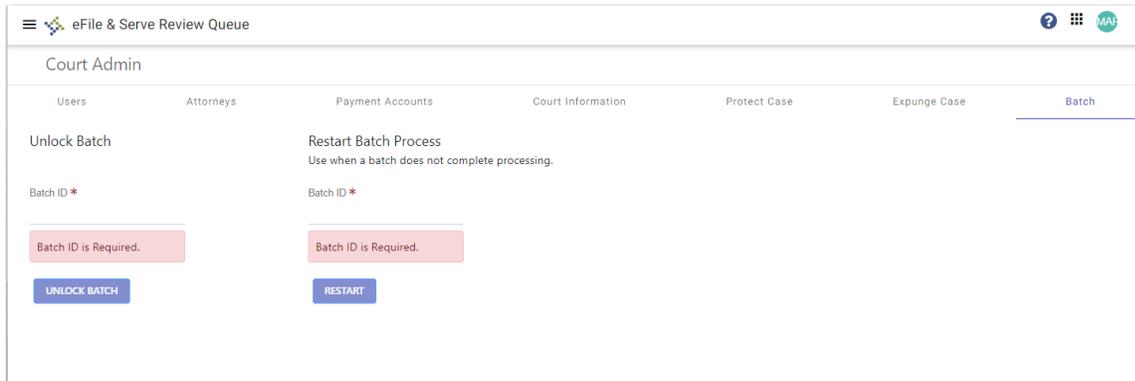


Figure 12.25 – Example of a Batch Page

3. Type the ID number of the batch in the **Batch ID** field.

4. Click

UNLOCK BATCH

The batch envelope is unlocked.

Restart Batch Process

The **Restart Batch** feature is used when batches are stuck during the Accept or Reject process.

Note: You must have “Court Administrator” rights to restart a batch.

Note: The Batch Review feature is configured by Tyler and may not be available in your application.

The **Restart Batch** option restarts the processing of batches where it left off. If there are a large number of envelopes in a batch, processing will take some time.

Note: If a batch is stuck during processing, occasionally the batch could get stuck again.

If you notice that a batch is stuck in processing, you can try to restart the batch yourself on the *Court Admin* page. If you are unable to restart a batch yourself, contact Tyler Support for assistance.

Restarting a Batch

If a batch is stuck during the Accept or Reject process, you can restart the batch.

Note: You must have “Court Administrator” rights to perform this action.

Note: The Batch Review feature is configured by Tyler and may not be available in your application.

To restart a batch:

1. Navigate to the *Court Admin* page.

First Name	Last Name	Email Address	Role(s)	Status
[Redacted]	[Redacted]	[Redacted]		Unverified
[Redacted]	[Redacted]	[Redacted]		Active
[Redacted]	[Redacted]	[Redacted]		Unverified
Jon	Test	[Redacted]@tylertech.com		Active
another	test	[Redacted]	Reviewer	Active
Jon	Test	[Redacted]@tylertech.com		Active
General	Test	[Redacted]		Active
jon	test	[Redacted]@tylertech.com		Active
reset	test	[Redacted]		Active
[Redacted]	Test	[Redacted]	Admin User Role	Locked
[Redacted]	Test	[Redacted]@tylertech.com	Batch Reviewer, Candidate Order Reviewer, Court Admin, Expunge Case, File...	Active
[Redacted]	Test	[Redacted]@yahoo.com	Batch Reviewer, Court Admin, Filer, Reviewer	Active
Filer	Test	[Redacted]		

Figure 12.26 – Example of a Court Admin Page

2. On the *Court Admin* page, click **Batch**.

The *Batch* page is displayed.

