



**eFileTexas.gov™**

**Review Queue User Guide – Release 2017.1**

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## Publishing History

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# 1 Before You Begin

## Topics Covered in this Chapter

- ◆ Release 2017.1 New Features
- ◆ System Requirements
- ◆ Page Navigation
- ◆ Error Messages

This guide is intended for users with the reviewer role.

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

**i 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.

**Edit Envelope**

① Case Information   ② Parties   ③ Filings   ④ Service Contacts   ⑤ Summary

### Enter Filing Details

**Select Filing Code\***  
Acknowledgement ☒ E-File ☐ Service

Filing Description

Reference Number

**Optional Services**

- Placeholder Service 3
- Placeholder Service 4
- Priority Processing (\$6.00)
- TOGA Decline Error (\$280.00)
- Zero Fee Service (\$0.00)

**Selected Optional Services**

- Split Fee Service (\$10.00)

**Case Parties**

- George Defendant
- Mary Plaintiff

**Parties Associated**

**Documents**

**Lead Document\*** Academic\_Calendar\_Fall\_2017.pdf  
195.5 kb  
Description: Academic\_Calendar\_Fall\_2017.pdf  
Security: Public (G)

**Attachments**

Filing Comments

**Fees**

**Acknowledgement**

Filing Fee	\$0.00
Split Fee Service	\$10.00
<b>Total this Filing</b>	<b>\$10.00</b>

Case Initiation Fee \$0.00  
E-File Fee \$1.00  
Court Transaction Fee \$1.00  
Payment Service Fee \$0.30

**Envelope Total \$12.30**

**Payment**

**Payment Account\***  
chase cc

Fees Not To Exceed  
\$5.00

Filer Type  
Default

**Party Responsible for Fees\***  
Mary Plaintiff

**Filing Attorney**

Filing Attorney  
Thomas Crump

**Procedures / Remedies**

- ☐ Appeal
- ☐ Class Action
- ☐ Garnishment

Damages Sought

**Previous** **Next**

**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.

**Edit Envelope**

1 Case Information 2 Parties 3 Filings 4 Service Contacts 5 Summary

### Envelope and Filing Summary

#### Case Information

Location: OFS QA 2017  
Case Category: Civil  
Case Type: Negligence  
Date Filed:

Filing Attorney: Thomas Crump  
Payment Account: chase cc

**Maximum Fee Exceeded**

#### Parties

Party Ty	Name	Address	Phone	Email	Date of	SSN	Attorney
Defe...	Geor...						
Plaintiff	Mary...						

#### Filings

Filing Code	Filing Description	Reference Nu	Filing Type
Acknowledgement			EFile

Lead...	File Name	Status	Security
	Academic_Calendar_Fall_2017.pdf	Ok	Public (G)

#### Service Contacts

Name (Email)	Service Type	Mailing Address
<input type="checkbox"/> Defendant: George Defen...		
<input type="checkbox"/> Plaintiff: Mary Plaintiff		
<input type="checkbox"/> Other Service Contacts		

#### Parties with no Contacts for eService

Name	Address
George Defendant	
Mary Plaintiff	

#### Fees

Acknowledgement	
Filing Fee	\$0.00
Split Fee Service	\$10.00
Total this Filing	\$10.00
Case Initiation Fee	\$0.00
Enfil Fee	\$1.00
Court Transaction Fee	\$1.00
Payment Service Fee	\$0.30
<b>Envelope Total</b>	<b>\$12.30</b>

#### Payment

Payment Account\*  
chase cc

**Fees Not To Exceed**  
\$5.00

Filer Type  
Default

Party Responsible for Fees\*  
Mary Plaintiff

#### Filing Attorney

Filing Attorney  
Thomas Crump

#### Procedures / Remedies

☐ Appeal  
☐ Class Action  
☐ Garnishment

Damages Sought

**Previous** **Save**

Figure 1.2 – Envelope Summary Showing the Maximum Filing Fee Exceeded

**New fee total exceeds the maximum amount of \$5.00 specified by the filer. Please edit the envelope to reduce the fees or reject the filing.**

**OK**

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.

**i 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.



<b>First Name*</b> Amanda	<b>Middle</b> T.	<b>Last Name*</b> Watson
<b>Email*</b> awatson@ops.gov	<b>Administrative Copy</b> ⓘ info@yourfirm.com	<b>Firm Name</b> Madison-Green Law Firm
<b>Country*</b> United States of America		
<b>Address Line 1*</b> 998877 Legal Way		
<b>City*</b> Montgomery		
<b>State*</b> Vermont	<b>Zip Code*</b> 54433	
<b>Phone</b> 876-555-1212		
<input checked="" type="checkbox"/> Make this contact Public		

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.

FILINGS

BOOKMARKS

TEMPLATES

SERVICE CONTACTS

My Firm

All Statuses

All Locations

From Date

<M/d/yyyy>

15

To Date

<M/d/yyyy>

15

Case or Envelope

Filter

Export

Case # 27-CV-12-113 - DJE Plaintiff Biz Pro Se Civ Discrim vs DJE Sarah LastName ( Hedlund, Deborah )

Envelope # 4645 filed March 21, 2012 at 3:48 PM by Devon Estes on behalf of Beth Lewandowski

Status	Filing Code	Filing Type	Filing Description	Reference Number
Accepted	Judgment	EFileAndServe	Judg	EFS

Case # 27-ET-CV-12-12 - ( )

Envelope # 4643 filed March 21, 2012 at 2:39 PM by Devon Estes on behalf of Mark Schwartz

Status	Filing Code	Filing Type	Filing Description	Reference Number
Accepted	Affidavit and Order for Dismissal	EFile	Power of Atty	DJE 1/1

Case # 27-CV-12-113 - DJE Plaintiff Biz Pro Se Civ Discrim vs DJE Sarah LastName ( Hedlund, Deborah )

Envelope # 4595 filed March 15, 2012 at 11:43 AM by Devon Estes on behalf of Mark Schwartz

Status	Filing Code	Filing Type	Filing Description	Reference Number
Rejected	Amended Petition	EFileAndServe	amended pet	1/3 EFS
Rejected	Notice of Withdrawal of Counsel	EFile	notice of withdrawal of counsel	2/3 EFO

<<

>>

1 of 5

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.

The screenshot shows a web form titled "Enter the Details for the New Case" with a navigation bar at the top containing four tabs: "1 Case Information", "2 Parties", "3 Filings", and "4 Summary". Below the title, a note states: "Required fields are bold and have an asterisk (\*)." The form contains several fields: "Select Location\*" (a dropdown menu), "Select Category\*" (a dropdown menu with a red "Required Field" label next to it), "Select Case Type\*" (a dropdown menu), "Short Title" (a text input field with a blue question mark icon), "Filing Attorney\*" (a dropdown menu), and "Payment Account\*" (a dropdown menu). At the bottom left is an "Exit" button and at the bottom right is a "Parties" button.

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.

The screenshot shows a close-up of a "Zip\*" text input field. The field contains the text "654656". The entire input field is outlined with a thick red border. To the right of the input field is a red button with the text "Invalid Zip Code" in white.

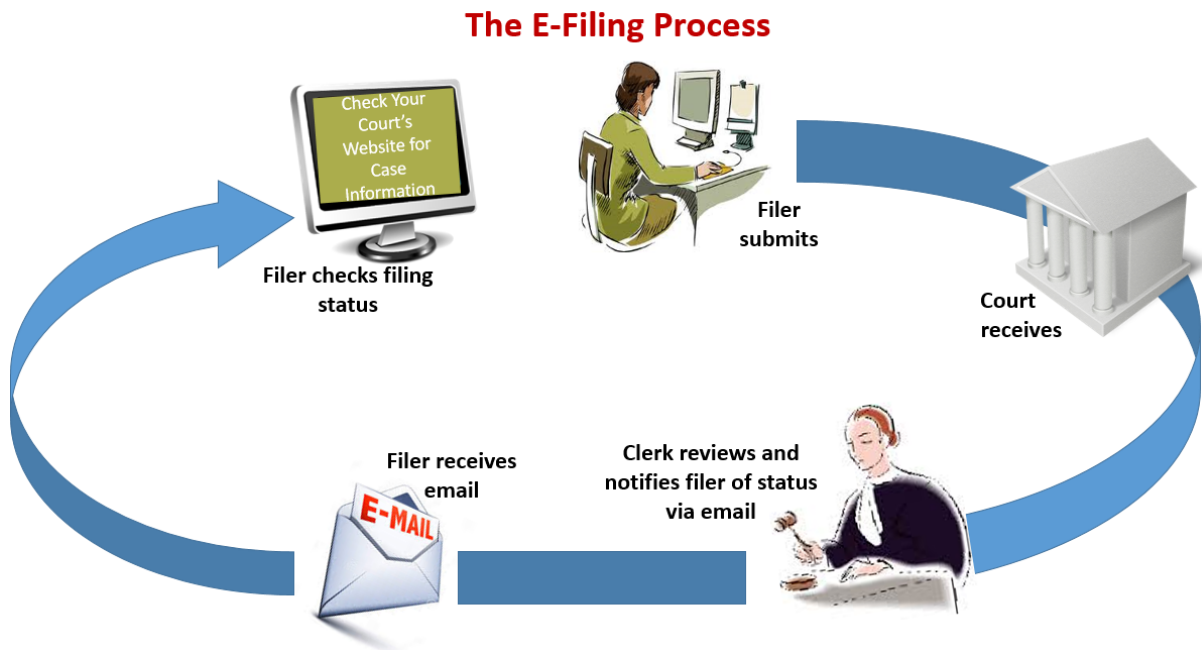
Figure 1.9 – Invalid Entry Error Message

## 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.

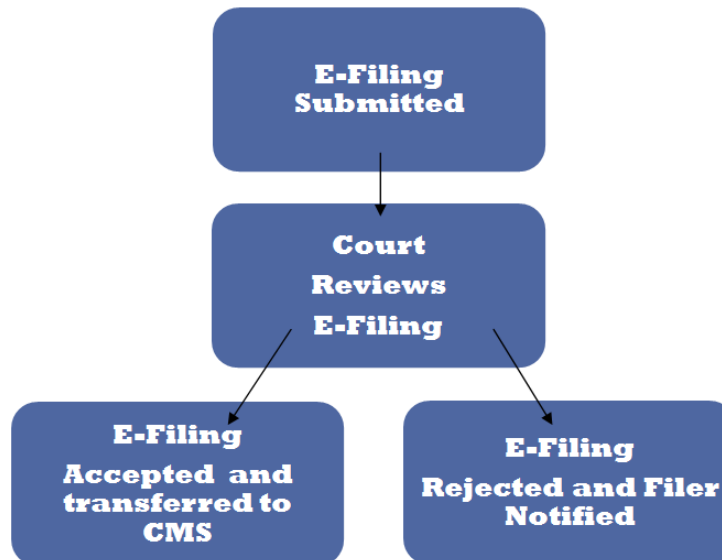


Figure 2.2 – Understanding the Review Queue Data Flow

## 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.

**i 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	<p>A clerk reviewer has selected a filing from a queue.</p> <p><b>Note:</b> 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.</p>
Received	EFO, EFS	<p>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.</p>
Accepted	EFO, EFS	<p>The reviewer has reviewed the filing and accepted it.</p>
Rejected	EFO, EFS	<p>The reviewer has reviewed the filing and rejected it.</p>
Returned	EFO, EFS	<p>The reviewer has reviewed and returned the filing as additional action must be taken by the filer.</p> <p><b>Note:</b> The filer can cancel or copy a filing in the Returned status.</p>
Served	SO	<p>Service Only filings are completed.</p>
Service Incomplete (Service Only filings)	SO	<p>One or more servings failed; the service was incomplete. Example: The email or domain was rejected.</p>
Canceled	EFO, EFS, SO	<p>The filer has canceled the filing. The filer can only cancel draft and submitted filings.</p>
Submission Failed	EFO, EFS	<p>A file format or billing error has occurred when the filer submitted the filing. Failure specifics are available on the <i>Details</i> page, and the filer is notified of specifics through email.</p>

