

PC JIMS
COURTS
INBOX

EFILING & OTHER INBOX
FUNCTIONS

(FOR JUDGES)

This documentation is for PC JIMS version 1.42.35 and PC JIMS Imaging version 2.02.196.

Revised: 10/2/2017

- Export a Document section was added on page 13.

Revised: 10/12/2017

- Efiling a Document to Your Clerk section was added on page 14.

Revised: 04/01/2018

- Changes were made to PC JIMS to allow judges to add text boxes and strikeouts to proposed orders. Instructions for adding such annotations are now described on page 11.
- In light of the changes that now allow judges to add other annotations to efiled proposed orders, all prior pages that indicated that such changes were not allowed were updated as well.
- Page 14 was modified to update the names of the buttons in the Document Review screen.
- Page 18 and 19 were modified to explain the process by which a judge can efile their own document and do a ruling and record sheet entry on it before the clerk processes it.

Revised: 09/24/2018

- Changes were made on page 15 to clarify the Reject and Deny options, which once were accomplished using the same button, but were later changed to be accomplished using different buttons.

Please make sure your judges have a copy of this documentation for their own reference. A current version can always be found at <http://courtsupport.judici.com/6400>.

THE JUDGE'S SIDE OF EFILING

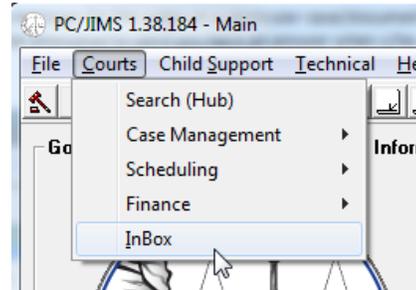
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THE JUDGE'S SIDE OF THINGS: THE INBOX

There are two types of documents that can be sent to judges. The first, which falls under a header of Submit for Signature in your Inbox, is a document that originates in the circuit clerk's office. Circuit clerks can set up custom documents, such as warrants or writs, create them for a particular case, and send the document to the judge to be signed. The second, falling under a header of Submit Filing, originates from the outside world. These are electronically filed documents that have been submitted to the clerk. The clerk can review the filing, and assign it to a judge for review. Examples of this are motions and proposed orders that are separate documents, but electronically filed together by the attorney. When the filing comes in, the clerk will file the motion, and assign the case to the judge. Both documents will then go to the judge's inbox. The judge reviews them, decides whether to grant or deny the motion. To grant, they apply their digital signature and click the Accept button. To deny, they click the Reject button. That filing is then sent back to the circuit clerk who will then import the order into the case file if it was granted, or do something else if it was denied.

That's just a brief summary of what you as the judge might be doing in the PC JIMS Inbox. Since you're new to the screen, let's start by setting up your Inbox. To get to your Inbox sign into PC JIMS and navigate the menus to Courts/Inbox.



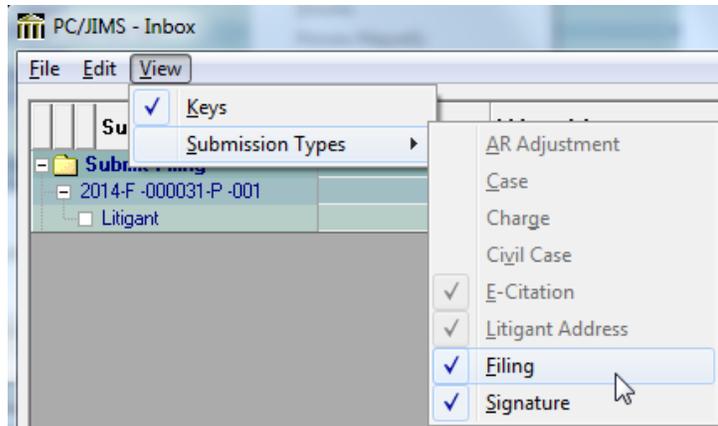
SETTING UP YOUR INBOX PREFERENCES

Preferences are always left up to the individual user, as each user might have different preferences. Here are the things to look at when you are setting your Inbox up.

THE VIEW MENU

Use the View menu to control what you want to see in your Inbox. Here are your options...

Keys--The Key option on the View menu controls whether or not you want to see the Key, a numeric identifier, that is assigned to each and every filing. In order to keep some separation between items that are



currently in the Judge's court, and those that are in the Circuit Clerk's court, a filing is duplicated when the judge processes it. This allows us to continue showing that filing to the Judge under the Submit for Signature or Submit Filing sections, with a status of Completed/Processed, and also show a new filing in the circuit clerk's inbox with a status of New/None. It isn't anticipated that this duplication would be cause for confusion, especially for judges, since only the filing assigned to the judge will ever be visible to

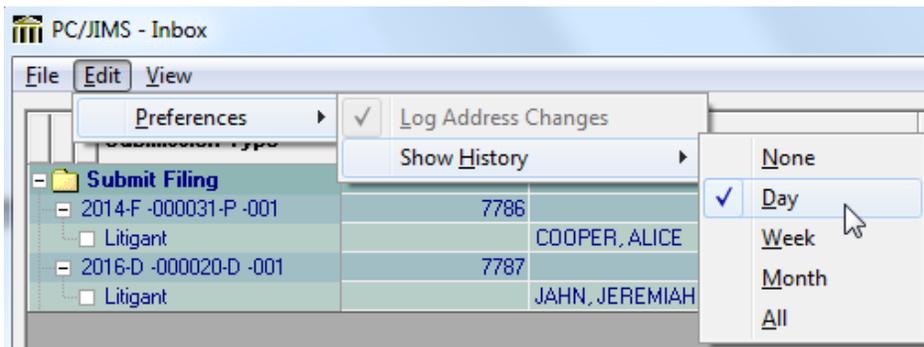
you. So viewing the key is an option that you may want to turn off. If so, just make sure that it is unchecked.

Submission Types--Each type of submission to the Inbox is associated with a folder. And like all folders in the grids of PC JIMS, they can be expanded, or collapsed. An expanded folder is one that is showing you its contents, while a collapsed folder will have the + sign to the left--an indicator that you are not seeing the contents of that folder. Because not every user is necessarily going to be responsible for processing all of the various types of incoming data, this submission type option on the View menu allows each user to only expand the folders for the types of inbox submissions that they usually work with. These are set then as the default when the user comes into the Inbox. Since judges only work with two of these types of submissions, these are the only two options that are not greyed out:

Filing--This is where the judge will see electronically filed documents that have been assigned to them for review. Proposed orders, for example, will show up in the Submit Filing area.

Signature--The Submit for Signature submission type is where you will see electronic documents that the **circuit clerk has submitted to a judge for signature**. This is the only type of submission that is initiated by the circuit clerk, and not all circuit clerk's offices will use this feature. Whether they do or not depends upon whether they are the ones responsible for creating documents such as warrants and writs, and whether they use the PC JIMS Document Generator (formerly known as Notice Generation) to do so if they are.

THE EDIT PREFERENCES MENU



The Edit Preferences menu has two options on it:

Log Address Changes--This option is only pertinent to users in the Circuit Clerk's office, and is therefore greyed out for judges.

Show History--This option controls how long you will continue to see completed items after they've been processed. If set at None, cases will simply disappear the moment their status changes to Completed. If you can get used to items disappearing, it's the option that leaves you with only pending items in your inbox. But if the disappearance of inbox items is disconcerting, setting this option to **Day** allows you to continue to see items that you've just processed for the duration of that day. The other options--Week, Month or All--might be used on an occasional basis, to try to find something processed in the last week or month, but most likely you would want to set this back to Day or None after you locate what you're looking for under the other setting. Note that when you search using the tabs at the bottom of the Inbox (the Name field on the General Tab, or the Case Number, Date or Key tabs) this setting is disregarded to provide you the fullest list of matches. This might make switching your Show History preference setting

unnecessary, as when you are looking to find all of the filings for a particular case, you're likely to be using one of those search tabs.

THE INBOX LAYOUT

Submission Type	Key	Litigant(s)	Status	Result	Description
Submit for Signature	7546	FLANAGAN, MICHAEL A	Completed	Accepted	FAILURE TO APPEAR WARRANT

Much of the information in the Inbox is fairly easy to understand. We've already described the Submission Types, and the use of the Key in section above about the View menu. To the right of those two columns in the Inbox, you'll see the litigant name, and the Status and Result of each filing. These two columns are used together to indicate the status and outcome on any given filing. Possible combinations that judges will see are:

- New - None** The status of new Submit for Signature items.
- Under Review - None** The status for electronic filings that have been assigned to a judge.
- Completed - Processed** Filings that the judge has processed.

