eFileTexas.gov™

Review Queue User Guide – Release 2017.1

Copyright and Confidentiality

Publishing History

Document Publication Number	Revision	Date	Changes Made
EFS-TF-200-4075 v.1	Initial	October 2017	Document Creation

Contents

1 Before You Begin

Topics Covered in this Chapter

This guide is intended for users with the reviewer role.

Before you begin, review this information to successfully use the software.

Note: Depending on your setup, all features may not be available. As a result, your screen may vary from what is shown in this document.

Release 2017.1 New Features

This section lists the new features for Release 2017.1.

Change to Review Tool for Maximum Fee Amounts Set by Filer

The system has been updated to prevent a reviewer from changing the filing fees if the change would cause the total filing fee to exceed the maximum amount the filer set. If a reviewer attempts such a change, the system will generate an error message.

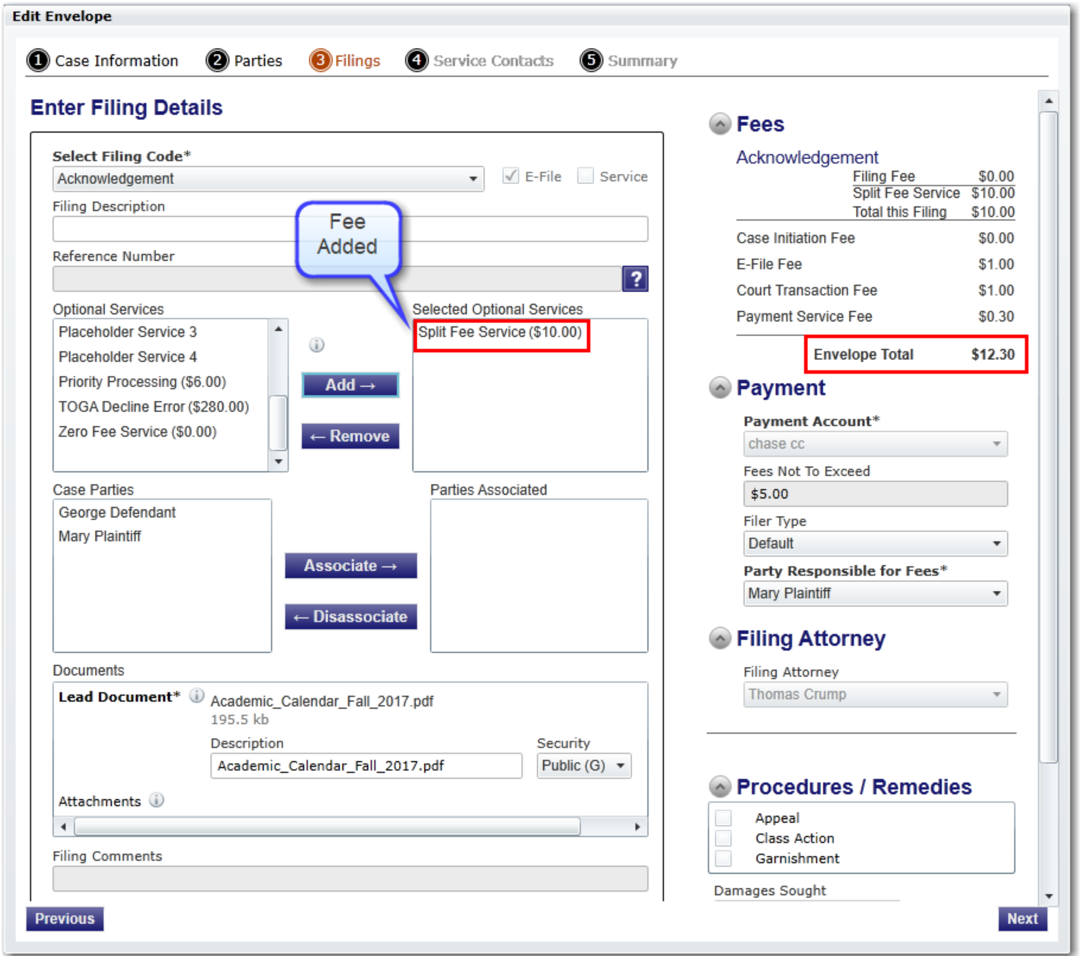


Figure 1.1 – Fee Added by Reviewer

Although the reviewer will be allowed to add fees during the review, the system displays an error message when the reviewer attempts to save the filing.

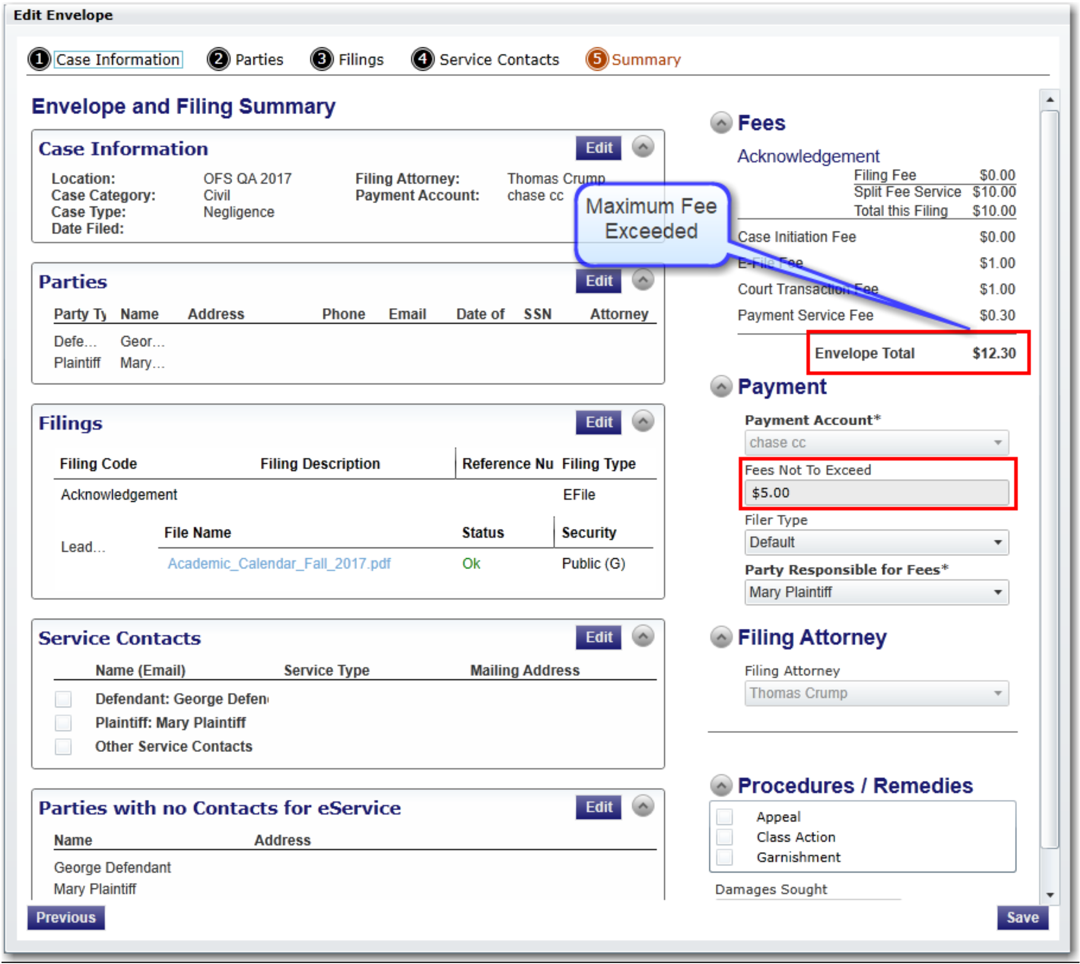


Figure 1.2 – Envelope Summary Showing the Maximum Filing Fee Exceeded

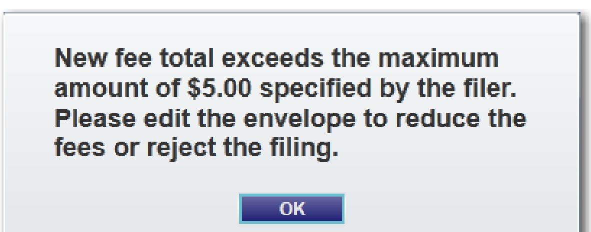


Figure 1.3 – Error Message Displayed on the Summary Page

The reviewer cannot complete the review until he or she edits the envelope and reduces the fees. If the reviewer does not reduce the fees, he or she will have to reject the filing.

System Requirements

The recommended system requirements to successfully use the system are as follows:

- **Browser Requirements** – The system supports current versions of the Microsoft® Windows® operating system using the Internet Explorer® 9 or above application program. If your browser does not meet these minimum requirements, please contact your network administrator.
- **Connection Requirements** – A high-speed Internet connection is recommended.
- **Minimum Screen Resolution** – For best results, a setting of 1024 x 768 or better is highly recommended. If necessary, users can set their monitors to 800 x 600 pixels, but doing so may compromise the graphic display.
- **Document Format** – The Adobe® PDF format is the only format allowed for attaching documents in eFileTexas.gov.

Page Navigation

The following sections describe how to navigate the system and populate data fields throughout the filing process.

Navigate with Breadcrumbs

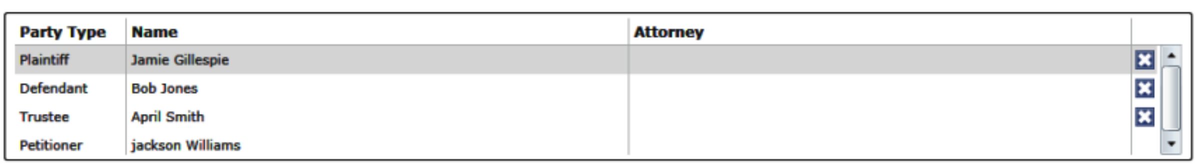
Breadcrumbs are a visual representation of the page you are currently on in the filing process. As you complete a page, the title of the next page illuminates to show where you are in the process.

Note: Breadcrumb navigation requires information to be entered in a sequential order. You cannot move to the next breadcrumb until all of the required information on the current or previous page is completed.

Figure 1.4 – Breadcrumb Navigation

Populate the Data Table

The Data Table is populated using information that filers enter or select when they complete the forms throughout the filing process.



Party Type	Name	Attorney
Plaintiff	Jamie Gillespie	
Defendant	Bob Jones	
Trustee	April Smith	
Petitioner	jackson Williams	

Figure 1.5 – Data Table

Enter User Information

The user information you enter or select populates the Data Table.

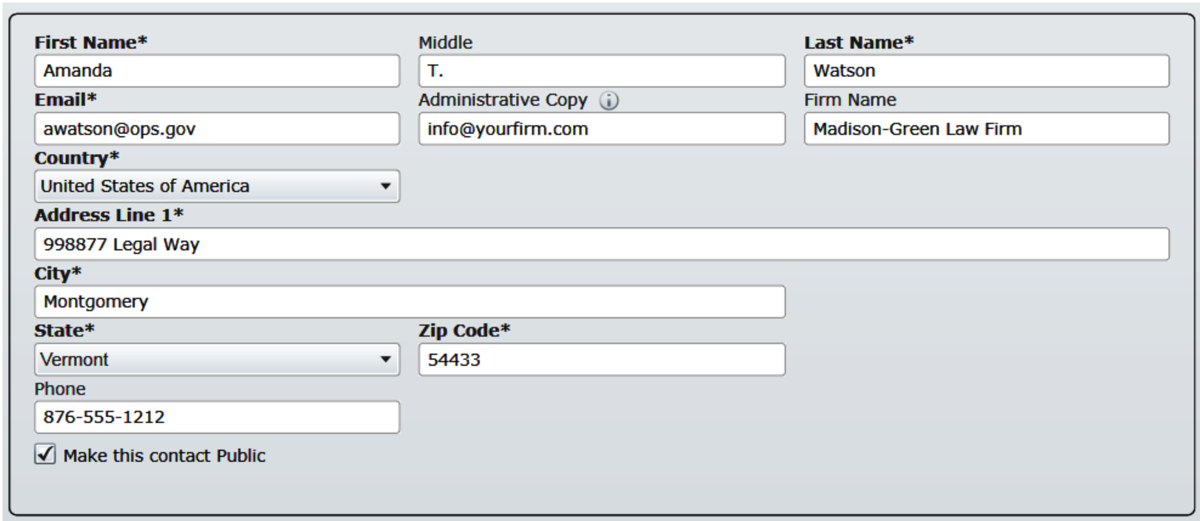


Figure 1.6 – Data Fields

Resume Filing

At any point in the filing process, the system automatically saves a draft of the page on which you have completed all required fields. This feature allows you to stop work on a filing and resume the filing at a later time. To resume filing of a saved draft, click WORKSPACE, find your case on the *Filings* page, and click ▶ to resume your filing.

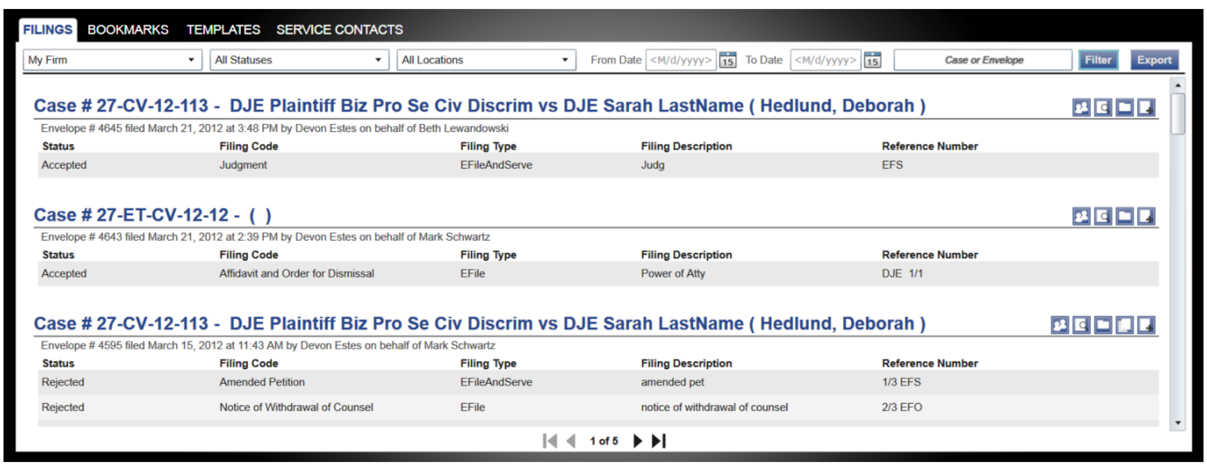


Figure 1.7 – Filings Page

Error Messages

The system displays several error messages to alert users when they have not entered required information or they provided invalid information.

Password Reset Errors Scenarios

Invalid User – To reset the password for your account, you will need to provide the user name for the account and answer the security question for the account.

Note: That user does not exist.

No Security question on File – No security question on file for (user name). Your Firm Administrator may still reset your password.

Note: Reset your password.

Enter Data in Required Fields

Required fields contain an asterisk (*) next to the field name. If you do not enter information into required fields and try to advance, you will receive error messages.

Note: Required fields may vary in different sections.

Look for a field outlined in red in your form. Place your cursor on the outline of the field. A required field message is displayed.