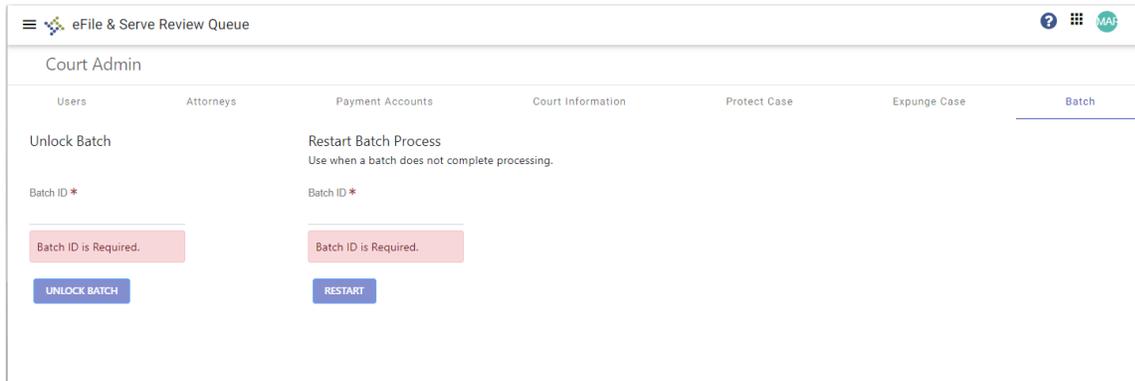


Figure 12.27 – Example of a Batch Page

3. In the **Restart Batch Process** section, type the ID number of the batch in the **Batch ID** field.

4. Click

RESTART

One of the following will occur:

- If the batch has not been accepted or rejected, the following red error message will be displayed:
Batch must have been accepted or rejected to restart.
- If work items are still processing, the following red error message will be displayed:
Batch was previously successfully Accepted/Rejected. Envelopes may still be processing.
- If work items have not successfully processed for the batch's envelopes, the following blue message will be displayed:
Batch Restarted

13 Notification Admin Page

Topics covered in this chapter

◆ Queue Notifications

Use the *Notification Admin* page to create message notifications that are sent immediately to all filers and reviewers who are currently signed in to the eFile & Serve Review Queue.

Note: This feature is available only to users who have the “Court Administrator” rights.

The screenshot shows the 'Notification Admin' interface. It has a header with the eFile & Serve Review Queue logo and a 'Notification Admin' title. The main content area is divided into three sections:

- Send Immediate Notifications to Users Currently Signed In:** Includes a dropdown for 'Audience' (set to 'ALL PARTIES'), a text area for the 'Immediate Notification Message', and a 'SEND' button.
- Schedule Notifications:** Includes a dropdown for 'Audience' (set to 'ALL PARTIES'), a date field for 'Enter Date', a text area for the 'Scheduled Notification Message', and an 'ADD' button.
- View and Edit Scheduled Notifications:** Includes a dropdown for 'Select Audience', a date field for 'Enter Date', a text area for 'Edit Scheduled Notifications', and an 'EDIT' button.

At the bottom, there is a table titled 'Scheduled Notification Messages' with columns: Message ID, Status, Start Date, End Date, and Message.

Figure 13.1 – Example of a Notification Admin Page

After you create a message notification, it is displayed on the following pages:

- *Review Queue* page
- *Review History* page
- *Envelope Lookup* page
- *Court Admin* page
- *User Profile* page

Multiple notifications can be displayed at the same time. You can dismiss a notification if you want. Click **x** to dismiss a message notification.

Queue Notifications

When a notification must be sent to all reviewers, it is displayed at the top of each page in the eFile & Serve Review Queue. Multiple notifications can be displayed at the same time. If you want to dismiss a notification, click **x**.

The following pages display the notifications:

- *Review Queue* page
- *Review History* page
- *Envelope Lookup* page
- *Court Admin* page
- *User Profile* page

The screenshot shows the 'eFile & Serve Review Queue' interface. At the top, there are three notification banners, each with a bell icon and a close 'x' button. Below the notifications is the 'Review Queue' table. The table has a left-hand filter sidebar and a main table area with columns for Envelope #, Case #, Submit Date, Status, Filing Code, Filing Descript..., Case Title, Case Type, Judge, Filed By, Filing Attorney, Queue, Reviewer, and Lock. The table contains 13 rows of data. At the bottom right of the table, there is a pagination control showing 'Items per page: 25' and '1 - 25 of 15795'.