# 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.

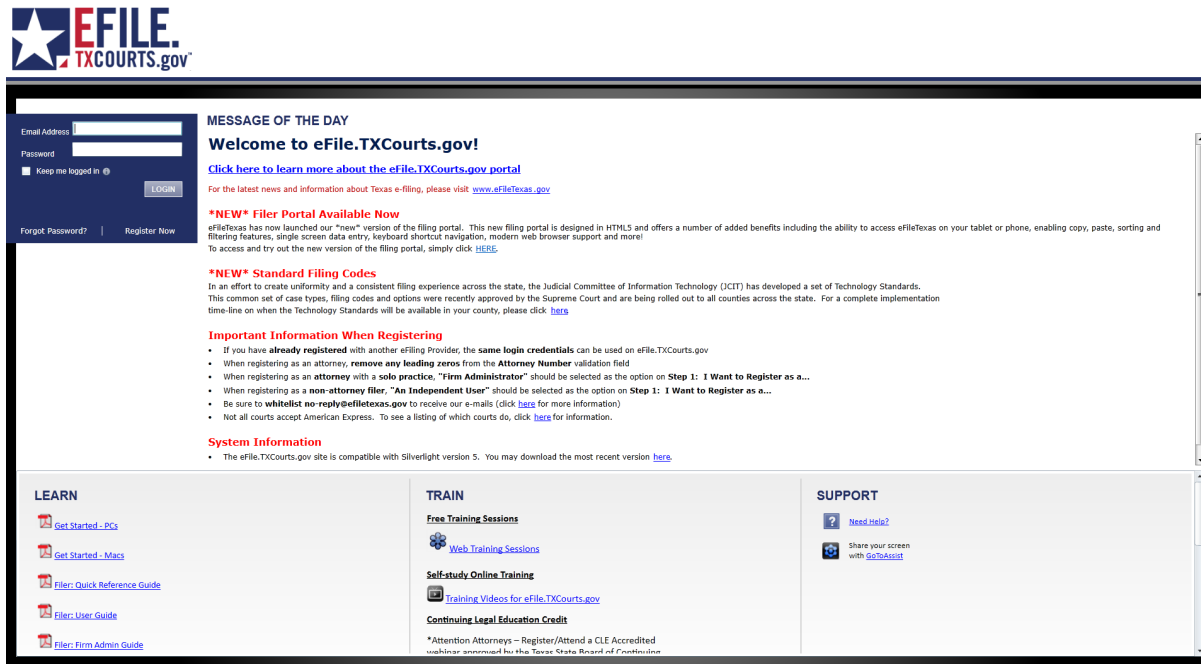


Figure 3.1 – eFileTexas.gov Home Page

## 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](mailto: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
- ♦ Registering as an Independent User

## 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.

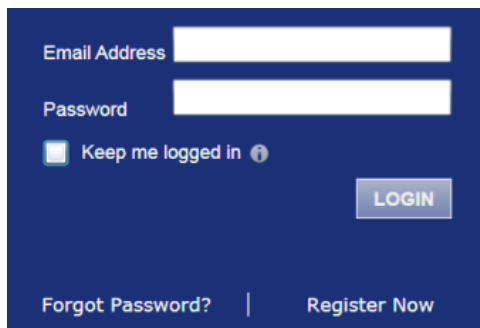


Figure 4.1 – Login Window

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?)



A screenshot of a web form showing a label 'Security Question\*' followed by an empty text input field.

Figure 4.2 – Security Question Field

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

A screenshot of a web form showing a label 'Security Answer\*' followed by an empty text input 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.

A screenshot of a web form showing a label 'Attorney Number\*' followed by an empty text input field.

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.

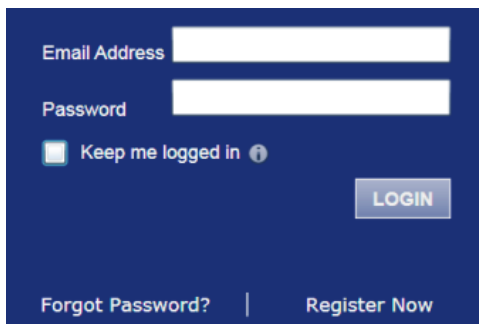


Figure 5.1 – Login Window

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.

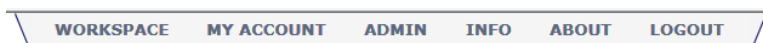


Figure 5.2 – Logout Link

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?**

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

**i 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.

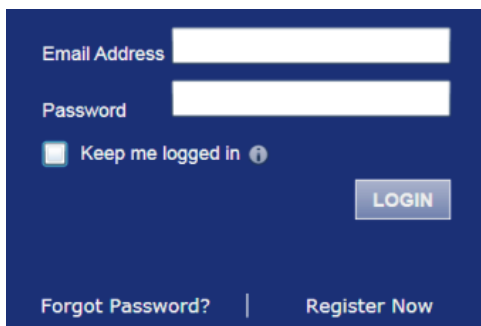
A login form with a dark blue background. It features two white input fields for 'Email Address' and 'Password'. Below the password field is a checkbox labeled 'Keep me logged in' with an information icon. A 'LOGIN' button is positioned to the right of the checkbox. At the bottom, there are two links: 'Forgot Password?' and 'Register Now', separated by a vertical line.

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

- ◆ Changing the User Password
- ◆ Changing the Security Question
- ◆ Managing Email Notifications
- ◆ Managing Reviewer Preferences

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.

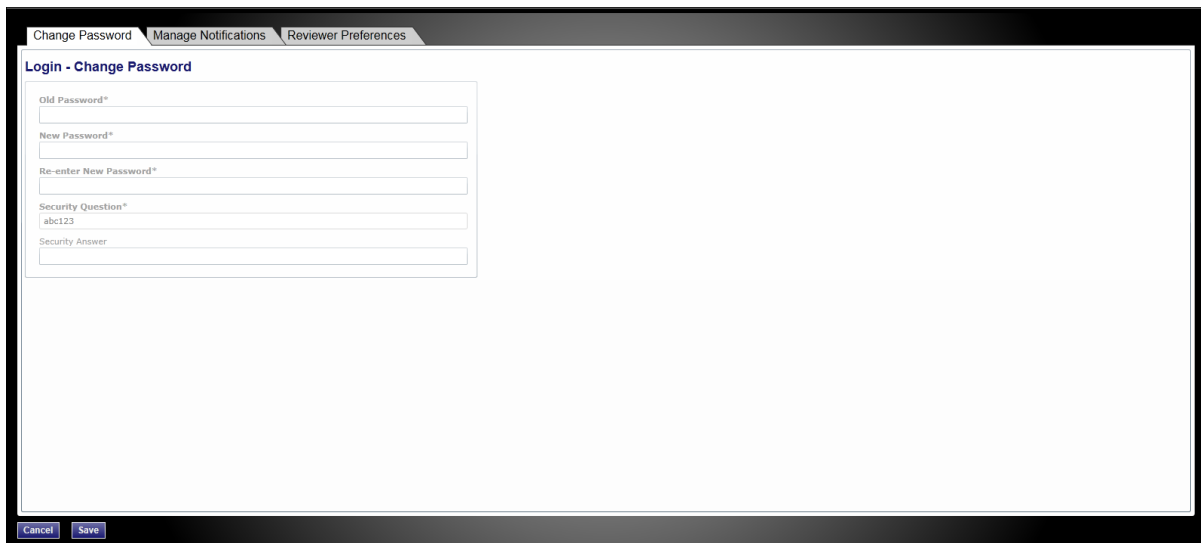


Figure 6.1 – Change Password Page

**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.

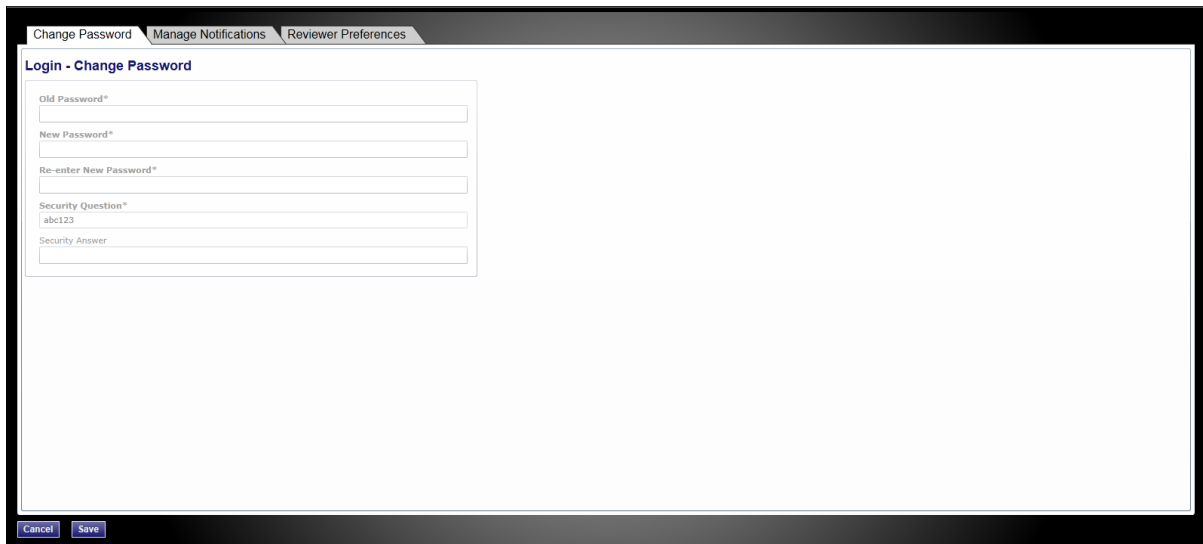
2. Complete the required fields.

**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.

The screenshot shows a web interface with a dark header bar containing three tabs: 'Change Password', 'Manage Notifications', and 'Reviewer Preferences'. The 'Change Password' tab is active. Below the header, the page title is 'Login - Change Password'. On the left side, there is a form with five input fields: 'Old Password\*', 'New Password\*', 'Re-enter New Password\*', 'Security Question\*', and 'Security Answer'. The 'Security Question\*' field contains the text 'abc123'. At the bottom of the form, there are two buttons: 'Cancel' and 'Save'.