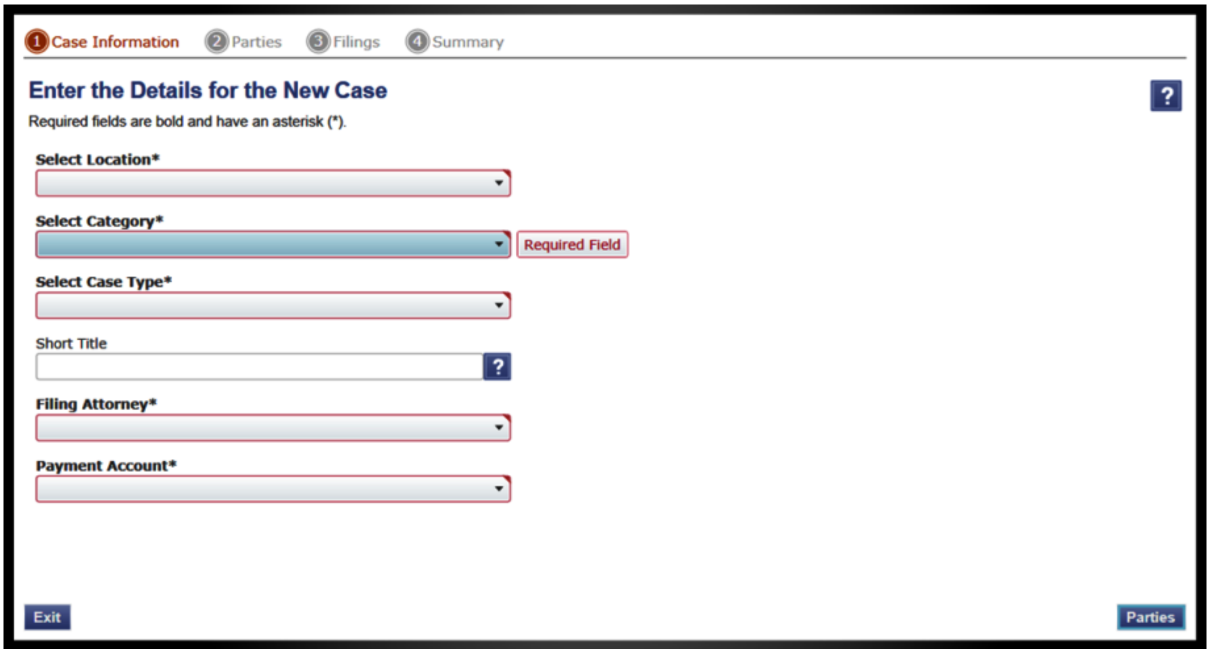


Figure 1.8 – Required Field Error Message

Receive Error Messages

When an invalid error message is displayed, you must complete the required field to continue.

If the screen does not change when you click a navigation button, look for a field outlined in red in your form. Place your cursor on the outline of the field. A required field message is displayed.

Figure 1.9 – Invalid Entry Error Message

2 E-Filing Overview

Topics Covered in this Chapter

- ♦ Review Queue Overview
- ♦ Filing Queue Status

This section describes the e-filing process.

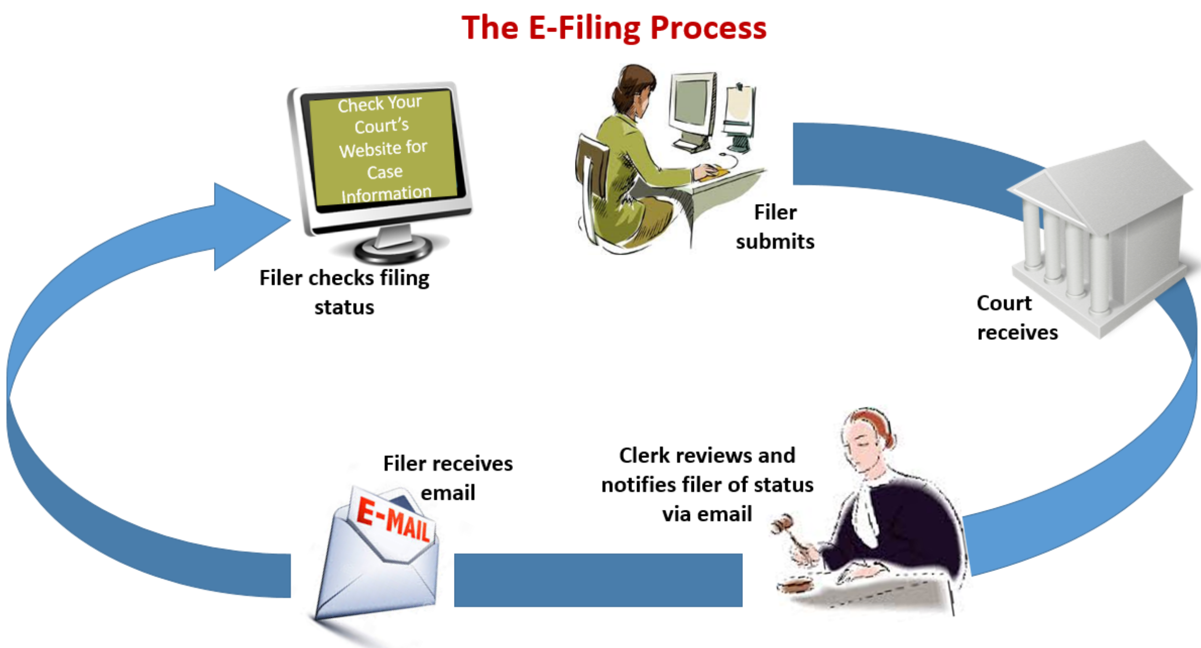


Figure 2.1 – The E-Filing Process

Once a user has registered to use eFileTexas.gov, a filer can electronically file documents to the court. When the filing is submitted, the filing is electronically delivered to the clerk's inbox. The clerk then reviews the filing and either accepts, rejects, or returns the filing.

If the clerk accepts the filing, the case is docketed and set to appear in the clerk's case management system. An email is sent to the filer with the case status along with any pertinent information regarding the case. If the option for service was selected during the filing, service is electronically sent to the contacts on the case.

If the filing is returned or rejected, the envelope is sent back to the filer with a reason for rejection, and the filer is given a time line in which to make the correction and resubmit the filing.

If the filer has questions regarding the filing or case, it is recommended that the filer contact the local court.

Review Queue Overview

The purpose of this document is to instruct the user on how to use the Review Queue.

The purpose of the Review Queue is as follows:

- To allow the user to review information associated with an e-filing.
- To process electronic filings (e-filings) and accept, reject, or forward them to another reviewer if needed.
- To annotate e-filings with text, highlights, and/or lines.

Figure 2.2 – Understanding the Review Queue Data Flow

Filing Queue Status

The filing queue status lets you know where you are in the e-filing process. The key represents the status listed for your filing.

The following filing status key table describes the status associated with each filing type.

Note: EFO – EFile Only; EFS – EfileAndServe; SO – Service Only

Status	Filing Type	Definition
Draft	EFO, EFS, SO	The filer has entered full or partial filing data, but has not yet submitted the filing.
Submitting	EFO, EFS, SO	The filer has submitted the filing, but the document file format and payment information have not been verified on the back end.
Submitted	EFO, EFS, SO	The document file format and payment information have been verified and accepted, but the filing has not yet entered the Review Queue/Workflow Process.
Court Processing	EFO, EFS, SO	Some additional action needs to be taken by the court.

Status	Filing Type	Definition
Under Review	EFO, EFS	A clerk reviewer has selected a filing from a queue. **Note: Once a filing reaches the Under Review status, it cannot return to the Submitted status. Selecting the End Review retains the Under Review status and returns the filing to the queue.**
Receipted	EFO, EFS	The filing has been acknowledged by the court as received, but it is not being transmitted to the case management system to become part of the court record. The filing may or may not be part of the proposed order work flow.
Accepted	EFO, EFS	The reviewer has reviewed the filing and accepted it.
Rejected	EFO, EFS	The reviewer has reviewed the filing and rejected it.
Returned	EFO, EFS	The reviewer has reviewed and returned the filing as additional action must be taken by the filer. **Note: The filer can cancel or copy a filing in the Returned status.**
Served	SO	Service Only filings are completed.
Service Incomplete (Service Only filings)	SO	One or more servings failed; the service was incomplete. Example: The email or domain was rejected.
Canceled	EFO, EFS, SO	The filer has canceled the filing. The filer can only cancel draft and submitted filings.
Submission Failed	EFO, EFS	A file format or billing error has occurred when the filer submitted the filing. Failure specifics are available on the *Details* page, and the filer is notified of specifics through email.

3 eFileTexas.gov Home Page

The *Home* page serves as the gateway to the system. From this page, you can register, log in, read your court's message of the day, access the user guides, view training sessions, and get contact information for Technical Support.

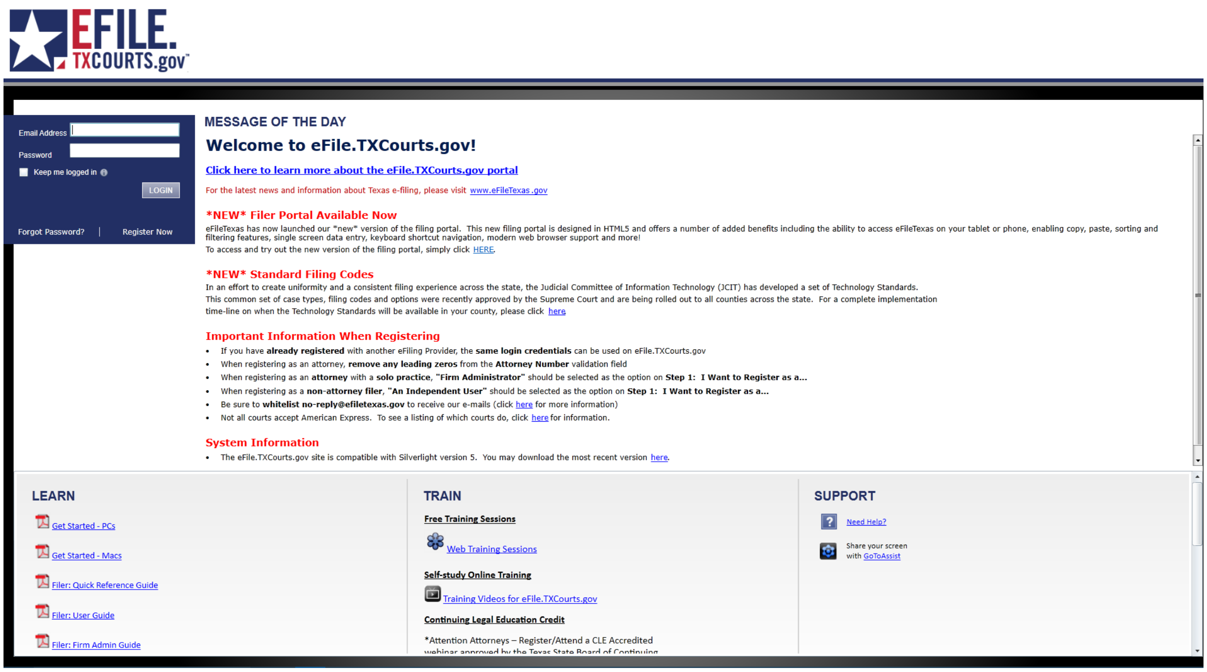


Figure 3.1 – eFileTexas.gov Home Page

Message of the Day

The **Message of the Day** section provides important messages from the court. Check this section daily for important messages from the court.

Login

The **Login** section allows you to log in and use the system. You can log in by entering your email address and password.

Register Now

The **Register Now** link allows you to register using your name, contact, and payment information. The system requires all users – whether Firm Administrators, attorneys, or individuals representing themselves – to be registered in the system.

Forgot Password

The **Forgot Password** link allows you to request that your password information be resent to you in case you have forgotten your password.

Keep Me Logged In

The **Keep me logged in** check box allows you to remain logged in to the system for future access.

Learn

The **Learn** section contains links to the user documentation. The following types of documents are available to help you answer many of your day-to-day operation questions:

- The *Individual Filer User Guide* provides step-by-step instructions on using the system. The user guide covers activities such as logging in to the system, searching for existing cases, selecting the e-file and serve options, performing an e-file and serve, and changing user settings and passwords.
- The *Firm Administrator User Guide* is specifically for the Firm Administrator. This guide covers administrative functions such as registering the firm; managing users, payments, and attorney accounts; and creating and editing the firm's contact lists.
- The *Firm and Criminal Filing Filer User Guide* is specifically for the firm users and the users with the Criminal Filing Filer role who are not Firm Administrators. This guide covers activities such as signing into the system, searching for existing cases, selecting the e-file and serve options, performing an e-file and serve, and changing user settings and passwords.
- The *Quick Reference Guide* (QRG) provides only the steps needed to complete common tasks such as logging in to the system, searching for a case, initiating a new case, filing into an existing case, and reviewing the filing status.
- The *Frequently Asked Questions* (FAQ) guide lists the most frequently asked questions from the users. The FAQ covers questions pertaining to functionality.

Train

Free regularly scheduled online training is available. You can register for training online and download user manuals.

- The **Web Conference Training Sessions** are scheduled according to the needs of the courts. Locate your specific court by scrolling through the list of training sessions for your court.
- **Self-study Online Training** is available by clicking on the link and choosing the topic of your choice.

Support

The Technical Support Team is available to assist all users. Call the Team at 855.839.3453 Monday through Friday between the hours of 7:00 a.m. and 9:00 p.m. Central Time. You can also contact a Technical Support Representative with your questions by sending an email to support@efiletexas.gov or by using the Chat option.

4 eFileTexas.gov Registration

Topics Covered in this Chapter

Registering as a User with an Existing Firm

You can register as a user if your Firm Administrator has already registered with the system and approved users to self-register.

Note: You must know your firm's name to set up your account. The Firm Administrator may not allow users to self-register. If this is the case, the firm's name is not available when you search for the name, and you must contact the Firm Administrator to be registered.

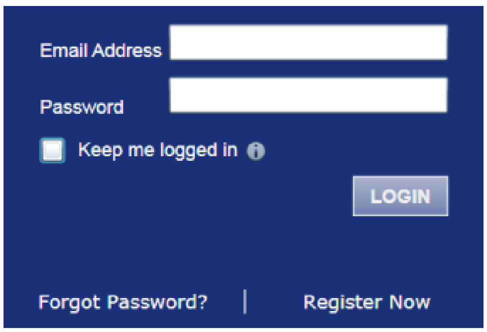


Figure 4.1 – Login Window

To register as a user in the firm, perform the following steps:

1. Click Register Now in the login section.

   The eFileTexas.gov Registration Wizard is displayed.

   Note: There is no fee to sign up for the product.

   Note: Registration options vary by site.

2. Select the User with an Existing Firm option.
3. Click Next to select your firm, or click Cancel to cancel the registration process.
4. Type your firm name in the **Firm Name** field, or click Search to view a list of all available firms. Select your firm name from the list.
5. Click Next to enter your account information, click Previous to return to the previous page, or click Cancel to cancel the registration process.

   Note: An asterisk (*) indicates required information.

6. Complete the **User Information** form.
7. Type a simple security question in the **Security Question** field. (Example: `What was your high school mascot?`)

Figure 4.2 – Security Question Field

8. Type a security answer in the **Security Answer** field.

Figure 4.3 – Security Answer Field

Note: Select the I am also an Attorney check box if you are an attorney, and then enter your attorney number in the field. Attorney number formats vary by site. Refer to your court's website for information on how to enter your attorney number.

Figure 4.4 – Attorney Number Field

Note: Click Verify if prompted. This action verifies that your attorney number is in the system.

9. Click Register.

   The system displays the **Your Registration is Complete.** message.

10. Record the login details displayed for your records.
11. Click Finish.
12. Navigate to your email inbox to access your registration confirmation email.

    Note: You must verify your email address to complete the registration process. A verification email (from No-Reply@eFileTexas.gov) will be sent to you. Open the email and click the link to confirm your email address. If you do not see the email in your inbox, check your junk mail folder for the email.

    Your registration is now complete. Once you have received your email confirmation, return to the login section to log in.

Registering as an Independent User

You can register as an "independent user" if you are a single user of the system. A single user is a user who is not associated with any firm or represented by any firm.

Note: Refer to your local court's website before registering as an independent user because the registration options may vary.

To register as an independent user, perform the following steps:

1. Click Register Now.

   Note: There is no fee to sign up for e-filing.

2. Select the An Independent User option.

3. Click **Next** to continue, click **Previous** to go back, or click **Cancel** to cancel the registration process.
4. Read the Usage Agreement before proceeding.
5. Select the ☐ I Agree check box to accept and agree to the terms listed on your page.
6. Click **Next** to continue, click **Previous** to go back, or click **Cancel** to cancel the registration process.
7. Complete the **Contact Information** form.
8. Click **Next** to continue, click **Previous** to go back, or click **Cancel** to cancel the registration process.
9. Complete the **User Information** form.
10. Type a question in the **Security Question** field.

    Note: Your security question is required to restore your password in case you forget your password.

11. Type a response in the **Security Answer** field.
12. Click **Register**.

    The message `Your Registration is Complete` is displayed.

13. Click **Finish**.

    Note: You must verify your email address to complete the registration process. A verification email (from No-Reply@eFileTexas.gov) will be sent to you. Open the email, and click the link to confirm your email address. If you do not see the email in your inbox, check your junk mail folder for the email.

    Your registration is complete. Access your *Home* page to log in.