Filters	Envelope #	Case #	Submit Date	Status	Filing Code	Filing Descript...	Case Title	Case Type	Judge	Filed By	Filing Attorney	Queue	Reviewer	Lock
Envelope # Search...	164594	642-24646	09/27/2021 2:13 PM CDT	Draft Under R...	Order	delete this one	Babs Revenv...	Breach Of Co...	Bender, Bill					
Case # Search...	165219		10/18/2021 2:01 PM CDT	Draft Under R...	Order			Broken Case ...						
Date Range	169403		01/18/2022 2:00 PM CST	Under Review	Order	Test Filing		Breach Of Co...						
Queues	169410	12345678901234567890	11/08/2021 12:00 PM CST	Draft Under R...	Proposed Or...			Breach Of Co...						
Filing Codes	169413	123123123	11/08/2021 2:19 PM CST	Draft Under R...	Order	Document D...		Adult Criminal		Alan Winograd				
Case Types	169415		11/08/2021 2:27 PM CST	Draft Under R...	Order			Appeal					test okta	
Locations	169417		11/08/2021 3:06 PM CST	Draft Under R...	Order			Breach Of Co...		cpemuamzlg...				
Organizations	169519		11/09/2021 2:09 PM CST	Draft Under R...	Order			Appeal						
<input type="checkbox"/> Show Deferred	169645		11/10/2021 2:40 PM CST	Draft Under R...	Order			Breach Of Co...					test okta	
<input type="checkbox"/> Auto-Refresh	169647		11/10/2021 2:42 PM CST	Draft Under R...	Order			Mental Health						
RESET APPLY	169746		11/11/2021 8:21 AM CST	Draft Under R...	Order			Mental Health...		Jeff F...				
	169758	CC-21-3196	11/11/2021 1:22 PM CST	Draft Under R...	Order	*****		Protective Or...						

Figure 13.2 – Example of the Review Queue Page with Notifications at the Top

14 Judicial Disposition Officer

Topics covered in this chapter

- ◆ Proposed Order Filings
- ◆ Add Service Contacts to Proposed Order Child Envelopes
- ◆ Judicial Disposition Officer Filing Actions
- ◆ Viewing the Parent and Child Envelope Details

The Judicial Disposition Officer performs specific actions on a Proposed Order filing after it has been submitted and reviewed by the Court Administrator.

Note: You must have “Judicial Disposition Officer” rights to perform judicial officer functions.

The Judicial Disposition Officer processes Proposed Order filings in an envelope. The Judicial Disposition Officer can perform the following actions on a Proposed Order filing:

- Forward the filing to another queue
- Grant or receipt the filing
- Deny the filing
- Moot the filing
- Defer the filing to another date
- Return a filing for revision
- Delete a filing
- End the review

Proposed Order Filings

Only the Judicial Disposition Officer can take action on Proposed Order filings.

The information for a Proposed Order filing is displayed in the queue. Locate the envelope for which you want to view the filing information.

Click the **File** tab to view the Filing Information pane.

Then, click **Proposed Filings** to view the information for the proposed orders. Information for each proposed order in the envelope is listed, along with links to the original document and the stamped document. Also listed is the filing code for the envelope.

Add Service Contacts to Proposed Order Child Envelopes

When you are reviewing a proposed order child envelope, you can add new service contacts to the envelope.

Note: You must have “Judicial Disposition Officer” rights to perform judicial officer functions.

When you add a new service contact to a proposed order child envelope, you can add an existing service contact from your firm list or from the public list. You can also create a new service contact.

To add a service contact from the firm list, select the service contact whom you want to add, and associate the service contact with a party on the case.

Add Service Contact

From Firm
 From Public List
 New

Parties

Select Parties ▼

At least one party is Required.

	Service Contact Name	Service Contact Email	Firm Name
<input type="checkbox"/>	anew acontact	asdf@asdf.com	Tyler System firm
<input type="checkbox"/>	asdf Adams	gorginadams@yahoo.com	Tyler System firm
<input type="checkbox"/>	Brian Adams	brianaasdf@tylertech.com	Tyler System firm
<input type="checkbox"/>	Geoffrey Adams	gadams@yahoo.com	Tyler System firm
<input type="checkbox"/>	Mary Adams	retrdwet@aqwer.com	Tyler System firm
<input type="checkbox"/>	George Adamson	gadams@yahoo.com	Tyler System firm
<input type="checkbox"/>	Demo AFeature	asdef@asfe.com	Tyler System firm
<input type="checkbox"/>	hmmepwh alcoctpk	hnmepwh.alcoctpk@tylertech.com	Tyler System firm
<input type="checkbox"/>	marty ales	wet@sdg.com	Tyler System firm
<input type="checkbox"/>	one amore	asdf@asdf.com	Tyler System firm