**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.

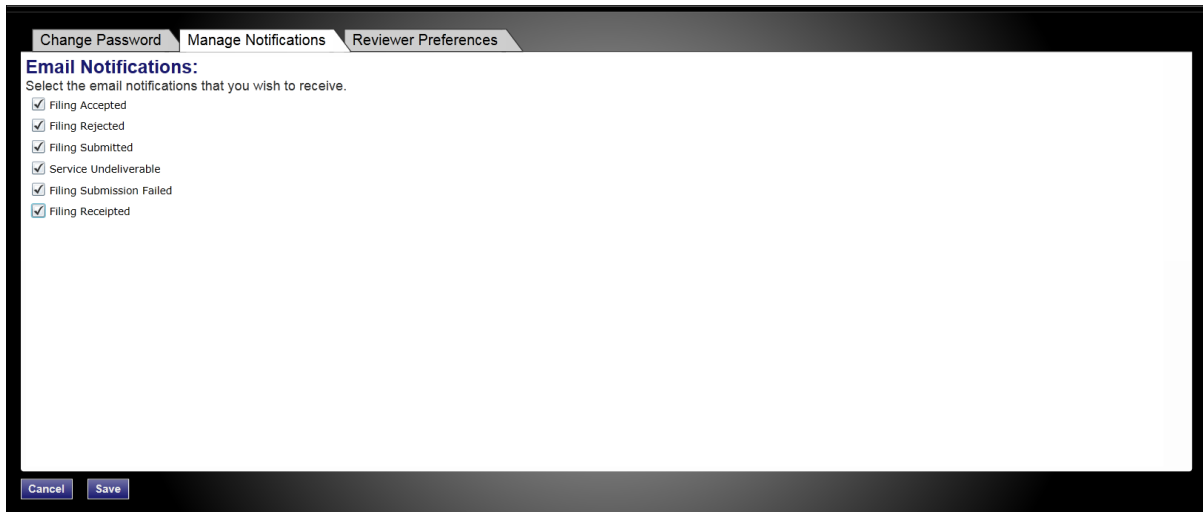
The screenshot shows a web application interface with three tabs: "Change Password", "Manage Notifications", and "Reviewer Preferences". The "Manage Notifications" tab is active. Below the tabs, the heading "Email Notifications:" is followed by the instruction "Select the email notifications that you wish to receive." There is a list of six notification types, each with a checked checkbox: "Filing Accepted", "Filing Rejected", "Filing Submitted", "Service Undeliverable", "Filing Submission Failed", and "Filing Received". At the bottom of the form, there are two buttons: "Cancel" and "Save".

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:

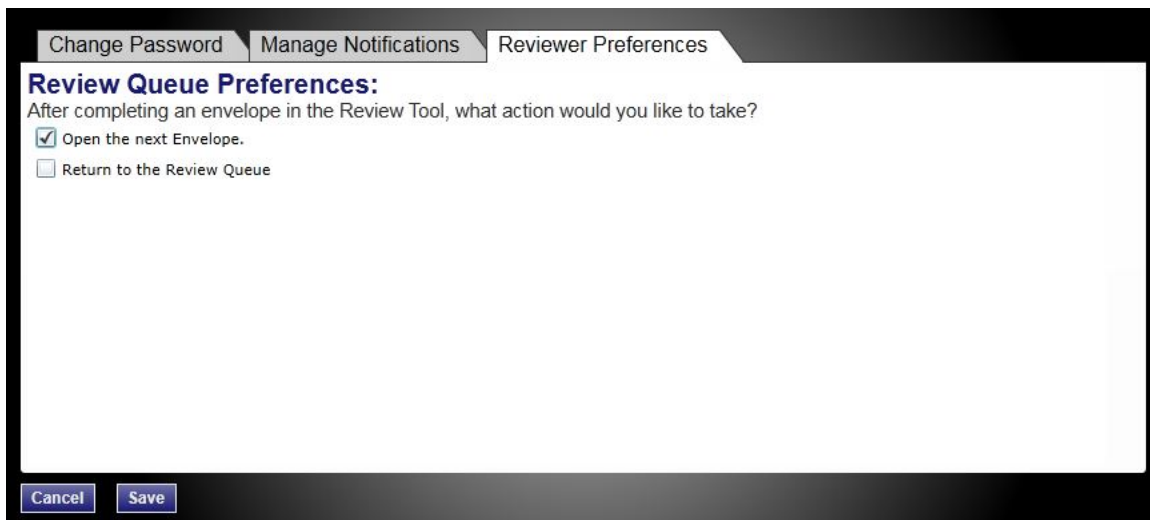
1. Click **MY ACCOUNT**.

The *Change Password* page is displayed.

2. Click **Reviewer Preferences**.

The *Reviewer Preferences* page is displayed.





The screenshot shows a web interface with three tabs: "Change Password", "Manage Notifications", and "Reviewer Preferences". The "Reviewer Preferences" tab is active. Below the tabs, the section is titled "Review Queue Preferences:". A question follows: "After completing an envelope in the Review Tool, what action would you like to take?". There are two radio button options: "Open the next Envelope." (which is selected) and "Return to the Review Queue". At the bottom of the form are two buttons: "Cancel" and "Save".

**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.

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

**i 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.

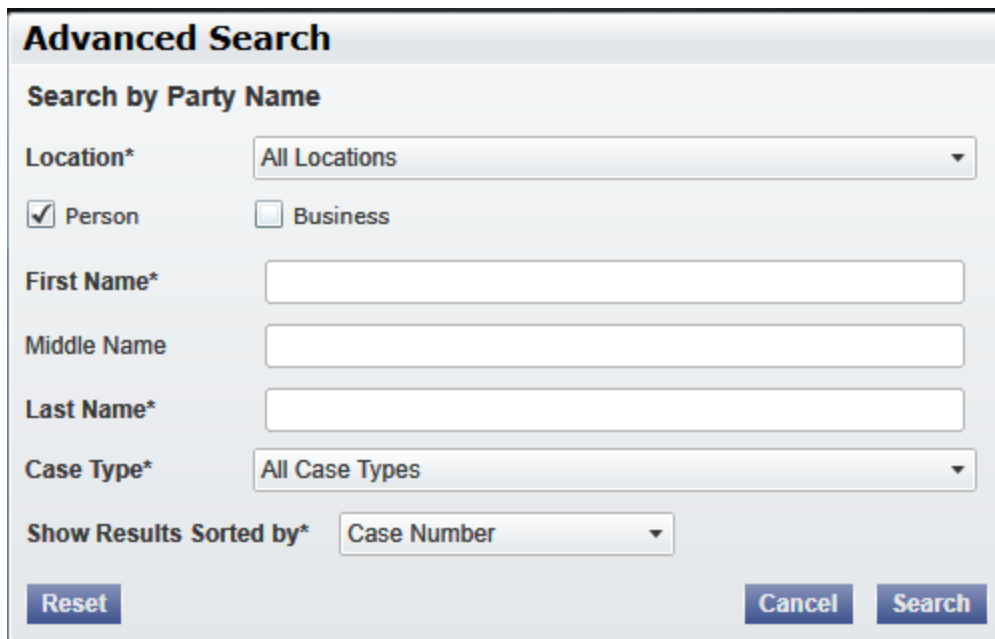
The image shows a screenshot of the 'Advanced Search' dialog box. The title bar says 'Advanced Search'. Below the title bar, there's a section 'Search by Party Name'. Under this section, there are several fields: 'Location\*' with a dropdown menu showing 'All Locations'; a checkbox for 'Person' which is checked, and a checkbox for 'Business' which is unchecked; 'First Name\*' with a text input field; 'Middle Name' with a text input field; 'Last Name\*' with a text input field; 'Case Type\*' with a dropdown menu showing 'All Case Types'; and 'Show Results Sorted by\*' with a dropdown menu showing 'Case Number'. At the bottom of the dialog box, there are three buttons: 'Reset', 'Cancel', and 'Search'.

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**.

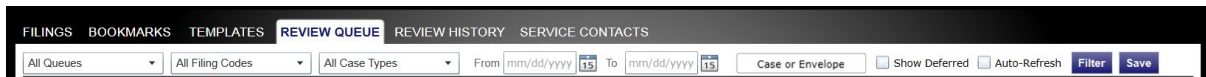


Figure 8.2 – Review Queue Page Filter Options

- 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.

**FILINGS BOOKMARKS TEMPLATES REVIEW QUEUE REVIEW HISTORY SERVICE**

From Date   To Date   ☐ Auto-Refresh



Envelope # 282 filed October 02, 2012 at 2:50 PM by System System on behalf of The Hammer

Status	Filing Code	Case Type	Filing Descript	Queue	Reviewer
Under F	ACCEPTANCE	Administrative: .	a	Default	

**Envelope # 304 - a**  



Envelope # 304 filed October 17, 2012 at 2:28 PM by System System on behalf of The Hammer

Status	Filing Code	Case Type	Filing Descript	Queue	Reviewer
Under F	ADDENDUM	Name Change	aa	Default	System System

**Case # D-1329-CV-2012-00032 - In The Matter Of Th**  



Envelope # 306 filed October 17, 2012 at 2:51 PM by System System on behalf of The Hammer

Status	Filing Code	Case Type	Filing Descript	Queue	Reviewer
Under F	ADJUDICATED	Name Change	a	Errored filings	

**Case # D-1329-CV-2012-00032 - In The Matter Of Th**  

Envelope # 307 filed October 17, 2012 at 3:38 PM by System System on behalf of The Hammer

Status	Filing Code	Case Type	Filing Descript	Queue	Reviewer
Submitt	ACCEPTANCE	Name Change	asdf	Default	


**Envelope # 310 - a**  

Envelope # 310 filed October 18, 2012 at 10:55 AM by System System on behalf of The Hammer

Status	Filing Code	Case Type	Filing Descript	Queue	Reviewer
Under F	ACCEPTANCE	Name Change	a	Default	System System

◀◀ 1 of 12 ▶▶

Figure 8.3 – Review Queue Page

- 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.

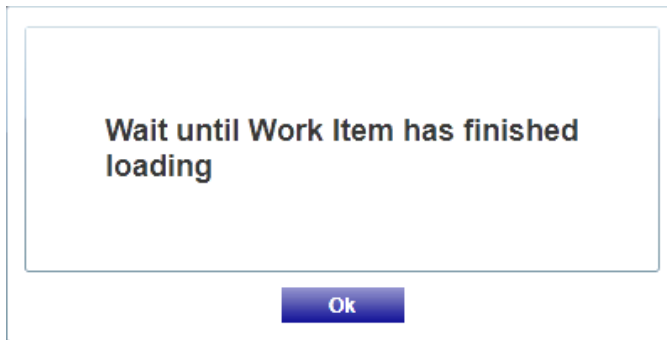



Figure 8.4 – Work Item Notification

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.