5 Login and Logout

Topics Covered in this Chapter

♦ Logging In
♦ Logging Out
♦ Resetting Your Password

All users are required to log in to e-file and serve a document or to check the status of an existing filing. It is also a best practice for users to log out after they have completed their transactions.

Logging In

You can log in by using your email address and password provided during the registration process. You must log in to be able to e-file or e-serve.

Note: Click Register Now to register if you have not registered before.

To log in, perform the following steps:

1. Access your *Home* page.
2. Type your email address and password (case-sensitive) in the fields provided.

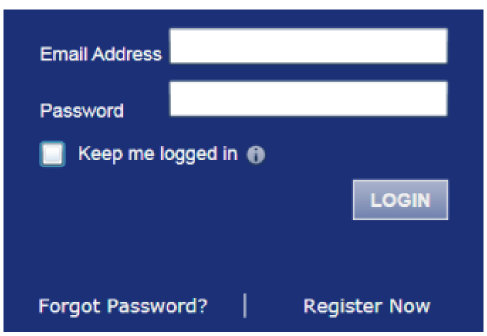


Figure 5.1 – Login Window

3. Select the Keep me logged in check box to stay logged in.

   This action keeps you logged in until you click the logout link to log out.

4. Click LOGIN.

   Note: After several failed attempts to log in to the system, your account is locked. You can unlock your account by using the Forgot Password? option if a security question is associated with the account.

   Once you have successfully logged in, you can begin to e-file and e-serve.

Logging Out

This section describes how to properly log out.

To log out, perform the following steps:

1. Click LOGOUT to automatically log out.

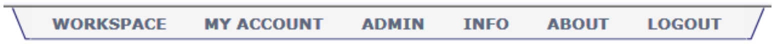


Figure 5.2 – Logout Link

2. Return to the *Home* page to log in to the system.

Resetting Your Password

If you have forgotten your password, you can reset your password by entering the email address provided during registration and then clicking Forgot Password?.

Note: Your password is case-sensitive. Ensure that the caps lock setting is not on.

Note: You can unlock your account by using the Forgot Password? option and resetting your password if a security question is associated with the account.

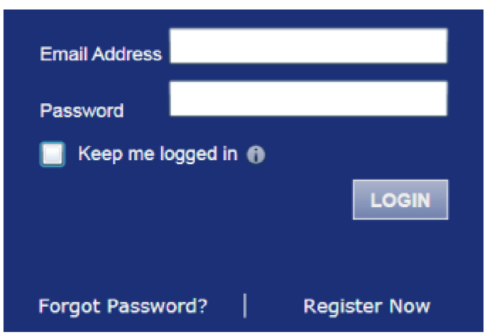


Figure 5.3 – Login Window

To reset your password, perform the following steps:

1. Click Forgot Password? on the *Login* window.

   The *Reset Password* window is displayed.

Figure 5.4 – Reset Password – Email Address

2. Type the email address you provided during the registration process in the **Email Address** field.

   Note: An error message stating that no user is registered with the email address is displayed if the system is unable to find your email address.

3. Click **Next** to continue.
4. Type your answer in the **Security Answer** field.
5. Click **Ok**, or click **Cancel** to cancel the reset password process.

   The system displays this message: `A password reset link has been sent to the email address associated with your account. If you do not see the password reset email in your Inbox, please check to see if it was delivered to your spam folder.`
6. Access your email inbox.
7. Locate the email from No-Reply@eFileTexas.gov.
8. Click the link labeled **Click here** to reset your password.

   You are prompted to choose a new password.
9. Type a new password in the **New Password** field.
10. Retype your new password in the **Repeat New Password** field.
11. Click **Change Password**.

    A confirmation screen displays this message: `Your password has been changed successfully.`

6 My Account

Topics Covered in this Chapter

Click **My Account** to access the *Change Password*, *Manage Notifications*, and *Reviewer Preferences* pages.

You can change your password and your security question on the *Change Password* page.

You can manage the email notifications that you want to receive on the *Manage Notifications* page.

You can manage your queue preferences on the *Reviewer Preferences* page.

Changing the User Password

You can change your password on the *Change Password* page.

Figure 6.1 – Change Password Page

Note: Your password is case-sensitive and must be at least six characters in length.

To change the user password, perform the following steps:

1. Click MY ACCOUNT.

   The *Change Password* page is displayed.
2. Complete the required fields.

   Note: You can unlock your account by using the Forgot Password? option.

3. Click Save to change your password, or click Cancel to exit without changing your password.

Changing the Security Question

You can change your security question on the *Change Password* page.

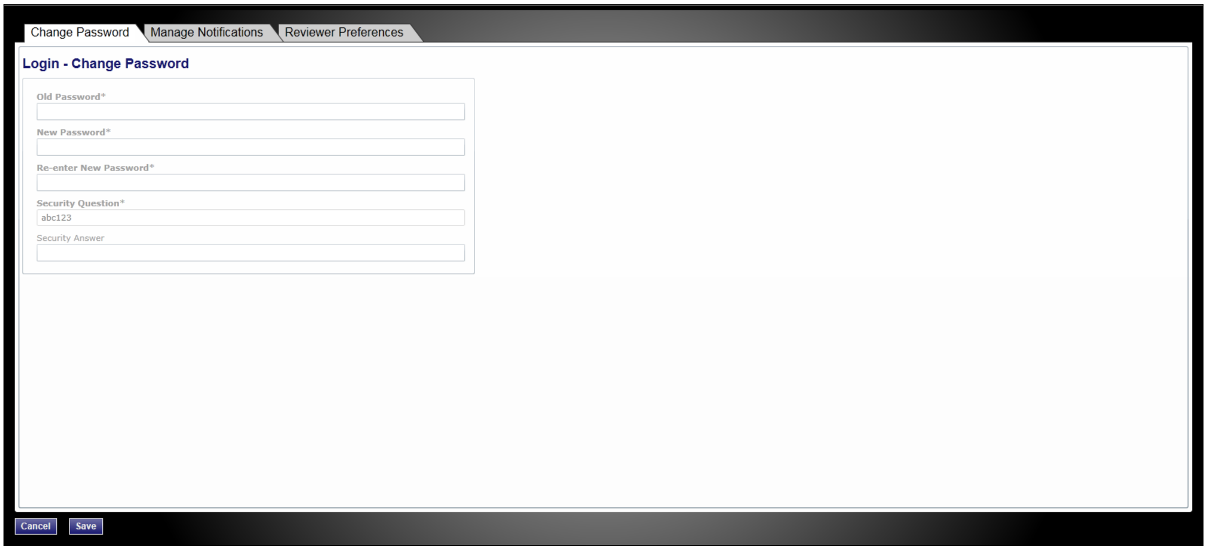


Figure 6.2 – Security Question Field on the Change Password Page

To change the security question, perform the following steps:

1. Click MY ACCOUNT.

   The *Change Password* page is displayed.
2. Change your security question and answer by typing your new information in the **Security Question** and **Security Answer** fields.
3. Click Save to change your security question, or click Cancel to cancel the action.

Managing Email Notifications

You can manage the email notifications that you want to receive from the system.

Figure 6.3 – Manage Notifications Page

To manage your email notifications, perform the following steps:

1. Click MY ACCOUNT.

   The *Change Password* page is displayed.
2. Click **Manage Notifications**.

   The *Manage Notifications* page is displayed.
3. Select the check boxes for the notifications that you want to receive, or clear the check boxes for the notifications that you do not want to receive.
4. Click Save to save your selection, or click Cancel to cancel the action.

Managing Reviewer Preferences

Reviewers can specify their queue preferences. In addition, they can advance to the next envelope or exit the envelope and return to the Review Queue when they are done working with the envelope.

You must have Reviewer privileges to access the Review Queue.

To access the Review Queue and specify your queue preference, perform the following steps:

1. Click MY ACCOUNT.

   The *Change Password* page is displayed.
2. Click **Reviewer Preferences**.

   The *Reviewer Preferences* page is displayed.

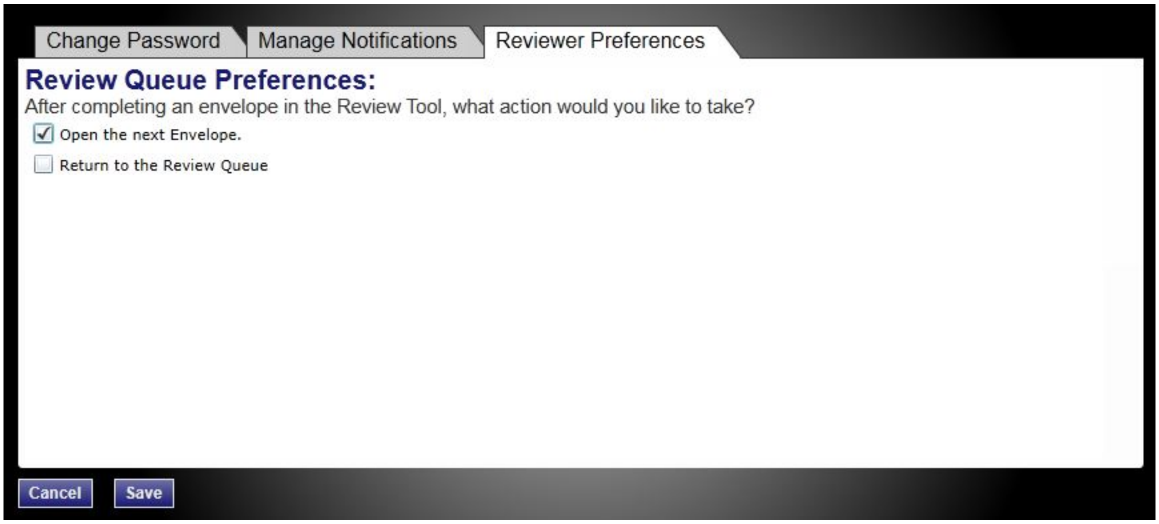


Figure 6.4 – Reviewer Preferences Page

3. Select the check box of your preference.
4. Click **Save** to save your preferences, or click **Cancel** to exit without changing your preferences.

7 Case Search

Topics Covered in this Chapter

♦ Advanced Search

You can search for a case by selecting a location and entering a case number or a party name.

Advanced Search

The Advanced Search feature provides the ability to search by party name using a person's name or a business name. The Advanced Search feature includes the ability to filter a search by party name based on the location or the case type.

Performing an Advanced Search by Person

Search for a case by selecting a location and entering a case number or a party name. The Advanced Search feature provides the ability to search by party name using a person's name.

Note: An asterisk (*) indicates a required field.

Note: Color themes can vary by site.

To run an Advanced Search using the **Person** option, perform the following steps:

1. Click **Advanced Search** in the **New Case** section.

   The *Advanced Search* dialog box opens.

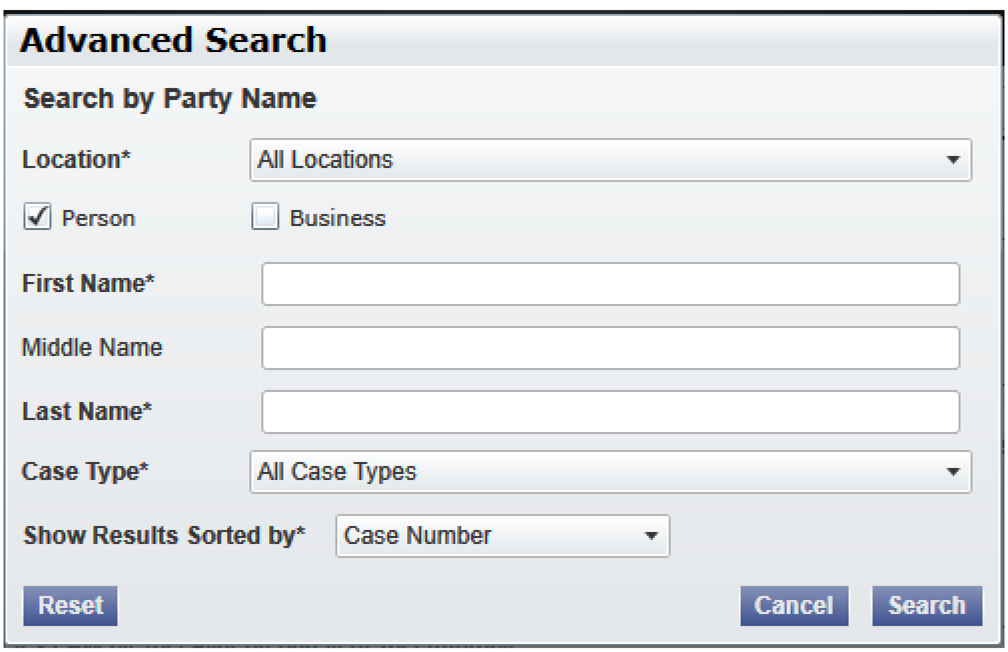


Figure 7.1 – Advanced Search Dialog Box

2. Select the **Person** check box.

Note: Check boxes are configurable. This option may vary by site. For example, some clients may only have businesses listed in the case management system, so a check box is not required.

3. Complete the fields in the *Advanced Search* dialog box.
4. Click **Search** to continue, or click **Cancel** to cancel. Click **Reset** to reset the form.

The search results are displayed.

Performing an Advanced Search by Business

The Advanced Search feature provides the ability to search by party name using a business name.

Note: An asterisk (*) indicates a required field.

Note: Color themes can vary by site.

To run an Advanced Search using the **Business** option, perform the following steps:

1. Click **Advanced Search** in the **New Case** section.

   The *Advanced Search* dialog box opens.

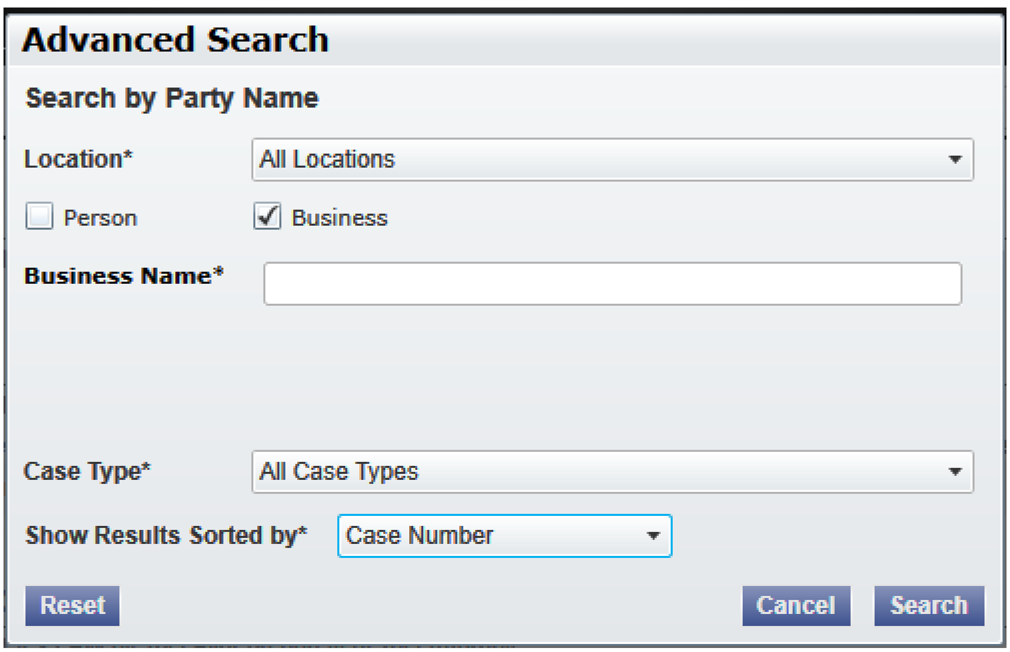


Figure 7.2 – Advanced Search Dialog Box

2. Select the **Business** check box.

   Note: Check boxes are configurable. This option may vary by site. For example, some clients may only have businesses listed in the case management system, so a check box is not required.

3. Complete the fields in the *Advanced Search* dialog box.
4. Click **Search** to continue, or click **Cancel** to cancel. Click **Reset** to reset the form.

The search results are displayed.

8 Accessing the Review Queue

Topics Covered in this Chapter

♦ Filtering the Review Queue
♦ Saving Default Filters

The Review Queue allows reviewers to work cases.

You must have Reviewer privileges to access the Review Queue.