Prev 1 2 3 ... 734 Next

[Show Only Selected](#)

Figure 14.1 – Example of the Add Service Contact Window—From Firm Option Selected

To add a service contact from the public list, select the service contact whom you want to add, and associate the service contact with a party on the case.

Add Service Contact

From Firm
 From Public List
 New

Parties

Select Parties

At least one party is Required.

	Service Contact Name	Service Contact Email	Firm Name
<input type="checkbox"/>	qcainldu aedsbxah	qcainldu.aedsbxah@tylertech.com	Law Offices of yomasvnmwgz
<input type="checkbox"/>	ltytkfne afroxgse	ltytkfne.afroxgse@tylertech.com	Law Offices of yyjvhbcmvo
<input type="checkbox"/>	ccetgaww agshovuh	ccetgaww.agshovuh@tylertech.com	Law Offices of rijbiuncx
<input type="checkbox"/>	pyzlmnqm ahtdvgym	pyzlmnqm.ahtdvgym@tylertech.com	Law Offices of zcnnkivkg
<input type="checkbox"/>	mxunczog ajilpwjs	mxunczog.ajilpwjs@tylertech.com	Law Offices of rtyhmvjag
<input type="checkbox"/>	hrmepwh alcoctpk	hrmepwh.alcoctpk@tylertech.com	Tyler System firm
<input type="checkbox"/>	marty ales	wet@sdg.com	Tyler System firm
<input type="checkbox"/>	Andy Allison	test.contact@tylertech.com170395	abc firm
<input type="checkbox"/>	mpehjyse amcpovfj	mpehjyse.amcpovfj@tylertech.com	Law Offices of zifdgaocti
<input type="checkbox"/>	irjgnyd apebraie	irjgnyd.apebraie@tylertech.com	Tyler System firm

Prev 1 **2** 3 ... 1064 Next
[Show Only Selected](#)

Figure 14.2 – Example of the Add Service Contact Window—From Public List Option Selected

To add a new service contact, complete all of the required fields for the new service contact. Select the party that you want to associate with the service contact. Also, select the service method for the service contact.

Note: If you select the Mail service method, you must provide the address information for the service contact.

Select the **Make this contact also Public** check box if you want the service contact to be added to the public list.

Figure 14.3 – Example of the Add Service Contact Window—New Option Selected

Save the information that you entered for the service contact whom you want to add to the envelope.

Adding New Service Contacts to Proposed Order Child Envelopes

When you are reviewing a proposed order child envelope, you can add new service contacts to the envelope.

Note: You must have “Judicial Disposition Officer” rights to perform judicial officer functions.

To add new service contacts to an envelope:

1. On the *Review Queue* page, locate the envelope that you want to review.
2. Click the link for the envelope number to begin your review.

The envelope is displayed.

3. On the left panel, click the **Serve** tab.

The Service Contact Information pane is displayed.

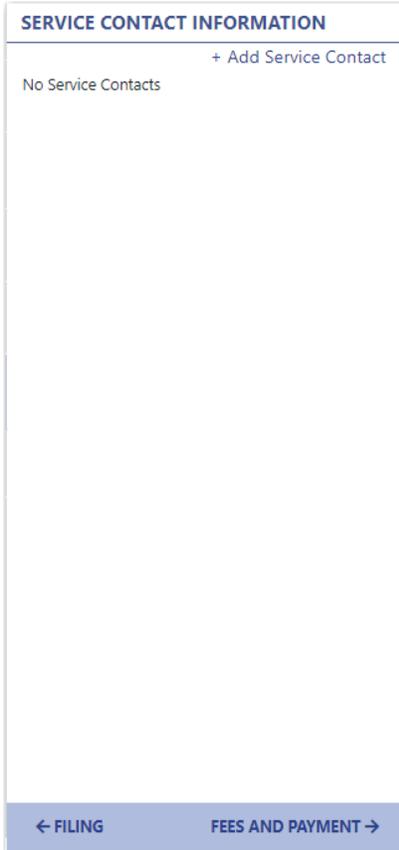


Figure 14.4 – Service Contact Information Pane—No Service Contacts Added Yet

4. Click .

The *Add Service Contact* window is displayed.