Description--On Submit for Signature submissions the Description column will contain the description of the document.

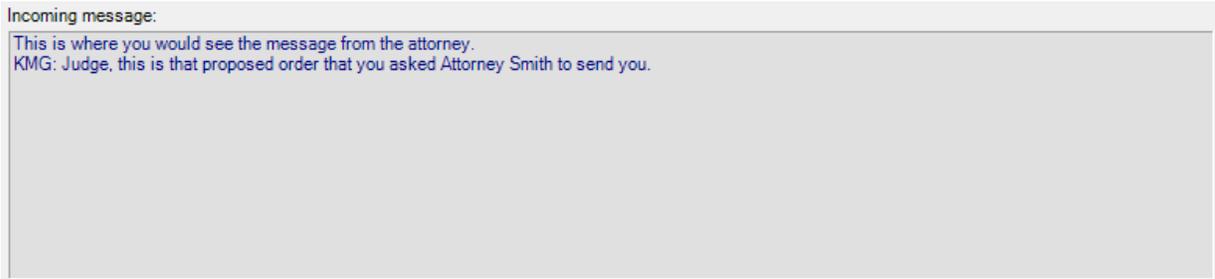
Messages--The Messages column will display messages from the filing attorney, or messages that clerks might send to you when they forward a document to be signed.

Messages
: This is where you would see messages from the filing attorney.
KMG: This is where the clerk's message to the judge will appear.

Since the Message column in the Inbox is narrow, you won't see the whole message in the grid itself. But a simple double-click of that column will display the whole message as well as any other messages that have occurred on that filing.

Messages	Assigned To
This is where the clerk's message to the judge will appear.	
: This is where you would see messages from the filing attorney.	JDG
: This is where you would see messages from the filing attorney. KMG: Judge, this is the motion you were waiting for.	

Also, when you are processing a filing, the complete history of communications is visible in the lower left corner of the Document Review screen. It looks like this:



Below it, a Reply button will appear for you to reply back to the clerk when further communication is needed.



If you don't reply to the clerk's message, it will display more prominently when you try to move forward, making sure that you have seen the message and offering one last opportunity for you to respond. This is just to ensure that these communications are not overlooked.

Still, not all messages need a reply. Click Save to continue, even if you haven't replied.



THE INBOX LAYOUT: OTHER INBOX INFORMATION

Assigned To	Due Date	Reject Message	Submitted	User	Changed	Change User
JDG			05/16/2016 02:33PM	JUDICI	5/16/2016	KMG
			05/16/2016 02:33PM	JDG	5/16/2016	JDG

Assigned To/Due Date--To the right of the Messages column, you'll see columns that show who a filing has been assigned to, as well as any due date that has been supplied when the filing was assigned. On internal submissions (Submit for Signature items) the Assigned To column will reflect the initials of the judge on the case. On external e-filings this column will show the initials of the judge to whom the clerk assigned the filing for review. Note that for counties that have multiple judges participating in this process, judges can limit their Inbox to just those items assigned to their own user ID at the bottom of the screen. When a user ID is provided there, it becomes the default any time the Inbox is opened after that.

Case type: Assigned to:

That being said, in the event that one judge is on vacation, any judge has the ability to use the Assigned to *ALL option, and can sign a document for any case, regardless of whether they are the judge on that case or not.

Reject Message--Separate from other messaging, should the judge need to reject something which has been submitted to them, the message that they supply when they reject the filing will appear here.

Reject Message
These documents are not for the right case.

Submitted Date/Time--This column will always reflect the date and time of the original submission.

User--The User who submitted the filing... E-filings will come in with JUDICI as the user, while filings that have been assigned to you by a clerk will show the initials of the clerk as the user.

Changed Date/Time--The Changed Date/Time will reflect the last date and time of a change to that filing.

Change User--The Change User will tell you which user made the last change to a filing.

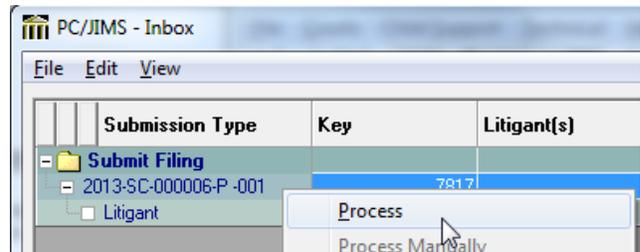
THE JUDGE’S SIDE OF THINGS: PROCESSING SUBMIT FILING ITEMS

Okay, so now that you have your Inbox set up, and you understand how to read the Inbox, let's talk about how you will process the kinds of filings that you will get. There are two types of submissions you'll see. They are:

- ❖ **Submit Filing**--These are documents that have been electronically submitted by attorneys, and need your review and a decision. Proposed orders are a prime example of this type of submission.
- ❖ **Submit for Signature**--These are internal documents that the clerk needs you to sign--warrants perhaps, or possibly a writ. Not all counties will use this option. In some counties the clerks aren't the one to create such documents, so it is possible that in your own county you will never see a Submit for Signature inbox item.

Since Submit for Signatures won't happen in all counties, we'll leave that one for last and start with showing you how to process Submit Filing items. Once you see a filing assigned to you in the Submit Filing area, right-click on the case number. There you will see the Inbox menu. Many of the options on this menu will be greyed out, since they are used solely by circuit clerk staff. But we'll go through each of the options used by judges one by one, starting with the Process option.

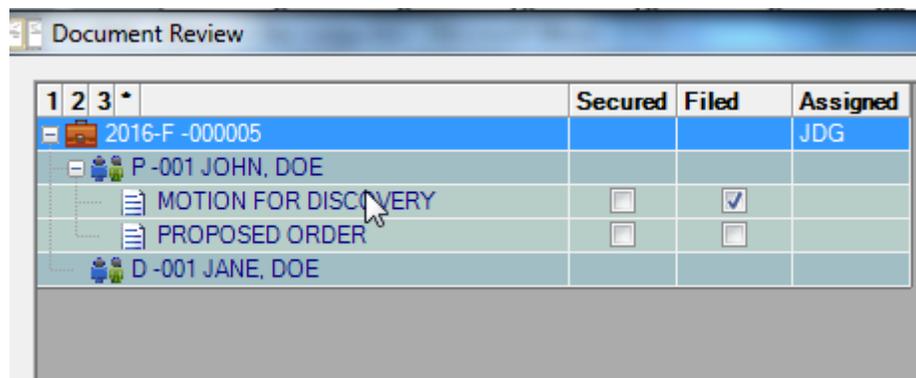
Process--The option you'll use most often, this option will take you into the Document Review screen, where you can review the document, and either accept it or reject it.



REVIEWING THE DOCUMENT

You'll note that the program doesn't default to showing the document first. Instead it is the Record Sheet that shows up on the right side of the Document Review screen. That is an intentional effort to ensure that users don't simply accept filings without looking at them first.

There are two ways to go about seeing the document. One is to click the document name in the Document Review Summary grid. Since that grid is at the core of the activities you need to do, you might find this way to be the easiest, as it will require less back and forth movement of your mouse.



The other way to see the document is to click the tab on the right that shows the document name. In the case below, the Motion tab or the Proposed Order tab.

Record sheet		MOTION FOR DISCOVERY	PROPOSED ORDER		
Record sheet					
Date	Text	Judge	CR	Changed	User
07/11/2016	Family complaint filed by SMITH, SARAH D. \$121.00 bond transferred from case number 2013-NS-000286-P -001. Bond of \$121.00 applied on 07/12/2016.			07/11/2016	KMG
07/12/2016	Motion for Discovery filed by SMITH, SARAH D.			07/12/2016	KMG

Note that what you are seeing is the complete filing. In the Document Review grid you see that the attorney filed a motion and proposed order at the same time. The circuit clerk has filed the motion, as you see from the checkmark in the Filed column. The Order, because it is just proposed at this point, has not been filed. You will probably want to review the motion also, and you can do so just by clicking that document instead.