To access the Review Queue, perform the following steps:

1. Click WORKSPACE on the workspace toolbar.

Figure 8.1 – Workspace Toolbar

2. Click REVIEW QUEUE.

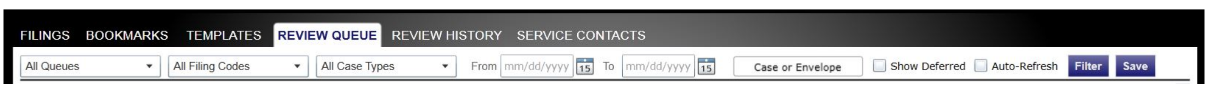


Figure 8.2 – Review Queue Page Filter Options

Note: You can filter the case in the queue by using specific parameters.

Note: Pause on the case status for tooltips regarding the case.

The *Review Queue* page is displayed.

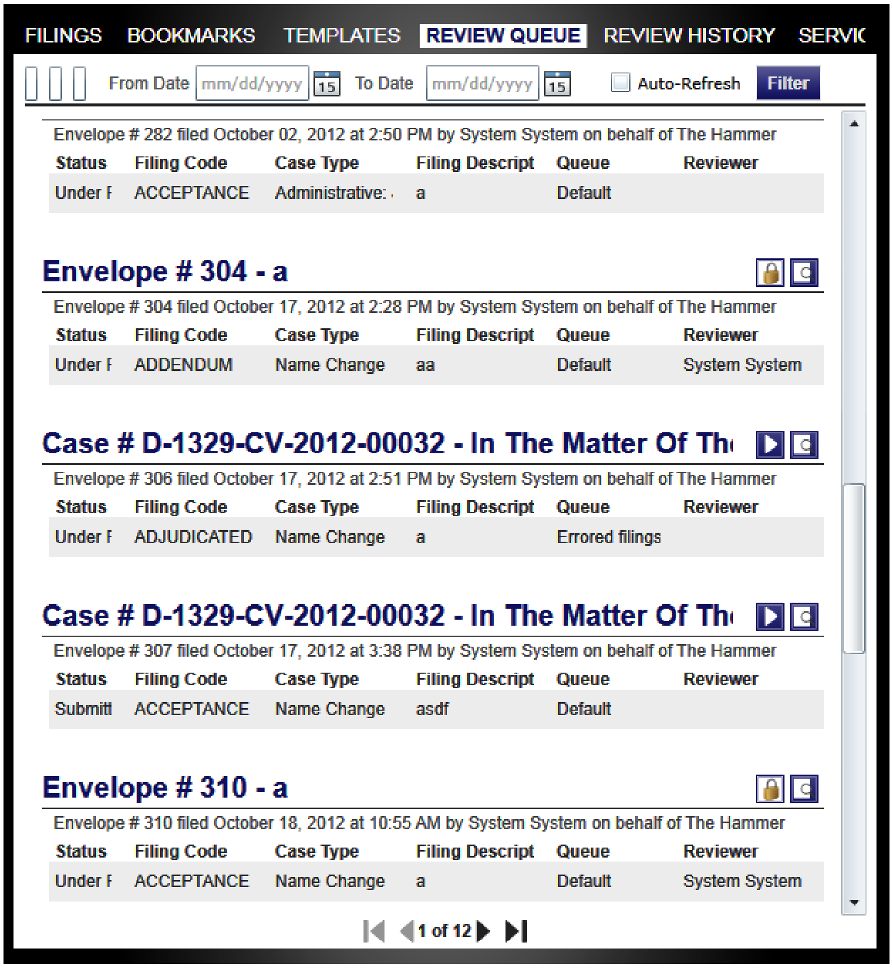


Figure 8.3 – Review Queue Page

3. Click to access the case that you want to retrieve for review.

Note: If you try to exit the envelope (by clicking Workspace or another link in the top menu) before the envelope completes loading, the system displays a message to wait until the previous work item has finished loading.

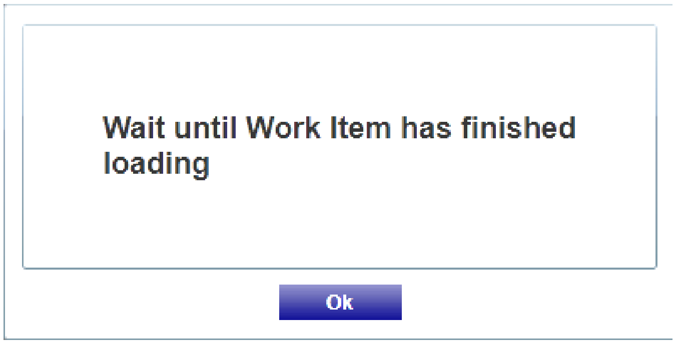


Figure 8.4 – Work Item Notification

The Locked by User ( ) icon is displayed on an envelope when another reviewer is reviewing the envelope or currently has the envelope open.

Note: The Court Administrator can remove the lock if needed. A message is displayed when you refresh your screen, indicating that a lock has been removed.

Filtering the Review Queue

Use the Review Queue filter to view only those filings that you require.

Note: Only you and your court can see this information.

To filter the Review Queue, perform the following steps:

1. Select the filter parameters from the drop-down lists, or enter specific information in the search fields.

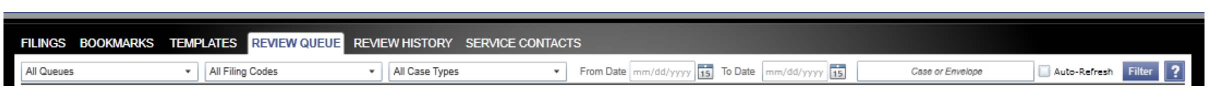


Figure 8.5 – Filter Option on the Review Queue Page

Note: For the From Date or the To Date, click to select dates from a calendar; or type the dates manually (for example, type `1/31/2017`).

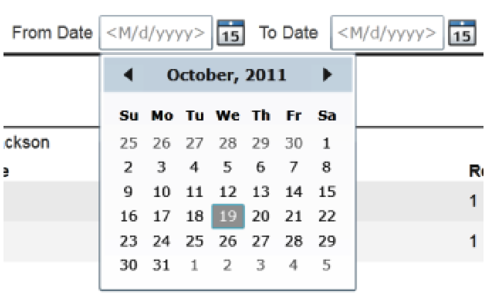


Figure 8.6 – Select the Dates Using the Calendar

2. Click **Filter** to filter the search.

Note: To clear the filter, click Review Queue on the toolbar.

A list of cases meeting your search criteria is displayed.

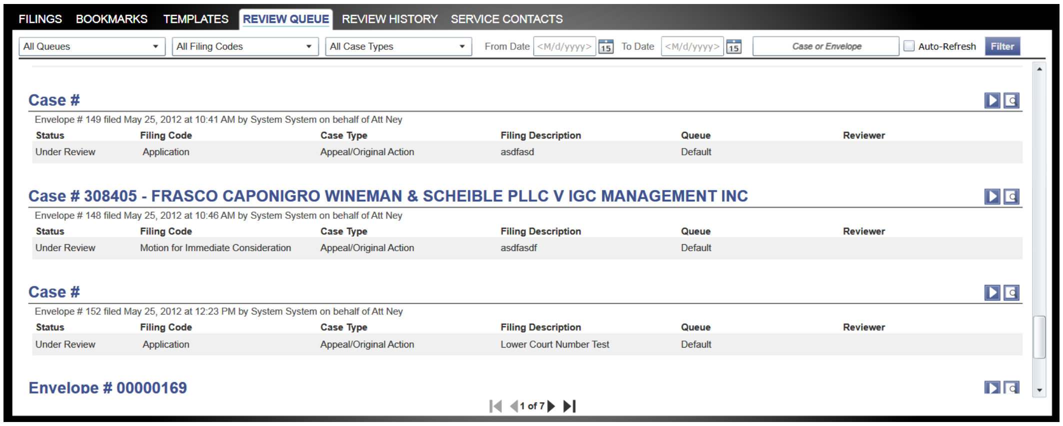


Figure 8.7 – Review Queue Page

3. Click  to access the case that you want to retrieve for review.

Saving Default Filters

The default filter allows the reviewer to save a filter commonly used when searching for cases. To save a default filter, perform the following steps:

1. Click **Review Queue**.
2. Select the filters from the drop-down lists at the top of the page.
3. Click **Save** to save the filters.

Note: The filters will be saved until you log in using a different ID.

You can clear the default filter by clicking **Clear**. To reset a filter, clear the filter, then click **Save**.

9 Work in the Review Queue

When you select a filing to review, the *User Interface* page is displayed.

Review Queue Overview

This section describes the **Envelope**, **Filing Information**, and **Service Contacts** sections; the document display window; the annotation tools; the review action buttons; the paging arrows; and the fit-to-window arrows.

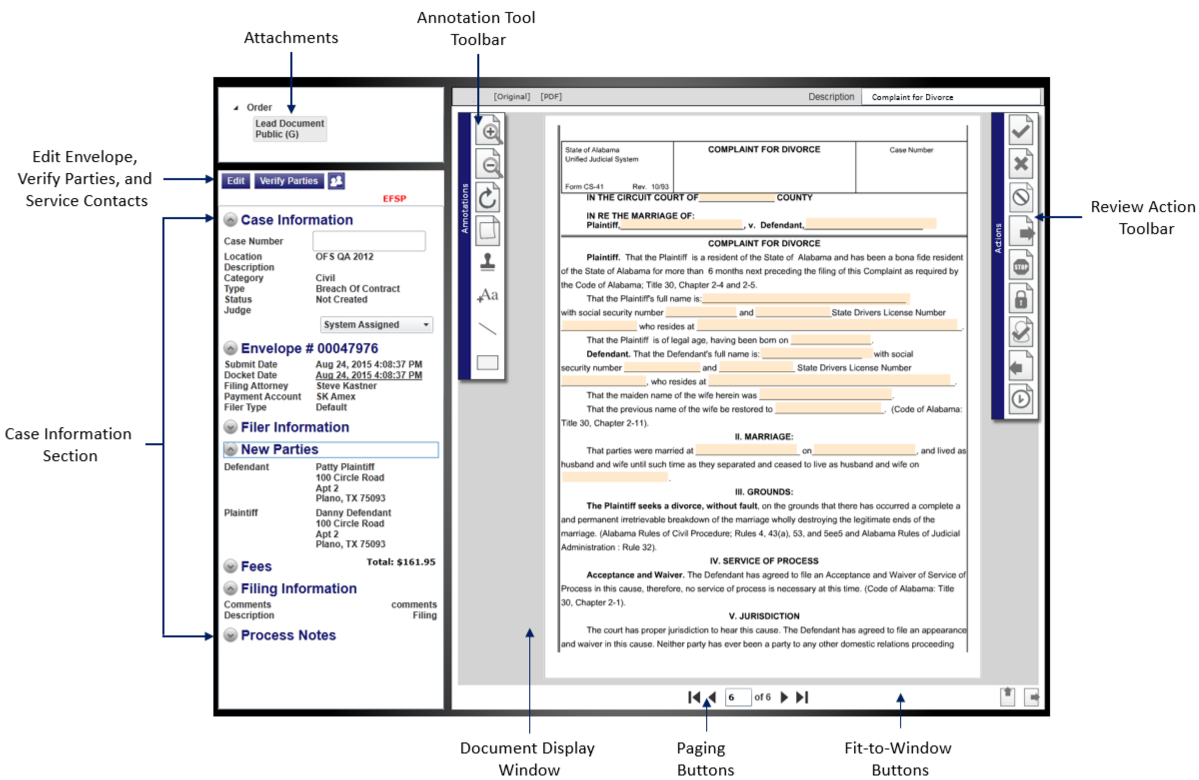


Figure 9.1 – Review Queue User Interface

Attachments

The **Attachments** section displays any documents attached to the envelope.

Envelope, Filing Information and Service Contacts Sections

The **Envelope**, **Filing Information**, and **Service Contacts** sections display the case information, the envelope information, the service contacts, the parties involved in the case, the fees associated with the filing, and any filer comments.

Document Display Window

The *Document Display* window displays the currently selected filing document. This window contains the **Annotation Tools** toolbar, the **Review Actions** toolbar, the paging arrows, and the fit-to-window arrows.

Annotation Tools Toolbar

The default location for the **Annotation Tools** toolbar is on the upper left edge of the *Document Display* window. The toolbar provides tools to zoom in or out of the document; and to add text annotations, lines, highlights, and image stamps. Pause on a button to display a tooltip that describes the button's function. You can move the **Annotation Tools** toolbar and the **Review Actions** toolbar anywhere within the *Document Display* window.

Review Actions Toolbar

The default location for the **Review Actions** toolbar is on the upper-right edge of the *Document Display* window. The toolbar provides tools to accept, reject, or forward the filing; end the review; change the document security; manually accept the filing; or send the filing back to the filer. Pause on a button to display a tooltip that describes the button's function.

Note: Toolbar options vary by site.

Paging Arrows

The paging arrows allow you to access different pages in the document.

Note: You must use the paging arrows to navigate to a specific page. The review actions that are available vary depending on the client site.

Fit-to-Window Arrows

The fit-to-window arrows allow you to modify the document display.

10 Review Envelope and Filing Information

Topics Covered in this Chapter

The **Envelope** and **Filing Information** sections display case and envelope information, filer information, parties involved in the case, fees associated with the case, and filer's comments.

Click to collapse the information, or click to expand the information.

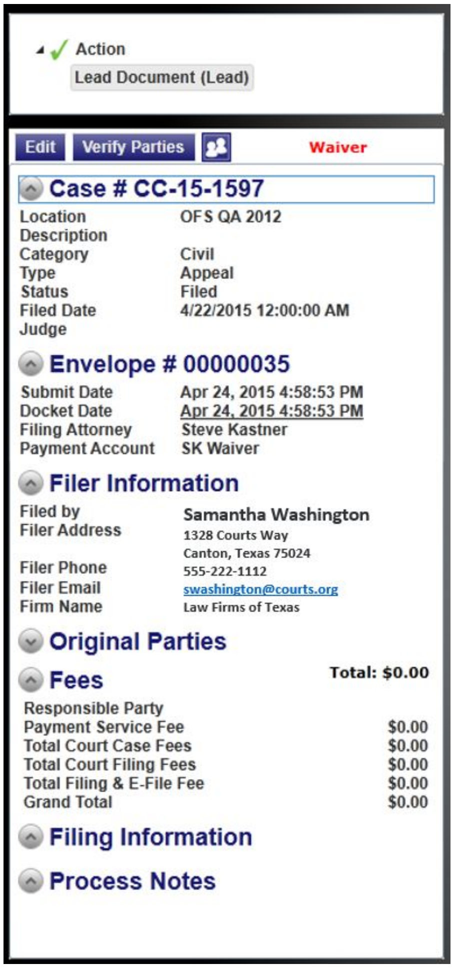


Figure 10.1 – Envelope and Filing Information Section

Attachments Section

The **Attachments** section displays the lead documents and all other attachments for the case.

There may be one or more documents listed in the **Attachments** section.

Figure 10.2 – Attachments Section

The system displays a notification when a document is submitted in an unsupported file type.

Note: Unsupported document types are not transmitted to the Case Management System (CMS).

Microsoft® Word® files are not a supported file type, but a filer can upload Microsoft Word files as an attachment if the county accepts this document format type.

Note: The PDF format is the recommended file upload format.

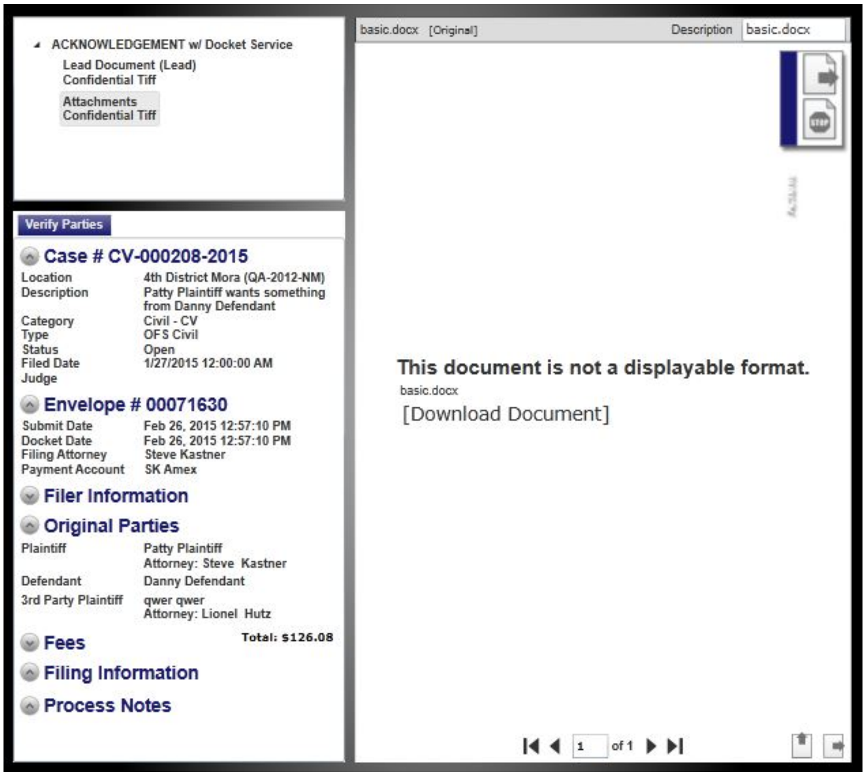


Figure 10.3 – Unsupported Document Type Notification

Determine which document you want to work with, and click the link on the document to view the document in the *Document Display* window.

