eFile & Serve Review Queue User Guide

Release 2025.1

Copyright and Confidentiality

Publishing History

Document Publication Number	Revision	Date	Changes Made
ESO-FS-200-4987 v.1	Initial	October 2022	Document creation based on 2022.7 documentation and Tyler rebranding.
ESO-FS-200-4987 v.2	Second	July 2024	The following changes were made: • 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
			• Added the “Abort Search” topic. • Added the “Grace Period” section. • Updated the “Viewing Envelope Details from the Review Queue Page” topic. • Updated the “Viewing Service Contacts from the Review Queue Page” topic. • Updated the “Viewing the Action History from the Review Queue Page” topic. • Updated the “Summary Information” topic. • Added the “Search for Case” section. • Added the “Multiple Parties Responsible for Fees” section. • Updated the “Fees and Payment Information” topic. • Updated the “Viewing Criminal Case Information” topic. • Added the “Viewing Citation Information” topic. • Updated the “Document Viewer 1” chapter. • Updated the “Redaction” topic. • Added the “Document Viewer 2” chapter. • Updated the “Filing Actions” chapter. • Updated the “Review History” chapter. • Added the “Viewing Refunded and Voided Fees from the Review History Page” topic.

Document Publication Number	Revision	Date	Changes Made
			• Updated the "Viewing Envelope Details from the Envelope Lookup Page" topic. • Updated the "Viewing Service Contacts from the Envelope Lookup Page" topic. • Updated the "Viewing the Action History from the Envelope Lookup Page" topic. • Added the "Viewing Refunded and Voided Fees from the Envelope Lookup Page" topic. • Throughout — Replaced the examples of the *Court Admin* page. • Updated the "Court Administrator" chapter. • Added the "Audit Log" section. • Updated the "Unlocking a Batch Envelope" topic. • Added the "Expunge Individual Cases" and the "Expunging a Case" topics. • Added the "Notification Admin Page" chapter. • Added the "Queue Notifications" topic.
ESO-FS-200-4987 v.3	Third	January 2025	The following changes were made: • Revised the description of the Court Administrator functions in the "Court Administrator" chapter. • Updated the screen shots in the "Court Administrator" chapter. • Added information about the "Restart Batch" process. • Added information about the "Protect Case" feature.

Contents

List of Figures

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 `Boston` in the **City** field. Run the `tables.sql` script for the `jcpBasketB` database.
Italics	Page and dialog box names Document titles Variable data to be replaced by an appropriate value	Return to the *Home* page. Refer to the *Navigation Guide*. Type the *filename*.
“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

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

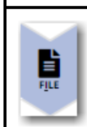
Before you begin to work in the eFile & Serve Review Queue, review the information in this section to successfully use the software.

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

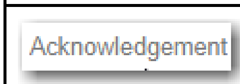
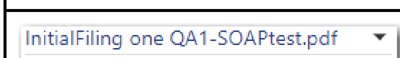
Tab	Description	Location In the Document
	Click the **Fees** tab to open the Fees and Payment Information pane.	Fees and Payment Information, page 102
	Click the **Charge** tab to view the charges information for the specified case. **Note: The Charge tab is displayed only when the case in the envelope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

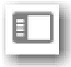
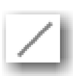
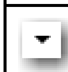
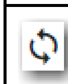
Other Icons

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: • *Review Queue* page • *Review History* page • *Envelope Lookup* 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 *Review Queue* page.

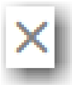
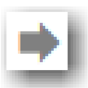
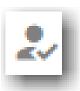
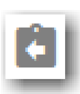
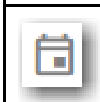
Document Viewer 1 Pane

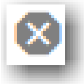
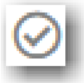
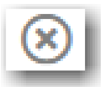
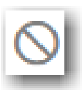
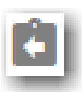
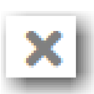
Note: The icons in the following table are only found in Viewer 1. Refer to Document Viewer 2, page 121 for descriptions of the icons that are found in Viewer 2.

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 *Redaction Viewer* 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

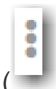
Icon/Field Name	Description	Location In the Document
	Click the Accept icon to open the *Accept Filing* dialog box. **Note: This feature is configured by Tyler and may not be available in your application.**	Accepting a Filing, page 140
	Click the Return icon to open the *Return Filing* dialog box. **Note: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

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

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.

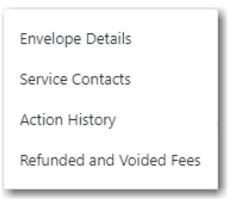
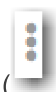


Figure 2.1 – Example of an Action Menu

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

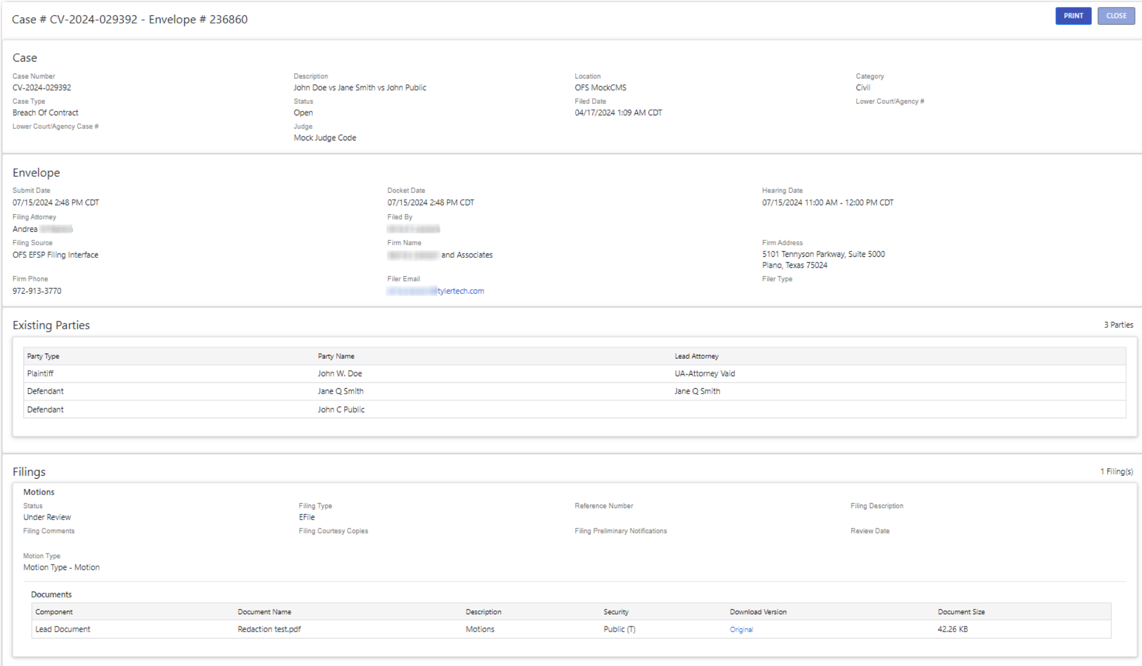


Figure 2.2 – Example of an Envelope Detail Page

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.

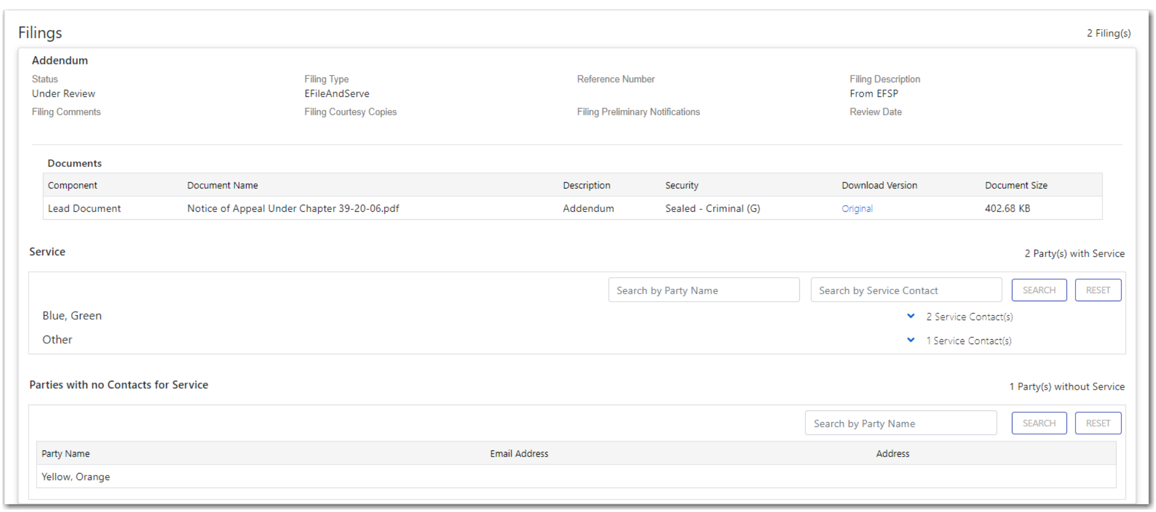


Figure 2.3 – Example of the Filings Section in the Envelope Details

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

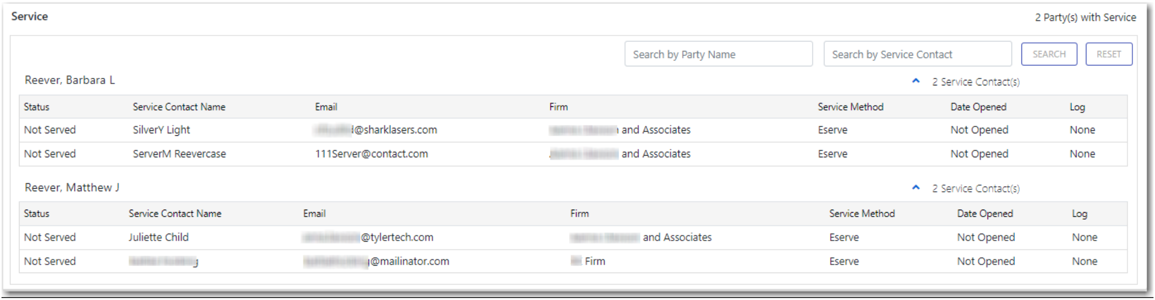


Figure 2.4 – Example of the Service Section with the Service Contacts Displayed

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.

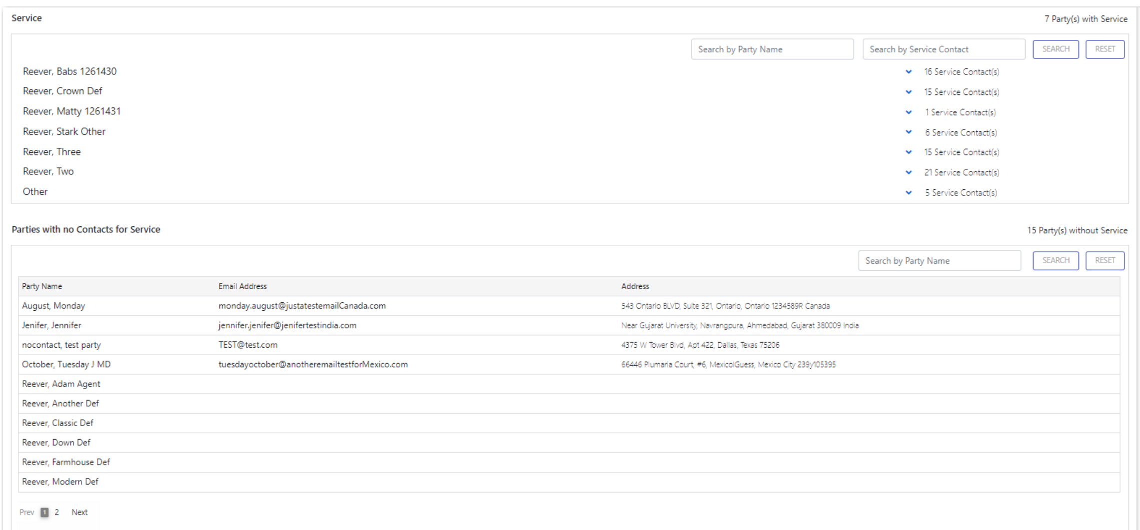


Figure 2.5 – Example of the Service Section with the Parties with no Contacts for Service Displayed

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

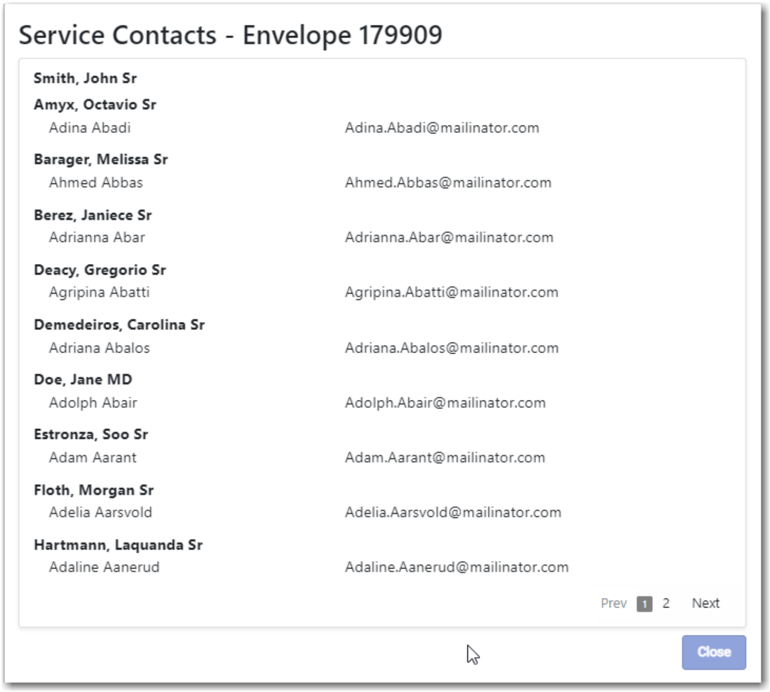


Figure 2.6 – Example of a Service Contacts Window

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

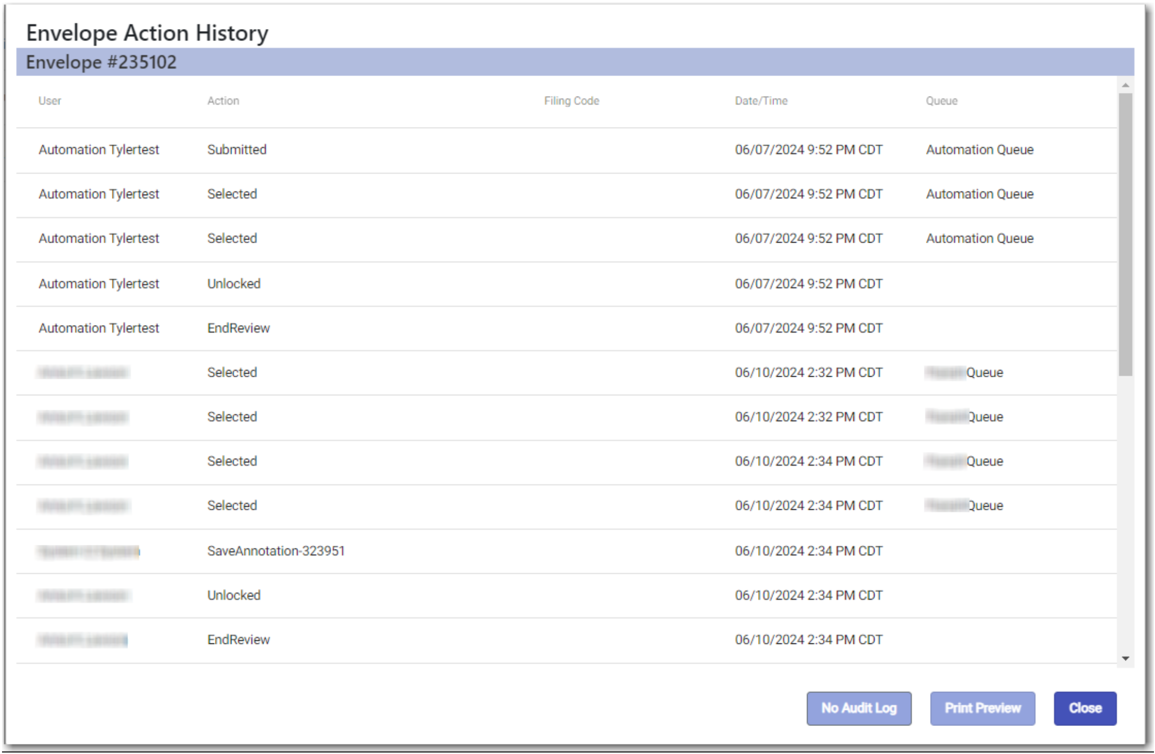


Figure 2.7 – Example of an Envelope Action History Window

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.

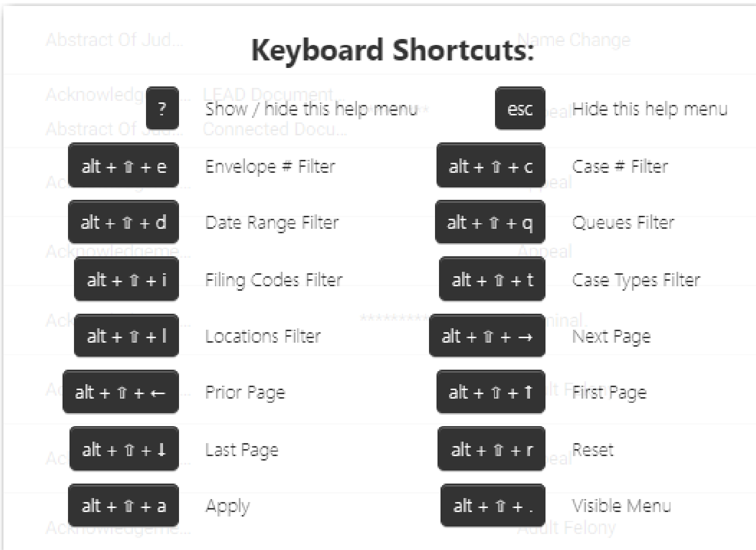


Figure 2.8 – Keyboard Shortcuts on the Review Queue Page

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

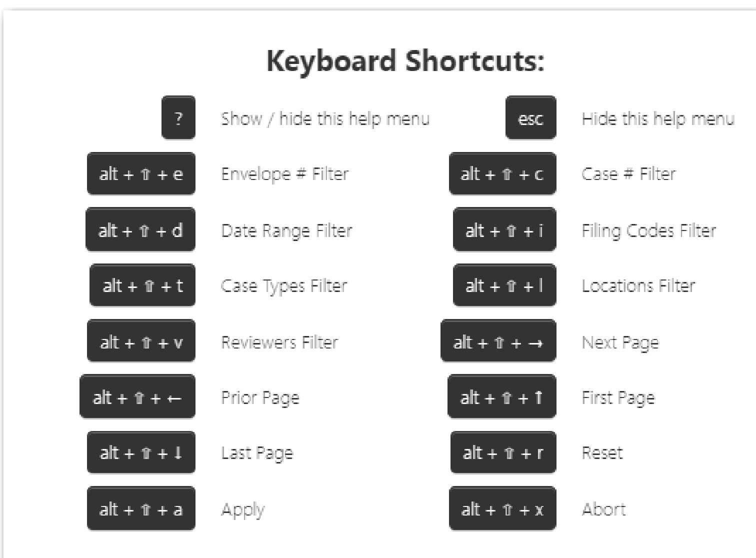


Figure 2.9 – Keyboard Shortcuts on the Review History Page

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

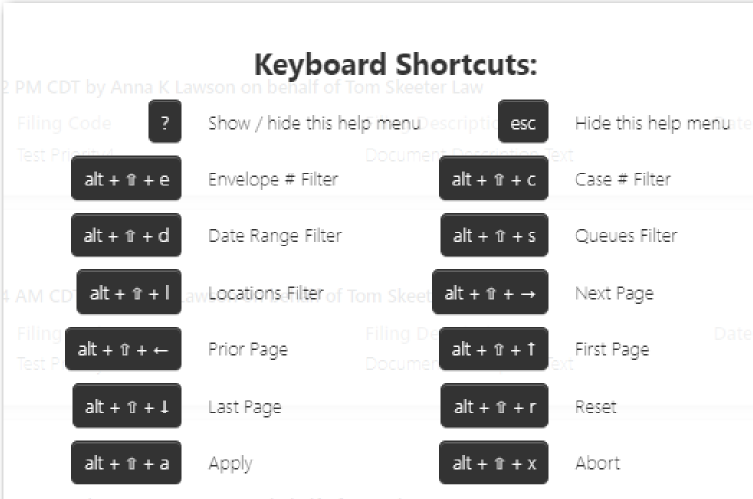


Figure 2.10 – Keyboard Shortcuts on the Envelope Lookup Page

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

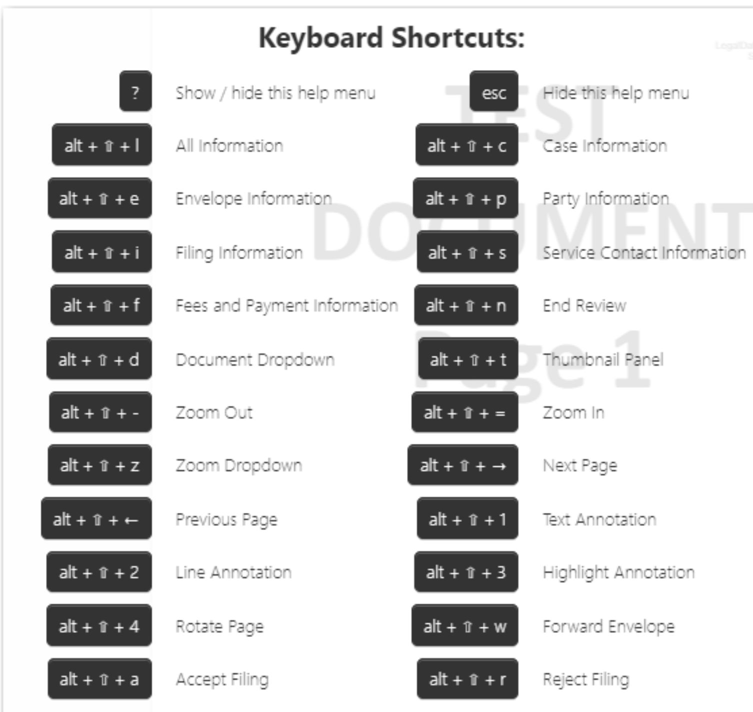


Figure 2.11 – Keyboard Shortcuts During an Envelope Review

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.

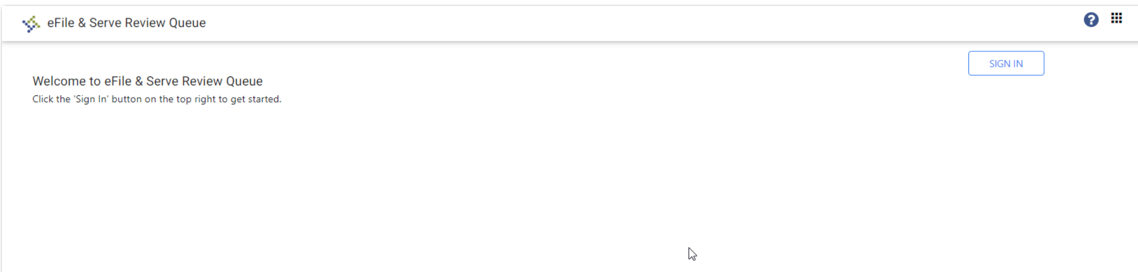


Figure 3.1 – eFile & Serve Review Queue Landing Page

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.

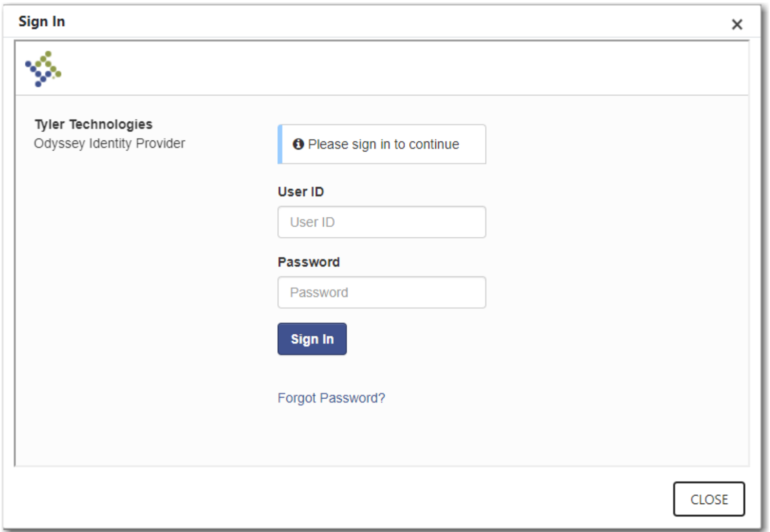


Figure 3.2 – Example of a Sign In Window

> **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 

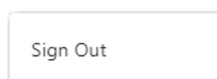
.

   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 

.

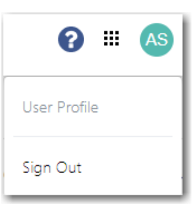


Figure 3.3 – Sign Out Drop-Down List

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.

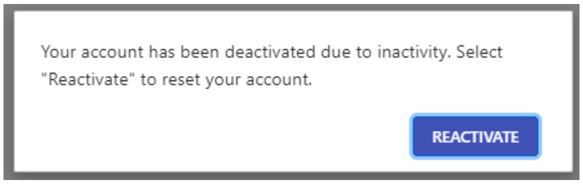


Figure 3.4 – Example of a Message for a Deactivated Account

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.

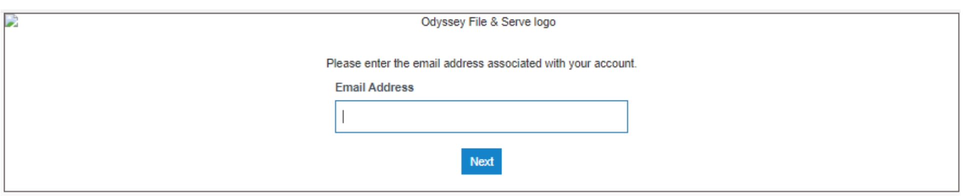


Figure 3.5 – Example of the Password Reset Window

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

   The *reCAPTCHA* window is displayed.

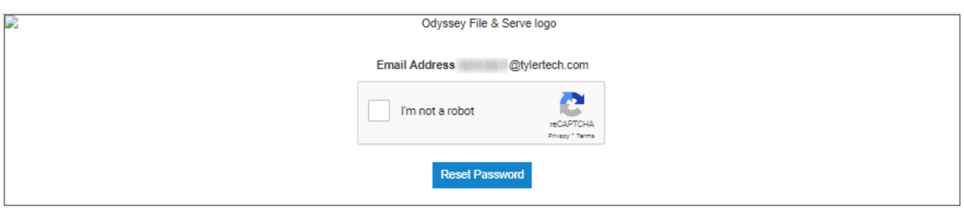


Figure 3.6 – Example of the reCAPTCHA Window

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.

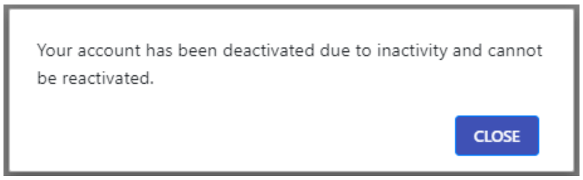


Figure 3.7 – Example of a Suspended Account Message

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.

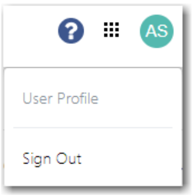


Figure 4.1 – Example of a Drop-Down List

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.

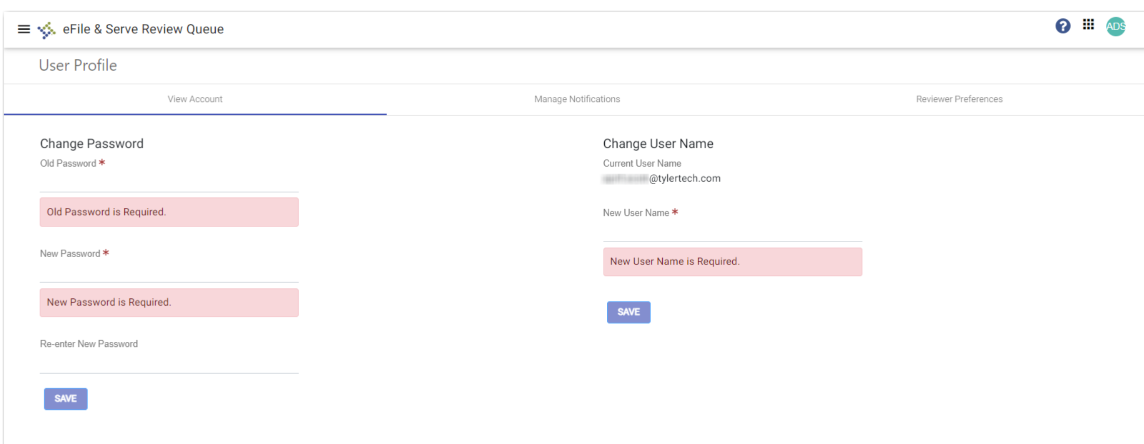


Figure 4.2 – Example of the View Account Tab on the User Profile Page

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

Manage Notifications Tab

You can manage your preferences for notifications regarding your filings.

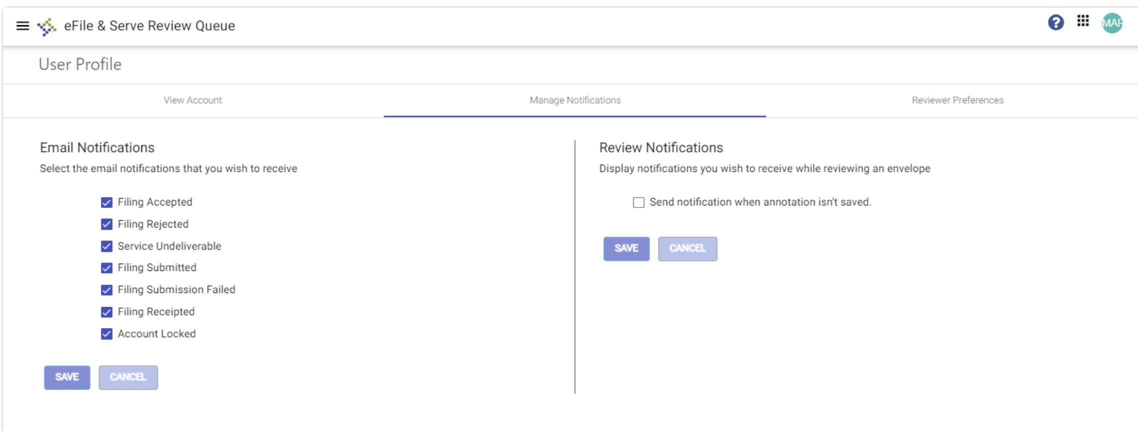


Figure 4.3 – Example of the Manage Notifications Tab on the User Profile Page

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 **SAVE**.
- 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 **SAVE**.

  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.

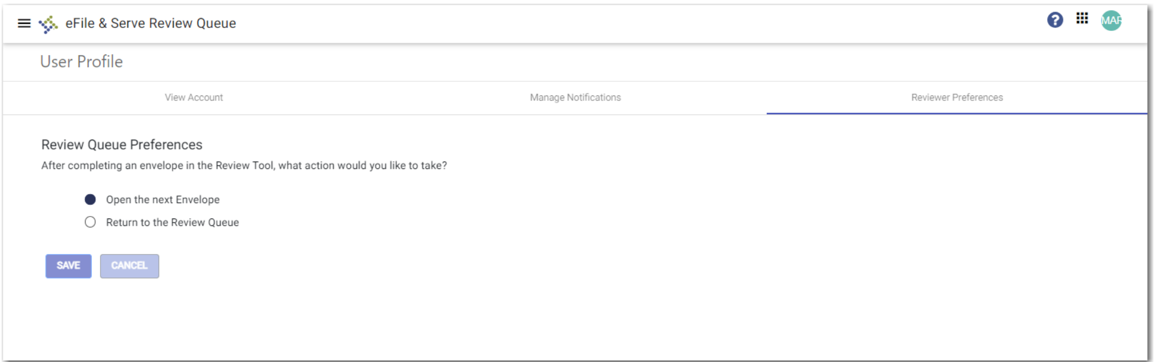


Figure 4.4 – Example of the Reviewer Preferences Tab on the User Profile Page

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

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

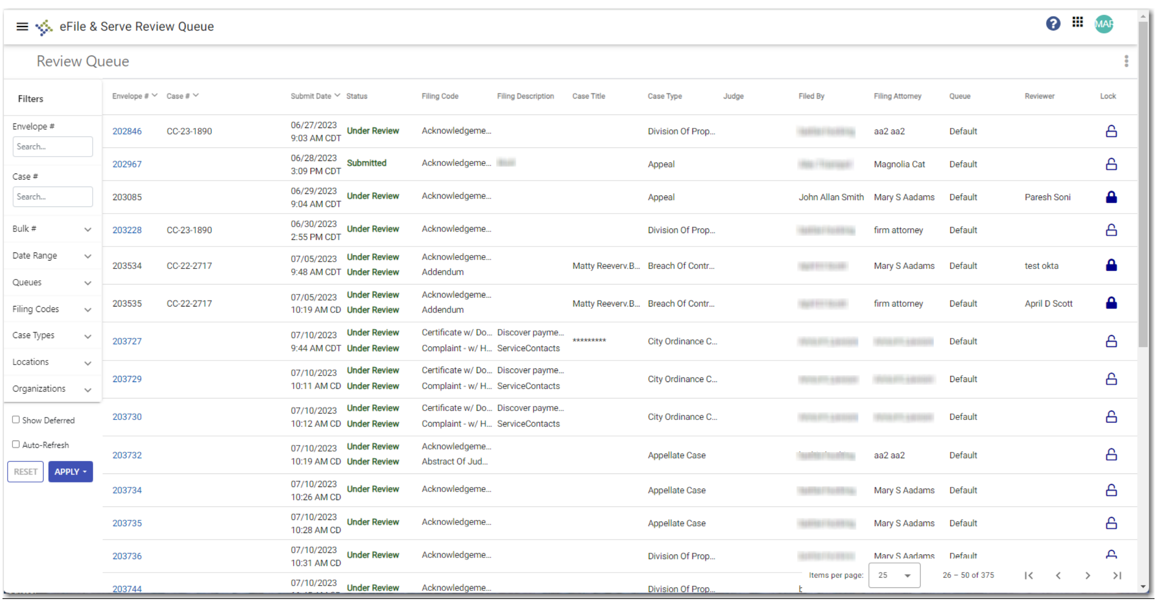


Figure 5.1 – Example of the Review Queue Page

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 RESET.

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.

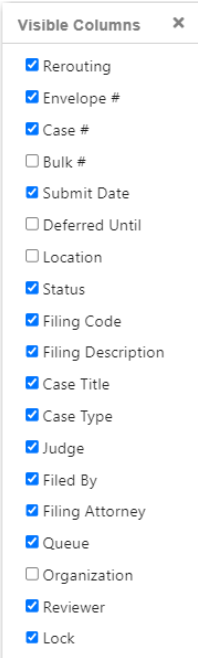
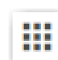


Figure 5.2 – Visible Columns Drop-Down List

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.

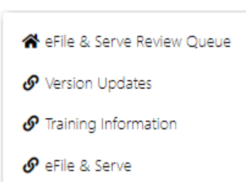


Figure 5.3 – Example of a Menu of Available Application Links

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.

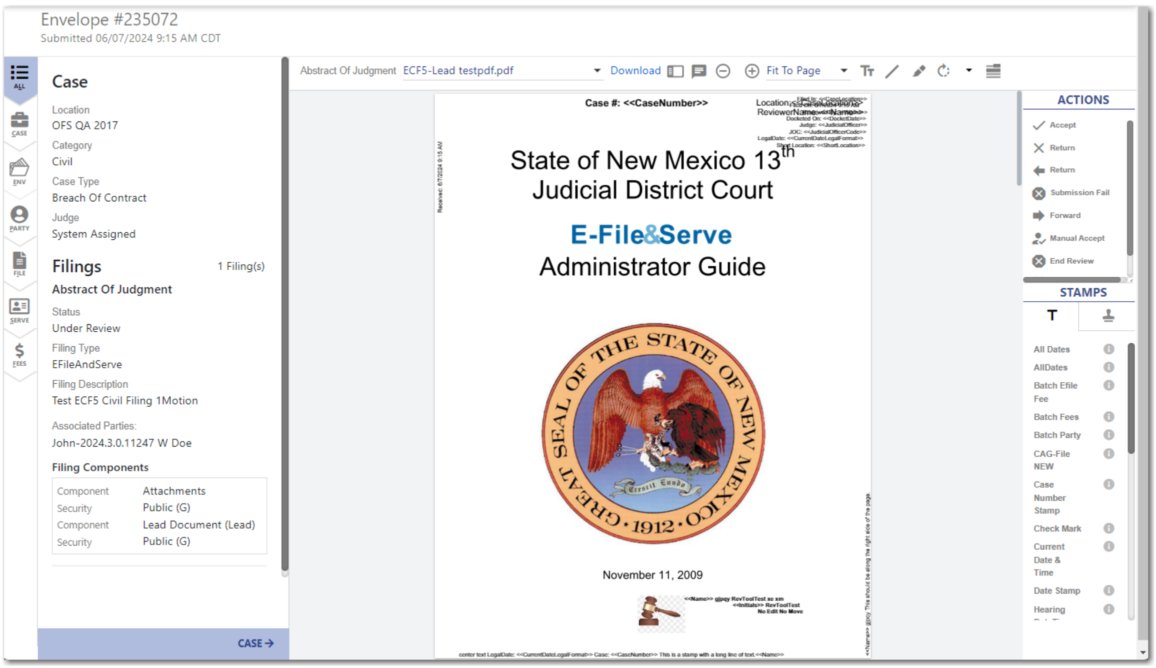


Figure 5.4 – Example of an Envelope in Review

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.

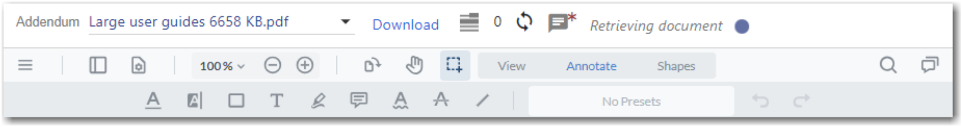


Figure 5.5 – Example of the Large Document Message During the Document Retrieval

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

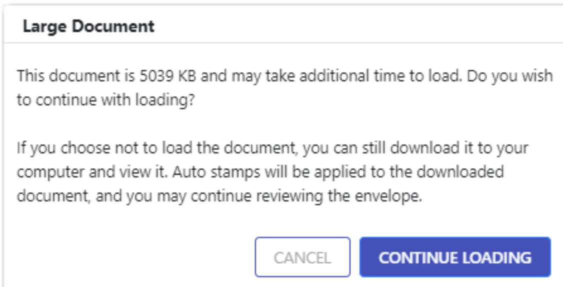


Figure 5.6 – Example of the Large Document Window

To continue with the document download, click 

.

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

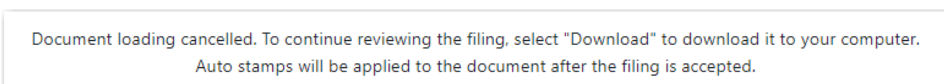


Figure 5.7 – Example of a Document Loading Cancellation Message

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.

