Attorney Training Manual

Colorado Courts E-Filing

Contact Information

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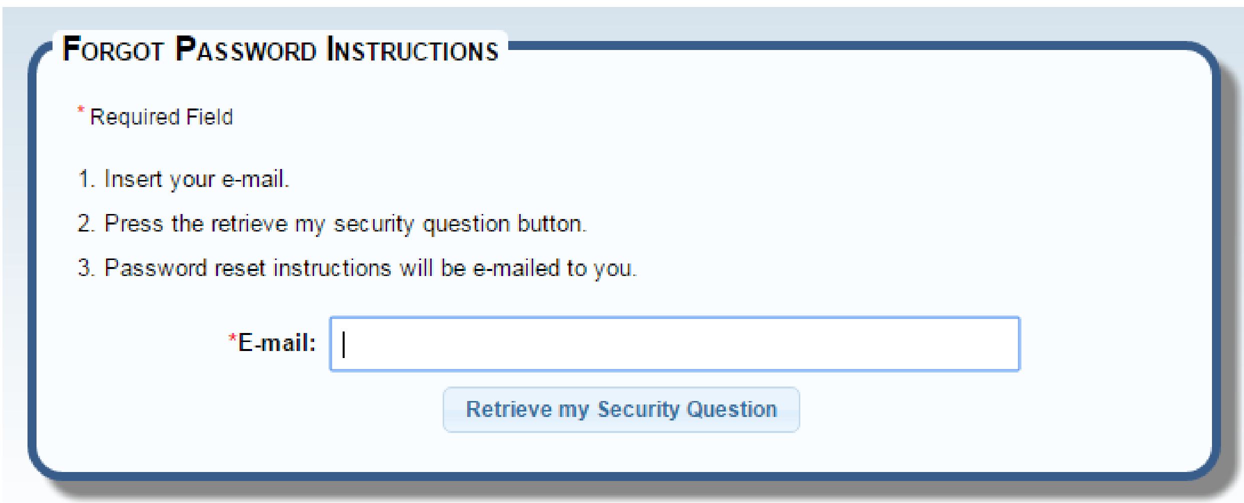
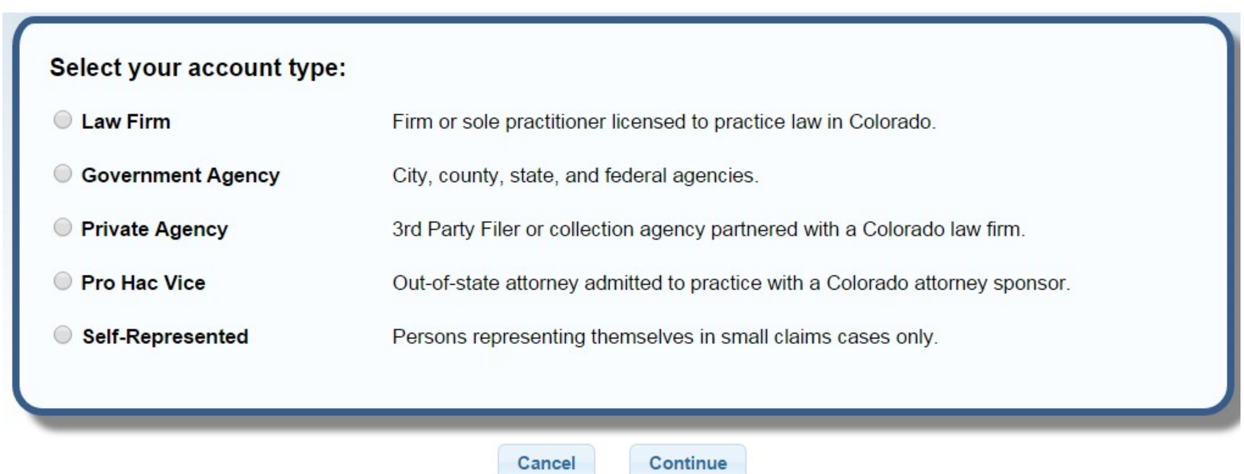
LOGIN / REGISTER ORGANIZATION

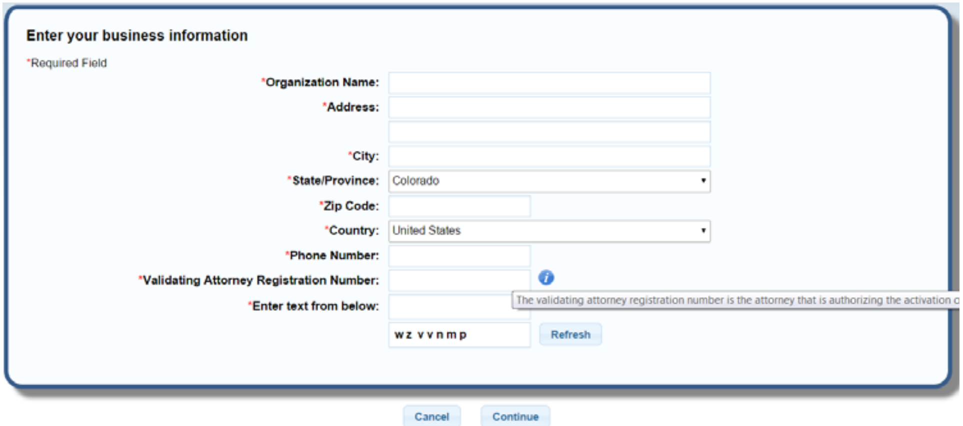
1. Enter your email address and password. Press the “Sign-In” button.
2. If you forgot your password, press “Forgot Password” link and follow the instructions on the screen.



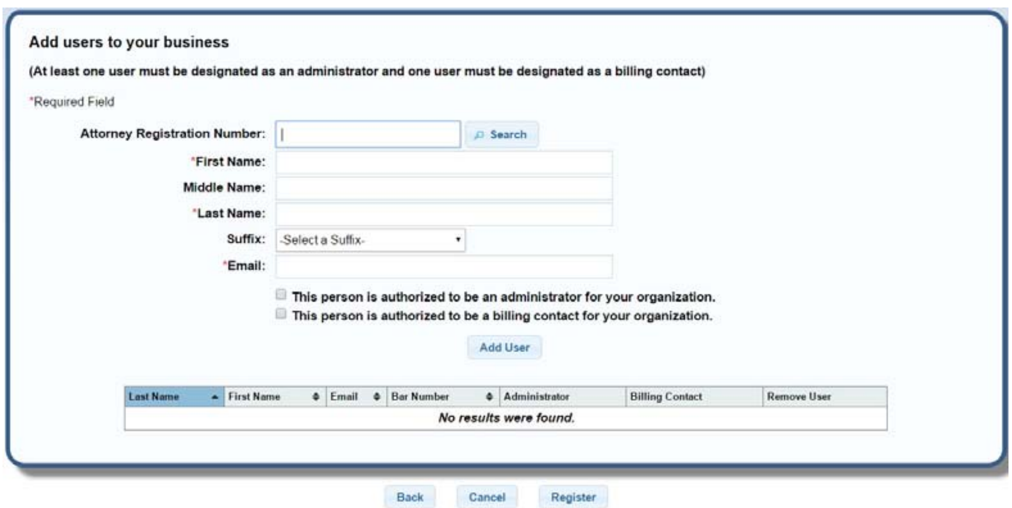
3. If you have not registered your organization, click the Create account link.



   a. The user will be taken to a screen that gives you a description of the various account types. Select the appropriate option and press “Continue” button.



1. Based on the selection made complete all required information (A red asterisk means the information is required) and press the “Continue” button.



Adding User Accounts

One or more users can be added on this screen, fill out all required fields. (Additional users can be added or removed by an administrator once the organization is registered). At least one administrator and one billing contact need to be designated, these designations can be one individual or separate individuals.

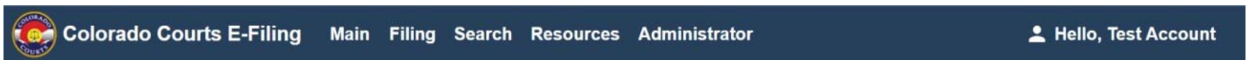
1. When entering an attorney registration number, select the search button to populate the information.

2. An e-mail will be sent to each user added with account activation instructions.

Activating Attorney Accounts

It is extremely important that all attorneys in your organization activate their E-filing accounts. Until these accounts are activated, the attorney cannot be e-served and filings made on their behalf cannot be submitted.

Case security is also tied to attorney accounts. If attorneys in your organization do not have activated accounts, your organization may not have access to the appropriate cases, even though those attorneys may be listed as attorneys of record on the case.



NAVIGATION BAR

Welcome to the Colorado Courts E-Filing system. The navigation bar on the top of the screen provides the ability to move through the E-Filing system. Here is an overview of available options on the navigation bar:

Main: View important information through Alerts. Monitor specific cases or an entire organization's cases through Cases. Your recent filing activity is available through Recent Actions. Review your upcoming court dates through Schedule. From your Alerts, Recent Actions, Case History or Advanced Search Results, you can download mass documents and access them from My Downloads. Your organization's cases can be quickly accessed from the home page using the Quick Search feature. Easy access to File a New Case or File into an Existing Case is available through the folder icons on the home page.

Filing: File a New Case, File into an Existing Case, continue a Draft or Manage Batch Filings on the Filing screen. Scheduled Filings can also be viewed or edited on the Filing screen.

Search: Quickly search through cases with Quick Search, or perform an Advanced Search on all e-filed cases.

Resources: Access important Resources for customer support, court fees, frequently asked questions, and links to court-related websites.

My Account: Make changes to account information through My Profile, or reset a password through Reset Password. Also set e-mail and alert preferences through Preferences.

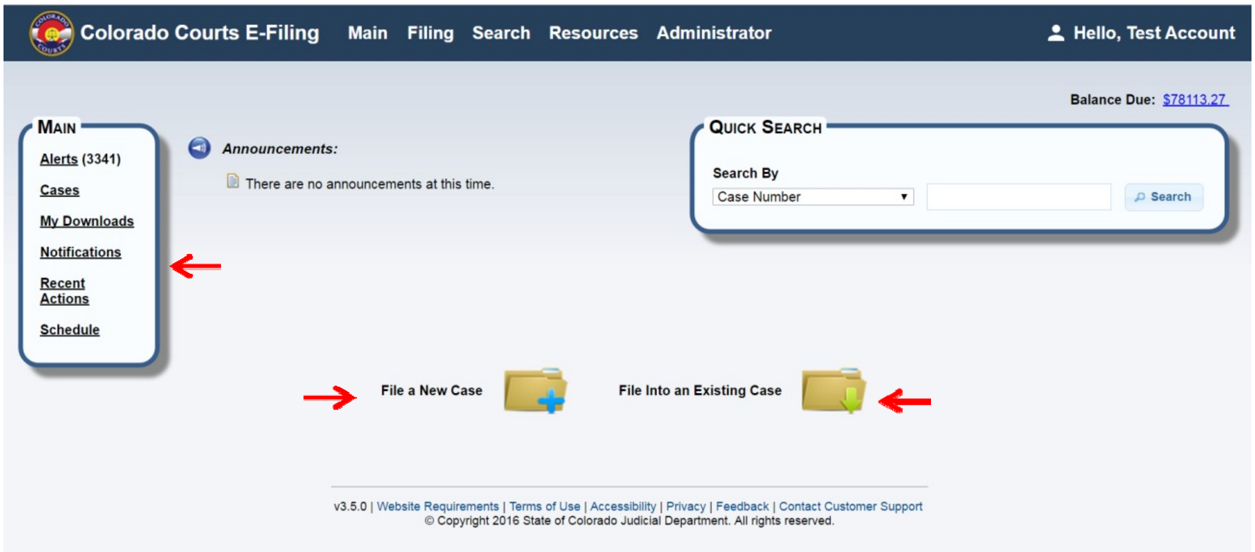
Administrator: Administrators can manage their organization on this screen through the following links: "Add a User," "Modify an Organization," or "Modify a User."

Sign Out: Logout of the e-filing system. For security purposes, the Colorado Courts E-Filing system times the user out after two (2) hours of inactivity. It is also important to ***always sign out*** once work is complete.

HOME PAGE

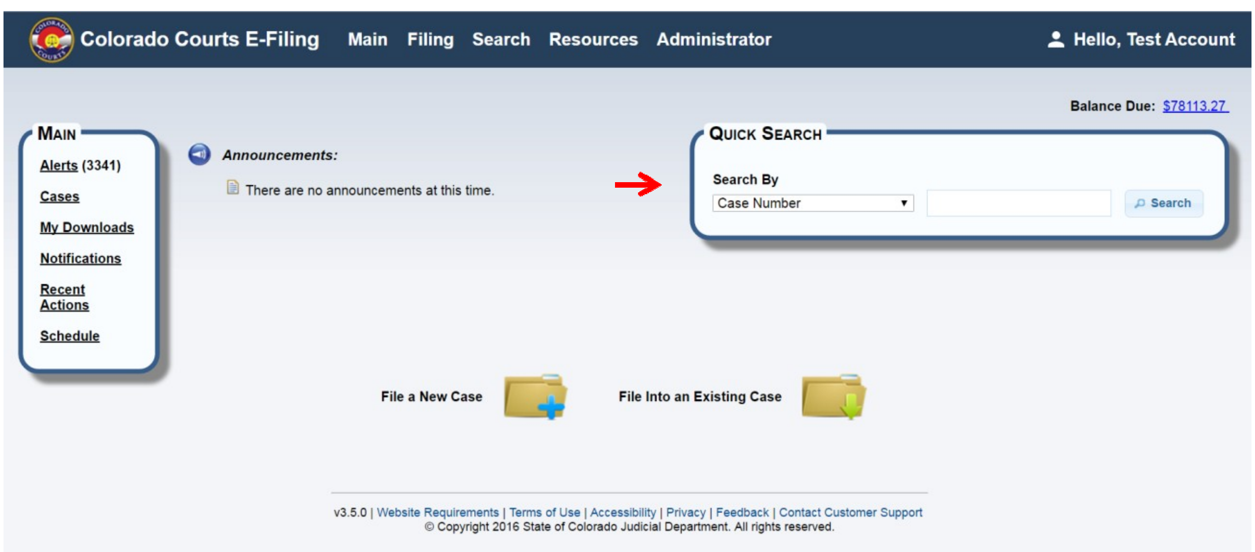
The Home page is the location where each user lands after logging into Colorado Courts E-Filing.

On the left, there is a menu to access hyperlinks for Alerts, Cases, My Downloads, Notifications, Recent Actions, and Schedule.



Current program announcements and updates display in the center of the Home page.

Folder icons are available for "File a New Case" or "File into an Existing Case." Select the appropriate icon.



The Quick Search feature on the Home page provides fast searches of cases by Attorney Name, Attorney Registration Number, Business Name, Case Number, Document ID, Filing ID or Person’s Name.

Note: A quick search for Suppressed or Limited Access cases can only be done if the user is a party to said case.

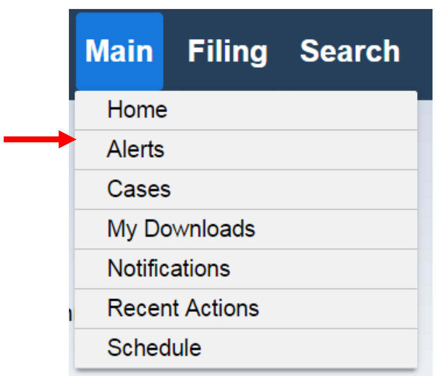
ALERTS

"Alerts" is an inbox displaying e-filed document items e-served by the court, or by another case party.

- When the court reviews and accepts a new e-filed case, it displays as "New Case Accepted."
- If any e-filed item is reviewed and subsequently rejected by the court, it displays in the alerts inbox as "Rejected."
- Serve-only documents also display in alerts, and are displayed as "Service."
- Courtesy copies of documents e-served from a new case filing display in alerts as "Courtesy Copy."

To forward or copy your alerts to another member of your organization, go to Preferences under the My Account Tab.

ALERTS – HOW TO FIND



From the Home screen, click **Main** and select "Alerts" from the menu.

ALERTS – FILTERS

Filters at the top of the alerts table are used for setting viewing preferences.

1. **From:** and **To:** These date boxes provide viewing for a date range. Click inside each date box to select a specific date from the pop-up calendar.

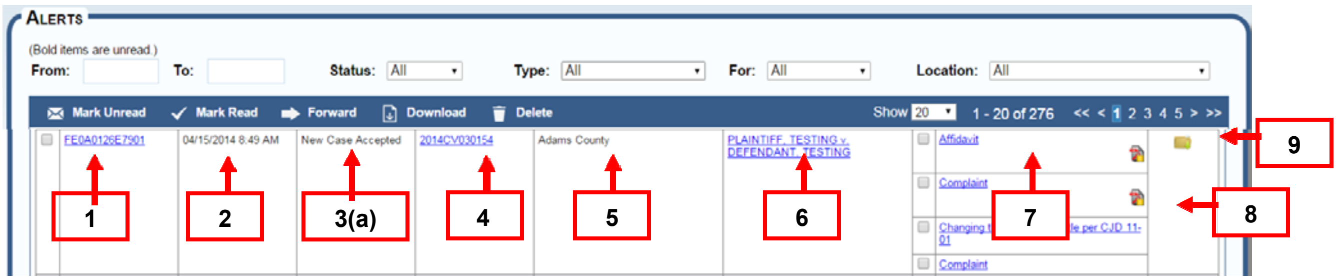
2. **Status**: Provides choices for viewing as status of All, Read or Unread alerts. Click the arrow to select.

3. **Alert Type**: There are choices for viewing alert types including - All, Courtesy Copy, New Case Accepted, Rejected or Service. Click the arrow and select.

4. **For**: Filter by users within your organization.

5. **Location**: Choose an alert view for one or all court locations. Click the down arrow to select the desired court location from the list.

ALERTS – TABLE COLUMNS



1. **Filing ID**: Is a unique number that identifies a single e-filing transaction consisting of one or more e-filed documents.

2. **Received Date**: This column displays the date an Alert was received.

3. **Type**: An alert type "New Case Accepted" displays whenever a new case is accepted by the court. Served items display as a "Service" alert type and courtesy copies display as "Courtesy Copy." An alert type of "Rejected" displays whenever the court rejects an e-filed item.

    a. If an e-filed item is rejected, the reason displays as hover help.

    View hover help by passing your mouse over the orange caution triangle next to a rejected item in the "Type" column. Click on the orange caution triangle for a larger view of the rejected reason.

    Note: The court may only reject a filing based on CJD 11-01.

4. **Case Number:** Each case is assigned a case number as it relates to a selected court location. Case numbers for accepted cases display as hyperlinks. View case history by clicking on the case number hyperlink.

5. **Location:** The location column identifies where a case or document was e-filed.

6. **Case Caption:** This column displays the caption as accepted or created by the court. If it is an existing case or a new case that has been accepted, it displays as a hyperlink. View case information by clicking on the case caption hyperlink.

7. **Document Title:** The title of a filed document.

    a. <u>View Document</u>: Click the hyperlink to display the PDF document.

8. **Redacted Document Icon:** This will display only if the original document that was filed has been redacted and uploaded by the court. Click on the icon to view the redacted version of the original document.

9. **Action**: A user can take action on a filing by clicking the icon folder image.

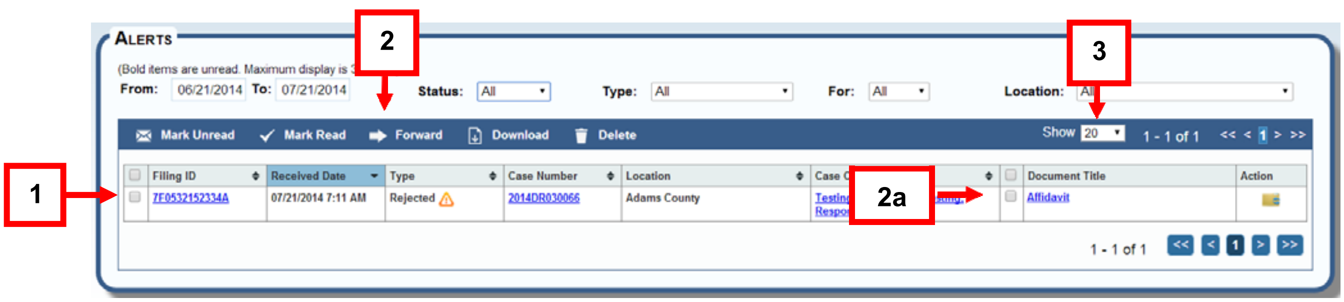
   - When you select the icon for "File into this case" for a New Case, Courtesy Copy, or Service item, this launches you into the File Into Existing Case file builder so you can file a new document in that case.

   - When you select the icon for "Re-file this filing" for an item Rejected in an existing case, the e-filing system rebuilds the filing starting from the "Select Filing Party(ies)" screen. Edit the filing information or document and re-submit to the court.

   - When you select the icon for "File into this case" for a new case the court rejected, the e-filing system will ask you to verify the county, return date, and time. The e-filing system will ask for a return date and time only if they apply to the case type.

ALERTS – TOOLBAR - MANAGING ALERTS

The alerts screen is similar to an e-mail inbox. Table items can be marked as read or unread. Alert items can also be removed or downloaded.



1. Select the Alert item(s) by clicking in the check box next to the item(s). Clicking the checkbox at the top selects all items in the table.

2. Select one of the menu bar options: *Mark Unread*, *Mark Read, Forward, Download or Delete*.

   a. The download feature can also be used in conjunction with the checkboxes next to the document(s) user wishes to download.

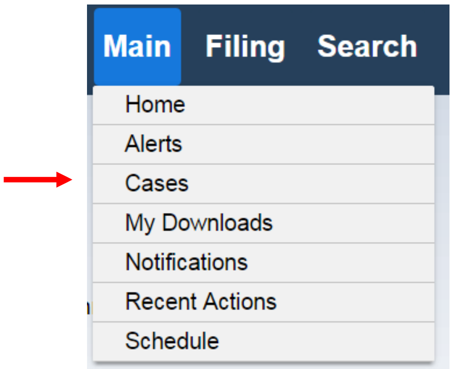
3. **Show**: View 20, 50 or 100 cases per page. Click the arrow and select a viewing preference.

CASES

The Cases page displays a listing of an organization's court cases. Cases display in this list only if:

1. An attorney from your organization is associated to the case(s), or
2. Your organization has successfully filed a document into the case through the Colorado Courts E-Filing system.

CASES – HOW TO FIND

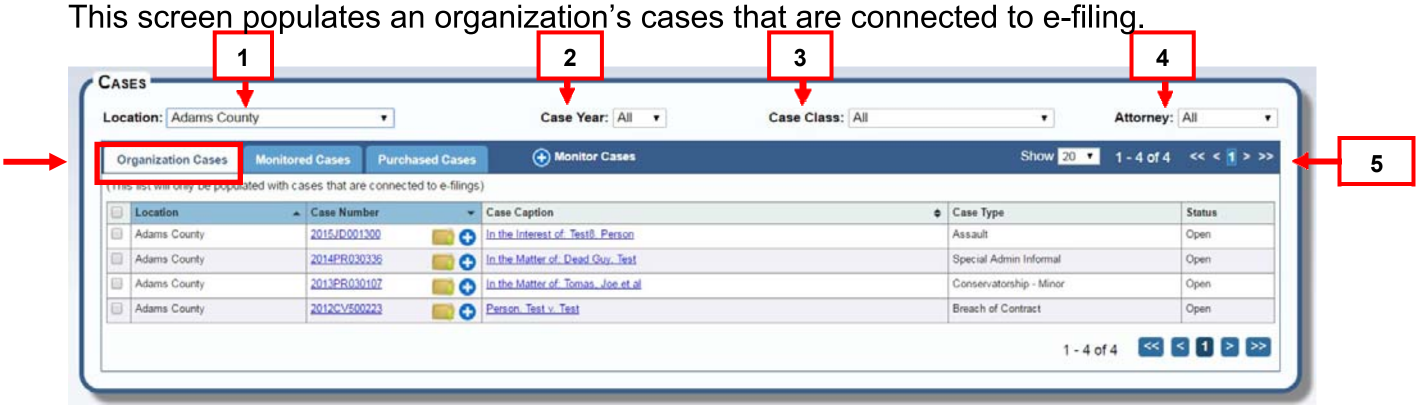


From the Home screen, click **Main** and select "Cases" from the menu.

This screen features a view for an organization's cases and another for listing monitored cases and purchased cases. Click on specific tab to view.

CASES – ORGANIZATION CASES – FILTERS

This screen populates an organization's cases that are connected to e-filing.



1. **Location:** A user can opt to view a specific court location or all court locations. Click the arrow for a list of available court locations, and select.

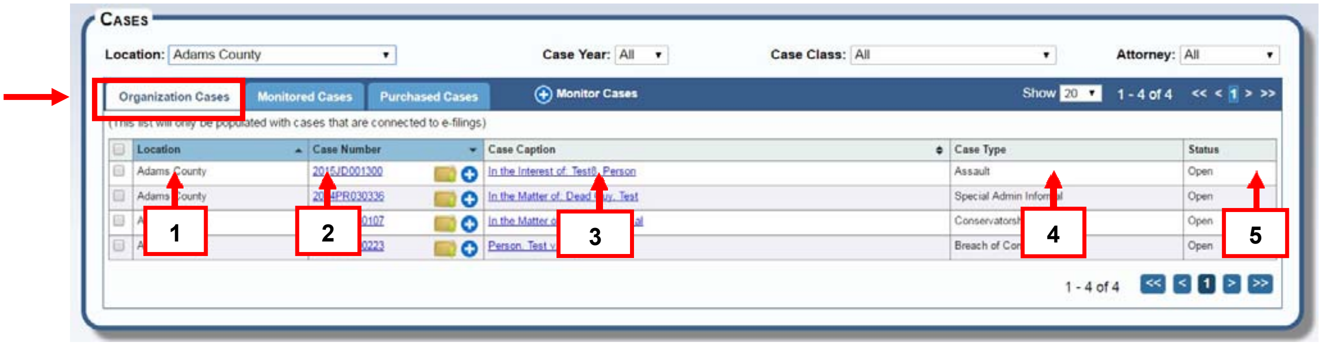
2. **Case Year:** This will enable a user to search for all cases for a specific year.

3. **Case Class:** A user can filter from the box for a specific case class. Click the arrow for a list of cases classes and select.

4. **Attorney:** This box displays all attorneys within an organization. Click the arrow for a list of attorneys. Highlight and click to select.

5. **Show**: View 20, 50 or 100 cases per page. Click the arrow and select a viewing preference.

CASES – ORGANIZATION TABLE COLUMNS



Click the down arrow on any column header to sort for a viewing preference.

1. **Location**: The location column identifies where a case was filed.

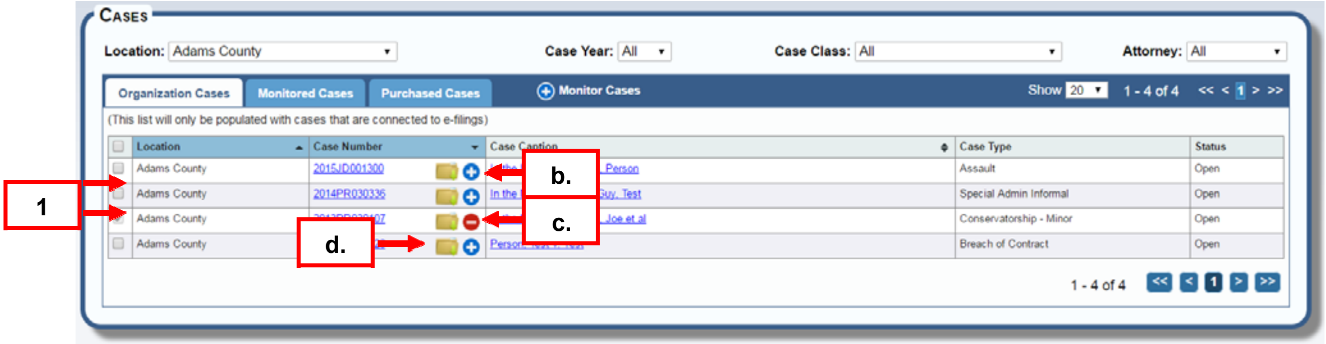
2. **Case Number – Organization Cases:** Each case is assigned a case number as it relates to a selected court location. Case numbers in this table display as hyperlinks. View case history by clicking on the case number hyperlink.

3. **Case Caption:** This column displays the caption as accepted or created by the court. Case caption in this table display as hyperlinks. View case information by clicking on the case caption hyperlink.

4. **Case Type:** The case type column displays a case type as it relates to a case class. Ex., a breach of contract is a type of case in the civil case class.

5. **Status:** View a case status, open or closed.

CASES – ORGANIZATION ICON SYMBOLS



1. Place multiple cases in monitored status by selecting the desired checkboxes.

   a. Press the plus button “Monitored Cases” in the toolbar.

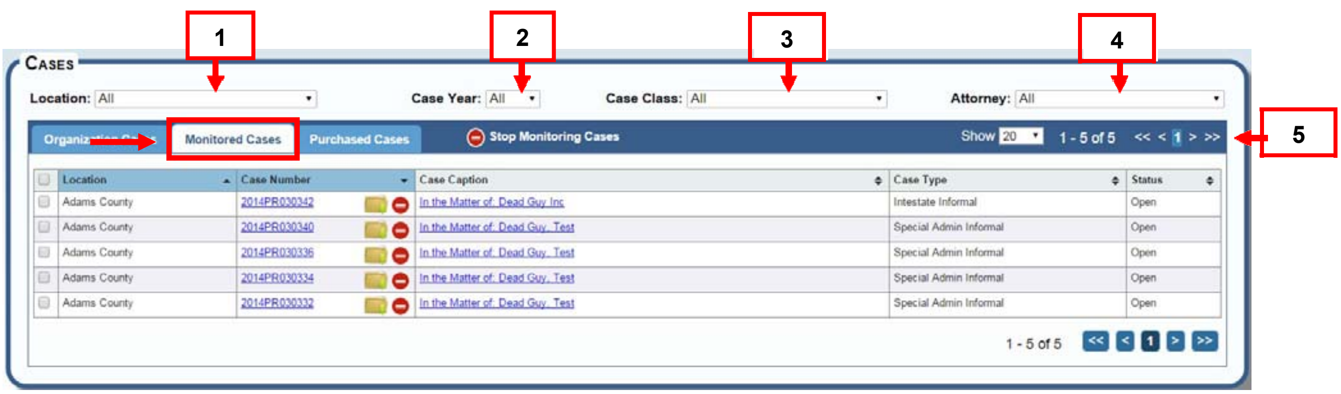
   b. Click the plus icon to place a case into monitored status. The case is added to the monitored cases table, but now displays with a minus icon.

   c. Click the minus icon, and the case is removed from monitored status and redisplays with a plus icon.

   d. Click the file folder icon and the system will take you to the file into this existing case. The system will pre-populate the county and case number fields.

CASES – <u>MONITORED CASES</u> – FILTERS

Monitored Cases displays a table of cases that were added when a user previously opted to monitor a case. Any case can be placed in monitored status.



If you want to monitor a case outside your organization, search the desired case using the Quick Search. Click the Search tab and then select Quick Search.

   a. Locate the case from “Search Results.”

      i. Click the plus icon to the right of the case number. The case will be added to your monitored cases list. There is a fee associated with viewing a monitored case outside your organization but there is no fee to place any case in monitored status.

b. If the case is within your organization, locate the correct case from “Quick Search Results.”

ii. Click the case number hyperlink, and then click the plus icon on the “Case History” page. The case will be added to the monitored cases list in your account.