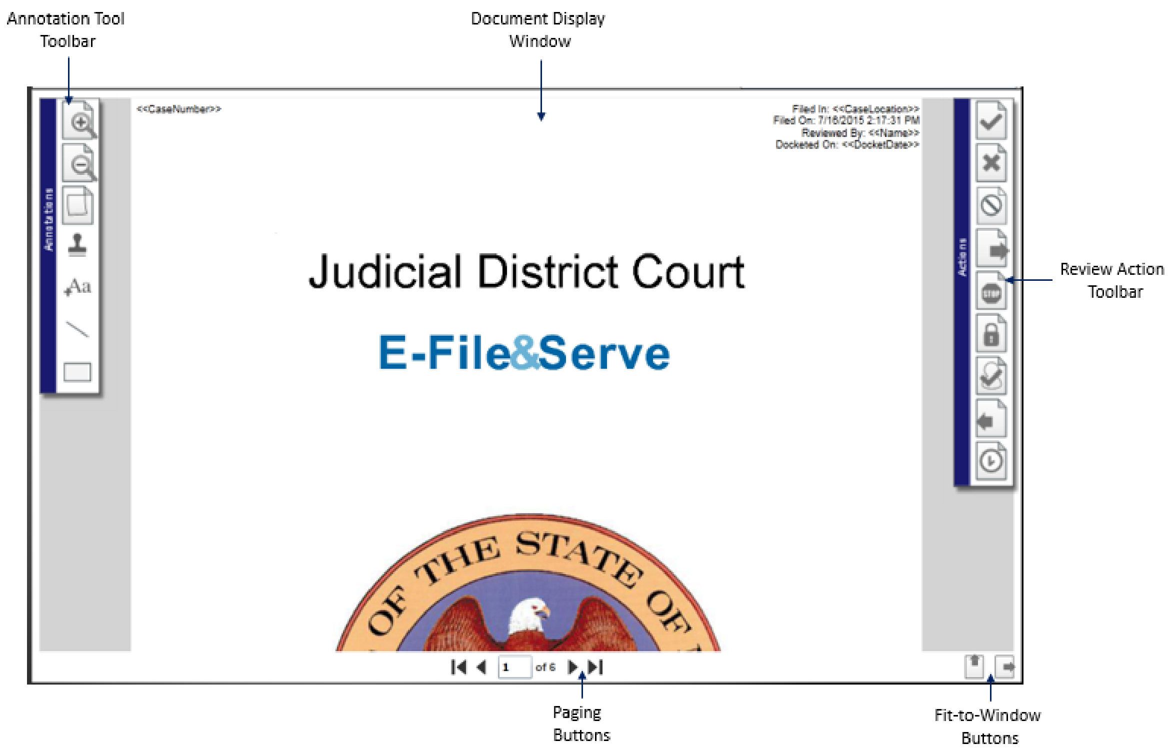


Figure 10.4 – Document Display Window

Edit Envelope Information

For new cases, you can edit envelope information by clicking , located above the **Case Information** section.

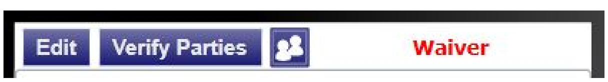


Figure 10.5 – Edit and Verify Parties Toolbar

On subsequent filings, you can edit the party information by clicking . This action opens the *Edit Envelope* window and allows you to edit the information as needed. You can also remove an attorney from the case by clicking . If you are reviewing a new case filing, review the submitted party information to confirm that it is accurate before accepting the new case filing.

You can correct or extend the filing information based on the court procedures associated with e-filing or from information obtained within the documents submitted by the filer. For example, you can add an additional party referenced in the document to the filing, or you can correct the spelling of a party name to match the spelling in the submitted document.

You can also correct any of the filing domain items, such as the case type or filing code.

Adding New Case Party Attorneys

Reviewers now have the option to add a new case party attorney to the case.

To add a new case party attorney to a filing, perform the following steps:

1. Log in as a reviewer.

   Note: You must have reviewer privileges to access the Review Queue.

   The Review Queue opens.
2. Locate the filing that you want to review.
3. Click  to review the filing.

   The **Work Items** queue opens.
4. Click Edit to access the *Case Information* page.
5. Click **Next** to access the *Edit Envelope* page.

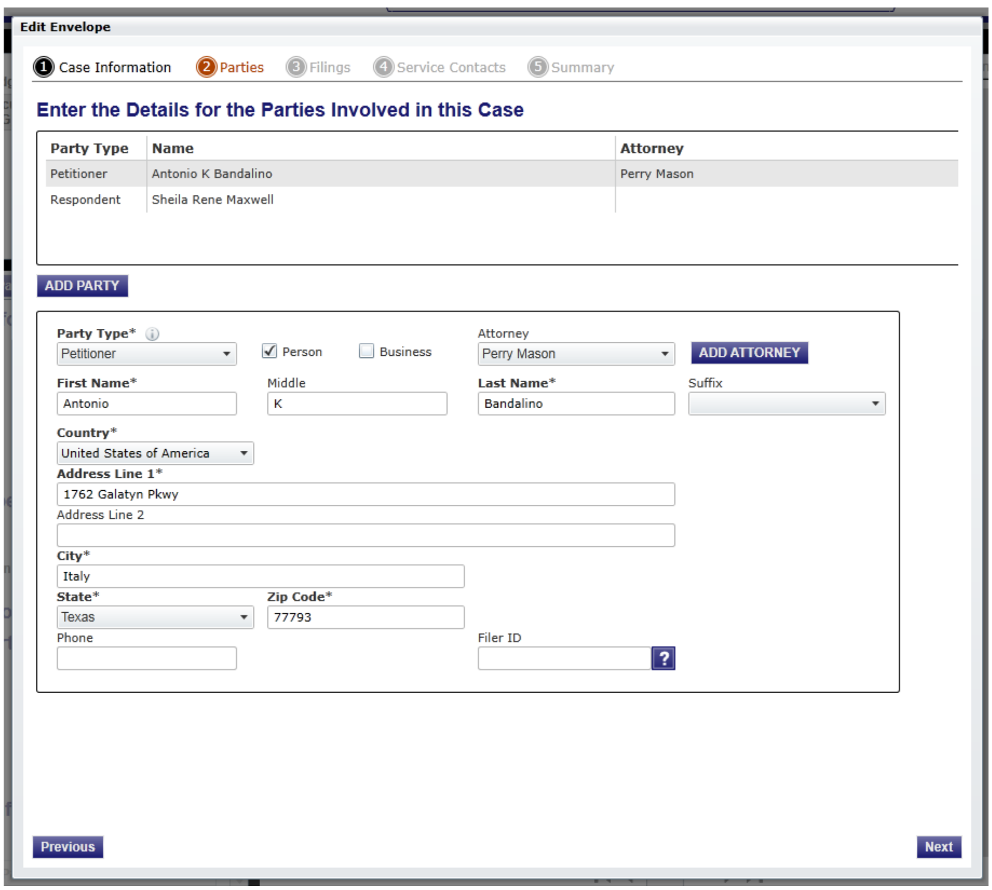


Figure 10.6 – Edit Envelope Page

6. Click **ADD ATTORNEY** to add a new case party attorney to the filing.

   The *Add An Attorney* dialog box opens.

   Note: An asterisk (*) indicates a required field.

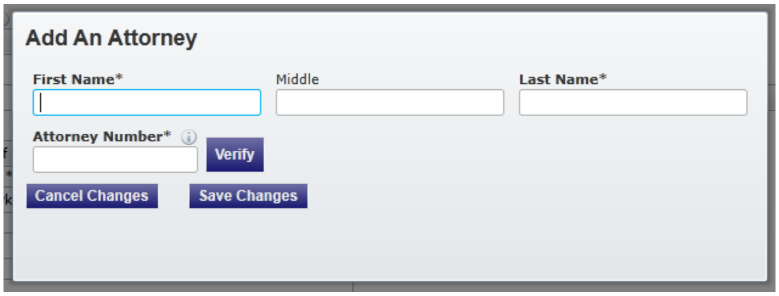


Figure 10.7 – Add An Attorney Dialog Box

7. Enter the attorney's first and last name in the fields provided.
8. Enter the attorney number in the **Attorney Number** field.

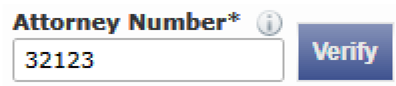


Figure 10.8 – Attorney Number Field

9. Click Verify to verify that the attorney number is correct and registered with the court.

   The *Verify Attorney Information* window opens and loads the attorney information that is registered with the court.

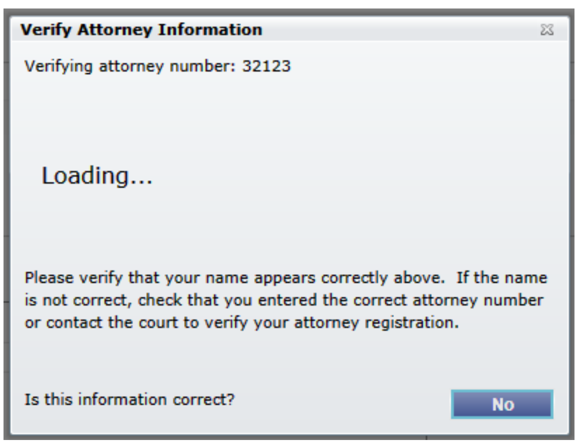


Figure 10.9 – Verify Attorney Information Window

Note: If the attorney information is incorrect, click No to correct the information. This action takes you back to the Attorney tab.

10. Assign the attorney roles.
11. Type the attorney's email address.

Figure 10.10 – Email Address Field

12. Click **Save Changes** to save the changes and continue, or click **Cancel Changes** to cancel any changes that you made.

Total Amount Mismatch Error

A reviewer can edit the filing code or the associated fee during the review process.

The *Total Amount Mismatch* error message is displayed when a reviewer edits the filing codes or fees after the system has captured the funds for the filings.

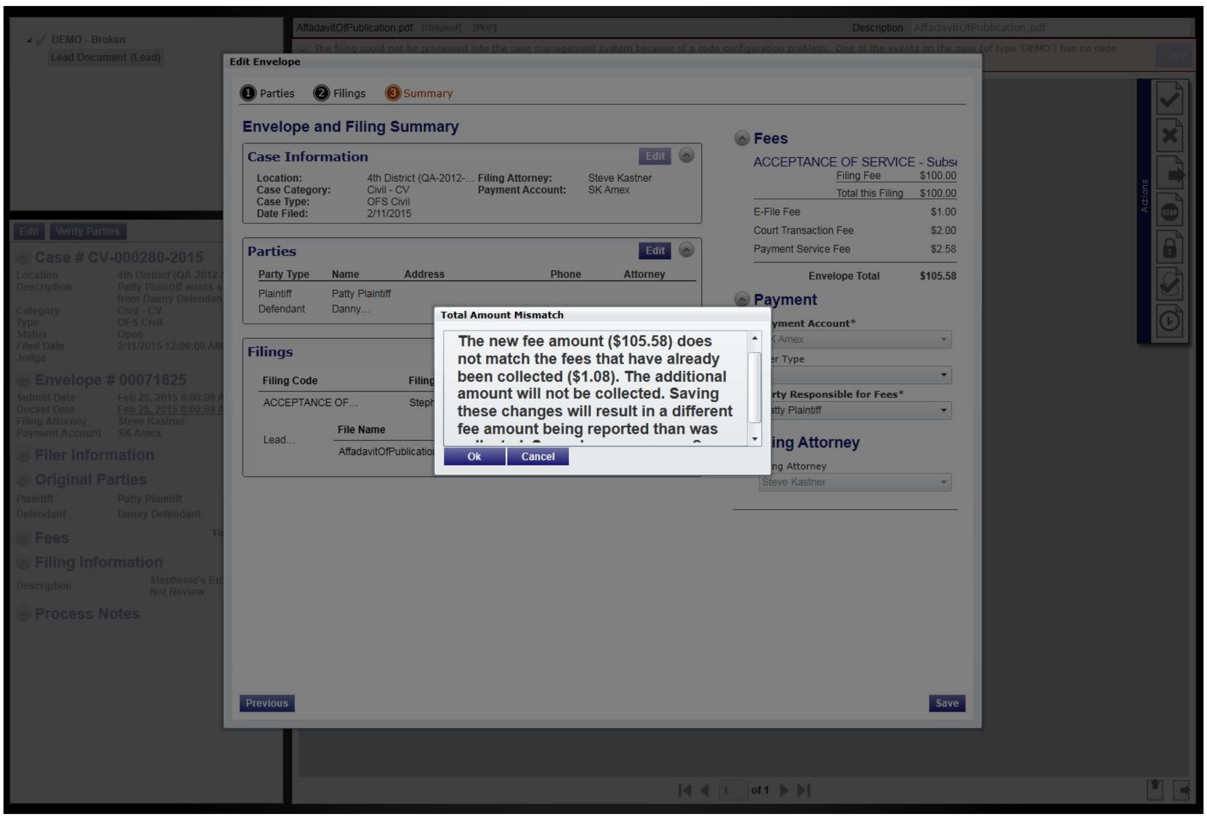


Figure 10.11 – Total Amount Mismatch Error Message

Verify Party Information

The *Verify Parties* window is used to verify party information.

Parties Section

The **Parties** section displays information about the parties connected to a case.

Click **Verify Parties** to view the party information.

The *Verify Parties* window opens.

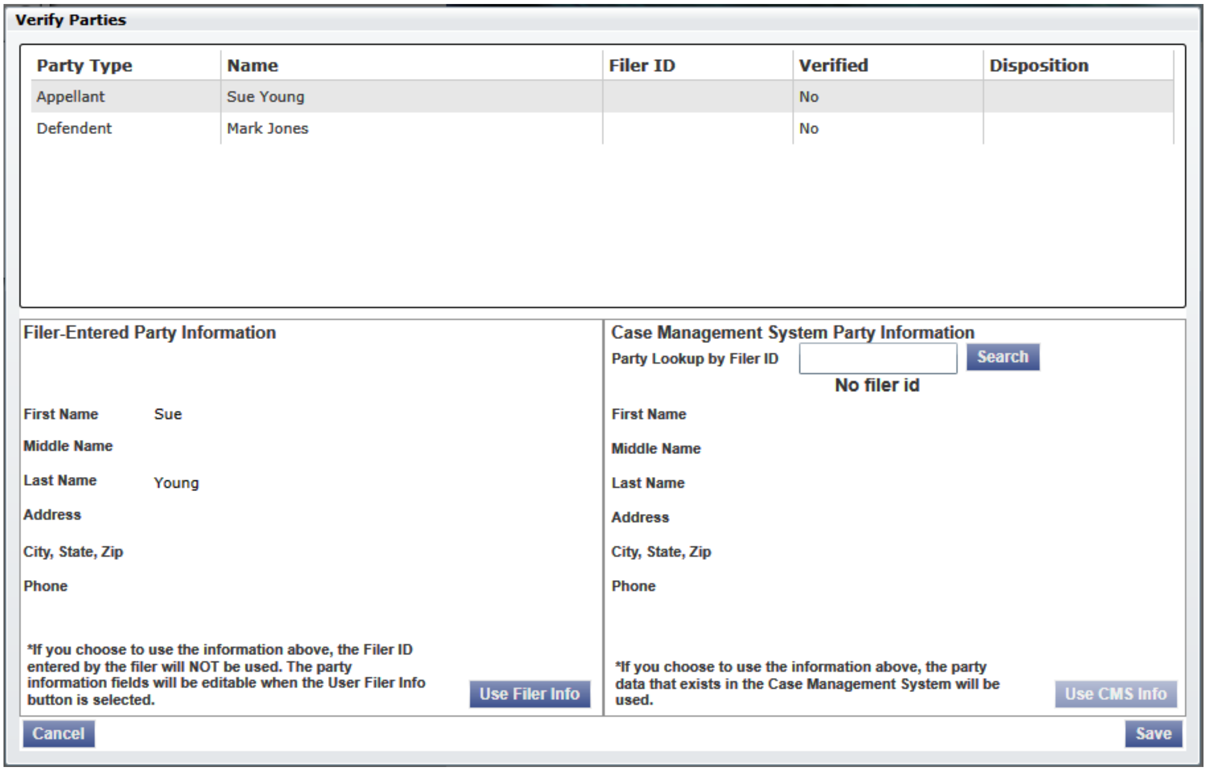


Figure 10.12 – Verify Parties Window

For new cases, you can edit the party information by clicking **Use Filer Info** in the **Filer-Entered Party Information** pane. If you are reviewing a new case filing, ensure that the party information is accurate before accepting the new case filing. For subsequent filings, the party information cannot be edited.