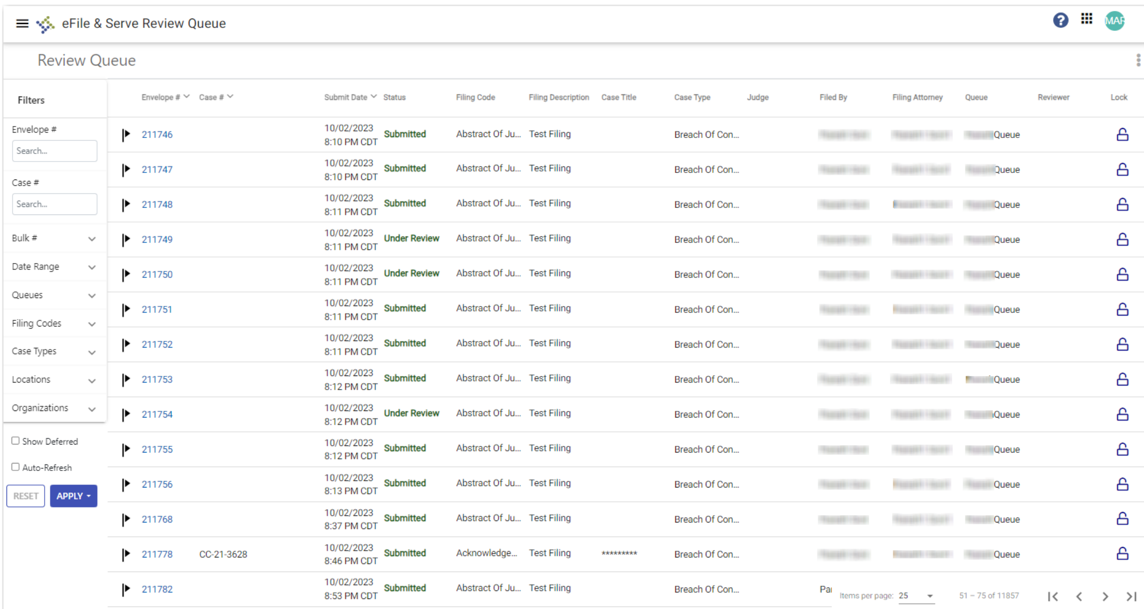


Figure 5.8 – Example of a Review Queue Page with Prioritization Icons Displayed

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.

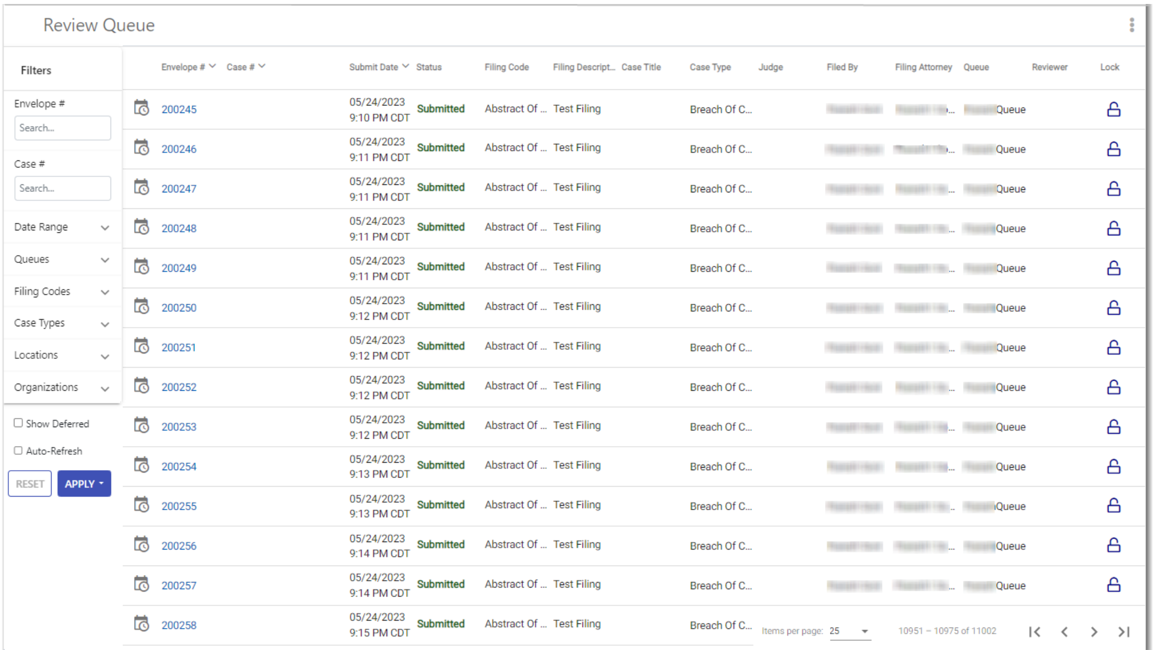


Figure 5.9 – Example of a Review Queue Page with Timer Icons Displayed

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.

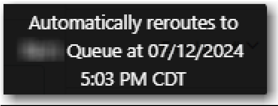


Figure 5.10 – Example of a Tooltip for an Envelope Scheduled for Rerouting

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.

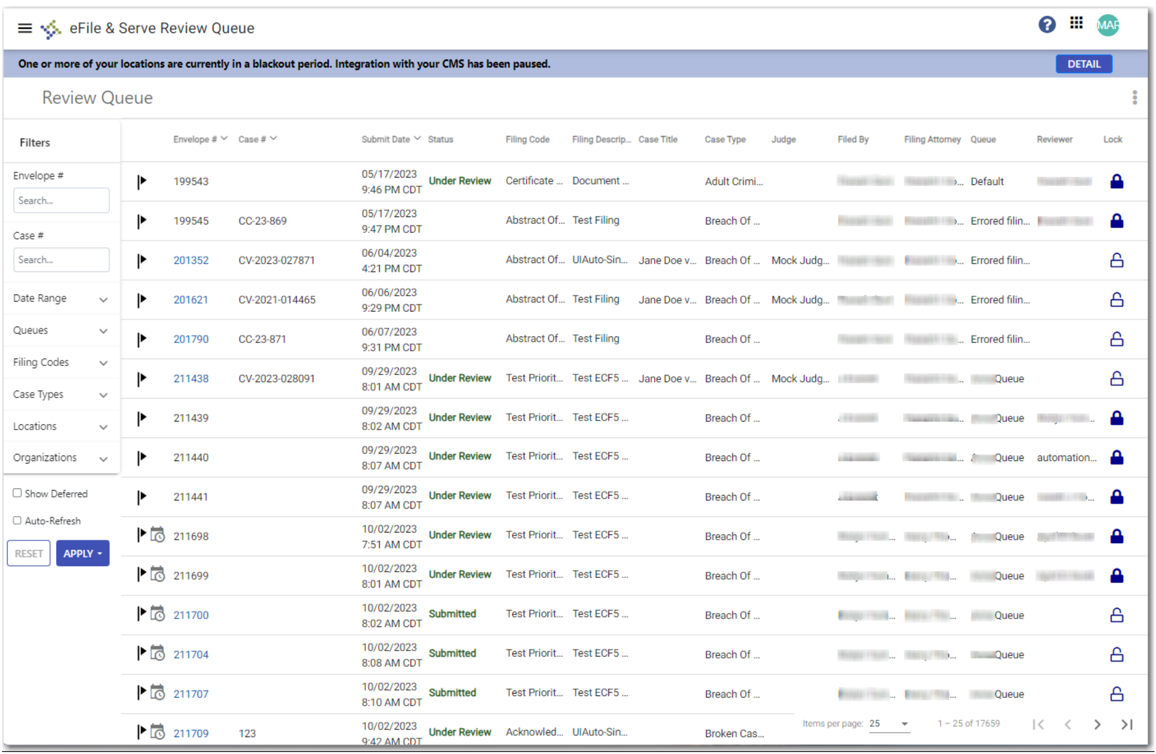


Figure 5.11 – Example of the Review Queue Page with the Blackout Period Notification Displayed

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.

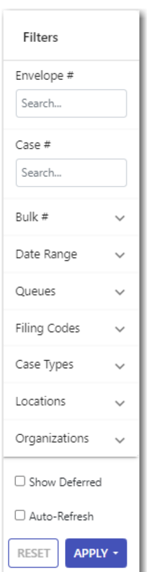


Figure 5.13 – Example of a Filters Pane

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.

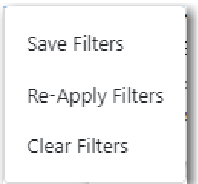


Figure 5.14 – Apply Action Menu

Note: To clear all selected filters, click 

.

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

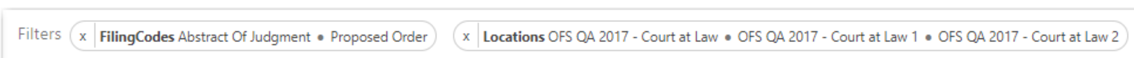


Figure 5.15 – Example of Applied Filters on the Review Queue Page

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

.

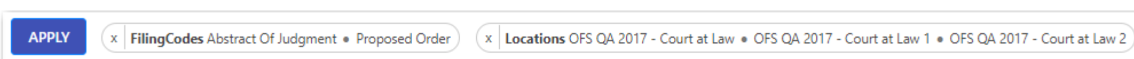


Figure 5.16 – Example of Applied Filters with the Apply Button Displayed

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.

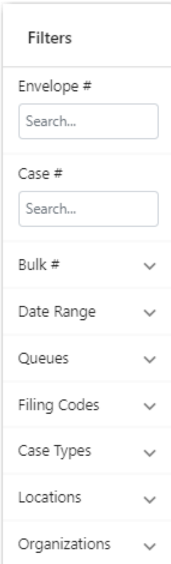


Figure 5.17 – Envelope # Pane in the Filters Pane

3. Click 

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

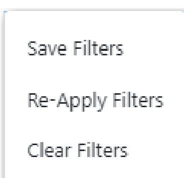


Figure 5.18 – Apply Action Menu

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.

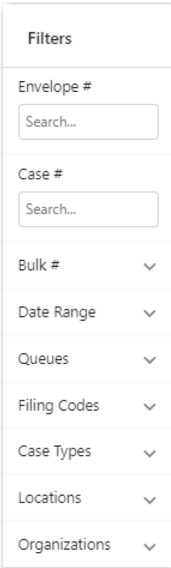


Figure 5.19 – Case # Pane in the Filters Pane

3. Click 

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

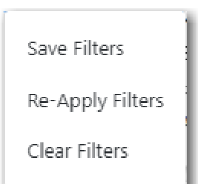


Figure 5.20 – Apply Action Menu

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.

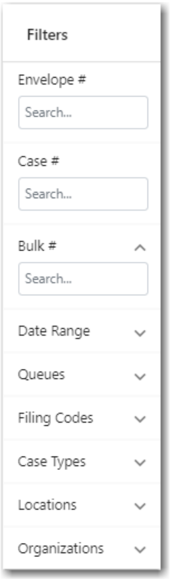


Figure 5.21 – Bulk # Pane in the Filters Pane

3. Click 

.

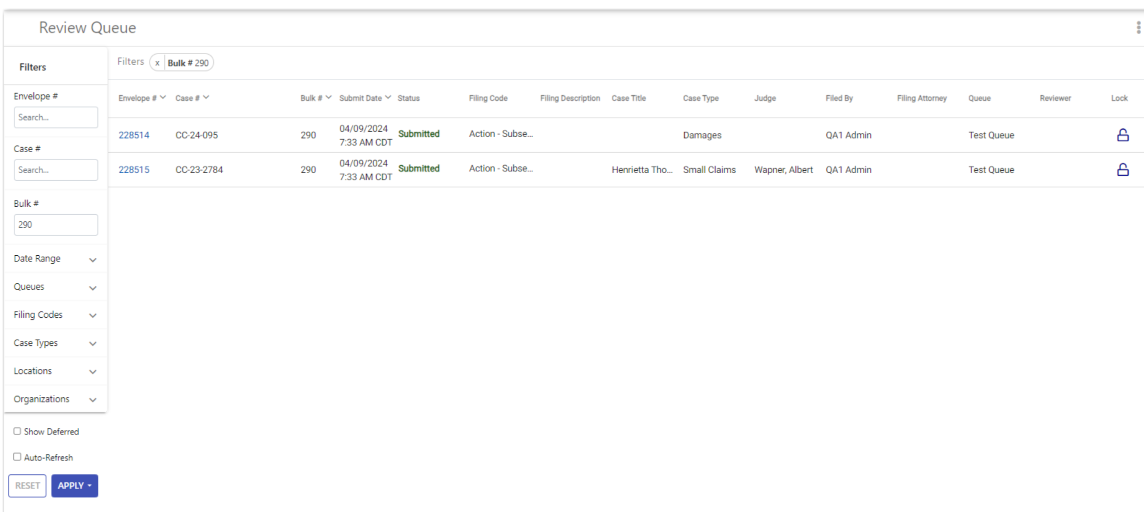


Figure 5.22 – Example of the Review Queue Page with the Bulk Filter Enabled

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

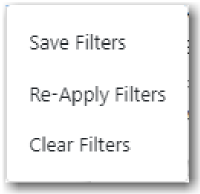


Figure 5.23 – Apply Action Menu

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.

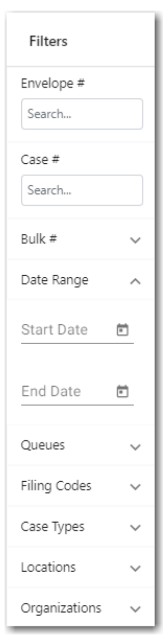


Figure 5.24 – Filters Pane with Date Range

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

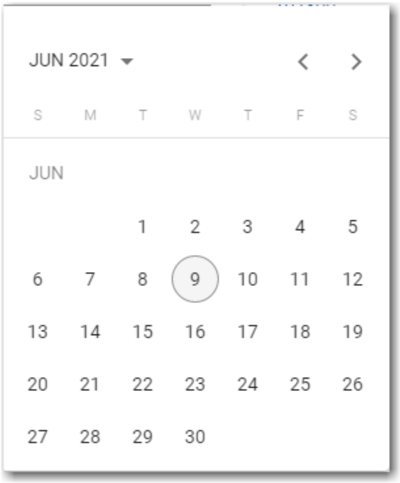


Figure 5.25 – Example of the Calendar

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

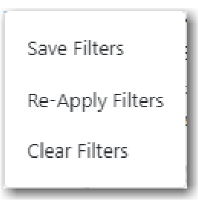


Figure 5.26 – Apply Action Menu

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.

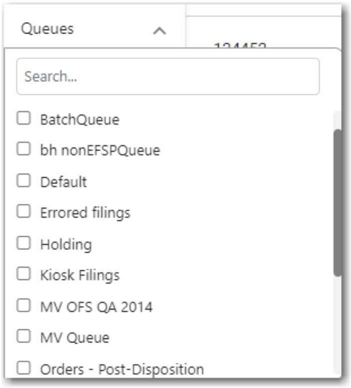


Figure 5.27 – Example of a Queues Drop-Down List in the Filters Pane

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.

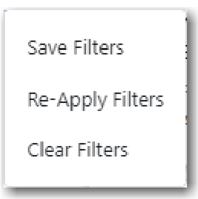


Figure 5.28 – Apply Action Menu

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.

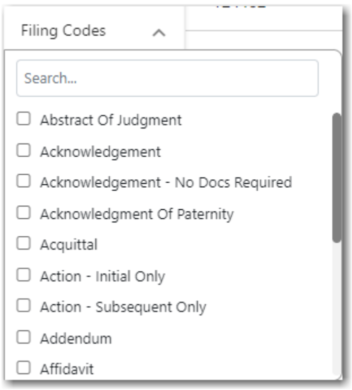


Figure 5.29 – Example of a Filing Codes Drop-Down List

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.

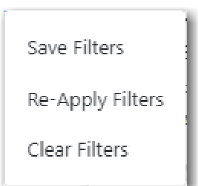


Figure 5.30 – Apply Action Menu

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.

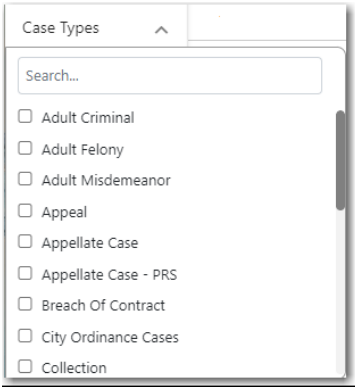


Figure 5.31 – Example of a Case Types Drop-Down List in the Filters Pane

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.

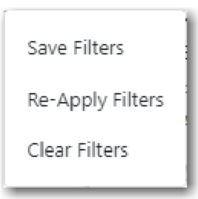


Figure 5.32 – Apply Action Menu

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.

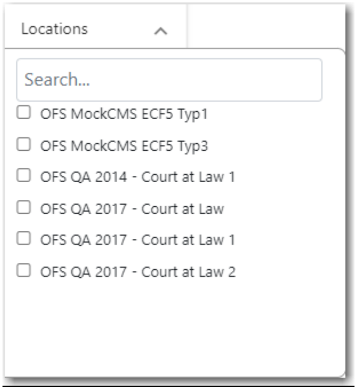


Figure 5.33 – Example of a Locations Drop-Down List in the Filters Pane

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

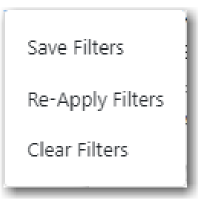


Figure 5.34 – Apply Action Menu

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:

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

Figure 5.35 – Show Deferred Check Box

3. Click 

.

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

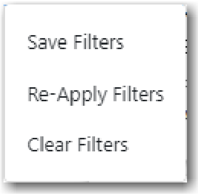


Figure 5.36 – Apply Action Menu

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.

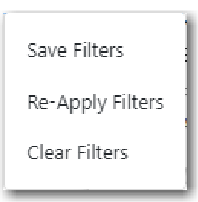


Figure 5.37 – Apply Action Menu

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 

.

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.

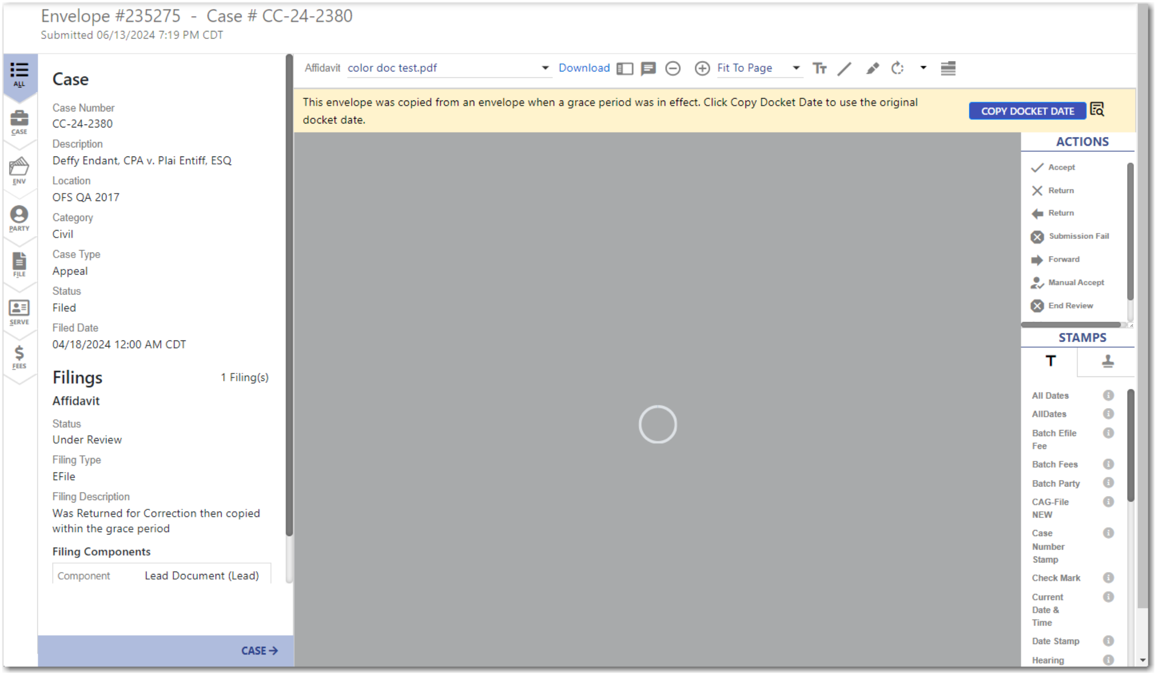


Figure 5.38 – Example of an Envelope Copied During the Grace Period

3. Click **COPY DOCKET DATE**.

   A confirmation message is displayed.

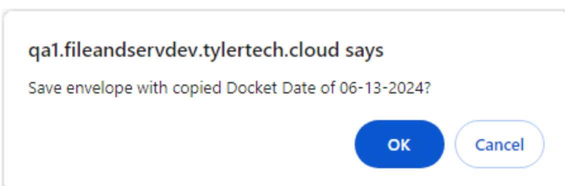


Figure 5.39 – Example of a Docket Date Confirmation Message

   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.

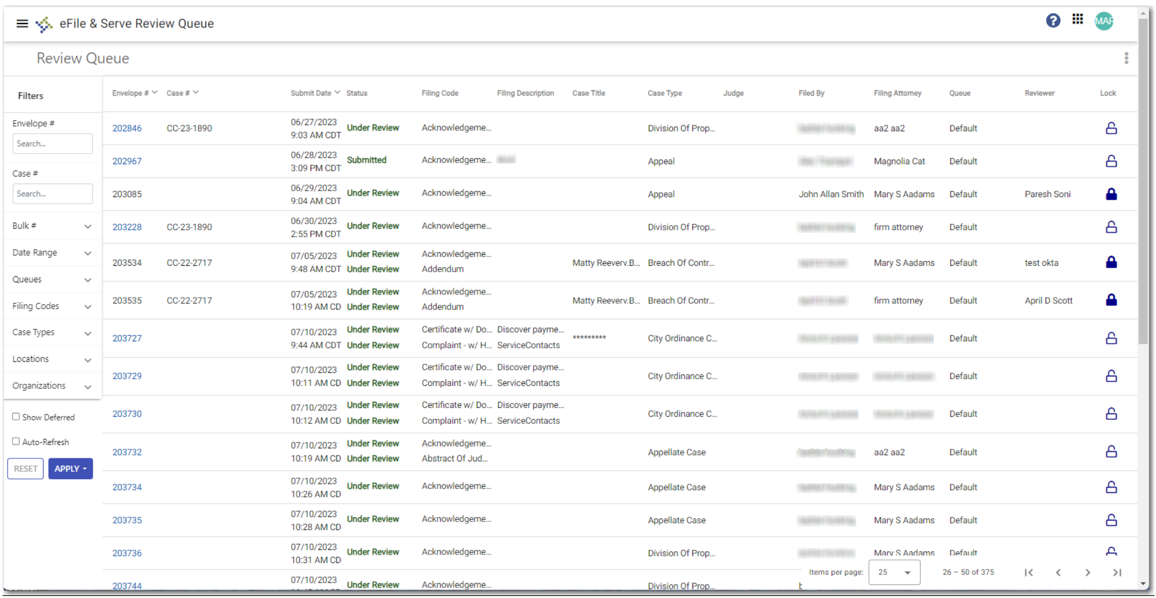


Figure 5.40 – Example of a Review Queue Page

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.

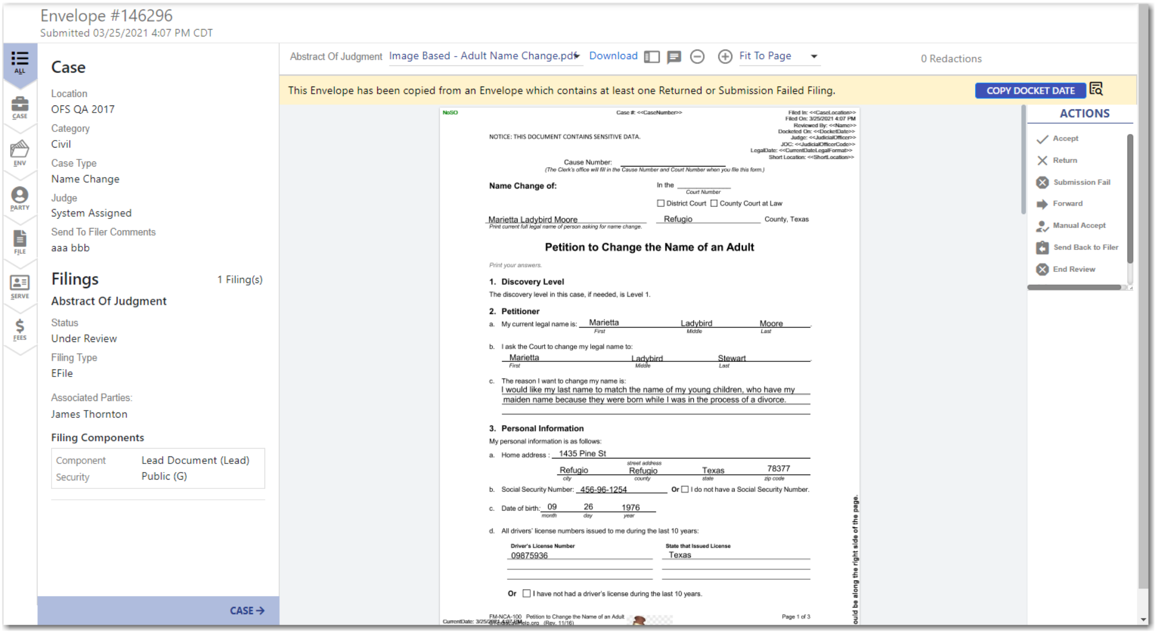


Figure 5.41 – Example of a Copied Envelope Under Review

4. Click 

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.

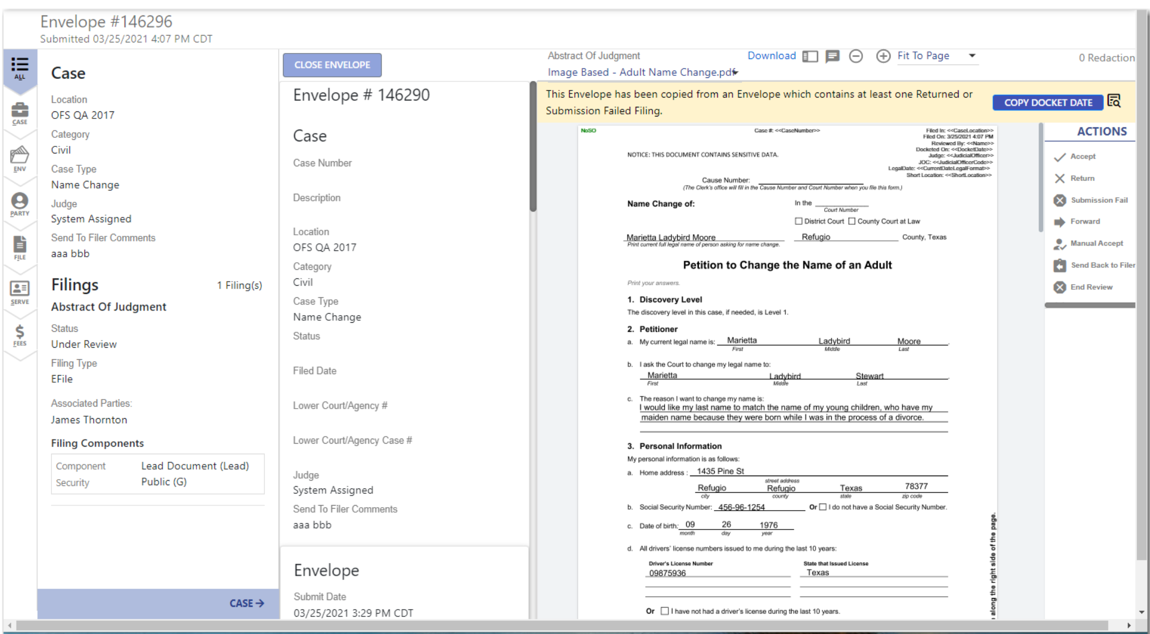


Figure 5.42 – Example of a Copied Envelope and the Original Envelope Information

6. Click 

when you are done viewing the original envelope information.

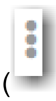
7. Continue with your review of the copied envelope.

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.

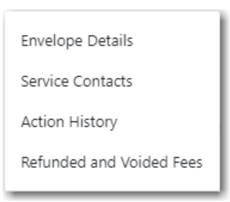


Figure 5.43 – Example of an Action Menu

   The *Envelope Detail* page is displayed.

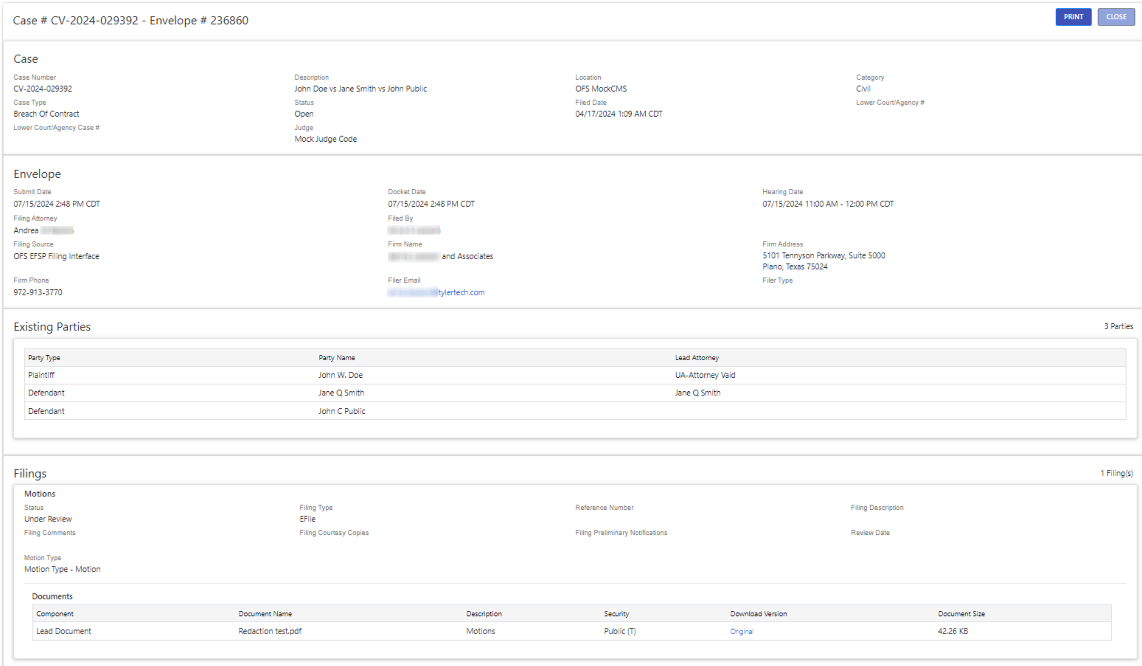


Figure 5.44 – Example of an Envelope Detail Page

3. Click 

if you want to print the envelope details. Then, click 

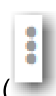
to return to the *Review Queue* page.

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.

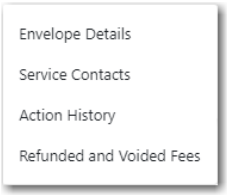


Figure 5.45 – Example of an Action Menu

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

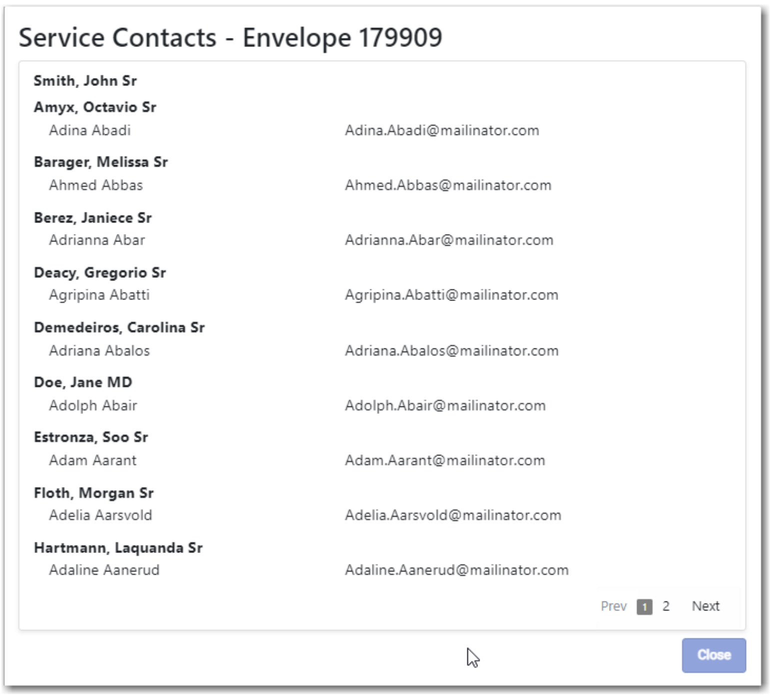


Figure 5.46 – Example of a Service Contacts Window

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.

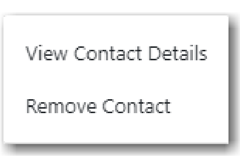


Figure 5.47 – Example of a Service Contact Action Menu

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.

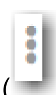
Figure 5.48 – Example of a Service Contact Details Window

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.

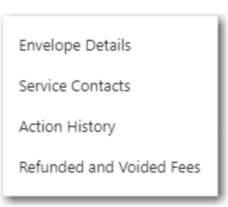


Figure 5.49 – Example of an Action Menu

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

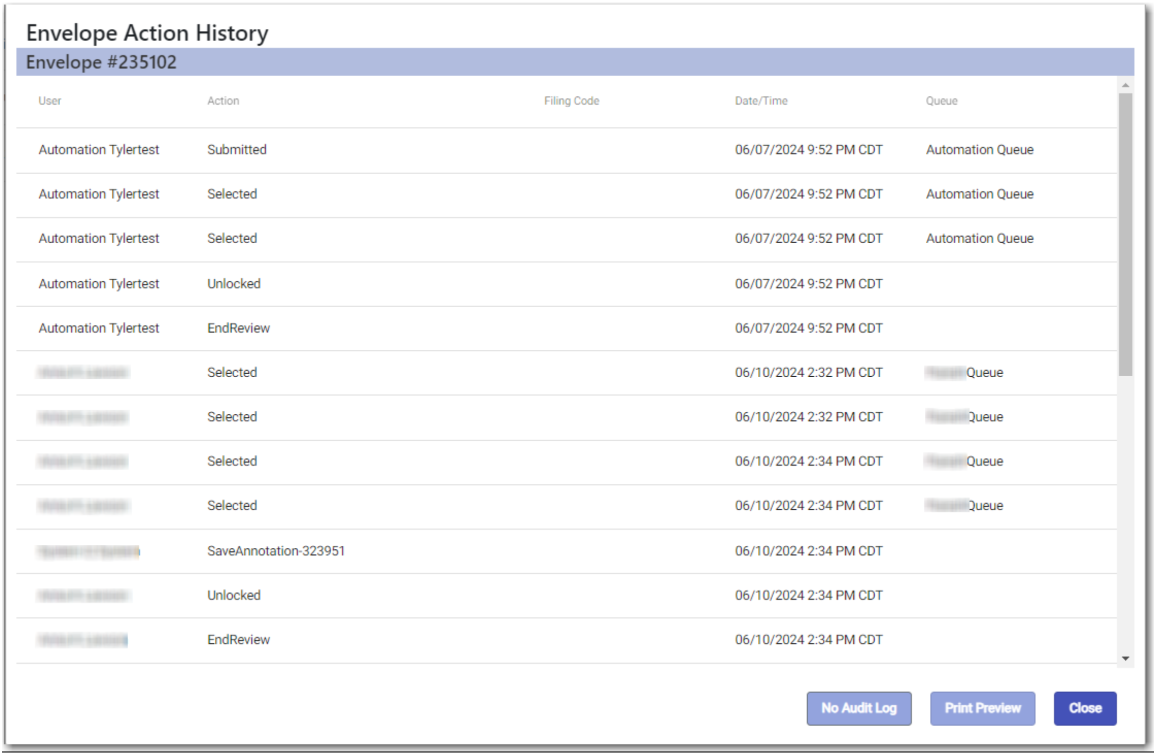


Figure 5.50 – Example of an Envelope Action History Window

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.

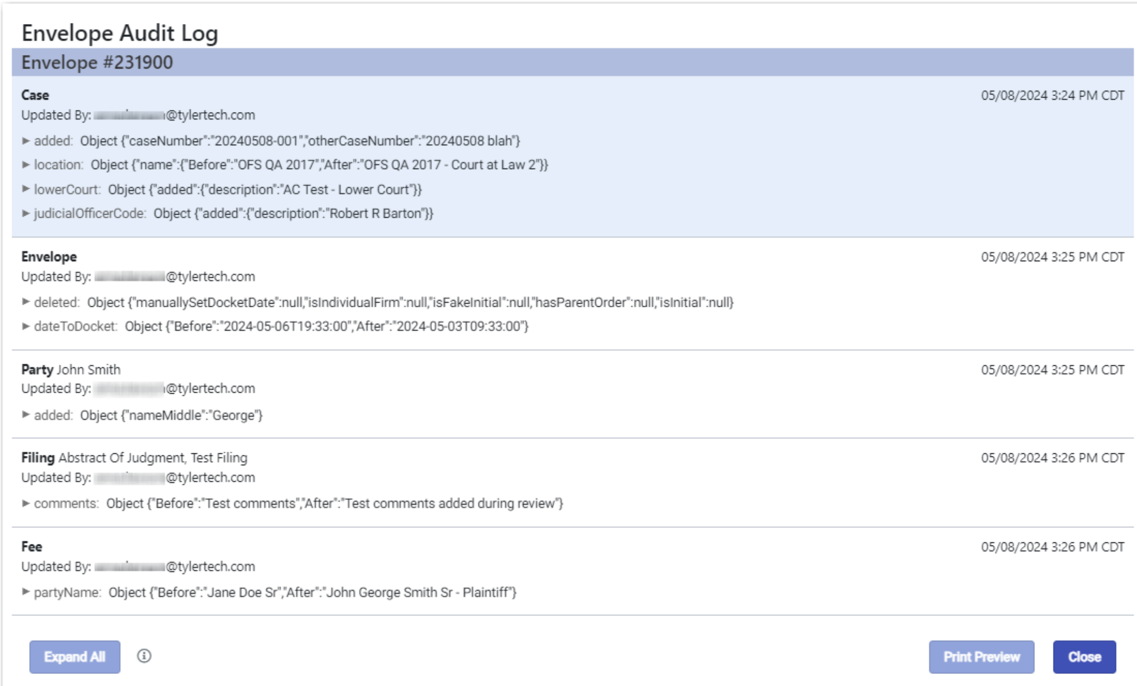


Figure 5.51 – Example of an Envelope Audit Log Window

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

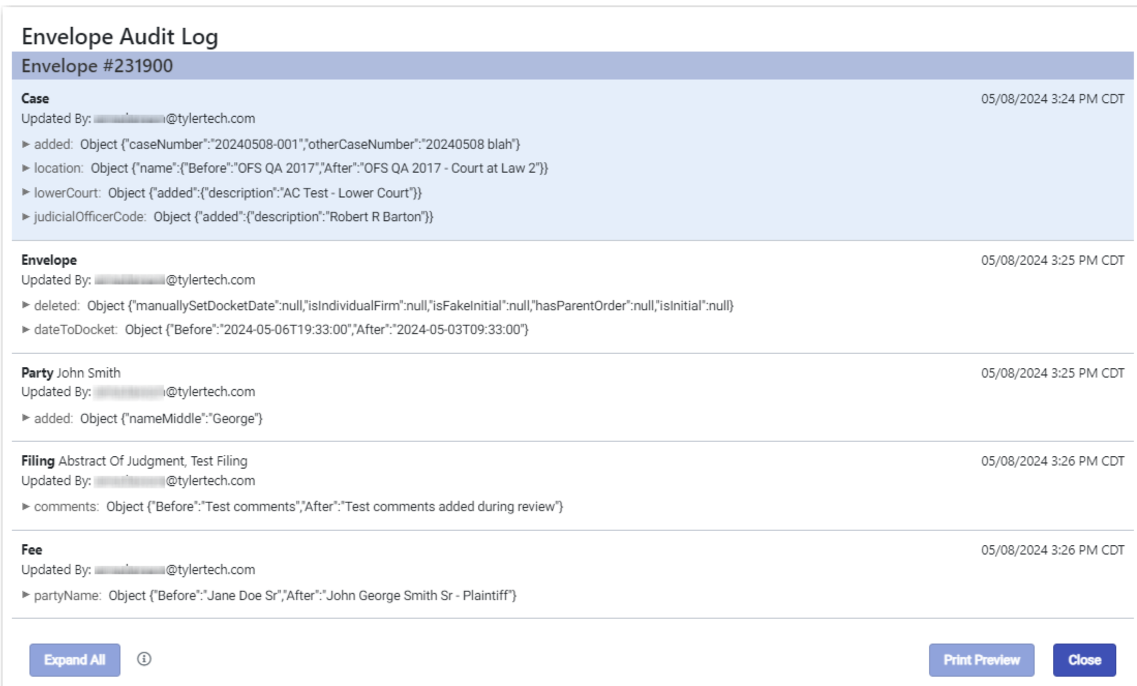


Figure 5.52 – Example of an Envelope Audit Log Window

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

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.