FILLING IN FORM FIELDS

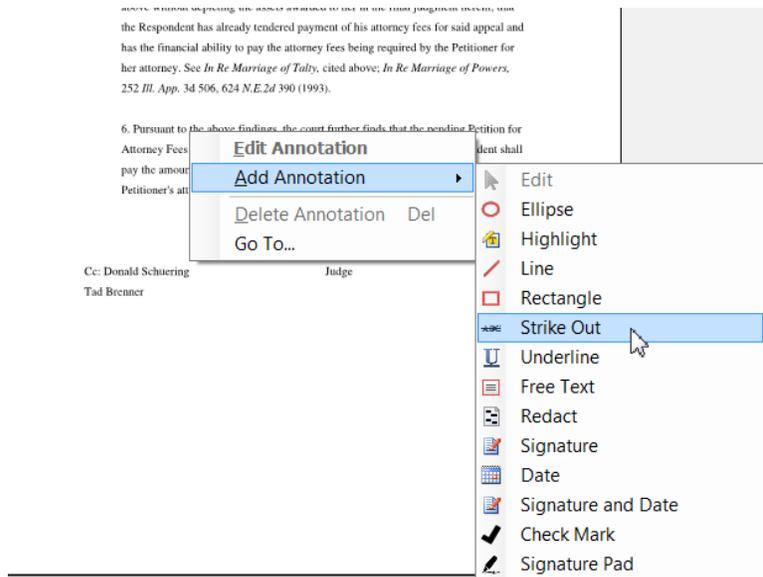
If the filer submits a pdf which has fillable form fields, judge users can fill in those fields right in the Document Review screen of the Inbox viewer. Once a form is accepted into the official court record, form fields are locked down to prevent changes.

Unfortunately, court-supplied data elements such as hearing dates and check boxes on the [standardized Illinois forms](#) were not made fillable. So that leaves implementation of such forms to individual courts/circuits. See support.goodinassociates.com/870 for guidance on how to do this.

ADDING OTHER ANNOTATIONS TO A DOCUMENT

The Supreme Court’s [Electronic Filing Standards and Principles](#), says on page 7, “Any electronic document submitted for e-filing must be secure from alteration, destruction or corruption.” This rule, taken word for word would mean that proposed orders which are submitted for e-filing could not be modified by a judge prior to signing and making a ruling. We held to that rule for quite a while, and judges were informed that the only way to modify a proposed order would be to export the document, modify it outside of the program, and efile the edited version to the clerk. This wasn’t easy or practical, but it was in keeping with the rule, which seemed clearly stated. We later learned that the EFM procured by the Supreme Court allows judges to modify proposed orders using annotations that can strike-out language and text boxes that can be used to add language. These capabilities HAD been in PC JIMS Imaging before, but had been disabled based on our

understanding of the rule. However, seeing that judges are allowed to use such annotations elsewhere, we restored our complete list of annotations for judges to make such modifications from within PC JIMS. To see the complete annotation menu, right-click on the document and navigate to Add Annotation.



These annotations are fairly straight-forward and simple to use. Choose the annotation you want to use and click on the document where you want to place it. Drag your mouse to accomplish tasks just as ellipses, highlighting, creating lines, rectangles or text boxes.

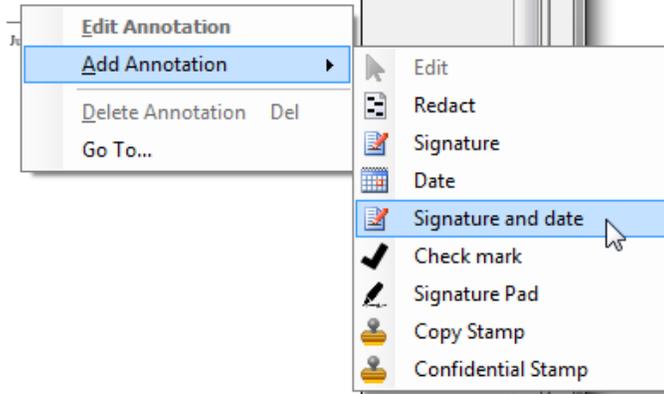
Judge’s annotations cannot be edited or removed after import into Imaging.

APPLYING YOUR SIGNATURE

Once you are actually reviewing the document itself, if you are granting the order, you'll need to sign it. Right-click on the place where you want to affix your signature, and navigate the menu to Add Annotation/Signature option, or the Signature and Date option. Then click the document where you would like your signature to appear. You'll be presented with a new sign-in screen. This is to ensure that the person applying your signature and filing this document is really you. Sign in using the same user ID and password that you use for PC JIMS.

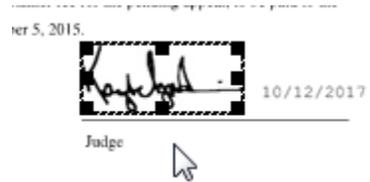
6. Pursuant to the above findings, the court further finds that the pending Petition for Attorney Fees herein has been proven by the evidence; and that the Respondent shall pay the amount of \$7500 as a retainer fee for the pending appeal, to be paid to the Petitioner's attorney by December 5, 2015.

CC: George Synder



You'll see your signature appear on the document. If it doesn't appear exactly on the signature line, you can click the signature and a

box will appear around it. When you see the  icon, you can click that icon and drag the signature box to the place where you want your signature to appear. The same is true for a date annotation or any other annotation you might apply.



Dating your signature

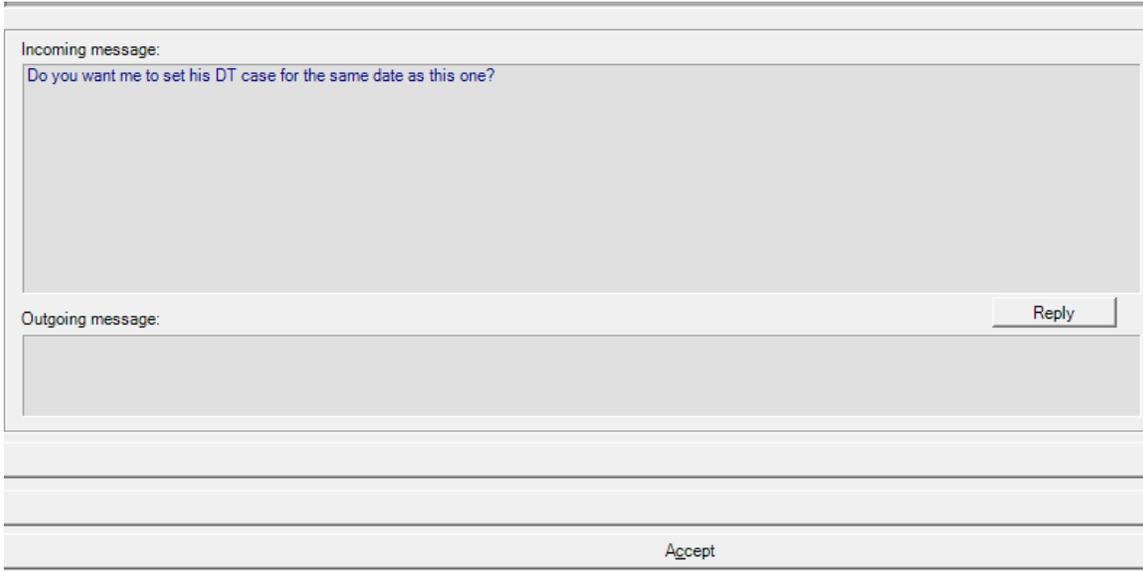
If you didn't use the Signature and Date option, it's not too late to date the document. To add a date next to your signature, right-click and choose Add Annotation/Date. When the menu goes away, click the notice in the spot where you want the date to appear.

Adding a checkmark

If a filing pdf is a fillable form, judge users are allowed to set the checkmark while filling out the form. But what if it's not a fillable form? Suppose you need to mark the geographical limitations of a Submit for Signature warrant, and it isn't a fillable form. In those situations, right-click and choose **Add Annotation/Checkmark**. Then, when the menu goes away, just click the screen where you want the checkmark to appear. You'll see the checkmark then appear in that spot of the notice. Since they are small, moving checkmarks is a little harder than moving a signature or date annotation. It can be done in the same way, but if you have trouble you might want to just right-click the checkmark and choose **Delete Annotation**, and then try adding the checkmark again.

LOOKING FOR, AND RESPONDING TO CLERK MESSAGES

To the left side of the Document Review screen, the Incoming message area will show you any messages that the clerk's office may have sent you. You can reply to the message by hitting the Reply button. In fact, even if the clerk did not send a message to you, you can initiate a message to the clerk by hitting the Reply button.