Filer-Entered Party Information Section

The **Filer-Entered Party Information** section displays the name and address of the party entered by the filer.

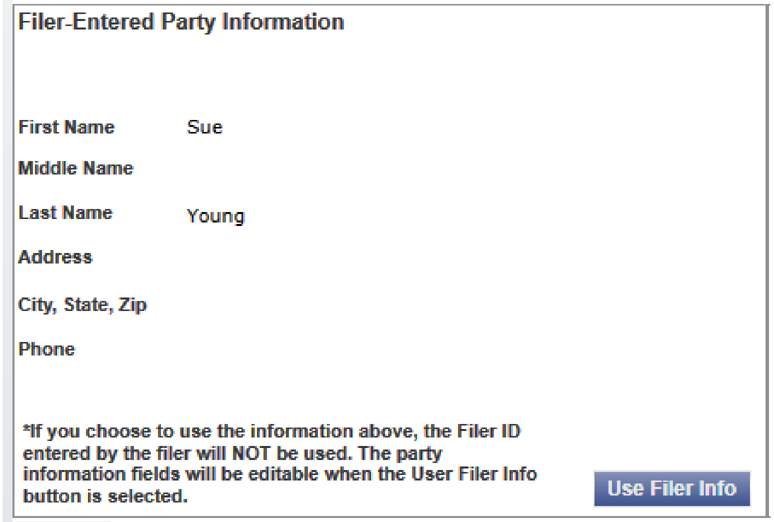


Figure 10.13 – Filer-Entered Party Information Section

Case Management System Party Information Section

The **Case Management System Party Information** section pulls filer information from the party information that is entered into the case management system.

Enter the filer ID in the field provided, and then click **Search** to populate the fields.

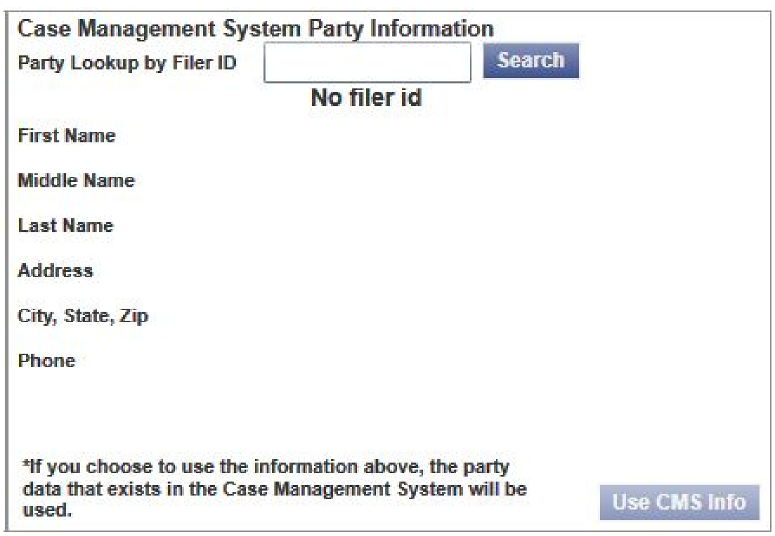


Figure 10.14 – Case Management System Party Information Section

Viewing Service Contacts History

To view the history of a service contact, perform the following steps:

1. Click **WORKSPACE** at the top of the page.

   The *Review Queue* page is displayed.
2. Locate the case for which you want to view a service contact's history.

3. Click for the case that you want to retrieve.

   The *Review Queue User Interface* window is displayed.

4. Click to view the service contact information.

   The *Manage Case Service Contacts* window is displayed.

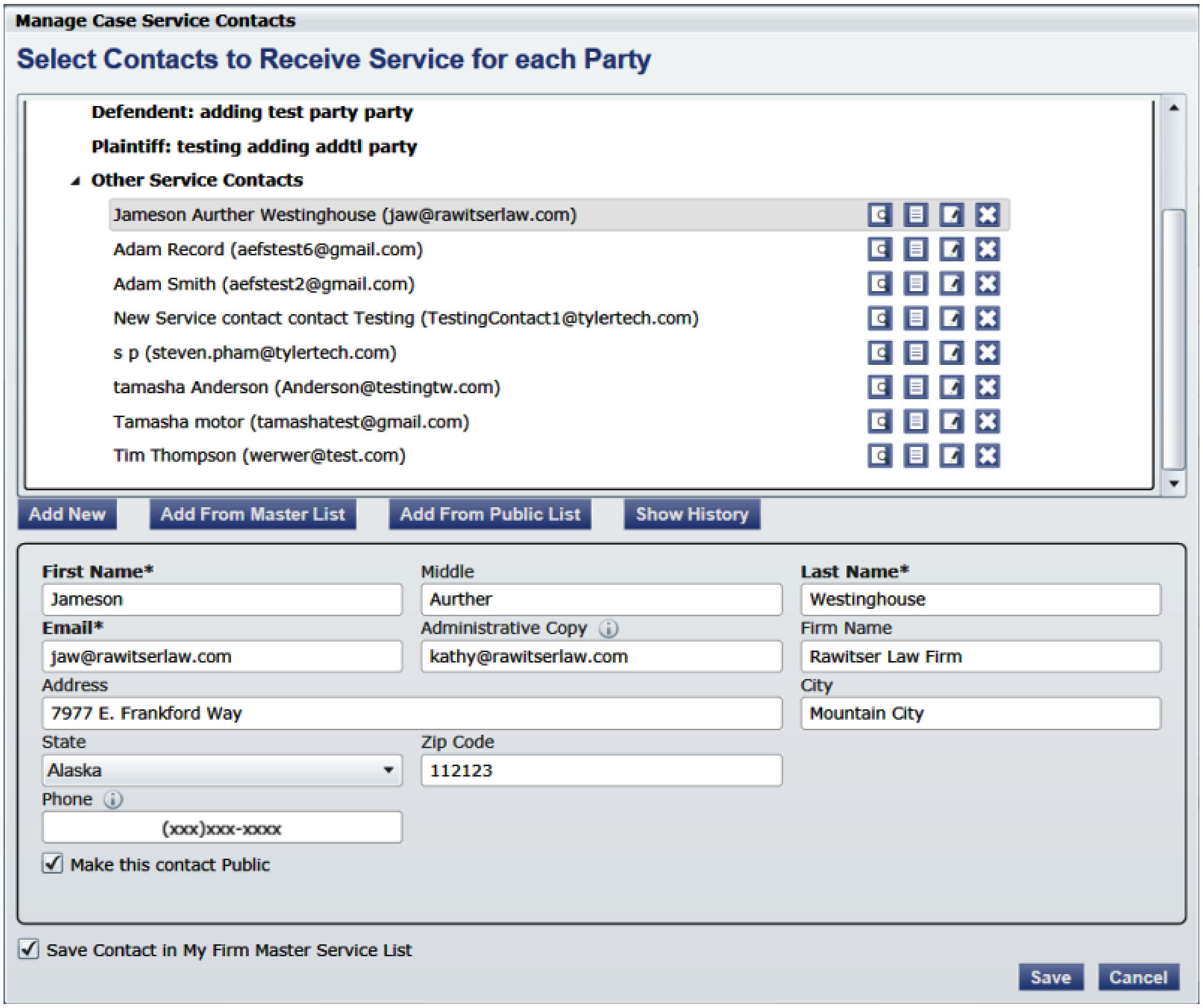


Figure 10.15 – Manage Case Service Contacts Window

5. Select a service contact from the list.
6. Click **Show History** to view the history of the contact that you selected.

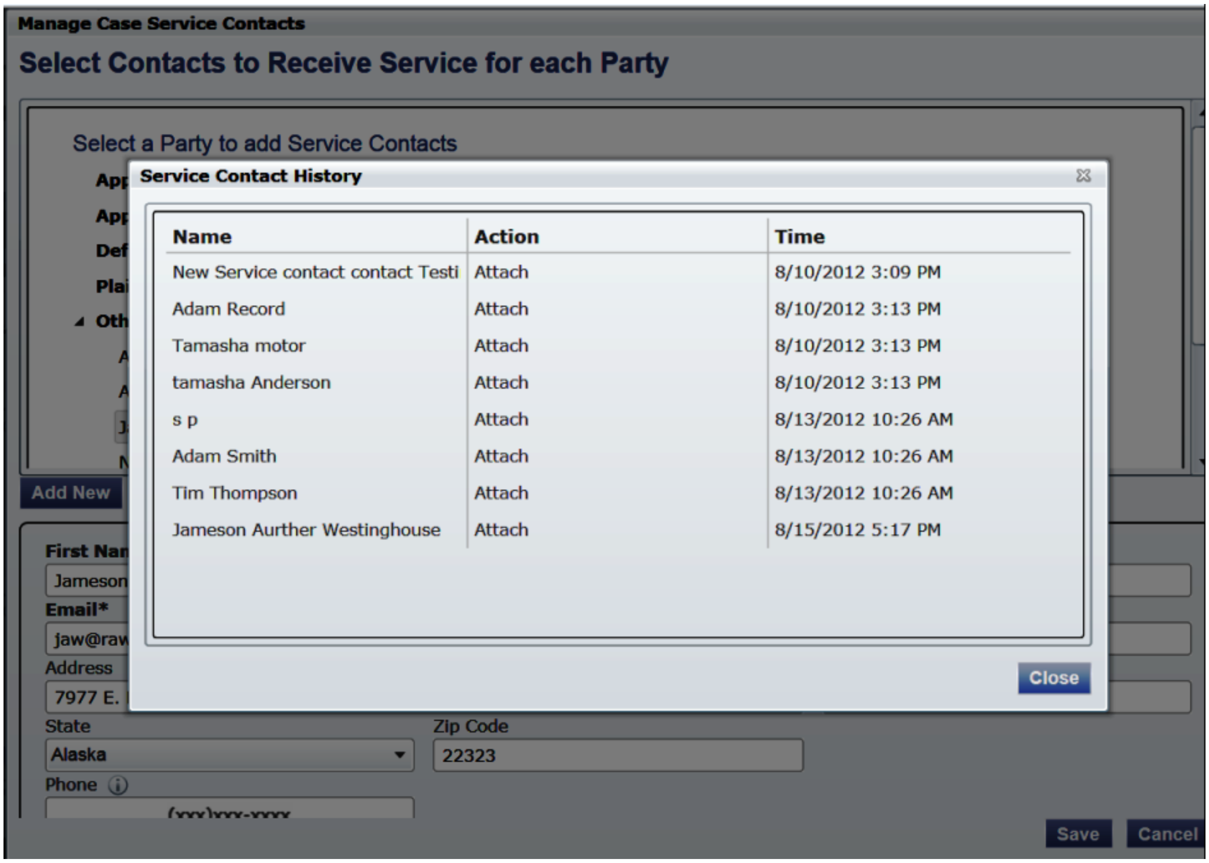


Figure 10.16 – Service Contact History Window

7. Click Close to close the window and return to the *Manage Case Service Contacts* window.

Review Case Information

The **Case Information** section displays the case filing information.

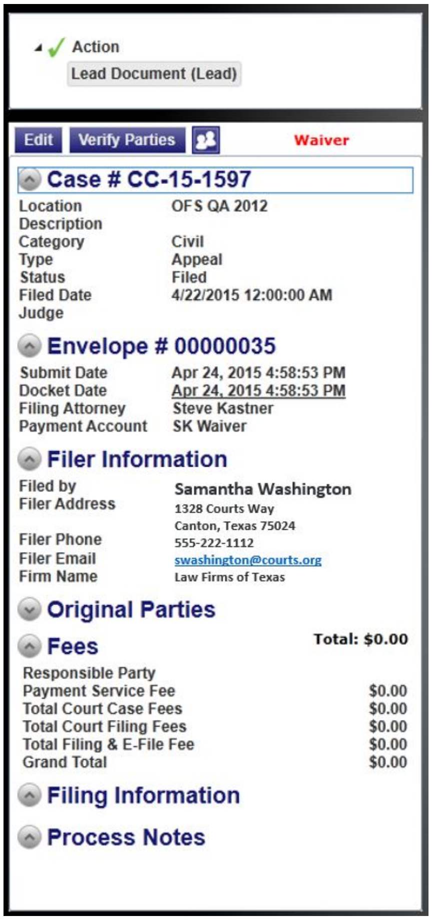


Figure 10.17 – Case Information Section

While in this section, perform the following tasks:

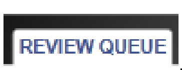
- Check the case information to ensure that the information is correct.
- Check to see whether a judge is assigned to the case.

  Note: Certain case types require the reviewer to assign a judge to the case.

Manually Assigning a Judge to a Case

You can manually assign a judge to a case by using the manual judge assignment feature.

To manually assign a judge to a case, perform the following steps:

1. Click 

.

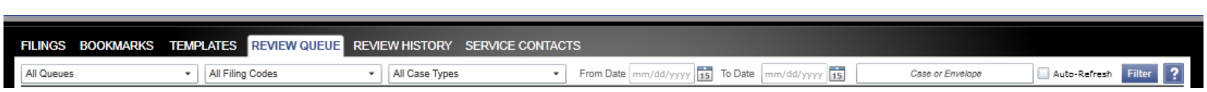


Figure 10.18 – Review Queue Page

2. Select a judge from the drop-down list of judges in the **Case Information** section.

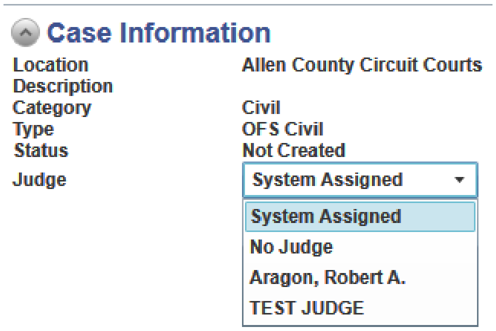


Figure 10.19 – Judge Selection Drop-down List

This action assigns the selected judge to the case.

Review Envelope Information

Envelope Section

The **Envelope** section displays the envelope number for a new filing or the case number for a subsequent filing, the submitted and docket date, the filing attorney for the case, and the type of payment account associated with the case.

Click to collapse the information, or click to expand the information.

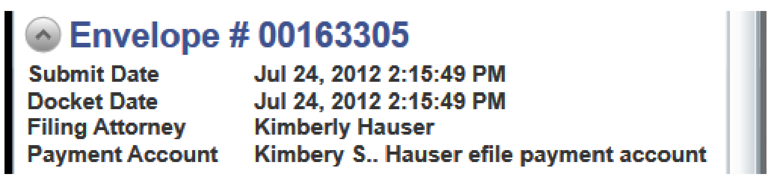


Figure 10.20 – Envelope Information Section

Review the envelope information to ensure that the information is correct.

Review Filer Information

The filer's contact information is displayed in the **Filer Information** section.

Click to collapse the information, or click to expand the information.

Review the **Filer Information** section to verify the contact information.

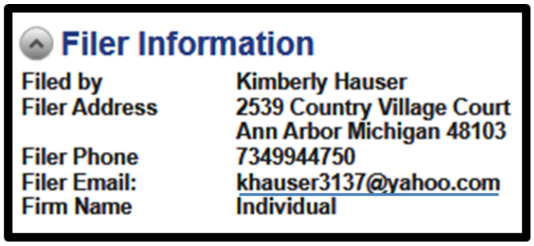


Figure 10.21 – Filer Information Section

Editing Docket Date and Time

To edit the docket date and time, perform the following steps:

1. Click the underlined link under the date and time to edit the current docket date.

   The calendar and clock are displayed.
2. Select a different docket date and time from the date and time drop-down lists.