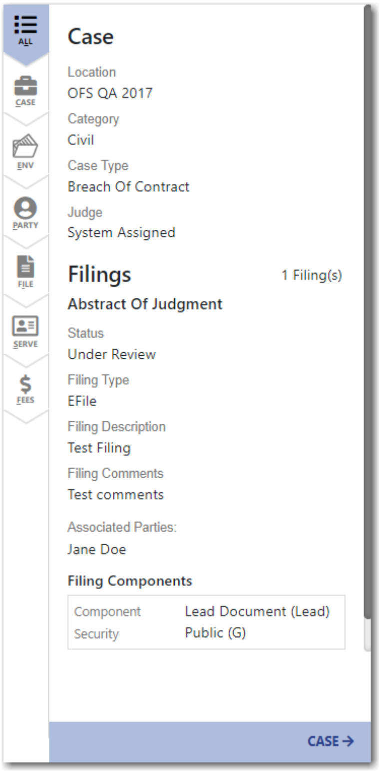


Figure 6.1 – All Tab

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.

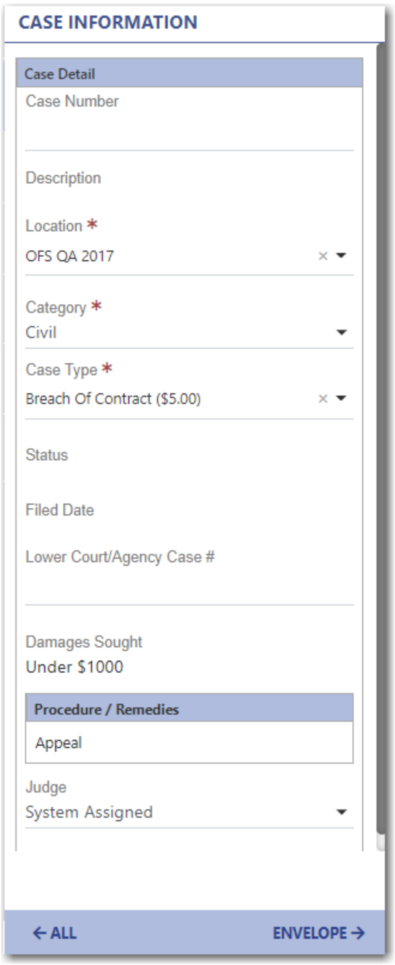


Figure 6.2 – Example of a Case Information Pane

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.

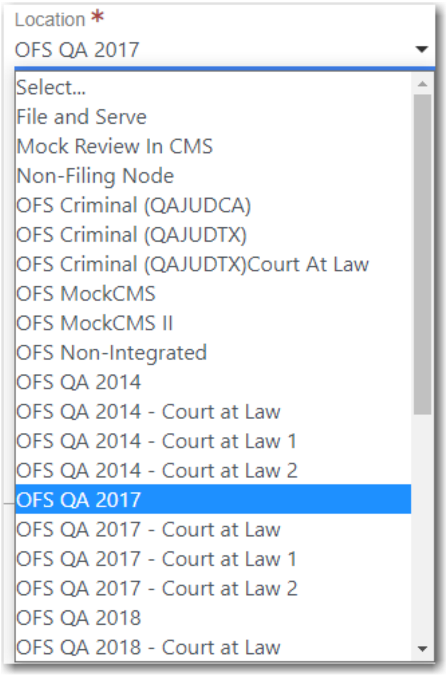


Figure 6.3 – Example of a Location Drop-Down List

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

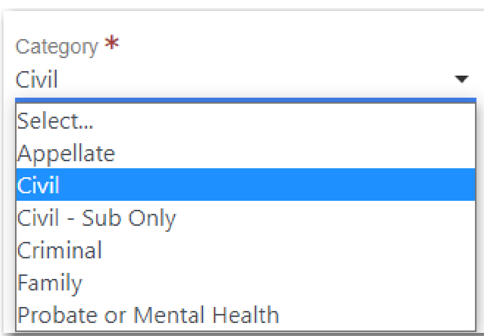


Figure 6.4 – Example of a Category Drop-Down List

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

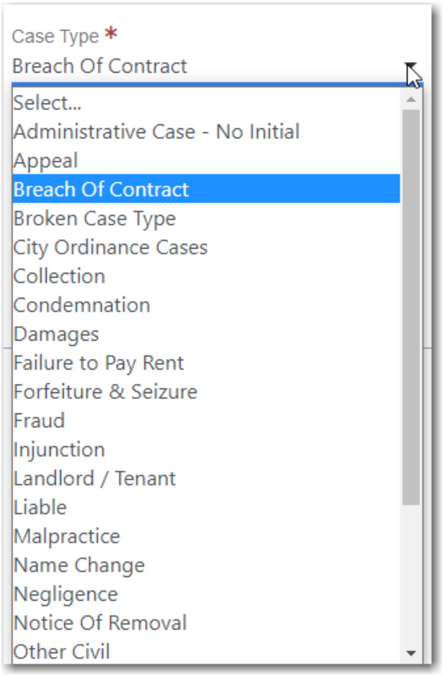


Figure 6.5 – Example of a Case Type Drop-Down List

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.

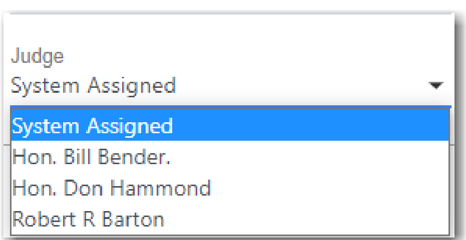


Figure 6.6 – Judge Drop-Down List

Click 

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.

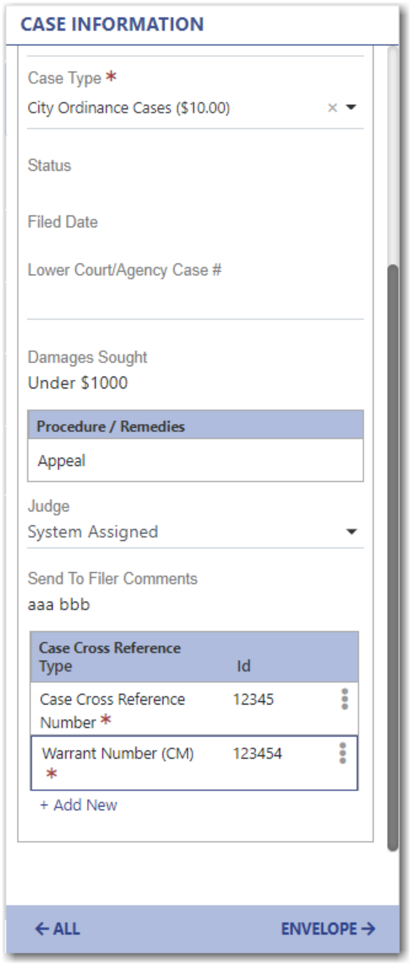


Figure 6.7 – Case Cross Reference Type Pane Displayed in the Case Information Pane

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.

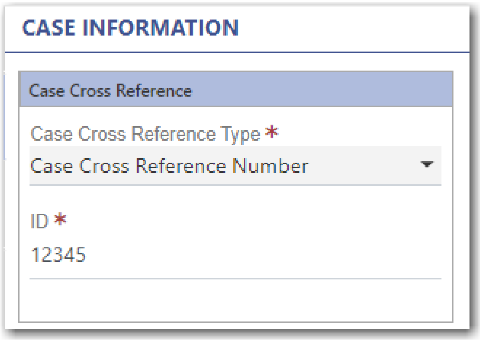


Figure 6.8 – Case Cross Reference Information in the Case Information Pane

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.

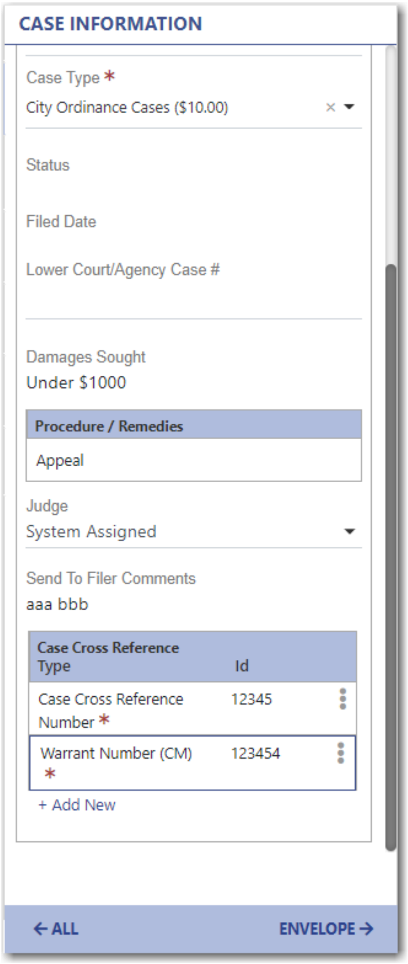


Figure 6.9 – Case Cross Reference Type Pane Displayed in the Case Information Pane

2. In the Case Cross Reference Type pane, click 

.

   The *Case Cross Reference* window is displayed.

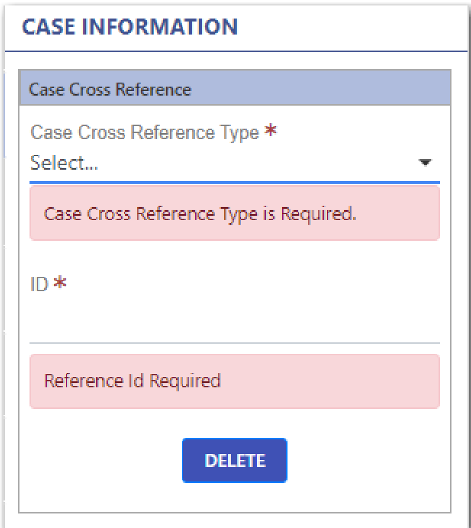


Figure 6.10 – Case Cross Reference Window

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

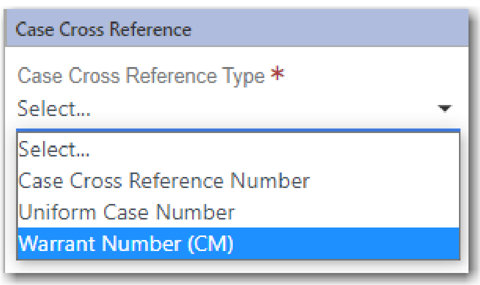


Figure 6.11 – Example of a Case Cross Reference Type Drop-Down List

4. Complete the required fields, and then click .

   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 . 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.

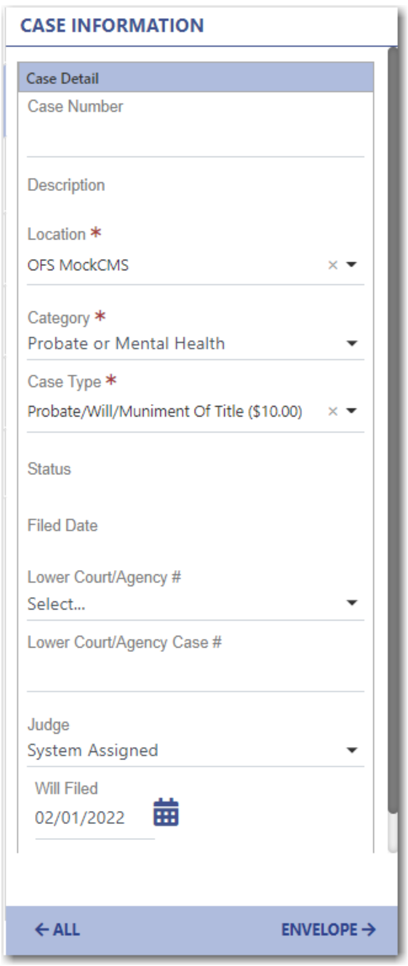


Figure 6.12 – Will Filed Date in the Case Information Pane

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.

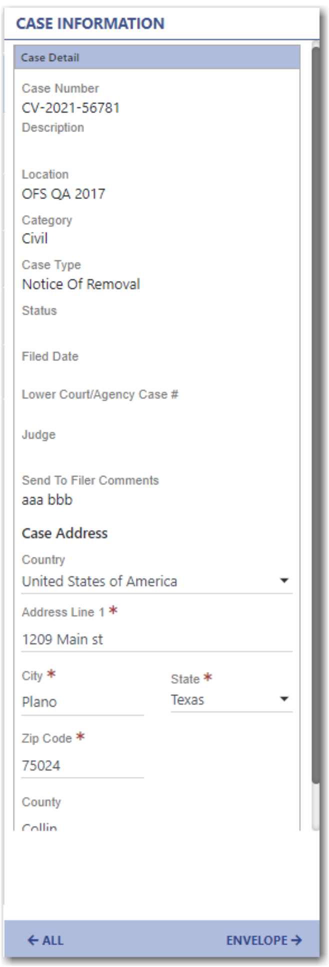


Figure 6.13 – Case Address Information in the Case Information Pane

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.

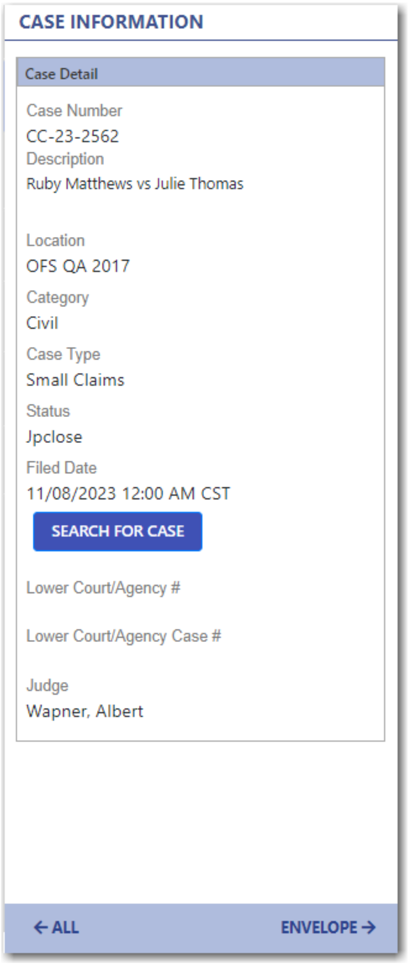


Figure 6.14 – Example of the Search for Case Button in a Case Information Pane

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.

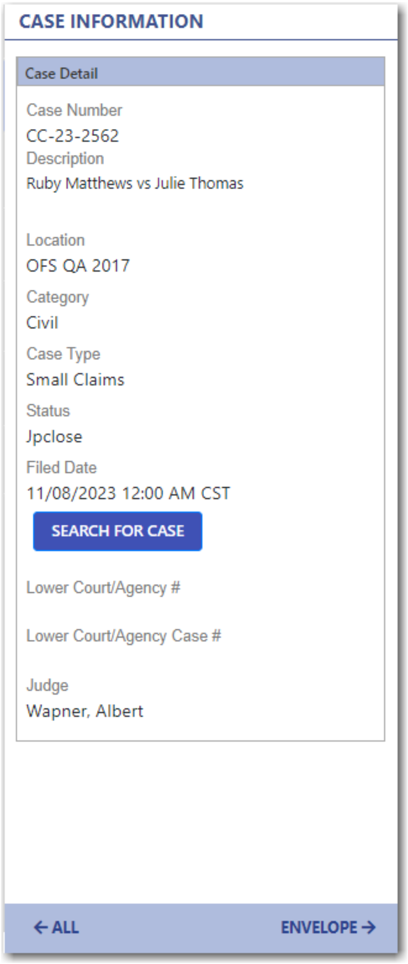


Figure 6.15 – Example of a Case Information Pane

4. Click **SEARCH FOR CASE**.

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

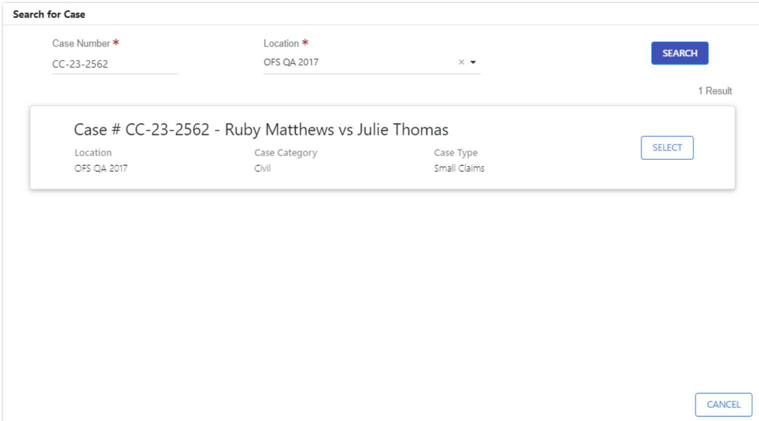
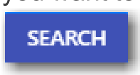


Figure 6.16 – Example of a Search for Case Window

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.

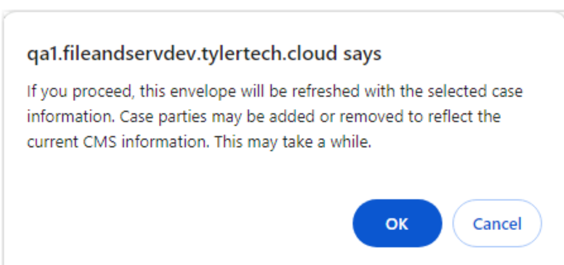


Figure 6.17 – Example of a Confirmation Message

7. Click **OK** to continue.

   The CMS Parties panes are displayed.

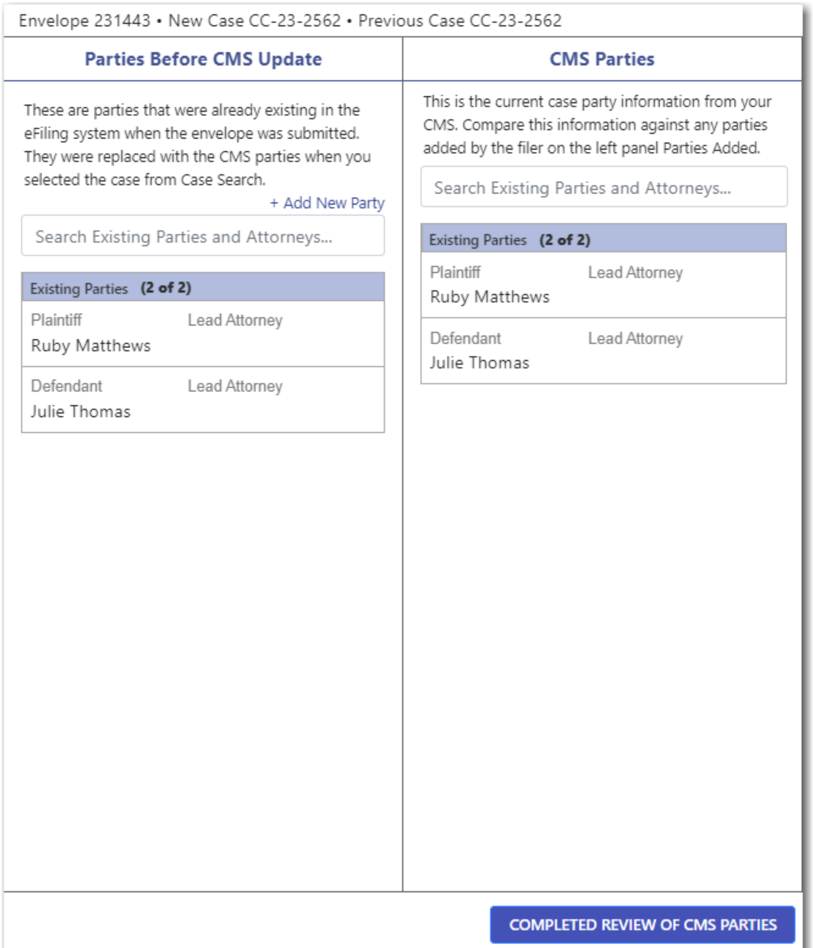


Figure 6.18 – Example of CMS Parties Panes

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

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

Envelope Information

Use the **Env** tab to access the Envelope pane. The envelope number is displayed at the top of the pane.

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

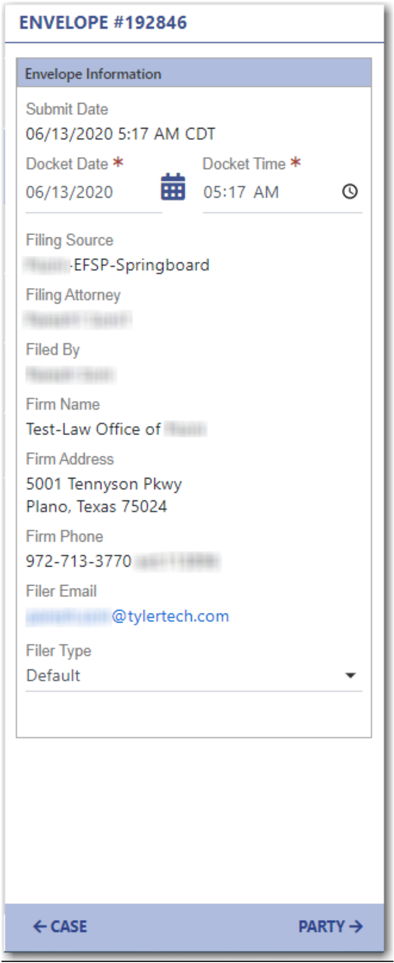
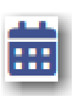


Figure 6.19 – Example of an Envelope Pane

If applicable, you can change three of the fields in the Envelope pane:

- Click  to change the docket date for the filings in this envelope.

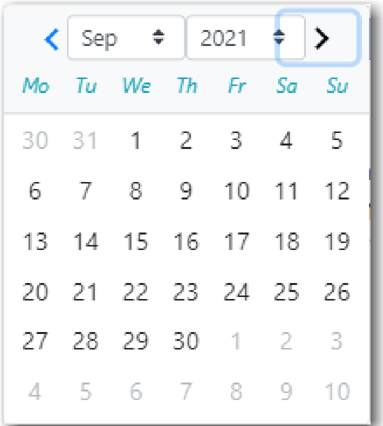
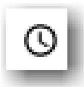


Figure 6.20 – Docket Date Calendar

- Click  to change the docket time.

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

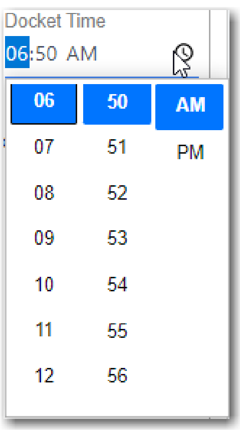


Figure 6.21 – Docket Time Drop-Down List

- 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.

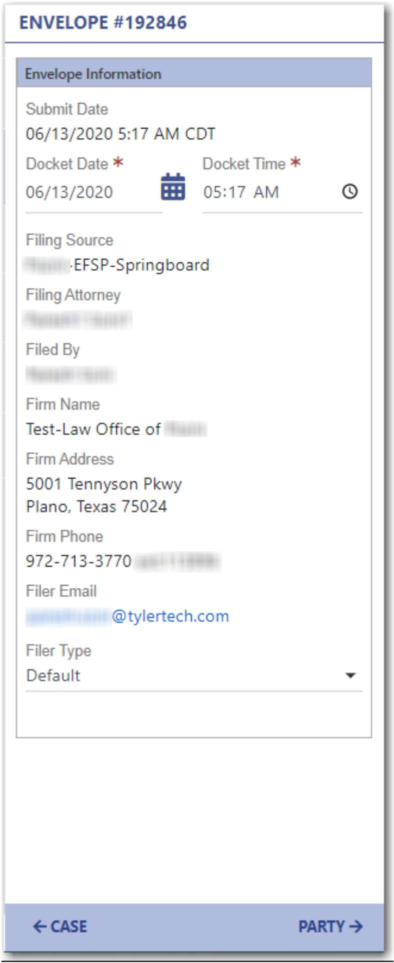
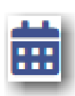


Figure 6.22 – Example of an Envelope Information Pane

2. Click .

   The *Edit Docket Date* dialog box is displayed.

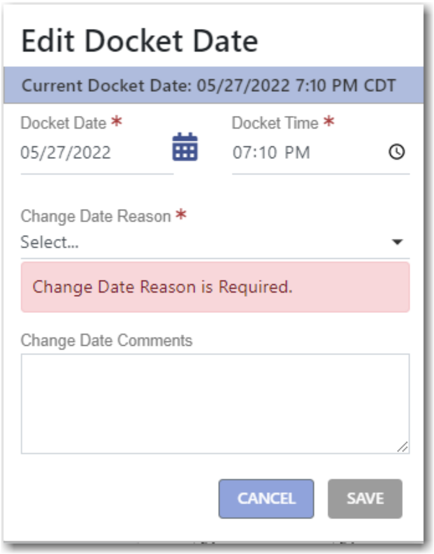


Figure 6.23 – Edit Docket Date Dialog Box

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

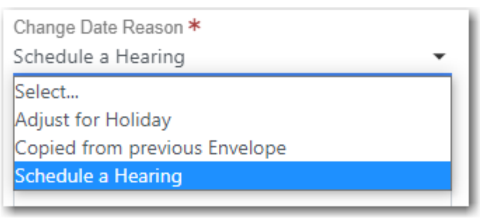


Figure 6.24 – Example of a Change Date Reason Drop-Down List

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.

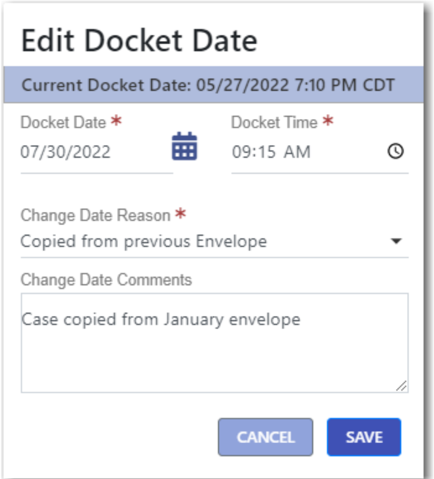


Figure 6.25 – Example of an Edit Docket Date Dialog Box with a Changed Date

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.

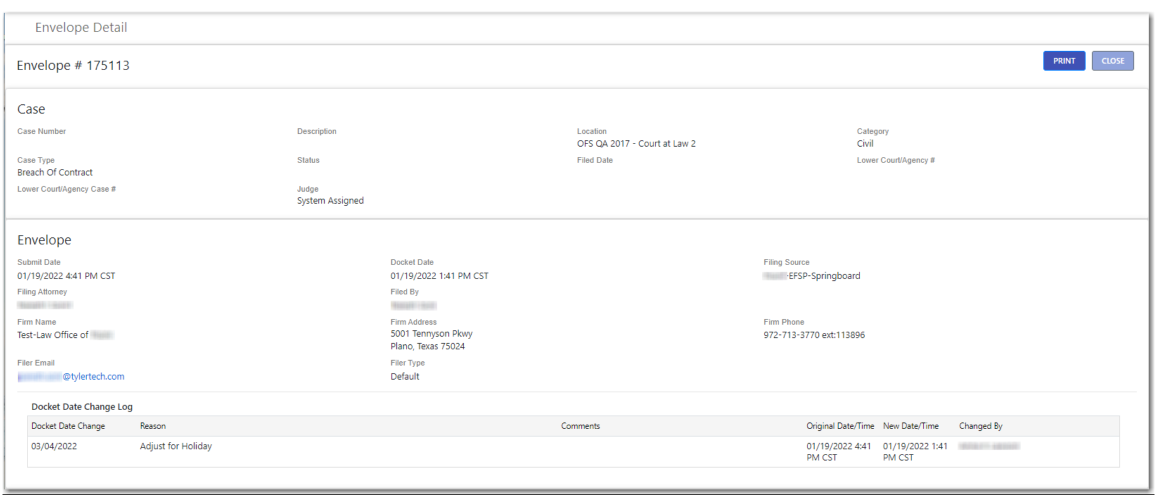


Figure 6.26 – Example of an Envelope Detail Page with the Docket Date Change Log Displayed

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.

Figure 6.27 – Example of a Party Information Pane

Click 

or the **Env** tab to return to the Envelope Information pane. Or, click 

or the **File** tab to navigate to the Filing Information pane.

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.

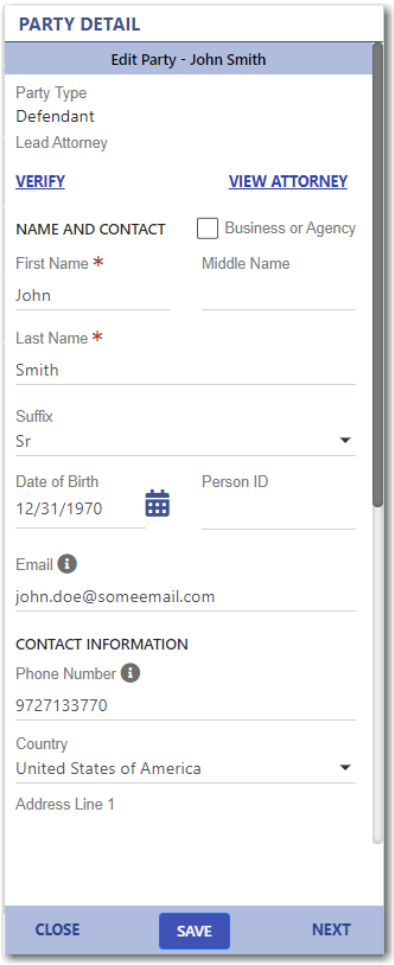


Figure 6.28 – Example of a Party Detail Pane

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.

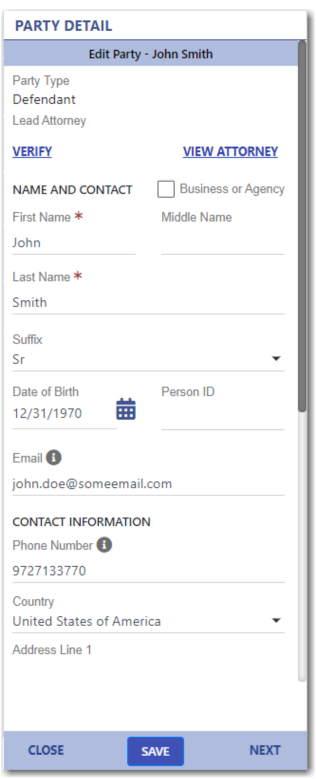


Figure 6.29 – Example of a Party Detail Pane

2. Click 

.

The Verify Party pane is displayed.

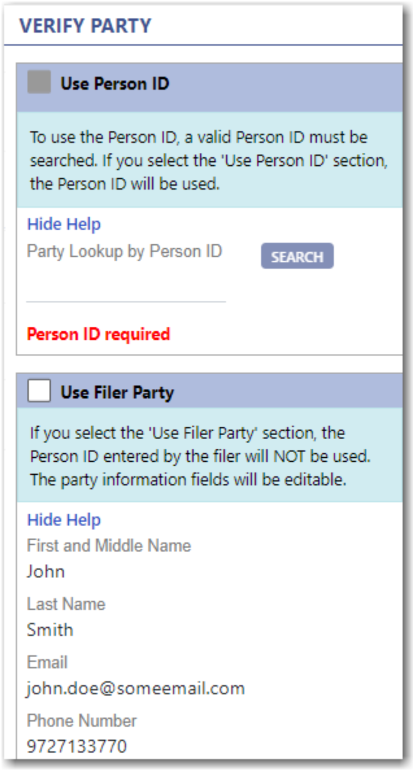


Figure 6.30 – Example of a Verify Party Pane

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.

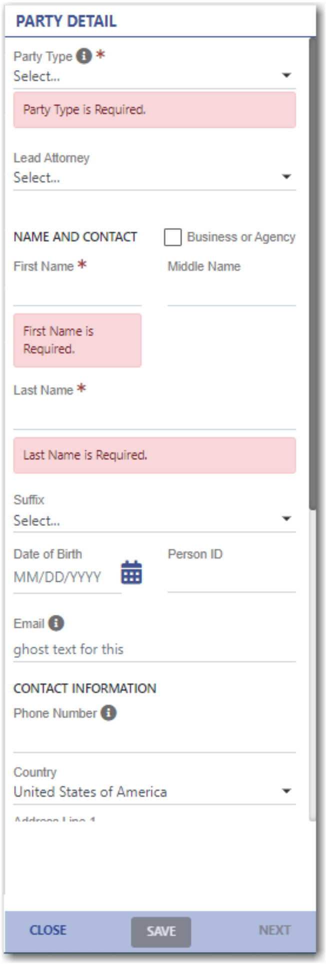


Figure 6.31 – Party Detail Pane

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

.

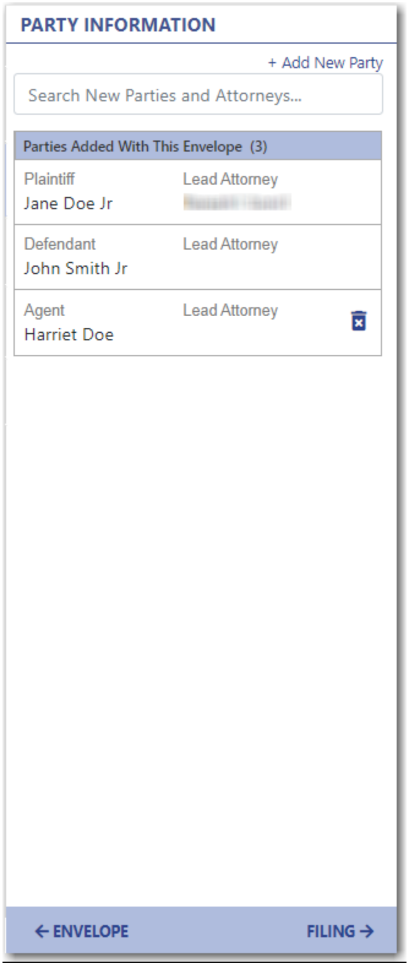


Figure 6.32 – Example of a Party Information Pane with the New Party Added

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.

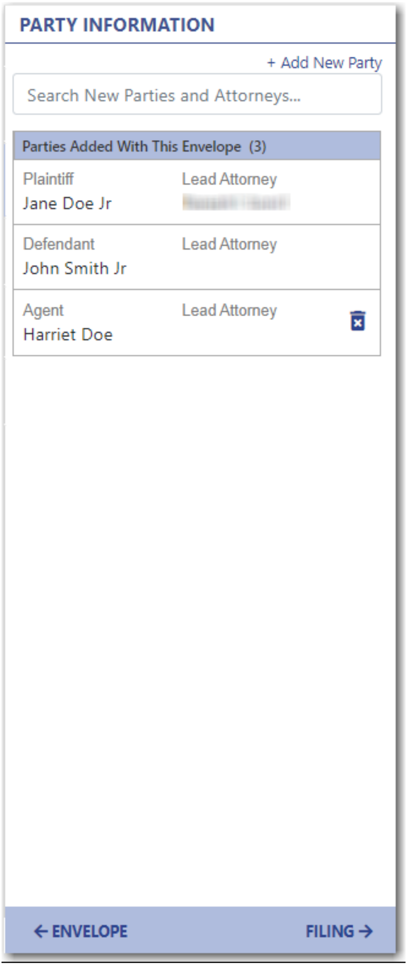


Figure 6.33 – Example of a Party Information Pane

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 

.

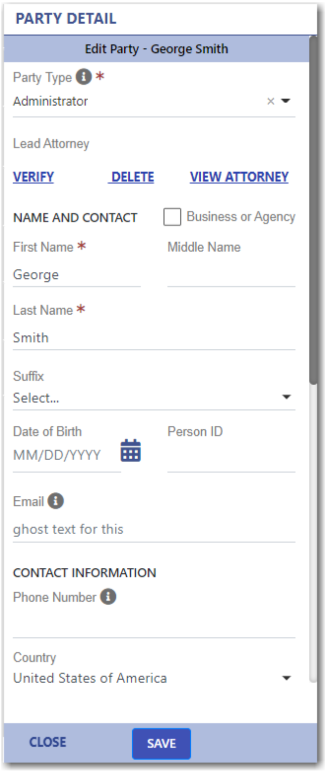


Figure 6.34 – Example of an Edit Party Section of a Party Detail Pane

Note: Only non-required parties can be deleted.

A message is displayed:

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

3. Click **OK** to continue, or click **Cancel** 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

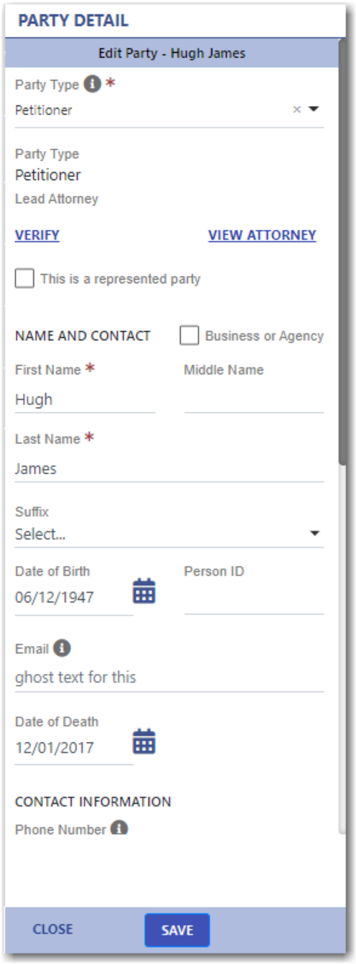
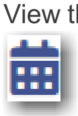


Figure 6.35 – Date of Death Information in the Party Detail Pane

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.

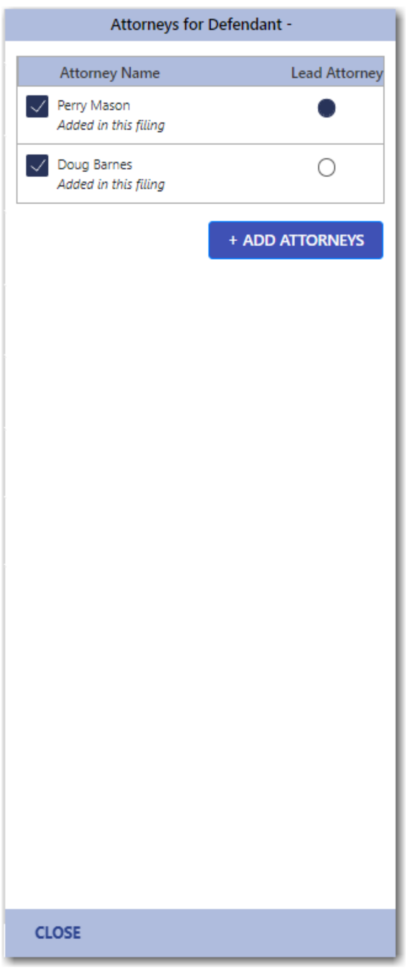


Figure 6.36 – Example of an Attorneys Pane

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 CONTINUE, and then click SAVE.