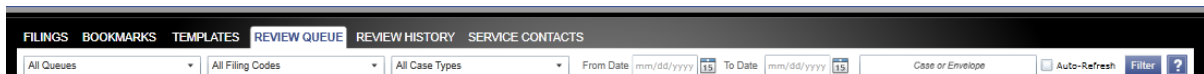


Figure 8.5 – Filter Option on the Review Queue Page

**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  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.

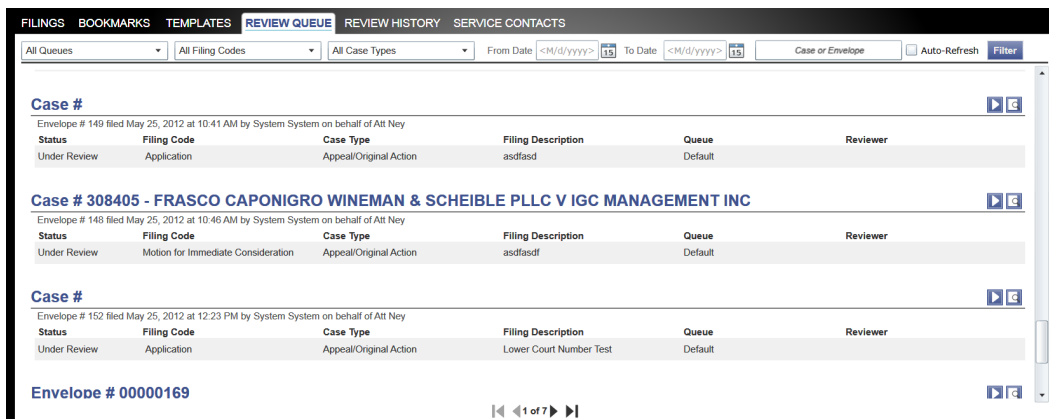



Figure 8.7 – Review Queue Page

- 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:

- Click **Review Queue**.
- Select the filters from the drop-down lists at the top of the page.
- 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.

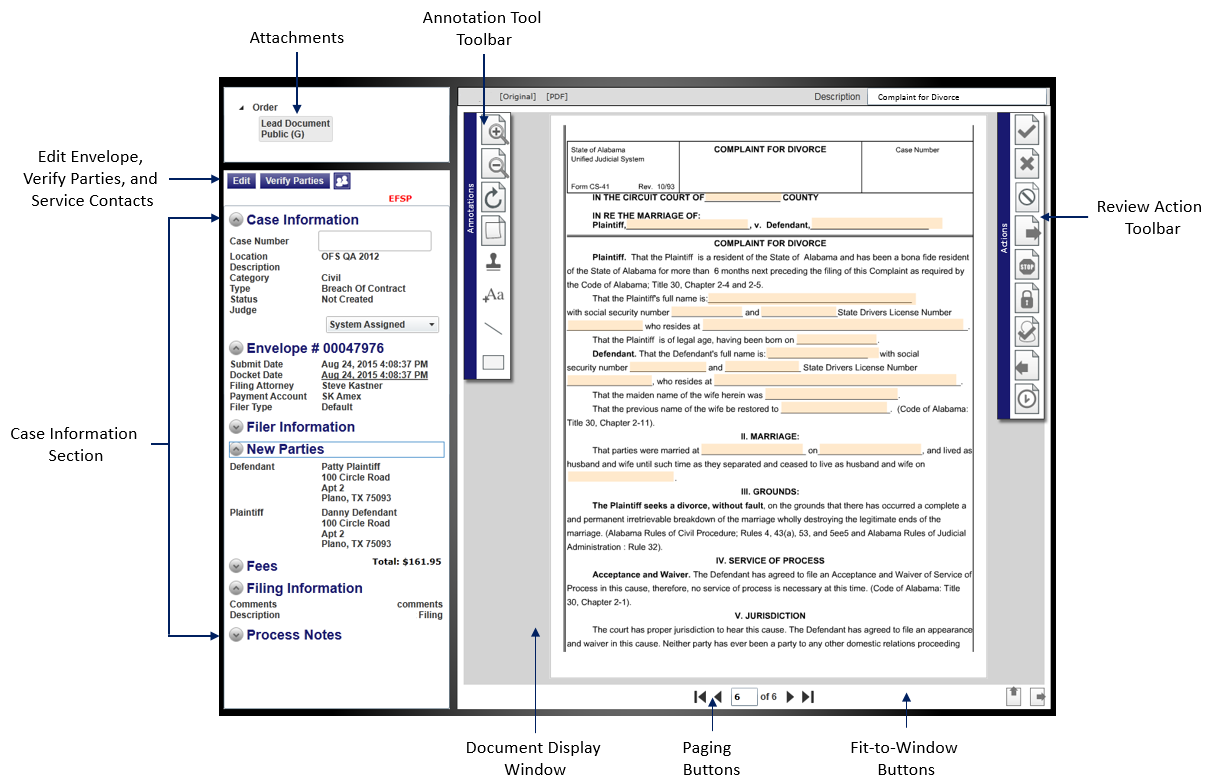


Figure 9.1 – Review Queue User Interface

## 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

- ◆ Attachments Section
- ◆ Edit Envelope Information
- ◆ Verify Party Information
- ◆ Viewing Service Contacts History
- ◆ Review Case Information
- ◆ Review Envelope Information
- ◆ Review Filer Information
- ◆ Review Original Parties
- ◆ Filing Fees
- ◆ Maximum Fee Amount Set by Filer
- ◆ Review Filer Comments
- ◆ Review Filing Information
- ◆ Review Process Notes

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.

▲ ✓ Action  
 Lead Document (Lead)

Edit Verify Parties Waiver

Case # CC-15-1597

Location OFS QA 2012  
 Description  
 Category Civil  
 Type Appeal  
 Status Filed  
 Filed Date 4/22/2015 12:00:00 AM  
 Judge

Envelope # 00000035

Submit Date Apr 24, 2015 4:58:53 PM  
 Docket Date Apr 24, 2015 4:58:53 PM  
 Filing Attorney Steve Kastner  
 Payment Account SK Waiver

Filer Information

Filed by Samantha Washington  
 Filer Address 1328 Courts Way  
 Canton, Texas 75024  
 Filer Phone 555-222-1112  
 Filer Email [swashington@courts.org](mailto:swashington@courts.org)  
 Firm Name Law Firms of Texas

Original Parties

Fees Total: \$0.00

Responsible Party	
Payment Service Fee	\$0.00
Total Court Case Fees	\$0.00
Total Court Filing Fees	\$0.00
Total Filing & E-File Fee	\$0.00
Grand Total	\$0.00

Filing Information

Process Notes

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.

▲ Application  
 Lead Document (Lead)

▲ Application - Guilty Plea  
 Lead Document (Lead)

▲ Assessed Cost  
 Lead Document (Lead)

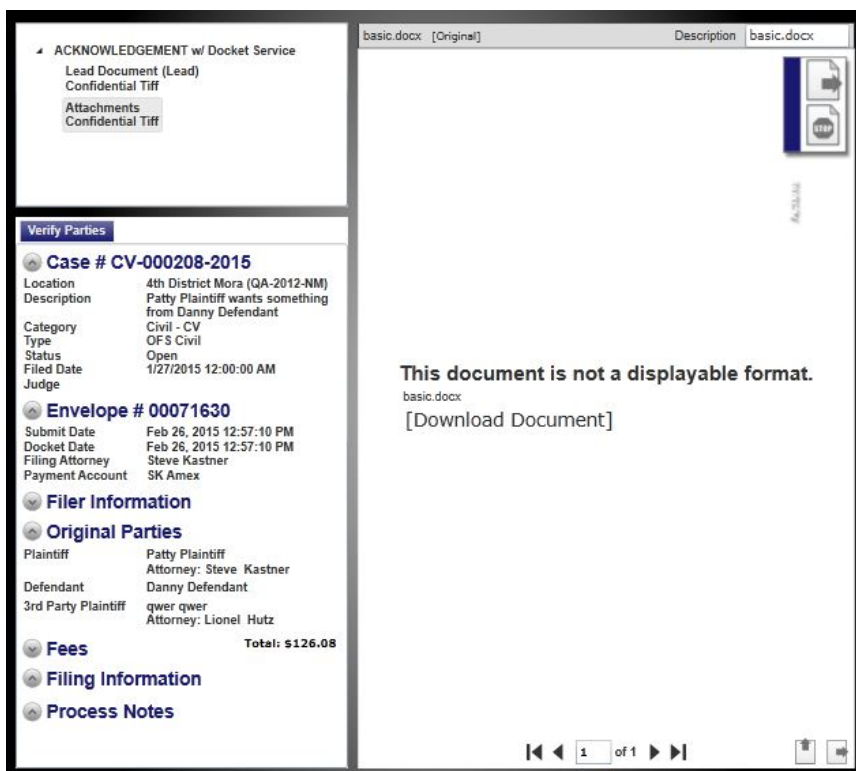
Figure 10.2 – Attachments Section

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.

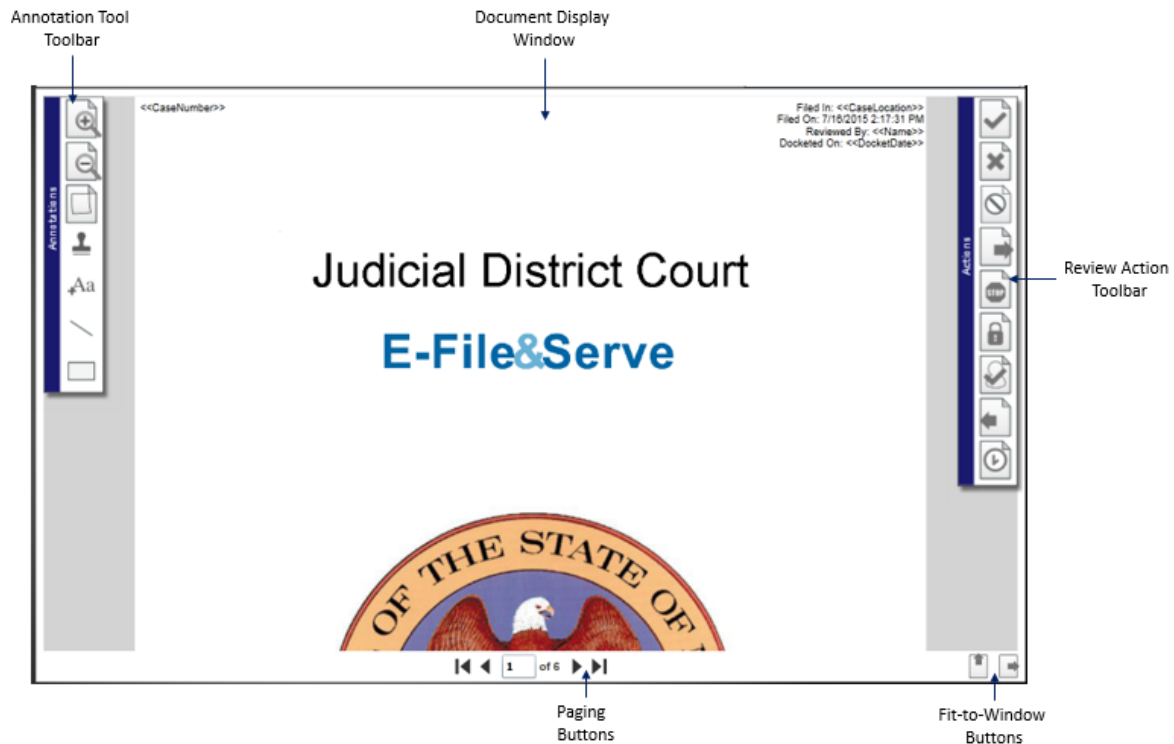


Figure 10.4 – Document Display Window

## Edit Envelope Information

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

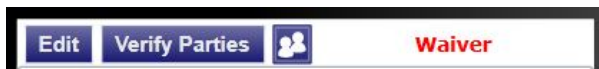



Figure 10.5 – Edit and Verify Parties Toolbar

On subsequent filings, you can edit the party information by clicking **Edit**. 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  to access the *Case Information* page.