Figure 10.22 – Docket Date Calendar

Sending Emails to Filer

A reviewer can send an email to the filer's email address listed under **Filer Information** in the **Envelope** section.

To send an email to the filer, perform the following steps:

1. In the **Filer Information** section, click the email address link next to the **Filer Email** field.

Figure 10.23 – Filer Information Section

   This action opens your default email tool as a mailto: link.

Note: Some browser or system combinations open a new browser window or tab. This is an expected behavior and a result of how the Silverlight plug-in interacts with the browser and operating system for opening mailto: links.

2. Type the email and send it to the filer.

Review Original Parties

The **Original Parties** section provides information about the parties that initiated the filing.

Click to collapse the information, or click to expand the information.

Review the **Original Parties** section to determine the parties that initiated this filing.

Figure 10.24 – Original Parties Section

Filing Fees

The **Fees** section displays the filing fees set by the courts.

Note: If you are reviewing a new case filing, review the filing fees to confirm that they are accurate before accepting the new case filing as this will charge the payment account when accepted.

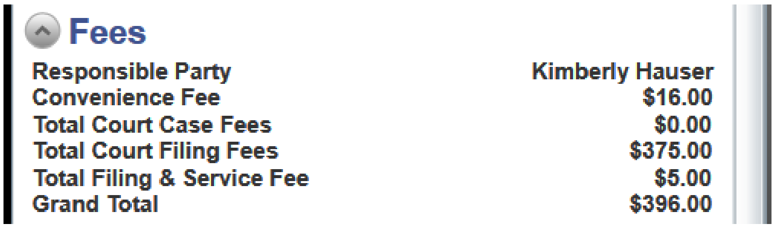


Figure 10.25 – Filing Fees

Maximum Fee Amount Set by Filer

The system prevents a reviewer from changing the filing fees if the change would cause the total filing fee to exceed the maximum amount the filer set. If a reviewer attempts such a change, the system will generate an error message.

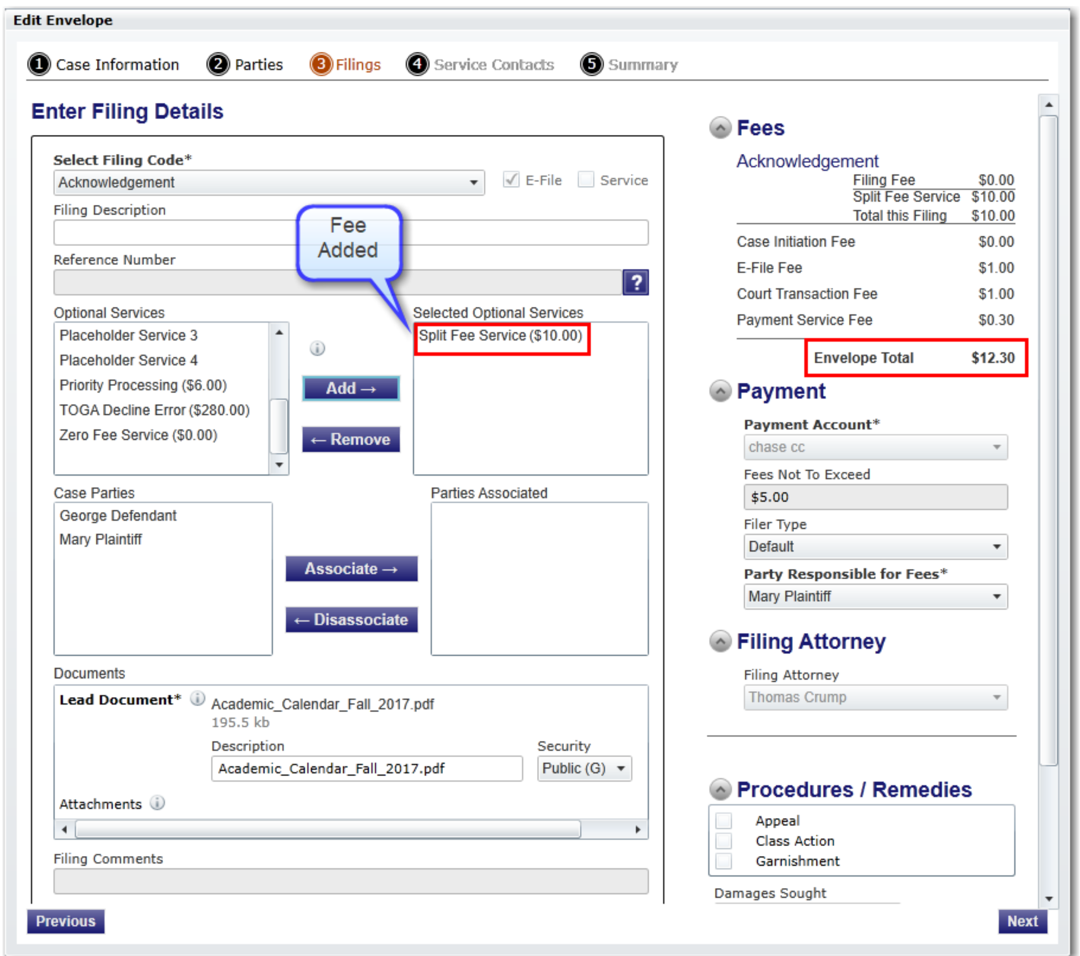


Figure 10.26 – Fee Added by Reviewer

Although the reviewer will be allowed to add fees during the review, the system displays an error message when the reviewer attempts to save the filing.

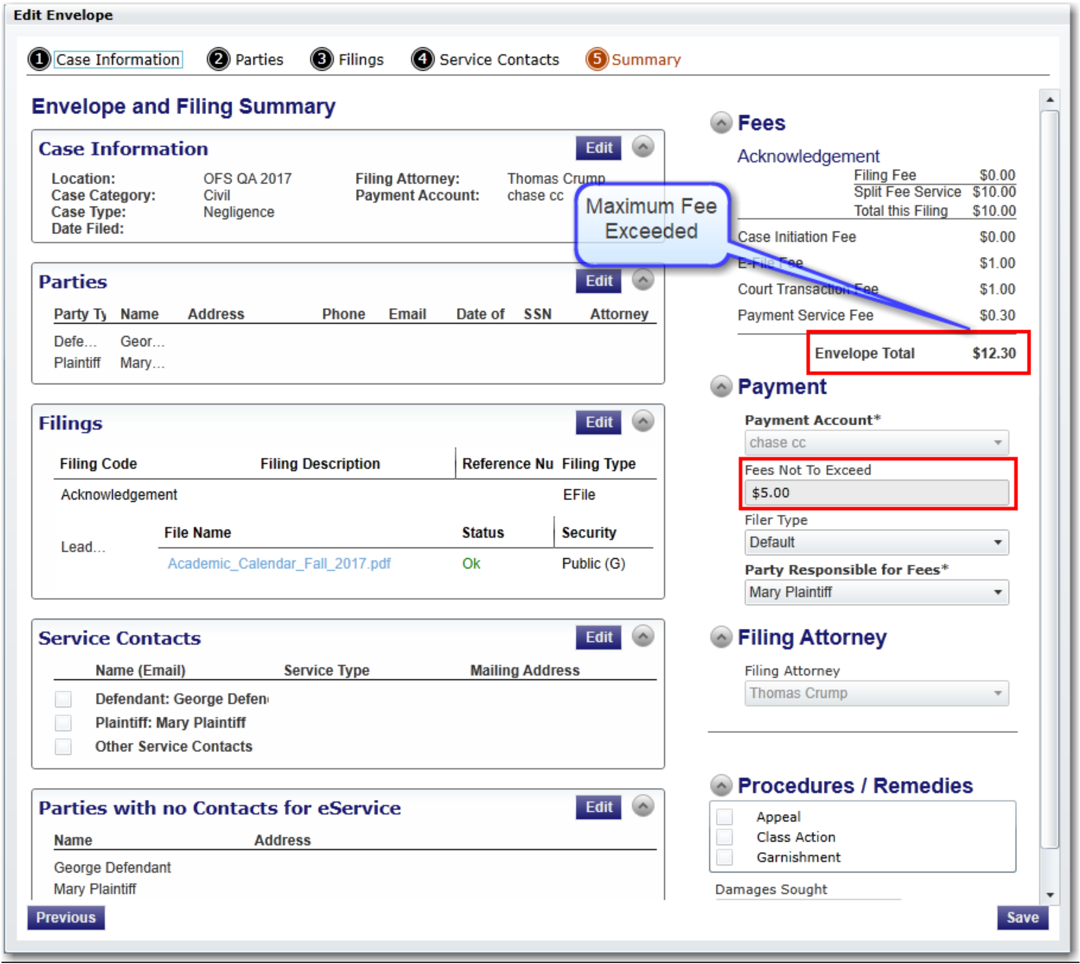


Figure 10.27 – Envelope Summary Showing the Maximum Filing Fee Exceeded

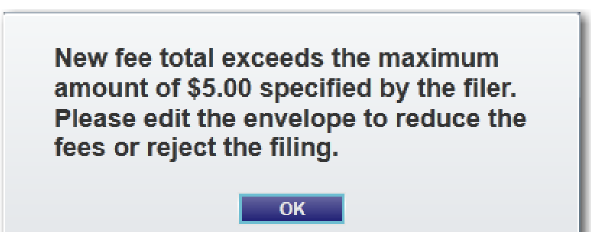


Figure 10.28 – Sample Error Message Displayed on the Summary Page

The reviewer cannot complete the review until he or she edits the envelope and reduces the fees. If the reviewer does not reduce the fees, he or she will have to reject the filing.

Review Filer Comments

The **Filer Comments** section includes any comments that the filer may have added for the reviewer to read.

Click to collapse the information, or click to expand the information.

Review the **Filer Comments** section for any comments that the filer may have entered.

Figure 10.29 – Filer Comments Section

Review Filing Information

The **Filing Information** section includes information about any parties associated with the filing.

Click to collapse the information, or click to expand the information.

Review the **Filing Information** section to determine which parties are associated with the filing.

Figure 10.30 – Filing Information Section

Review Process Notes

The **Process Notes** section includes notes that reviewers add to a filing for their organization.

Click to collapse the information, or click to expand the information.

Review the **Process Notes** section for any notes that a reviewer may have entered.

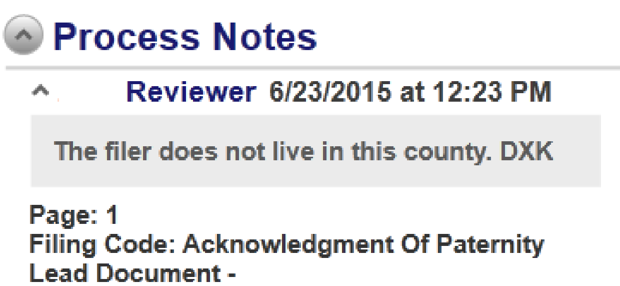


Figure 10.31 – Process Notes Section

Note: Process notes are written by reviewers while working on a filing. These notes are used for internal communication only. Process notes are not a part of the filing. They are not transmitted to the case management system, and they can only be seen by other reviewers in their court.

11 Adding Annotations

Topics Covered in this Chapter

Use the **Annotations** toolbar to add text annotations and lines to documents. You can also rotate a page, highlight text, or upload and apply images on documents using the image stamps.

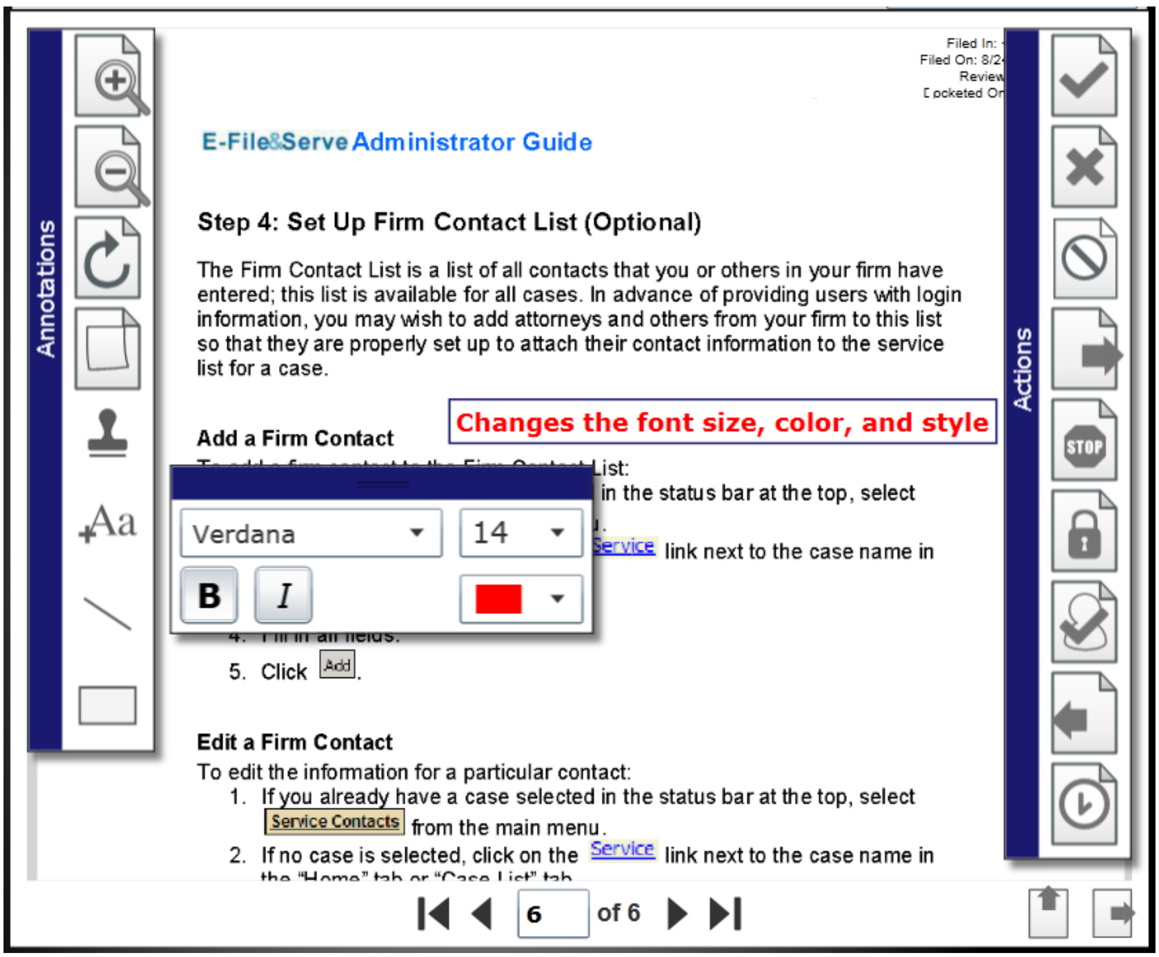


Figure 11.1 – Document Display Window with Annotations

To add annotations, perform the following steps:

1. Click the zoom buttons on the **Annotations** toolbar to zoom in or out, as follows:

   - Click  to zoom in on the document.
   - Click  to zoom out from the document.

2. Click  to rotate the current page 90 degrees clockwise.
3. Click  to add process notes to the document.

   Note: By default, when you enter process notes, My Organization is automatically selected in the Viewable by drop-down list, which makes the notes viewable to the reviewers in your organization. These notes are used for internal communication only. Process notes are not a part of the filing. They are not transmitted to the case management system, and they can only be seen by other reviewers in their court.

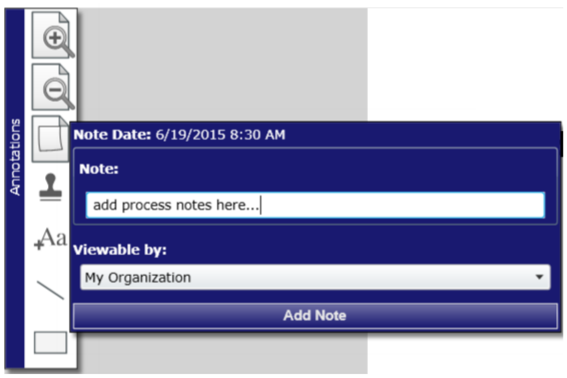


Figure 11.2 – Adding Process Notes

4. Click  to add the available text or image stamps options to the document.

   The image stamp gives the reviewer the ability to upload and apply images on documents during the review process.