1. **Location:** A user can opt to view a specific court location or all court locations. Click the arrow for a list of available court locations and select.

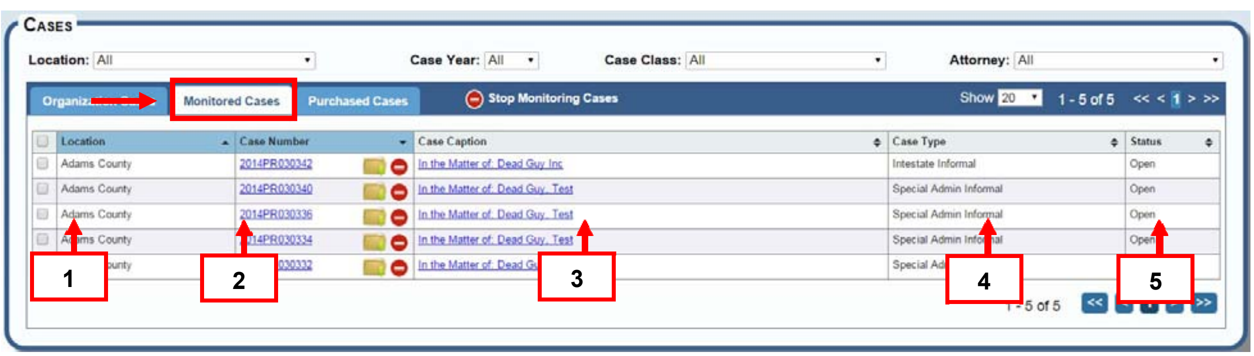
2. **Case Year:** This will enable a user to search for all cases for a specific year.

3. **Case Class:** A user can filter from the box for a specific case class. Click the arrow for a list of cases classes and select.

4. **Attorney:** This box displays all attorneys within an organization. Click the arrow for a list of attorneys. Highlight and click to select.

5. **Show**: View 20, 50 or 100 cases per page. Click the arrow and select a viewing preference

CASES – MONITORED CASES TABLE



Click the down arrow on any column header to sort for a viewing preference.

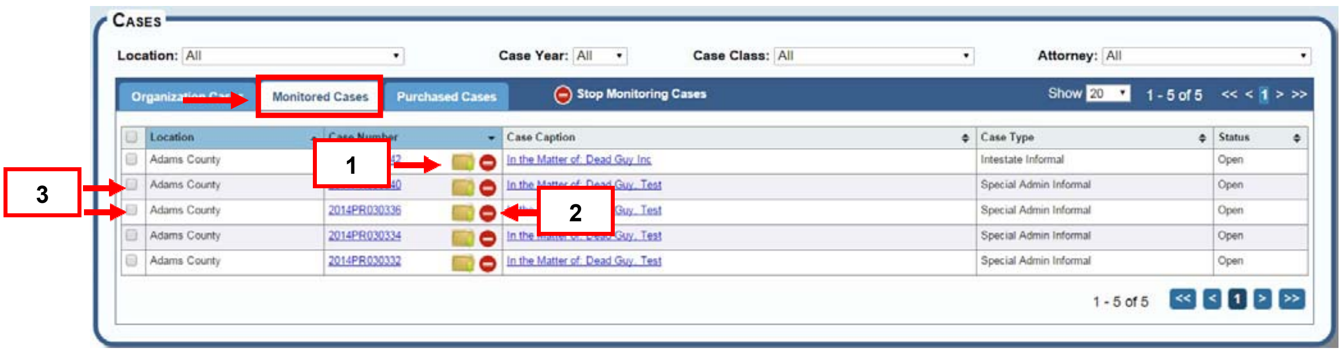
1. **Location:** The location column identifies where a case was filed.

2. **Case Number** – **Monitored Cases**: Each case is assigned a case number as it relates to a selected court location. Case numbers in this table display as hyperlinks. View the case history by clicking on the case number hyperlink.

   - If a case is highlighted in red it is either suppressed or limited access.

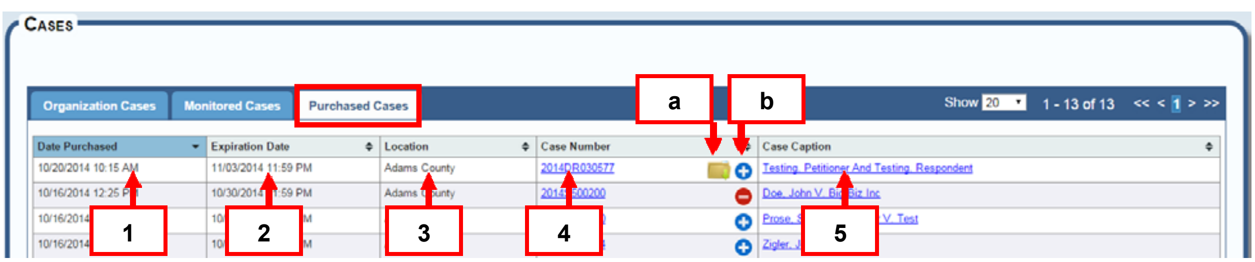
3. **Case Caption:** This column displays the caption as accepted or created by the court. Case caption in this table displays as a hyperlink. View the case information by clicking on the case caption hyperlink.
4. **Case Type:** The case type column displays a case type as it relates to a case class. Ex., a breach of contract is a type of case in the civil case class.
5. **Status:** View a case status, closed or open.

CASES – MONITORED CASES ICON SYMBOLS



1. Click the file folder icon and the system will take you to the file into this existing case. The system will pre-populate the county and case number fields.
2. Click the minus icon to remove a case from monitored status.
3. Remove multiple cases from monitored status by selecting the appropriate checkboxes.
    a. Press the “Stop Monitoring Cases” button.

CASES – PURCHASED CASES COLUMNS AND ICONS



Click the down arrow on any column header to sort for a viewing preference.

1. **Date Purchased**: This column displays the date a case was purchased by the organization.

2. **Expiration Date**: This is the date and time in which the purchase expires and access is no longer available.

3. **Location:** The location column identifies where a case was filed.

4. **Case Number**: Each case is assigned a case number as it relates to a selected court location. Case numbers in this table display as hyperlinks. View case history by clicking on the case number hyperlink.

   a. Click the file folder icon and the system will take you to the file into this existing case. The system will pre-populate the county and case number fields.

   b. Click the plus icon to place a case into monitored status. The case is added to the monitored cases table, but now displays with a minus icon.

      i. Click the minus icon, and the case is removed from monitored status and redisplays with a plus icon.
      ii. If the purchase expires and is still being monitored, the case will display on the monitored case tab, but if the user tries to access the case, they will need to repurchase in order to view again.

5. **Case Caption:** This column displays the caption as accepted or created by the court. Case caption in this table display as hyperlinks. View case information by clicking on the case caption hyperlink.

FILING ID

The Filing ID screen displays detailed information about all e-filing transactions within a case. The screen includes the following information sections:

- Filing ID Basic Information
- Document Information
- Service Information

FILING ID – HOW TO FIND

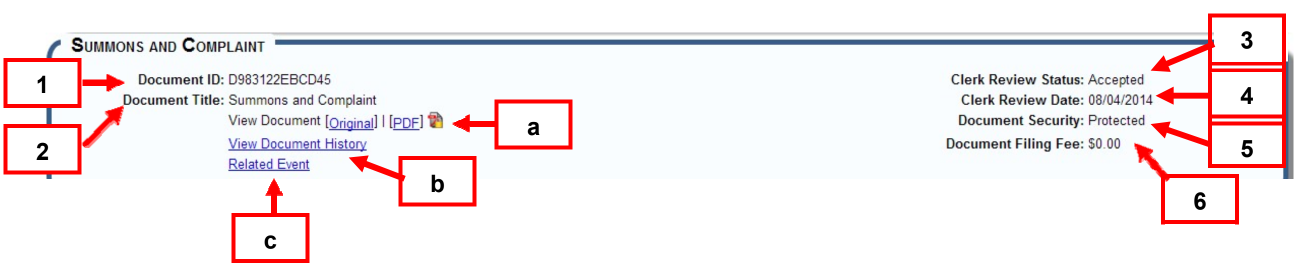
Click on a Filing ID link in Alerts, Recent Actions, Search Results or Case History.

FILING ID BASIC INFORMATION:

1. **Case Number:** Each submitted case is assigned a case number as it relates to a selected court location. Click the case number hyperlink to access the Case History/Register of Actions screen.
2. **Case Caption:** Prior to Clerk Review, N/A displays in Case Caption field. After the case is accepted in Clerk Review case caption displays as a link. View case information by clicking on the case caption link.
3. **Location:** Identifies the court location where a case was filed.
4. **Filing ID**: Is a unique number that identifies a single e-filing transaction consisting of one or more e-filed documents.
5. **Filing Date:** Identifies the calendar date when the e-filing was submitted.
6. **Fees Assessed:** Total fees assessed for the filing.
7. **Filing Party(ies):** The party(ies) filing the document(s).
8. **Filing Organization:** The name of the organization submitting the filing.
9. **Filing Authorized By:** The attorney of record or filing attorney.
    A. Click the file folder icon and the system will take you to the file into this existing case. The system will pre-populate the county and case number fields.
    B. Click the plus icon to add this case to the "Monitored Cases" tab.

For more information, see Monitored Cases.

DOCUMENT INFORMATION



1. **Document ID:** Is a unique number assigned to a single e-filed document.
2. **Document Title:** The title of a filed document.
    a. View Document: Click the hyperlink to display the original or PDF document. Click on the icon to view the redacted version of the document.

b. View Document History: Click the hyperlink to open a new window displaying further document details. (See View Document History)

c. Related: If the document has a document related, click on the hyperlink to view the related document.

3. **Clerk Review Status:** Serve only documents display as "Served." All other submitted documents prior to the clerk review display the status as "submitted." After clerk review, the "submitted" status documents reflect either "Accepted," or "Rejected.

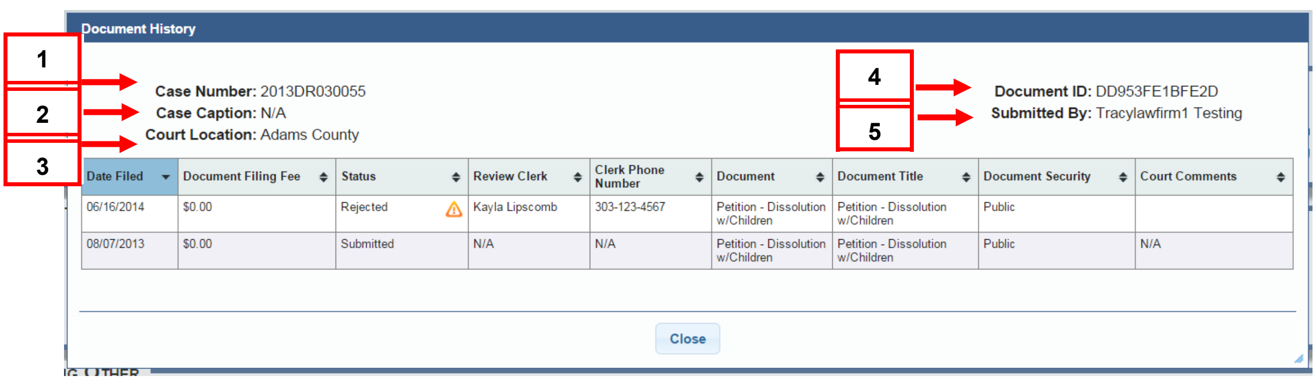
4. **Clerk Review Date:** In this field, the date displays as N/A until it is reviewed by the e-filing review clerk. After the document goes through the clerk review process, a valid date displays reflecting the clerk review date.

5. **Document Security:** Prior to clerk review, the document security displays the selected security setting entered in the e-filing system by the filing party. After clerk review, the setting may change depending on the document, and will then display the new setting (if any) entered by the review clerk.

6. **Document Filing Fee:** Identifies the statutory filing fee for the document.

View Document History

Click this link to view document details.



Date Filed	Document Filing Fee	Status	Review Clerk	Clerk Phone Number	Document	Document Title	Document Security	Court Comments
06/16/2014	$0.00	Rejected	Kayla Lipscomb	303-123-4567	Petition - Dissolution w/Children	Petition - Dissolution w/Children	Public	
08/07/2013	$0.00	Submitted	N/A	N/A	Petition - Dissolution w/Children	Petition - Dissolution w/Children	Public	N/A

1. **Case Number:** Each submitted case is assigned a case number as it relates to a selected court location.

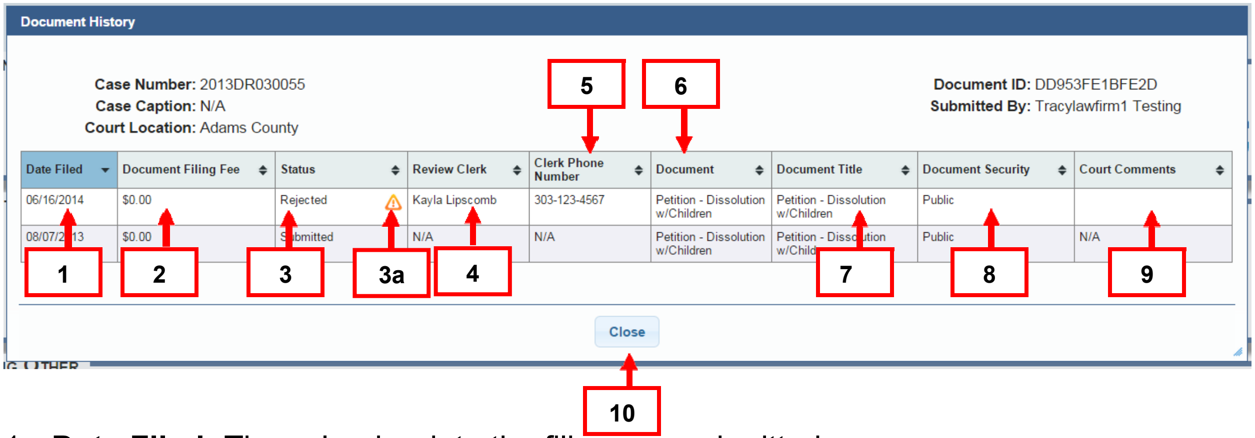
2. **Case Caption:** Displays the names of the parties for cases accepted through the court clerk review process. Displays as N/A if the case is in submitted status.

3. **Court Location:** Identifies the court location where a case was filed.

4. **Document ID:** Is a unique number assigned to a single e-filed document.

5. **Submitted by:** The user submitting the filing.

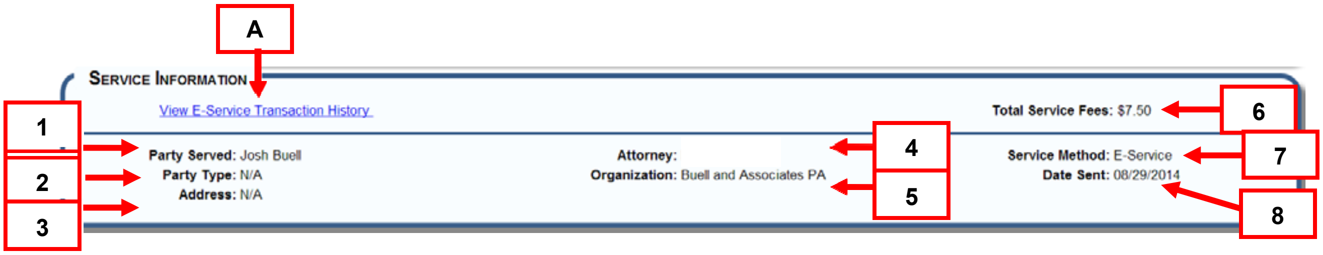
DOCUMENT HISTORY TABLE



1. **Date Filed:** The calendar date the filing was submitted.
2. **Document Filing Fee**: Identifies the statutory filing fee for the document.
3. **Status:** Serve only documents display as "Served." All other submitted documents prior to the clerk review display the status as "Submitted." After clerk review, the "submitted" status documents reflect either "Accepted," or "Rejected."
    a. The information triangle icon identifies a document as rejected. Hover over the information icon, or click it for an enlarged view.
4. **Review Clerk:** The name of the review clerk at the court.
5. **Clerk Phone Number:** If a document is rejected during the clerk review process, the clerk must provide a contact phone number.
6. **Document:** The document identifies the document name as listed in the court's case management system.
7. **Document Title:** The title of a filed document.
8. **Document Security**: Prior to clerk review, the document security displays the selected security setting entered in the e-filing system by the filing party. After clerk review, the setting may change depending on the document, and will then display the new setting (if any) entered by the review clerk.
9. **Court Comments:** Comments if any are entered by the court review clerk.
10. **Close:** Clicking the button closes the window and returns the user to the Filing ID screen.

Service Information

If a **Service Information** section displays on the Filing ID page, it means the user filed a document in an existing case and requested service.



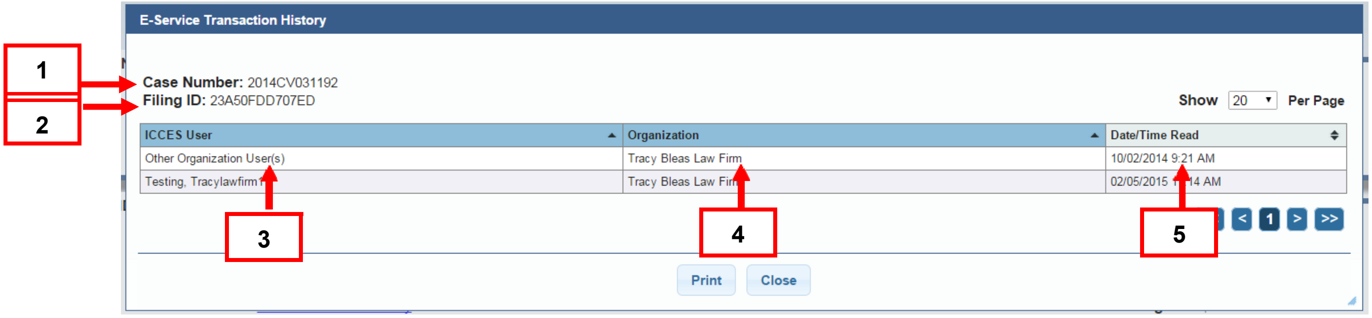
SERVICE INFORMATION: (Note: File into Existing Case Display only)

A. **View E-Service Transaction History**: Click the hyperlink in the Service Information section to view e-service transaction information.
   See [E-Service Transaction History.]

1. **Party Served:** The named served recipient.
2. **Party Type:** The party type is plaintiff, petitioner, defendant, respondent etc.
3. **Address:** The address of the served party entered for service.
4. **Attorney:** The name of the attorney served on behalf of a party they represent. N/A displays if person is not an attorney.
5. **Organization:** The name of the organization for the attorney being served. N/A displays if served person is not part of an organization.
6. **Service Fee**: There are service fees from the e-filing system and the mail vendor for US Mail, Certified Mail and E-Service.
   - US Mail and Certified Mail fees are assessed per standard fees from the US Postal Service, and include service fees from the e-filing system and the mail vendor.
   - E-Service Fees are assessed by the e-filing system per Filing ID.
   - There is one e-service fee per Filing ID no matter how many recipients are being e-served.
7. **Service Method:** Indicates US Mail, Certified Mail or E-Service.
   - E-Service Transaction History link displays for any e-served recipient.
8. **Date Sent:** This information is sent to the e-filing system from the mail vendor and identifies the date the documents were mailed via the US Postal Service.
   - Submitted documents are scheduled for mailing the next business day based on US Postal Service business days.
   - E-service takes place immediately.

E-SERVICE TRANSACTION HISTORY WINDOW

If a recipient was e-served, view details by clicking the View E-Service Transaction History link in the Filing ID Service Information section



1. **Case Number:** Each submitted case is assigned a case number as it relates to a selected court location.

2. **Filing ID**: Is a unique number that identifies a single e-filing transaction consisting of one or more e-filed documents.

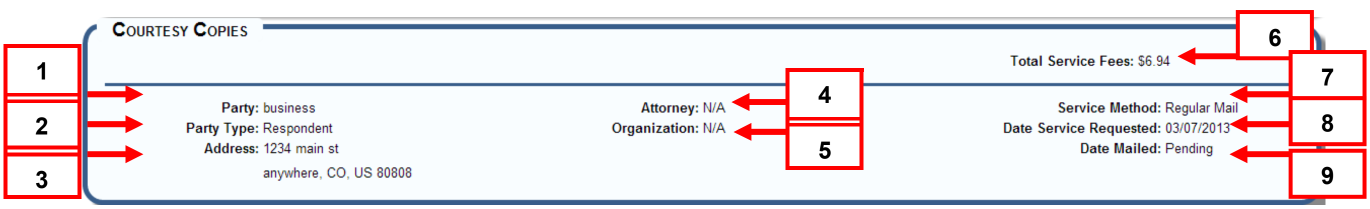
3. **User:** The user that has viewed the Alert.

4. **Organization:** The name of the organization for the served recipient. N/A displays if served person is not part of an organization.

5. **Date/Time Read:** Pinpoints the date/time the filing was opened by recipient.

COURTESY COPIES

If a **Courtesy Copies** section displays on the Filing ID page, it means the filing was a new case, and the user asked the system to provide courtesy copies to select recipients.



1. **Party:** The named recipient for the courtesy copy.

2. **Party Type:** The party type is plaintiff, petitioner, defendant, respondent etc.

3. **Address:** The address of the recipient entered into the system by the user.

4. **Attorney:** The name of the attorney served on behalf of a party they represent. N/A displays if served person is not an attorney.

5. **Organization:** The name of the organization for the served recipient. N/A displays if served person is not part of an organization.

6. **Service Fees:** Fees incurred for service of courtesy copy.

7. **Service Method:** Indicates US Mail, Certified Mail or E-Service.

8. **Date Service Requested:** Date filing party requested pleading be served for courtesy copy.

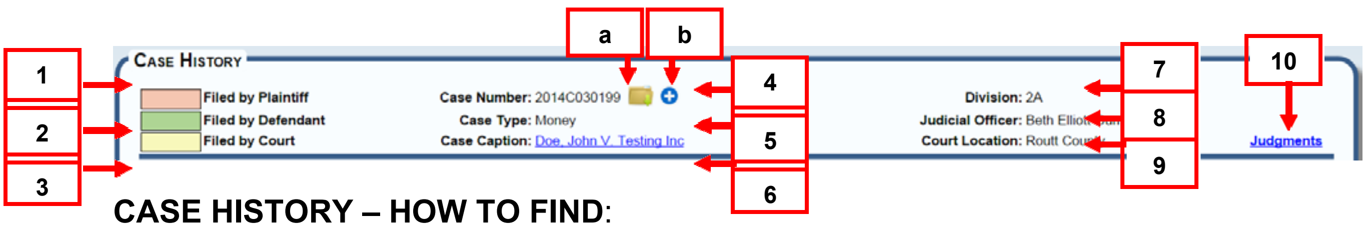
9. **Date Mailed:** Date pleading was mailed by mail vendor.

CASE HISTORY / REGISTER OF ACTIONS / SERVE ONLY DOCUMENTS

Basic case information displays on the Case History / Register of Actions / Serve Only Documents screen.

The Case History section view displays a color coding chart for filing party. Case number, case type and case caption for a case display in the center, and the assigned division, judicial officer and court location are on the right.

Top Section View:



CASE HISTORY – HOW TO FIND:

Click on a *Case Number* link in any table (Alerts, Recent Actions, Cases, Search Results or the Filing ID screen).

1. **Color Code - Coral –** Filed by Plaintiff, Petitioner, Applicant, Appellant, etc.

2. **Color Code - Green –** Filed by Defendant, Respondent, Opposer, Appellee etc.

3. **Color Code - Yellow –** Filed by Court.

4. **Case Number:** Each submitted case is assigned a case number as it relates to a selected court location.

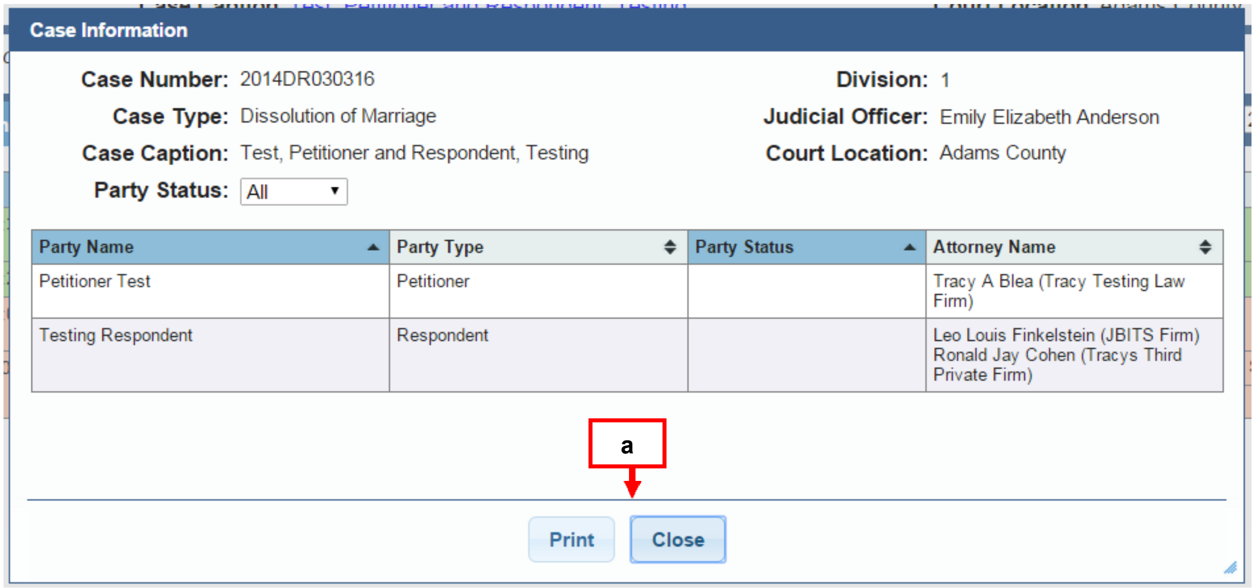
   a. Click the file folder icon. The File Builder opens so you can file into this existing case.

   b. Click the plus icon to add this case to the "Monitored Cases" tab.

   For more information, see Monitored Cases.

5. **Case Type:** The case type displays a case type as it relates to a case class. Ex., a breach of contract is a type of case in the civil case class.

6. **Case Caption:** This displays the caption as accepted or created by the court. Click the hyperlinked case caption to view case information.



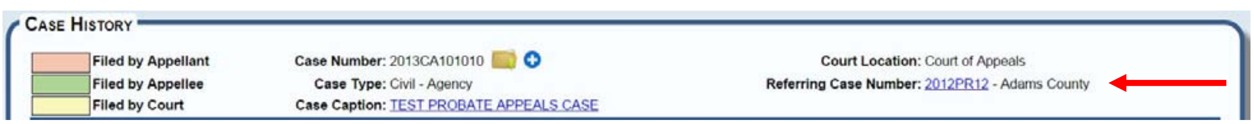
a. Click "Close" to exit or to print case information click "Print".

7. **Division:** The division within a court location where the case is assigned.

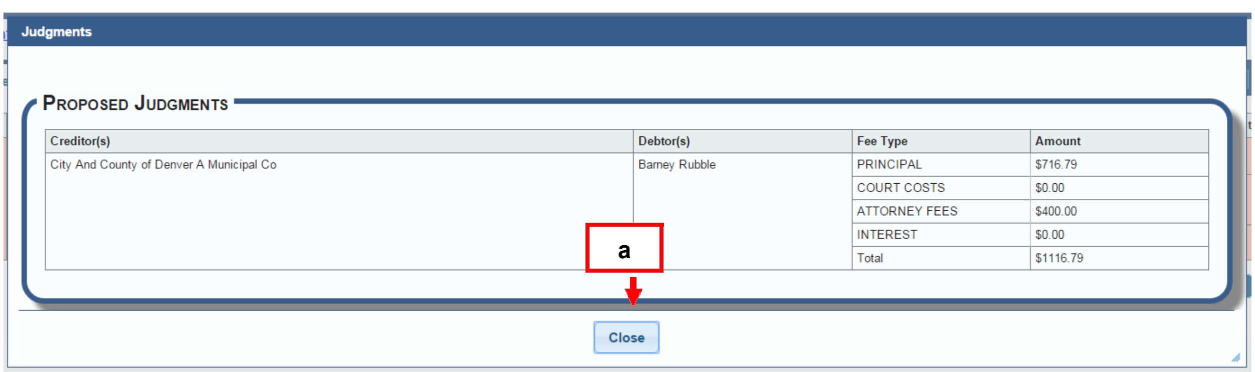
8. **Judicial Officer:** The judicial officer assigned to the case.

9. **Court Location:** The location identifies where a case was filed.

If the case is an appeal case with a referring trial court or other type of referring location, will display in the case history information in the right corner



10. **Judgments:** Click the judgment hyperlink to display judgment details.

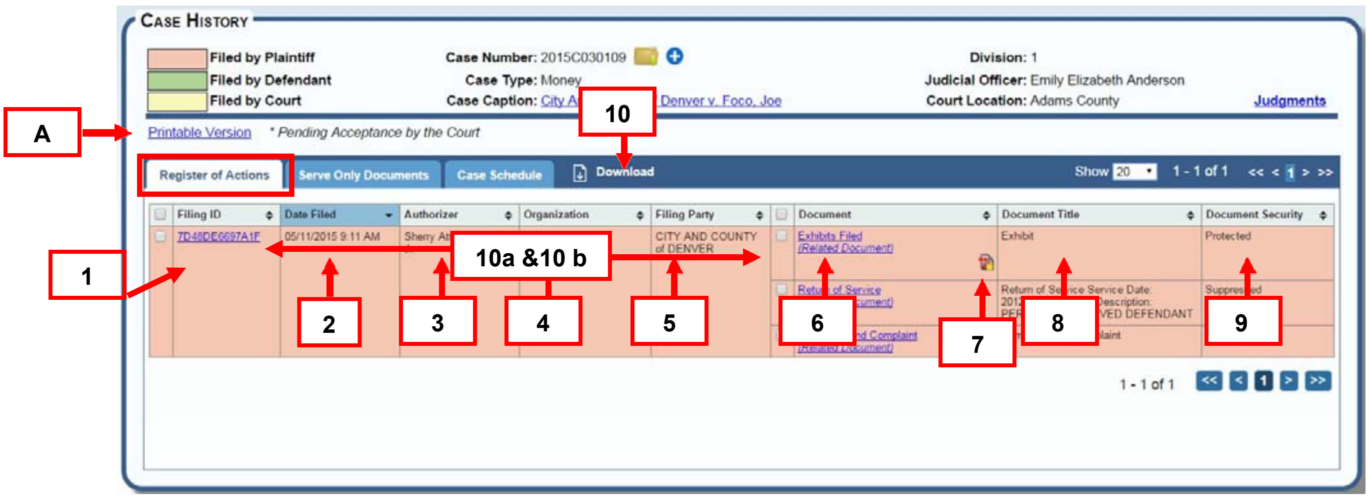


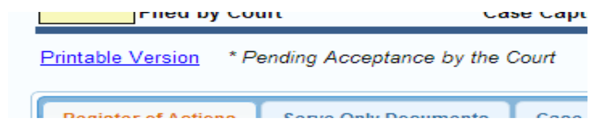
a. Click "Close" button to exit and return to case history.

REGISTER OF ACTIONS / SERVE ONLY DOCUMENTS

The bottom section of the screen has three tabs, i.e. Register of Actions, Serve Only Documents and Case Schedule. The Register of Actions view displays general case activity.