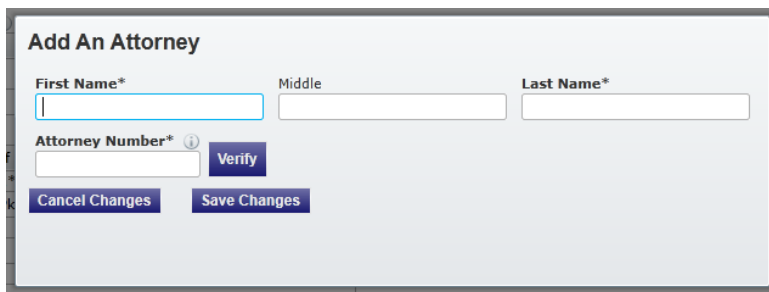
5. Click  to access the *Edit Envelope* page.

Figure 10.6 – Edit Envelope Page

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

The *Add An Attorney* dialog box opens.

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



**Add An Attorney**

First Name\*  Middle  Last Name\*

Attorney Number\*

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.

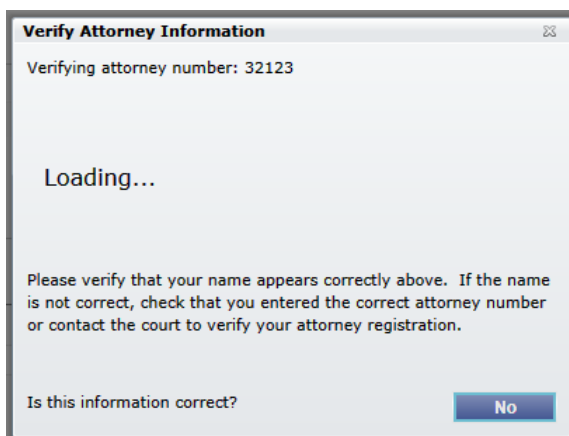


**Attorney Number\***

Figure 10.8 – Attorney Number Field

9. Click  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.



**Verify Attorney Information**

Verifying attorney number: 32123

Loading...

Please verify that your name appears correctly above. If the name is not correct, check that you entered the correct attorney number or contact the court to verify your attorney registration.

Is this information correct?

Figure 10.9 – Verify Attorney Information Window

**Note:** If the attorney information is incorrect, click  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.

Email Address\*

je@macafee.com

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.

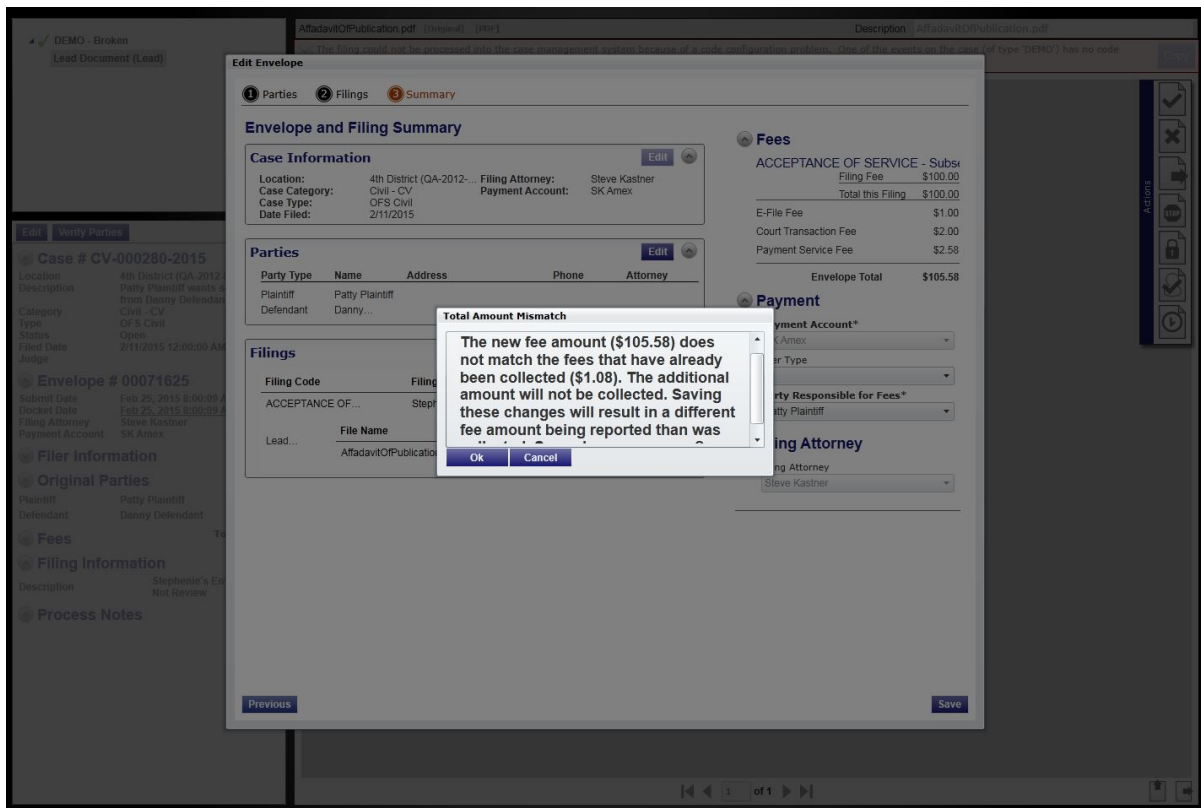


Figure 10.11 – Total Amount Mismatch Error Message

## 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.



Party Type	Name	Filer ID	Verified	Disposition
Appellant	Sue Young		No	
Defendent	Mark Jones		No	

**Filer-Entered Party Information**

First Name: Sue

Middle Name:

Last Name: Young

Address:

City, State, Zip:

Phone:

\*If you choose to use the information above, the Filer ID entered by the filer will NOT be used. The party information fields will be editable when the User Filer Info button is selected.

**Use Filer Info**

**Case Management System Party Information**

Party Lookup by Filer ID:  **Search**

No filer id

First Name:

Middle Name:

Last Name:

Address:

City, State, Zip:

Phone:

\*If you choose to use the information above, the party data that exists in the Case Management System will be used.

**Use CMS Info**

**Cancel** **Save**

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.

**Filer-Entered Party Information**

First Name Sue

Middle Name

Last Name Young

Address

City, State, Zip

Phone

\*If you choose to use the information above, the Filer ID entered by the filer will NOT be used. The party information fields will be editable when the User Filer Info button is selected.

Use Filer Info

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.

**Case Management System Party Information**

Party Lookup by Filer ID  Search

No filer id

First Name

Middle Name

Last Name

Address

City, State, Zip

Phone

\*If you choose to use the information above, the party data that exists in the Case Management System will be used.


Use CMS Info

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:

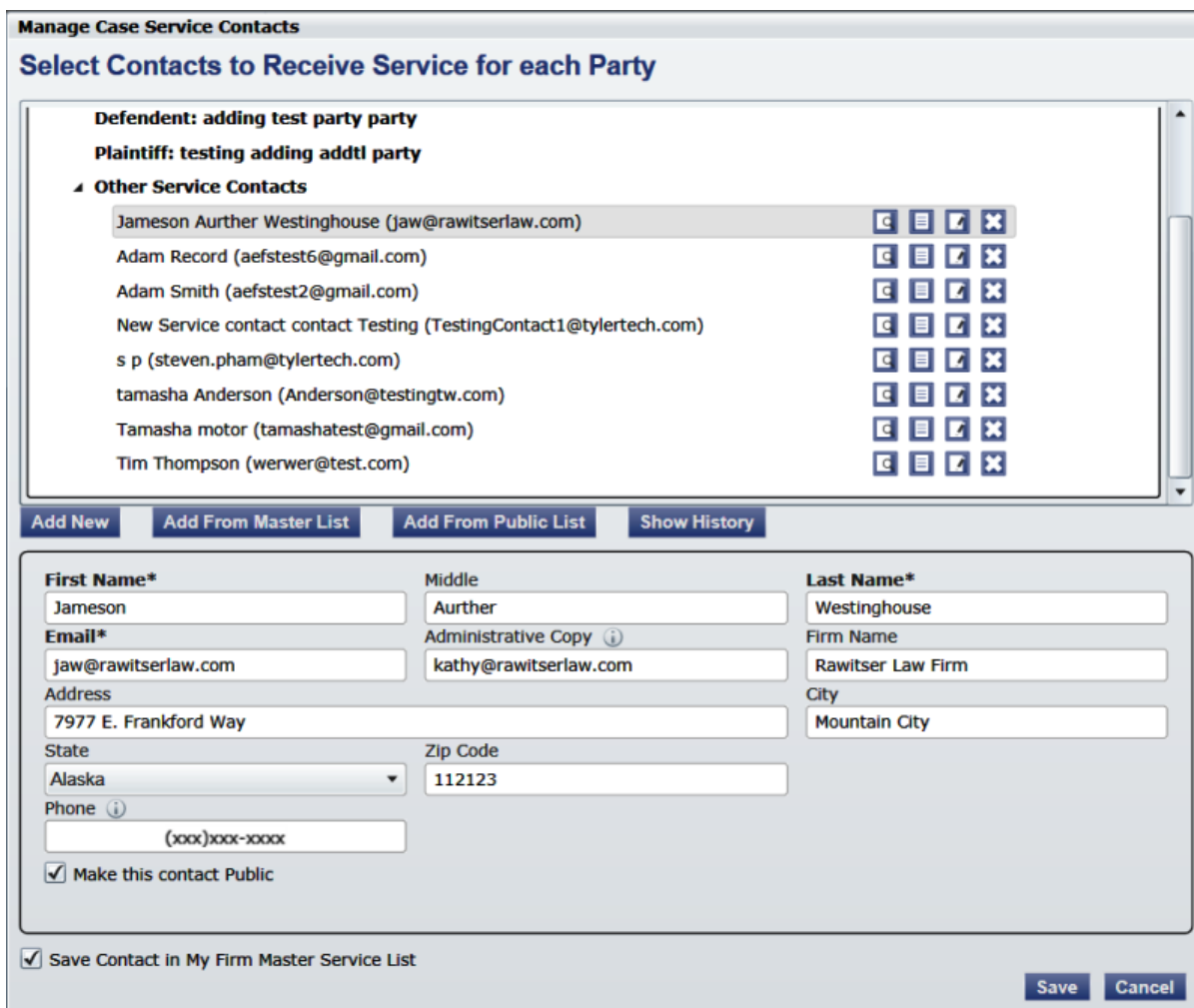
1. Click **WORKSPACE** at the top of the page.  
The *Review Queue* page is displayed.
2. Locate the case for which you want to view a service contact's history.