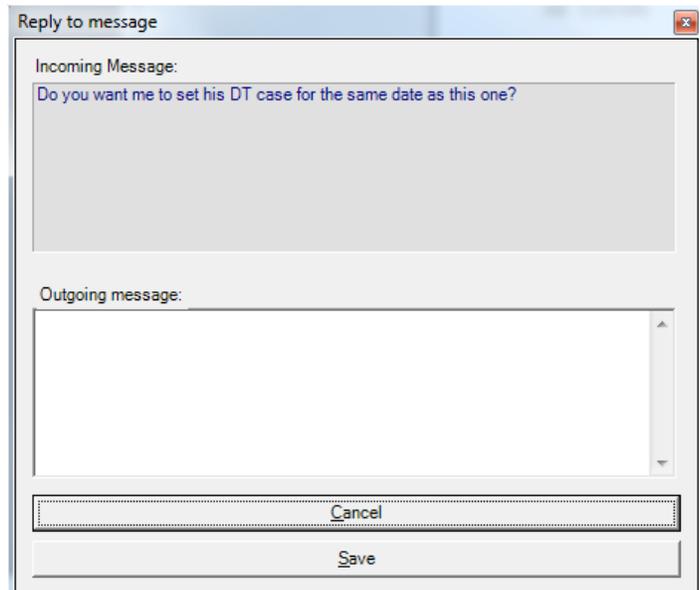


The screenshot shows a software interface with a light gray background. At the top, there is a section labeled "Incoming message:" containing a text box with the message: "Do you want me to set his DT case for the same date as this one?". Below this, there is a section labeled "Outgoing message:" with a large empty text area. To the right of the outgoing message area is a button labeled "Reply". At the bottom center of the screen, there is a button labeled "Accept".

If you don't happen to notice the message, and have therefore not replied, the program will display the message in a new screen, with a Reply box when you hit the Accept button.

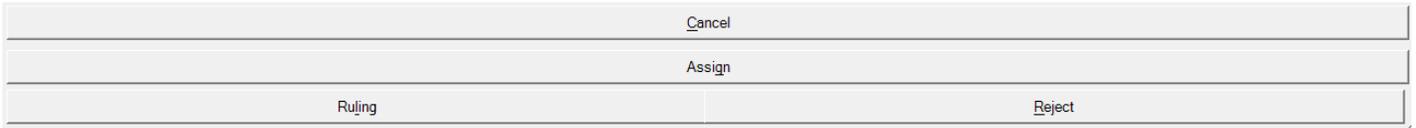
If the message doesn't necessitate a response, you can just hit the Save button. You don't have to reply.

The Cancel button will cancel the Reply screen and take you back to the Document Review screen. This would only be used if you did not intend to accept the document yet, and you need to return to the review screen to look at it again.



The screenshot shows a dialog box titled "Reply to message" with a standard Windows-style title bar (minimize, maximize, close buttons). Inside the dialog, there is a section labeled "Incoming Message:" with the same text as in the previous screenshot: "Do you want me to set his DT case for the same date as this one?". Below this is a section labeled "Outgoing message:" with a large empty text area and a vertical scrollbar on the right. At the bottom of the dialog, there are two buttons: "Cancel" and "Save".

FUNCTION BUTTONS IN THE DOCUMENT REVIEW SCREEN

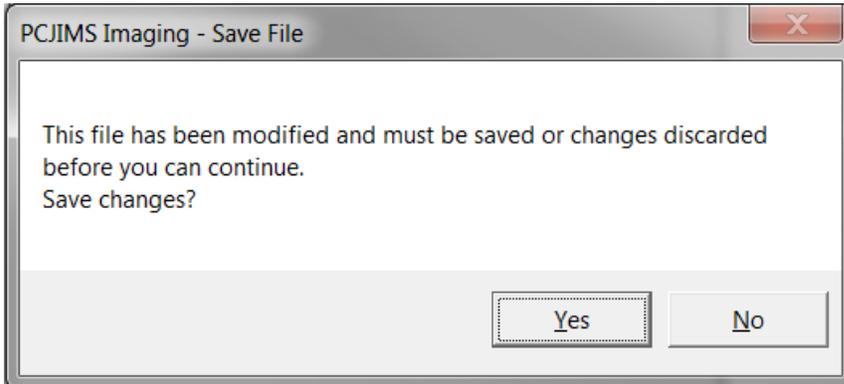


Cancel

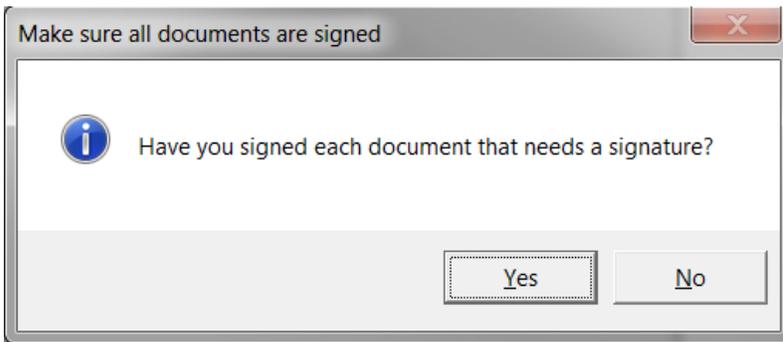
The Cancel button simply takes you out of the Document Review screen and back to the Inbox without saving any changes.

Ruling

If everything looks good to you, and you have signed the documents that need to be signed, click the **Ruling** button at the bottom of the screen. Because you have modified the document, you'll get a message asking if you want to save the document. Click Yes to save your annotations to the document.

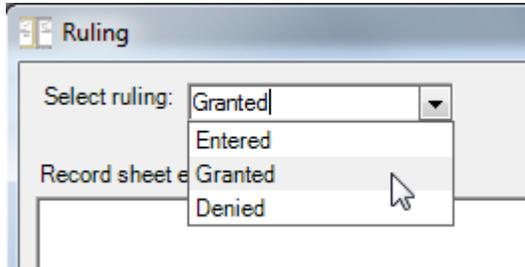


You'll then get a reminder to make sure that you've applied the necessary signatures:



Click No if you forgot to apply your signature and need to go back and do so. Otherwise, click the Yes button.

The next box to appear is where you will select your ruling. If you are accepting the order, click the drop-down, and you'll see ENTERED or GRANTED as options. Choose whichever one you prefer. Below the Select Ruling box is a place where you can type a docket entry, if you need to do so.



Note that while Denied is an option here, it is better to deny something by hitting the Reject/Deny button (described next), as that button gives you the option to reject a document for technical reasons or deny an order.

Be sure you've signed the order before you hit Save. If you forgot to do so, you can click Cancel on the Ruling screen and you'll be returned to the document.

Back in the Inbox, you'll note that the status for that item has changed to Completed/Processed.

REJECT

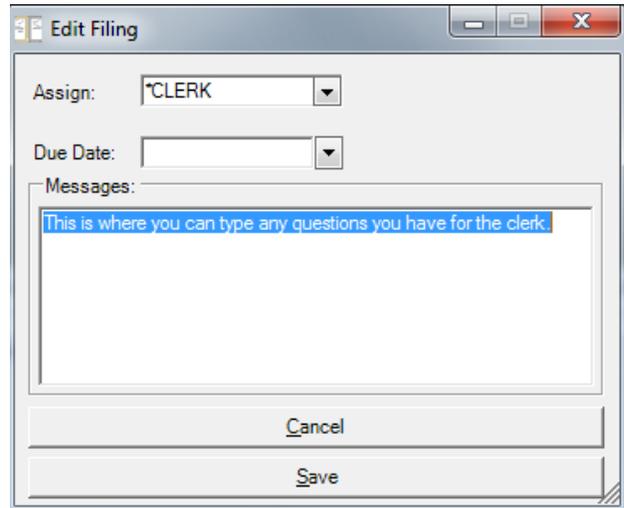
The Reject button is for situations where a proposed order is lacking in some way or has technical problems that the judge wants resolved. To reject a document, click the Reject button, and then, in the text box that displays, add a note to the clerk about why you are rejecting that filing. Click Save to continue. The filing will flow back to the clerk's inbox, where they can contact the attorney and let them know that the document was rejected.

DENY

If your intention is to deny a proposed order, you'll still need to click the Ruling button. But instead of choosing Entered or Granted, you'll choose Denied. Below the Select Ruling box is a place where you can type a docket entry, if you want to do so.