5. Do one of the following:
- Select **From Firm** to add a service contact from the firm list.
 - Select **From Public List** to add a service contact from the public list.
 - Select **New** to create a new service contact.

Note: When you create a new service contact, complete all of the required fields. Select the *Make this contact also Public* check box if you want the service contact to be added to the public list.

6. Associate the service contact whom you selected or created with one of the parties in the case.
7. After selecting an existing service contact, or creating a new service contact, and associating the service contact with a party, click .

Judicial Disposition Officer Filing Actions

When a Judicial Disposition Officer is reviewing a filing, the Judicial Disposition Officer can take an action on that filing. The available options are displayed in the Actions pane on the right side of the eFile & Serve Review Queue.

The Judicial Disposition Officer can perform some of the same actions as the reviewer, but the Judicial Disposition Officer can perform additional actions. The following actions are specific to the Judicial Disposition Officer role:

- **Receipt**—Receipt the filing, and type any relevant comments in the **Receipt Comments** field.
- **Grant**—Grant the filing, and type any relevant comments in the **Grant Comments** field.
- **Deny**—Deny the filing, and type any relevant comments in the **Deny Comments** field.
- **Moot**—Moot the filing, and type any relevant comments in the **Moot Comments** field.
- **Return to Filer**—Return the filing to the filer, and type any relevant comments in the *Return to Filer* dialog box.
- **Delete**—Delete the filing, and type any comments in the **Delete Comments** field.

The following actions can be performed by both the Judicial Disposition Officer and the reviewer:

- **Forward**—Forward the envelope to another queue that you have selected from the drop-down list in the *Forward Envelope* dialog box.
- **End Review**—End the review of the envelope, which you can continue at another time.

Receipting a Filing

When you are reviewing a filing, you can receipt the filing.

Note: This feature is configured by Tyler and may not be available in your application.

Note: You must have “Judicial Disposition Officer” rights to perform this procedure.

To receipt a filing:

1. In the Actions pane, click **Receipt**.

The *Receipt Filing* dialog box is displayed.

Figure 14.5 – Receipt Filing Dialog Box

2. If applicable, type any relevant comments in the **Receipt Comments** field.

3. When you are satisfied with the filing and your comments, click . Or, click  to close the dialog box without receipting the filing.

Granting a Filing

When you are reviewing a filing, you can grant, or receipt, the filing.

Note: This feature is configured by Tyler and may not be available in your application.

Note: You must have “Judicial Disposition Officer” rights to perform this procedure.

To grant a filing:

1. In the Actions pane, click **Grant**.

The *Grant Filing* dialog box is displayed.



Figure 14.6 – Grant Filing Dialog Box

2. If applicable, type any relevant comments in the **Grant Comments** field.
3. When you are satisfied with the filing and your comments, click . Or, click  to close the dialog box without granting the filing.

Denying a Filing

When you are reviewing a filing, you can deny the filing.

Note: This feature is configured by Tyler and may not be available in your application.

Note: You must have “Judicial Disposition Officer” rights to perform this procedure.

To deny a filing:

1. In the Actions pane, click **Deny**.

The *Deny Filing* dialog box is displayed.



Figure 14.7 – Deny Filing Dialog Box

2. If applicable, type any relevant comments in the **Deny Comments** field.

3. Click . Or, click  to close the dialog box without denying the filing.

Mooting a Filing

When you are reviewing a filing, you can moot the filing.

Note: This feature is configured by Tyler and may not be available in your application.

Note: You must have “Judicial Disposition Officer” rights to perform this procedure.

To moot a filing:

1. In the Actions pane, click **Moot**.

The *Moot Filing* dialog box is displayed.