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 ADD FIRM ATTORNEY.

   The *Add Attorney* window is displayed.

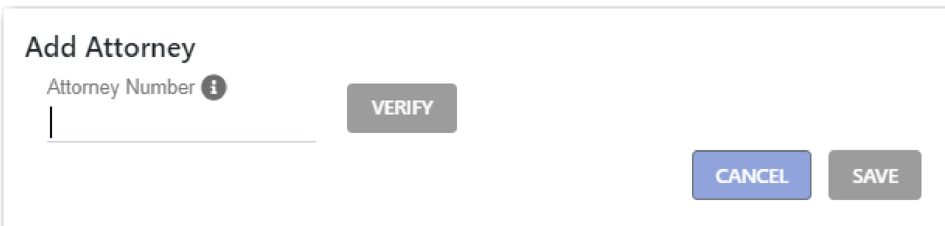


Figure 6.37 – Add Attorney Window

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

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

3. Click SAVE.

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

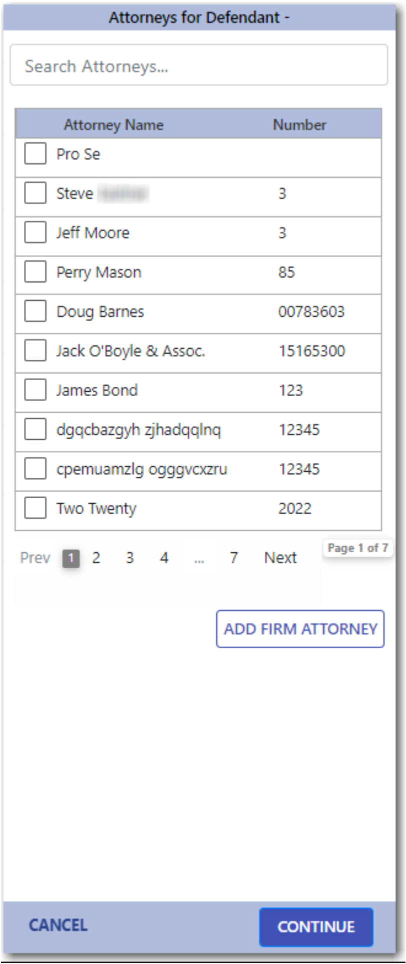


Figure 6.38 – Available Attorneys Pane

4. Select the check box for the attorneys whom you want to add for the specified party, and then click CONTINUE.
5. 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:

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

   The Attorneys pane is displayed.

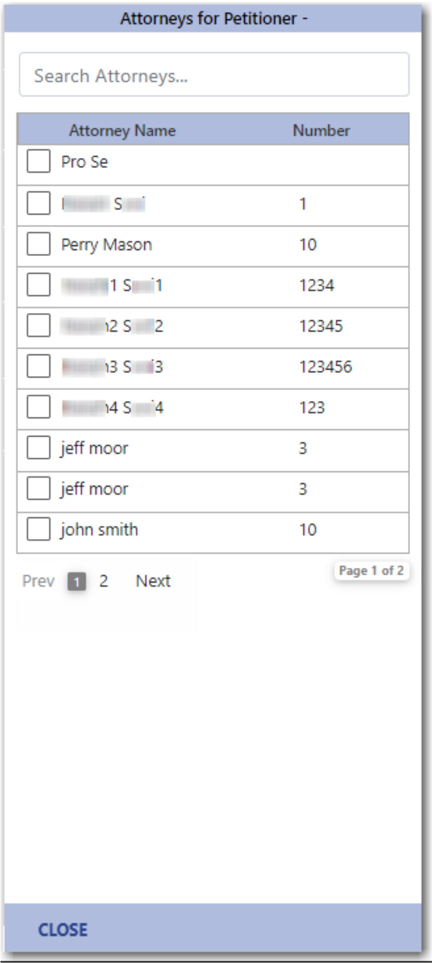


Figure 6.39 – Example of an Attorneys Pane

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

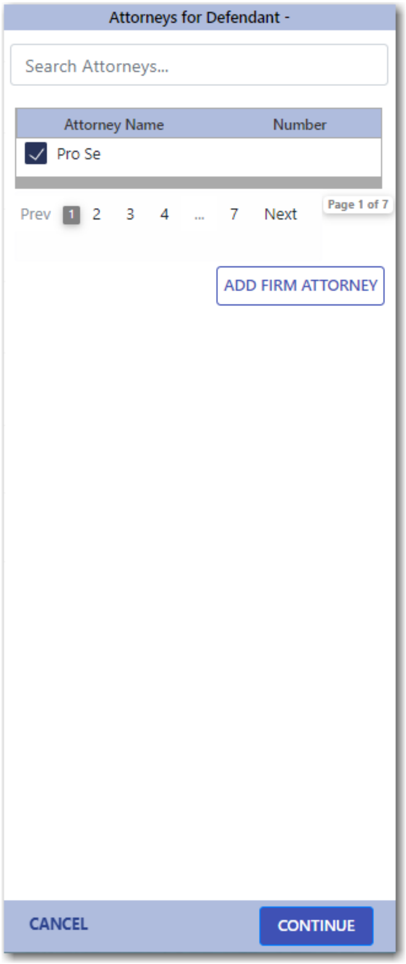


Figure 6.40 – Example of Pro Se Selected as Attorney

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.

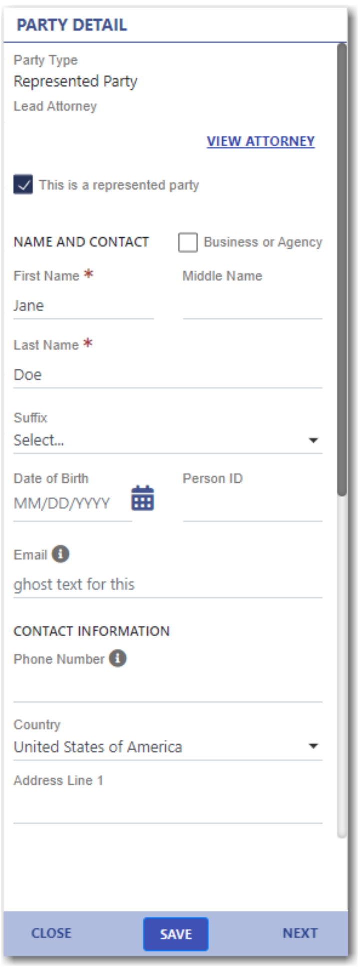


Figure 6.41 – Example of a Party Detail Pane with a Represented Party

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

   The **Representatives** section is displayed.

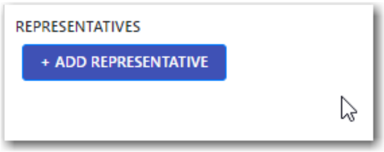


Figure 6.42 – Representatives Section

5. Click .

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

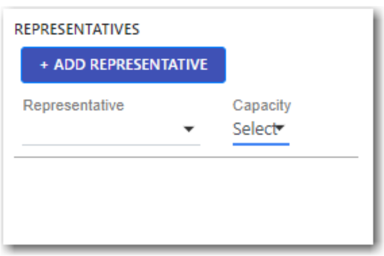


Figure 6.43 – Representatives Section with Additional Fields

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.

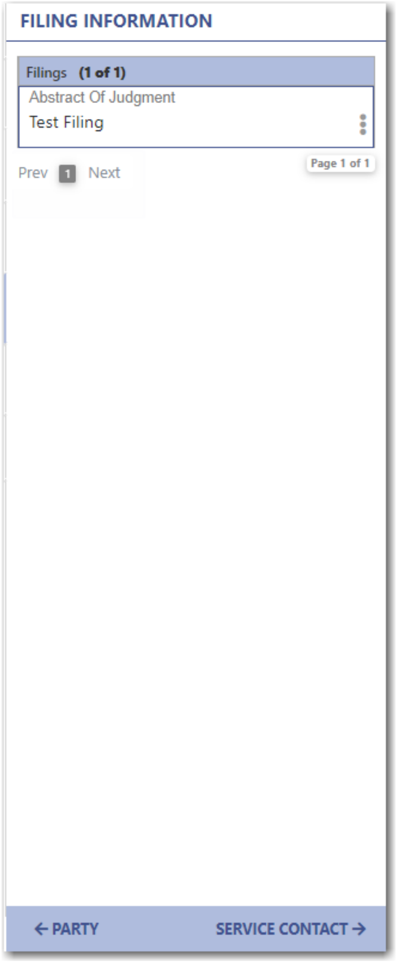


Figure 6.44 – Example of a Filing Information Pane

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.

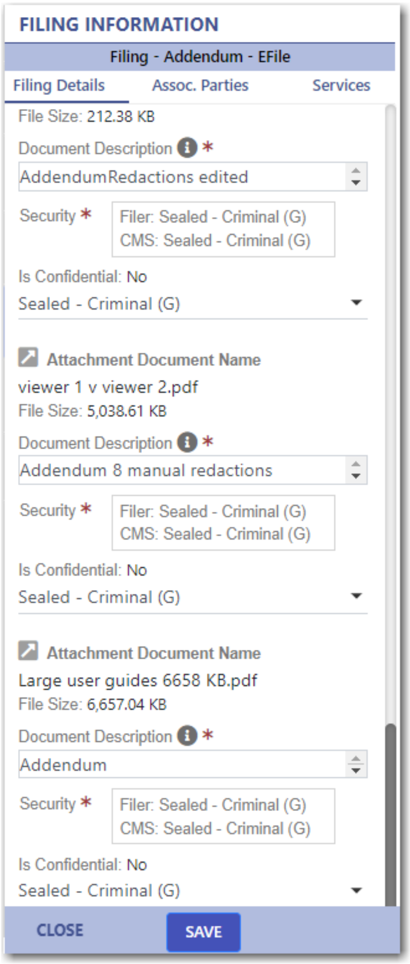


Figure 6.45 – Example of the Filing Details Section in the Filing Information Pane

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.

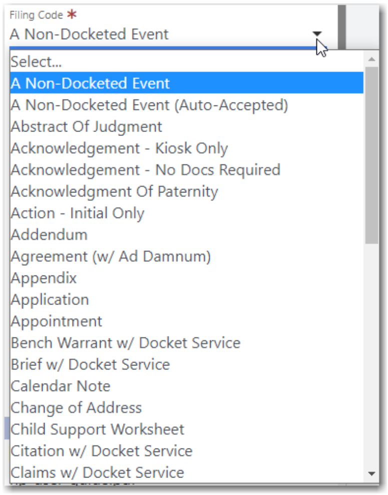


Figure 6.46 – Example of a Filing Code Drop- Down List

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.

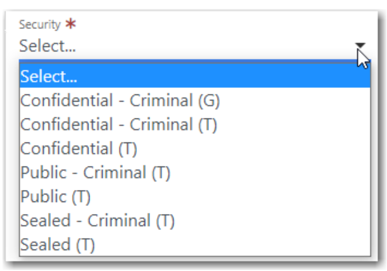


Figure 6.47 – Example of a Security Drop-Down List

If you make changes to the filing details, click 

. Or, click 

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.

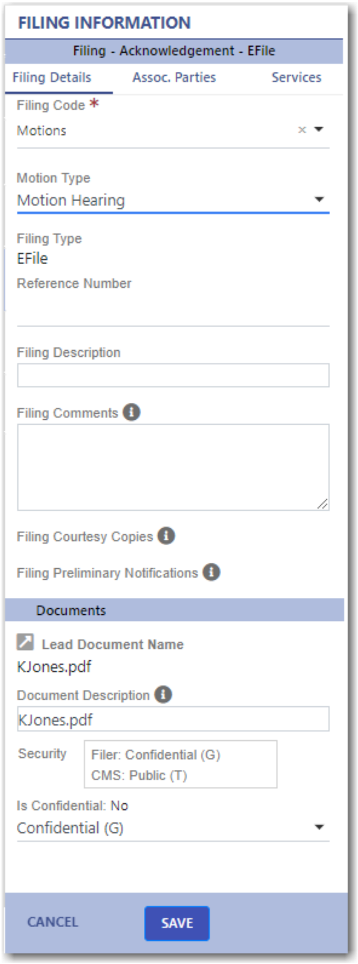


Figure 6.48 – Example of Motion Type Information in a Filing Details Pane

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

.

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.

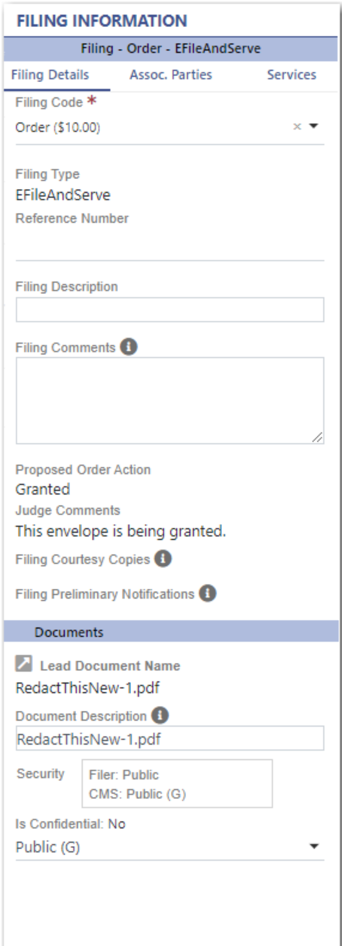


Figure 6.49 – Example of the Judge's Comments in a Filing Details Pane

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.

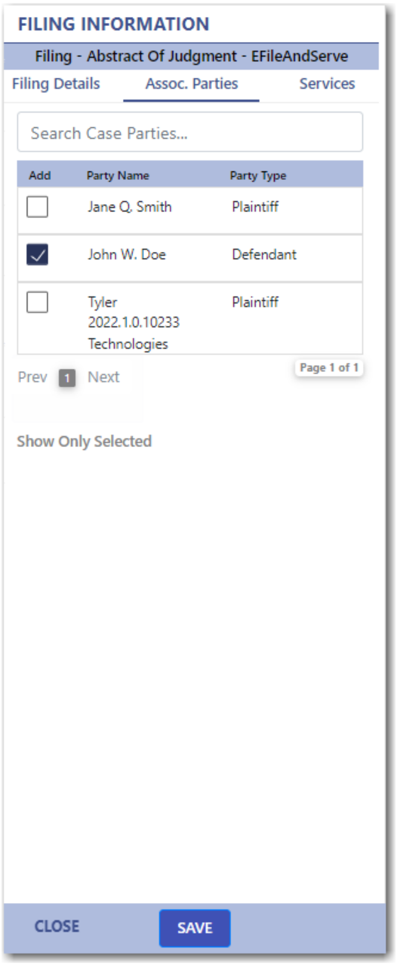


Figure 6.50 – Example of the Assoc. Parties Section in the Filing Information Pane

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.

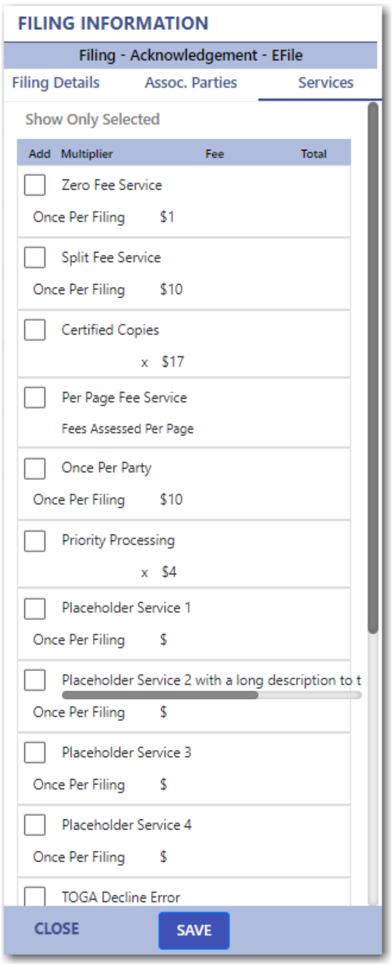


Figure 6.51 – Example of the Services Section in the Filing Information Pane

If you add or change any optional services, click 

.

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.

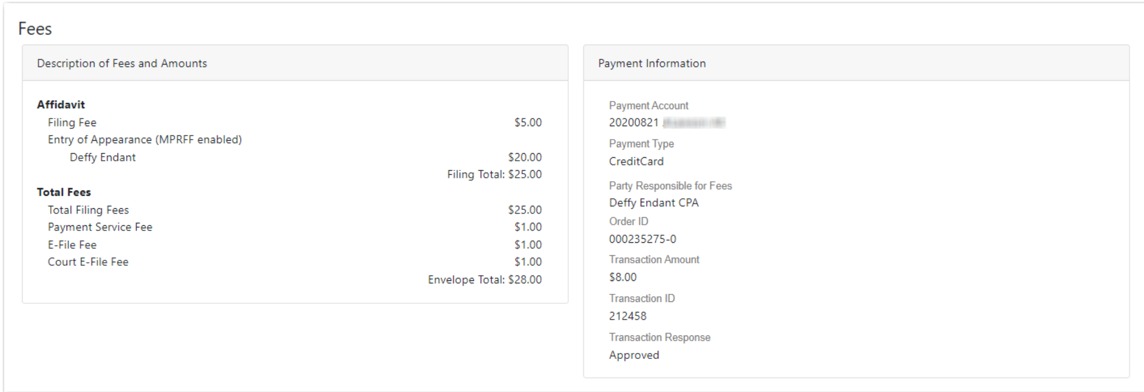


Figure 6.52 – Example of the Party Responsible for Fees in the Fees Section in Envelope Details

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.

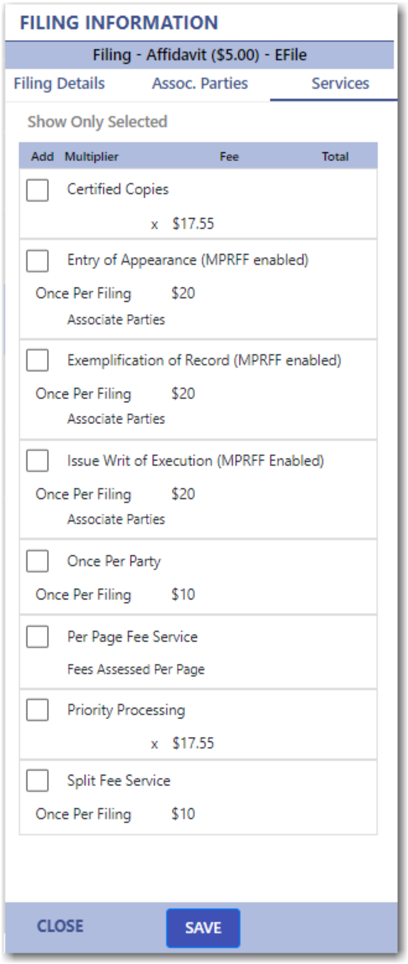


Figure 6.53 – Example of the Services Section in the Filing Information Pane

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.

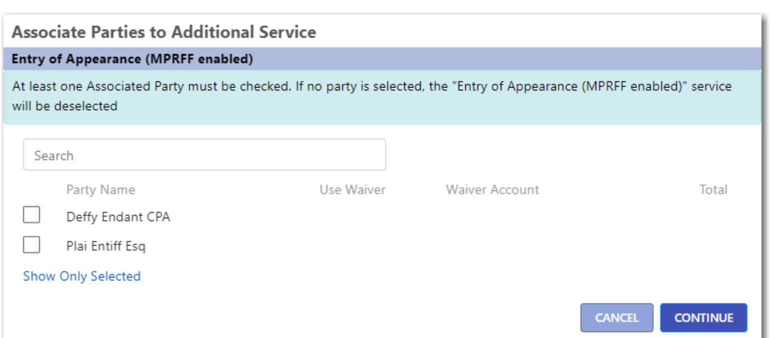


Figure 6.54 – Example of an Associate Parties to Additional Service Window

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

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

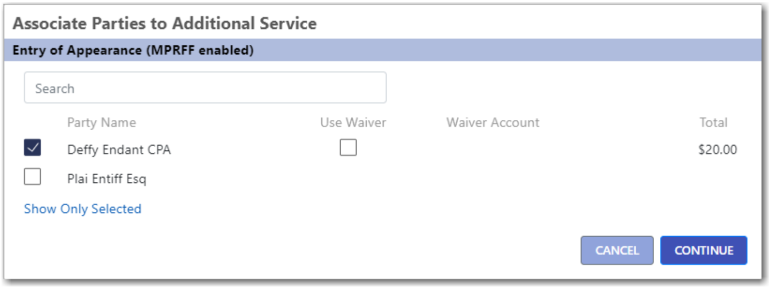


Figure 6.55 – Example of an Associate Parties to Additional Service Window with the Party and Cost Displayed

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

   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  .

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.

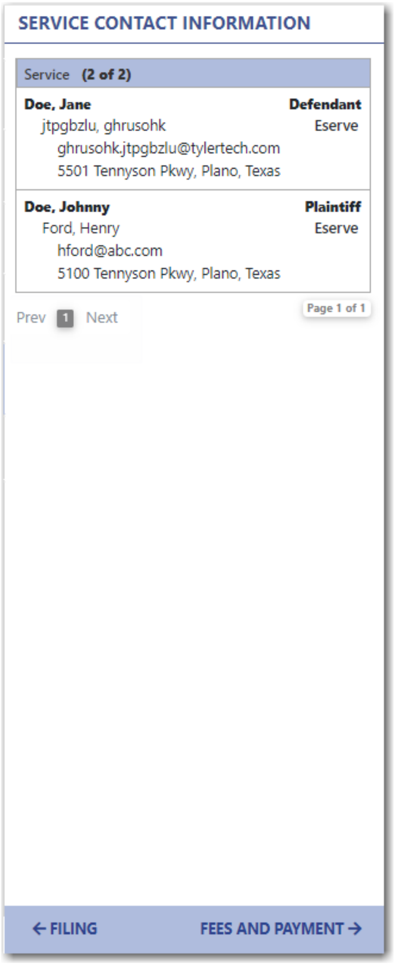


Figure 6.56 – Example of a Service Contact Information Pane

Click 

or the **File** tab to return to the Filing Information pane. Click 

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.

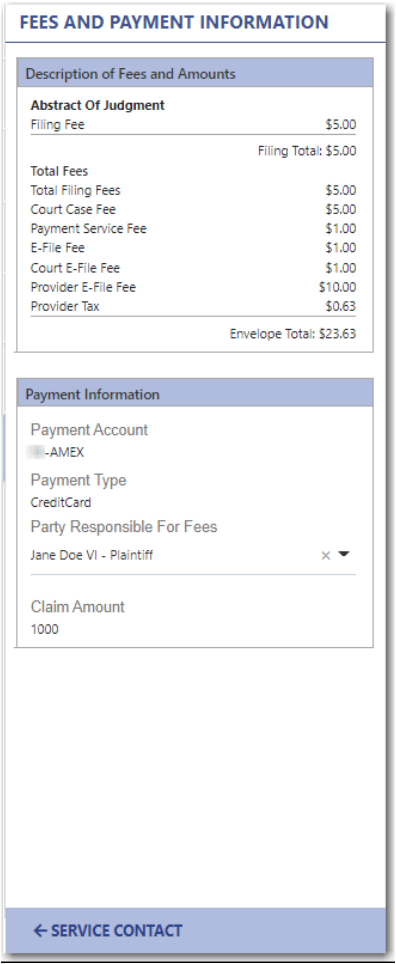


Figure 6.57 – Example of a Fees and Payment Information Pane

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.

Click 

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.

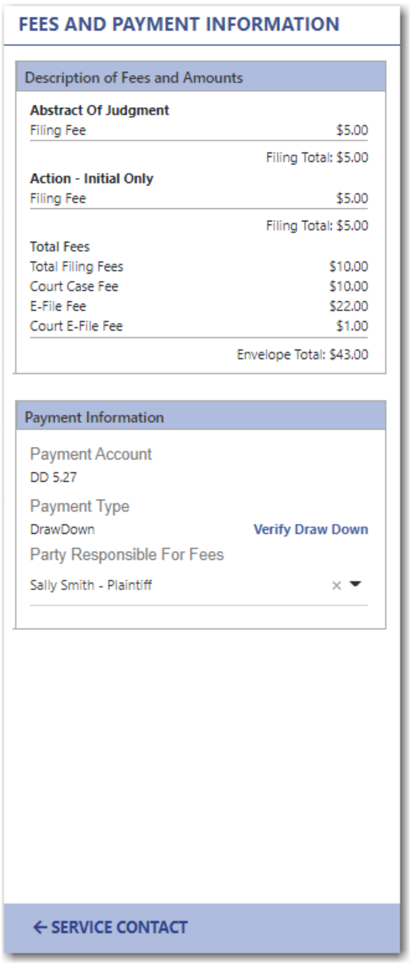


Figure 6.58 – Example of a Fees and Payment Information Pane

3. In the **Payment Information** section, click Verify Draw Down.

   The *Draw Down Balance* window is displayed.

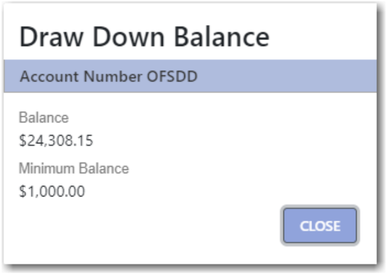


Figure 6.59 – Example of a Draw Down Balance Window

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.

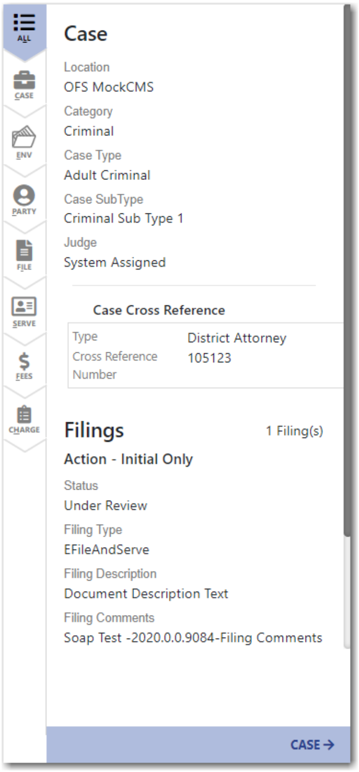


Figure 6.60 – Example of an Envelope with the Tabs Displayed

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

   The Case Information pane is displayed.

3. View the category and case type to verify that this is a criminal case. Change any information, as applicable.
4. Click the **Party** tab to view the party information.

   The Party Information pane is displayed.

5. 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.

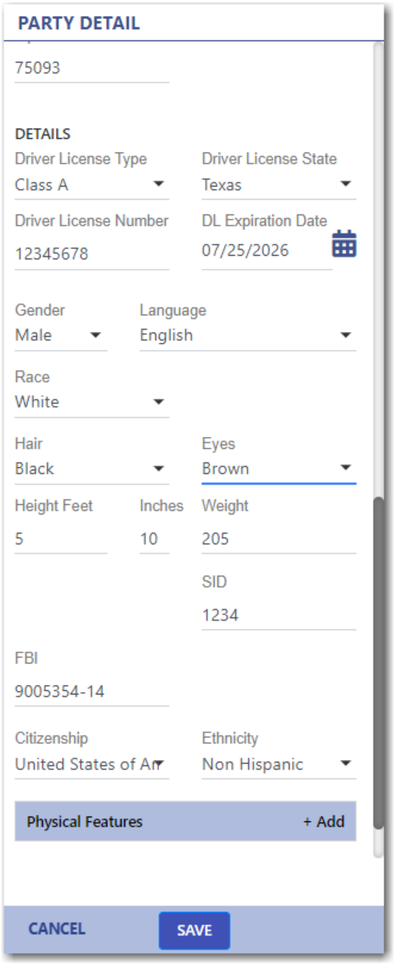


Figure 6.61 – Example of a Party Detail Pane with Details Displayed

6. Change any party information, as applicable.
7. Click 

.
8. Click the **Charge** tab.

   The Charge Information pane is displayed.

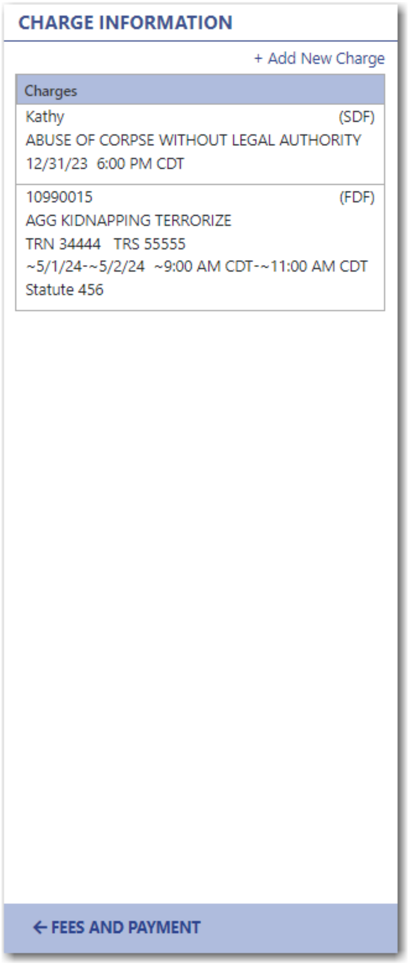


Figure 6.62 – Example of a Charge Information Pane

9. Click a charge to view more information about that charge.

   The Charge Detail pane for the specified charge is displayed.

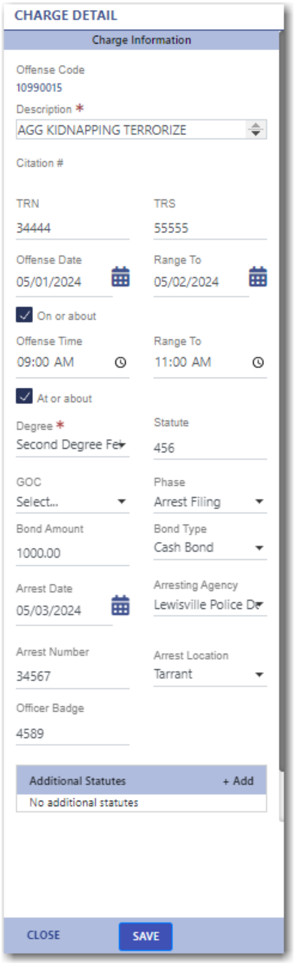


Figure 6.63 – Example of a Charge Detail Pane

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.

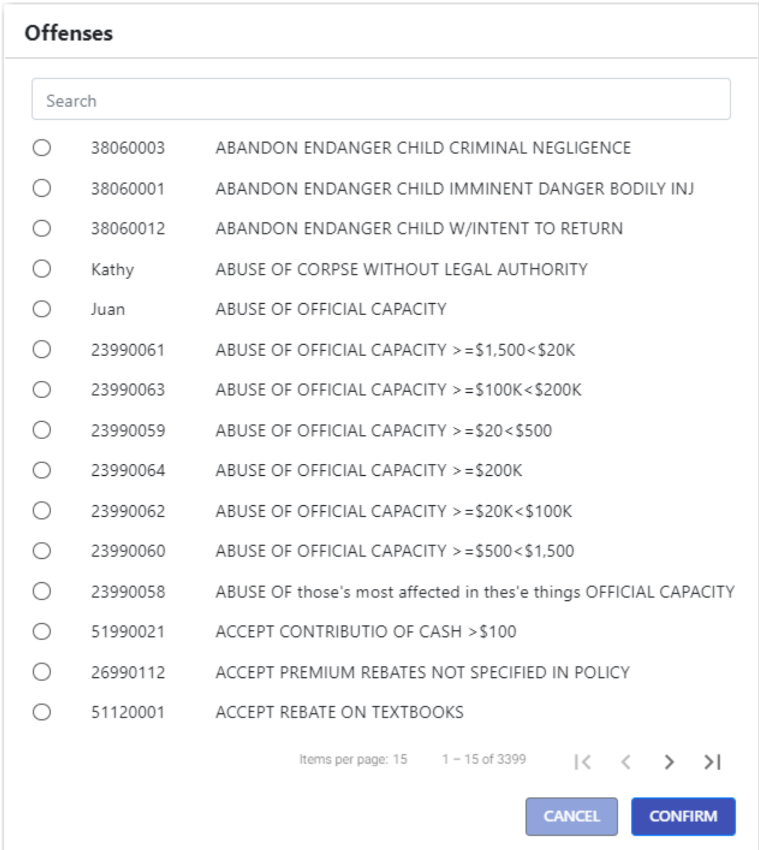


Figure 6.64 – Example of an Offenses Window

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.

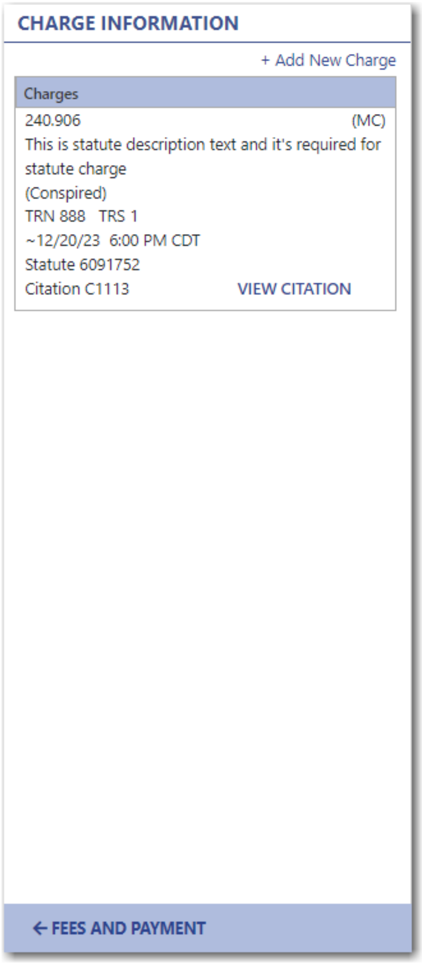


Figure 6.65 – Example of a Charge Information Pane

3. Click 

.

   The Citation Information pane is displayed.

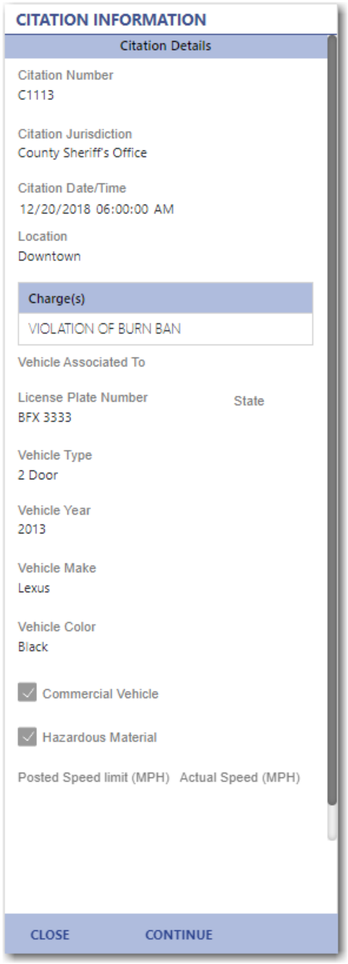


Figure 6.66 – Example of a Citation Information Pane

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.

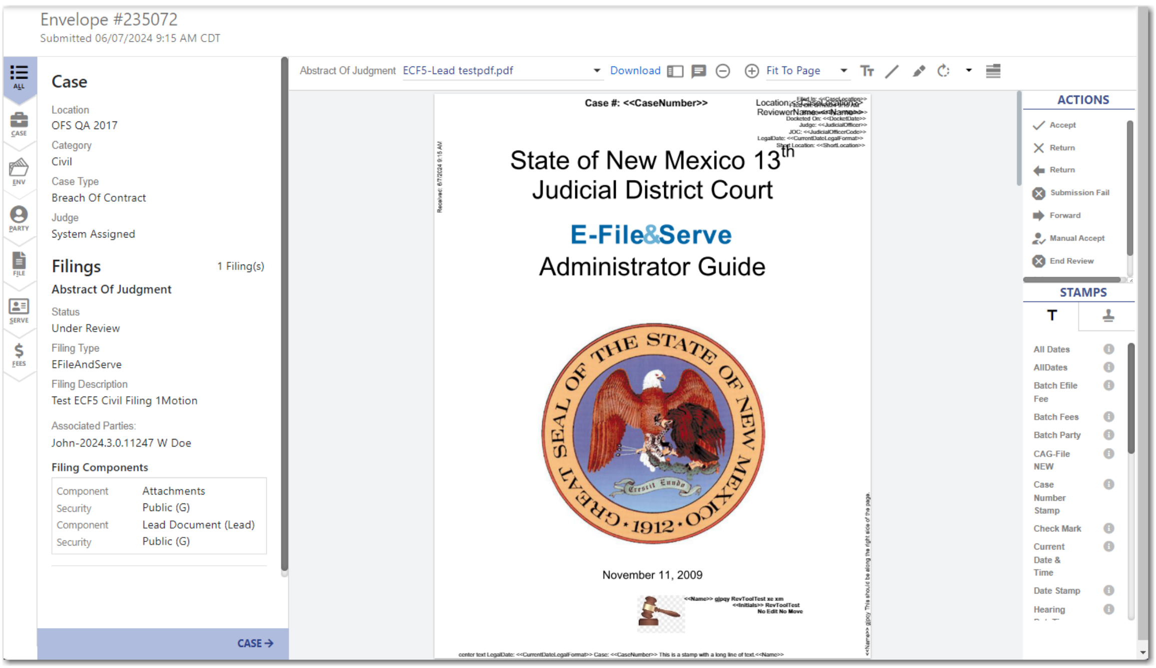


Figure 7.1 – Example of a Test Document in Document Viewer 1

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.

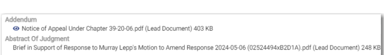


Figure 7.2 – Example of a Document Selector Drop-Down List

If you want to download the original document, click Download.

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

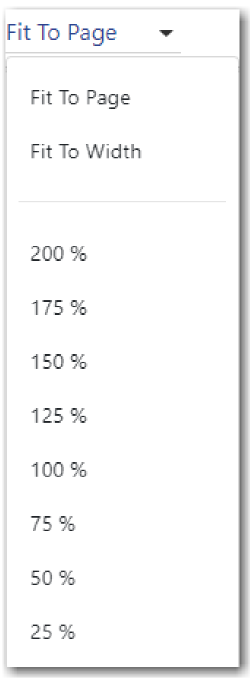


Figure 7.3 – Fit To Page Drop-Down List

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

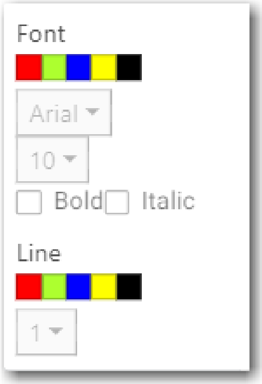


Figure 7.4 – Example of the Available Font and Line Options for Document Review

- 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.

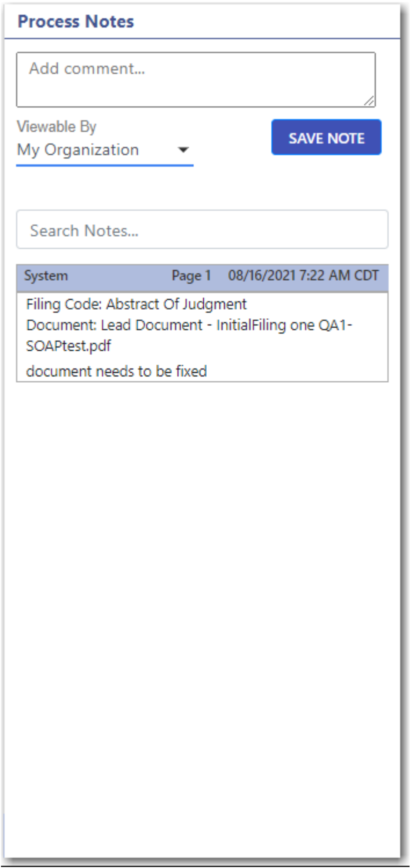


Figure 7.5 – Example of a Process Notes Pane

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.