Bottom Section View:





REGISTER OF ACTIONS – HOW TO FIND:

Click on a <u>*Case Number*</u> link in any table (Alerts, Recent Actions, Cases, Search Results, Scheduled Filings or Filing ID screen).

A. **Printer Friendly Version**: Click this and a printable version of the Register of Actions displays. Select Print from the print window.

1. **Filing ID**: Is a unique number that identifies a single e-filing transaction consisting of one or more e-filed documents. *If there is an asterisk next to the filing ID, this indicates that the filing is pending acceptance by the court.*

2. **Date Filed:** Identifies the calendar date when the filing was submitted.

3. **Authorizer:** The attorney of record or filing attorney authorizing the filing.

4. **Organization:** The name of the organization submitting the filing.

5. **Filing Party(ies):** The party(ies) filing the document(s).

6. **Document:** The document identifies the document name as listed in the court's case management system.

7. **Redacted Document Icon:** This icon will display only if the original document that was filed has been redacted and uploaded by the court. Click on the icon to view the redacted version of the original document.

8. **Document Title:** The title of a filed document.

9. **Document Security:** Displays suppressed, public, sealed or protected per clerk review of the document.

10. **Download Button**: This works in conjunction with the checkboxes located to the left of both the filing ID and each individual document. Any downloaded documents will be sent to the "My Downloads" queue.

    a. To download a single e-filing transaction which may consist of one or more e-filed documents, select the checkbox to the left of the filing ID. This will automatically check all the documents within that filing. Press the "Download Document(s)" button.

    b. To download a specific document(s) select the checkbox to the left of the "Event" itself and press the "Download Document(s)" button.

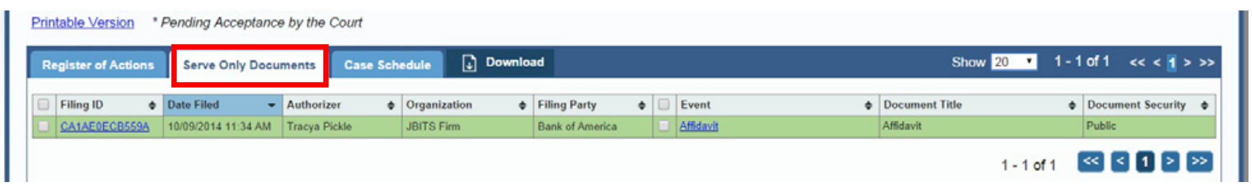
SERVE ONLY DOCUMENTS

The Serve Only Documents view displays case activity for serve only documents.

SERVE ONLY DOCUMENTS – HOW TO FIND:

Click on a *Case Number* link in any table (Alerts, Recent Actions, Cases, Search Results, Scheduled Filings or Filing ID screen) and then select the Serve Only Documents tab.

(Columns and Function are identical to the Register of Actions tab)



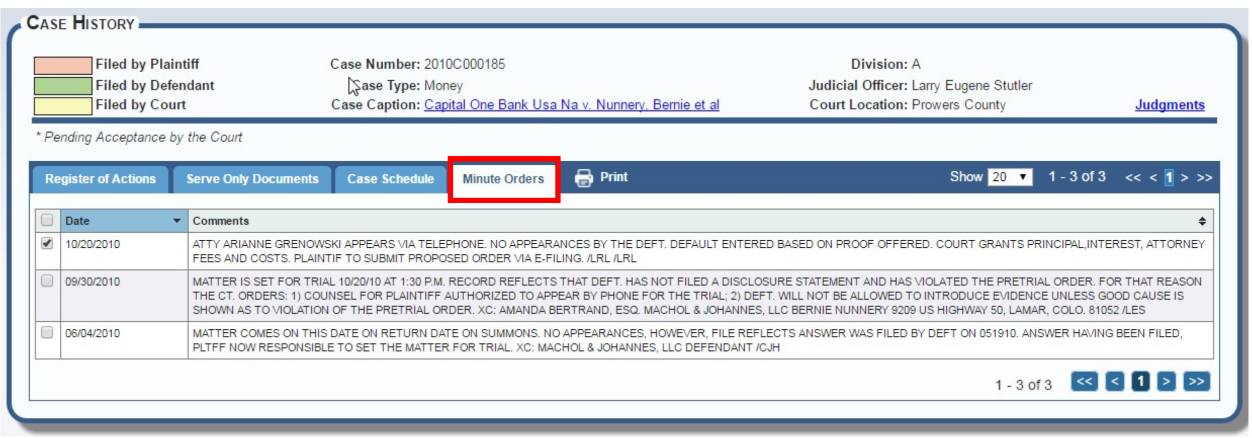
CASE SCHEDULE

The Case Schedule view displays hearing(s) that are scheduled for this specific case.

1. **Date of Hearing**: Date hearing is scheduled to take place.
2. **Time of Hearing:** Time hearing is scheduled to take place.
3. **Location:** Court location hearing is scheduled to take place.
4. **Courtroom:** Courtroom in the location hearing is scheduled to take place.
5. **Type:** Identifies the type of hearing scheduled with the Court. Ex: Jury Trial
6. **Status:** Status of hearing, blank indicates hearing is pending.
7. **Judicial Officer:** Judicial Officer currently scheduled to hear case.
8. **Length/Unit:** Length of time case is scheduled to last, i.e. 1 H (hour), 1 D (day)

MINUTE ORDERS

E-File users have requested the ability to view minute orders in cases. Minute Orders will now be available in the Case History screen for attorneys who represent a party on the case. Minutes orders can be found in the Minute Order tab of the Case History screen. Attorneys and their staff will have the ability to print individual minute orders.



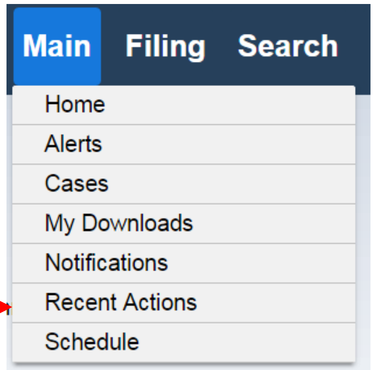
* To print individual minute orders click in the box or to select all check mark the box at the top. Once you've made your selections click the print icon next to the minute orders tab.

RECENT ACTIONS

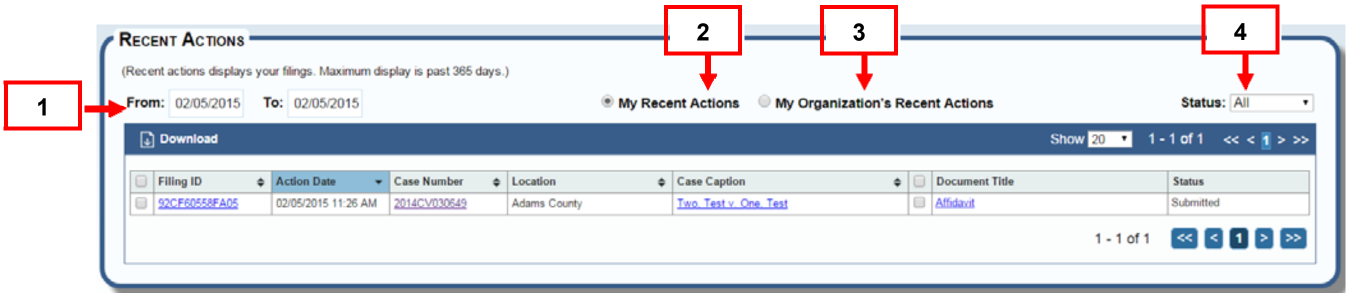
Recent Actions shows e-filing activity from the past twenty-one (21) days.

Recent Actions – How to Find

From the Home screen, click **Main** tab and select "Recent Actions."



RECENT ACTIONS – FILTERS



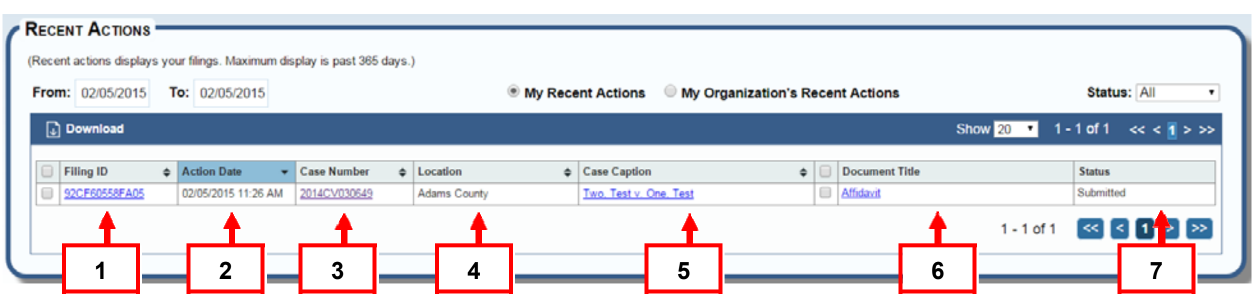
1. **From:** and **To:** The date boxes provide a default of 21 days for the date range. This can be changed to display up to 365 days of filings. Click inside either date box to select a specific date from the pop-up calendar.

2. **My Recent Actions**: Click to select. Screen displays recent actions for the logged in user.

3. **My Organization's Recent Actions**: Click to select. Screen displays recent actions for all users within an organization.

4. **Status:** Indicates the status before and after submitted to the court. Status can include Accepted, Rejected, Served, and Submitted.

RECENT ACTIONS – TABLE COLUMN



1. **Filing ID**: Is a unique number that identifies a single e-filing transaction consisting of one or more e-filed documents. Click the hyperlink to view Filing ID details.

2. **Action Date:** This column identifies the date and time the transaction took place.

3. **Case Number**: Each case is assigned a case number as it relates to a selected court location. Case numbers that have been accepted by the court's review clerk display as hyperlinks. Rejected or submitted case numbers are not hyperlinked. View case history by clicking on a case number hyperlink. Case history is not available for cases without a hyperlink (rejected or submitted).

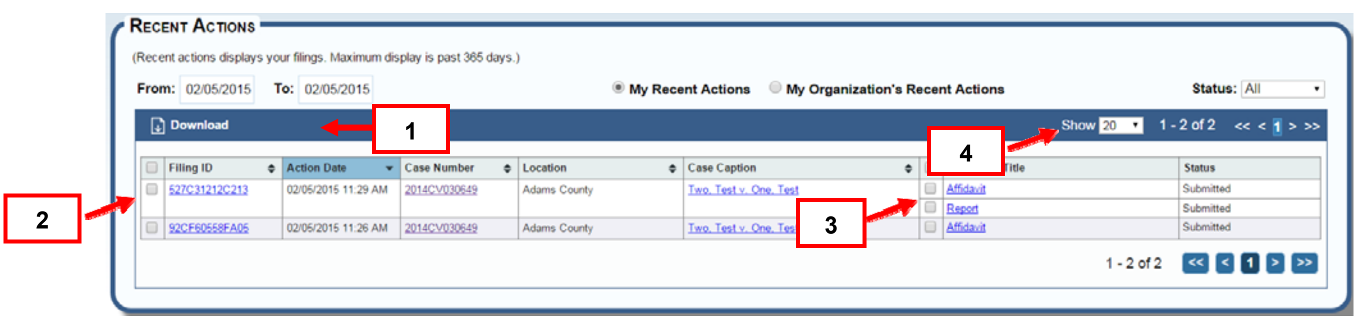
4. **Location**: This column identifies the court location where a case or document was e-filed.

5. **Case Caption:** This displays the caption as accepted or created by the court. Click the hyperlinked case caption to view case information.

6. **Document Title:** The document event identifies the document name as listed in the court's case management system.

7. **Status**: This is a current status for all filings submitted through the e-filing system.
   - Status choices display as "Accepted" or "Rejected" after the court has reviewed the filing.
   - "Submitted" displays for filings that have not gone through the court's clerk review process.
   - If the filing is a serve-only, the status shows "Served."

RECENT ACTIONS – Toolbar - Download



1. The "Download" option allows the user to download one or more documents from the Recent Actions Screen.

2. To download documents in an entire filing, select the checkbox next to the Filing ID. All the documents within that filing ID below the Event column will auto check. Press the "Download" button (1). Your request will be sent to the "Pending" queue of the "My Downloads" screen.

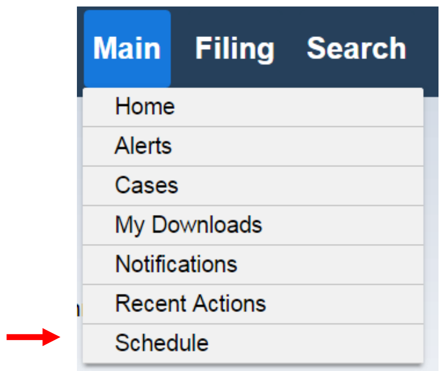
3. To download specific documents from one or more filing, select the checkbox next to document listed below the “Document Title” column and then select the “Download Document(s)” option.

4. **Show**: View 20, 50 or 100 cases per page. Click the arrow and select a viewing preference.

SCHEDULE

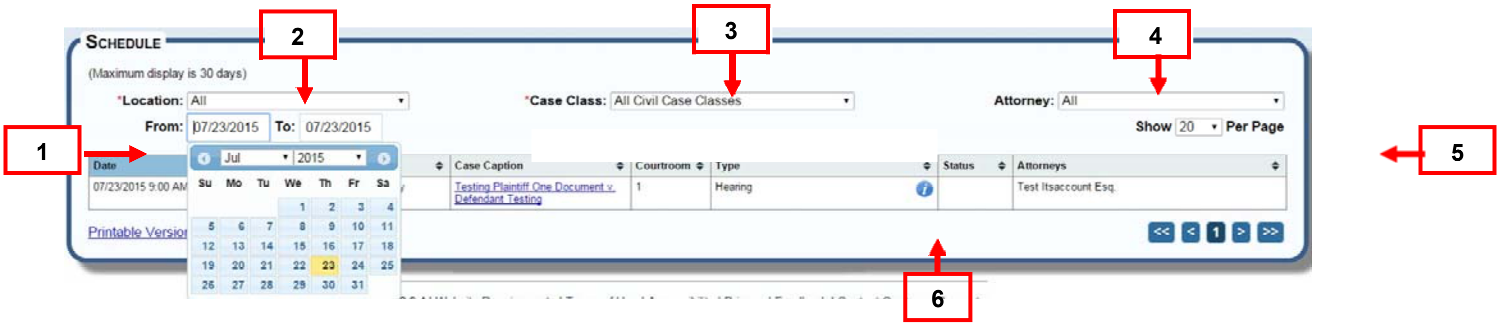
Upcoming court dates for e-filed cases display through the “Schedule” hyperlink. The default display is 7 business days however the maximum schedule display is 30 days.

Schedule – How to Find



From the Home screen, click **Main** tab and select “Schedule.”

SCHEDULE – FILTERS



1. **From: and To**: These date boxes display a maximum 30-day date range schedule view. Click inside the “To” date box to select a date range 30 days or less from the pop-up calendar.

2. **Location**: Find a location to view a schedule for any or all court locations. Click the arrow, highlight and select.

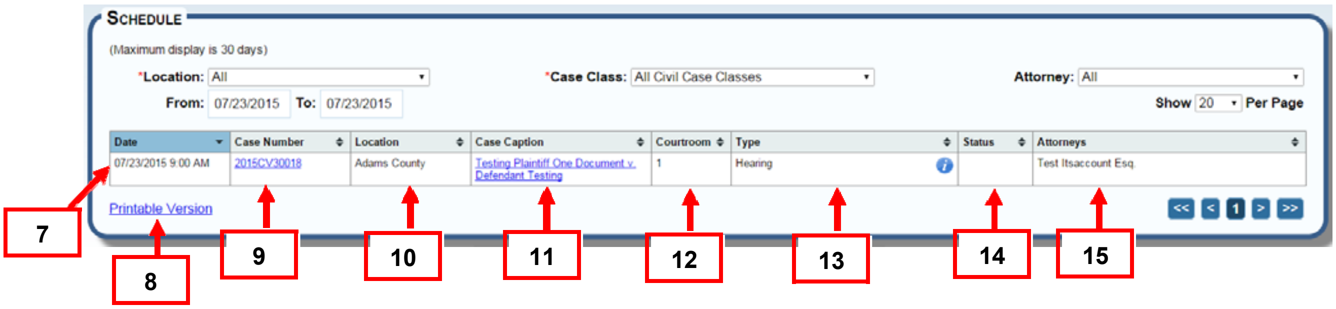
3. **Case Class:** Filter from the box for a specific case class or classes. Click the arrow for a list of cases classes and select.

4. **Attorney:** This box displays all attorneys within an organization. Click the arrow for a list of attorneys. Highlight and click to select.

5. **Show**: View 20, 50 or 100 cases per page. Click the arrow and select a viewing preference.

6. **Informational Icon**: This will display if the court has added any additional information regarding the scheduled event.

SCHEDULE – TABLE COLUMNS



7. **Date & Time:** This column displays a court date and time.

8. **Printable Version:** This will allow a user to print a schedule of court dates for the specific date range selected.

9. **Case Number:** The assigned case number for the court date displays in the case number column. Case numbers display as hyperlinks. View case history by clicking on the case number hyperlink.

10. **Location:** Shows the court location.

11. **Case Caption:** Displays the case caption of the case for the scheduled event.

12. **Courtroom:** Shows the courtroom for the scheduled event.

13. **Type:** Displays the type of scheduled event.

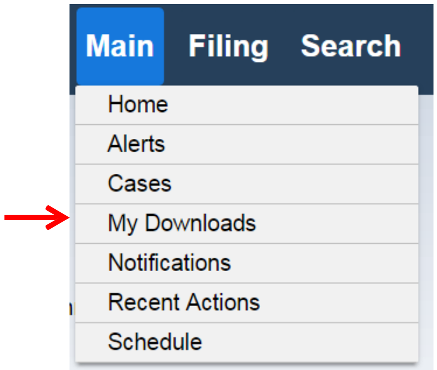
14. **Status:** The status column displays an outcome for a court date (hearing).
    - o Ex. When a hearing is held, the court updates the status and “Held” is displayed in the status column. When a hearing is continued, the court updates the status and “Continued” is displayed in the status column.

15. Attorney: Displays the name(s) of the attorney(s) assigned to the case.

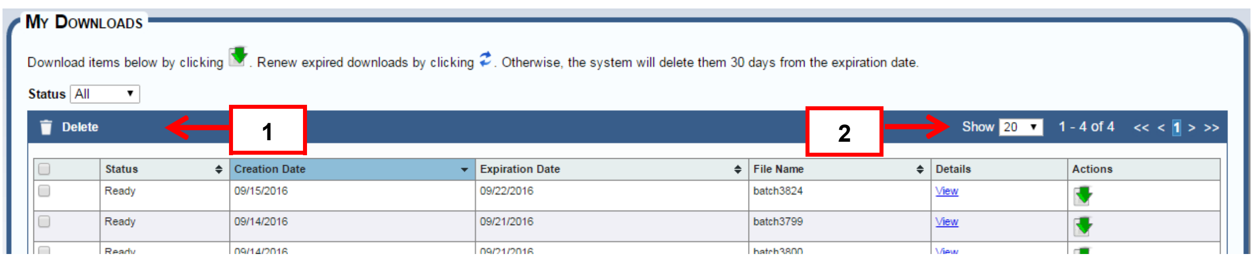
MY DOWNLOADS

My Downloads page displays requested downloads from Alerts, Recent Actions, Case History and Advanced Search results. A user can view Pending, Ready for Download and Expired requested downloads.

From the Home screen, click **Main** tab and select “My Downloads.”



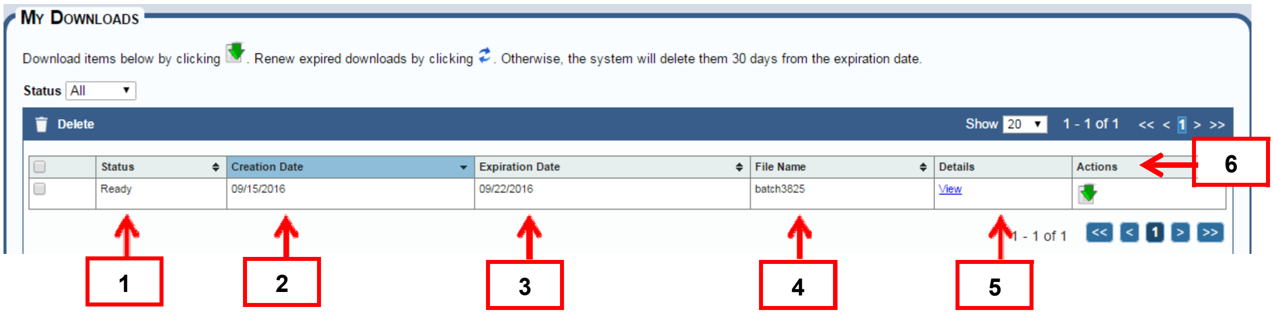
MY DOWNLOADS – FILTERS



1. **Status Options:** Defaults to “All”.
    - o Expired: Request for documents download has expired, but can be re-requested within 30 days by selecting the refresh button. This is so the user does not have to make a second request for the same information.
    - o Pending: Requested documents, not yet ready to download.
    - o Ready: Requested documents ready to be downloaded.

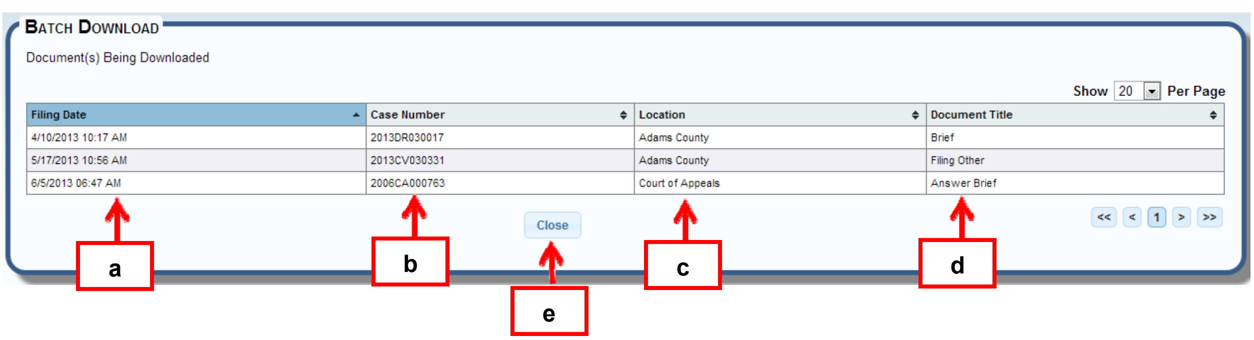
2. **Show**: View 20, 50 or 100 scheduled dates per page. Click the arrow and choose a viewing preference.

MY DOWNLOADS – TABLE COLUMNS, CANCEL BUTTON



Select checkboxes: Used in conjunction with “Delete” button on toolbar. Select a checkbox of download batch you wish to remove and then select the “Delete” button to remove.

1. **Status:** Indicates status of download; pending, ready or expired.
2. **Creation Date:** Date download requested.
3. **Expiration Date:** Date requested download Expires:
4. **File Name:** Automated batch number.
5. **Details:** Link to view what was requested in specific download.
   a. Filing Date of document requested.
   b. Case Number.
   c. Location.
   d. Document Title.
   e. Select close button to return to pending queue.

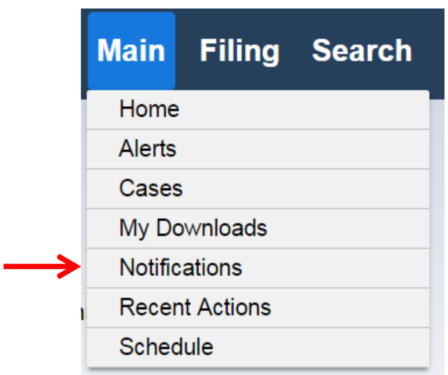


6. **Actions:** Icon to download/save requested batch.

NOTIFICATIONS

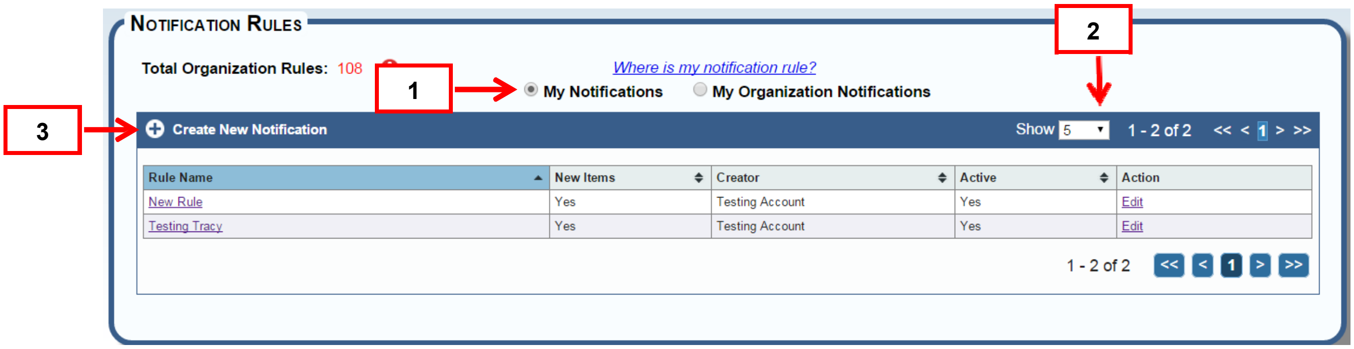
Notifications allows you to define a specific set of conditions—court location, case class, case type, or document type, among others— for the system to watch for and collect matching documents, and even trigger an e-mail to you if a document matching those conditions is filed. Court Location and Case Class are required in your rule definitions, but you must also designate at least one other definition for the system to observe from the remaining options (Case Type, Event Type, Document Title, Party, Attorney/Judicial Officer).

Each organization may set up to 30 rule sets without charge. To view the pricing model, go to:
https://www.courts.state.co.us/userfiles/file/Administration/ITS/EFiling/Pricing_Model_Sheet.pdf



From the Home screen, click **Main** tab and select "Notifications"

NOTIFICATIONS – NOTIFICATION RULES

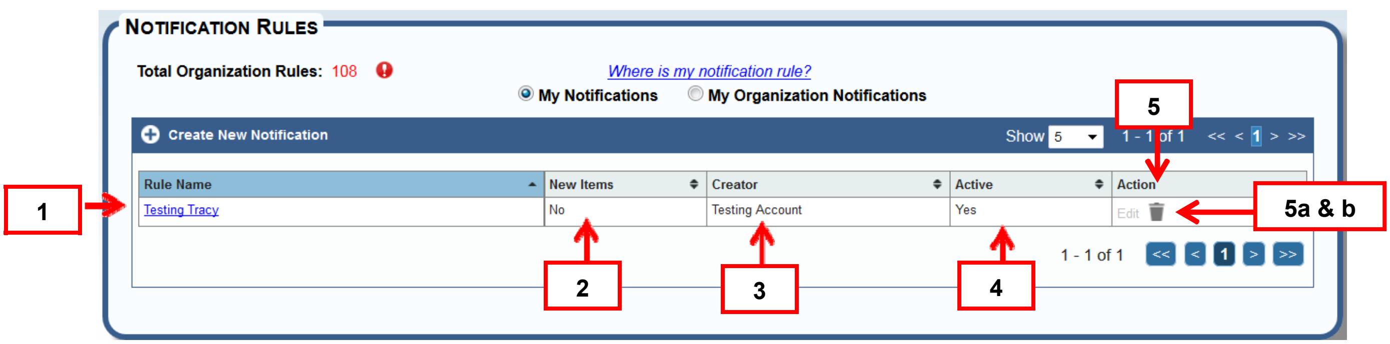


1. **My Notifications/My Organization's Notifications:** Defaults to My Notifications.

2. **Show**: View 5, 20, 50 or 100 notification rules per page. Click the arrow and choose a viewing preference.

3. **Create New Notification**: Opens a screen where you can define your notification rules.

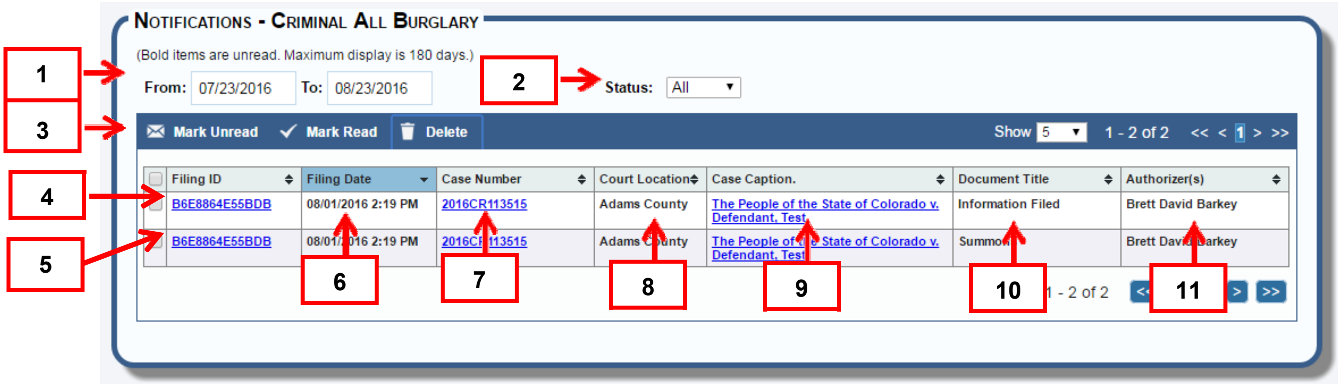
NOTIFICATION RULES – TABLE COLUMNS



1. **Name:** Unique name assigned by the notification rule creator. Click on a row to open a list of documents filed that match the rule.
   a. Rules that are not being shared with you will be inaccessible from this screen. An administrator or the creator of the rule can grant you access.
2. **New Items:** Indicates whether or not new items meeting your criteria have been filed.
3. **Creator:** The user who created the set of rules for that particular notification.
4. **Active:** Whether or not the rule is actively searching for incoming items.
5. **Action**:
   a. **Edit**: Allows the creator of the rule or an administrator to make changes to that rule.
   b. **Trash Can**: Allows the creator of the rule or an administrator to delete a rule.

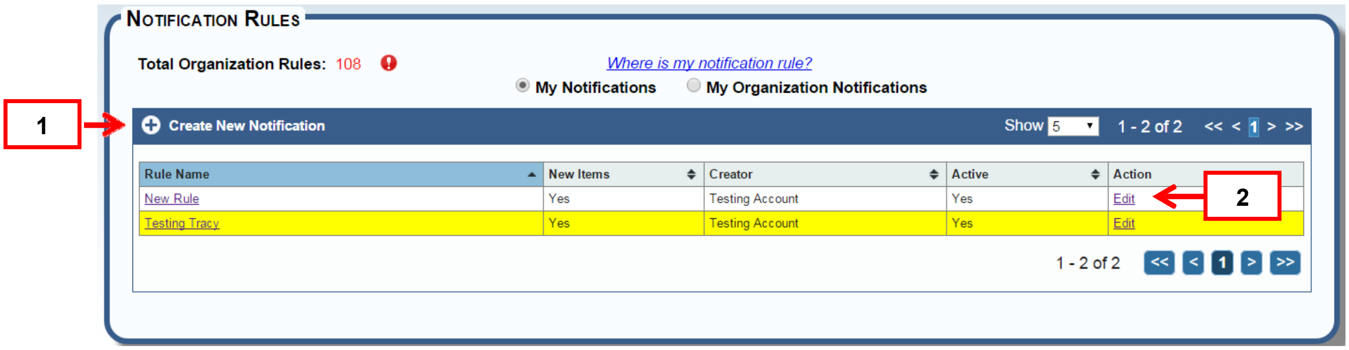
NOTIFICATIONS – LIST

Clicking on a row in the Notification Rules will open a list of documents filed that match the rule.