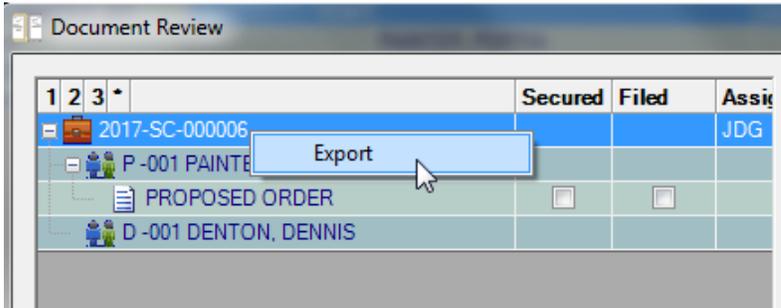
ASSIGN

Judges can choose to assign an e-filing either back to the clerk or to another judge. Assigning the filing back to the clerk is not something you'll probably do very often, as any problems you might have on an e-filing are problems that only the filing attorney can fix. For that reason rejecting the filing is probably the preferable option. However, we can't rule out a situation where the judge doesn't want to reject the filing, but doesn't want to accept it either. Perhaps you just have a question for the clerk about the filing? You can assign it back to the clerk along with your question, and the clerk can assign it back to you, along with their answer. Once the filing comes back, you can decide to accept or reject it then.



EXPORTING A FILING

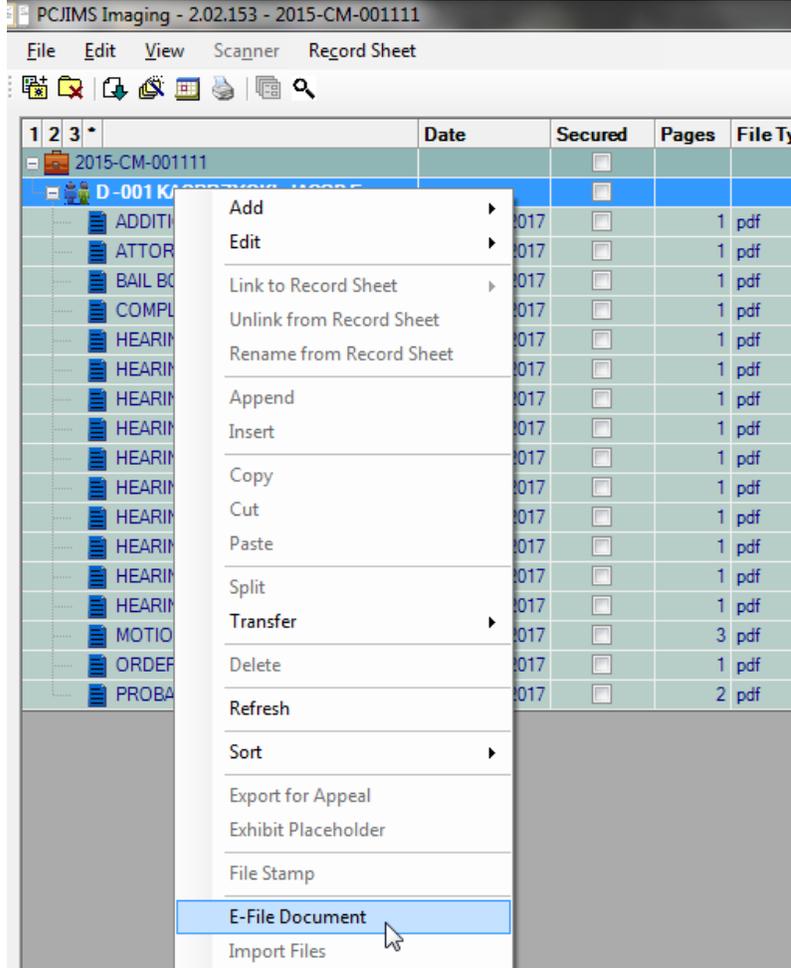
If a proposed order needs more changes than can be accomplished using the annotations toolbar, you do have the option to export the document and make all of the changes you need using your own pdf editor. Once you've edited the document more thoroughly you can then efile your own version of it to the clerk's inbox. To do this, you'll simply right-click on the case number row of the Document Review screen and choose Export. All of the documents you see there will be exported.



NOTE: Exporting documents will cause the Inbox submission to be restated as COMPLETED/PROCESSED.

When you are ready to file your own version of the document, follow the steps on the next page for **Efiling a document to your clerk.**

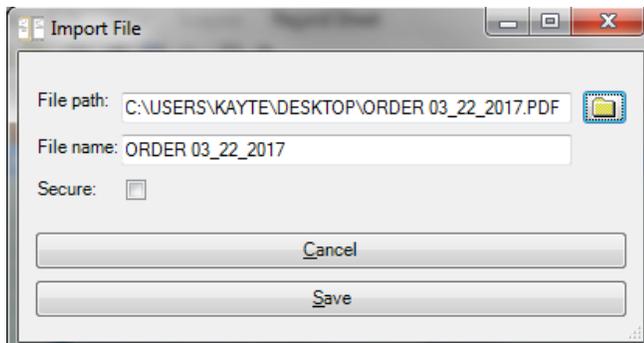
EFILING A DOCUMENT TO THE CIRCUIT CLERK



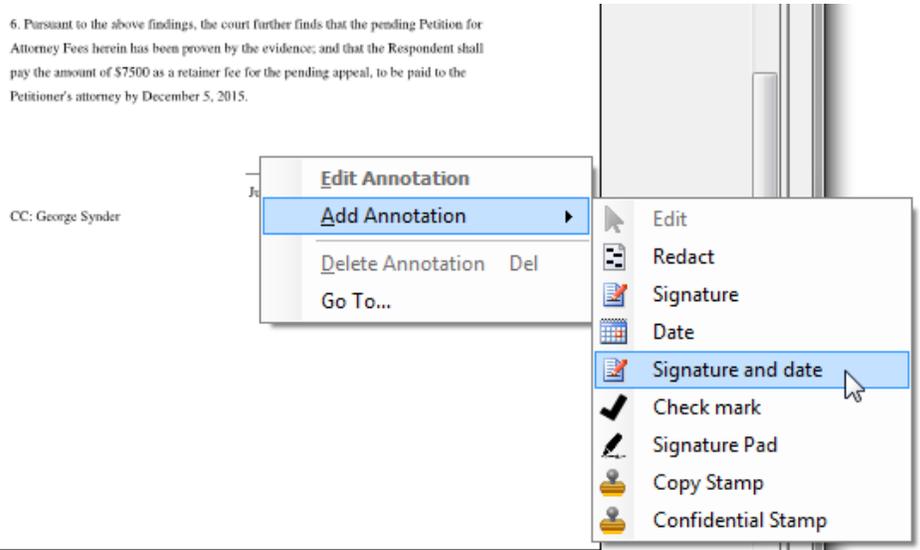
Should you need to file your own order with the circuit clerk, you can do so by using the E-File Document option. To do so, you'll need to pull up that case in th PC JIMS Hub and go into Imaging. Once you are in Imaging, right-click on the litigant's name and choose **E-File Document**.

Click the yellow Browse icon and navigate to the location of the pdf you want to e-file.

If the document should be secured, checkmark the Secure box. Then hit Save.



The next screen to display gives you an opportunity to review the document, and sign it. To apply your signature, right-click and choose either the Signature option, or the Signature and Date option. Then click the document where you would like your signature to appear. You'll be presented with a new sign-in screen. This is to ensure that the person applying your signature and filing this document is really you. Sign in using the same user ID and password that you use for PC JIMS.



You'll see your signature appear on the document. If it doesn't appear exactly on the signature line, you can click the signature and a box will appear around it.



When you see the icon, you can click that icon and drag the signature box to the place where you want your signature to appear. The same is true for a date annotation or any other annotation you might apply.



Once you have your signature and date applied, click the **Send** button to send the filing to your circuit clerk.

Note: If you want to additionally send a ruling and accompanying docket entry with your document, you can go to your own Inbox and process this Inbox submission. You'll be given the usual options to provide a ruling and docket entry and then the filing can be processed by the clerk. You'll want to do this immediately though, less the clerk processes your filing before you've added your ruling to it.

You'll see that the Description for these types of filings says "Filing from PCJ Imaging – Judge".