- Click  for the case that you want to retrieve.

The *Review Queue User Interface* window is displayed.

- Click  to view the service contact information.

The *Manage Case Service Contacts* window is displayed.



































**Manage Case Service Contacts**

**Select Contacts to Receive Service for each Party**

**Defendant:** adding test party party  
**Plaintiff:** testing adding addtl party

**Other Service Contacts**

Jameson Aurther Westinghouse (jaw@rawitserlaw.com)	   
Adam Record (aefstest6@gmail.com)	   
Adam Smith (aefstest2@gmail.com)	   
New Service contact contact Testing (TestingContact1@tylertech.com)	   
s p (steven.pham@tylertech.com)	   
tamasha Anderson (Anderson@testingt看.com)	   
Tamasha motor (tamashatest@gmail.com)	   
Tim Thompson (werwer@test.com)	   

**Add New** **Add From Master List** **Add From Public List** **Show History**

**First Name\*** Jameson **Middle** Aurther **Last Name\*** Westinghouse

**Email\*** jaw@rawitserlaw.com **Administrative Copy** kathy@rawitserlaw.com **Firm Name** Rawitser Law Firm

**Address** 7977 E. Frankford Way **City** Mountain City

**State** Alaska **Zip Code** 112123

**Phone** (xxx)xxx-xxxx

☒ Make this contact Public

☒ Save Contact in My Firm Master Service List

**Save** **Cancel**

**Figure 10.15 – Manage Case Service Contacts Window**

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

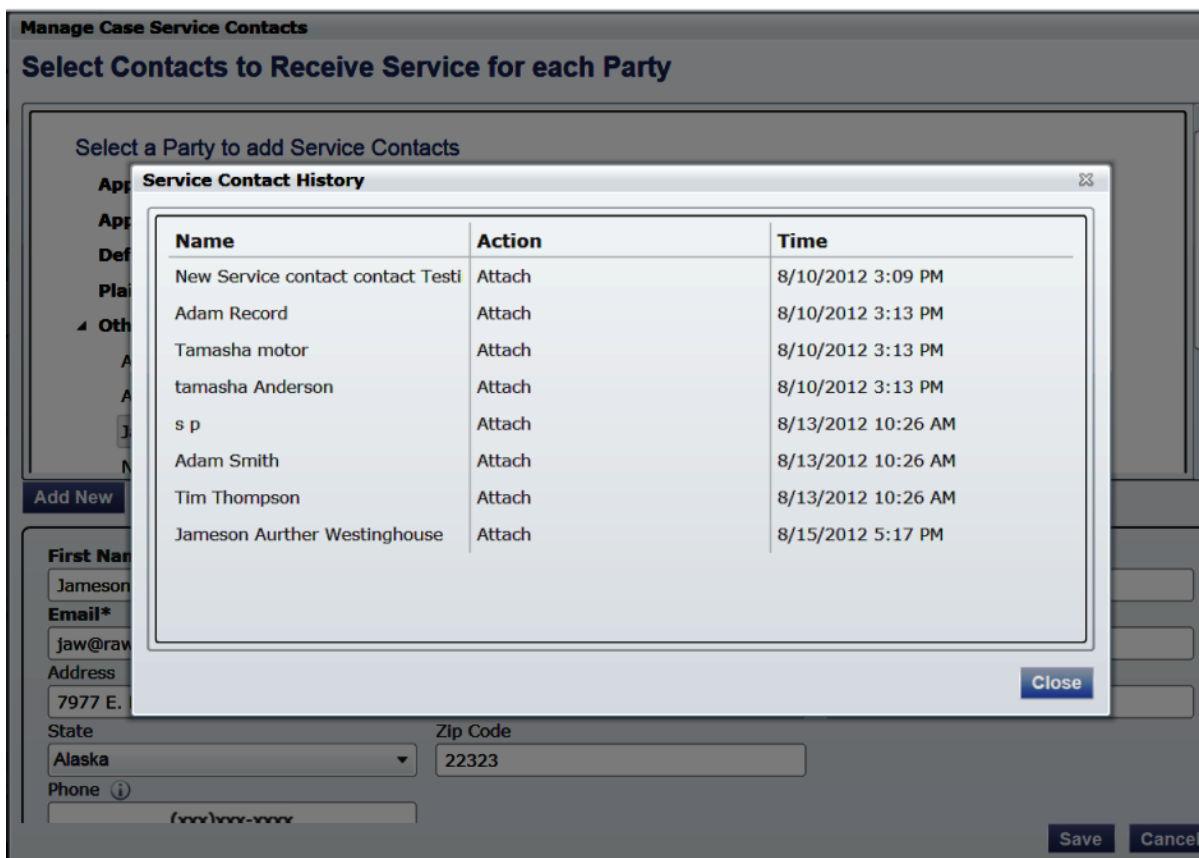


Figure 10.16 – Service Contact History Window

- 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.

Action  
 Lead Document (Lead)

Edit Verify Parties Waiver

**Case # CC-15-1597**

Location: OFS QA 2012  
 Description:  
 Category: Civil  
 Type: Appeal  
 Status: Filed  
 Filed Date: 4/22/2015 12:00:00 AM  
 Judge:

**Envelope # 00000035**

Submit Date: Apr 24, 2015 4:58:53 PM  
 Docket Date: Apr 24, 2015 4:58:53 PM  
 Filing Attorney: Steve Kastner  
 Payment Account: SK Waiver

**Filer Information**

Filed by: Samantha Washington  
 Filer Address: 1328 Courts Way  
 Canton, Texas 75024  
 Filer Phone: 555-222-1112  
 Filer Email: [swashington@courts.org](mailto:swashington@courts.org)  
 Firm Name: Law Firms of Texas

**Original Parties**

**Fees** Total: \$0.00

Responsible Party	
Payment Service Fee	\$0.00
Total Court Case Fees	\$0.00
Total Court Filing Fees	\$0.00
Total Filing & E-File Fee	\$0.00
Grand Total	\$0.00

**Filing Information**

**Process Notes**

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:

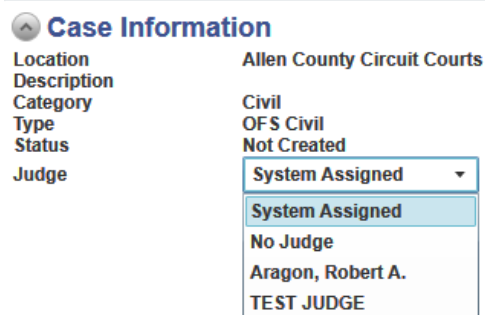
1. Click **REVIEW QUEUE**.

FILINGS BOOKMARKS TEMPLATES **REVIEW QUEUE** REVIEW HISTORY SERVICE CONTACTS

All Queues All Filing Codes All Case Types From Date mm/dd/yyyy To Date mm/dd/yyyy Case or Envelope Auto-Refresh Filter ?

Figure 10.18 – Review Queue Page

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



**Case Information**

Location	Allen County Circuit Courts
Description	
Category	Civil
Type	OFS Civil
Status	Not Created
Judge	<div>System Assigned ▾</div> <div>System Assigned</div> <div>No Judge</div> <div>Aragon, Robert A.</div> <div>TEST JUDGE</div>



Figure 10.19 – Judge Selection Drop-down List

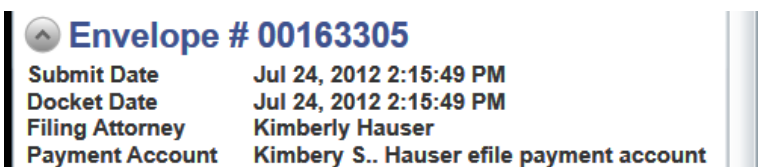
This action assigns the selected judge to the case.

## 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.



**Envelope # 00163305**



Submit Date	Jul 24, 2012 2:15:49 PM
Docket Date	Jul 24, 2012 2:15:49 PM
Filing Attorney	Kimberly Hauser
Payment Account	Kimberly S.. Hauser efile payment account

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.

**Filer Information**

Filed by: Kimberly Hauser  
 Filer Address: 2539 Country Village Court  
 Ann Arbor Michigan 48103  
 Filer Phone: 7349944750  
 Filer Email: [khauser3137@yahoo.com](mailto:khauser3137@yahoo.com)  
 Firm Name: Individual

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.

**Envelope # 00004537**

Submit Date: May 30, 2012 10:22:33 AM  
 Docket Date: May 30, 2012 10:22:33 AM

5/30/2012 15 10:22:33 AM

Filing Attorney: [blank]  
 Payment Account: [blank]

**Filer Information**

Filed by: [blank]  
 Filer Address: [blank]  
 Filer Phone: [blank]  
 Filer Email: [blank]  
 Firm Name: [blank]

May, 2012						
Su	Mo	Tu	We	Th	Fr	Sa
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

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.

**Filer Information**

Filed by: Kimberly Hauser  
 Filer Address: 2539 Country Village Court  
 Ann Arbor Michigan 48103  
 Filer Phone: 7349944750  
 Filer Email: [khauser3137@yahoo.com](mailto:khauser3137@yahoo.com)  
 Firm Name: Individual

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.

 <b>Original Parties</b>	
Plaintiff	Chevy Chase 19 Wisconsin Circle Chevy Chase, Maryland 20815 Attorney: Chevy Chase
Defendant	William James Murray Sr 23 Sunset Blvd Suite 32 Hollywood, California 78956 Attorney: William James Murray

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.



Fees	
Responsible Party	Kimberly Hauser
Convenience Fee	\$16.00
Total Court Case Fees	\$0.00
Total Court Filing Fees	\$375.00
Total Filing & Service Fee	\$5.00
Grand Total	\$396.00

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.

**Edit Envelope**

1 Case Information 2 Parties 3 Filings 4 Service Contacts 5 Summary

**Enter Filing Details**

Select Filing Code\*  
Acknowledgement ☒ E-File ☐ Service

Filing Description

Reference Number

Optional Services

- Placeholder Service 3
- Placeholder Service 4
- Priority Processing (\$6.00)
- TOGA Decline Error (\$280.00)
- Zero Fee Service (\$0.00)

Add →

← Remove

Selected Optional Services

- Split Fee Service (\$10.00)

Parties Associated

Case Parties

- George Defendant
- Mary Plaintiff

Associate →

← Disassociate

Documents

Lead Document\* Academic\_Calendar\_Fall\_2017.pdf  
195.5 kb  
Description Academic\_Calendar\_Fall\_2017.pdf Security Public (G)

Attachments

Filing Comments

Previous Next

**Fees**

Acknowledgement

Filing Fee	\$0.00
Split Fee Service	\$10.00
Total this Filing	\$10.00

Case Initiation Fee \$0.00

E-File Fee \$1.00

Court Transaction Fee \$1.00

Payment Service Fee \$0.30

**Envelope Total \$12.30**

**Payment**

Payment Account\* chase cc

Fees Not To Exceed \$5.00

Filer Type Default

Party Responsible for Fees\* Mary Plaintiff

**Filing Attorney**

Filing Attorney Thomas Crump

**Procedures / Remedies**

- ☐ Appeal
- ☐ Class Action
- ☐ Garnishment

Damages Sought

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.