1. **Date Range:** Shows the most recent notification items within a 30-day range. Will display a maximum of 180 days.
2. **Status:** Filters the list to show All, Read, or Unread items only.
3. **Action Toolbar:** Allows the user to select a notification and select an action of Mark Unread, Mark Read or Delete. Also has the option to view of 5, 20, 50 or 100 items per page.
4. **Filing ID:** Is a unique number that identifies a single e-filing transaction consisting of one or more e-filed documents. Click to view detailed filing information.
5. **Checkboxes:** Select all items, or individually select items.
6. **Date:** Displays the date a document was filed.
7. **Case Number -- Notifications:** Each case is assigned a case number as it relates to a selected court location. Case numbers in this table display as hyperlinks. View the case history by clicking on the case number hyperlink.
8. **Location:** Displays where a case was filed.
9. **Case Caption:** Displays the caption as accepted or created by the court. Case caption in this table will display as a hyperlink. View party information by clicking on the case caption hyperlink.
10. **Document Title:** The title of a filed document.
11. **Authorizer:** The attorney of record, filing attorney or judicial officer authorizing the filing.

NOTIFICATIONS – CREATE

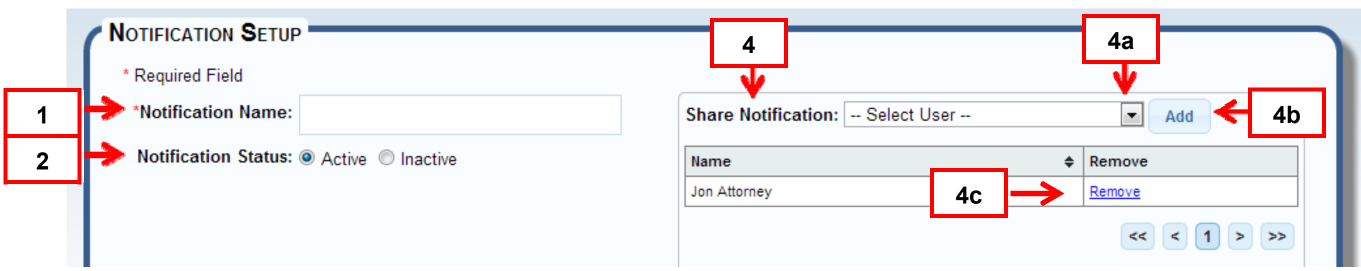


To establish the rules or conditions for which you would like the system to collect documents:

1. Click on the “Create Notification” button on the Notification Rules screen.

2. You can edit existing rules by clicking on the “Edit” link in the Action column.

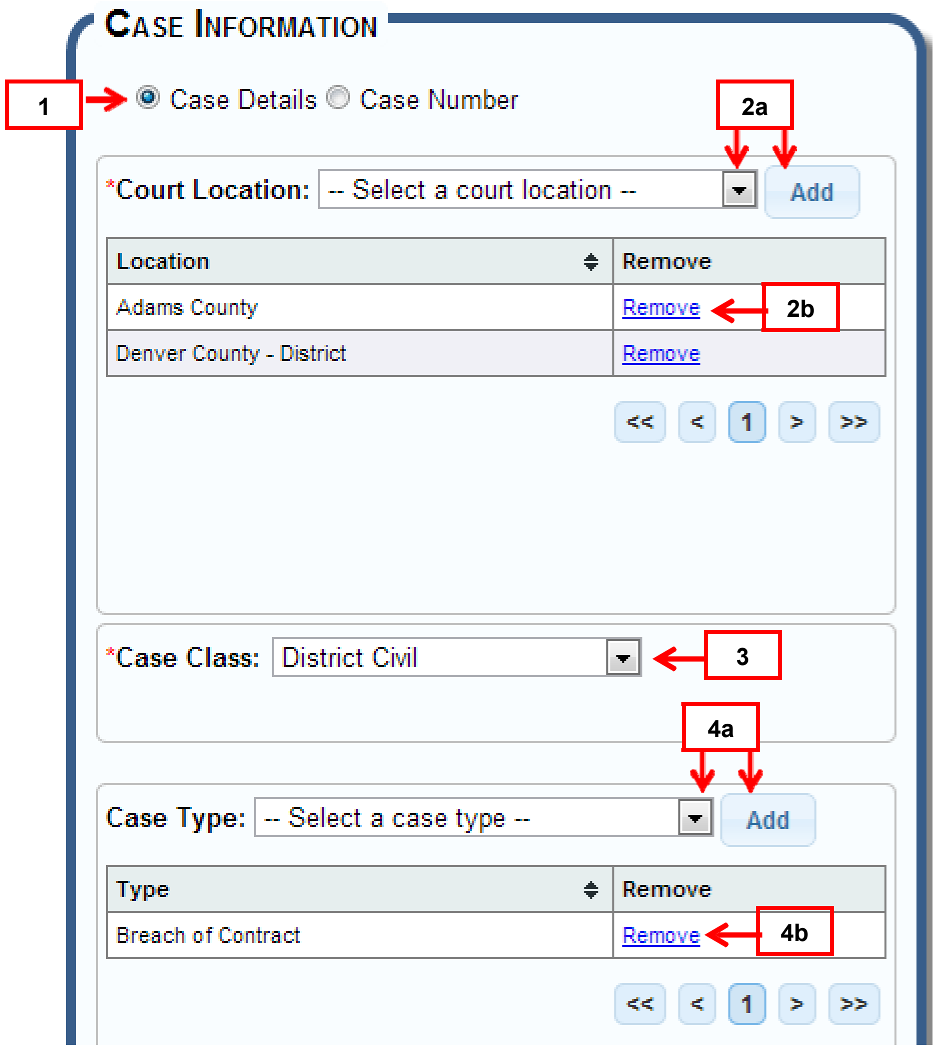
NOTIFICATIONS – SETUP



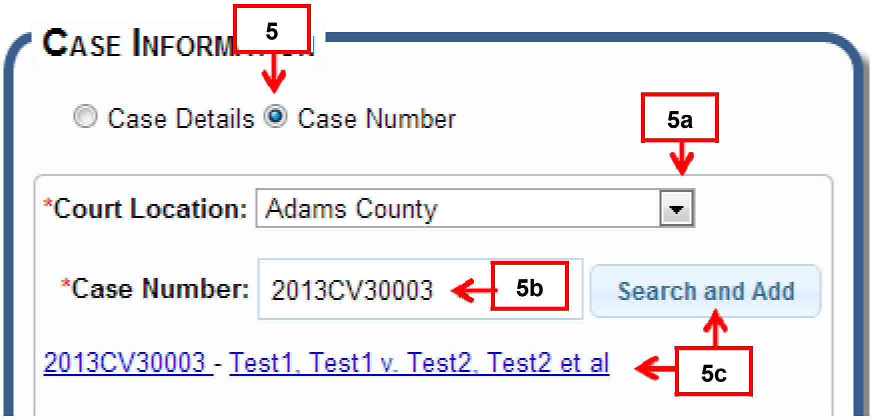
1. **Notification Name:** Enter a descriptive label for your set of rules.
2. **Notification Status:** Enable or Disable a rule set.
3. **Share Notification:** You may choose to share a rule set with users in your organization. You can repeat this process for multiple users.
    a. Select a user by pressing on the arrow.
    b. Press the “Add” button.
    c. Clicking on the “Remove” link will un-share the rule set from that user.

Case Information

You can tell the system to look for future documents based on information you have about a case or cases you are interested in using the Case Information section. The system will only look for documents in cases that specifically match your rules.



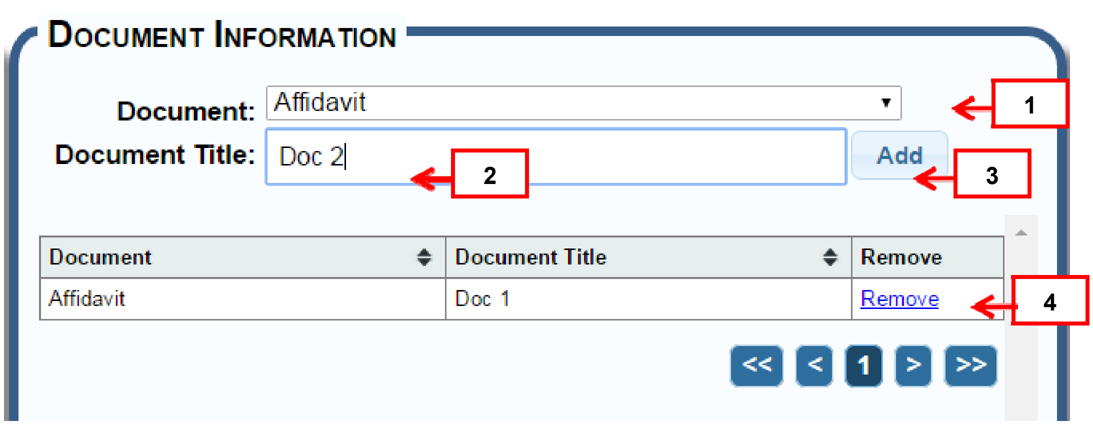
1. **Case Details:** This option allows you to set broad case-related rules regarding the type of documents you would like to be notified about.
2. **Court Location:** Select the court location(s) for your rule.
    a. Select a location by pressing on the arrow then pressing "Add."
    b. You may remove unwanted locations by clicking on the "Remove" link.
3. **Case Class:** Select a case class for your rule.
4. **Case Type:** Select the case type(s) for your rule.
    a. Select a location by pressing on the arrow then pressing "Add."
    b. You may remove unwanted locations by clicking on the "Remove" link.
5. **Case Number:** This option allows you to set a rule revolving around a specific existing case.



a. Set the court location by pressing the arrow.
b. Enter a valid case number and press the "Add" button.
c. If you have entered a valid case which you have access to, it will populate below the case number field as a link where you can view the case history by clicking on the case number or the case parties by clicking on the case caption.

Document Information

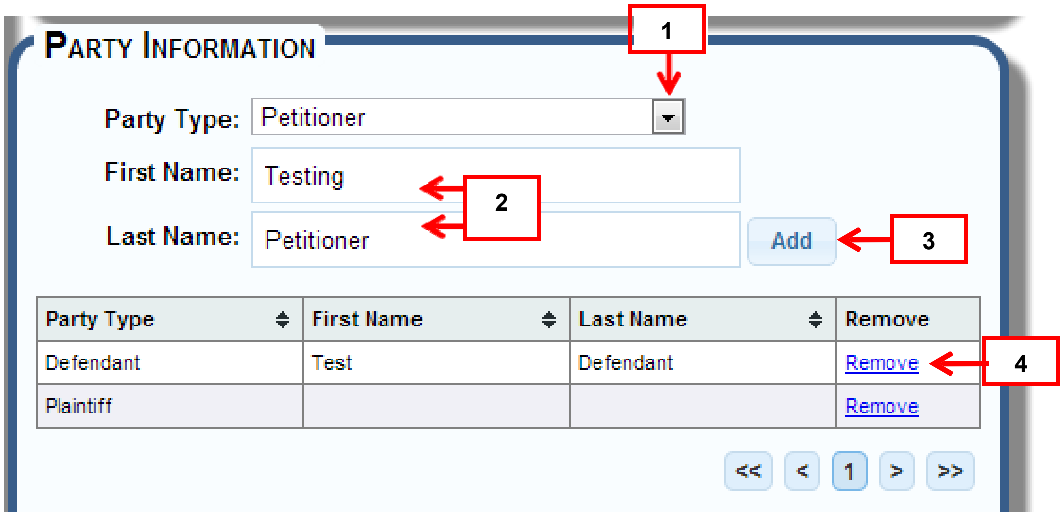
Additionally, you can further focus your rule set by adding document-specific conditions for the system to look out for. For example, selecting "Affidavit" will only notify you when an affidavit is filed. If you enter information for Document Title as well, such as "Doc 2," then the system will only notify you if an affidavit with the exact title "Doc 2" is filed.



1. **Event Type:** Select an event type by pressing on the arrow.
2. **Document Title:** *Enter the exact title of the incoming document.*
3. **Add:** Press the "Add" button to set your rule, which may consist of only an event type or document title or a combination. The rule will be displayed in the table below.
4. **Remove:** Remove a document rule by clicking on the "Remove" link.

Party Information

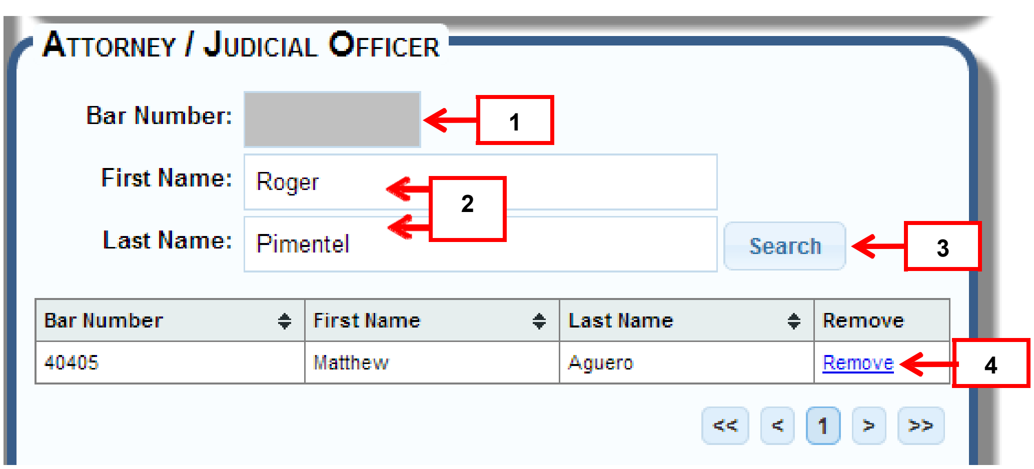
You can also continue to refine your rule set by adding case party-specific conditions in the Party Information section. The system will only notify you if the document is filed by the party(ies) you have defined in your rule.



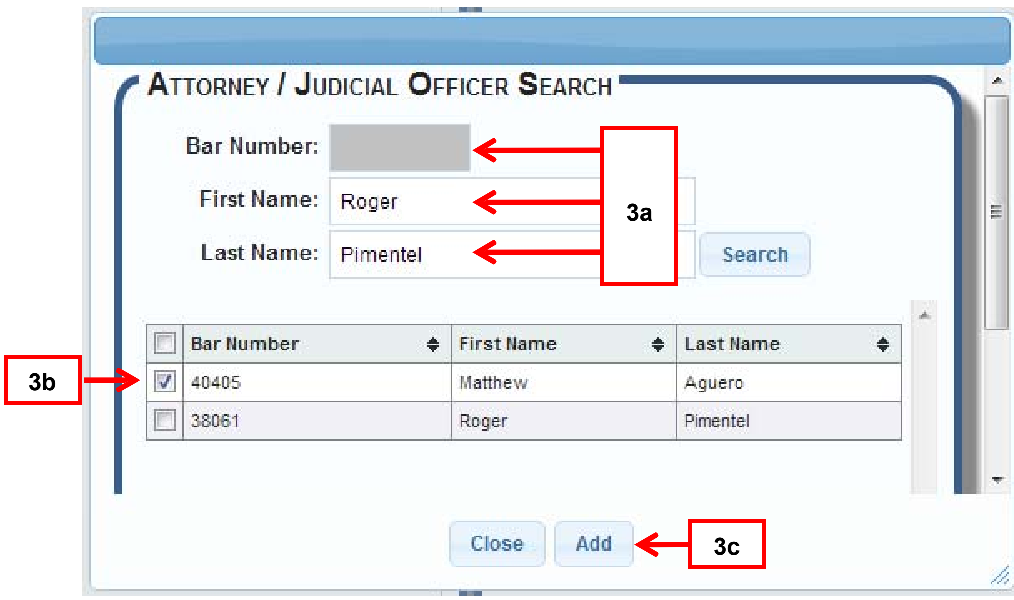
1. **Party:** Select the Party Type associated with a future filing by pressing the arrow.
2. **Last Name, First Name:** You may supplement the Party Type by adding the party's first and last name. If you choose to do so, you must enter at least a last name.
3. **Add:** Press the "Add" button to set your rule, which may consist of only a party type, or a last name, or last name and first name, or a combination of type and name. The rule will be displayed in the table below.
4. **Remove:** Remove a party rule by clicking on the "Remove" link.

Attorney/Judicial Officer

You can set your rule to search by a specific attorney or judicial officer by registration number or name.



1. **Bar Number:** Enter the bar number of the authorizing attorney or judicial officer of a future document.
2. **Last Name, First Name:** If you do not know the bar number of the authorizing attorney or judicial officer, you may enter a name instead. If you choose to do so, you must enter at least a last name.
3. **Search:** Once you have entered either a bar number or name, press the "Search" button to launch a results screen.



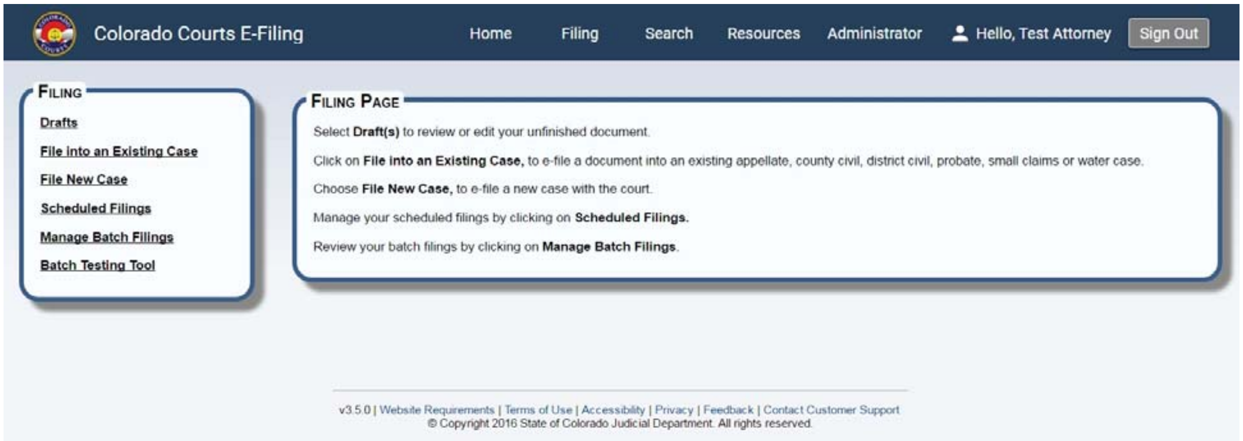
   a. You can alter your attorney/judicial officer search terms on the search screen.
   b. You can select multiple authorizers from the list using the checkboxes.
   c. Press "Add" to set your rule, which will be displayed in the table on the previous screen.
4. **Remove:** Remove an attorney/judicial officer rule by clicking on the "Remove" link.

Once you have completed setting or editing your rules, press the "Save" button at the bottom of the screen to establish your rule set, or any changes you have made. You may also delete an existing rule from this screen.

FILING

The “Filing” page displays hyperlinks for Drafts, File into an Existing Case, File New Case and Scheduled Filings from the page menu.

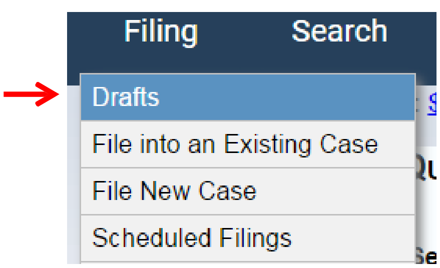
Registered batch file organizations have a Manage Batch Filing hyperlink on the Filing page menu.



DRAFTS

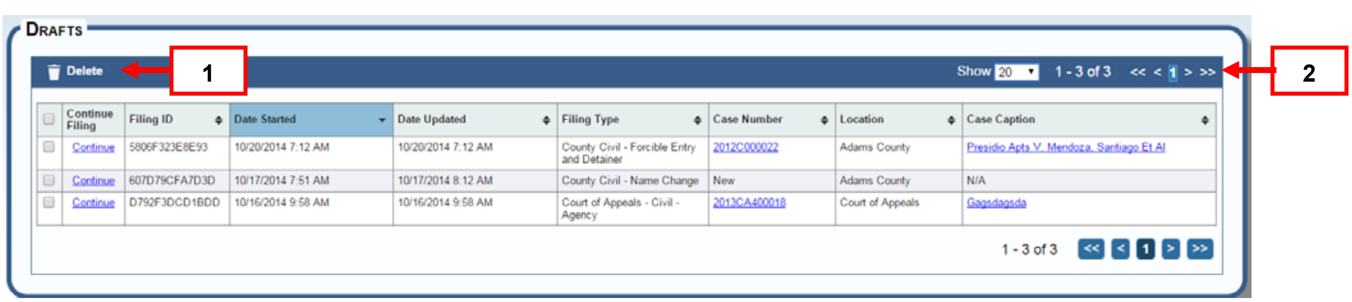
The Drafts screen displays a table of unfinished e-filing activity. Any unfinished filing is automatically saved by the system and displays in the Drafts screen.

DRAFTS – HOW TO FIND



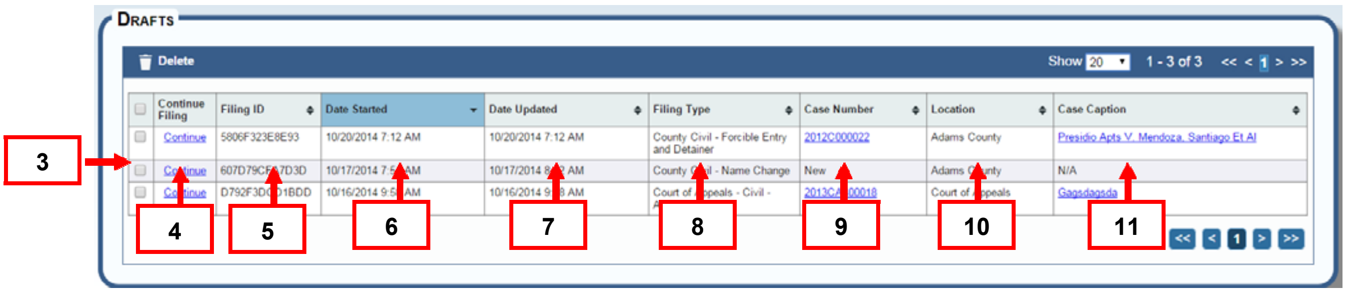
Hover over the **Filing** tab to choose the Drafts menu option.

DRAFTS – TOOLBAR



1. **Delete Button:** Allows user to delete existing drafts. Works in conjunction with the check boxes.
2. View 20, 50 or 100 scheduled dates per page. Click the arrow and select a viewing preference.

DRAFTS – TABLE COLUMN



3. **Check Boxes:** Allows user to remove one or more drafts in conjunction with the Delete Button.

4. **Continue Filing:** A hyperlink displaying a previously saved filing. Click the hyperlink to continue a saved draft.

5. **Filing ID**: Is a unique number that identifies a single e-filing transaction consisting of one or more e-filed documents.

6. **Date Started**: The date the saved e-filing was started.

7. **Date Updated**: Displays a date the saved filing was edited and re-saved.

8. **Filing Type**: This column displays the county and case type details of a draft.

9. **Case Number:** Each submitted case is assigned a case number as it relates to a selected court location.

   - The Drafts table displays case number as a hyperlink if the case is an existing case. Selecting the hyperlink will take the user to the Case History Screen.

   - If a new case is saved in Drafts, a case number will not display because the case has not been formally submitted through the system.

10. **Location**: Cases and documents filed through the system are submitted to a court location. This column identifies the location.

11. **Case Caption**: If the case exists, this column displays the caption as accepted or created by the court. Case caption in this table display as hyperlinks. View case information by clicking on the case caption hyperlink. A draft of a new case will not display a case caption.

FILE INTO AN EXISTING TRIAL COURT CASE

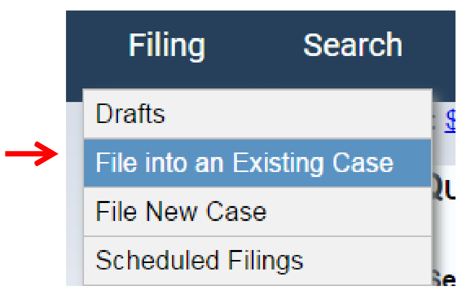
Choose the “File into an Existing Case” option to e-file a new document into an existing court case**.**

File into an Existing Case – How to Find

File Into an Existing Case

From the Home page, click the file folder.

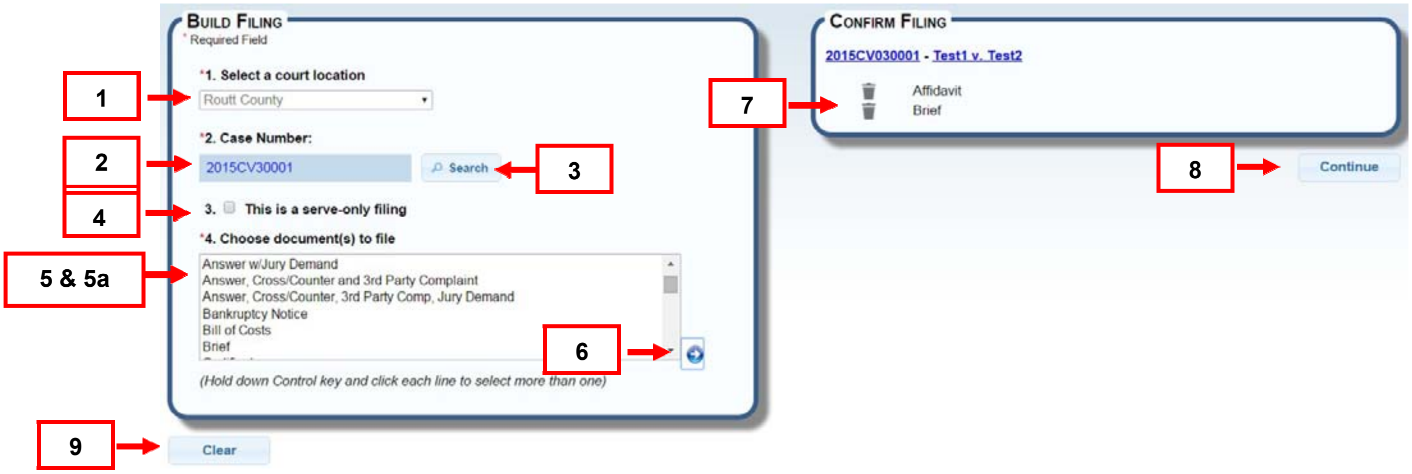
 or click the folder on Filing ID, Case History or Search results screens.



Hover over the **Filing** tab to choose the **File into an Existing Case** menu optio

FILE INTO EXISTING TRIAL COURT CASE – BUILD FILING

FILE BUILDER



1. Select a court location.

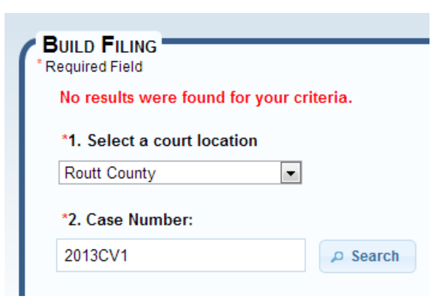
    a. Note: If you clicked a file folder  within the application, the court location pre-populates the box.

2. Enter a case number (Year "20XX," Class "CA or SC," Sequence "123456").

    a. If you clicked a file folder within the application, the case number pre-populates the box.

3. Click the "Search" button to find the existing case.

    - If the case does not exist, an information message displays.



4. If the case exists, you have the option to select if this is a serve-only filing. Select the serve-only filing checkbox. This will allow you to select serve-only documents in addition to the documents already available.

5. The option to choose document(s) to file will display.

    a. Choose documents to file from the list. Hold down the control key (Ctrl) to select more than one document.

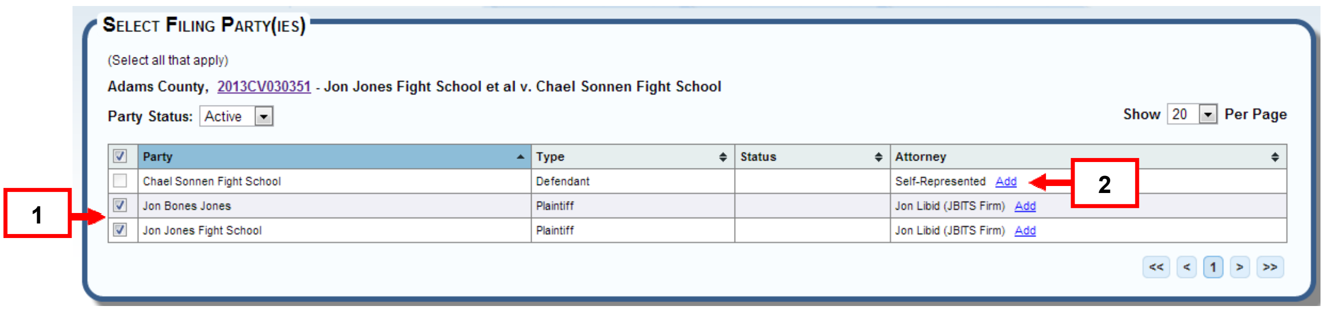
6. Press the blue arrow button. The document(s) will display on the right side in "Confirm Filing" section.

7. Click the trash can icon to remove a document from the “Confirm Filing” section.
8. Press Continue.
9. Press *Clear* to re-set all selections on this screen.

PROGRESS BAR

Moving past the Build Filing screen, note the Progress Bar at the top of the page. Click on any section to navigate to that screen.

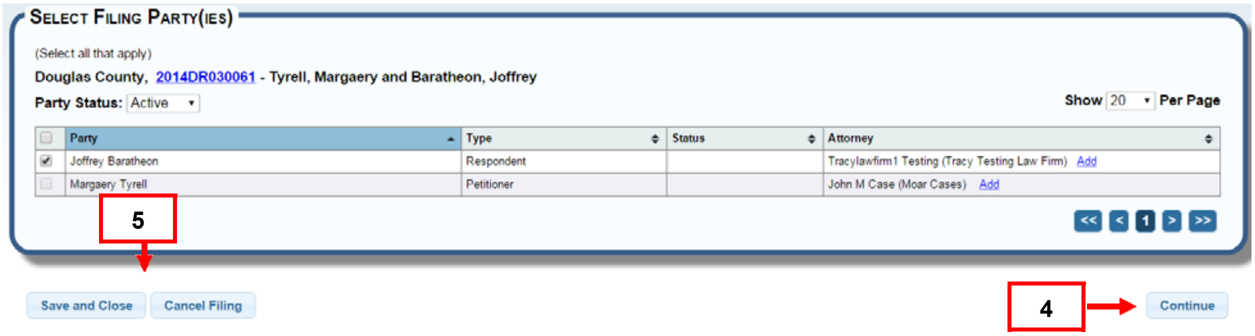
FILE INTO EXISTING TRIAL COURT CASE - REVIEW FILING PARTIES



1. The party that the user is associated with will auto select. If filing a new pleading and not yet associated to a party, you must complete step “2” and add counsel to that party. Once added, the box will auto check as filing party.

2. To add an attorney to a party, click the “Add” link in the “Attorney” column.

3. Select an attorney from the dropdown list, and click “Save.”
    a. If the incorrect attorney is selected, the option to remove is available.