Submission Type	Key	Litigant(s)	Status	Result	Description	Messages
Submit Filing						
2018-LM-000054-CC-001	19860		Under Review	None		DMC. avail f
Litigant		CHILDRESS, CLARK				
2018-SC-000047-CC-001	19858		Under Review	None		DMC. avail f
Litigant		CHARLES, CHAD				
2018-SC-000045-CC-001	19854		Under Review	None		DMC. Avail f
Litigant		COULTER, CHRIS				
2018-SC-000043-CC-001	19851		Under Review	None		DMC. Avail f
Litigant		COULTER, CHRIS				
2018-SC-000043-P-001	19849		Under Review	None		DMC. dmcA
Litigant		PHISH, FEE				
2015-D-000007-P-001	19845		New	None	Filing from PCJImaging - Judge	
Litigant		KELLY, JAIME				
2015-D-000008-P-001	19844		New	None	Filing from PCJImaging - Judge	
Litigant		KELLY, JAIME				

THE JUDGE’S SIDE OF THINGS: PROCESSING SUBMIT FOR SIGNATURE ITEMS

As mentioned before, not all counties will use the Submit for Signature functionality of the program. But in counties where the circuit clerk is the one who produces documents such as warrants or writs, these documents will be submitted to the judge's Inbox for signature. Once circuit clerk staff have done the necessary setup, and begun to submit such documents, they will come into the Inbox looking something like this:

Submission Type	Key	Litigant(s)	Status	Result	Description	Messages	Assigned To	Due Date
Submit for Signature								
2012-L-000008-P-001	6859		New	None	civil bench warrant			
Litigant		CARLTON, LINDA						
2015-DT-000004-D-001	6856		New	None	FAILURE TO APPEAR WARRANT			
Litigant		CAPONE, AL						
2015-DT-000005-D-001	6857		New	None	FAILURE TO APPEAR WARRANT			
Litigant		KELLERMAN, LARRY						
2015-CF-000005-D-001	6858		New	None	FAILURE TO APPEAR WARRANT			
Litigant		BROWN, PRINCE						

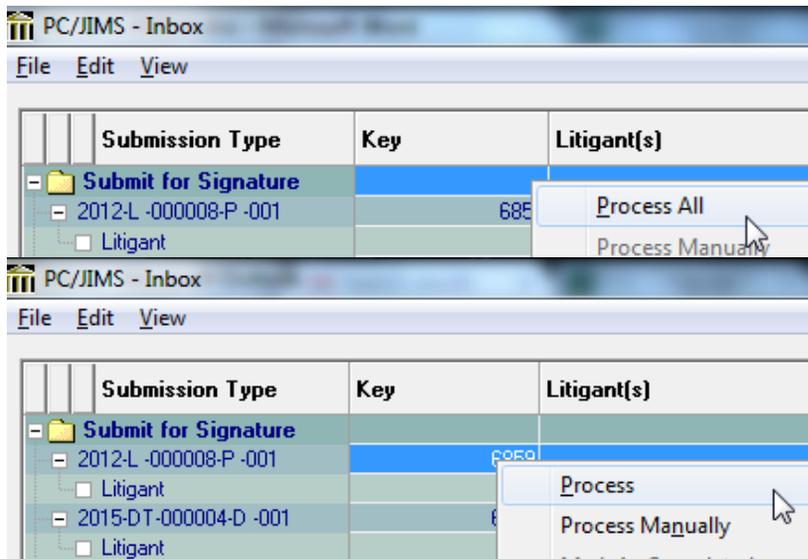
Note that these cases are under a Submission Type of **Submit for Signature**.

Other columns in this screen identify the name of the litigant, the status of the submission, and the name of the Notice Generation document that the clerk is sending.

Assigned To: If the case the notice is for has a specific judge assigned, and if that judge is associated with a user ID in the Edit Judge Table (Technical/Case Management Tables/Edit Judges), then the Assigned To column will indicate which judge needs to sign the document. That being said, in the event that one judge is on vacation, any judge has the ability to use the Assigned to *ALL option, and can sign a document for any case, regardless of whether they are the judge on that case or not.

THE INBOX MENU: PROCESS/PROCESS ALL AND PROCESS MANUALLY

Whereas on electronic filings submitted by attorneys, Process is your only menu option for processing the filing, on Submit for Signature items, you'll actually see variances of the Process option depending upon where you are when you right-click to see the menu.



PROCESS/PROCESS ALL

The Process and Process All options both apply your digital signature and return the document to the circuit clerk’s inbox for filing. But unlike Submit Filing items, on Submit for Signature items, these options can do so automatically, without displaying the document at all. This is only an option because these documents are generated by the circuit clerk's office and judges get them so often that they know what they look like. They might, therefore, not feel inclined to go into each and every one of them to actually look at them. Signing these documents automatically can be done individually, or in batch. The difference is in whether you right-click on the **Submit for Signature** row, which provides the **Process All** option, or on an individual case number, which provides only the **Process** option. The Process All option applies your signature and date to ALL of the Submit for Signature items, while of course the Process option would only do so for the one case you are on. Since applying your signature and date to each notice manually could be time-consuming, you may choose one of these options after you have reviewed the documents using either the Process Manually option, or the View Document option, which is also available on the Inbox menu.

Note: Simply double-clicking a case number will also process a document automatically.

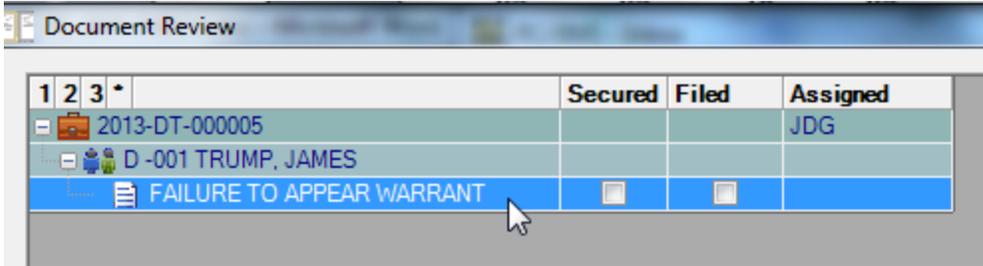
PROCESS MANUALLY

If you'd like to see the document before signing it, you have two options. You can either use the **View Document** menu option, which opens the document in the Document Review screen. Then, after viewing it, you can close the document review screen and process it using the Process option. OR, you can use the **Process Manually** option, which opens the Document Review screen and allows you to see the document, but then requires you to manually affix your signature and date to the document. The easiest of the two is to view the document, and then close it and process it using the more automatic Process option. But if you

have to modify the document in any way, such as marking the geographical limitations on a warrant, you'll have to use the Process Manually option.

REVIEWING THE DOCUMENT

You'll note that the program doesn't default to showing the document first. Instead it is the Record Sheet that is first displayed on the right side of the Document Review screen. That is an intentional effort to ensure that users don't accept documents without looking at them first.



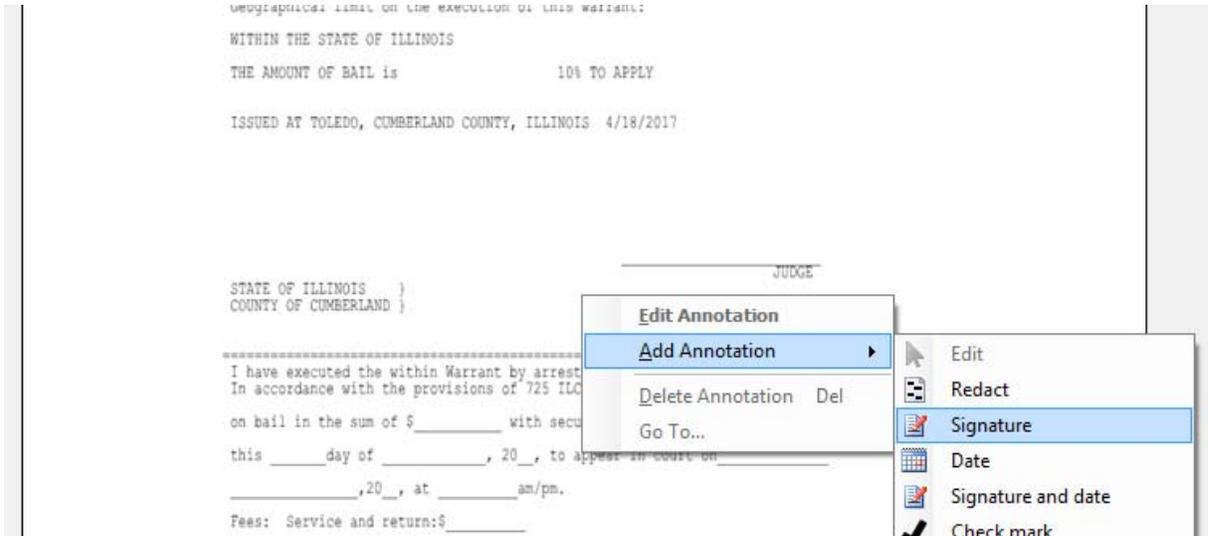
There are two ways to go about seeing the document. One is to click the document name in the Document Review Summary grid. Since that grid is at the core of the activities you need to do, you might find this way to be the easiest, as it will require less back and forth movement of your mouse.

The other way to see the document is to click the tab on the right that shows the document name. In the case below, the Failure to Appear Warrant tab.