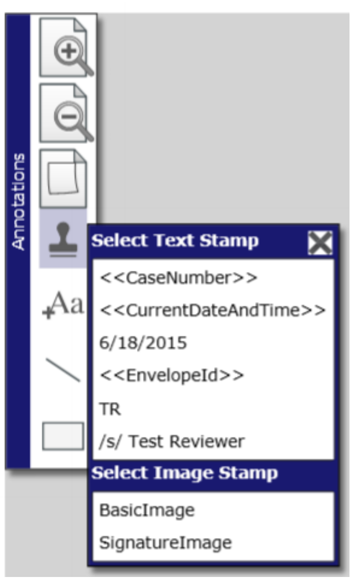


Figure 11.3 – Text and Image Stamps

5. From the list, select the type of stamp to apply to the document.

6. Pause on the document area, and click the section where you want the stamp to be applied.

   The stamp is applied to the document.

7. Click to add a text annotation.

   The text annotation dialog box opens as you begin typing.
8. Use the text annotation dialog box to modify the font face, size, characteristics, and color.

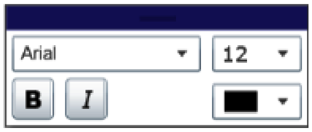


Figure 11.4 – Modifying Text Annotations

9. Click to add a line annotation to your document.

   The line annotation dialog box is displayed.
10. From the two drop-down lists, make the appropriate selections to modify the size and thickness of the line.

Figure 11.5 – Modifying Line Annotations

11. Click to add a yellow highlight box to the document.
12. Click and drag your mouse over the area that you want to highlight to draw the box.

Zoom In and Out

Use the zoom buttons on the **Annotations** toolbar to zoom in or out, as follows:

- Click to zoom in on the document.
- Click to zoom out from the document.

Paging Arrows

The paging arrows allow you to access different pages in the document, as follows:

- goes to the first page of the document.
- goes to the previous page.

-  goes to the next page.
-  goes to the last page.

Note: You must use the paging arrows to navigate to a specific page. Review actions vary depending on client site.

Fit-to-Window Arrow Buttons

The fit-to-window arrow buttons allow you to modify the document display, as follows:

- Click  to scale the image so that it fits the entire height of the *Document Display* window. The width automatically scales to the new height, ensuring that the document's visual presentation is not distorted.
- Click  to scale the image so that it fits the entire width of the *Document Display* window. The height automatically scales to the new width, ensuring that the document's visual presentation is not distorted.

12 Perform Review Actions

Topics Covered in this Chapter

♦ Returning for Resubmission

The reviewer can use the **Review Actions** toolbar to perform review actions on a filing.

Figure 12.1 – Review Actions Toolbar

Note: The options available on the toolbar vary based on site requirements.

Accept Filing

Click  to accept the filing.

Note: If prompted, enter the case number in the Case Information field in the format assigned by your court.

Figure 12.2 – Accept the Filing Icon and Comment Window

When you select the arrow on the bottom of the icon, the *Comment* dialog box opens.

You can type notes in the **Comment** field.

Reject Filing

Click  to reject the filing.

Note: The system requires the reviewer to give a reason when rejecting a filing.

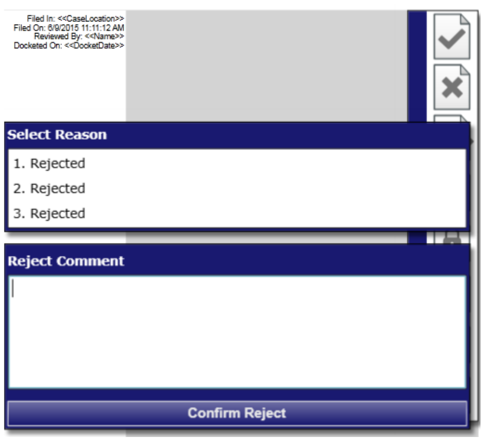


Figure 12.3 – Reject the Filing Icon, Select Reason Dialog Box, and Reject Comment Dialog Box

When you select the arrow on the bottom of the icon, the *Select Reason* dialog box opens.

You can select the reason from the drop-down list and enter additional notes regarding the rejection in the **Comment** field.

When a filer's submission fails, the reviewer can send a notification to the filer that the submission failed to allow resubmission of the filing.

Note: A reviewer can reject a filing for technical reasons. For example, the submitted document may be password protected, and the reviewer is unable to open the document. The reviewer can reject the document, with the request to unlock the document for viewing.

Fail Submission

Click  to send a submission notification to the filer.

When a filer's submission fails, the reviewer can send a notification to the filer that the submission failed to allow resubmission of the filing.

Note: A reviewer can reject a filing for technical reasons. For example, the submitted document may be password protected, and the reviewer is unable to open the document. The reviewer can reject the document, with the request to unlock the document for viewing.

Forward Filing

Click  to forward the filing to another queue.

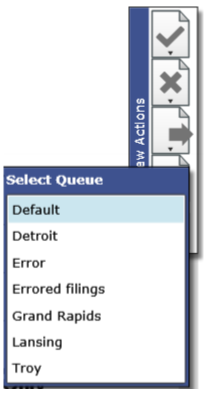


Figure 12.4 – Forward Filing Icon and Select Queue Dialog Box

When you select the arrow on the bottom of the icon, the *Select Queue* dialog box opens. Select a queue from the list.

End Review

Click  to end the review and return the filing to the queue without changing the status.

Document Security

Click  to change the security of the document.

Note: The color changes when the icon is selected.

The *Select Document Type* dialog box opens.

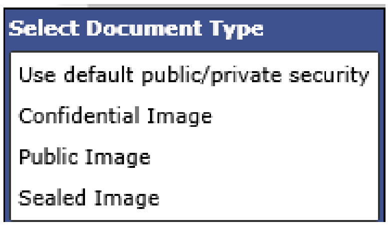


Figure 12.5 – Select Document Type Dialog Box

Note: This selection only affects the security for the document that is displayed, not the security for the entire envelope.

Manually Accept

Note: Prior to selecting the Manually Accept filing icon, create a case number in the case management system for the case that you plan to manually accept. When you manually accept a filing, the case number is not automatically assigned to the initial case.

Click to manually accept the filing.

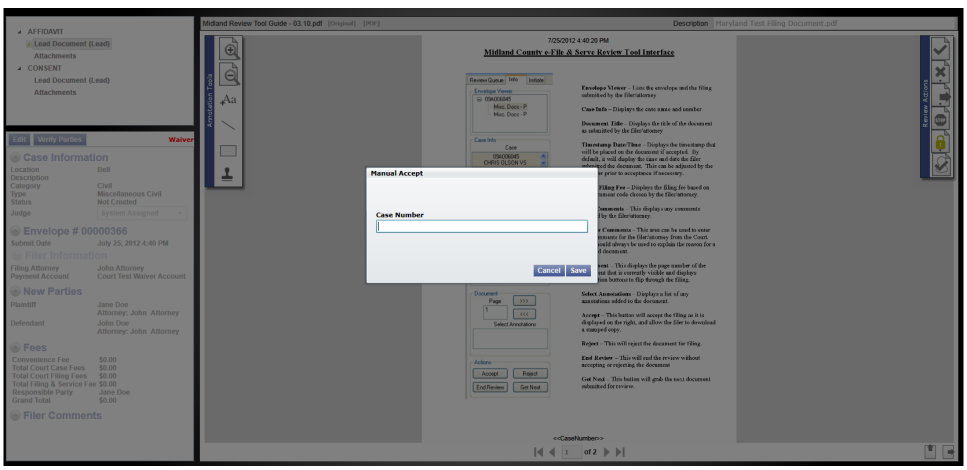


Figure 12.6 – Manual Accept Dialog Box

Note the following details:

- The manual accept action requires a case number to be provided before the review is completed.
- The filing is marked as accepted.
- Service notifications are sent.
- Financial information is captured in Chase.

Return Filing

Click to return filings that have missing or incorrect information.

Note: Before returning the filing to the filer, the reviewer or the court should inform the filer as to which corrections must be made.

Once the filing is returned to the filer, the following actions occur:

- The filing leaves the Review Queue.
- The filing status returns to the Submitted status.
- The filing is displayed in the filer's filing queue with the Submitted status and no notes to indicate the reason it was returned.

The filer must cancel the filing and do one of the following:

- Copy the envelope.
- File into the case, make the necessary changes to the filing, and resubmit.

This process generates a new envelope number and authorizes the filer's credit card a second time when necessary. The filer is not charged for the original envelope.

Returning for Resubmission

The Return for Revision or Resubmission feature alerts the reviewer to a filing that was copied from a previously rejected envelope. A yellow note is displayed in the form of a banner at the top of the window, and it provides details and a means of copying the docket date.

Note: You must have "Reviewer" rights to perform the following procedure.

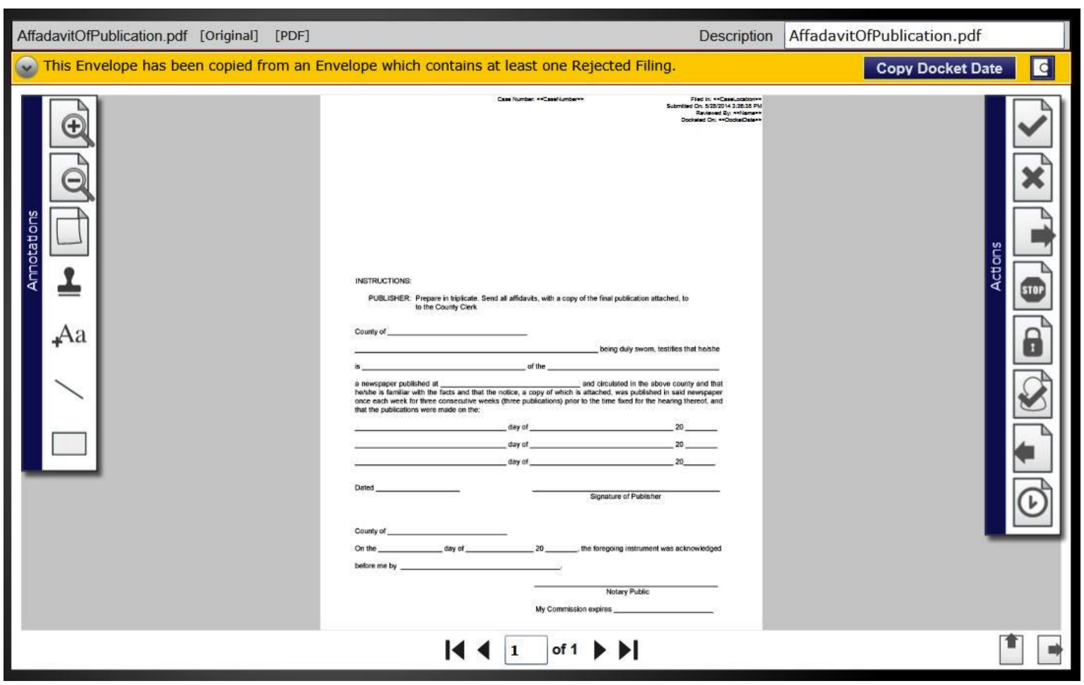


Figure 12.7 – Return for Resubmission Yellow Notice

To view a filing returned for submission, perform the following steps :

1. Log in.
2. Click **Review Queue**.
3. Click the filing that you want to work with.
4. Type the applicable information in the **Case** or **Envelope** input cell.
5. Click **Filter**.

6. Click .

The envelope date changes when a reviewer clicks **Copy Docket Date**. The docket date is copied to indicate that the rejected filing was submitted to the court on time.

Note: The default date for the docket date field is populated according to your system's configuration.

13 Review History

Review History is a main menu link visible to users with the Reviewer role. The history list includes previously accepted and rejected filings processed by the current reviewer along with filings the reviewer has previously worked with.

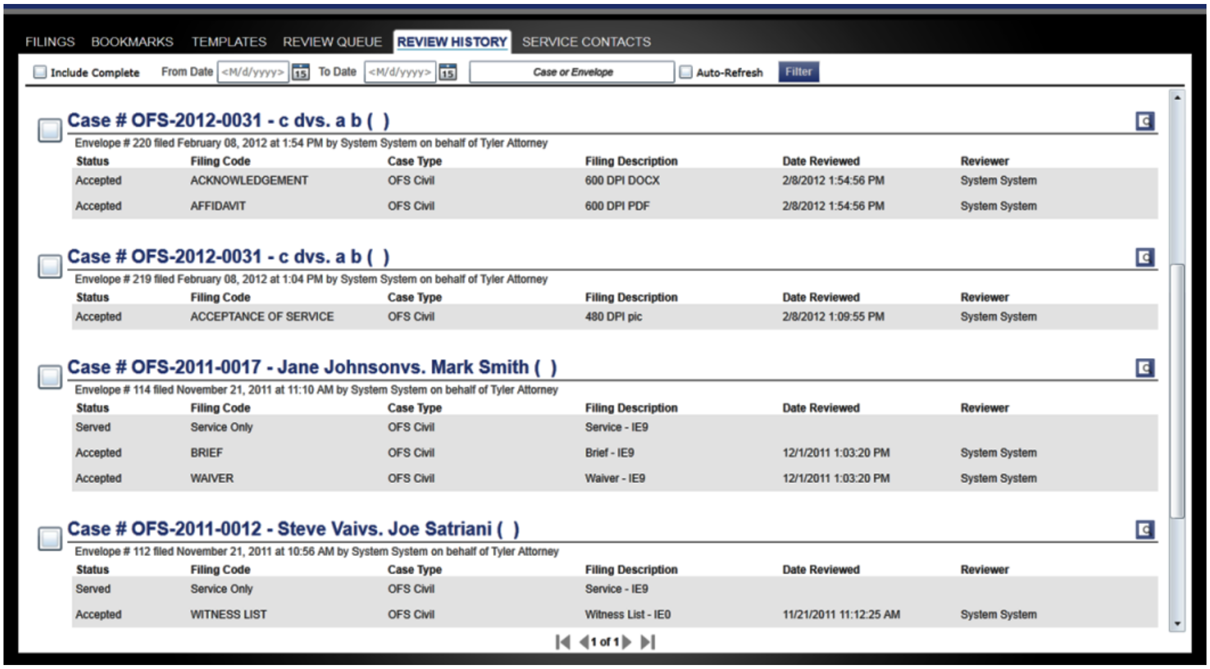


Figure 13.1 – Review History Page

Accessing the Review History

On the *Home* page, to access the review history, click 

.

Filtering Completed Reviews

Select the check box next to the envelope to mark it as complete. The envelope is immediately removed from the *Review History* page.

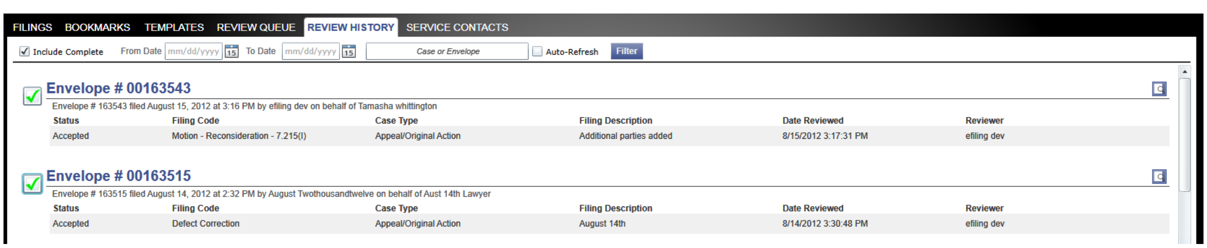


Figure 13.2 – Completed Check Box Selected on the Review History Page

Filtering Using Include Complete

To remove completed filings from the *Review History* page, clear the **Include Complete** check box. Then click 

.

To return completed filings that were previously filtered out back to your *Review History* page, select the **Include Complete** check box. Then click **Filter**.

14 Technical Support Contact Information

For assistance, contact technical support through the following resources.

Resource	Contact Information
Support Hours	7:00 a.m. to 9:00 p.m. (CT), Monday through Friday
Support Chat	Assistance is also available online through Support Chat.
Email	support@efiletexas.gov
Telephone	855.839.3453
GoTo Assist (Support)	Support may ask to assist you by sharing your screen using GoToAssist.