Figure 14.8 – Moot Filing Dialog Box

2. If applicable, type any relevant comments in the **Moot Comments** field.

3. Click . Or, click  to close the dialog box without mooting the filing.

Returning a Filing to the Filer

When you are reviewing a filing, you can return that filing to the filer.

Note: This feature is configured by Tyler and may not be available in your application.

Note: You must have “Judicial Disposition Officer” rights to perform this procedure.

To return a filing to the filer:

1. In the Actions pane, click **Return to Filer**.

The *Return to Filer* dialog box is displayed.

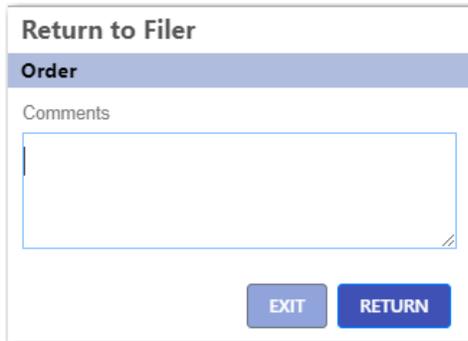


Figure 14.9 – Return to Filer Dialog Box

2. If applicable, type any relevant comments in the **Comments** field.

3. Click . Or, click  to close the dialog box without returning the filing.

Deleting a Filing

When you are reviewing a filing, you can choose to delete that filing.

Note: This feature is configured by Tyler and may not be available in your application.

Note: You must have “Judicial Disposition Officer” rights to perform this procedure.

To delete a filing:

1. In the Actions pane, click **Delete**.

The *Delete Filing* dialog box is displayed.



Figure 14.10 – Delete Filing Dialog Box

2. If applicable, type any relevant comments in the **Delete Comments** field.

3. Click . Or, click  to close the dialog box without deleting the filing.

Viewing the Parent and Child Envelope Details

The Judicial Disposition Officer can view the parent and child envelope details while reviewing a proposed order draft.

To view the parent envelope details while reviewing a proposed order draft:

1. On the *Review Queue* page, locate the proposed order draft that you want to review.

2. Click , and then click **Parent Envelope Details** from the action menu.

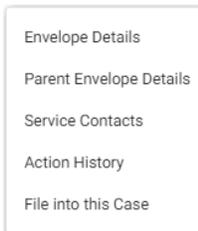


Figure 14.11 – Example of an Action Menu

The envelope details for the parent envelope are displayed.

Envelope Detail

[CHILD ENVELOPE](#) [PRINT](#) [CLOSE](#)

Case # CC-22-052 - Envelope # 174257

Case

Case Number: CC-22-052	Description: Matthew Reever, Barbara Reever	Location: OPR, CA, 2017	Category: Civil
Case Type: Breach Of Contract	Status: Filed	Filed Date: 01/06/2022 12:00 AM CST	Lower Court/Agency #: Lower Court/Agency #
Lower Court/Agency Case #: Lower Court/Agency Case #	Judge:		

Envelope

Search Date: 01/10/2022 9:59 AM CST	Original Date: 01/10/2022 9:59 AM CST	Filing Status: OPR eFile Filing Interface
Filing Attorney: Andrew W Reever	Filed By: [REDACTED]	
Firm Name: Aarva Lawson and Associates	Firm Address: 5101 Terrington Parkway, Suite 5000 Ft. Worth, Texas 75234	Firm Phone: 972.913.3770
Fax Email: [REDACTED]@efiletech.com	Filer Type: Default	

1 Filings

Proposed Order	Filing Type: EFileAndServe	Reference Number:	Filing Description:
Status: Recipited	Filing Courtesy Copier	Filing Preliminary Notifications:	Review Date:
Filing Comments:			
Accept Comments:			

Documents

Component	Document Name	Description	Security	Download Version
Legal Document	RedactThisNew-1.pdf	RedactThisNew-1.pdf		Original [REDACTED]

Service

2 Party(s) with Service

Reever, Barbara L.

Reever, Matthew J.