**Edit Envelope**

1 Case Information 2 Parties 3 Filings 4 Service Contacts 5 Summary

### Envelope and Filing Summary

#### Case Information

Location: OFS QA 2017  
Case Category: Civil  
Case Type: Negligence  
Date Filed:

Filing Attorney: Thomas Crump  
Payment Account: chase cc

**Edit**

#### Parties

Party Ty	Name	Address	Phone	Email	Date of	SSN	Attorney
Defe...	Geor...						
Plaintiff	Mary...						

**Edit**

#### Filings

Filing Code	Filing Description	Reference Nu	Filing Type
Acknowledgement			EFile

Lead...	File Name	Status	Security
	Academic_Calendar_Fall_2017.pdf	Ok	Public (G)

**Edit**

#### Service Contacts

Name (Email)	Service Type	Mailing Address
<input type="checkbox"/> Defendant: George Defen		
<input type="checkbox"/> Plaintiff: Mary Plaintiff		
<input type="checkbox"/> Other Service Contacts		

**Edit**

#### Parties with no Contacts for eService

Name	Address
George Defendant	
Mary Plaintiff	

**Edit**

#### Fees

Acknowledgement

Filing Fee	\$0.00
Split Fee Service	\$10.00
<b>Total this Filing</b>	<b>\$10.00</b>

Case Initiation Fee \$0.00

Enfil Fee \$1.00

Court Transaction Fee \$1.00

Payment Service Fee \$0.30

**Envelope Total \$12.30**

#### Payment

Payment Account\*  
chase cc

**Fees Not To Exceed**  
\$5.00

Filer Type  
Default

Party Responsible for Fees\*  
Mary Plaintiff

#### Filing Attorney

Filing Attorney  
Thomas Crump

#### Procedures / Remedies

☐ Appeal  
☐ Class Action  
☐ Garnishment

Damages Sought

**Previous** **Save**

Figure 10.27 – Envelope Summary Showing the Maximum Filing Fee Exceeded

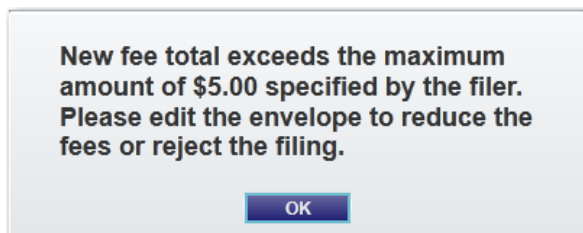




Figure 10.28 – Sample Error Message Displayed on the Summary Page

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.

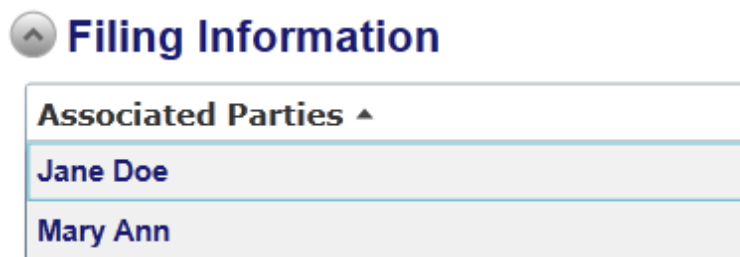




Figure 10.30 – Filing Information Section

## 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.

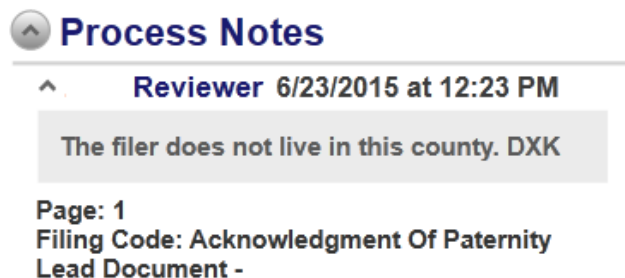


Figure 10.31 – Process Notes Section

**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

- ◆ Zoom In and Out
- ◆ Paging Arrows
- ◆ Fit-to-Window Arrow Buttons

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.

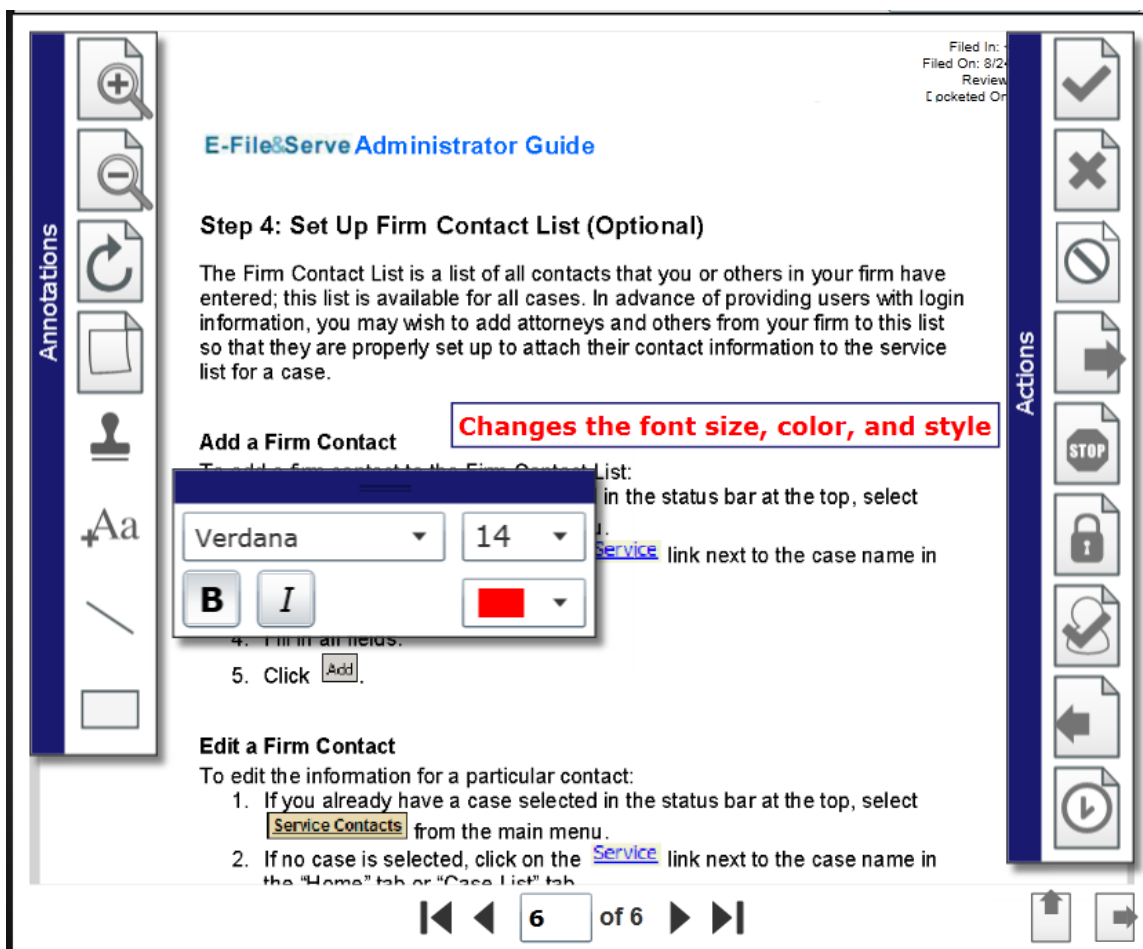





Figure 11.1 – Document Display Window with Annotations

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.

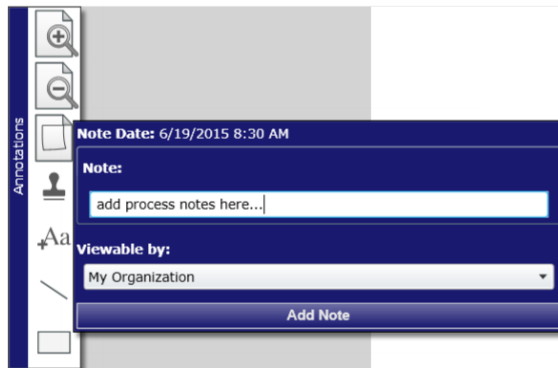



Figure 11.2 – Adding Process Notes

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.

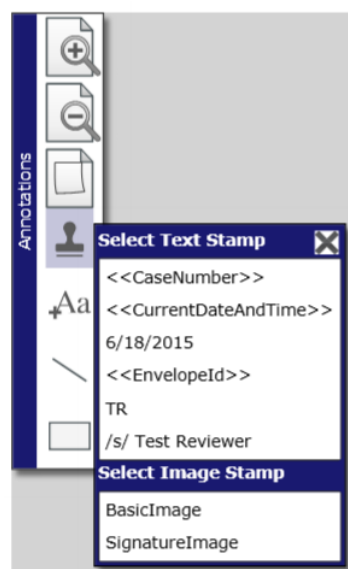



Figure 11.3 – Text and Image Stamps

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.

**i 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.

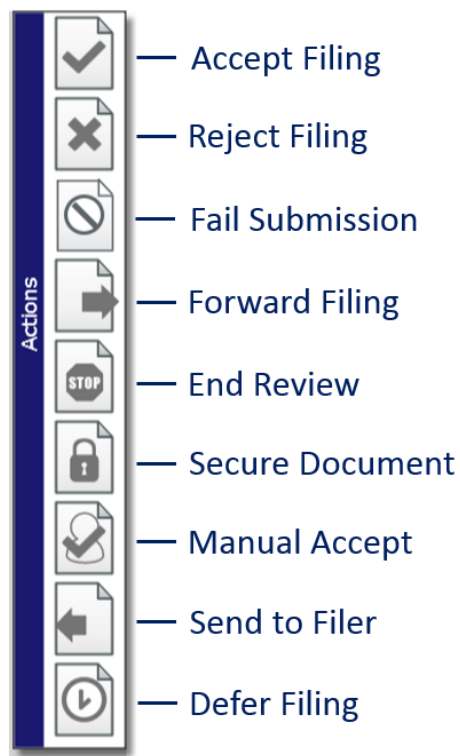



Figure 12.1 – Review Actions Toolbar

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

## Accept Filing

Click  to accept the filing.