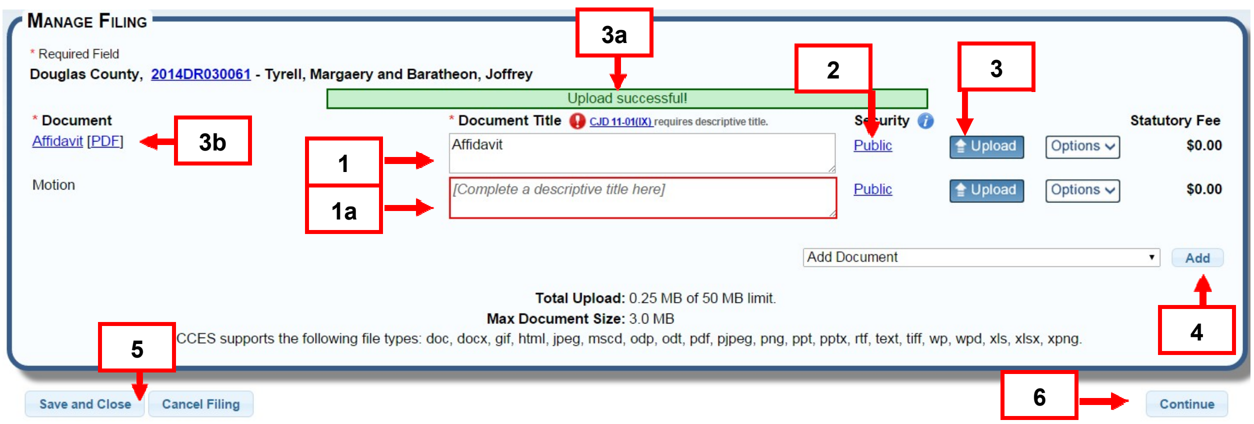


4. Click **Continue.**

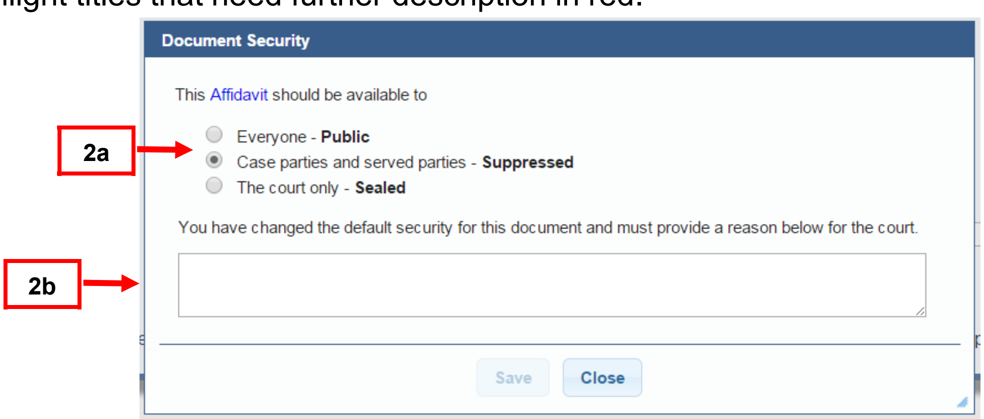
5. Every screen on the File Builder features "Save and Close" and "Cancel Filing" buttons. "Save and Close" moves the item to "Drafts." The "Cancel Filing" option closes the File Builder and does not save the filing.

FILE INTO EXISTING TRIAL COURT CASE – MANAGE FILING – SECURITY, UPLOADING, AND ADDING EVENT

This section displays how to add, edit, upload and relate documents.



1. The **Document Title can be edited** if needed or required.
   a. Chief Justice Directive 11-01(IX) requires descriptive document titles. The system will highlight titles that need further description in red.



2. To change the security default of “Public” click on the security link under Security. (Certain documents have a default level of security higher than “Public” and will prevent you from lowering that status)

   a. The available security levels, from least to most restrictive are:

      o Public: Any user can view the document.

      o Protected: Any user can view the document following redaction. Before redaction, only judges, court and Judicial Department staff, and parties to the case (including parties’ attorneys) can view a protected document.

      o Suppressed: Judges, court and Judicial Department staff, and parties to the case (including parties’ attorneys) can view a suppressed document.

      o Restricted: Judges, court and Judicial Department staff, parties to the case (including parties’ attorneys), and criminal justice agencies can view a restricted document.

      o Private: Only the filing party and served parties can view a restricted/private document.

      o Sealed: Only judges and court/Judicial Department staff can view a sealed document. No other party, including parties to the case, have access to a sealed document.

   b. If the security is changed from the default selection a reason for the security change will be required for the court. Selected security is not official until accepted by the court.

3. Click the upload button to upload a document. Double click the document from your folder, or highlight it and press “Open.”

   a. A green status bar flashes confirming your upload.

   b. The document under “*Document” label becomes a link. Click the name of the link to bring up the original filing format, ex: if word document was filed, OR click the “PDF” link to review the document in PDF format.

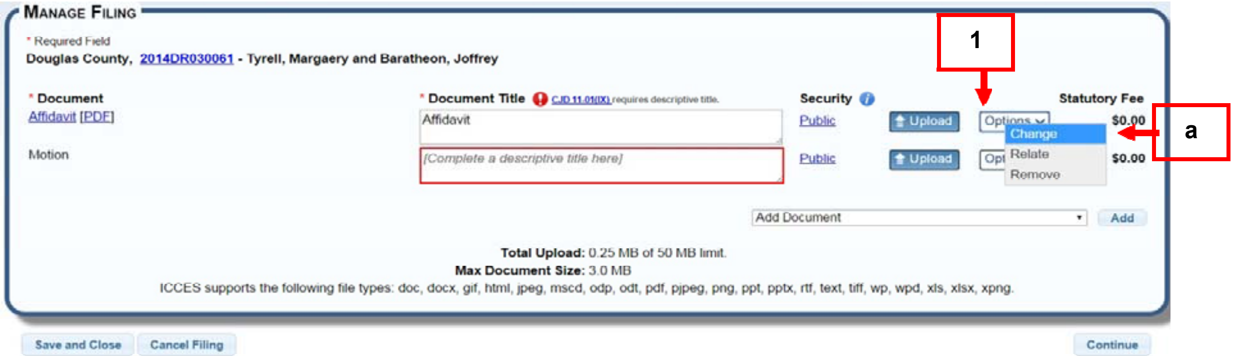
4. Include any missed filings by clicking the arrow in the “Add Document” box. Highlight and select the additional document, and click the “Add” button to add it.

   a. Repeat step 3 to upload.

5. Every screen on the File Builder features “Save and Close” and “Cancel Filing” options. “Save and Close” moves the item to Drafts. The “Cancel Filing” option closes the File Builder and does not save the filing.

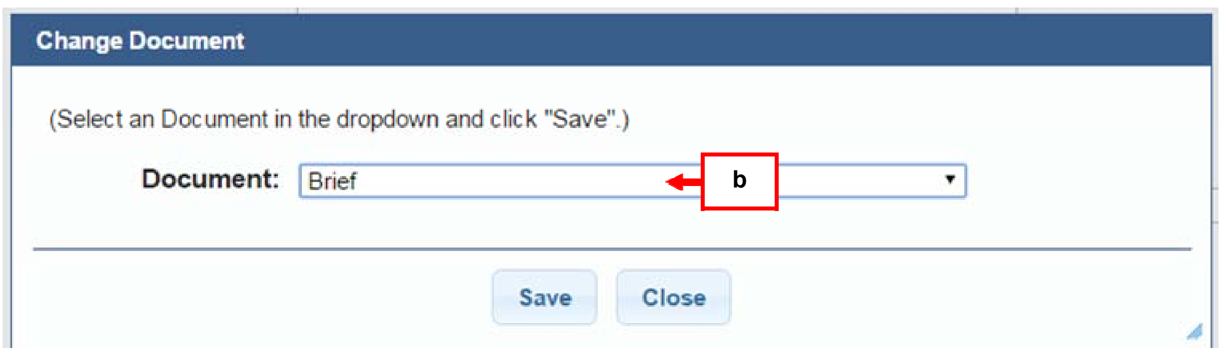
6. Press “Continue.”

MANAGE FILING – CHANGE, RELATE AND REMOVE DOCUMENTS



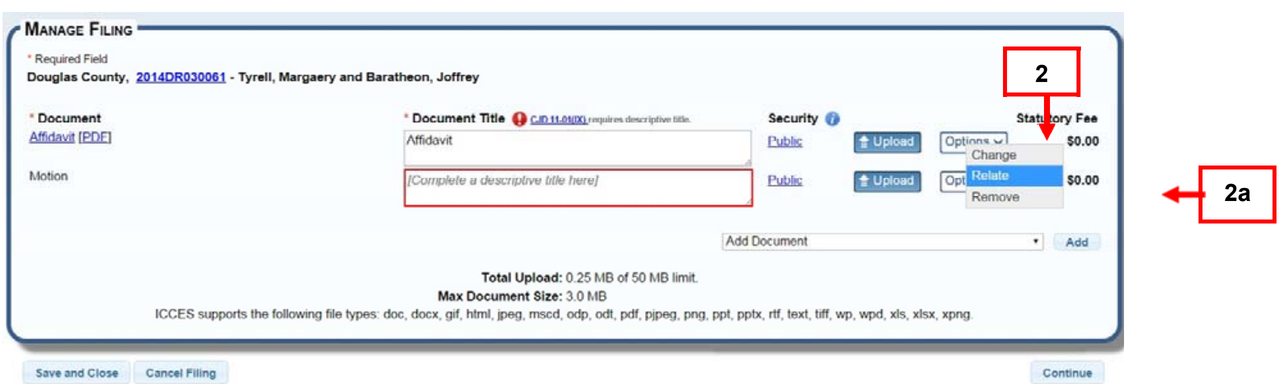
1. To change a document type entered incorrectly, click the options menu next to the upload button.

    a. Choose **Change.**



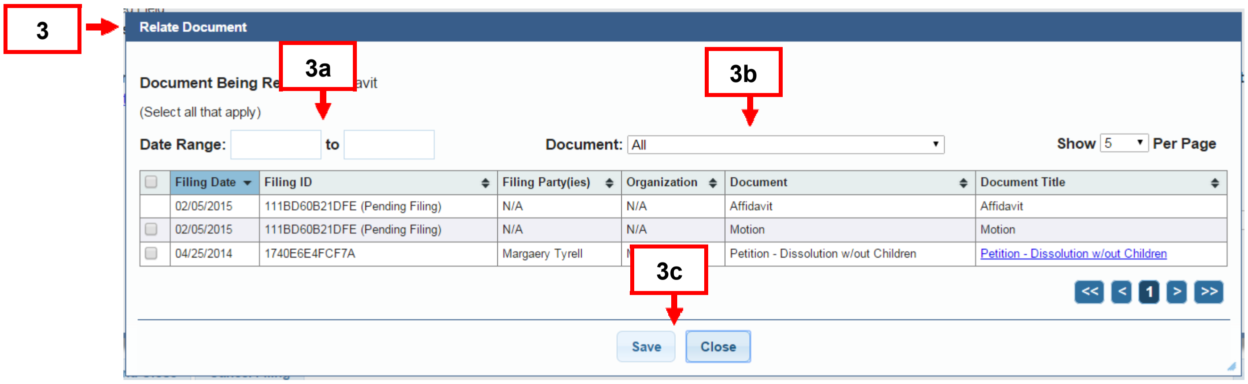
b. From the pop up, select a new document from the dropdown and click “Save” to make the change or “Close” to cancel.

WARNING: If a document was uploaded to match the original document selected, make sure the correct document matches the change that is made. If you need to re-upload a corrected document, select upload to overwrite the existing uploaded document.



2. Relate a document to an existing case filing, by clicking options menu next to the upload button.

a. Choose **Relate** from the options.

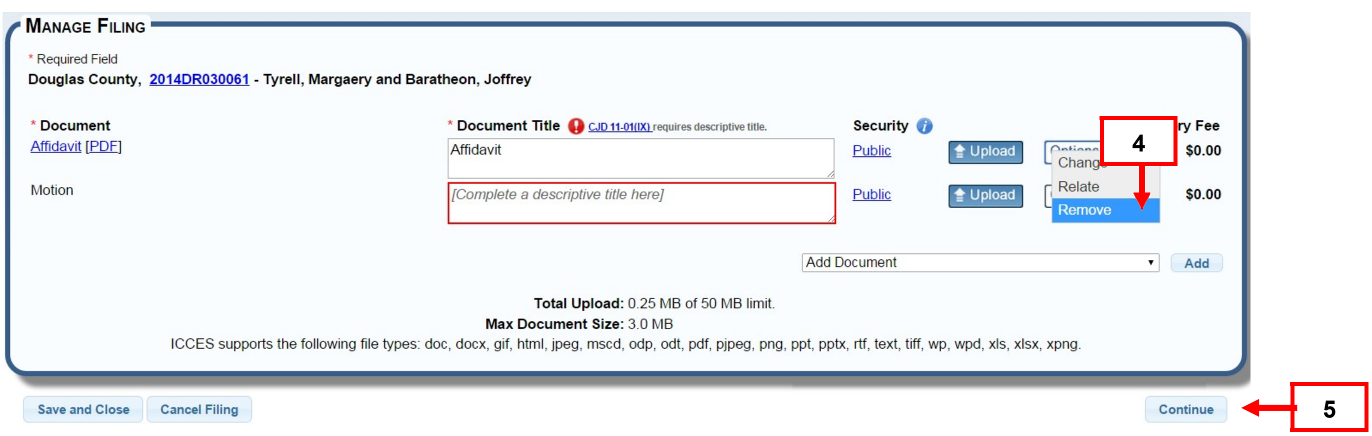


3. A Relate Document table displays listing all case filing events. Click the checkbox to relate an item.

   a. Filter the table from the filing date. Click in the date range boxes to select.

   b. Filter the table for case documents. Click the arrow, highlight and select a document(s).

   c. Click the “Save” button to save. The “Close” button cancels the screen without saving changes.



4. Remove any document from the Manage Filing screen (Does not include initiating documents for File New Case) by clicking the options menu next to the upload button and selecting **Remove**. If a document is related to a main document, it will also be removed.

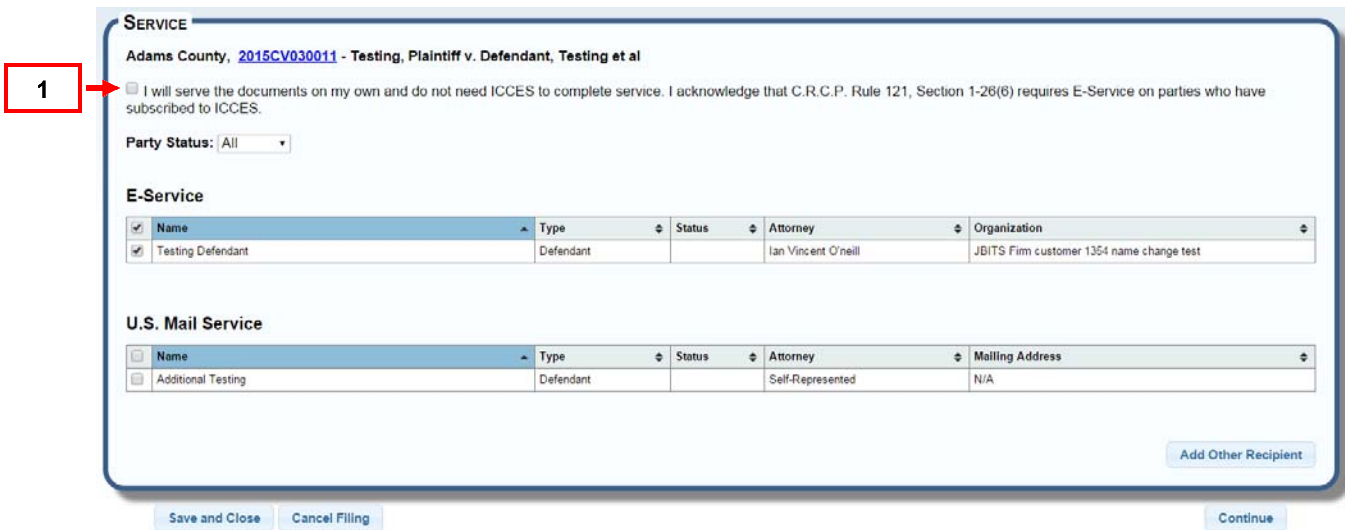
5. Once all documents have been uploaded, press Continue.

FILE INTO EXISTING TRIAL COURT CASE – SERVICE

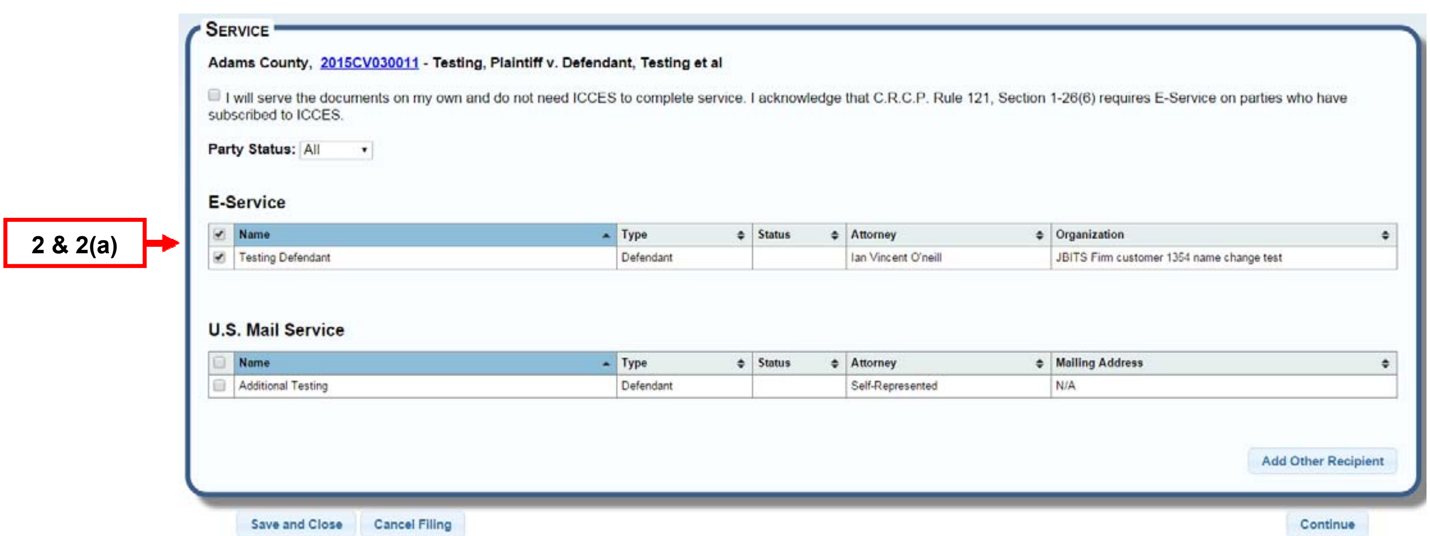
Service has two sections.

E-Service: Parties who are represented by counsel and have a Colorado Courts E-Filing account.

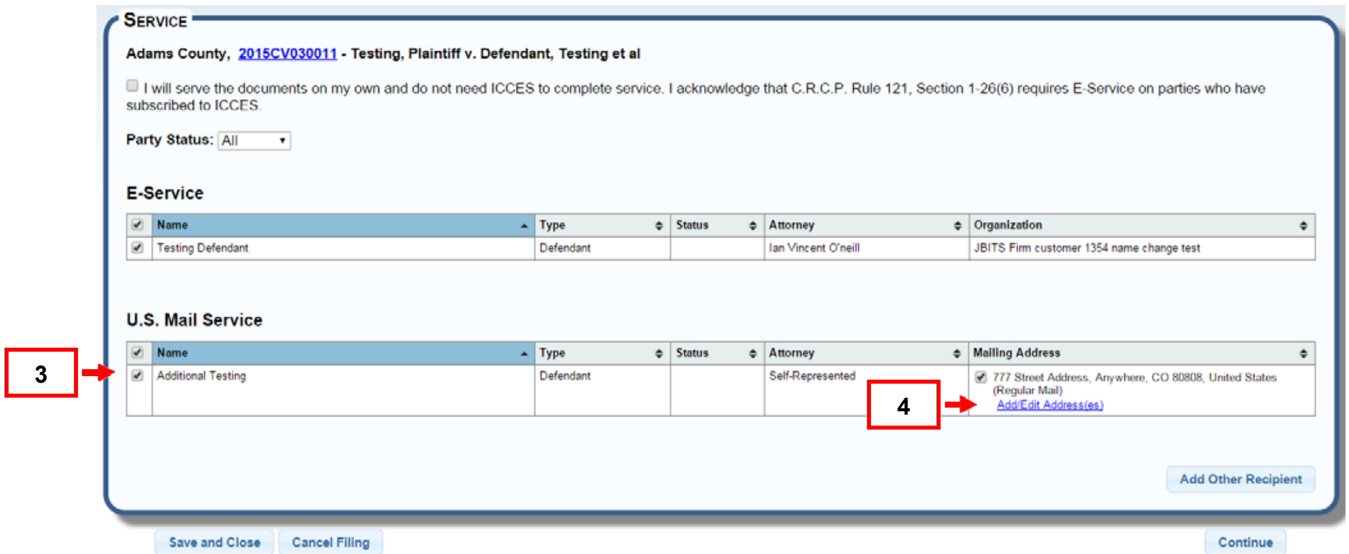
U.S. Mail: Party(ies) to the case that do not have a Colorado Courts E-Filing account.



1. If you ***do not*** want the system to e-serve or mail documents, check the "I will serve the documents on my own and do not need the Colorado Courts E-Filing system to complete service" checkbox at the top of the Service list.

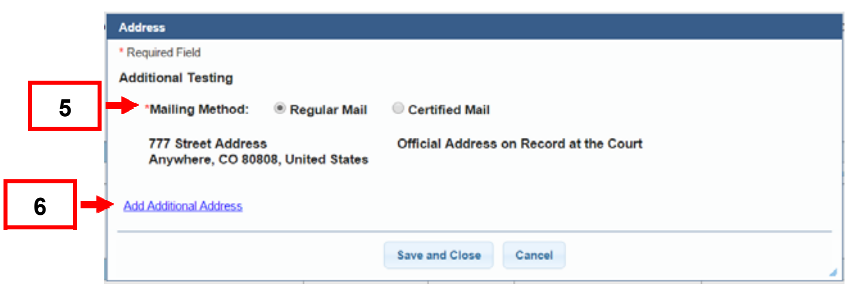


2. If the box remains unchecked, e-service will auto-select for you if there are any parties that are represented by counsel and if counsel has a Colorado Courts E-Filing system account.
    a. To deselect all parties, select the checkbox at the top of the checkbox column, or deselect one party at a time by unchecking the box next to the user's name.



3. To select a party to mail, check the box next to the party name.
    a. If the party has an address on file with the court, the address will display and auto-check if you are a party to the case. An official court address cannot be edited, but the mailing method can be changed to Certified mail.

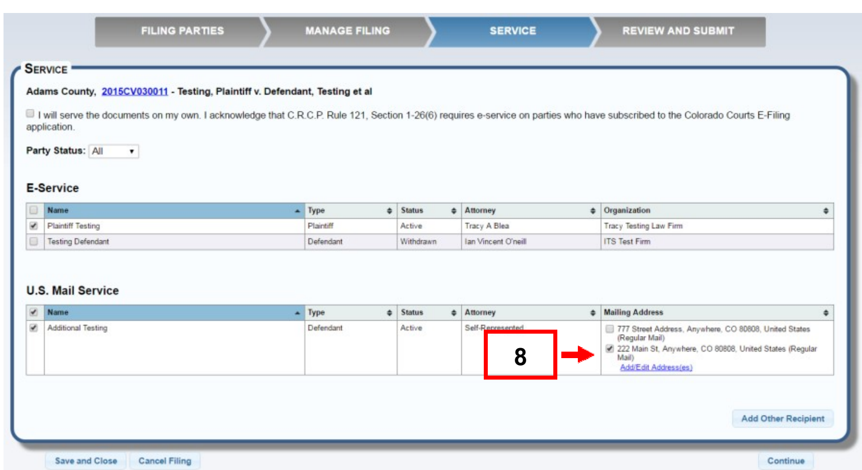
4. To change regular mailing to certified mailing, select the "Add/Edit Address(es)" link to the right of the party name.



5. A pop up will appear "Regular Mail" is auto-selected. Change by selecting radio button for Certified Mailing and press "Save and Close".
6. If adding an additional address, select the "Add Additional Address" link.

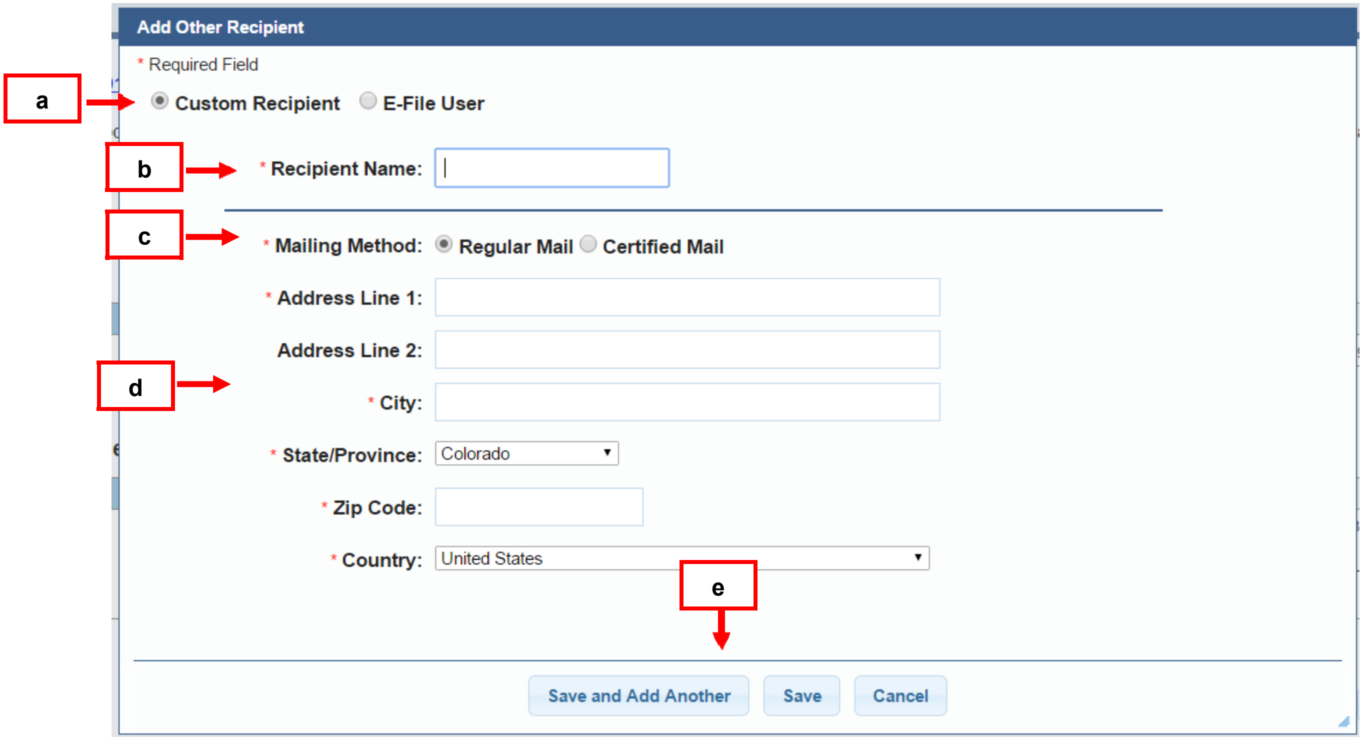
7. Fill out all required fields:
    a. To add more than one, select “Add Address” button. This will also allow you to edit addresses just added.

    b. OR Press “Save and Close” to add address and go back to the service screen.



8. The last address added will auto-check. If multiple addresses are needed for mailing, check any additional addresses listed.

To include a Custom Recipient, click the “Add Other Recipient” button in the service screen. Add Other Recipient means an e-filer can ask the Colorado Courts E-Filing system to either mail or e-serve filings to another person whose name does not display on the Service screen.



For a custom recipient:

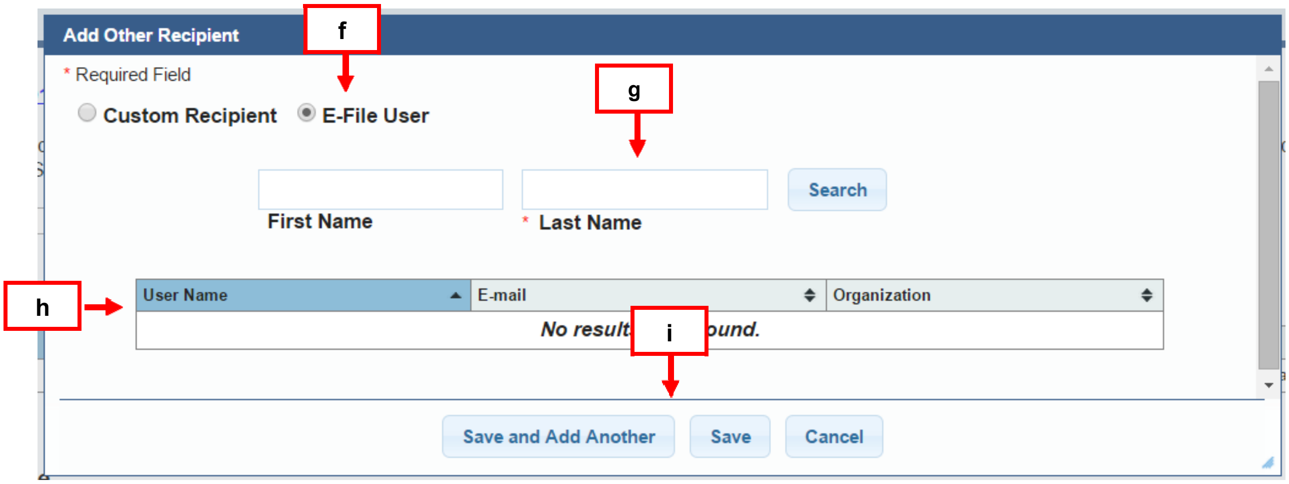
a. Click the “Custom Recipient” radio button.

b. Enter the recipient name.

c. Select “Mailing Method” of either “Certified Mail” or “US Mail.”

d. Enter the mailing address.

e. To save the information press “Save”, to exit and cancel click “Cancel”. To continue adding additional recipients, click “Save and Add Another”.



For an e-file user:

f. Click the “E-file User” radio button.