Record sheet		FAILURE TO APPEAR WARRANT			
Date	Text	Judge	CR	Changed	User
04/03/2013	Complaint filed on 04/03/2013.			04/03/2014	TM
04/13/2015	Review set for 04/13/2015 at 3:12 in courtroom 1.			04/13/2015	SMM
12/31/2015	FAILURE TO APPEAR WARRANT generated on 12/31/2015.			12/31/2015	KMG

ACCEPTING/GRANTING A SUBMIT FOR SIGNATURE ITEM

Once you are actually reviewing the document itself, if you are processing the document manually, you'll need to right-click on the place where you want to affix your signature, and navigate the menu to Add Annotation/Signature.



When you do so, the menu will go away, leaving you with the document itself again. Click that document in the spot where you want to put your signature. You'll get a sign-on box. This is to ensure that the person who signs the document is actually you. Log in again, and then your signature will appear. If it isn't exactly where you want it, you can click and drag it to move it in one direction or another.

Dating your signature

To add a date next to your signature, right-click and choose Add Annotation/Date. When the menu goes away, click the notice in the spot where you want the date to appear.

Adding a checkmark

Sometimes you'll need to add a checkmark to a document, such as when you need to mark the geographical limitations of a warrant. In those situations, right-click and choose **Add Annotation/Checkmark**. Then, when the menu goes away, just click the screen where you want the checkmark to appear. You'll see the checkmark then appear in that spot of the notice. Since they are small, moving checkmarks is a little harder than moving a signature or date annotation. It can be done in the same way, but if you have trouble you might want to just right-click the checkmark and choose **Delete Annotation**, and then try adding the checkmark again.

LOOKING FOR, AND RESPONDING TO CLERK MESSAGES

To the left side of the Document Review screen, the Incoming message area will show you any messages that the clerk's office may have sent you. You can reply to the message by hitting the Reply button. In fact, even if the clerk did not send a message to you, you can initiate a message to the clerk by hitting the Reply button.

The screenshot shows a software interface with a light gray background. At the top, there is a section labeled "Incoming message:" containing a text box with the message: "Do you want me to set his DT case for the same date as this one?". Below this is a section labeled "Outgoing message:" with an empty text box. To the right of the outgoing message box is a button labeled "Reply". At the bottom center of the screen is a button labeled "Accept".

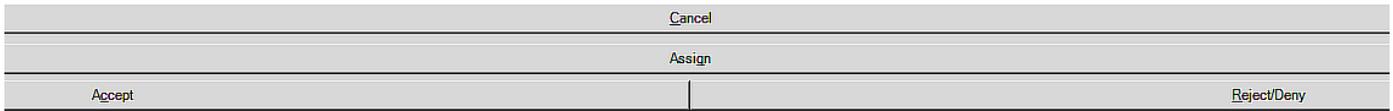
If you don't happen to notice the message, and have therefore not replied, the program will display the message in a new screen, with a Reply box when you hit the Accept button.

If the message doesn't necessitate a response, you can just hit the Save button. You don't have to reply.

The Cancel button will cancel the Reply screen and take you back to the Document Review screen. This would only be used if you did not intend to accept the document yet, and you need to return to the review screen to look at it again.

The screenshot shows a dialog box titled "Reply to message" with a standard Windows-style title bar (minimize, maximize, close buttons). Inside the dialog, there is an "Incoming Message:" section with the text: "Do you want me to set his DT case for the same date as this one?". Below that is an "Outgoing message:" section with an empty text box and a vertical scrollbar on the right. At the bottom of the dialog are two buttons: "Cancel" and "Save".

FUNCTION BUTTONS IN THE DOCUMENT REVIEW SCREEN

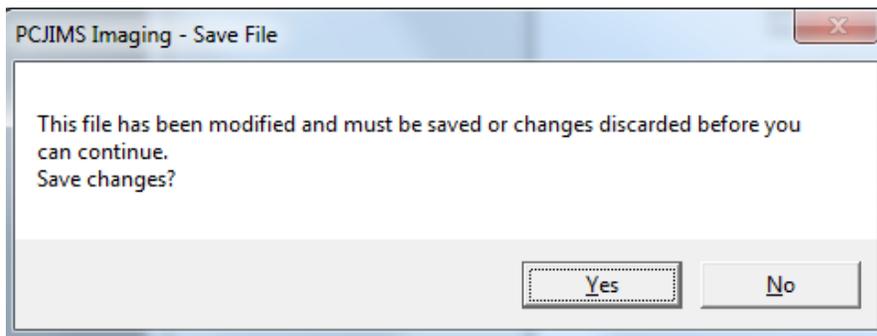


Cancel

The Cancel button simply takes you out of the Document Review screen and back to the Inbox without saving any changes.

Accept

If everything looks good to you, click the **Accept** button at the bottom of the screen. Because you have modified the document, you'll get a message asking if you want to save the document. Click Yes to save your annotations to the document.

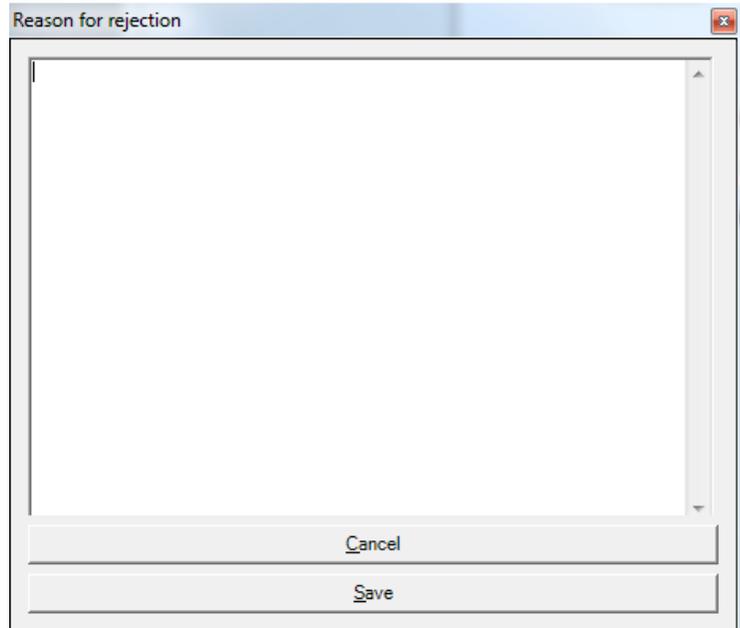


Back in the Inbox, you'll note that the status for that item has changed to Completed/Processed.

REJECTING/DENYING A SUBMIT FOR SIGNATURE ITEM

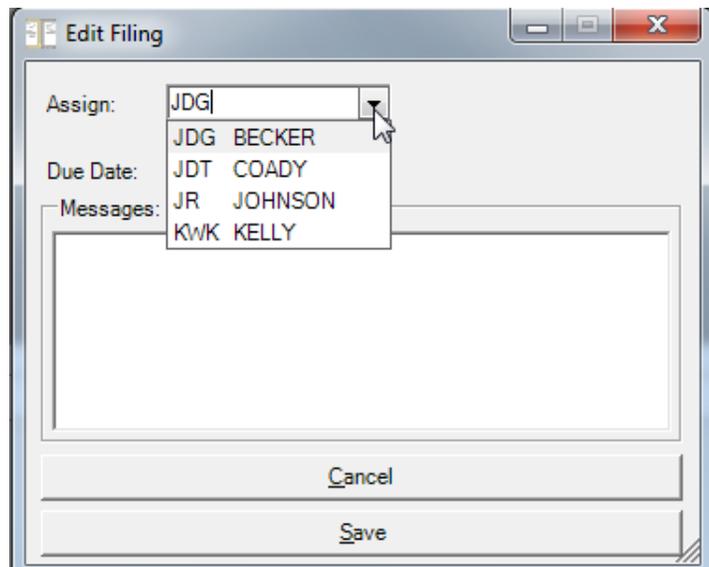
If the document doesn't meet with your approval, and you don't want to sign it, instead just click the Reject/Deny button. The next screen to display will be the Reason for Rejection box. Type your reason for rejecting the document.

When you click Save, and you are back in the Inbox, the status for that filing will be Completed/Processed.



ASSIGNING A SUBMIT FOR SIGNATURE ITEM TO A DIFFERENT JUDGE

If you need to forward this document to a different judge, you can do so using the Assign button. Unlike the Submit Filings, Submit for Signature items cannot be assigned back to the clerk. The idea is that since they originated FROM the clerk, any problems you might have with the document should be handled by rejecting it, and explaining why in the Reason for Rejection screen. So you'll note that on a Submit for Signature item, you can only assign the document to other judges. If you do so, use the Messages box in this screen to let the other judge know why you are sending it their way. The due date field is only used by the clerk.