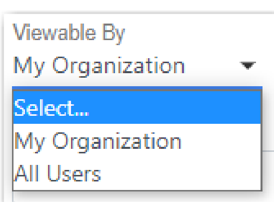


Figure 7.6 – Example of a Viewable By Drop-Down List

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.

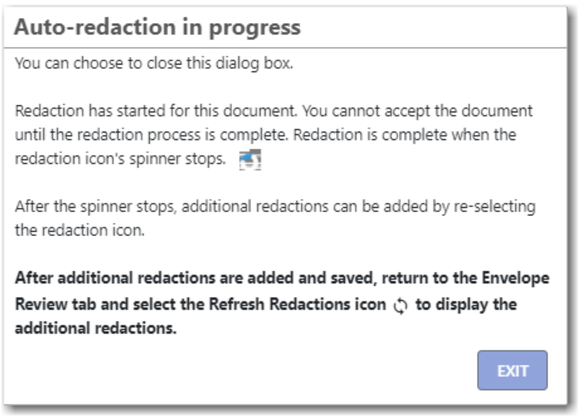


Figure 7.7 – Auto-Redaction in Progress Window

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.

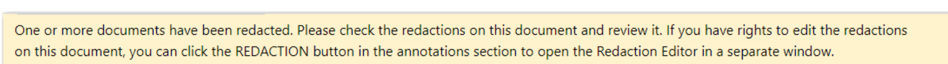


Figure 7.8 – Example of a Banner for Redacted Documents

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.

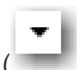
Add Annotations

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

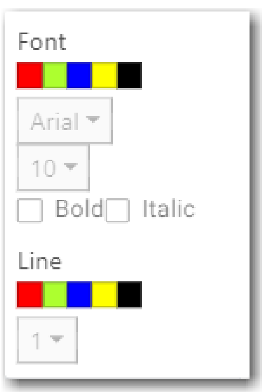


Figure 7.9 – Example of the Available Font and Line Options for Document Review

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.

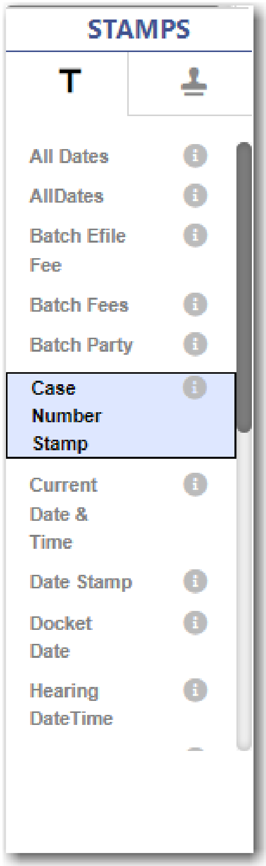


Figure 7.10 – Example of a "Case Number Stamp" Selected in the Text Stamps Pane

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.

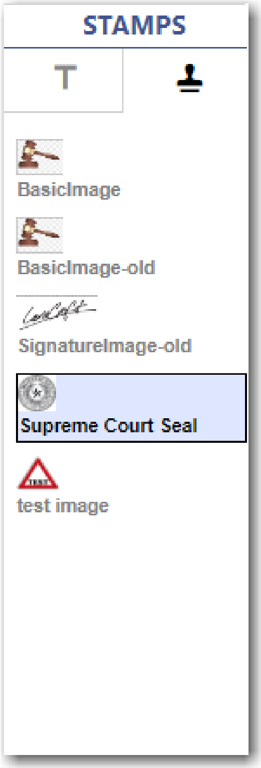


Figure 7.11 – Example of a "Supreme Court Seal" Stamp in the Image Stamps Pane

8 Document Viewer 2

Topics covered in this chapter

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.

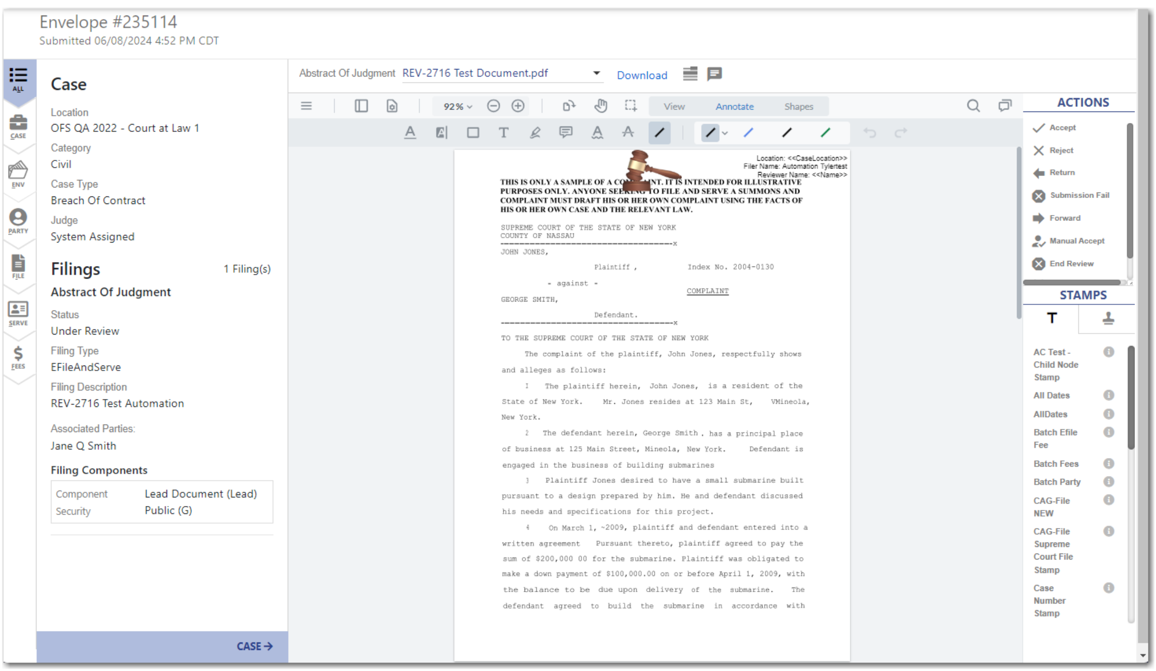


Figure 8.1 – Example of a Document Displayed in Viewer 2

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.

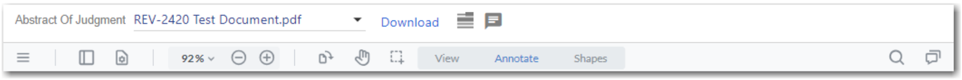


Figure 8.2 – Example of a Basic Viewer Panel

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

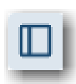
The following buttons are displayed in the basic viewer panel at all times, but the **Annotate** and **Shapes** buttons require you to click them to reveal more options:

- **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.

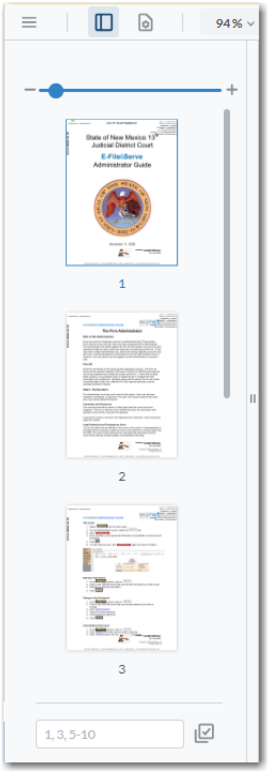


Figure 8.3 – Example of a Thumbnail View of the Document in the Viewer

- Click  to view options for page controls.

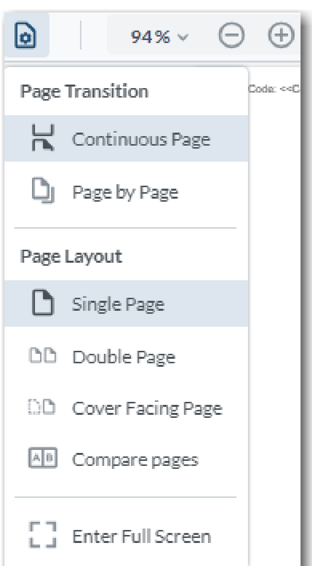
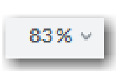


Figure 8.4 – Example of a Page Controls Drop-Down List

- Click 

 to view zoom options.

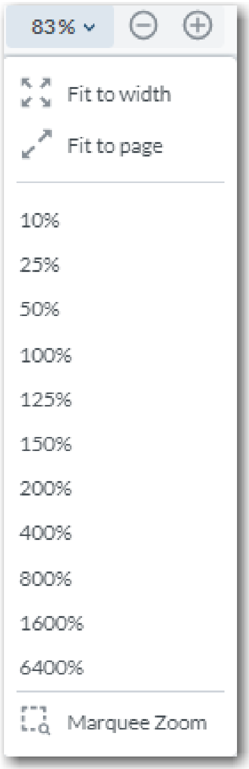


Figure 8.5 – Example of a Zoom Drop-Down List

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.

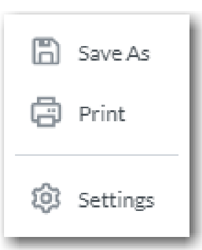


Figure 8.6 – Drop-Down List of Menu Icon Options

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

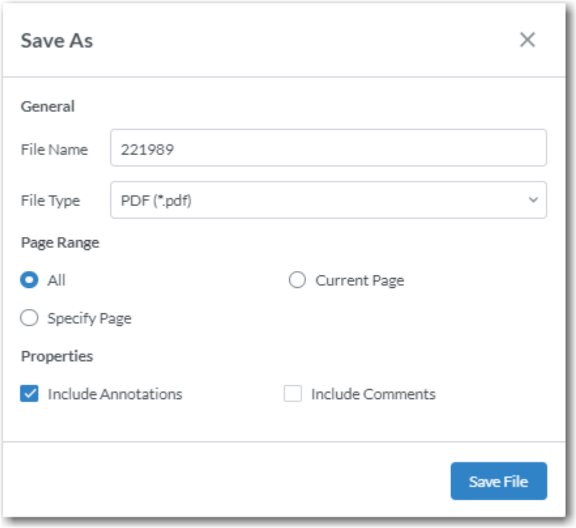


Figure 8.7 – Example of a Save As Window

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.

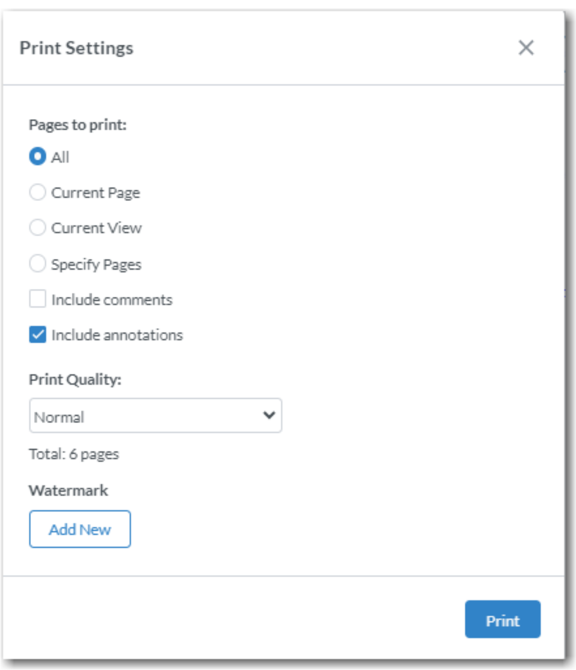


Figure 8.8 – Example of a Print Settings Window

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**.

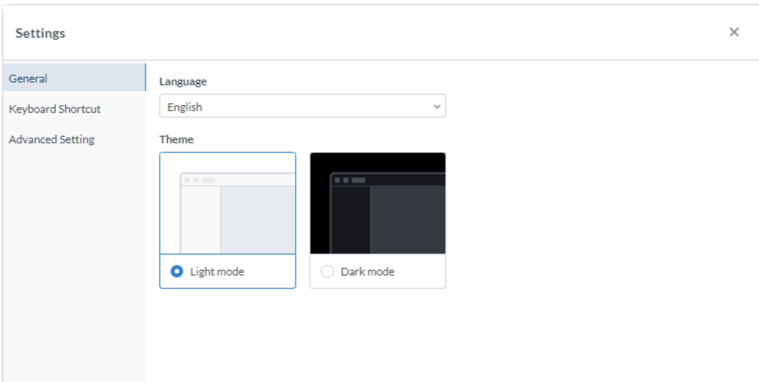


Figure 8.9 – Example of a Settings Window—General

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.

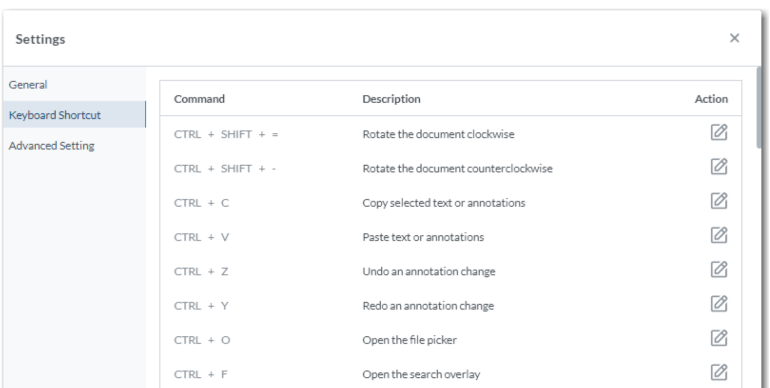


Figure 8.10 – Example of a Settings Window—Keyboard Shortcuts

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.

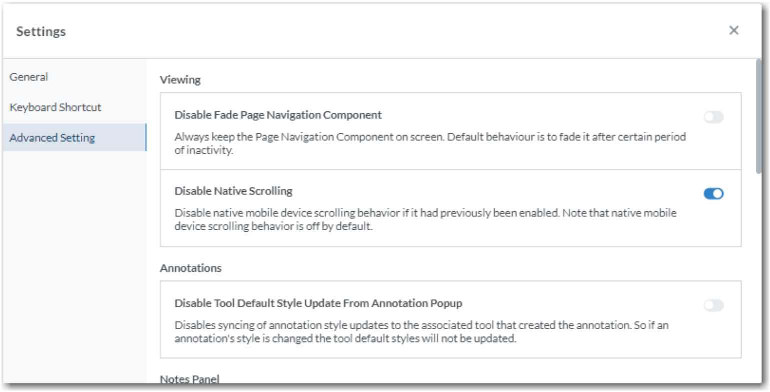


Figure 8.11 – Example of a Settings Window—Advanced Settings

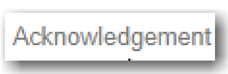
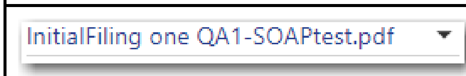
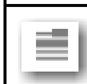
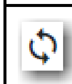
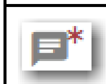
6. Enable or disable the settings that you want to use for viewing your document. Then, close the window when you are done.

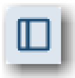
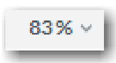
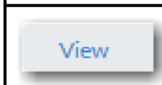
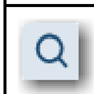
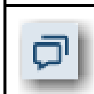
Document Viewer Icons and Options

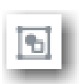
The icons available in Viewer 2 are described in the following sections.

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 *Redaction Viewer* 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.

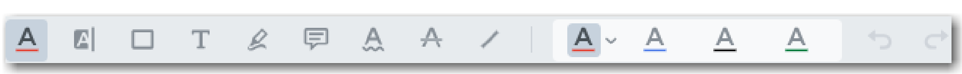
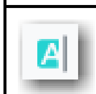
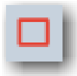
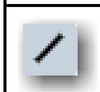
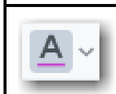


Figure 8.12 – Example of an Annotate Panel

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
	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 Annotate panel.**
	Click the icon to apply free text to the document. **Note: You can select favorite colors for the free text from the color palette. The favorite colors are displayed in the Annotate 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 Annotate panel.**
	Click the icon to apply a note to the document. Other reviewers can see the notes that you apply if you save them. **Note: You can select favorite colors for the note from the color palette. The favorite colors are displayed in the Annotate panel.**
	Click the icon to apply a squiggly underline to a part of the document under review. **Note: You can select favorite colors for the squiggly from the color palette. The favorite colors are displayed in the Annotate panel.**
	Click the icon to strike out a part of the document under review. **Note: You can select favorite colors for the strikeout from the color palette. The favorite colors are displayed in the Annotate panel.**
	Click the icon to apply a straight line to a part of the document under review. **Note: You can select favorite colors for the line from the color palette. The favorite colors are displayed in the Annotate panel.**
	Click the icon when the drop-down arrow is displayed to open the Annotate options window. **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.**

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.**

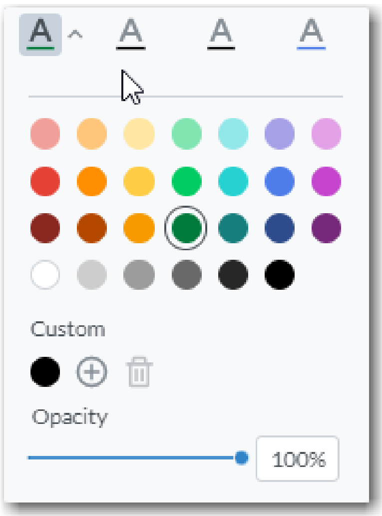
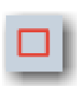
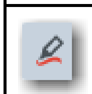


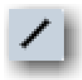
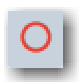
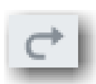
Figure 8.13 – Example of an Annotate Options Window

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
	Click the icon to apply a straight line to a part of the document under review. **Note: You can select favorite colors for the line from the color palette. The favorite colors are displayed in the Shapes panel.**
	Click the icon to apply an ellipsis to a part of the document under review. **Note: You can select favorite colors for the ellipsis from the color palette. The favorite colors are displayed in the Shapes panel.**
	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.**

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.

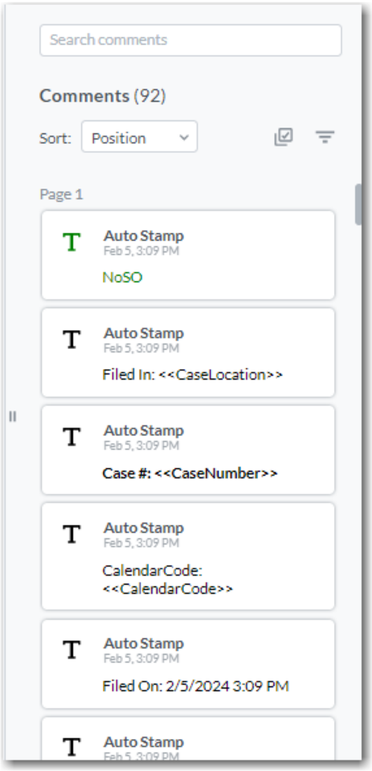


Figure 8.15 – Example of the Comments Panel

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

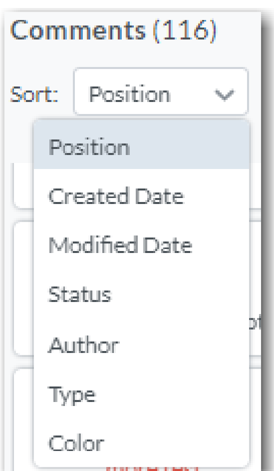


Figure 8.16 – Example of a Comments Sort Drop-Down List

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

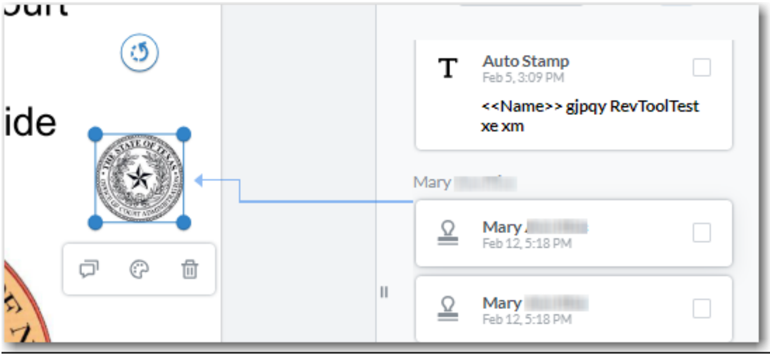
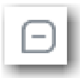


Figure 8.17 – Example of a Comments Panel

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

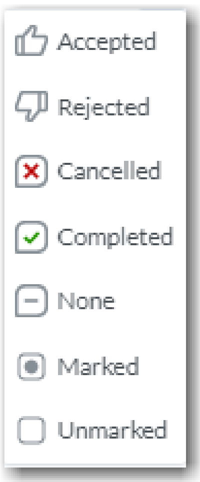


Figure 8.18 – Example of Status Options

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.

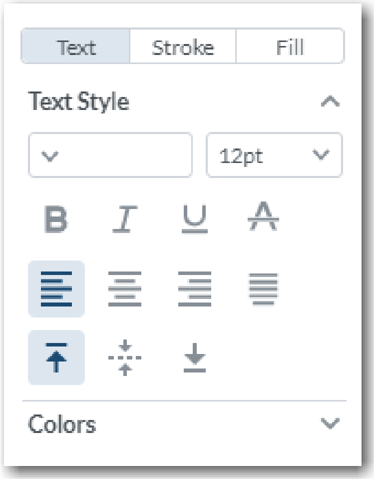


Figure 8.22 – Text Style Options

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

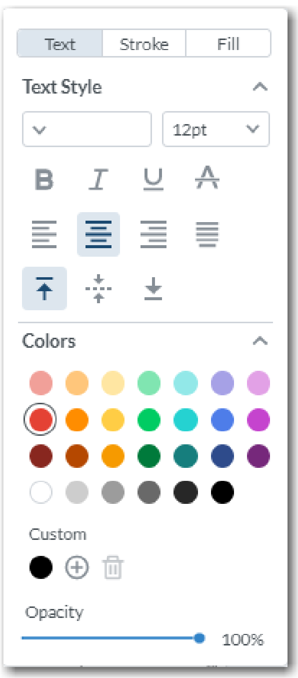


Figure 8.23 – Text Style and Colors Options

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

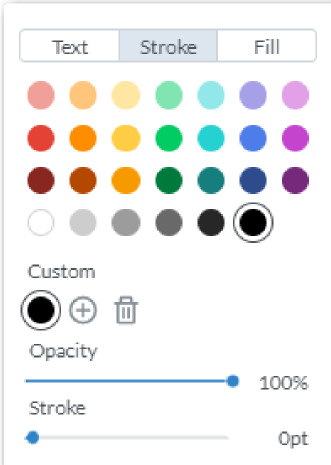


Figure 8.24 – Stroke Options

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

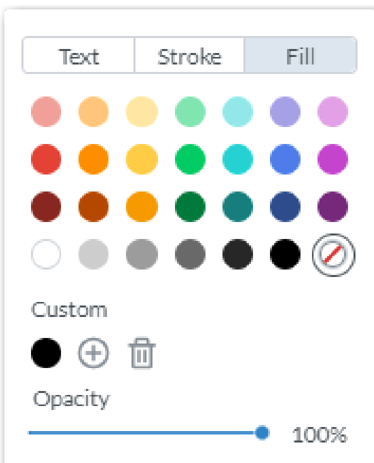


Figure 8.25 – Fill Options

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

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.

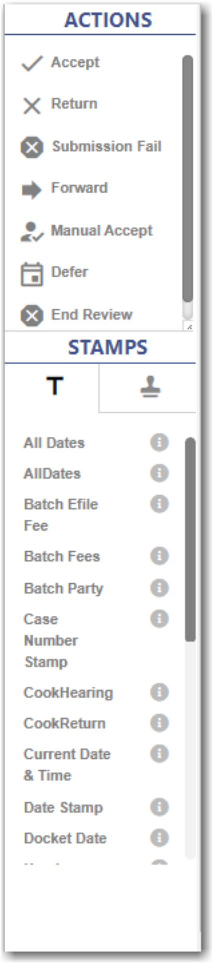


Figure 9.1 – Example of an Actions Pane

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.

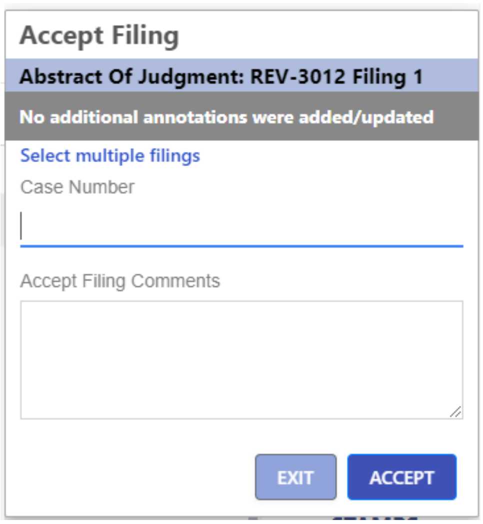


Figure 9.3 – Example of an Accept Filing Dialog Box with the No Annotations Message Displayed

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.

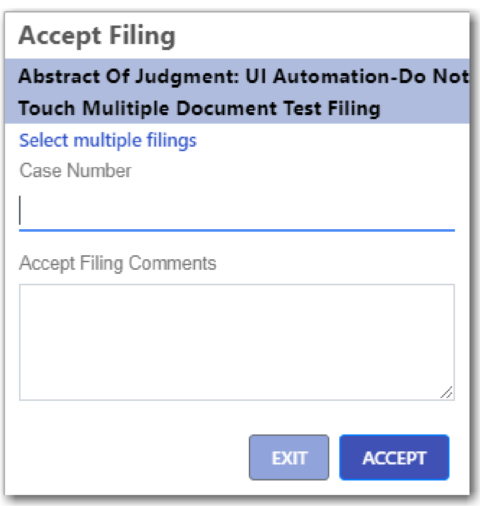


Figure 9.4 – Example of an Accept Filing Dialog Box

2. To review and accept multiple filings, click .

   Another dialog box is displayed.

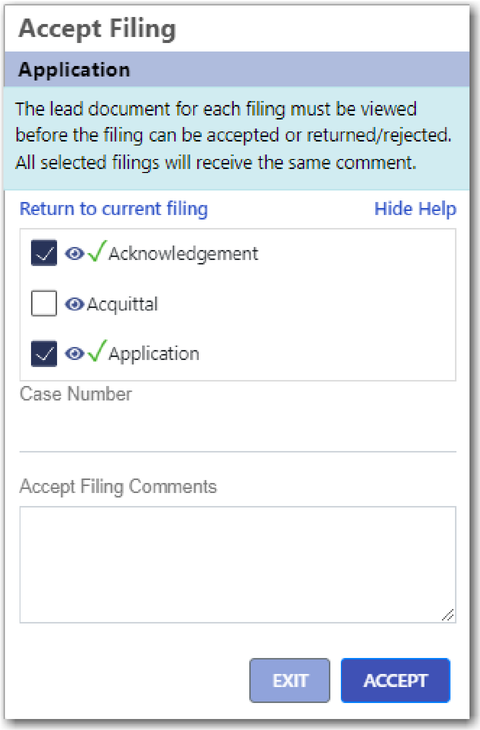


Figure 9.5 – Example of an Accept Filing Dialog Box for Multiple Filings

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.

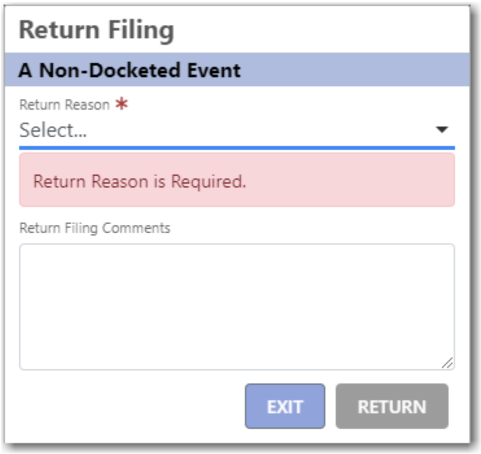


Figure 9.6 – Return Filing Dialog Box

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.

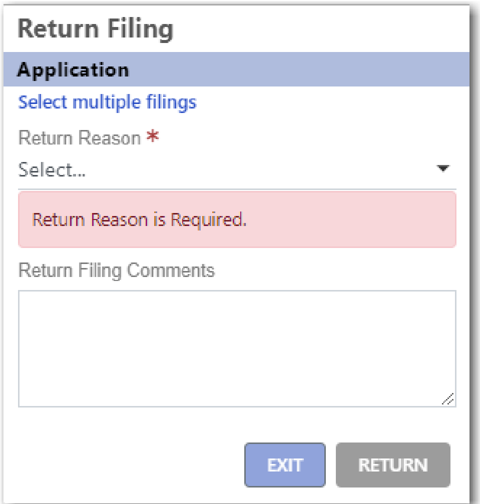


Figure 9.7 – Example of a Return Filing Dialog Box

2. To review and return multiple filings, click 

.

   Another dialog box is displayed.

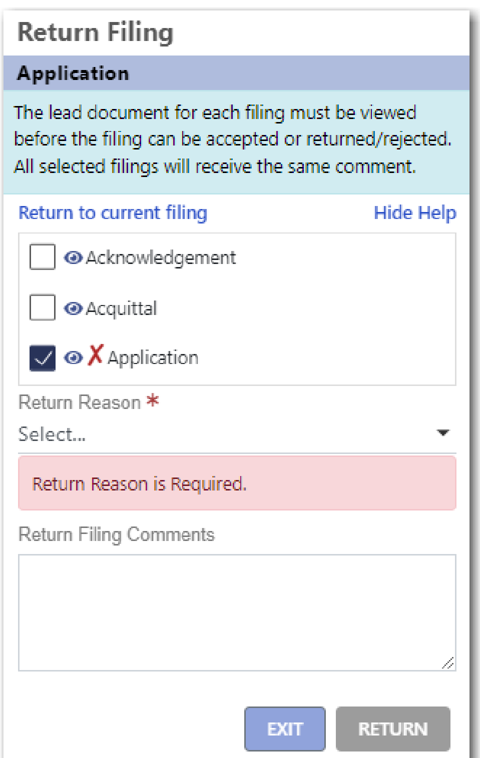


Figure 9.8 – Example of a Return Filing Dialog Box for Multiple Filings

3. Select the filings that you want to return.
4. 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.

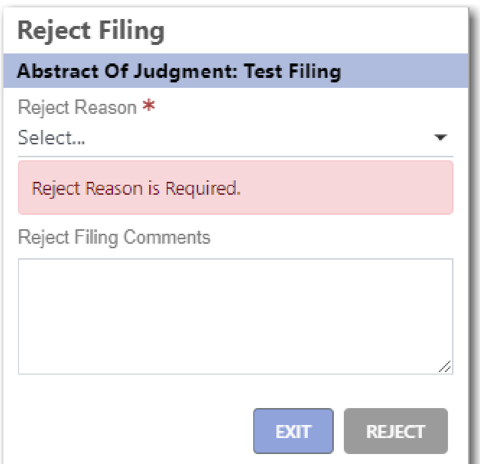


Figure 9.9 – Reject Filing Dialog Box

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

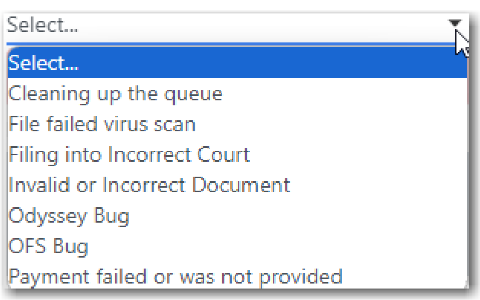


Figure 9.10 – Example of a Reject Reason Drop-Down List

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.

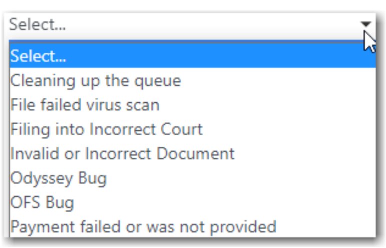


Figure 9.12 – Example of a Drop-Down List

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

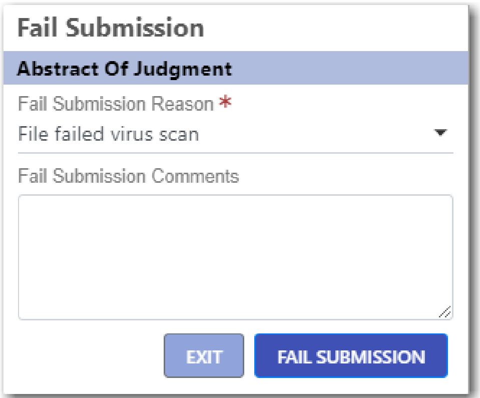


Figure 9.13 – Example of a Fail Submission Dialog Box—Fail Submission Reason Selected

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.

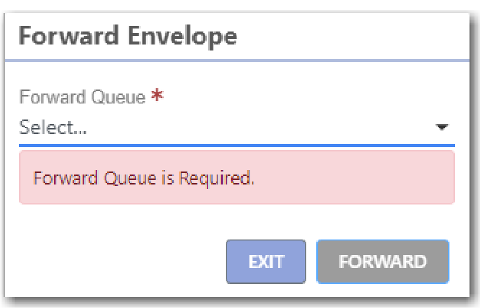


Figure 9.14 – Forward Envelope Dialog Box

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.

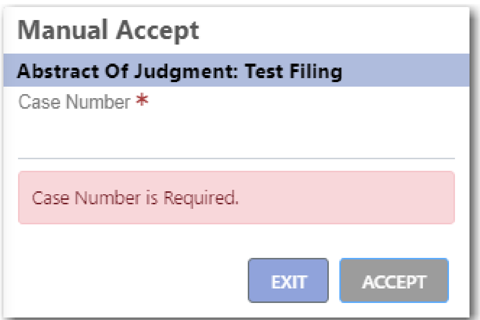


Figure 9.15 – Example of a Manual Accept Dialog Box—Blank

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.

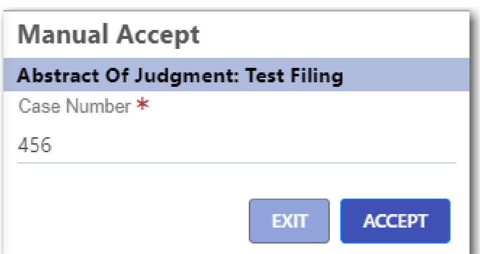


Figure 9.16 – Example of a Manual Accept Dialog Box with the Case Number Added

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.

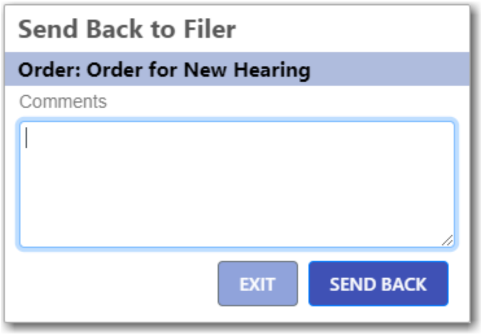


Figure 9.17 – Send Back to Filer Dialog Box

2. If applicable, type any comments in the **Comments** field.
3. When you are satisfied with your comments, click 

. Or, click 

 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.

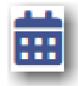
Note: This feature is configured by Tyler and may not be available in your application.

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.

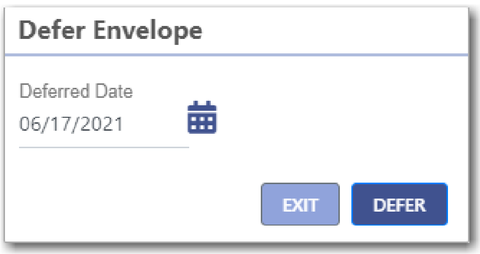


Figure 9.19 – Defer Envelope Window with a Date Selected

4. Click 

.

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

10 Review History

Topics covered in this chapter

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.

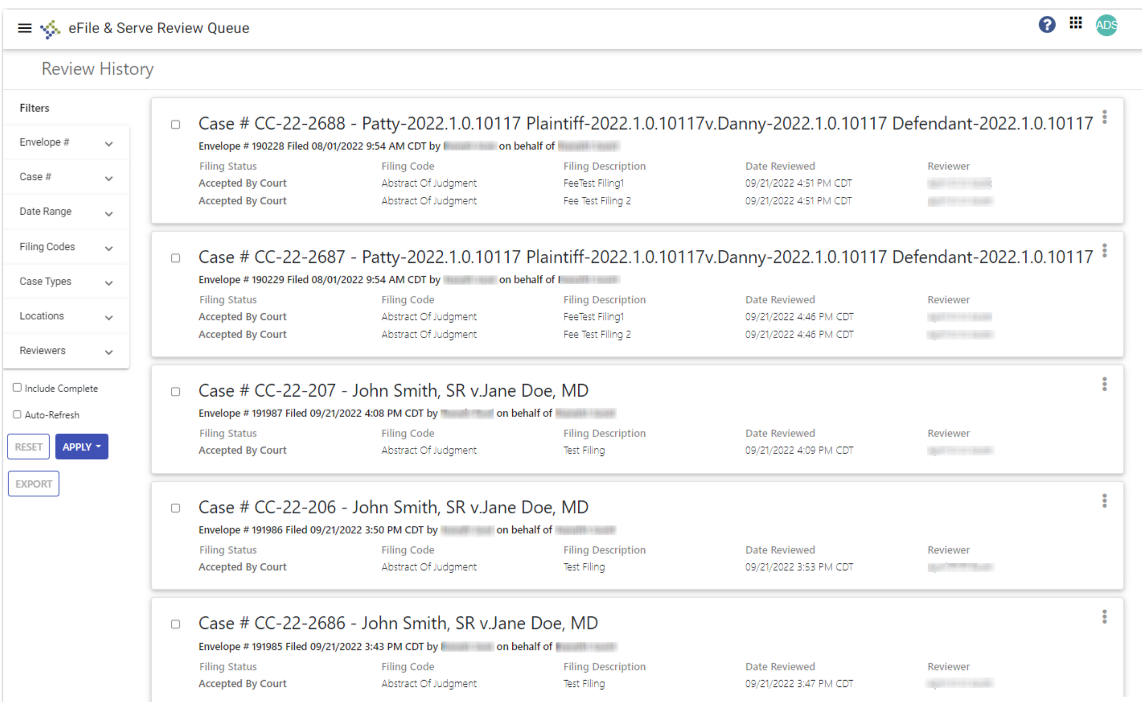


Figure 10.1 – Example of a Review History Page

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

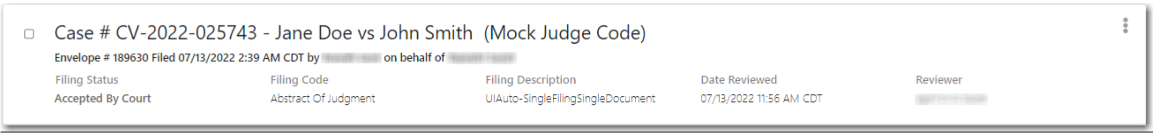


Figure 10.2 – Example of an Envelope Card with the Judge's Name Displayed

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.

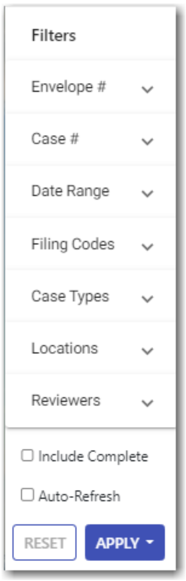


Figure 10.3 – Example of a Filters Pane

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.

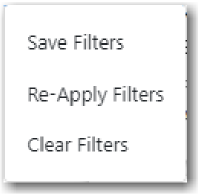


Figure 10.4 – Apply Action Menu

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.