Fees

Description of Fees and Amounts		Payment Information	
Proposed Order		Payment Account:	20200921
Filing Fee	\$0.00	Payment Type:	CreditCard
Total Fees	Filing Total \$0.00	Party Responsible for Fees:	Matthew J Reever
Total Filing Fees	\$0.00	Order ID:	000174257-0
Payment Service Fee	\$1.00	Transaction Amount:	\$3.00
E-File Fee	\$1.00	Transaction ID:	1486205
Court E-File Fee	\$1.00		
	Envelope Total \$3.00		

Figure 14.12 – Example of an Envelope Detail Page—Parent Envelope

- Click CHILD ENVELOPE to view the envelope details for the child envelope.

Envelope Detail

Case # CC-22-052 - Envelope # 174267 PARENT ENVELOPE PRINT CLOSE

Case

Case Number CC-22-052	Description Matthew Reever, Barbara Reever	Location ORS, OR, 2017	Category Child
Case Type Breach Of Contract	Status Filed	Filed Date 01/06/2022 12:00 AM CST	Lower Court/Agency #
Lower Court/Agency Case #	Judge		

Envelope

Submit Date 01/12/2022 12:56 PM CST	DocuSign Date 01/12/2022 12:56 PM CST	Filing Status ORS eSFP Filing Interface
Filing Agency Andrew W Reever	Filed By [REDACTED]	
Firm Name Tyler System Firm	Firm Address 5001 Tennyson Pkwy Plano, Texas 75024	Firm Phone 972-713-3770 ext11306
Filer Email [REDACTED]@tylersystem.com	Filer Type Default	

Filings 1 Filing(s)

Order	Filing Type	Reference Number	Filing Description
0001 Under Review	EFilixAndServe		
Filing Comments	Filing Country Copies	Filing Preliminary Notifications	Review Date

Judge Comments
Nothing that comments show up in filing details as expected in RCY 1206

Documents

Component	Document Name	Description	Security	Download Version
Lead Document	RedactThisNew 1.pdf	RedactThisNew 1.pdf		Original

Service 2 Party(s) with Service

Reever, Barbara L
Reever, Matthew J

Search by Party Name Search by Service Contact

2 Service Contact(s)
2 Service Contact(s)

Fees

Description of Fees and Amounts	Payment Information																		
<table border="1"> <tr> <td>Order</td> <td></td> </tr> <tr> <td>Filing Fee</td> <td>\$0.00</td> </tr> <tr> <td>Filing Total</td> <td>\$0.00</td> </tr> <tr> <td>Total Fees</td> <td></td> </tr> <tr> <td>Total Filing Fees</td> <td>\$0.00</td> </tr> <tr> <td>Envelope Total</td> <td>\$0.00</td> </tr> </table>	Order		Filing Fee	\$0.00	Filing Total	\$0.00	Total Fees		Total Filing Fees	\$0.00	Envelope Total	\$0.00	<table border="1"> <tr> <td>Payment Account</td> <td>SSBP-041TheWV Update 43 Update</td> </tr> <tr> <td>Payment Type</td> <td>Waiver</td> </tr> <tr> <td>Party Responsible for Fees</td> <td>Matthew J Reever</td> </tr> </table>	Payment Account	SSBP-041TheWV Update 43 Update	Payment Type	Waiver	Party Responsible for Fees	Matthew J Reever
Order																			
Filing Fee	\$0.00																		
Filing Total	\$0.00																		
Total Fees																			
Total Filing Fees	\$0.00																		
Envelope Total	\$0.00																		
Payment Account	SSBP-041TheWV Update 43 Update																		
Payment Type	Waiver																		
Party Responsible for Fees	Matthew J Reever																		

Figure 14.13 – Example of an Envelope Detail Page—Child Envelope

- Click **PARENT ENVELOPE** to return to the envelope details for the parent envelope.
- Click **PRINT** if you want to print the envelope details. Then, click **CLOSE** to return to the envelope you were reviewing.

15 Tyler Technologies Technical Support Contact Information

For assistance, contact Tyler Technologies through the following resources.

Resource	Contact Information
eFile & Serve Support Hours	7:00 a.m. to 9:00 p.m. (CT), Monday through Friday
eFile & Serve Support Chat	Assistance is also available online through Support Chat .
eFile & Serve Email	efiling.support@tylertech.com
eFile & Serve Telephone	800.297.5377
GoTo Assist (Support)	Support may ask to assist you by sharing your screen, using GoToAssist .