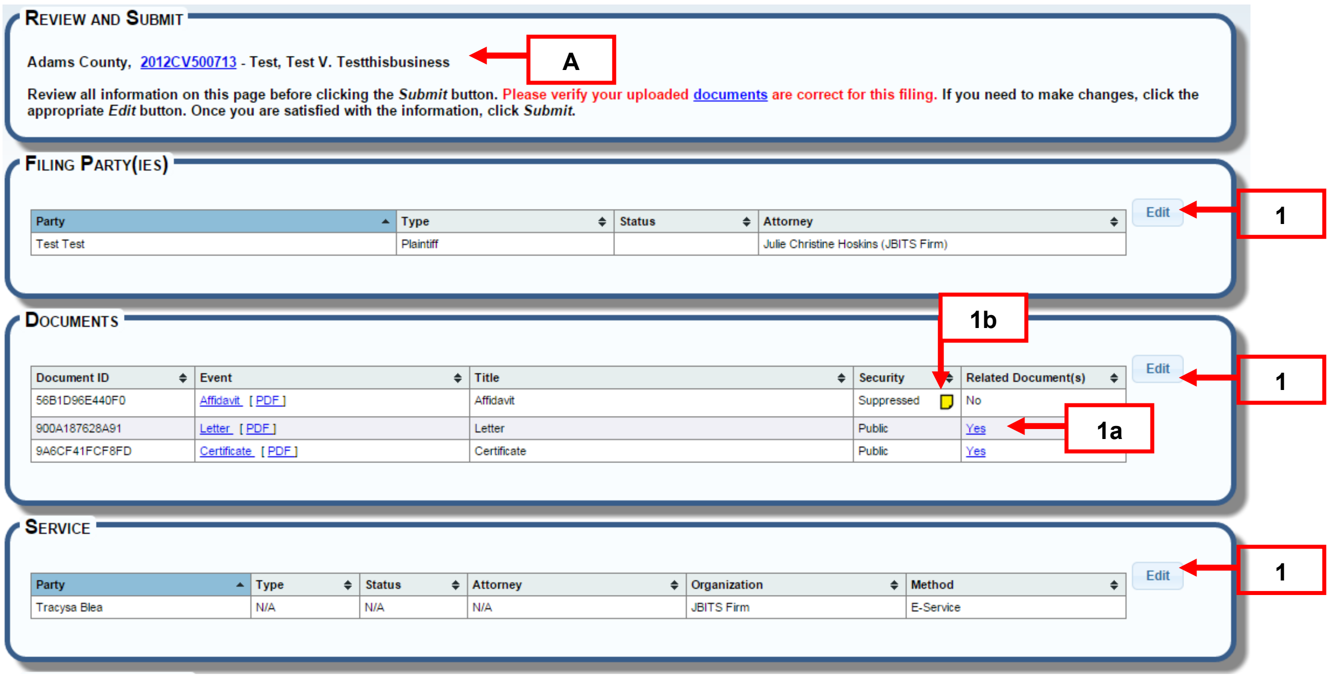
g. Enter, at minimum, the user’s last name and press “Search.”

h. Select the user name from the search result list.

i. To save the information press “Save”, to exit and cancel click “Cancel”. To continue adding additional recipients, click “Save and Add Another”.

REVIEW AND SUBMIT

Review and submit is a summary of the current filing.

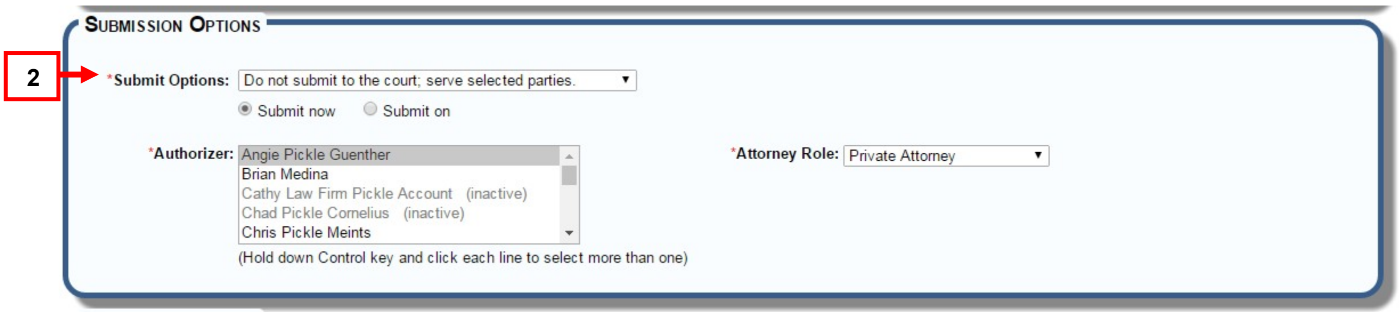


A. The county, case number and case caption display on the first line.

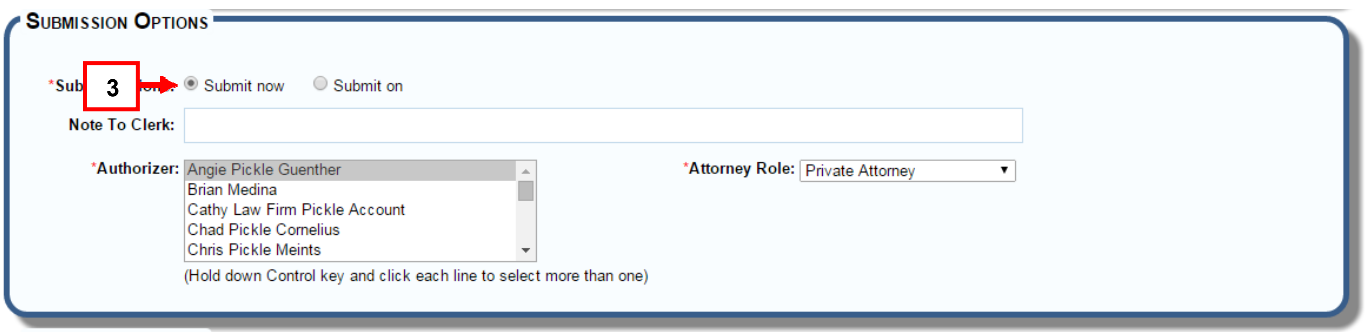
1. **Edit Buttons**: Review the Filing Party(ies), Documents, and Service sections. Click the “Edit” button on the right in any of these sections to change or update information.

a. If the “Relate” option was selected in the “Manage Filing” screen, the column “Related Document(s)” will have a “Yes” link to allow the user to confirm the related document(s).

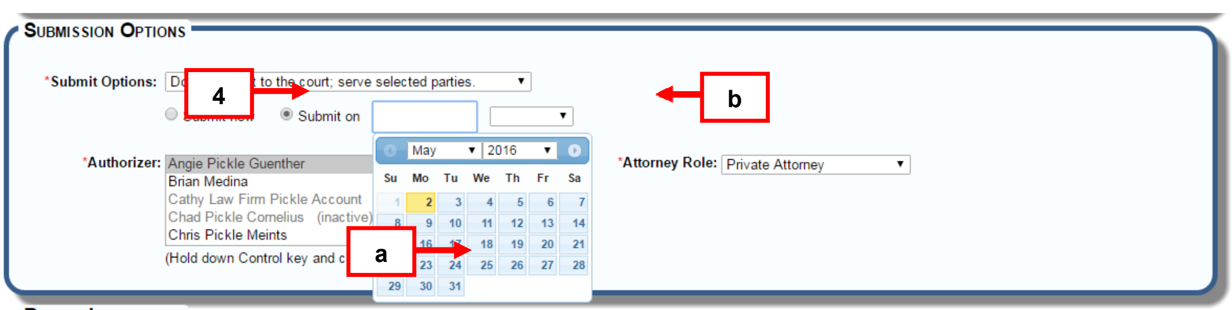
b. If the Security was changed from the default in the manage filing screen, the column “Security” will have the new security setting and a “Note” icon to allow the user to confirm the reason for the security change.



2. There are two Submit Options choices for submitting a filing(s) into an existing case.
   a. **Submit to the court and serve selected parties:** This will submit your filing to the court for clerk review.
   b. **Do not submit to the court, serve selected parties:** This will submit your filing as a serve only filing. This filing will not go to the court.



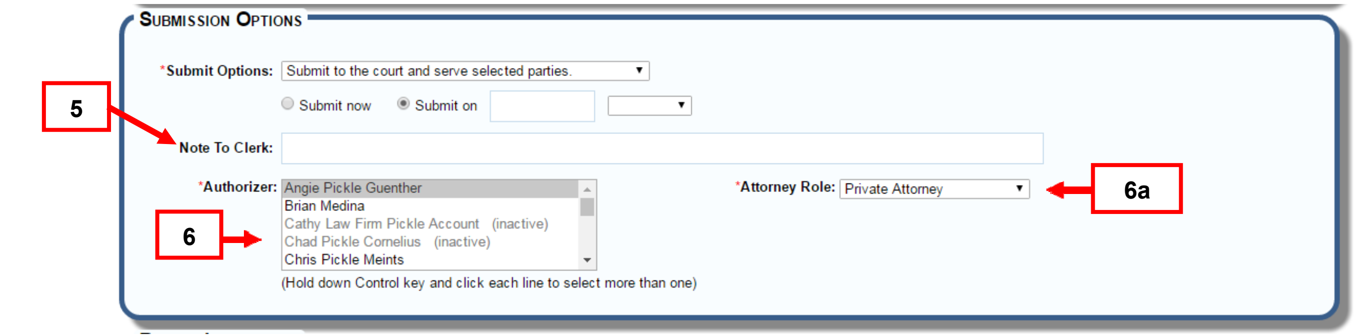
3. Leave “Submit now” selected to send the filing immediately.



4. To delay a filing to the court or to delay a “serve only” submission, postpone submitting by clicking the “Submit On” button.

   a. Select a future date from the pop up date box.

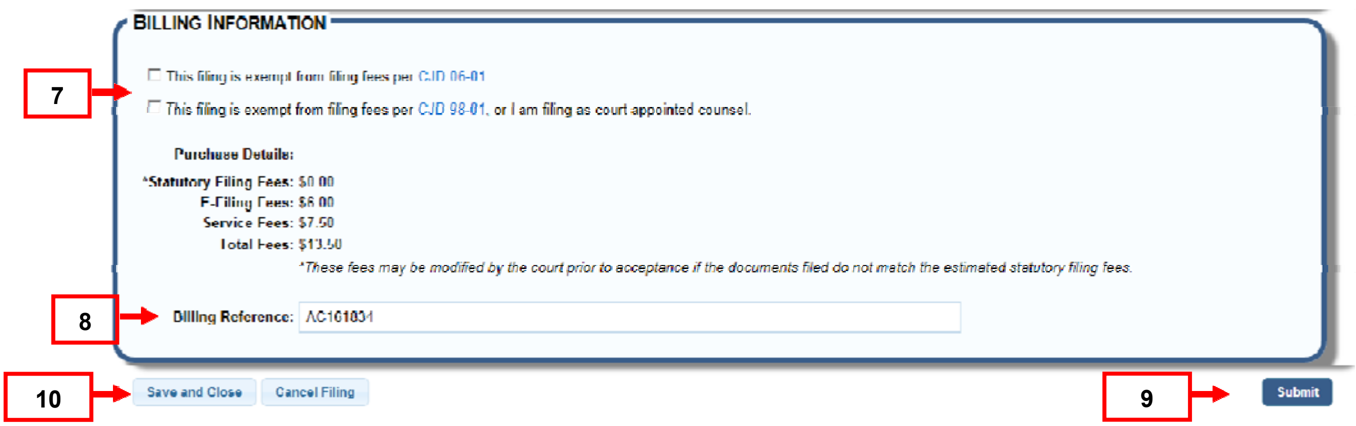
   b. Enter the time of day. The filing will be saved in Scheduled Filings.



5. Enter any *helpful* notes the court may need to process the filing.

6. Select the "Authorizer(s)" from your organization.

    a. Choose "Attorney Role."



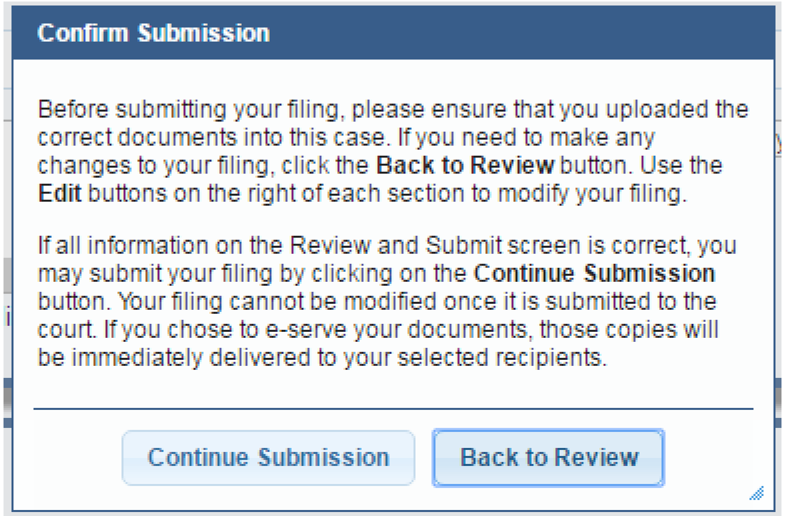
7. If the filing is exempt from fees per Chief Justice Directive 06-01 or 98-01, select the appropriate box. Select link to view CJD.

8. Enter any "Billing Reference" i.e. a specific organization billing reference.

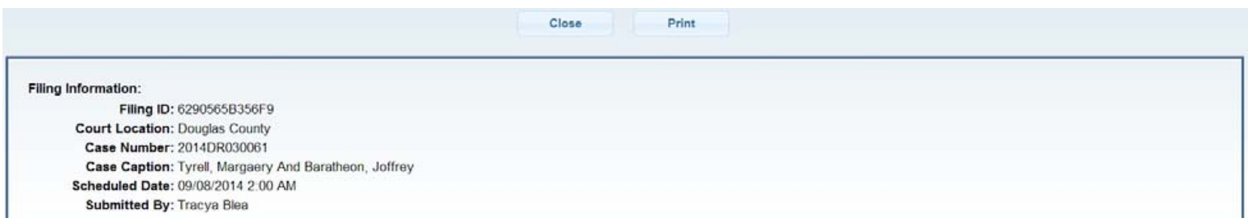
9. Click "Submit" to complete your filing.

10. "Save and Close" saves the filing in "Drafts" so it can be finished later. Click "Drafts" on the "Filing" screen to resume the filing. Click "Cancel Filing" to exit and cancel the filing completely.

Upon submission, a message to either go “Back to Review” filing, or “Continue Submission” will appear. Once submitted, the filing cannot be removed by the Colorado Courts E-Filing system or the user. The court must be contacted for further action.



A confirmation page will then be available to print for the user’s record. (partial page)



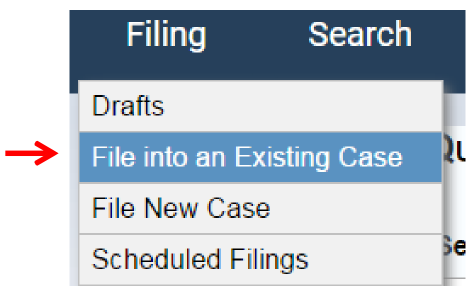
FILE INTO AN EXISTING APPEALS CASE

Choose the “File into an Existing Case” option to e-file a new document into an existing court case**.**

File into an Existing Appeals Case – How to Find

From the Home page, click the file folder.

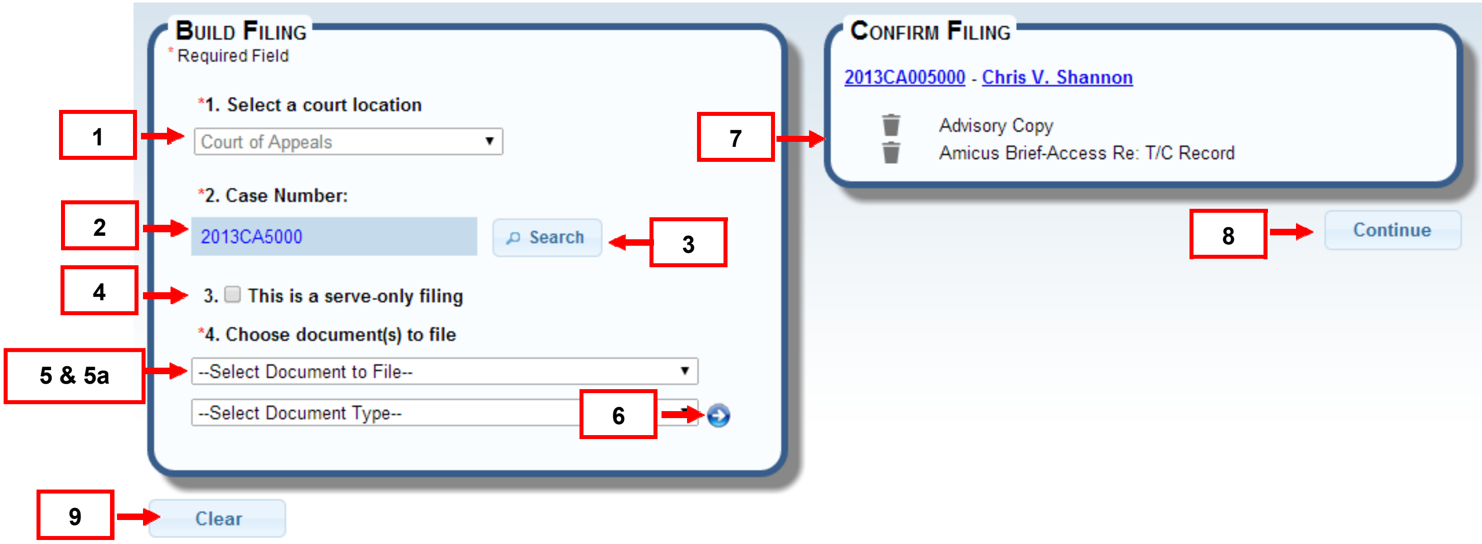
 or click the folder on Filing ID, Case History or Search results screens.



Hover over the **Filing** tab to choose the **File into an Existing Case** menu option.

FILE INTO EXISTING APPEALS CASE – BUILD FILING

FILE BUILDER

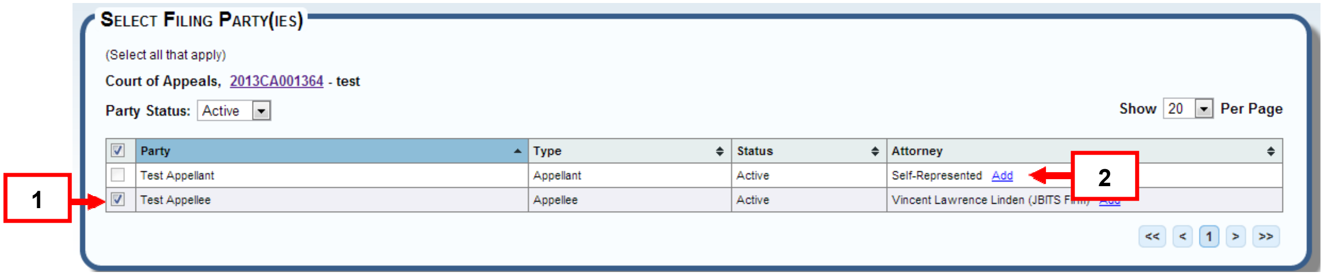


1. Select a court location.
    a. Note: If a file folder is clicked within the application, the court location pre-populates the field.
2. Enter a case number (Year "20XX," Class "CA or SC," Sequence "123456").
    a. If a file folder is clicked within the application, the case number pre-populates the field.
3. Click the "Search" button to find the existing case.
    - If the case does not exist, an information message displays.
4. If the case exists, you have the option to select if this is a serve-only filing. Select the serve-only filing checkbox. This will allow you to select serve-only documents in addition to the documents already available.
5. The option to choose document(s) to file will display.
    a. Choose document to file from the list. "Document to File" is required, "Document Type" is optional.
6. Press the blue arrow button. The document will display on the right side in "Confirm Filing" section. Add as many documents as needed.
7. Click the trash can icon to remove a document from the "Confirm Filing" section.
8. Press Continue.
9. Press *Clear* to re-set all selections on this screen.

PROGRESS BAR

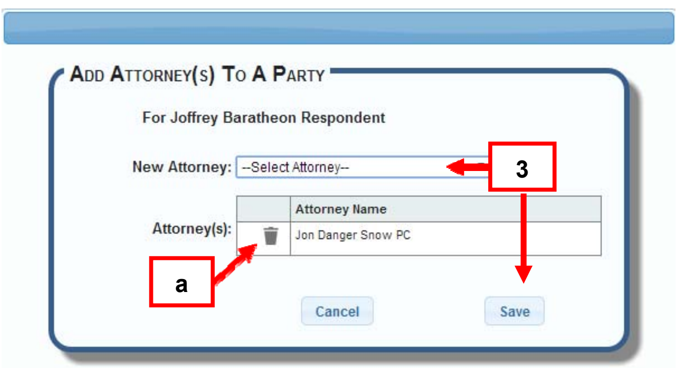
Moving past the Build Filing screen, note the Progress Bar at the top of the page. Click on any section to navigate to that screen.

FILE INTO EXISTING APPEALS CASE - REVIEW FILING PARTIES



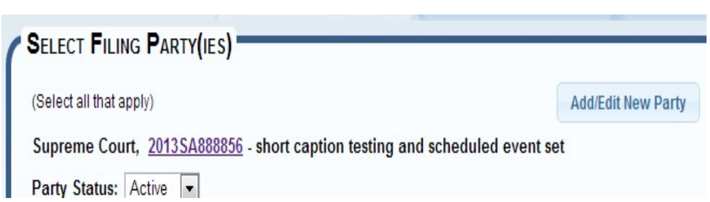
*1. The party that the user is associated with will auto select. If filing a new pleading and not yet associated to a party, you must complete step “2” and add counsel to that party. Once added, the box will auto check as filing party.

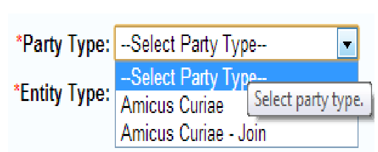
2. To add an attorney to a party, click the “Add” link in the “Attorney” column.

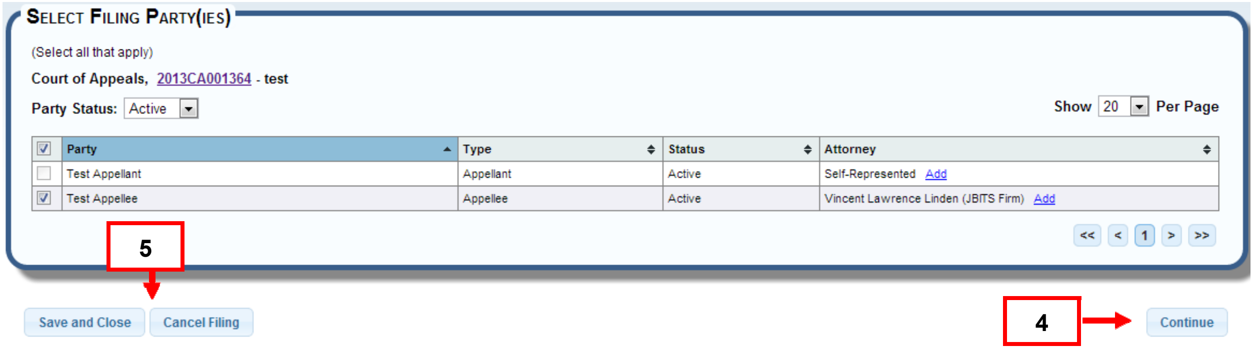


3. Select an attorney from the dropdown list, and click “Save.”
    a. If the incorrect attorney is selected, the option to remove is available.

*** For Supreme Court case types of SA or SC, on the “Select Filing Party” screen the option to add a party type of: “Amicus Curiae” or “Amicus Curiae-Join” is available.**





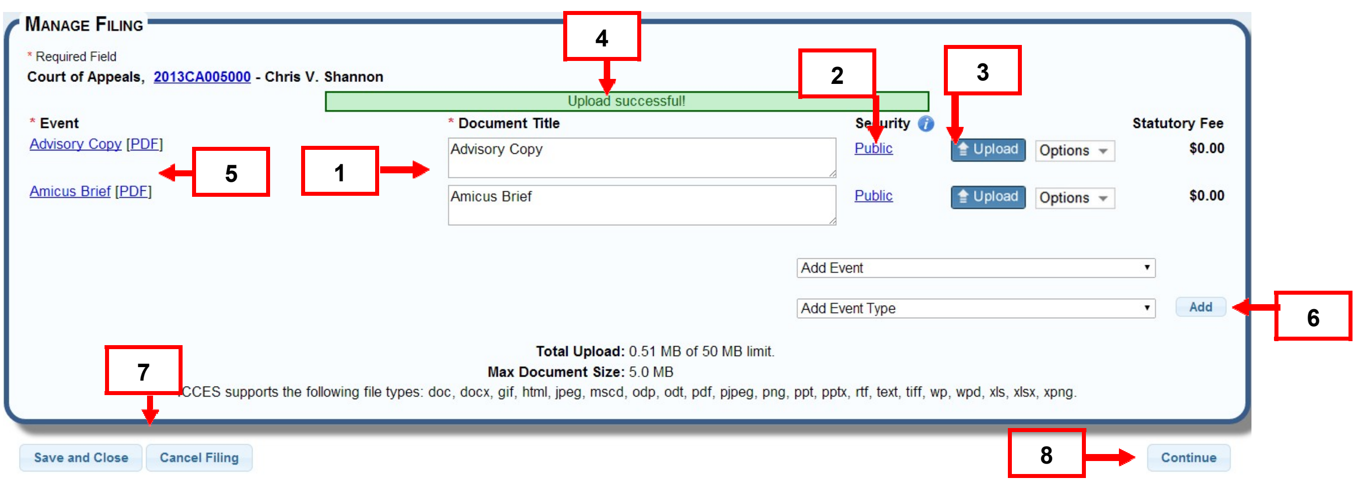


4. Click **Continue.**

5. Every screen on the File Builder features "Save and Close" and "Cancel Filing" buttons. "Save and Close" moves the item to "Drafts." The "Cancel Filing" option closes the File Builder and does not save the filing.

FILE INTO EXISTING APPEALS CASE – MANAGE FILING – SECURITY, UPLOADING, AND ADDING DOCUMENT(S)

This section displays how filings are added, edited, uploaded and related.



1. The Document Title **can be edited** if needed.
2. To change the security default of "Public" click on the security link under *Security. (Certain documents have a default level of security higher than "Public" and will prevent you from lowering that status) Selected security is not official until accepted by the court. <u>*A note to the clerk in "Review in Submit" screen is advisable if security is changed.*</u>

The available security levels, from least to most restrictive are:

- o Public: Any user can view the document.
- o Protected/Suppressed/Restricted: Parties to the case can view a suppressed document.

- Private: Only the filing party and served parties can view a private document.
- Sealed: Only the court will be able to view the contents of a sealed document. No other party including parties to the case have viewing access to a sealed document.

3. To upload a document, click the upload button. Double click the document from your folder list, or highlight it and press “Open.”

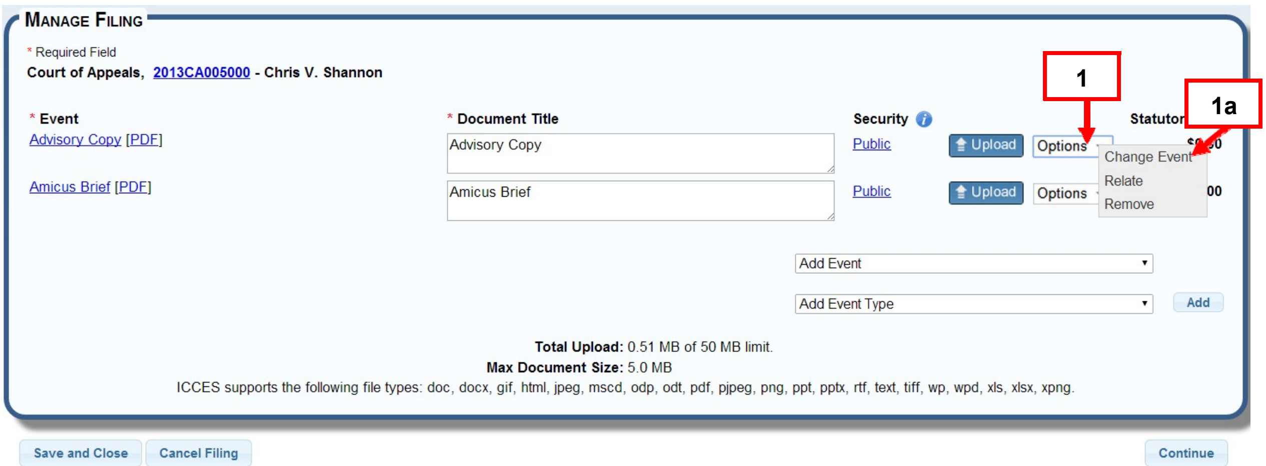
4. A green status bar flashes confirming your upload.
5. The document under *Document is now a link. Click the link to review the document.
6. Include any missed filings by clicking the arrow in the “Add Event” box. Highlight and select the new filing event, and click the “Add” button.

    a. Repeat step 3 to upload.

7. Every screen on the File Builder features “Save and Close” and “Cancel Filing” options. “Save and Close” moves the item to Drafts. The “Cancel Filing” option closes the File Builder and does not save the filing.

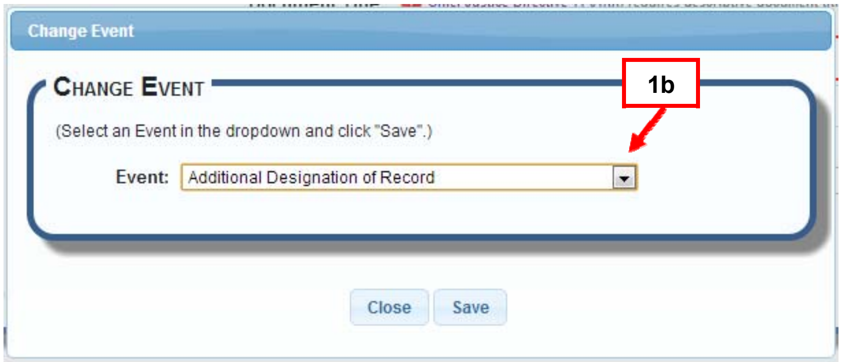
8. Press “Continue.”