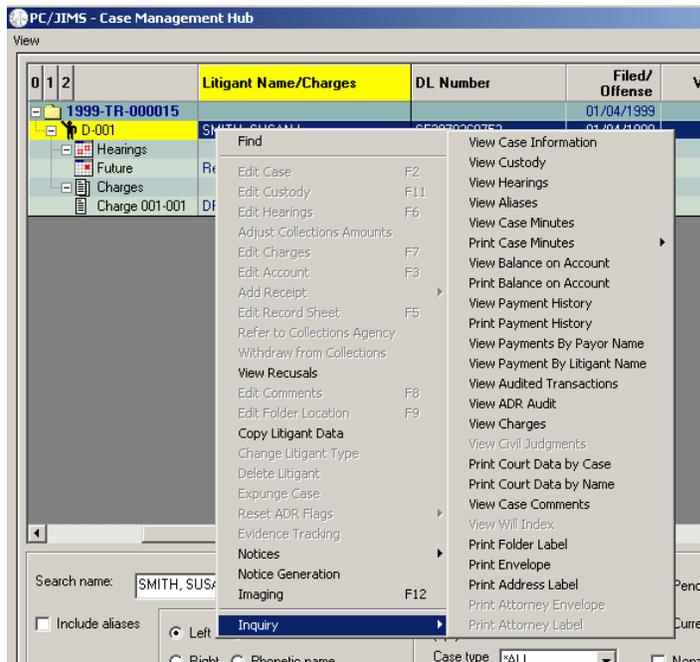
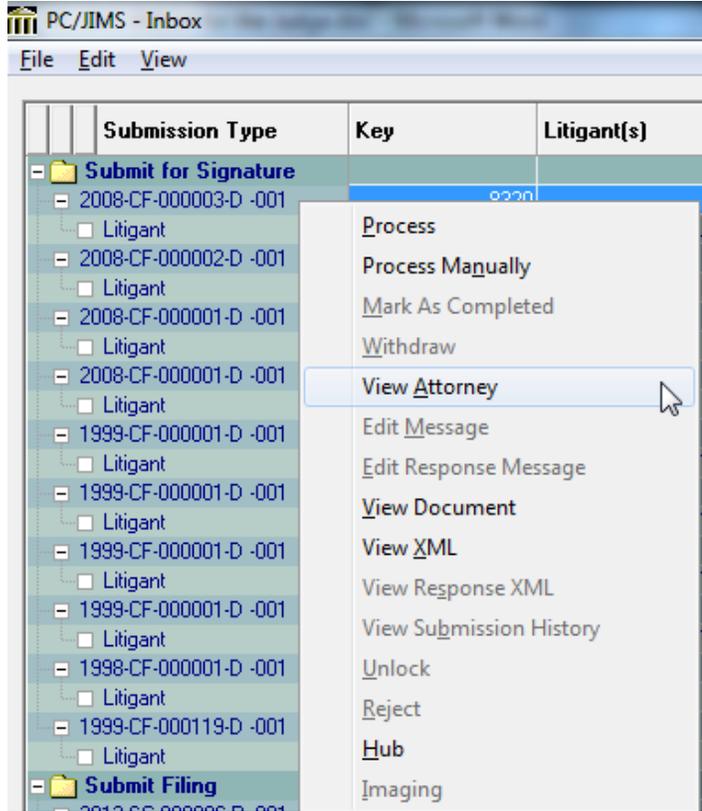
THE JUDGE'S SIDE OF THINGS: OTHER INBOX OPTIONS

We've covered the Process/Process All and Process Manually options, so now let's take a look at the other options that are available to judges on the Inbox menu.

View Attorney--Use this option to see the attorney for this litigant, along with their address, email address and phone numbers.

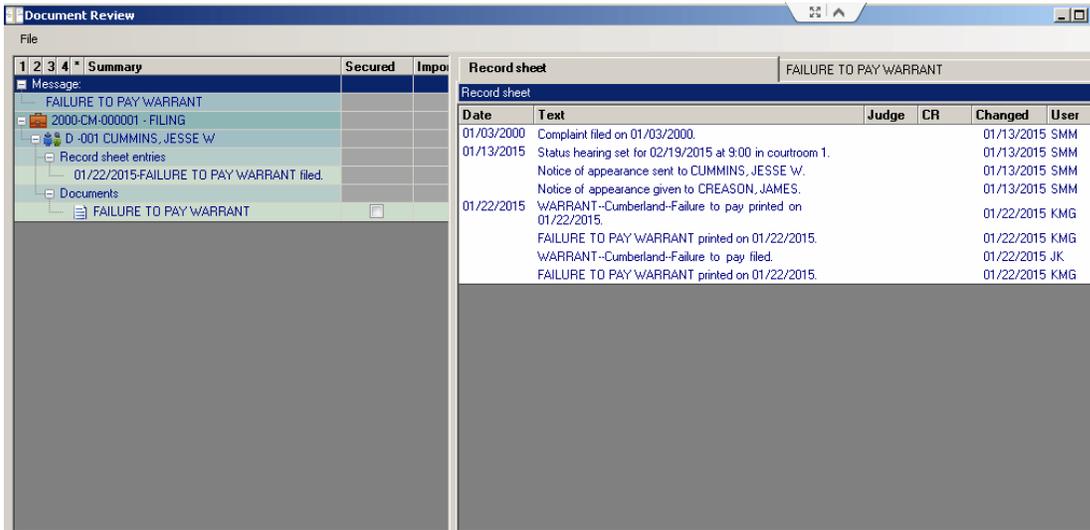
View Document--This option also takes you into the Document Review screen, but a view-only version of that screen--one that is not designed for accepting or rejecting documents. This option would be used most often to view documents that have already been processed.

View XML--This option shows only the data on a filing.

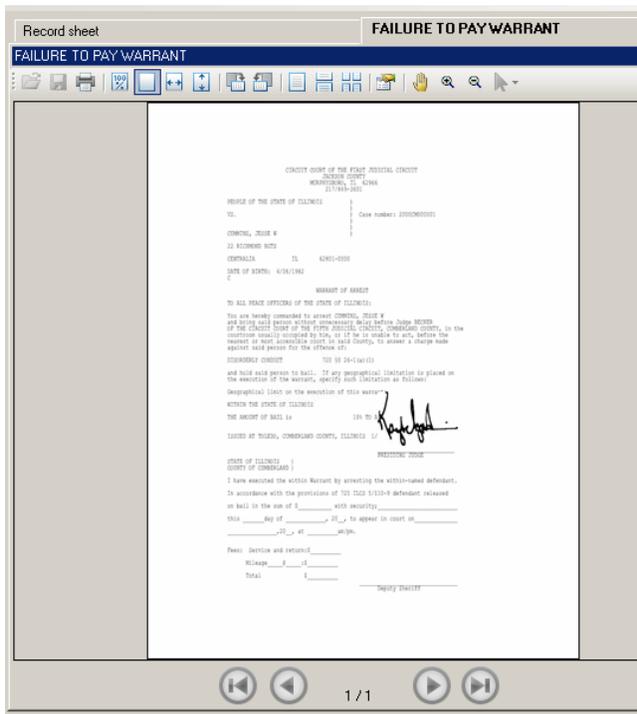


Hub
The Hub option will take you to the Case Management Hub for that case, where you will have access to all of your usual Inquiry options.

THE DOCUMENT REVIEW SCREEN: A FULL DESCRIPTION



When you come into the Document Review screen, you'll be presented with the index of documents for this filing on the left, and the record sheet on the right. Note there will be tabs in the upper-right corner for each document that was part of this filing. In this case, a Failure to Pay Warrant...click that tab to review the document.



The Document Review screen gives you access to many common functions:

 At the bottom of the screen, these arrows will move through the pages to the left or right. Note that the  will take you to the beginning of the document and the  icon will take you to the end of it.

This toolbar across the top of the screen gives you many different options:



 The printer icon is of course what you'll use when you want to print the document.

 These icons change the view to show the document at its actual size, , or fit the document to the screen either in its entirety

 or in its full length  or width .

 Should you need to rotate a document, these icons will rotate 90° to the left or to the right.



For multi-page documents, these icons will allow you to preview more than one page at a time.



The Properties icon will show you technical details about the size and location of the document.



The Mouse Drag icon allows you to move a document up or down if you are zoomed in so much that a sidebar scroll appears.



The Magnifier icons are to zoom in and out of a document.



This icon is for annotating a document—a function that is not available for Notice Generation documents that are being exported to Imaging.