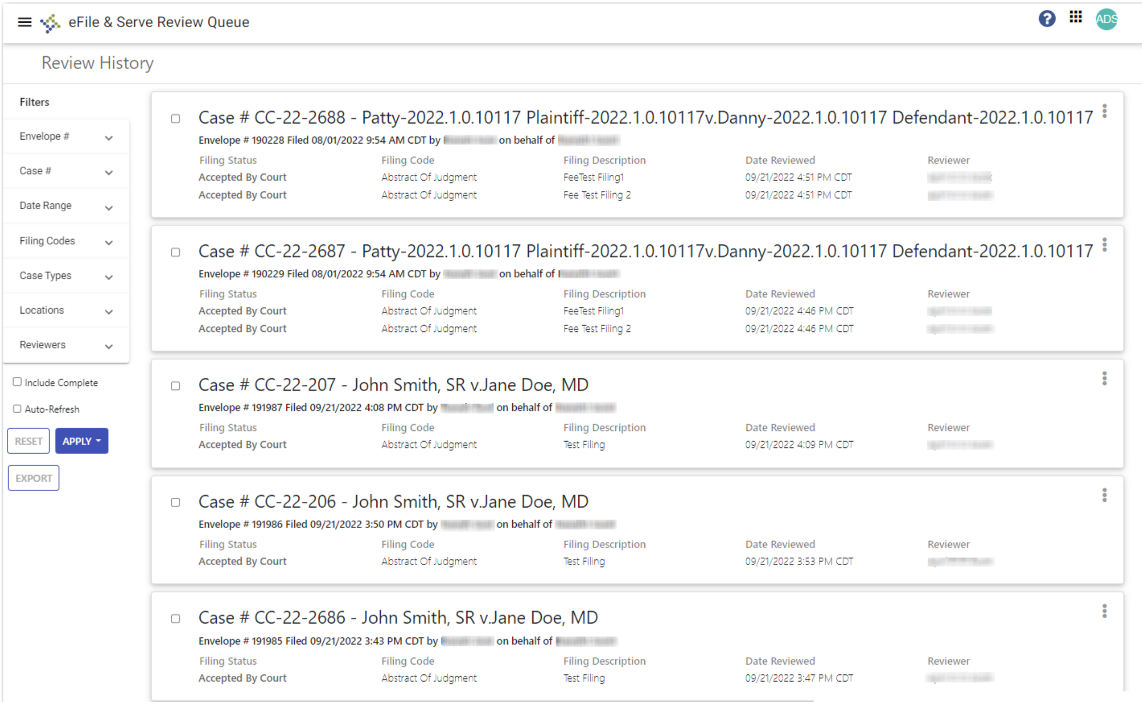


Figure 10.5 – Example of a Review History Page

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

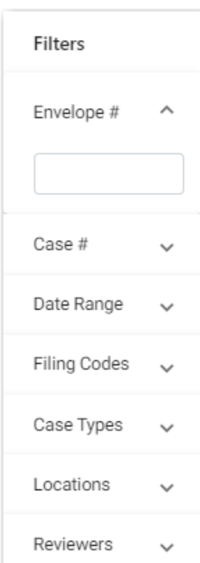
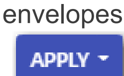


Figure 10.6 – Envelope # Pane in the Filters Pane

4. 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.

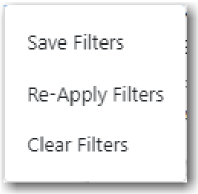


Figure 10.7 – Apply Action Menu

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.

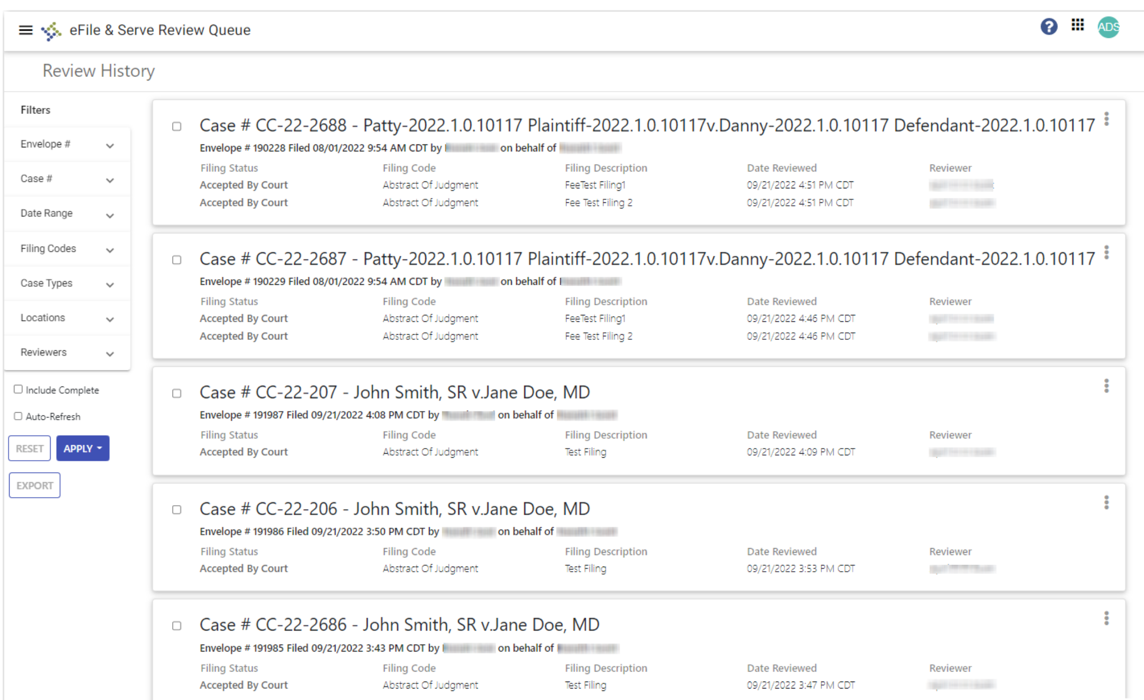


Figure 10.8 – Example of a Review History Page

3. In the Filters pane, expand the Case # pane. Then, type the number of the case that you want to view.

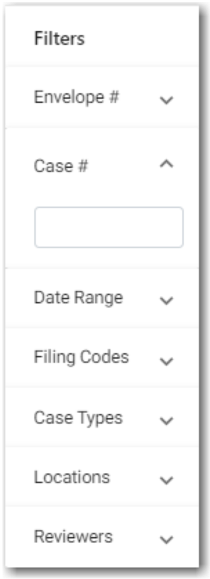


Figure 10.9 – Case# Pane in the Filters Pane

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.

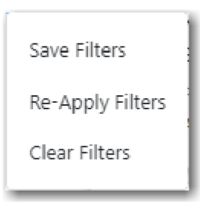


Figure 10.10 – Apply Action Menu

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.

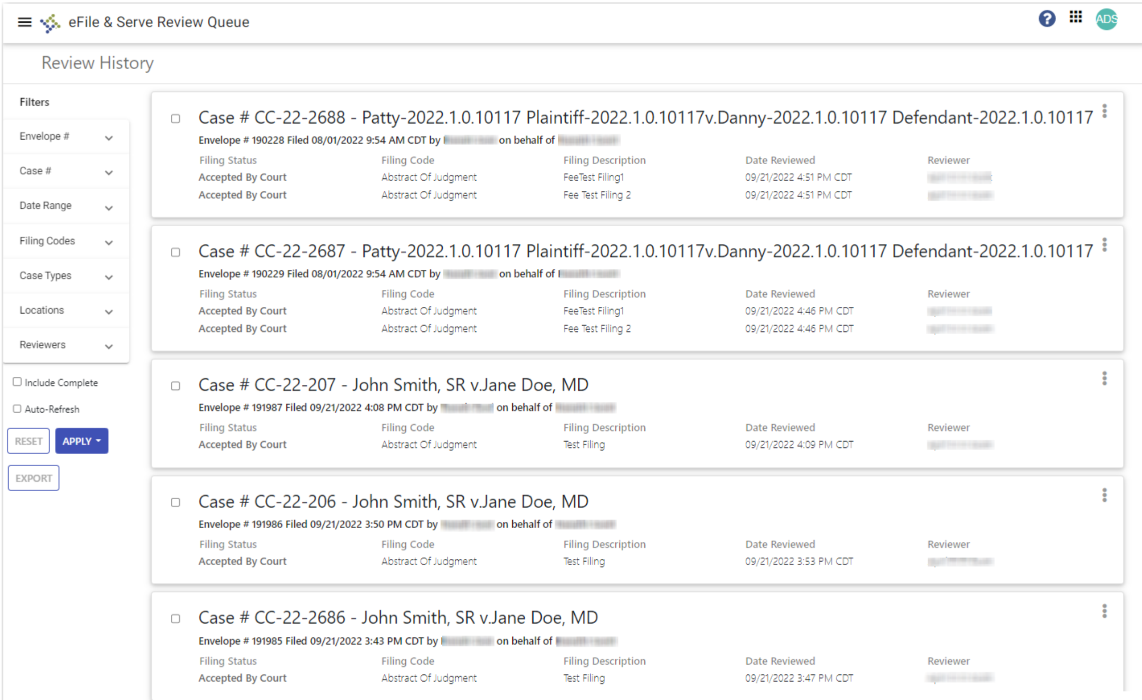


Figure 10.11 – Example of a Review History Page

3. In the Filters pane, in the Date Range pane, select the dates for which you want to view the filings.

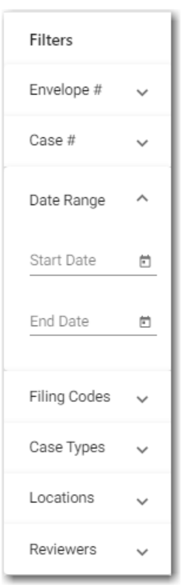


Figure 10.12 – Filters Pane with Date Range

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

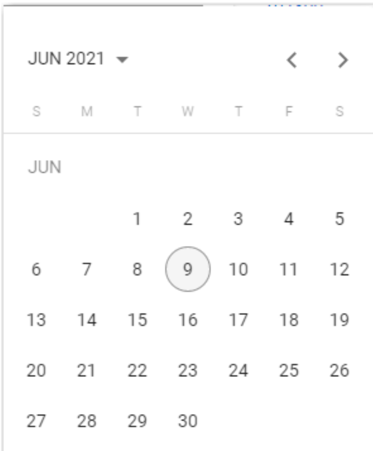
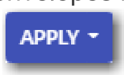


Figure 10.13 – Example of a Calendar

5. 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.

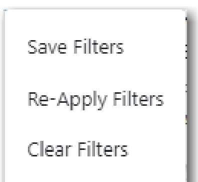


Figure 10.14 – Apply Action Menu

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:

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.

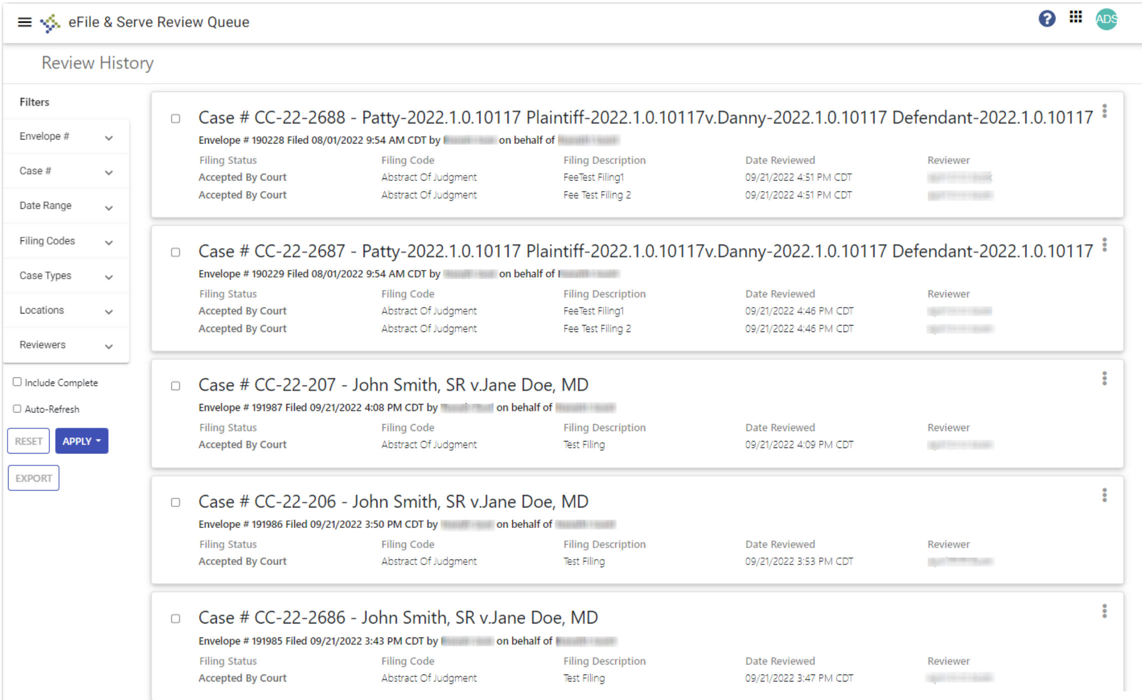


Figure 10.15 – Example of a Review History Page

3. 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.

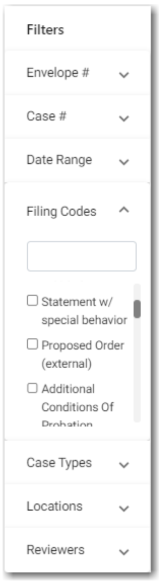


Figure 10.16 – Filing Codes Pane in the Filters Pane

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.

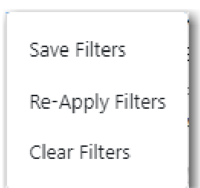


Figure 10.17 – Apply Action Menu

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.

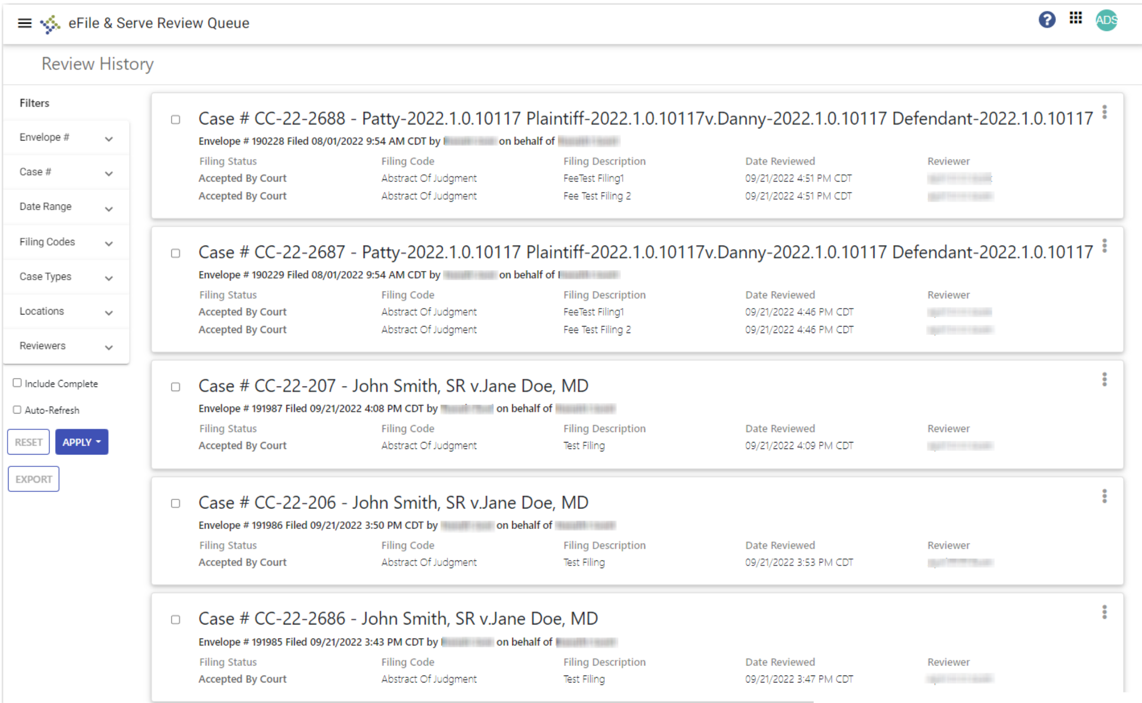


Figure 10.18 – Example of a Review History Page

3. 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.

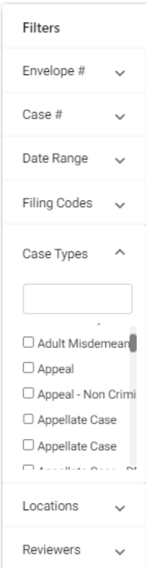


Figure 10.19 – Case Types Pane in the Filters Pane

4. 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.

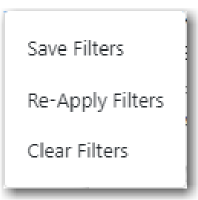


Figure 10.20 – Apply Action Menu

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:

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.

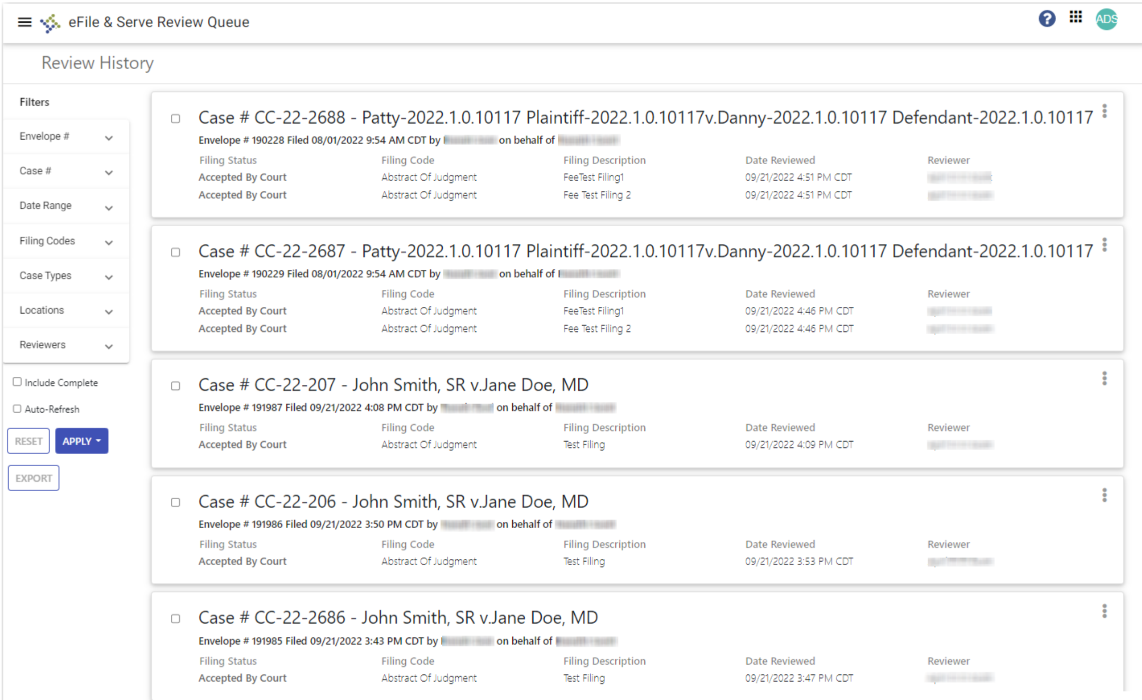


Figure 10.21 – Example of a Review History Page

3. 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.

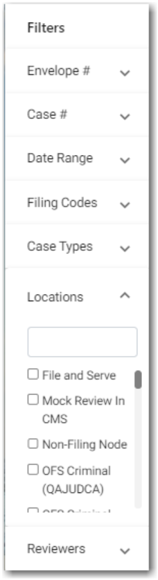


Figure 10.22 – Locations Pane in the Filters Pane

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.

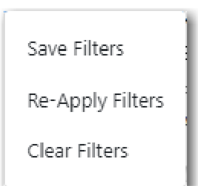


Figure 10.23 – Apply Action Menu

   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.

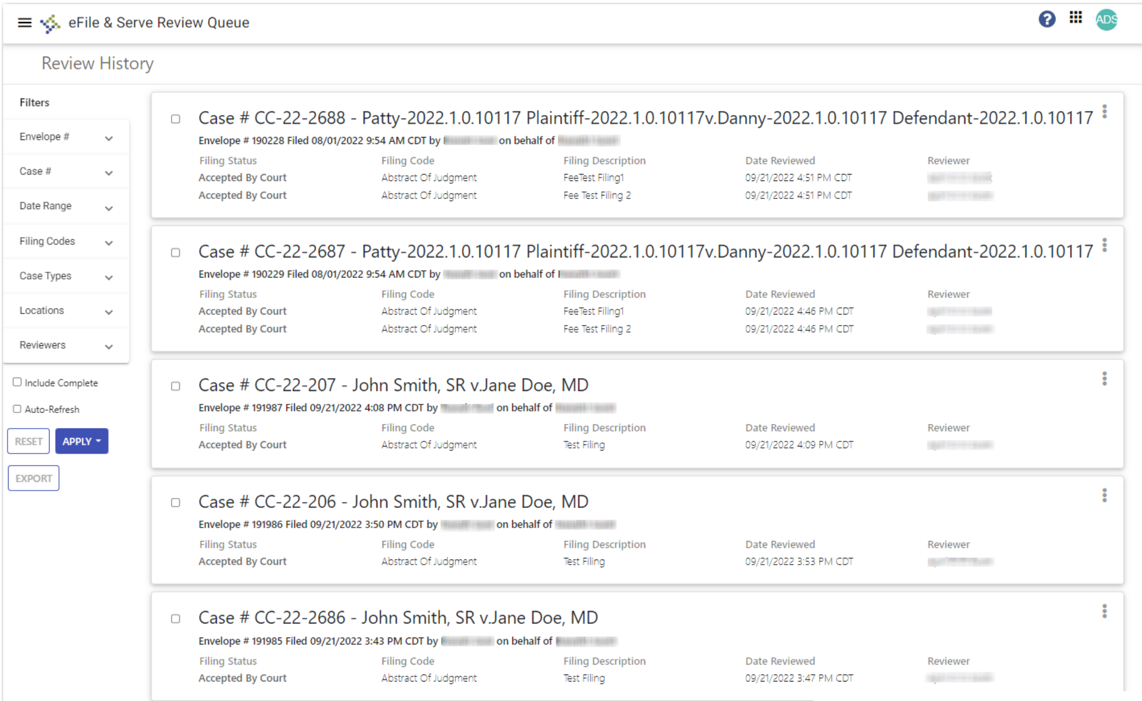


Figure 10.24 – Example of a Review History Page

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.

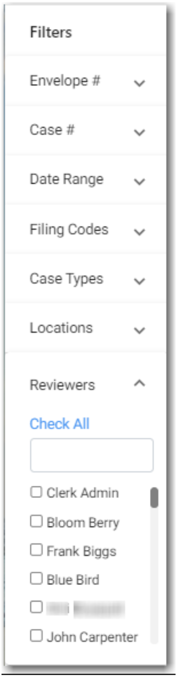


Figure 10.25 – Reviewers Pane in the Filters Pane

4. If you want to see the filings that a specified reviewer has completed, select the **Include Complete** check box. Then, click 

.

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

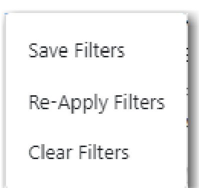


Figure 10.26 – Apply Action Menu

The filings for the reviewer whom you selected in your filter are displayed in the review history.

Note: To clear all selected filters, click 

.

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**.

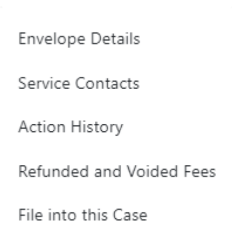


Figure 10.27 – Example of an Action Menu

The *Envelope Detail* page is displayed.

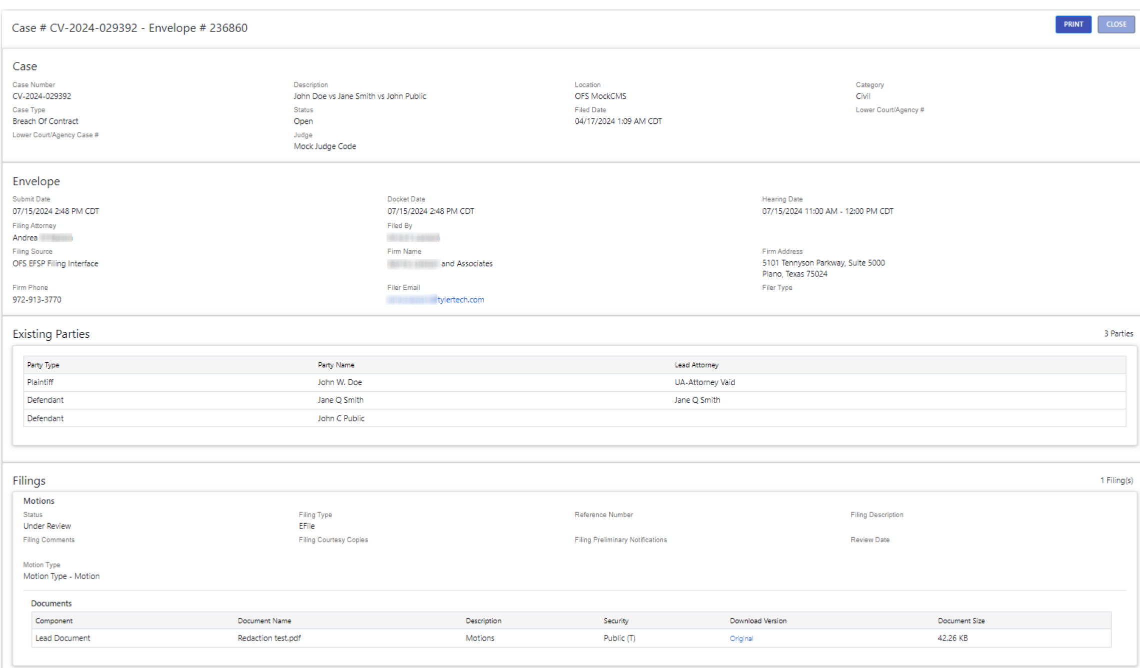


Figure 10.28 – Example of an Envelope Detail Page

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

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.

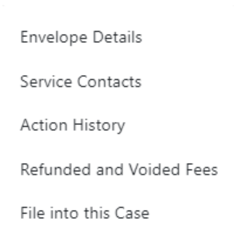


Figure 10.29 – Example of an Action Menu

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

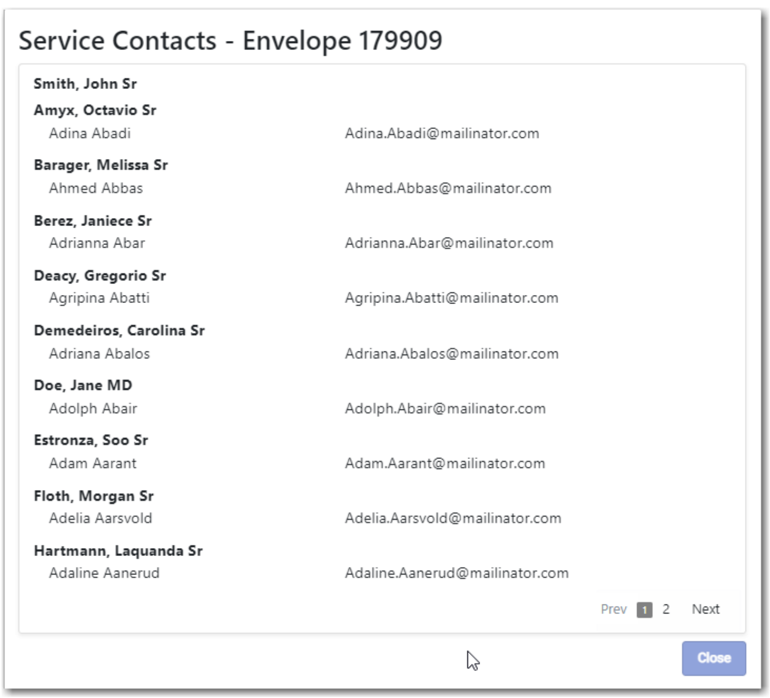


Figure 10.30 – Example of a Service Contacts Window

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.

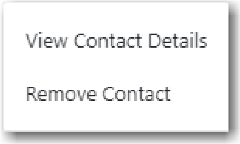


Figure 10.31 – Service Contact Action Menu

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.

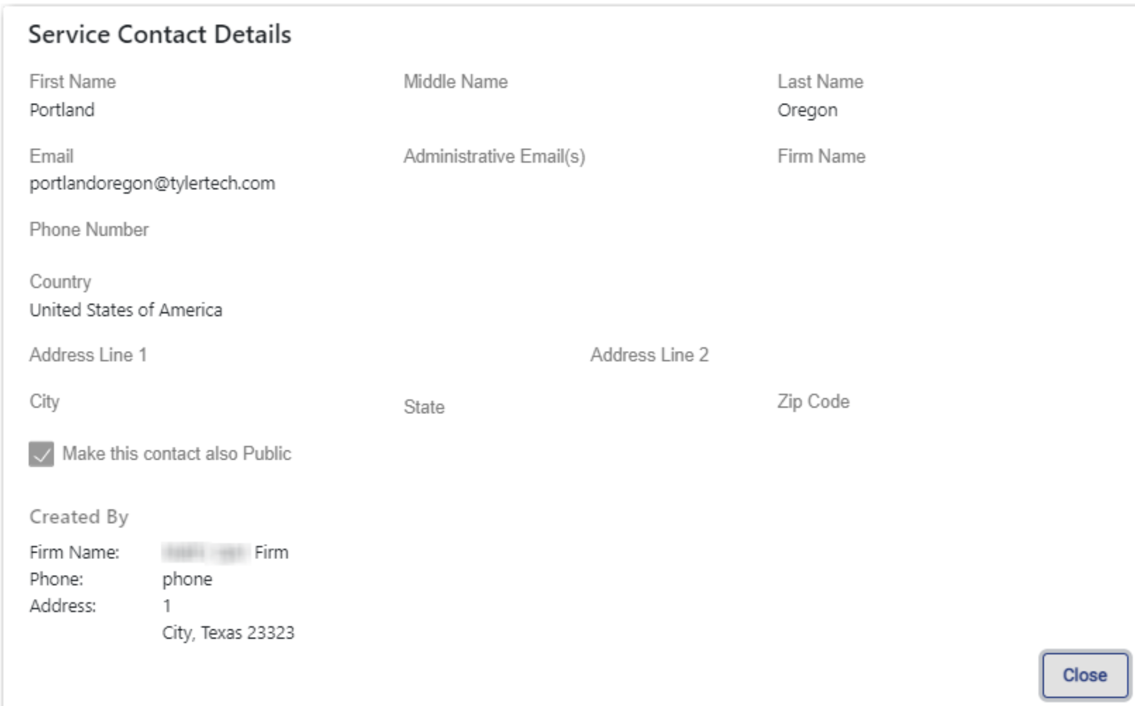


Figure 10.32 – Example of a Service Contact Details Window

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.

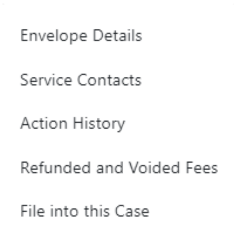
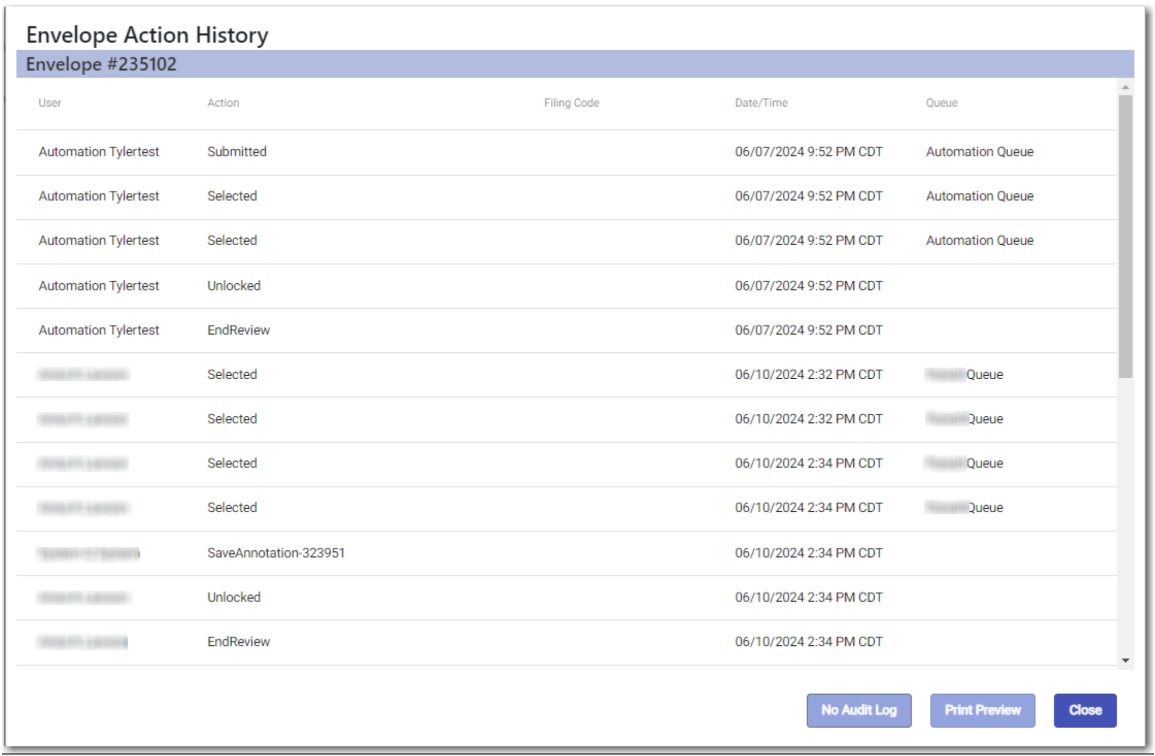


Figure 10.33 – Example of an Action Menu

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	
[illegible]	Selected		06/10/2024 2:32 PM CDT	[illegible] Queue
[illegible]	Selected		06/10/2024 2:32 PM CDT	[illegible] Queue
[illegible]	Selected		06/10/2024 2:34 PM CDT	[illegible] Queue
[illegible]	Selected		06/10/2024 2:34 PM CDT	[illegible] Queue
[illegible]	SaveAnnotation-323951		06/10/2024 2:34 PM CDT	
[illegible]	Unlocked		06/10/2024 2:34 PM CDT	
[illegible]	EndReview		06/10/2024 2:34 PM CDT	

No Audit Log Print Preview Close

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.

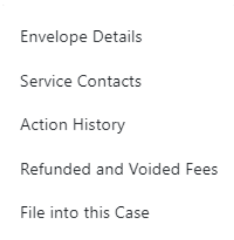


Figure 10.35 – Example of an Action Menu

The *Refunded and Voided Fees* dialog box is displayed.

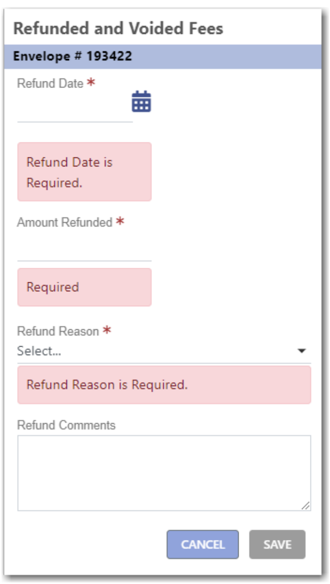


Figure 10.36 – Example of a Refunded and Voided Fees Dialog Box

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.

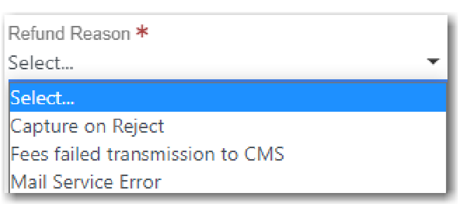


Figure 10.37 – Example of a Refund Reason Drop-Down List

6. If you have any comments to add, type them in the **Refund Comments** field.

7. Click **Save**.

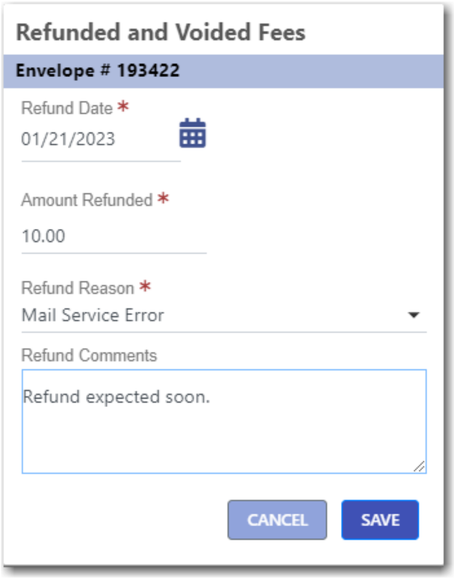


Figure 10.38 – Example of a Refunded and Voided Fees Dialog Box with Information Added

> **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**.

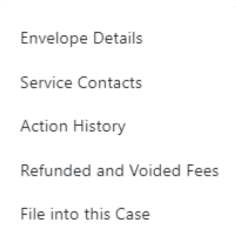


Figure 10.39 – Example of an Action Menu

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

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.

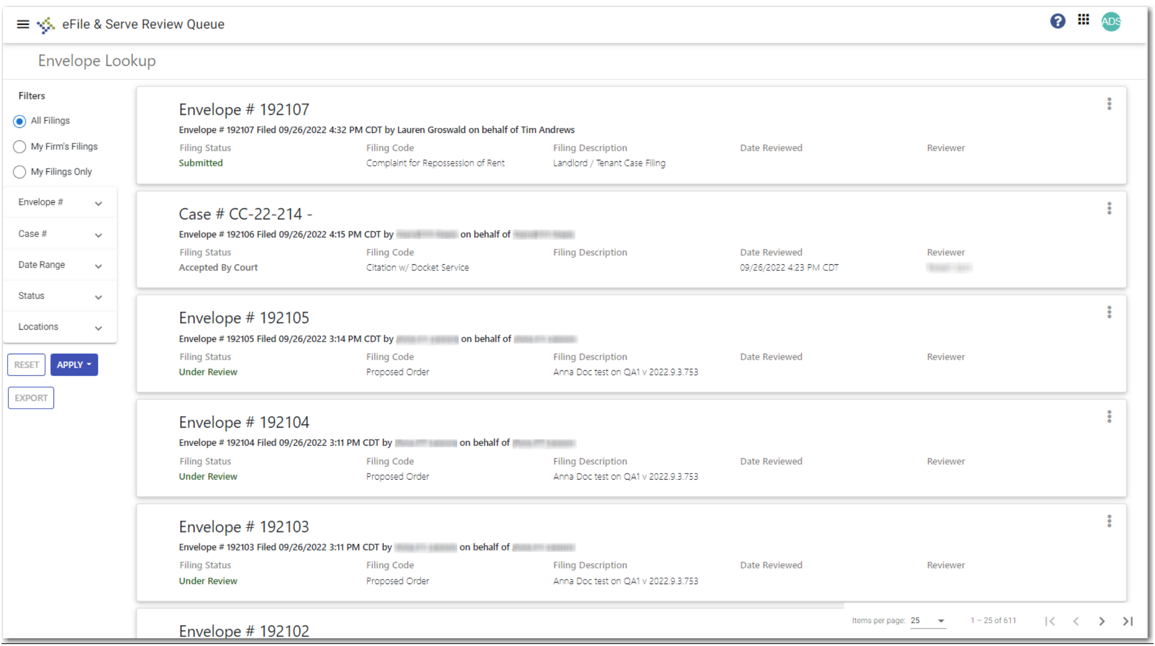


Figure 11.1 – Example of an Envelope Lookup Page

Envelopes for proposed orders also include the judge's name on the card (displayed in parentheses).