MANAGE FILING – CHANGE EVENT, RELATE AND REMOVE DOCUMENTS



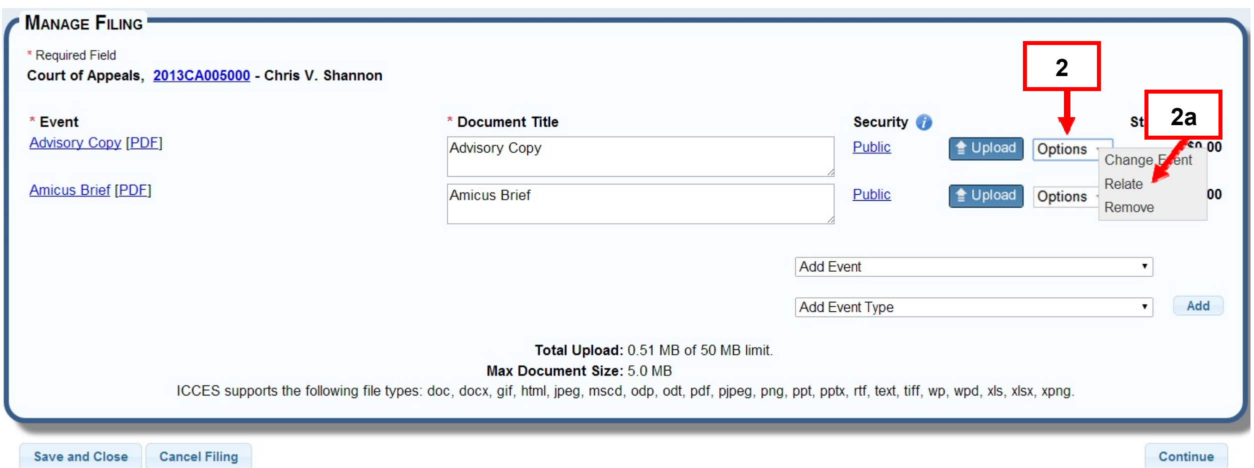
1. To change an event type, click the option menu next to the upload button.

a. Choose **Change.**



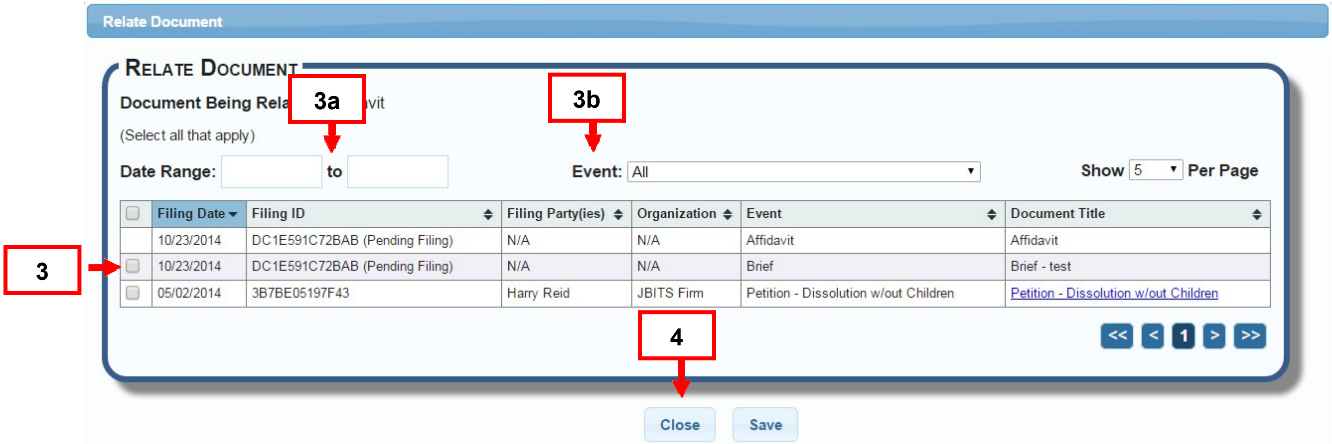
b. From the pop up, select a new event from the dropdown and click "Save" to make the change or "Close" to cancel.

WARNING: If a document has previously been uploaded and an event was changed, the document will remain and not be removed. Ensure the document matches the event you wish to file.



2. Relate a document to an existing case filing, by clicking the options menu next to the upload button.

   a. Choose **Relate** from the table of case filing event items**.**

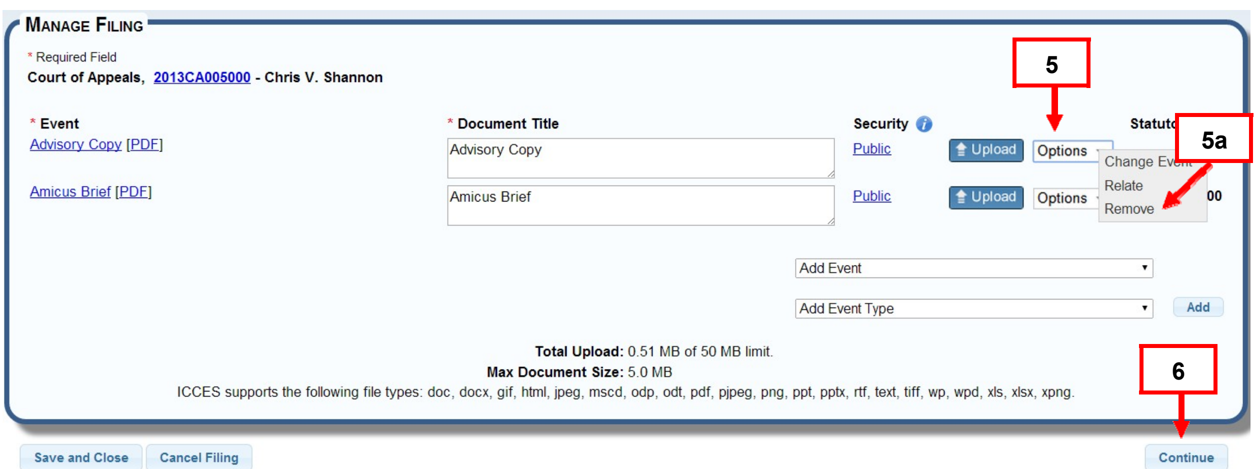


3. A Relate Document table displays listing all case filing events. Click the checkbox to relate an item.

    a. Filter the table from the filing date. Click in the date range boxes to select.

    b. Filter the table for case events. Click the arrow, highlight and select an event.

4. Click the "Save" button to save. The "Close" button cancels the screen without saving changes.



5. Remove any document from the Manage Filing screen (Does not include initiating documents for File New Case) by clicking the options menu to the upload button.

    a. Choose **Remove** from the table of case filing event items**.** If a document is related to a main document, it will also be removed.

6. Once all documents have been uploaded, press **Continue**.

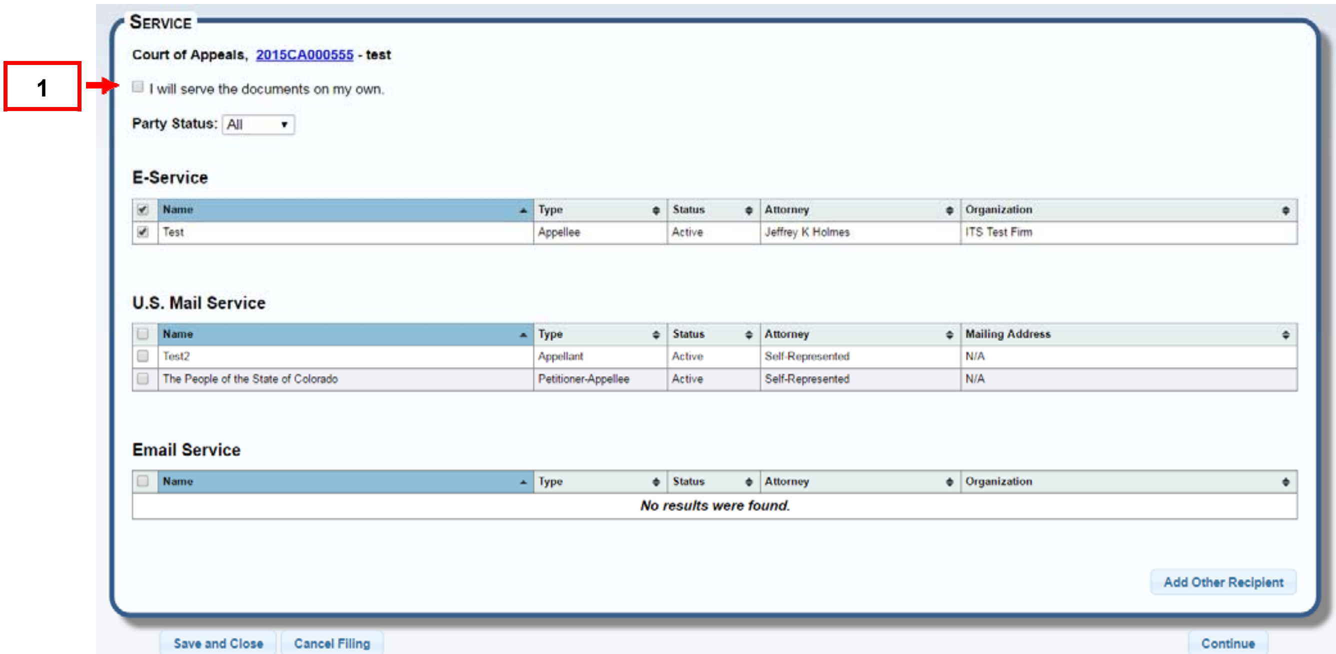
FILE INTO EXISTING APPEALS CASE – SERVICE

Service has three sections.

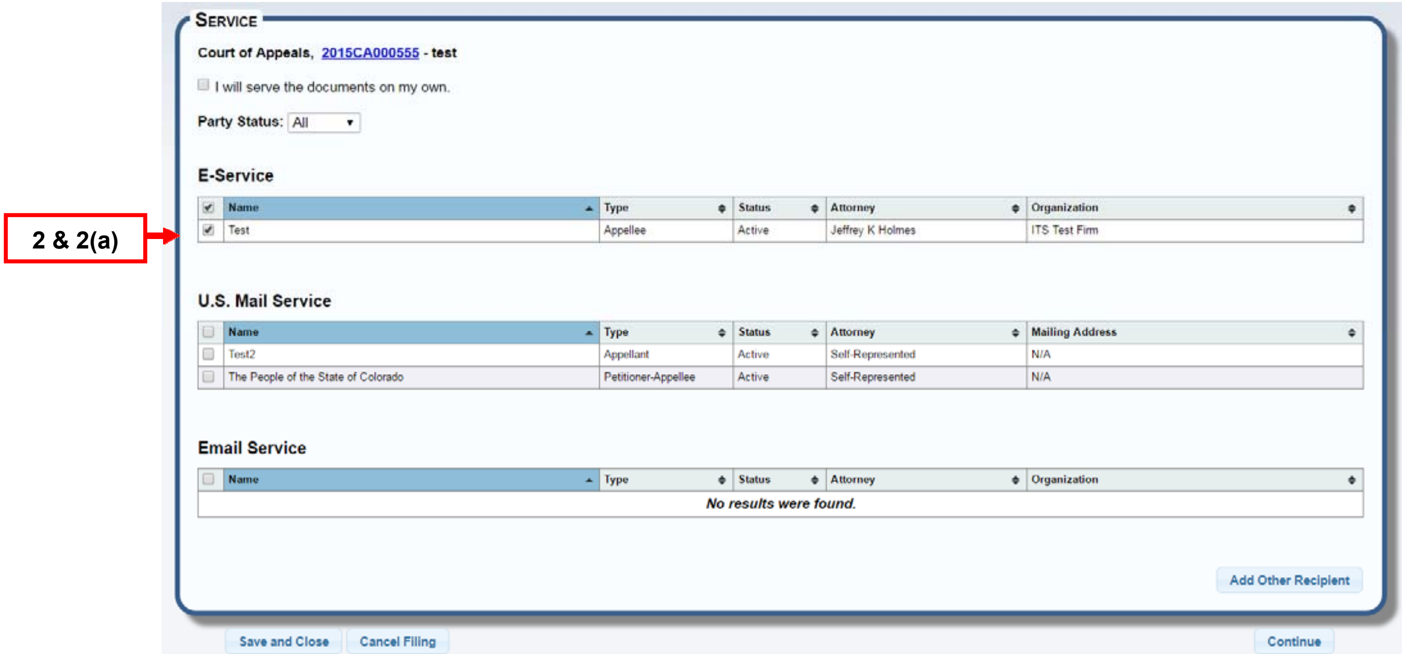
E-Service: Parties who are represented by counsel and have a Colorado Courts E-Filing account.

U.S. Mail: Party(ies) to the case that do not have a Colorado Courts E-Filing account.

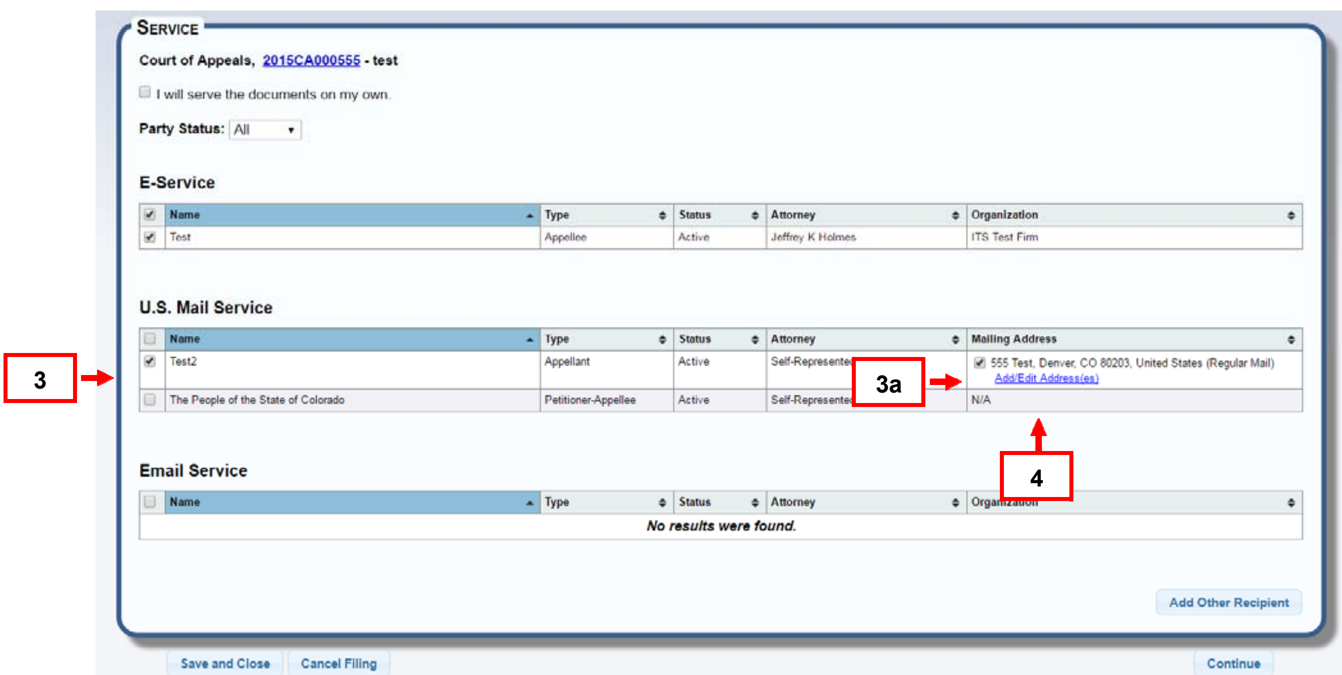
Email Service: For the service of Appeals Clerks.



1. If you ***do not*** want the system to e-serve or mail documents, check the "I will serve the documents on my own and do not need the Colorado Courts E-Filing system to complete service" checkbox at the top of the Service list.



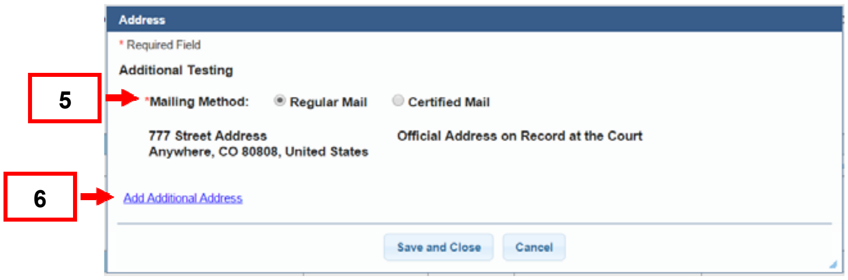
2. If the box remains unchecked, e-service will auto-select for you if there are any parties that are represented by counsel and if counsel has a Colorado Courts E-Filing account.
   a. To deselect all parties, select the checkbox at the top of the checkbox column, or deselect one party at a time by unchecking the box next to the user's name.



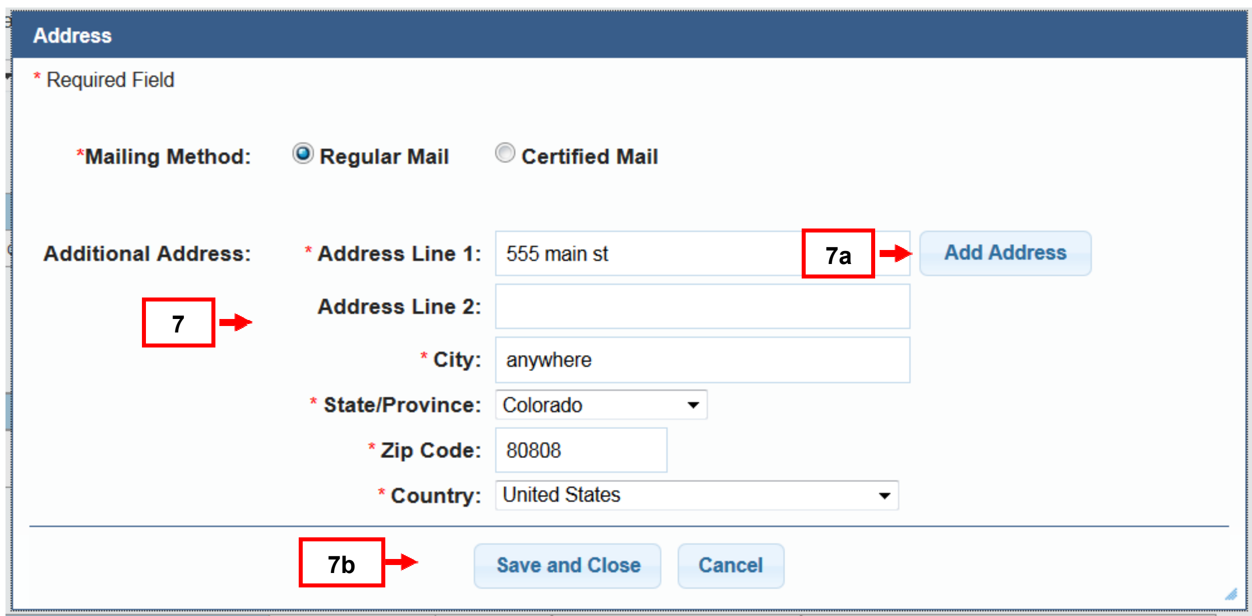
3. To select a party to mail, check the box next to the party name.

b. If the party has an address on file with the court, the address will display and auto-check. An official court address cannot be edited, but the mailing method can be changed to certified mailing.

4. To change regular mailing to certified mailing, select the “Add/Edit Address(es)” link to the right of the party name.

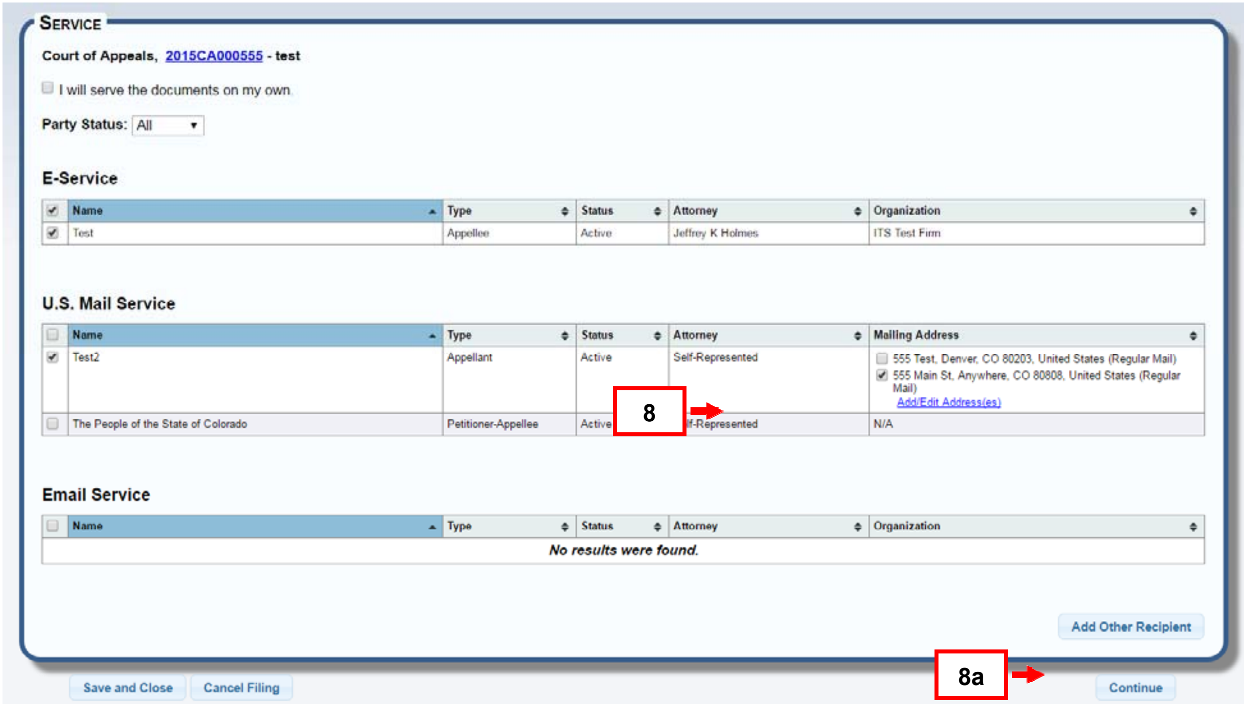


5. A pop up will appear “Regular Mail” is auto-selected. Change by selecting radio button for “Certified Mailing” and press “Save and Close”.
6. If adding an additional address, select the “Add Additional Address” link.



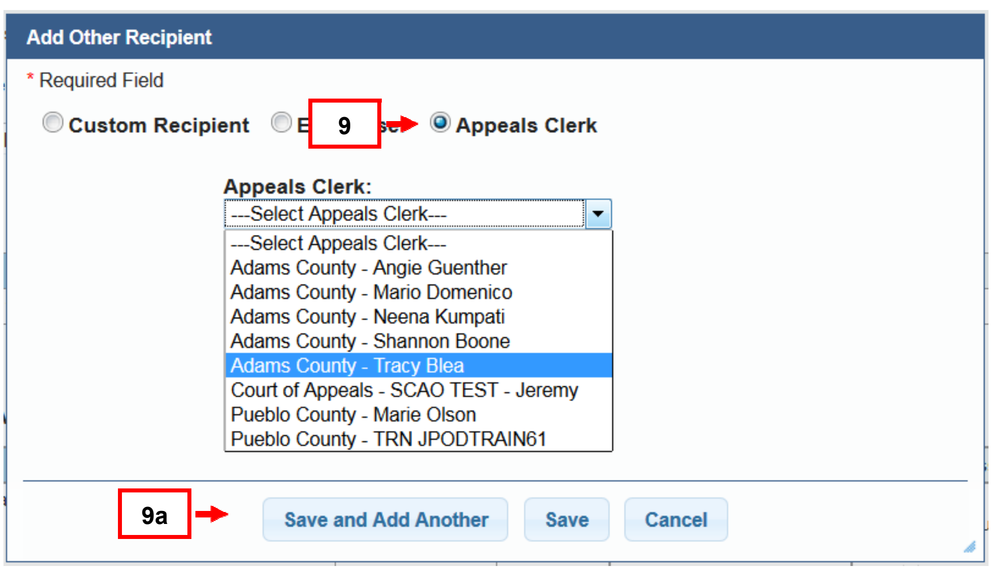
7. Fill out all required fields:
    1. To add more than one, select “Add Address” button. This will also allow you to edit address just added.

2. OR Press “Save and Close” to add address and go back to the service screen.



8. The last address added will auto-check. If multiple addresses needed for mailing, check any additional addresses listed.

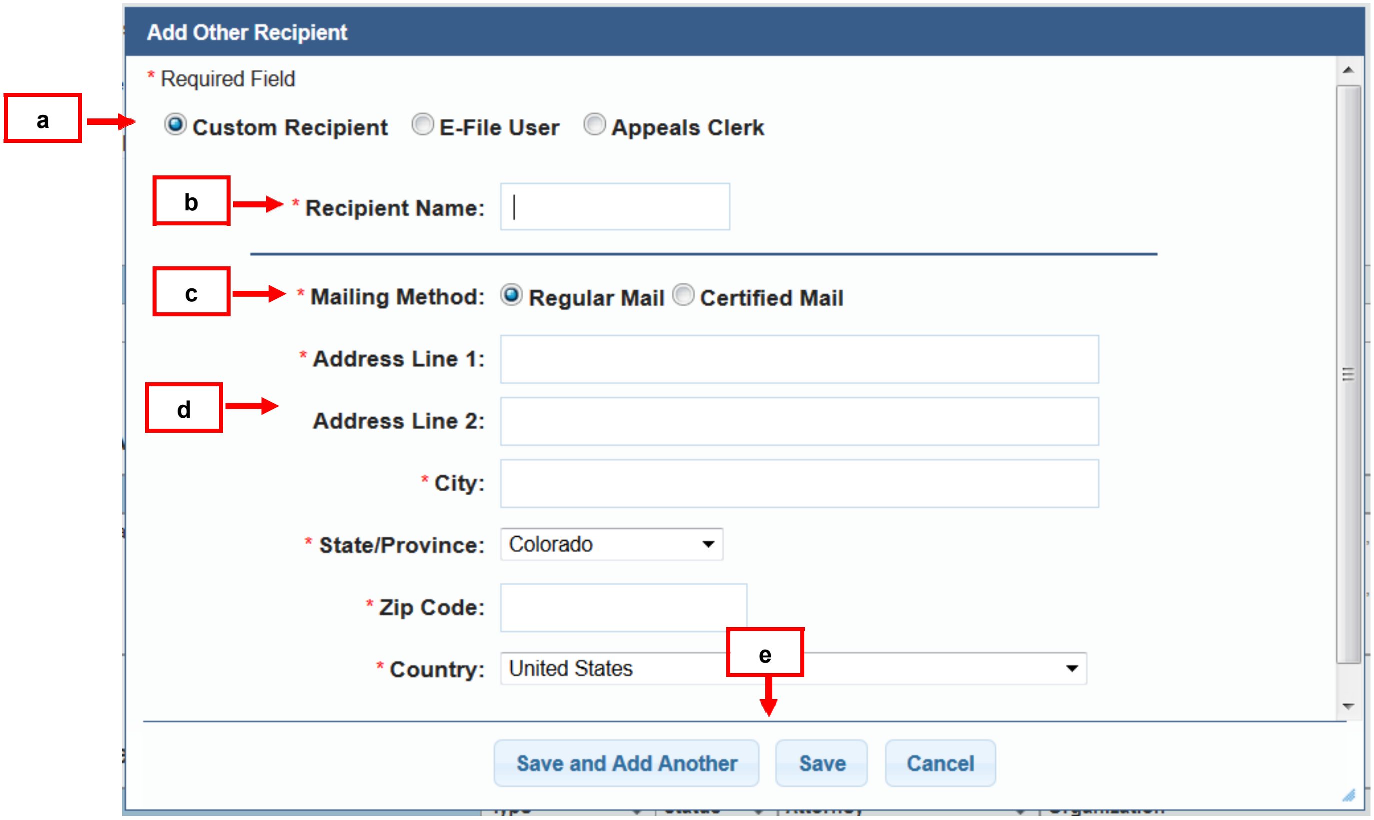
    a. To add an appeals clerk, Select “Add Other Recipient”.



9. Select the “Appeals Clerk” radio button and select from the dropdown.

    a. To save the information press “Save”, to exit and cancel click “Cancel”. To continue adding additional recipients, click “Save and Add Another”.

To include an Additional Recipient, click the “Add Other Recipient” button in the service screen. Add Other Recipient means an e-filer can ask the system to either mail or e-serve filings to another person whose name does not display on the Service screen.



For a custom recipient:

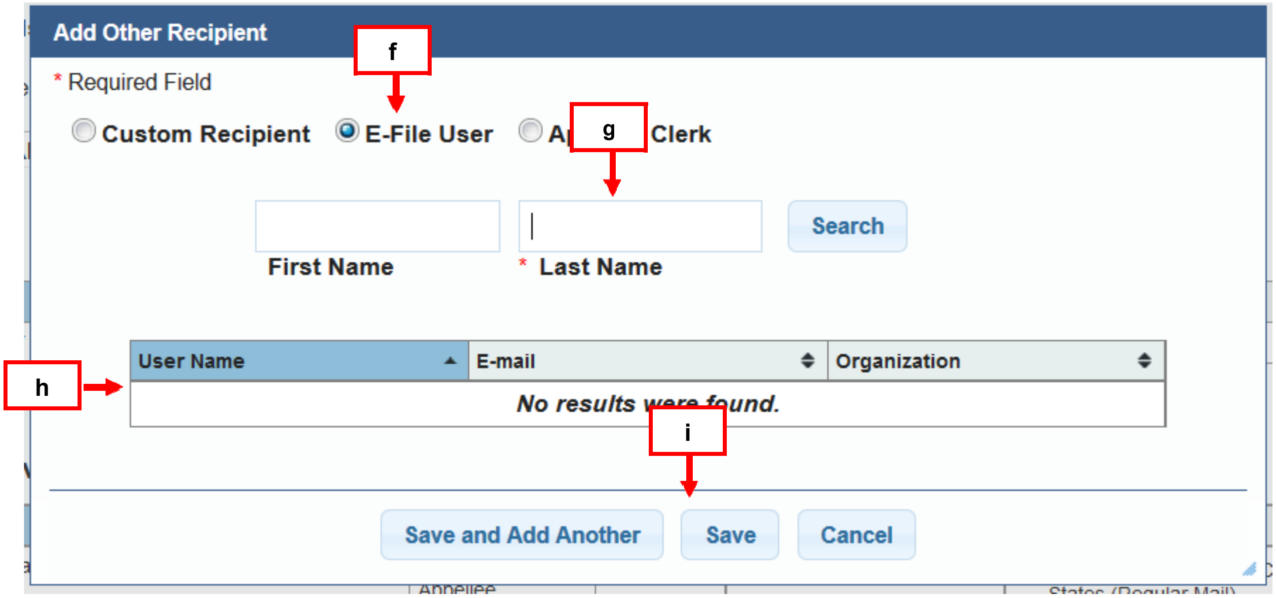
a. Click the “Custom Recipient” radio button.

b. Enter the recipient name.

c. Select “Mailing Method” of either “Regular Mail” or “Certified Mail”.

d. Enter the mailing address.

e. To save the information press “Save”, to exit and cancel click “Cancel”. To continue adding additional recipients, click “Save and Add Another”.



For an e-file user:

f. Click the "E-file User" radio button.

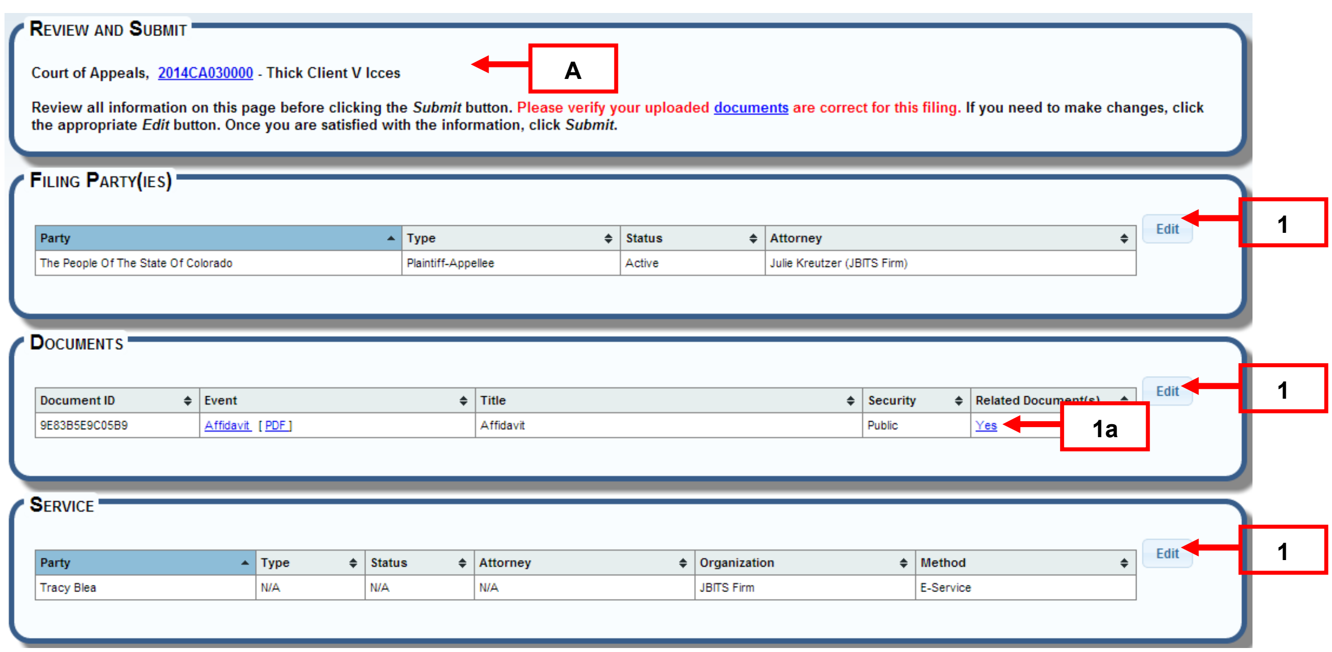
g. Enter the user's last name and press "Search."

h. Select the user name from the search result list.

i. To save the information press "Save", to exit and cancel click "Cancel". To continue adding additional recipients, click "Save and Add Another".