**i 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.

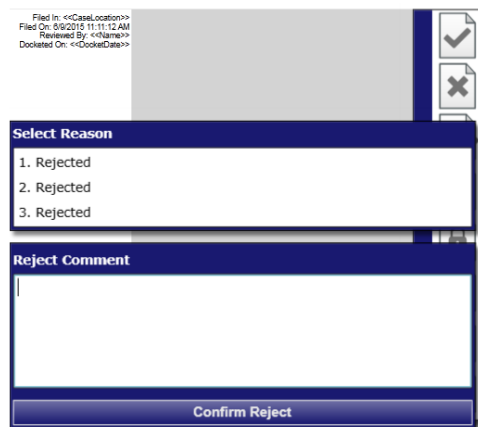


Figure 12.3 – Reject the Filing Icon, Select Reason Dialog Box, and Reject Comment Dialog Box

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.

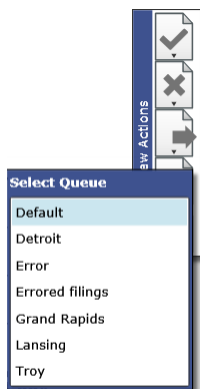
When a filer's submission fails, the reviewer can send a notification to the filer that the submission failed to allow resubmission of the filing.

**i 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.

**i Note:** The color changes when the icon is selected.

The *Select Document Type* dialog box opens.

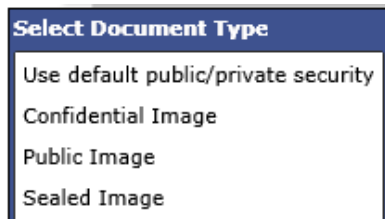



Figure 12.5 – Select Document Type Dialog Box

**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.

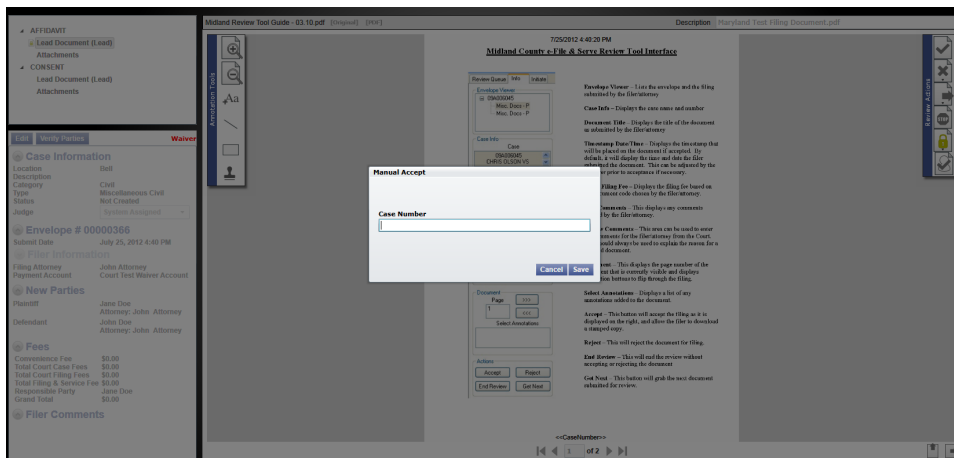



Figure 12.6 – Manual Accept Dialog Box

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.

The screenshot displays a web-based document viewer for a PDF titled "AffidavitOfPublication.pdf". At the top, a yellow banner contains the message: "This Envelope has been copied from an Envelope which contains at least one Rejected Filing." To the right of this banner is a button labeled "Copy Docket Date". Below the banner, the PDF form is visible, featuring a section for "INSTRUCTIONS" and a "PUBLISHER" section with fields for "County of", "Date", and "Signature of Publisher". The form also includes a section for "Notary Public" with fields for "County of", "On the \_\_\_ day of \_\_\_, 20\_\_\_", and "before me by \_\_\_". The interface includes a sidebar on the left with "Annotations" tools and a sidebar on the right with "Actions" tools. At the bottom, a navigation bar shows "1 of 1" and navigation arrows.

**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**.

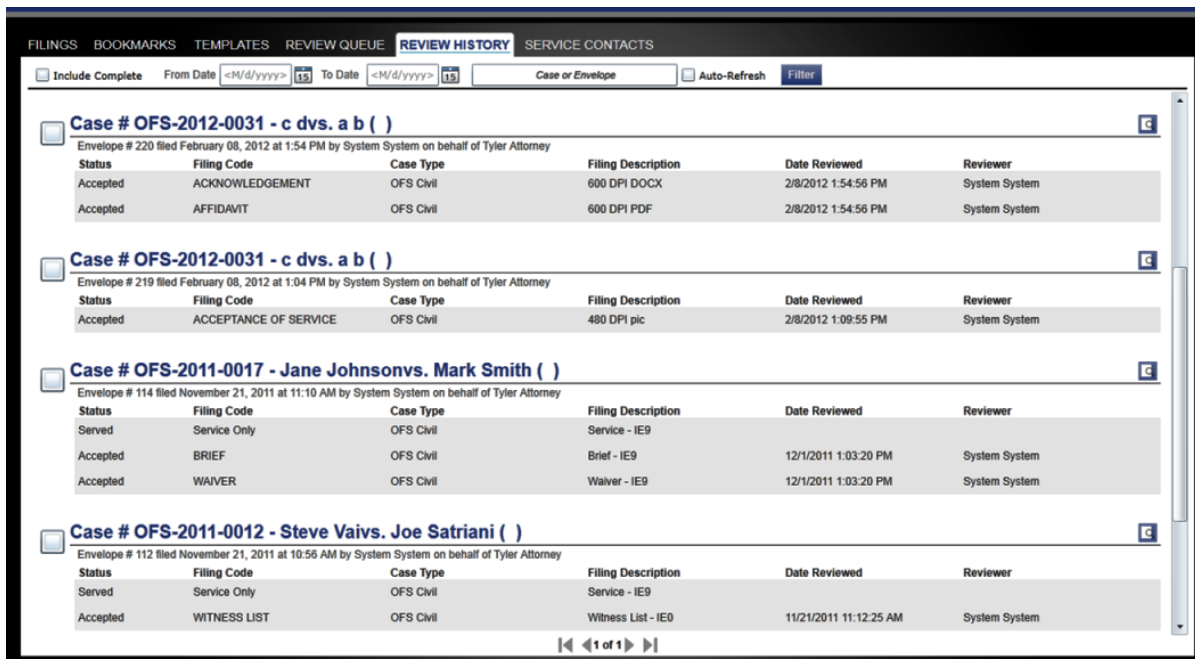
6. Click .

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.

**i 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.



FILINGS BOOKMARKS TEMPLATES REVIEW QUEUE <b>REVIEW HISTORY</b> SERVICE CONTACTS						
<input type="checkbox"/> Include Complete    From Date <M/d/yyyy> 12/15 To Date <M/d/yyyy> 12/15    Case or Envelope <input type="checkbox"/> Auto-Refresh    Filter						
<b>Case # OFS-2012-0031 - c dvs. a b ( )</b>						
Envelope # 220 filed February 08, 2012 at 1:54 PM by System System on behalf of Tyler Attorney						
Status	Filing Code	Case Type	Filing Description	Date Reviewed	Reviewer	
Accepted	ACKNOWLEDGEMENT	OFS Civil	600 DPI DOCX	2/8/2012 1:54:56 PM	System System	
Accepted	AFFIDAVIT	OFS Civil	600 DPI PDF	2/8/2012 1:54:56 PM	System System	
<b>Case # OFS-2012-0031 - c dvs. a b ( )</b>						
Envelope # 219 filed February 08, 2012 at 1:04 PM by System System on behalf of Tyler Attorney						
Status	Filing Code	Case Type	Filing Description	Date Reviewed	Reviewer	
Accepted	ACCEPTANCE OF SERVICE	OFS Civil	480 DPI pic	2/8/2012 1:09:55 PM	System System	
<b>Case # OFS-2011-0017 - Jane Johnsonvs. Mark Smith ( )</b>						
Envelope # 114 filed November 21, 2011 at 11:10 AM by System System on behalf of Tyler Attorney						
Status	Filing Code	Case Type	Filing Description	Date Reviewed	Reviewer	
Served	Service Only	OFS Civil	Service - IE9			
Accepted	BRIEF	OFS Civil	Brief - IE9	12/1/2011 1:03:20 PM	System System	
Accepted	WAIVER	OFS Civil	Waiver - IE9	12/1/2011 1:03:20 PM	System System	
<b>Case # OFS-2011-0012 - Steve Vaivs. Joe Satriani ( )</b>						
Envelope # 112 filed November 21, 2011 at 10:56 AM by System System on behalf of Tyler Attorney						
Status	Filing Code	Case Type	Filing Description	Date Reviewed	Reviewer	
Served	Service Only	OFS Civil	Service - IE9			
Accepted	WITNESS LIST	OFS Civil	Witness List - IE0	11/21/2011 11:12:25 AM	System System	

Figure 13.1 – Review History Page

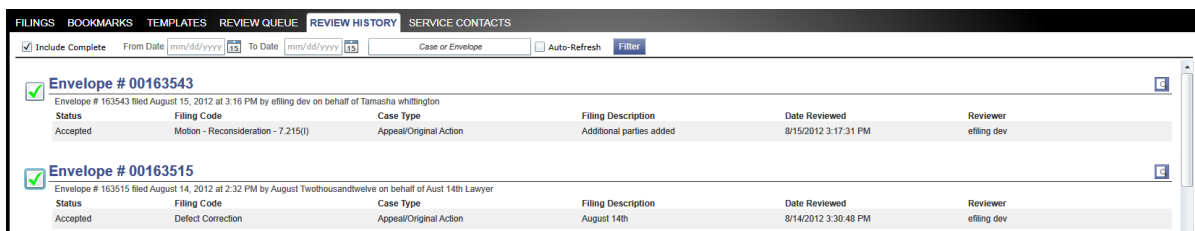
## Accessing the Review History

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.



FILINGS BOOKMARKS TEMPLATES REVIEW QUEUE <b>REVIEW HISTORY</b> SERVICE CONTACTS						
<input checked="" type="checkbox"/> Include Complete    From Date mm/dd/yyyy 12/15 To Date mm/dd/yyyy 12/15    Case or Envelope <input type="checkbox"/> Auto-Refresh    Filter						
<input checked="" type="checkbox"/>	<b>Envelope # 00163543</b>					
Envelope # 163543 filed August 15, 2012 at 3:16 PM by effing dev on behalf of Tamasha whittington						
Status	Filing Code	Case Type	Filing Description	Date Reviewed	Reviewer	
Accepted	Motion - Reconsideration - 7.215(i)	Appeal/Original Action	Additional parties added	8/15/2012 3:17:31 PM	effing dev	
<input checked="" type="checkbox"/>	<b>Envelope # 00163515</b>					
Envelope # 163515 filed August 14, 2012 at 2:32 PM by August Twotwoandtwelve on behalf of Aust 14th Lawyer						
Status	Filing Code	Case Type	Filing Description	Date Reviewed	Reviewer	
Accepted	Defect Correction	Appeal/Original Action	August 14th	8/14/2012 3:30:48 PM	effing dev	

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 **Filter**.

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

# 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 <a href="#">Support Chat</a> .
Email	<a href="mailto:support@efiletxas.gov">support@efiletxas.gov</a>
Telephone	855.839.3453
GoTo Assist (Support)	Support may ask to assist you by sharing your screen using <a href="#">GoToAssist</a> .