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.

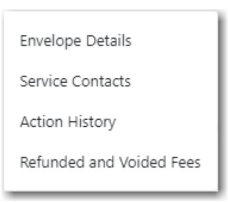


Figure 11.3 – Example of an Action Menu

The *Envelope Detail* page is displayed.

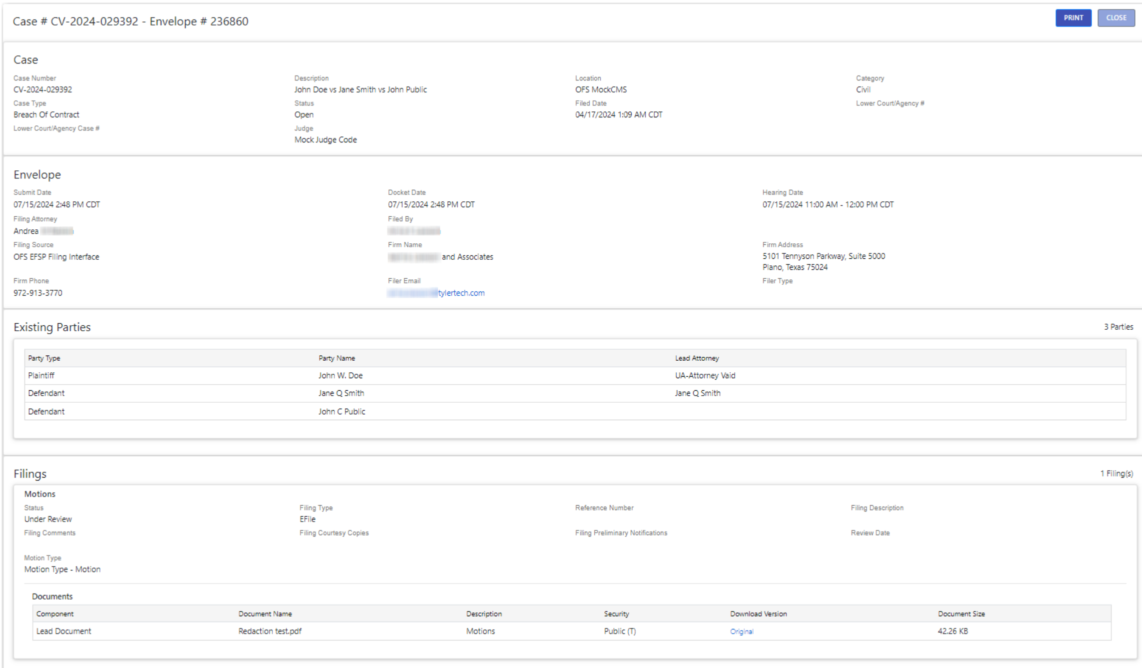


Figure 11.4 – Example of an Envelope Detail Page

3. Click 

if you want to print the envelope details. Then, click 

to return to the *Review History* page.

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.

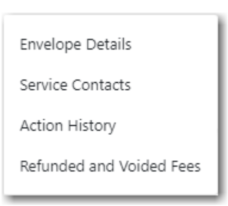


Figure 11.5 – Example of an Action Menu

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

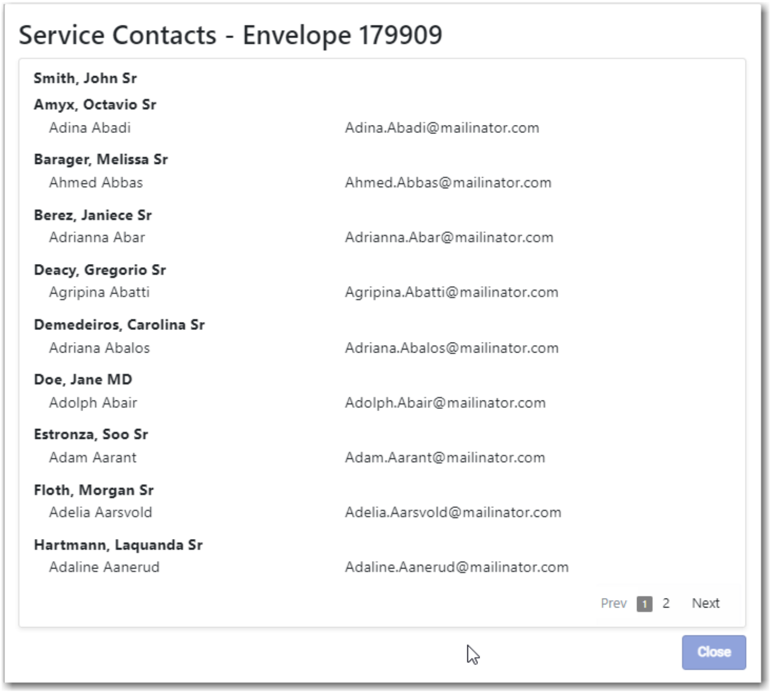
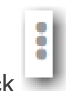


Figure 11.6 – Example of a Service Contacts Window

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.

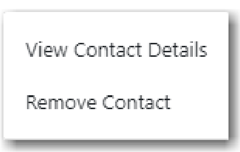


Figure 11.7 – Example of a Service Contact Action Menu

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.

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.

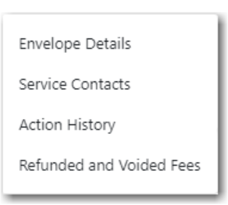


Figure 11.9 – Example of an Action Menu

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

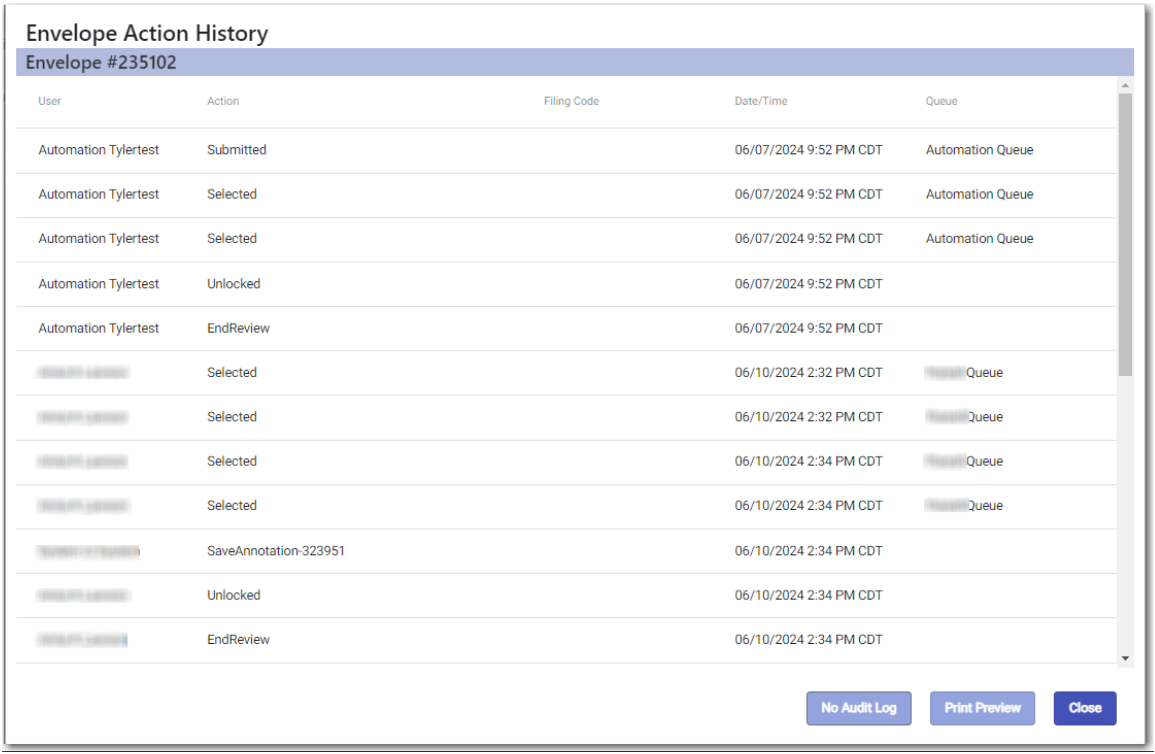


Figure 11.10 – Example of an Envelope Action History Window

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.

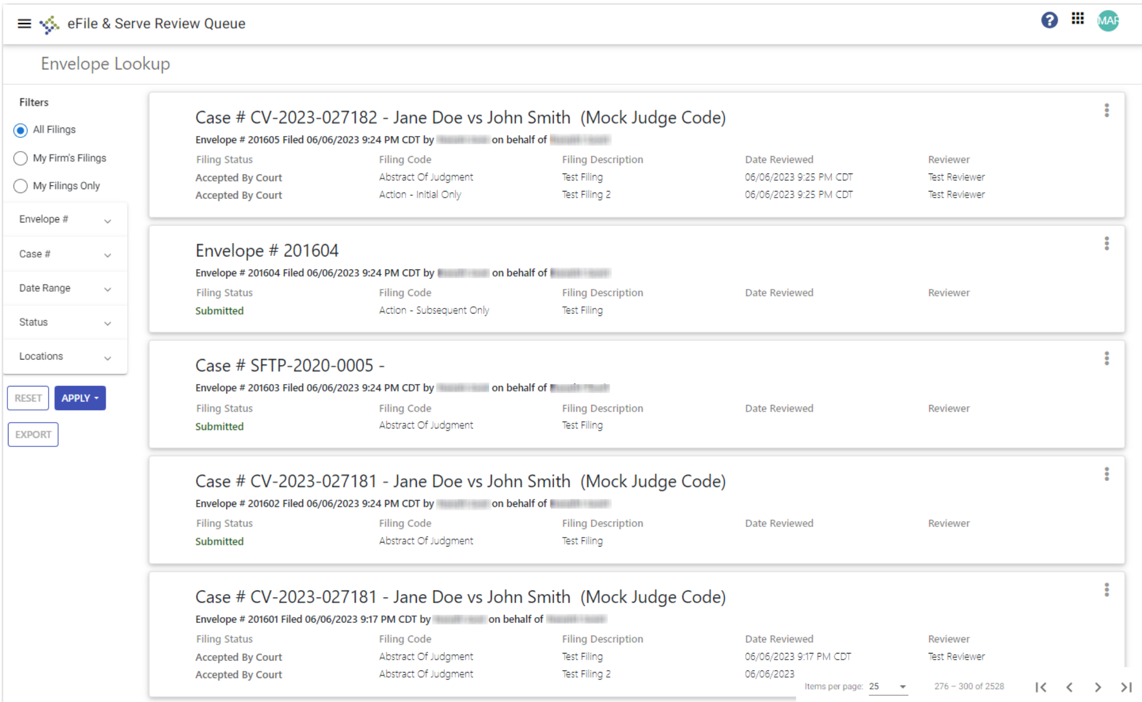


Figure 11.11 – Example of an Envelope Lookup Page

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.

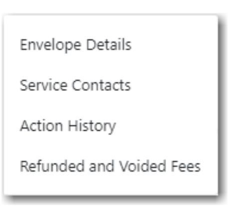


Figure 11.12 – Example of an Action Menu

The *Refunded and Voided Fees* dialog box is displayed.

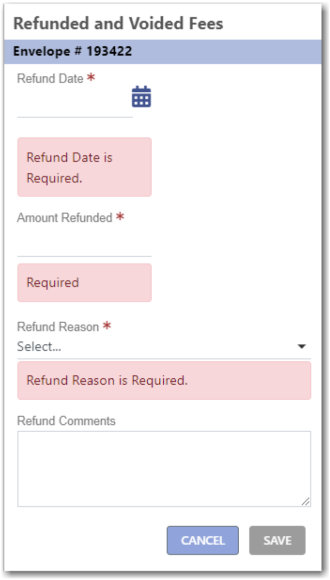


Figure 11.13 – Example of a Refunded and Voided Fees Dialog Box

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.

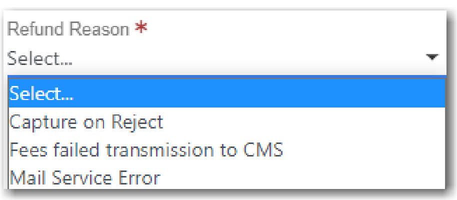


Figure 11.14 – Example of a Refund Reason Drop-Down List

6. If you have any comments to add, type them in the **Refund Comments** field.
7. Click **Save**.

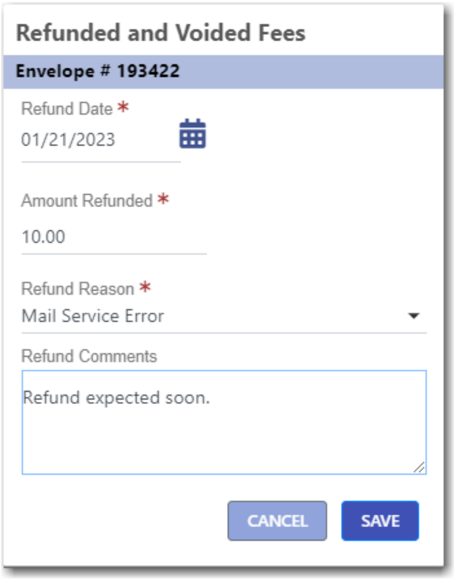


Figure 11.15 – Example of a Refunded and Voided Fees Dialog Box with Information Added

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

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.

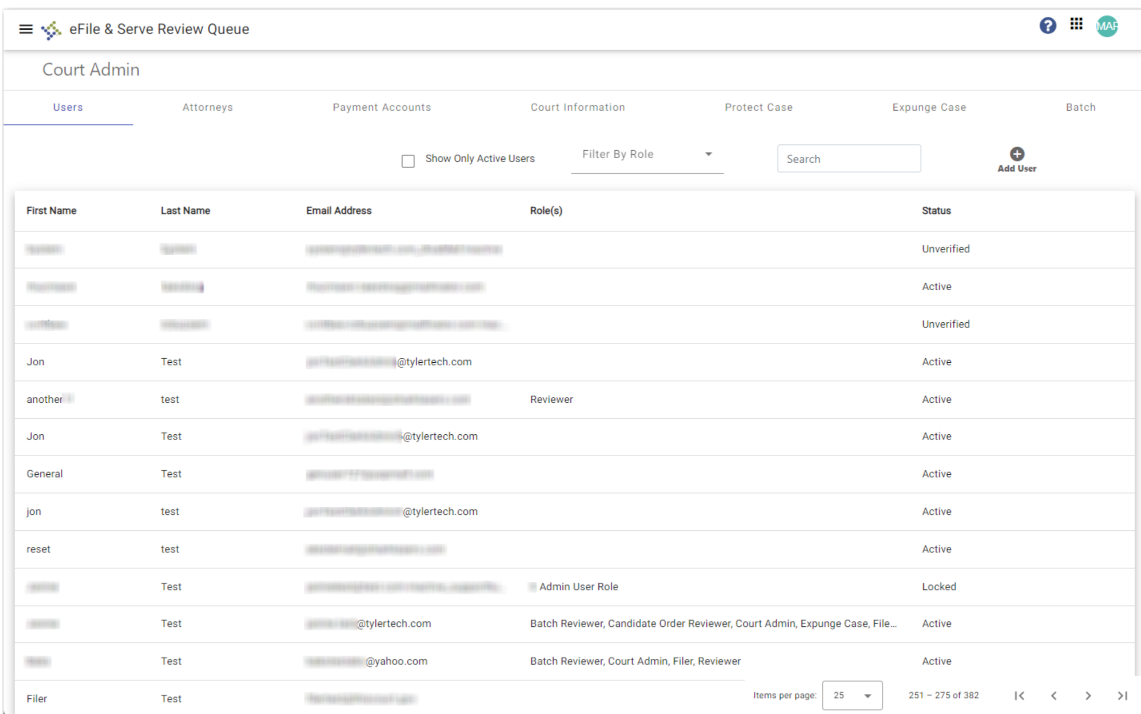


Figure 12.1 – Example of a Court Admin Page

The Court Administrator is responsible for the following functions:

- Approve or reject new users
- Manage court users
- Modify user accounts

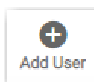
- Expunge a case
- Protect a case
- Unprotect a case
- Unlock a locked envelope or a locked batch in the queue
- Restart a batch if envelopes are stuck in processing
- Filter envelopes by reviewer on the *Review History* page
- Update firm information
- Manage user roles

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.

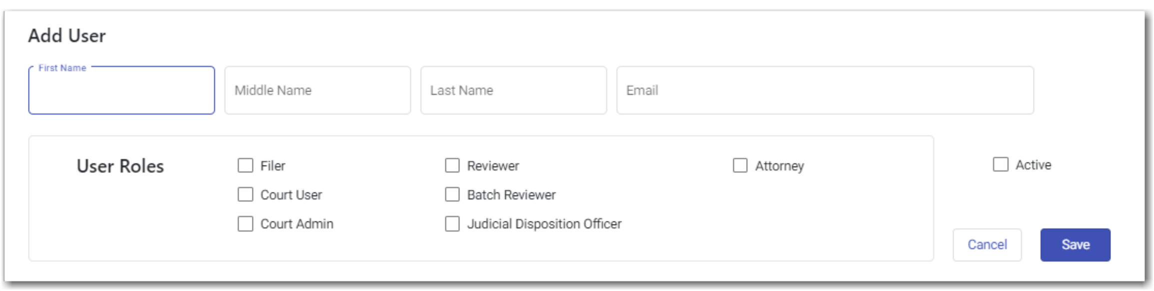


Figure 12.2 – Add User Dialog Box

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.

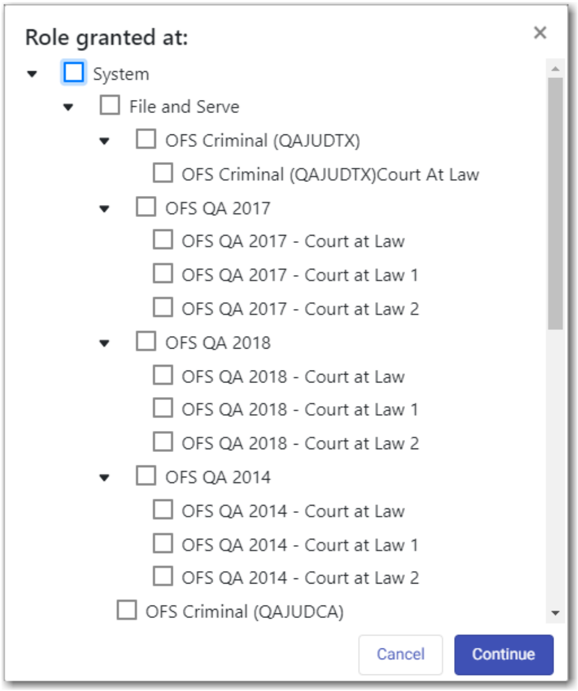


Figure 12.3 – Role Granted At Dialog Box

3. Select the locations where you want the new user to have roles. Then, click 

.
4. Select the **Active** check box to place the user in an active status.
5. Click 

.

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.

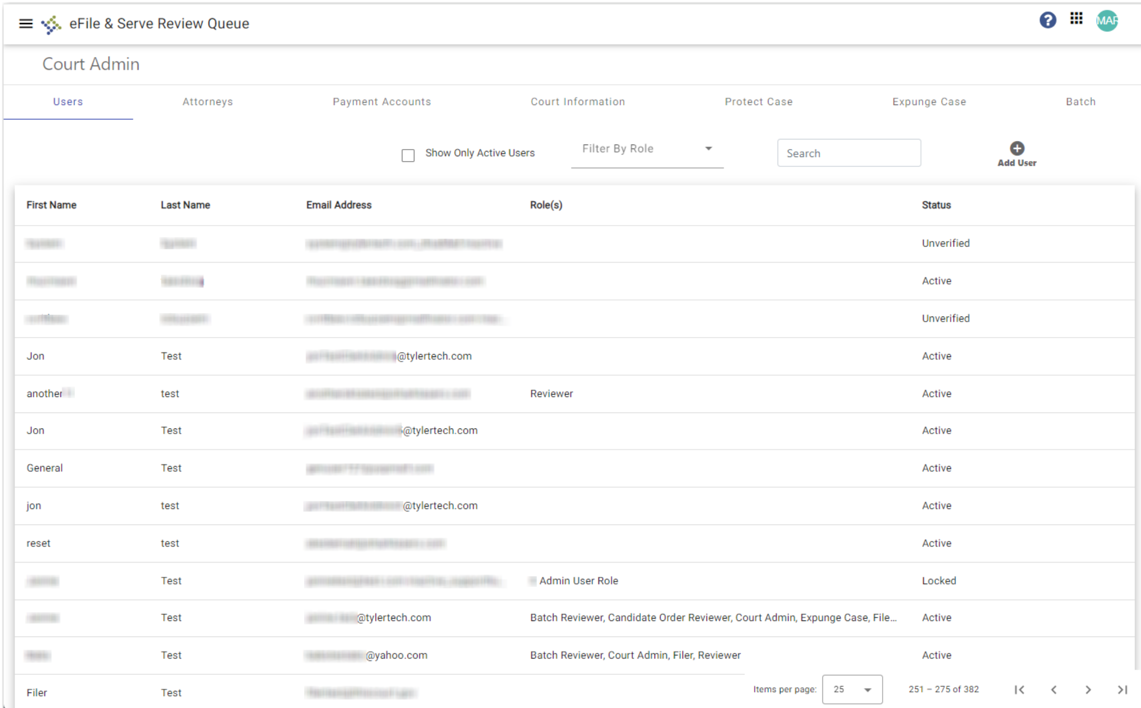
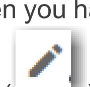


Figure 12.4 – Example of a Court Admin Page

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.

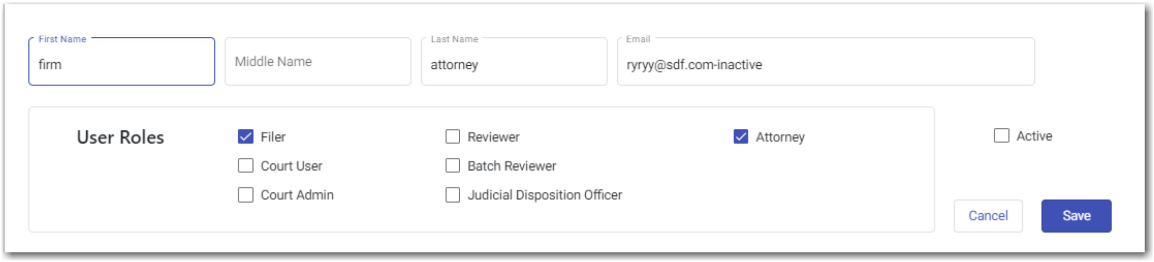


Figure 12.5 – Example of a Court User Dialog Box

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.

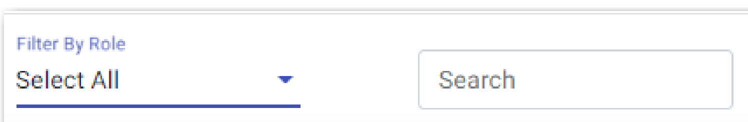


Figure 12.6 – Filter By Role Drop-Down List and Search Field

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.

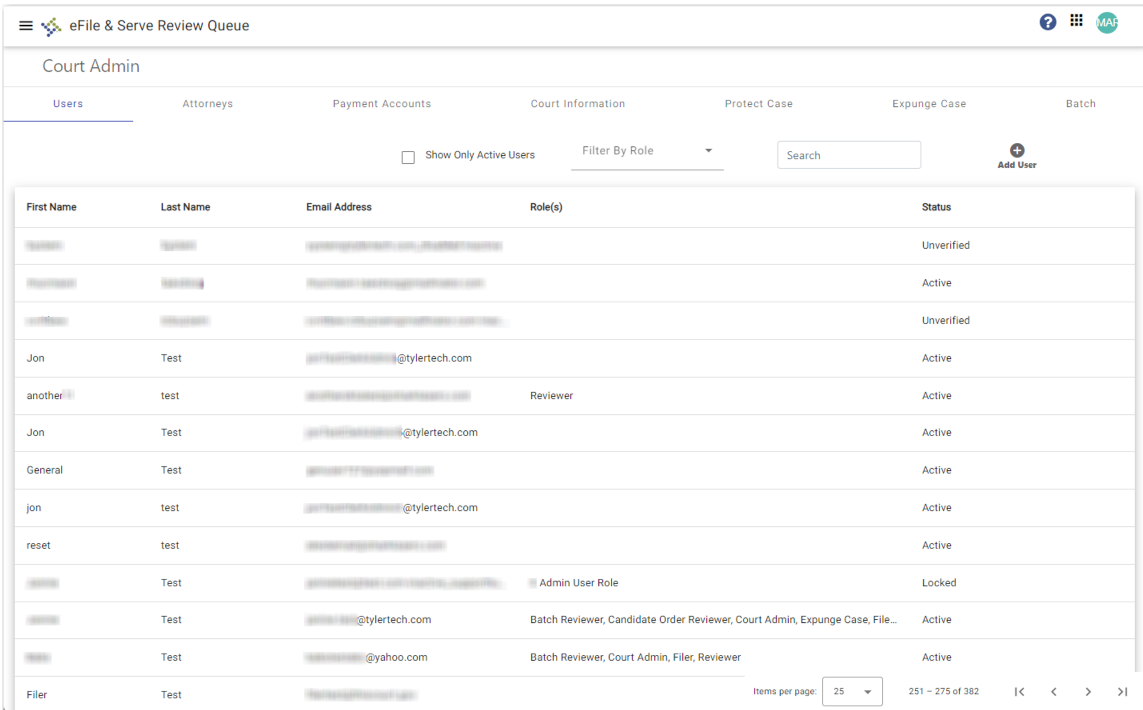


Figure 12.7 – Example of a Court Admin Page

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 OK to continue, or click Cancel 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.

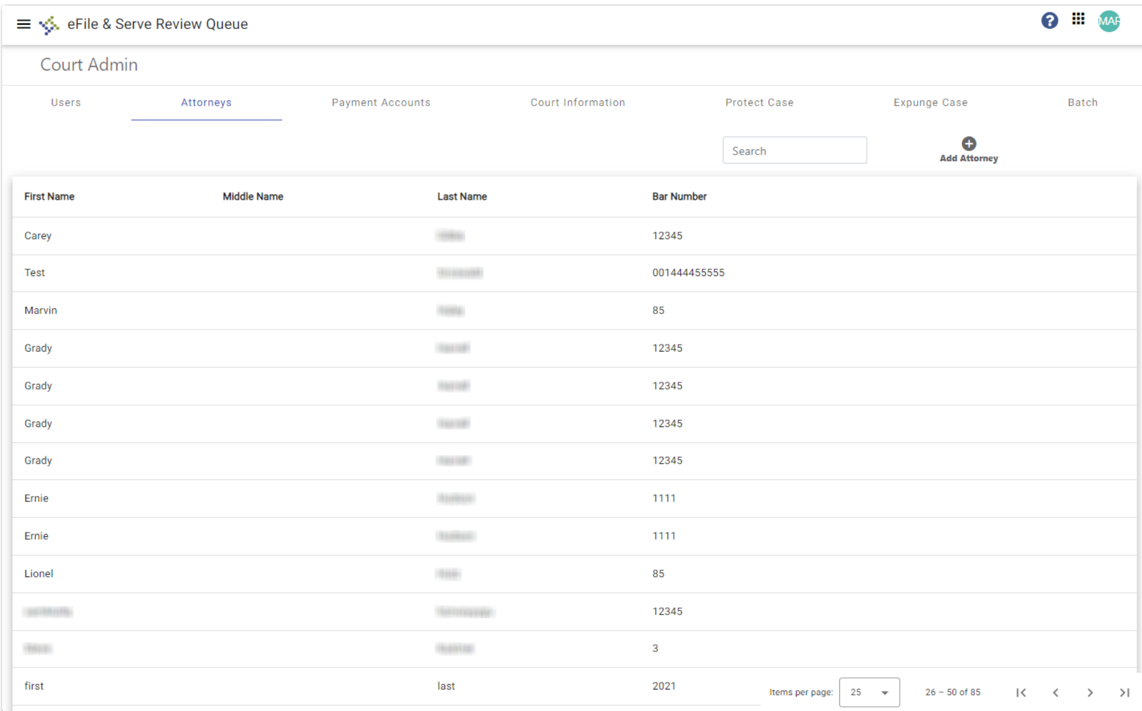


Figure 12.8 – Example of an Attorneys Page—Court Admin Page

2. Click  .

   The *Add Attorney* window is displayed.

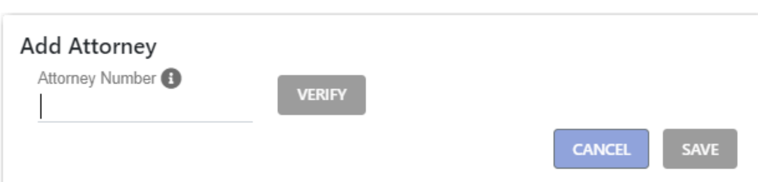


Figure 12.9 – Add Attorney Window

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.

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.

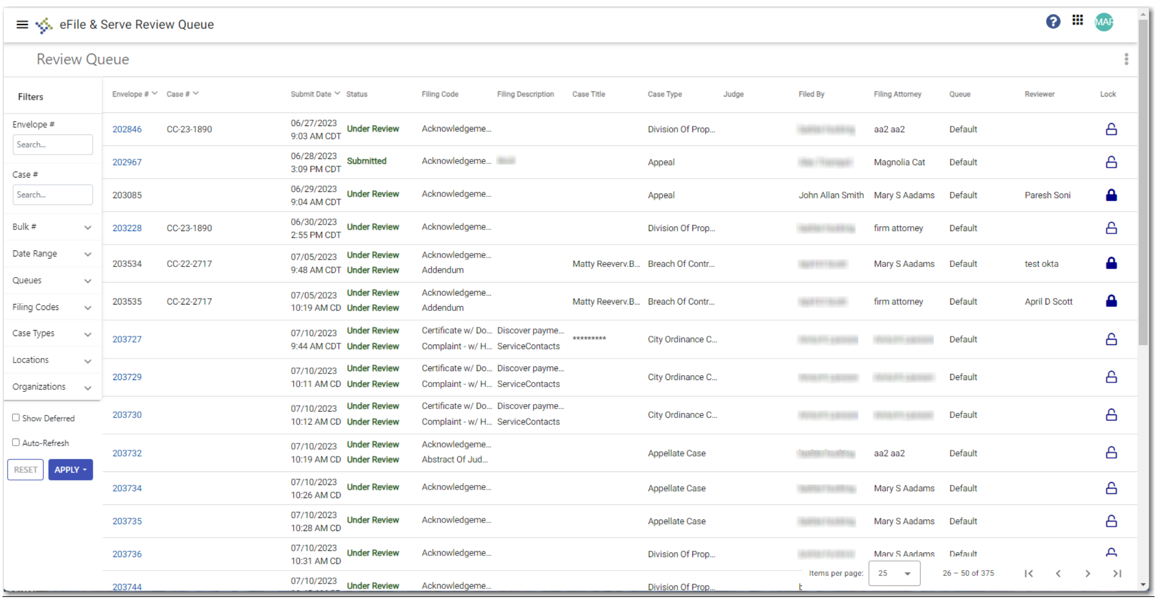
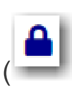
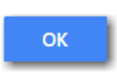


Figure 12.10 – Example of a Review Queue Page

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.

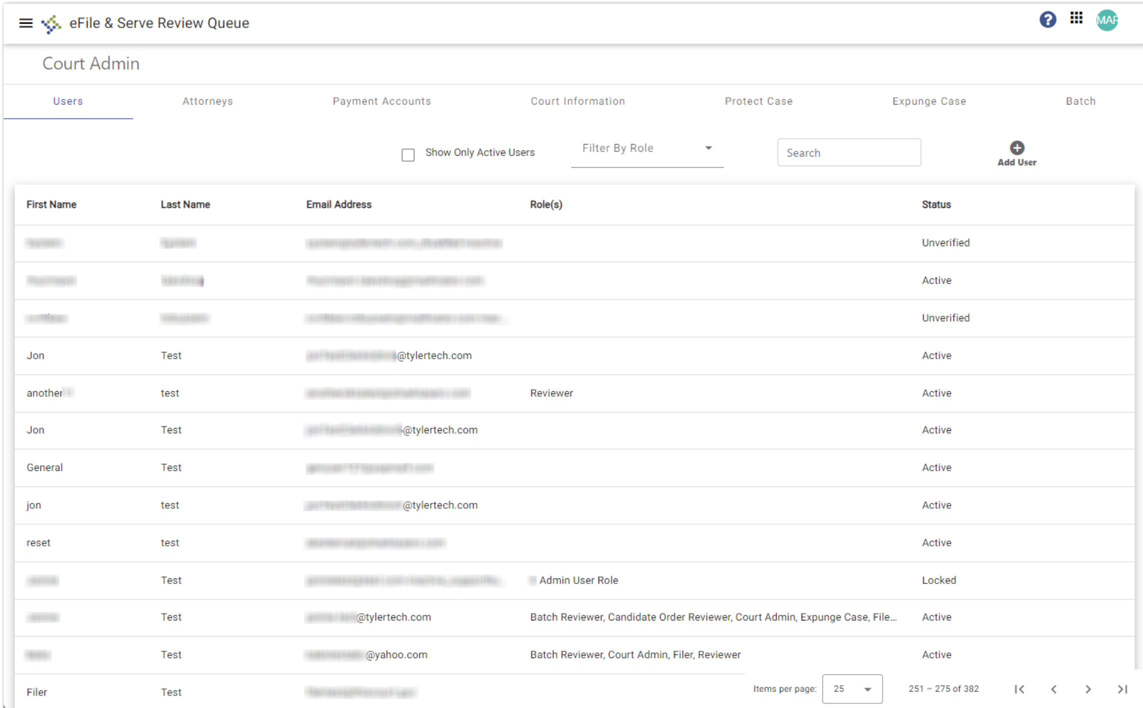


Figure 12.11 – Example of a Court Admin Page

2. On the *Court Admin* page, click **Protect Case**.

   The *Protect Case* page is displayed.

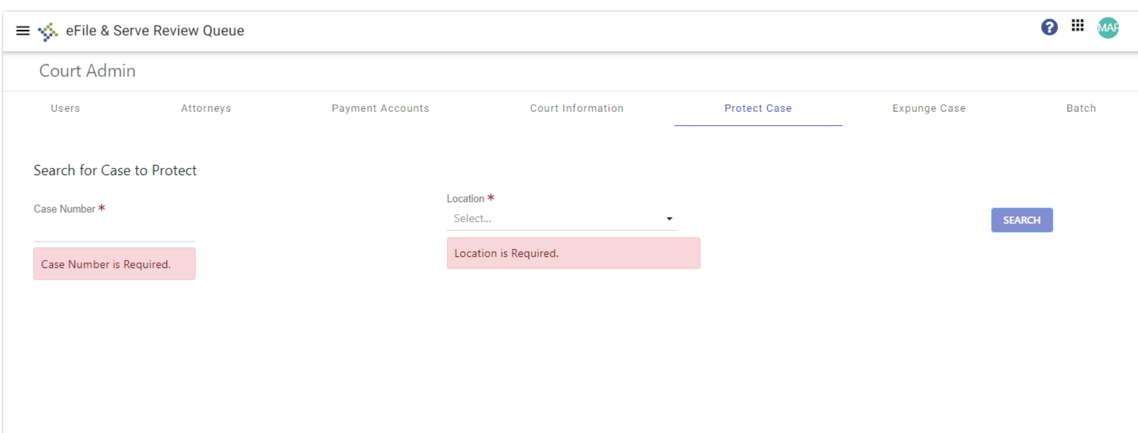


Figure 12.12 – Example of a Protect Case Page

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.

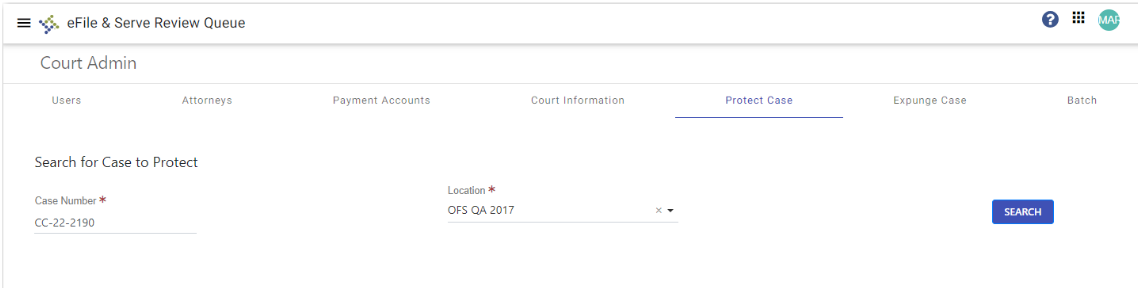


Figure 12.13 – Example of a Protect Case Page with Case Number and Location Displayed

5. Click 

.

   If a case matches your search criteria, the case is displayed.

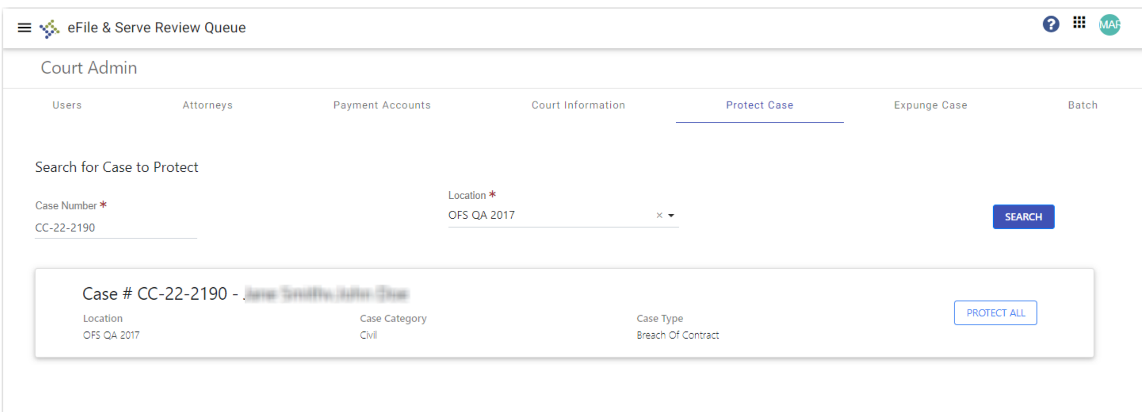


Figure 12.14 – Example of a Case Found on a Case Search

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.

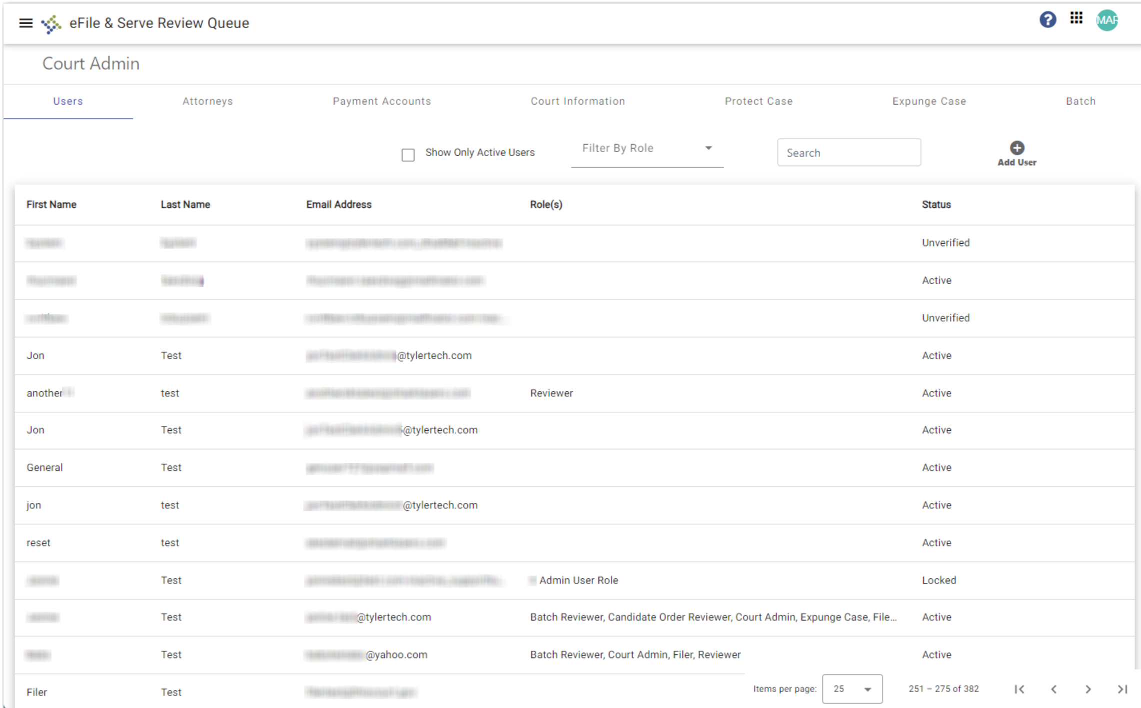


Figure 12.15 – Example of a Court Admin Page

2. On the *Court Admin* page, click **Protect Case**.

   The *Protect Case* page is displayed.

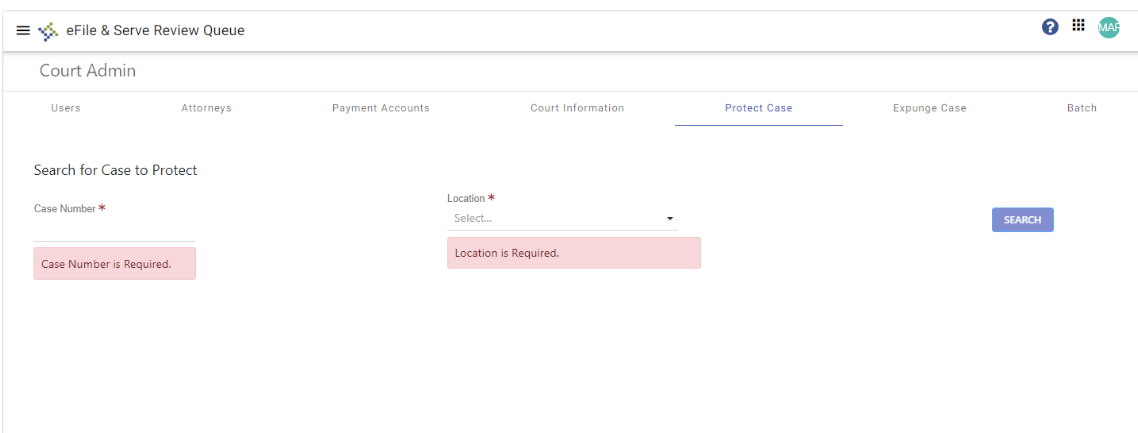


Figure 12.16 – Example of a Protect Case Page

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.

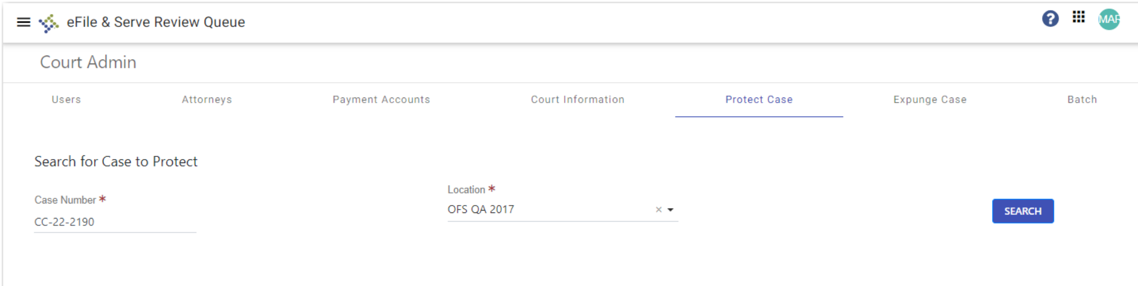


Figure 12.17 – Example of a Protect Case Page with Case Number and Location Displayed

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.

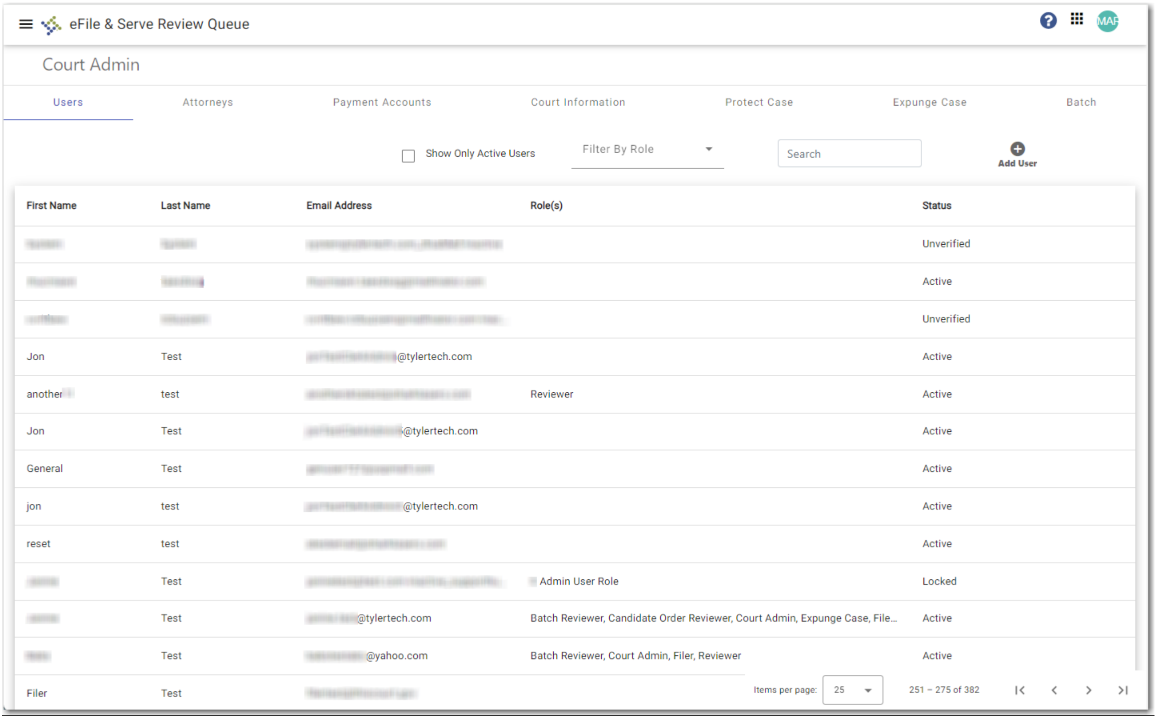


Figure 12.18 – Example of a Court Admin Page

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.

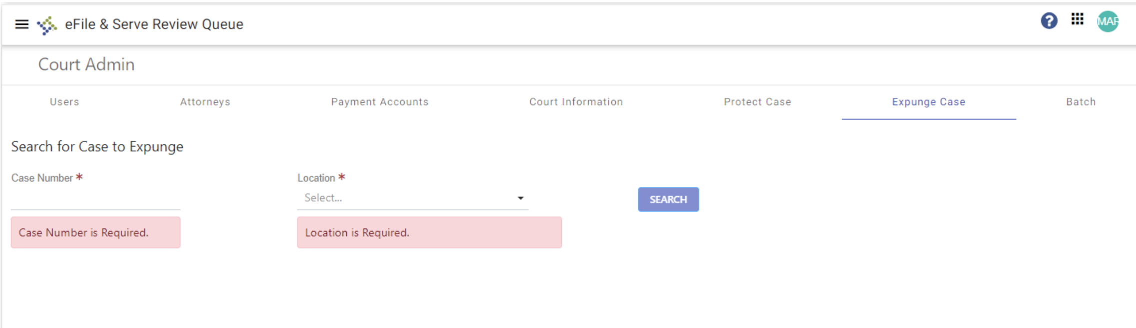


Figure 12.19 – Example of a Search for Case to Expunge Page

2. Type the case number in the **Case Number** field, and then select the location from the **Location** drop-down list. Then, click 

.

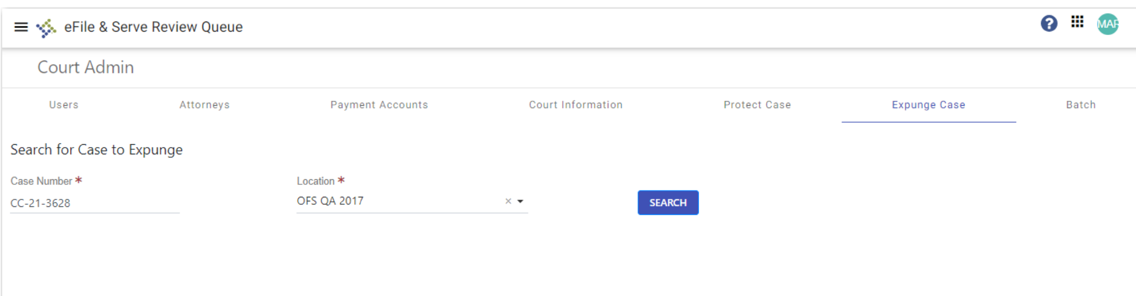


Figure 12.20 – Example of a Search for Case to Expunge Page with Case Number and Location Added

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.

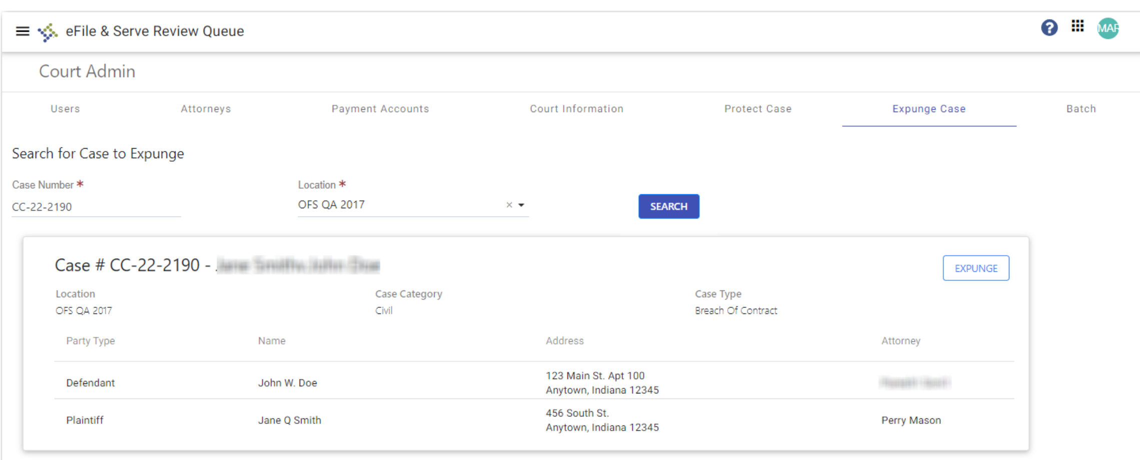


Figure 12.21 – Example of a Case Found on the Search for Case to Expunge Page

3. If the case displayed is the one you want to expunge, click 

.

A confirmation dialog box is displayed.

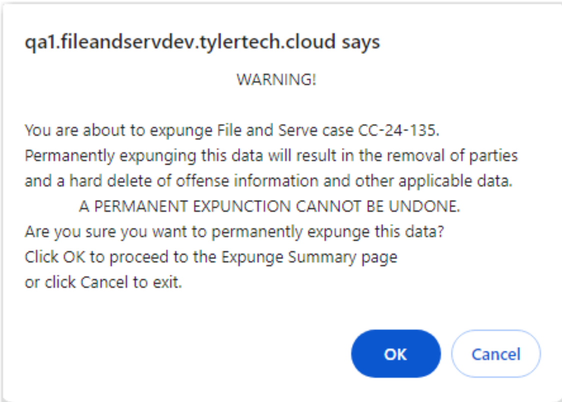
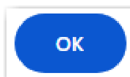


Figure 12.22 – Example of a Confirmation Dialog Box

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.

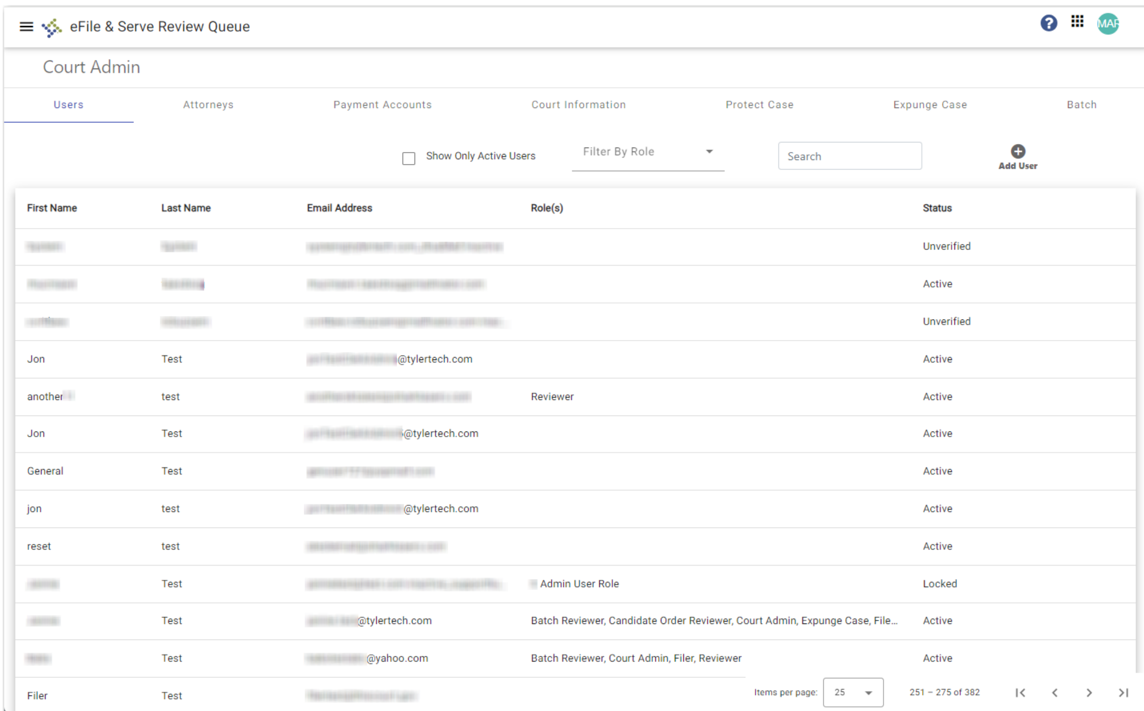


Figure 12.24 – Example of a Court Admin Page

2. On the *Court Admin* page, click **Batch**.

   The *Batch* page is displayed.

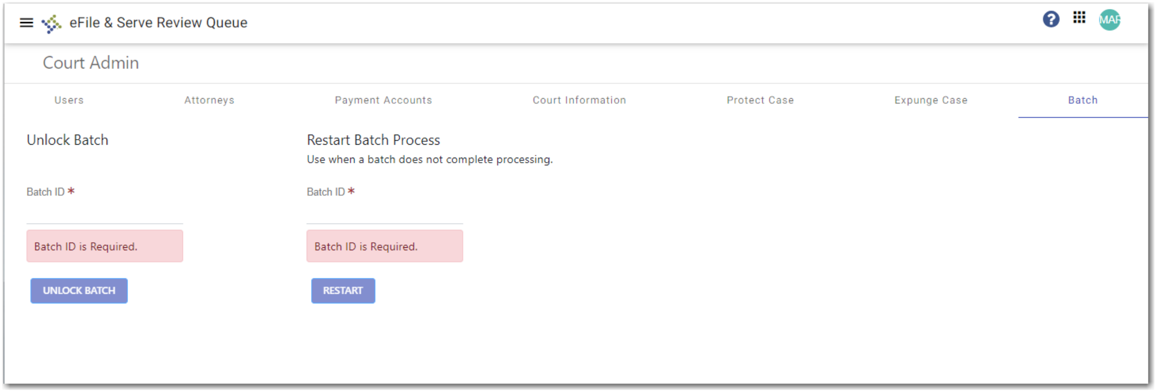


Figure 12.25 – Example of a Batch Page

3. Type the ID number of the batch in the **Batch ID** field.

4. Click 

.

   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.

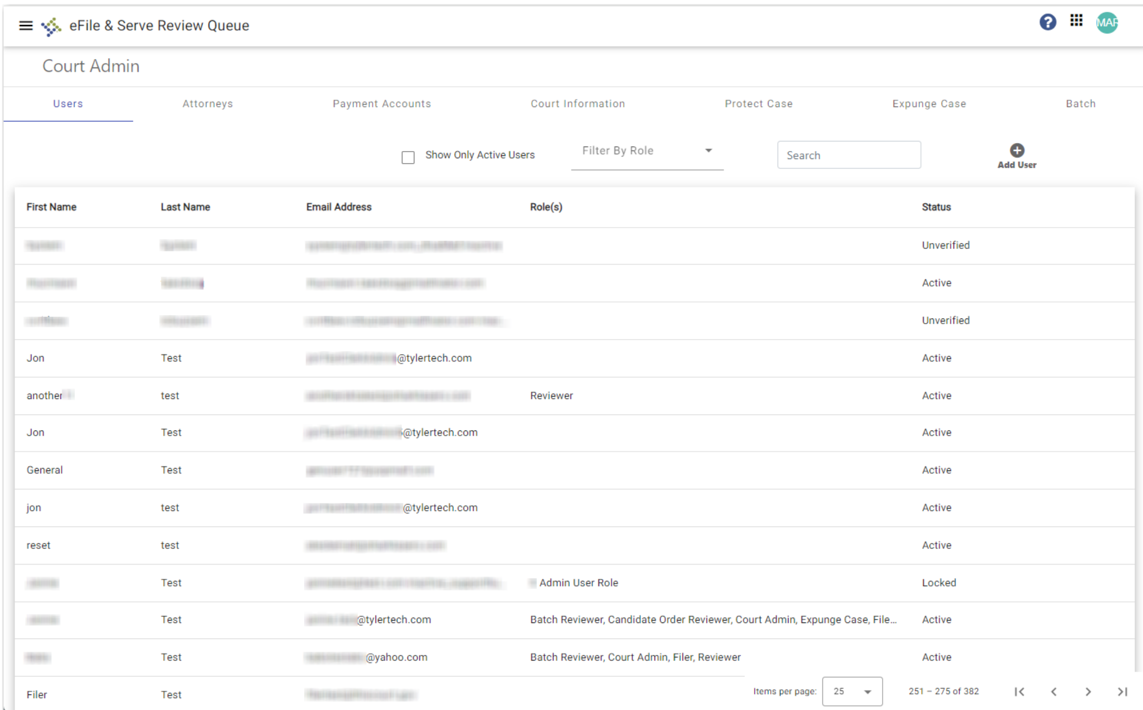


Figure 12.26 – Example of a Court Admin Page

2. On the *Court Admin* page, click **Batch**.

   The *Batch* page is displayed.

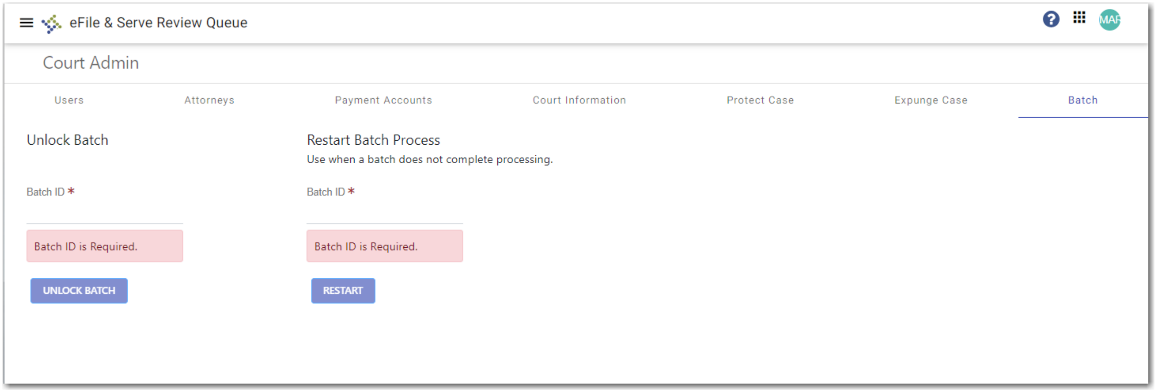


Figure 12.27 – Example of a Batch Page

3. In the **Restart Batch Process** section, type the ID number of the batch in the **Batch ID** field.

4. Click 

.

   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

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.

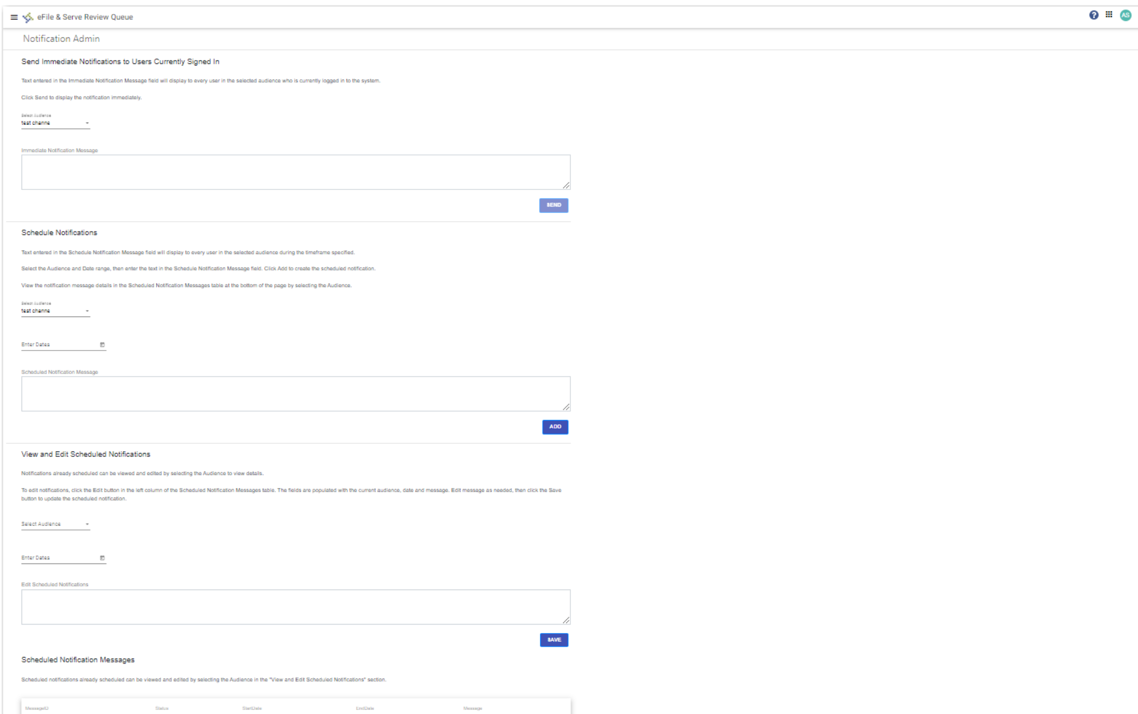


Figure 13.1 – Example of a Notification Admin Page

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

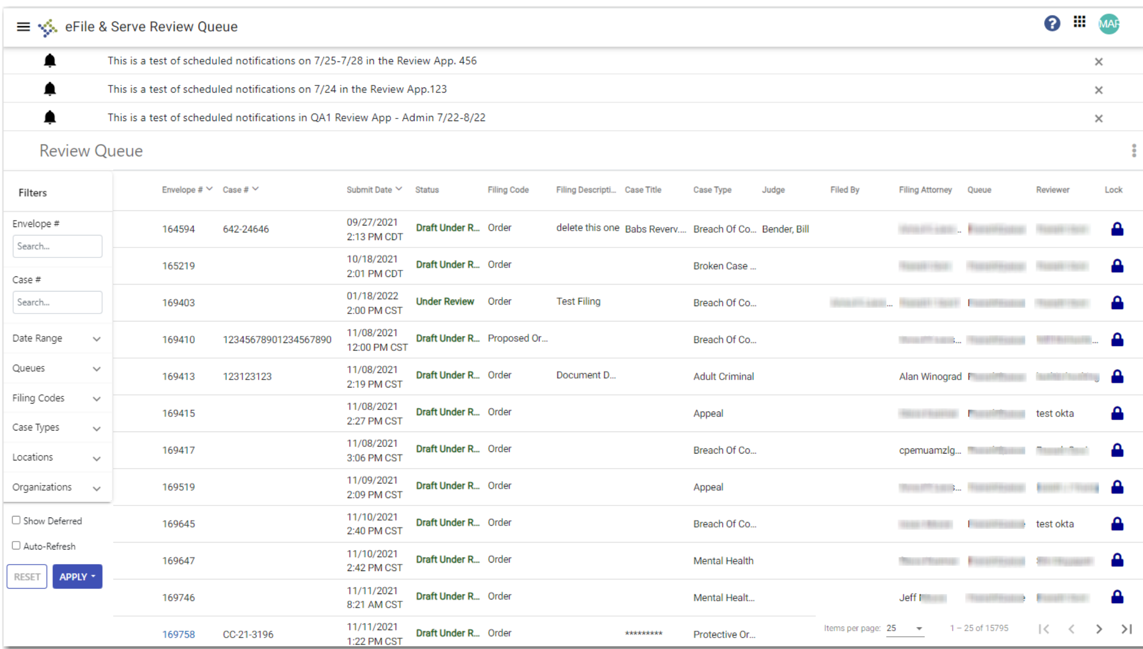


Figure 13.2 – Example of the Review Queue Page with Notifications at the Top

14 Judicial Disposition Officer

Topics covered in this chapter

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.

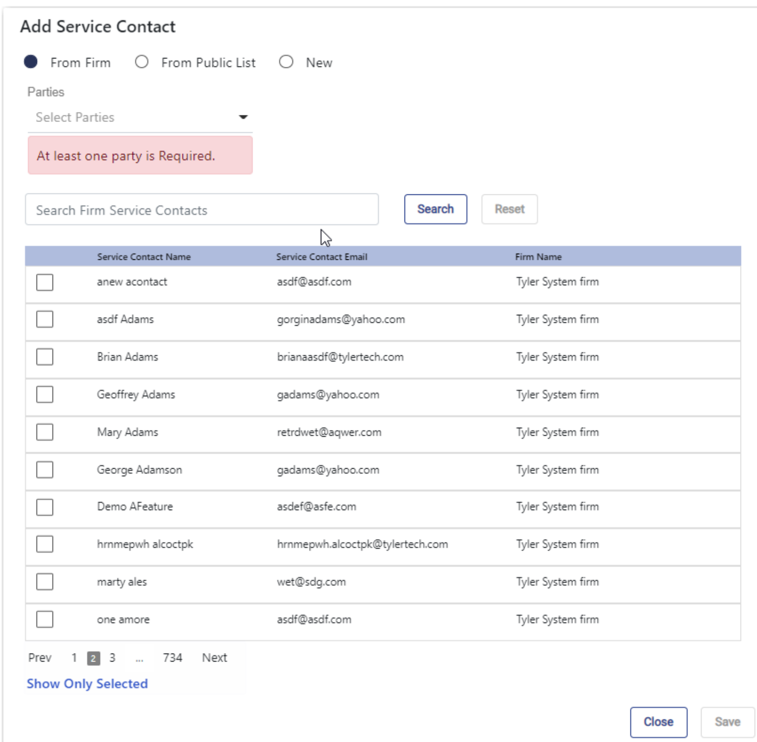


Figure 14.1 – Example of the Add Service Contact Window—From Firm Option Selected

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.

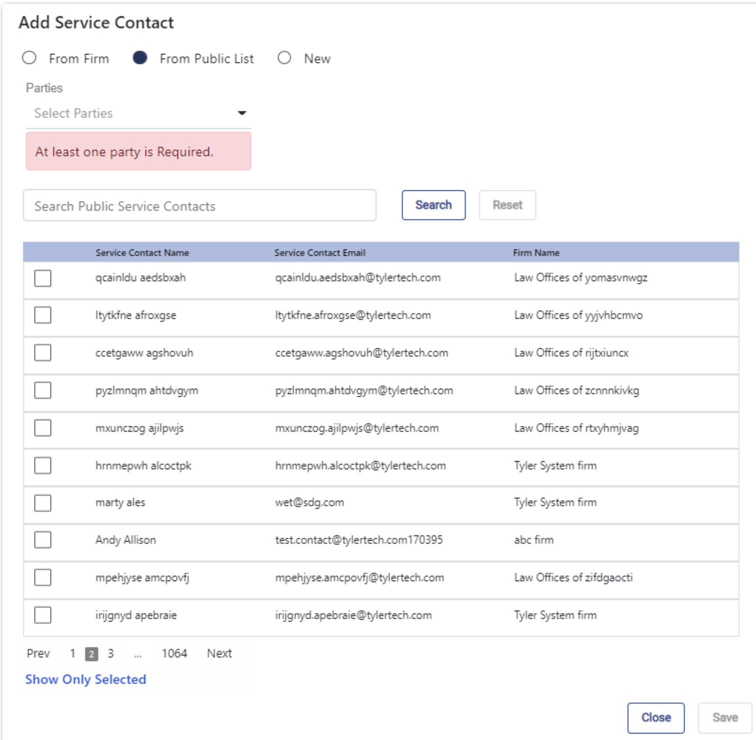


Figure 14.2 – Example of the Add Service Contact Window—From Public List Option Selected

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.

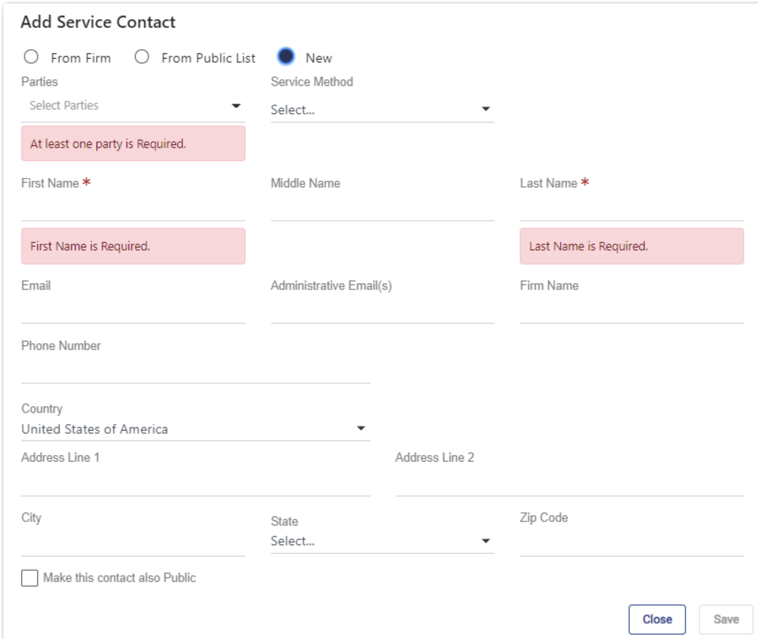


Figure 14.3 – Example of the Add Service Contact Window—New Option Selected

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 + Add Service Contact .

   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 SAVE .

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.

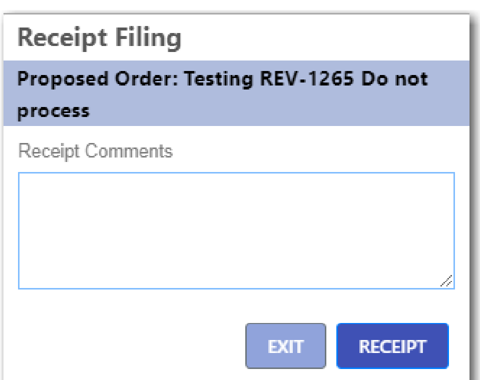


Figure 14.5 – Receipt Filing Dialog Box

2. If applicable, type any relevant comments in the **Receipt Comments** field.

3. When you are satisfied with the filing and your comments, click **RECEIPT**. Or, click **EXIT** 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.

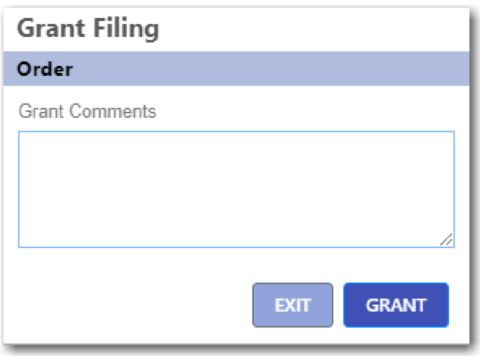


Figure 14.6 – Grant Filing Dialog Box

2. If applicable, type any relevant comments in the **Grant Comments** field.
3. When you are satisfied with the filing and your comments, click **GRANT**. Or, click **EXIT** 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.

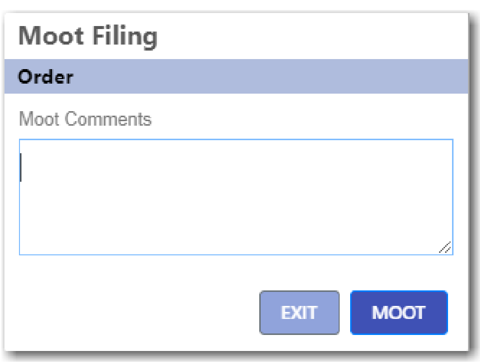


Figure 14.8 – Moot Filing Dialog Box

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.

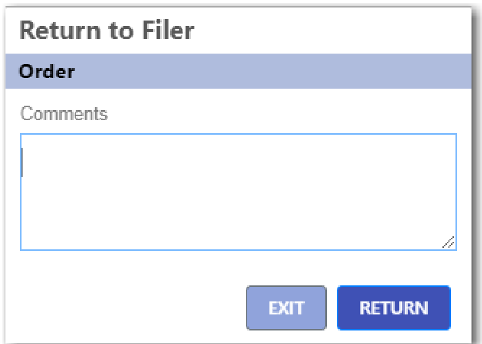


Figure 14.9 – Return to Filer Dialog Box

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.

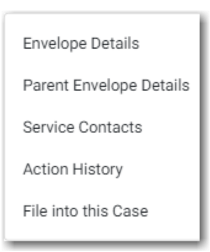


Figure 14.11 – Example of an Action Menu

The envelope details for the parent envelope are displayed.

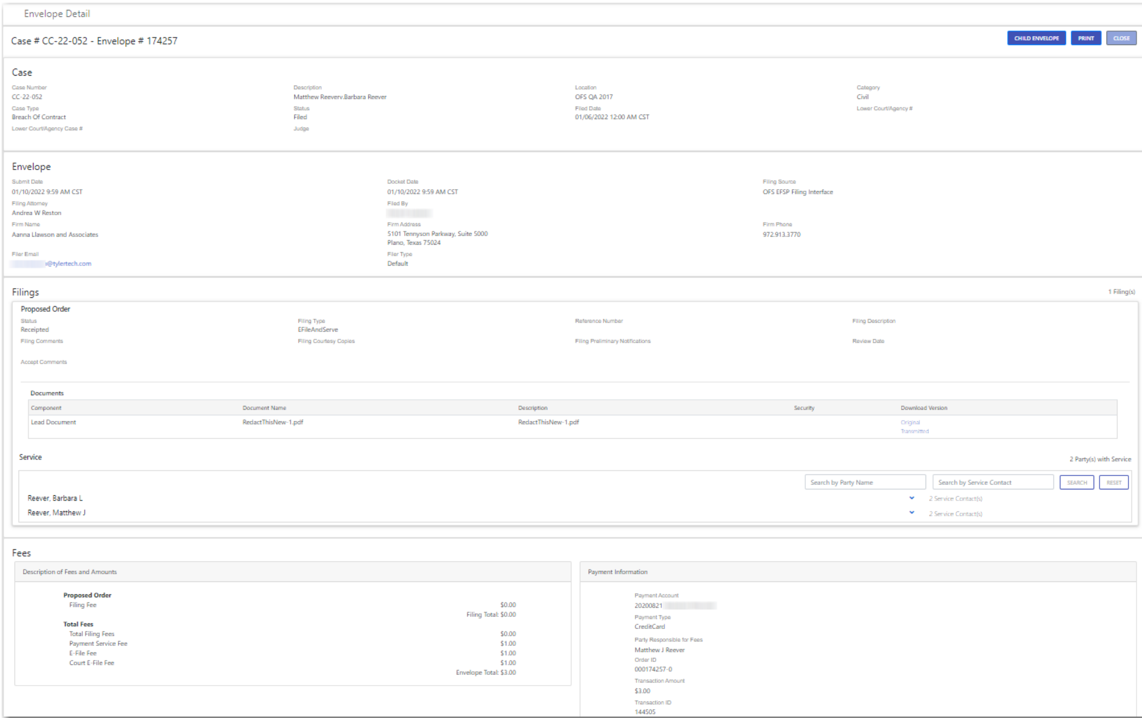


Figure 14.12 – Example of an Envelope Detail Page—Parent Envelope

3. Click 

to view the envelope details for the child envelope.

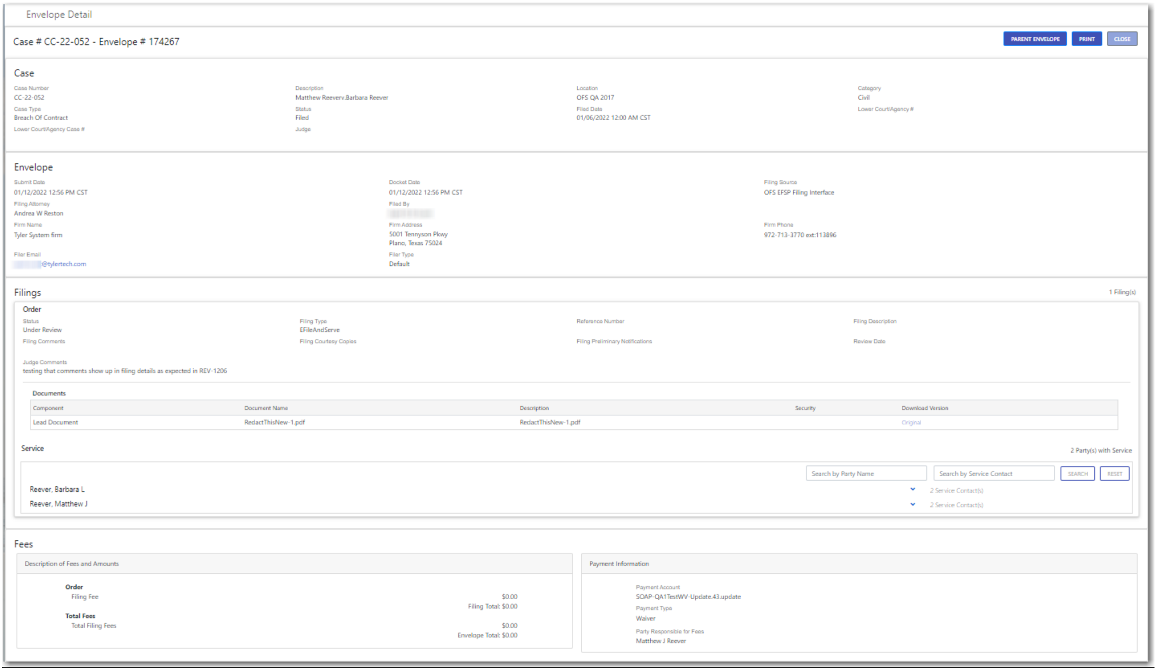


Figure 14.13 – Example of an Envelope Detail Page—Child Envelope

4. Click **PARENT ENVELOPE** to return to the envelope details for the parent envelope.
5. 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.