REVIEW AND SUBMIT

Review and submit is a summary of the current filing.



A. The county, case number and case caption display on the first line.

1. **Edit Buttons**: Review the Filing Party(ies), Documents, and Service sections. Click the "Edit" button on the right in any of these sections to change or update information.

a. If the "Relate" option was selected in the manage filing screen, the column "Related Document(s)" will have a "Yes" link to allow the user to confirm the related document(s).

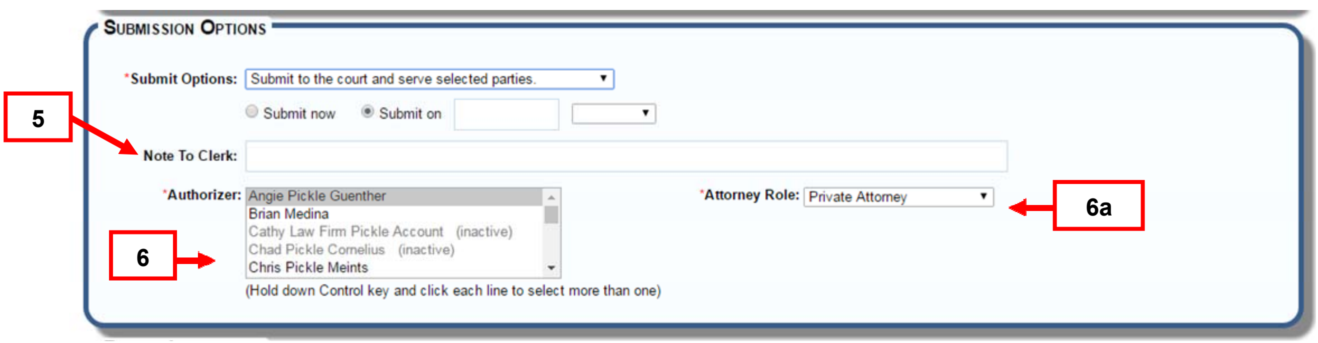
2. There are two Submit Options choices for submitting a filing(s) into an existing case.
   a. **Submit to the court and serve selected parties:** This will submit your filing to the court for clerk review.
   b. **Do not submit to the court, serve selected parties:** This will submit your filing as a serve only filing. This filing will not go to the court.

3. Leave "Submit now" selected to send the filing immediately.

4. To delay a filing to the court or to delay a "serve only" submission, postpone submitting by clicking the "Submit On" button.

    a. Select a future date from the pop up date box.

    b. Enter the time of day. The filing will be saved in Scheduled Filings.



5. Enter any *helpful* notes the court may need to process the filing.

6. Select the "Authorizer(s)" from your organization.

    a. Choose "Attorney Role."

7. If the filing is exempt from fees per Chief Justice Directive 06-01 or 98-01, select the appropriate box.

8. Enter any “Billing Reference” i.e. a specific organization billing reference.

9. Click “Submit” to complete your filing.

10. “Save and Close” saves the filing in “Drafts” so it can be finished later. Click “Drafts” on the “Filing” screen to resume the filing. Click “Cancel Filing” to exit the filing completely.

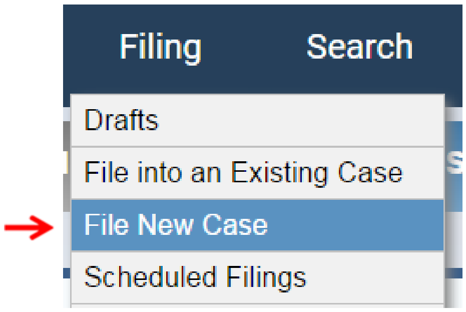
FILE NEW TRIAL COURT CASE

Choose the File New Case option to e-file a new case.

FILE NEW CASE– HOW TO FIND

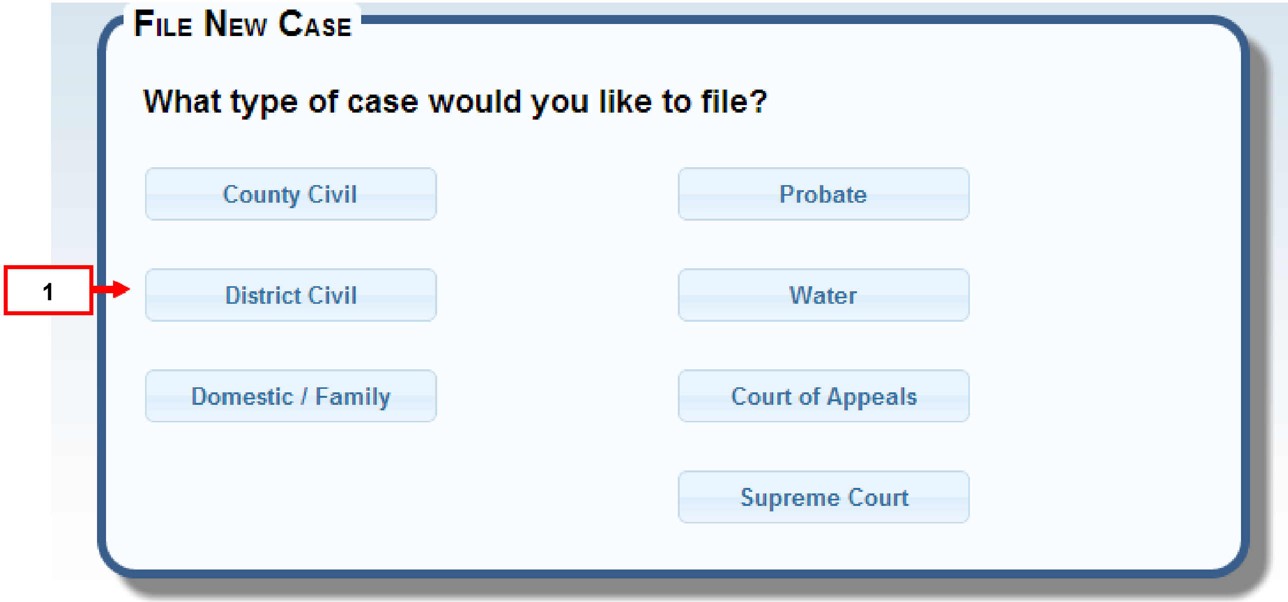
File a New Case

From the Filing screen, click the File a New Case hyperlink from the page menu, or

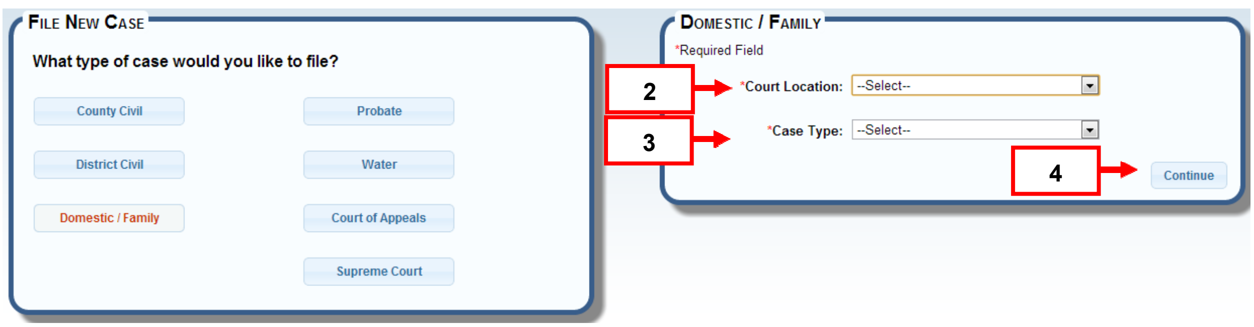


Hover over the **Filing** tab to choose a menu option.

FILE A NEW CASE – BUILD FILING



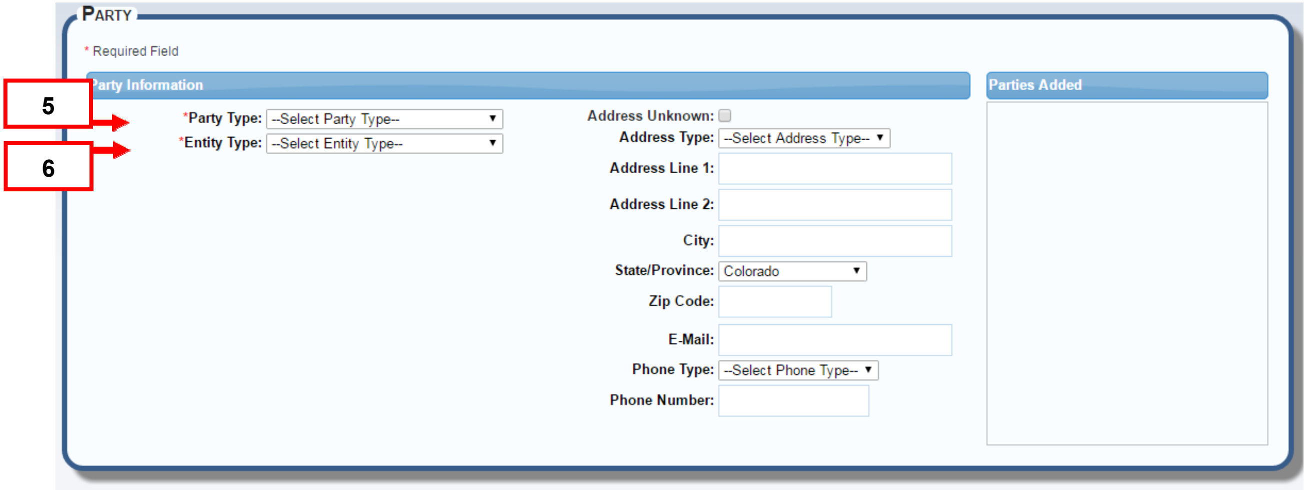
1. Click on the type of trial court case you wish to file.



FILE NEW TRIAL COURT CASE – CASE CLASS, COURT LOCATION AND CASE TYPE

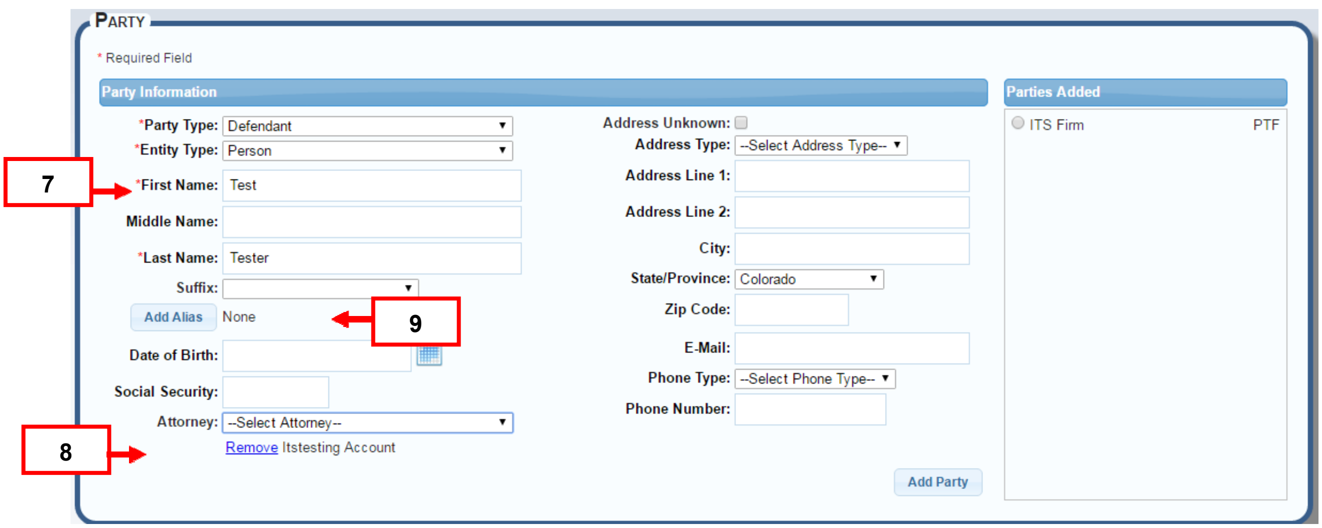
2. Click the arrow in the drop down list to display a list of choices. Highlight to select a "Court Location."
3. Click the arrow in the drop down list to display a list of choices. Highlight to select a "Case Type."
4. Press "Continue."

FILE NEW TRIAL COURT CASE – MANAGE CASE PARTIES



5. Select “Party Type” from dropdown list.

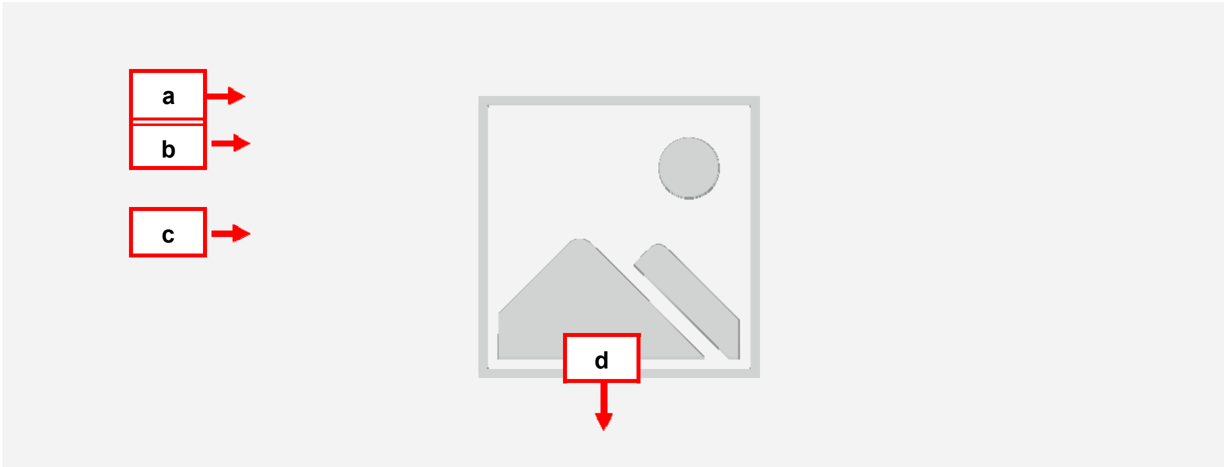
6. Select “Entity Type” from dropdown list.



7. Add all available party information. DOB and SSN will display for the court but not in the Colorado Courts E-Filing system.

8. Select an attorney.
   - The option to remove attorney is below the dropdown list.

9. If an Alias needs to be added, click the “Add Alias” button.
   - The option to “edit” an existing alias is below the “Add Alias” button.

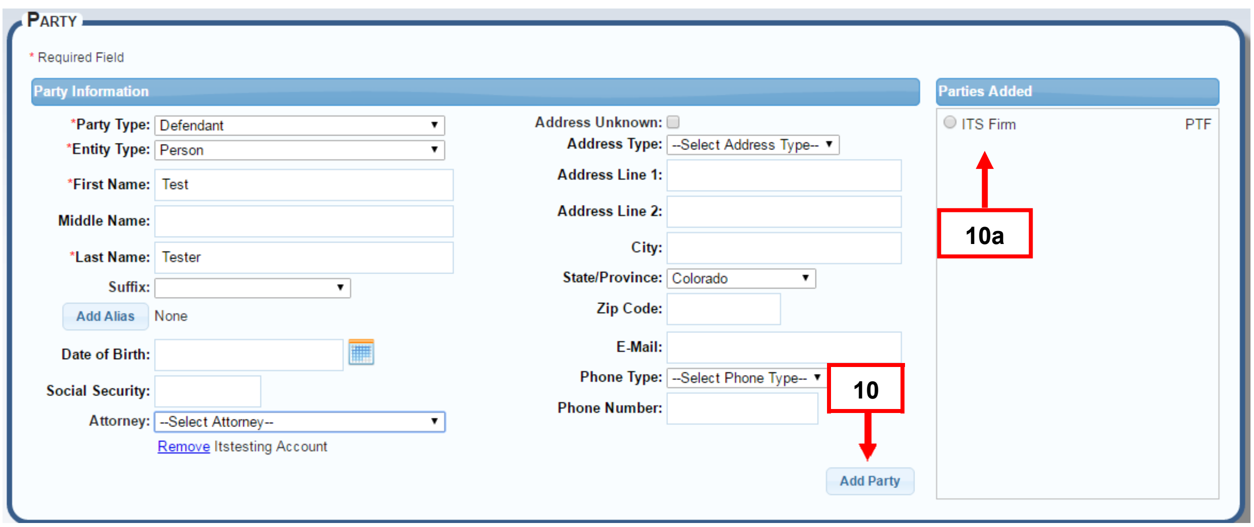


a. Select “Alias Type.”

b. Select “Entity Type.”

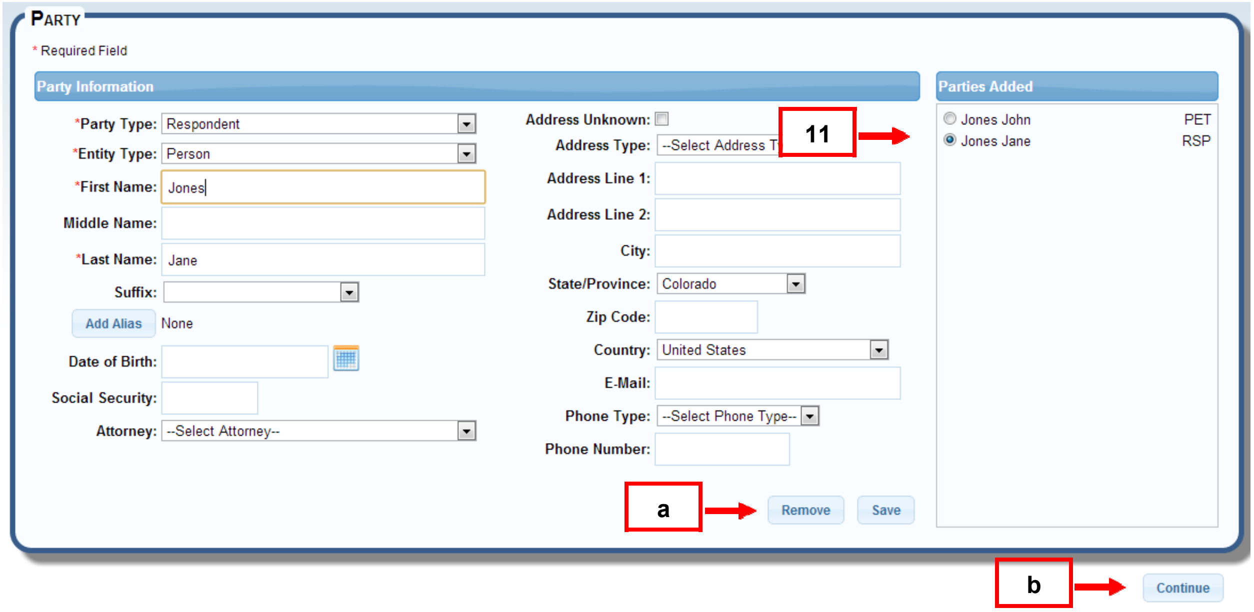
c. Complete all required fields.

d. Click the “Save” button, or click “Cancel” to exit “Add Alias” screen.



10. Once Party information is added, select the Add Party Button.

    a. Parties will appear under “Parties Added” on the right side.

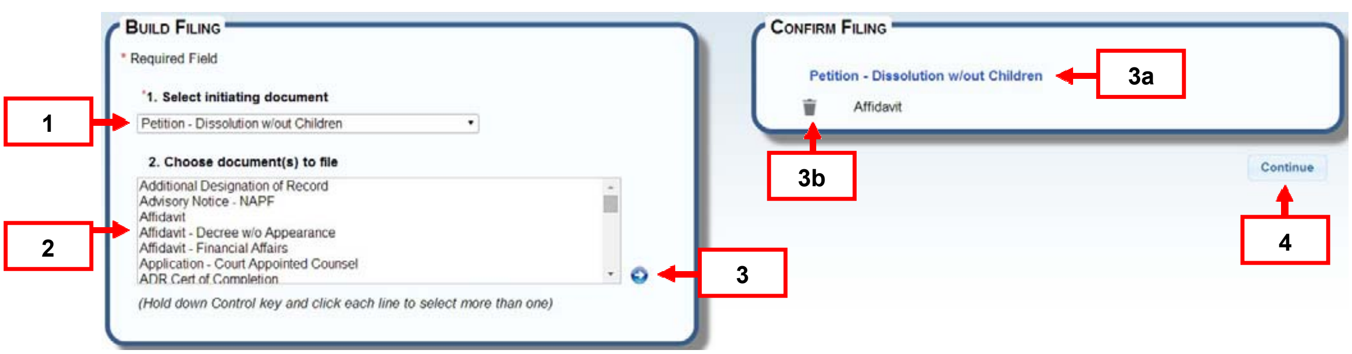


11. To edit or remove a party, select the radio button next to the party to edit. The Information previously added will fill in the fields and edits can begin.

   a. Once all information has been edited, select the “Save” button (or “Remove to remove party)

   b. Once all parties are added, select the “Continue” button to proceed.

FILE NEW TRIAL COURT CASE – FILE BUILDER



1. Select the initiating document.

2. To include additional documents for filing, select from the “Choose document(s) to file” list box.

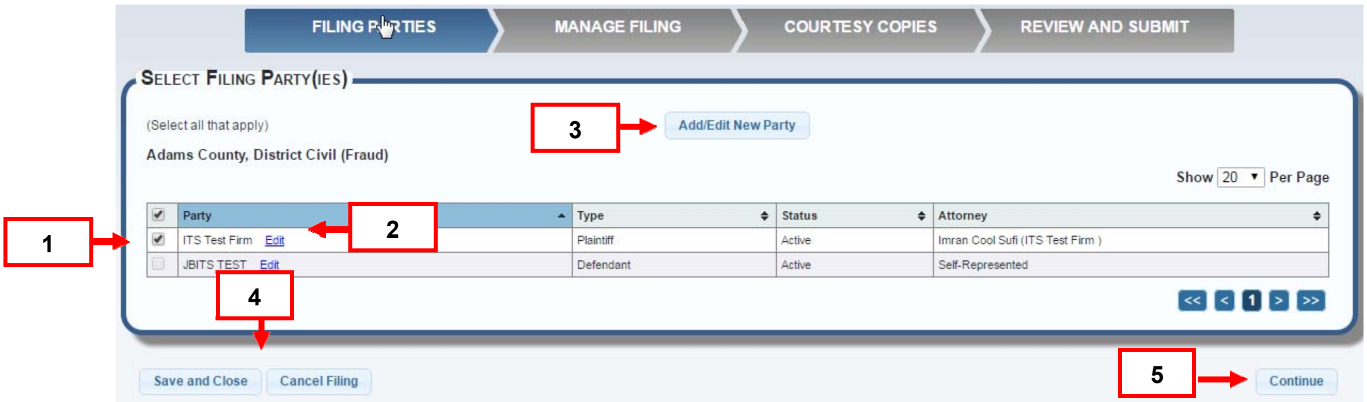
3. Press the blue arrow.

   a. The initiating document as well as any additional documents will display in “Confirm Filing.”

b. The option to remove any additional document(s) is available. Click on the *trash can* icon.

4. Click “Continue” button.

FILE NEW TRIAL COURT CASE – REVIEW FILING PARTIES



1. The e-filing system identifies the filing party(ies) by placing a checkmark next to the name in the table. If there is more than one filing party, each entry will be pre-populated with a check mark.

2. Edit party information or attach a forgotten attorney to a party by clicking the “Edit” link next to the party name. The original party screen displays for making edits. When edits are complete, press “Save” and then “Continue.”

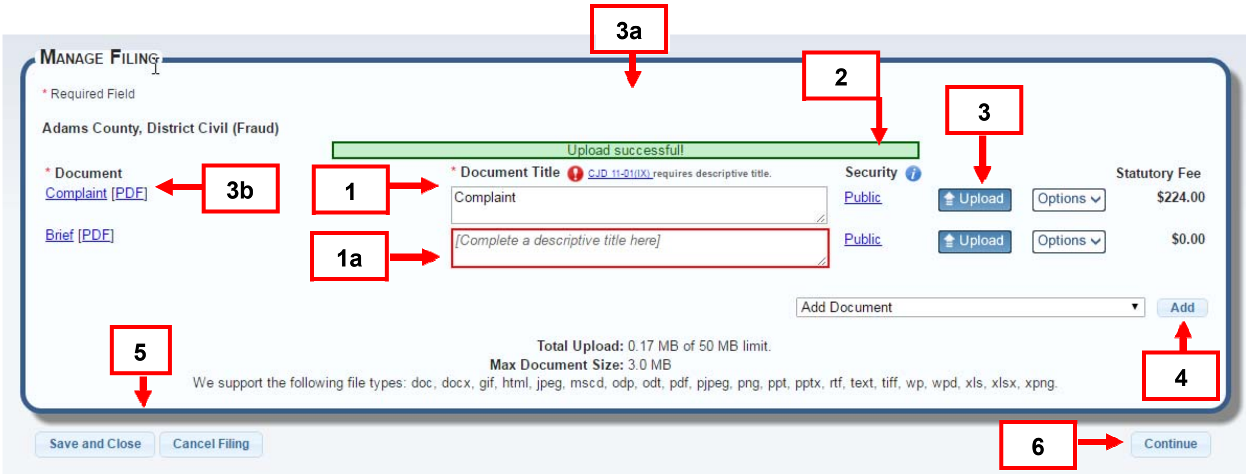
3. The option to add a new party is available by clicking the “Add/Edit New Party” button where a new party screen displays for entering new party details. When entry is finished, press “Add Party,” and then click the “Continue button.

4. Every screen in the File Builder features “Save and Close” and “Cancel Filing” buttons. “Save and Close” moves the item to Drafts. The “Cancel Filing” option closes the File Builder and does not save the filing.

5. Click “Continue” button.

FILE NEW TRIAL COURT CASE – MANAGE FILING – SECURITY, UPLOADING, AND ADDING EVENT

This section displays how filings can be added, edited and uploaded.



2. The **document title can be edited** if needed or required.
   a. Chief Justice Directive 11-01(IX) requires descriptive document titles. The system will highlight titles that need further description in red.

3. To change the security default of "Public" click on the security link under *Security. (Certain documents have a default level of security higher than "Public" and will prevent you from lowering that status)

   a. The available security levels, from least to most restrictive are:

      - Public: Any user can view the document.

      - Protected: Any user can view the document following redaction. Before redaction, only judges, court and Judicial Department staff, and parties to the case (including parties' attorneys) can view a protected document.

      - Suppressed: Judges, court and Judicial Department staff, and parties to the case (including parties' attorneys) can view a suppressed document.

- Restricted: Judges, court and Judicial Department staff, parties to the case (including parties' attorneys), and criminal justice agencies can view a restricted document.
- Private: Only the filing party and served parties can view a restricted/private document.
- Sealed: Only judges and court/Judicial Department staff can view a sealed document. No other party, including parties to the case, have access to a sealed document.

b. If the security is changed from the default selection, a reason for the security change will be required for the court. Selected security is not official until accepted by the court.

4. Click the upload button to upload a document. Double click the document from your folder list, or highlight it and press "Open."

   a. A green status bar flashes confirming your upload.

   b. The documents under *Event are now a link. Click the event link to review the document. Note: Each document must be uploaded separately.

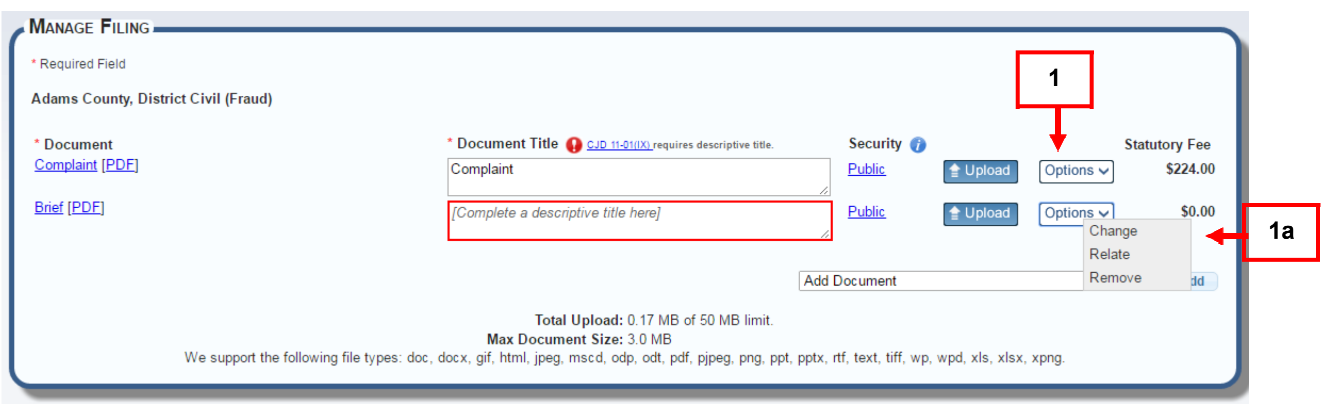
5. Include any missed filings by clicking the arrow in the "Add Event" box. Highlight and select the new filing event, and click the "Add" button to add additional event.

   a. Repeat step 3 to upload.

6. Every screen on the File Builder features "Save and Close" and "Cancel Filing" options. "Save and Close" moves the item to "Drafts." The "Cancel Filing" option closes the File Builder and does not save the filing.

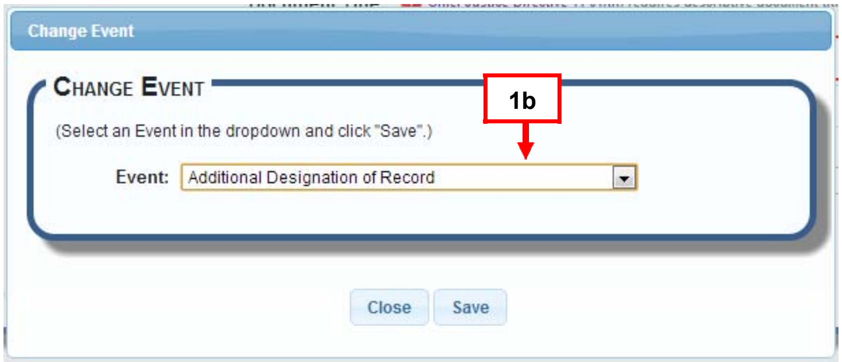
7. Press "Continue."

MANAGE FILING – CHANGE EVENT, RELATE AND REMOVE DOCUMENTS



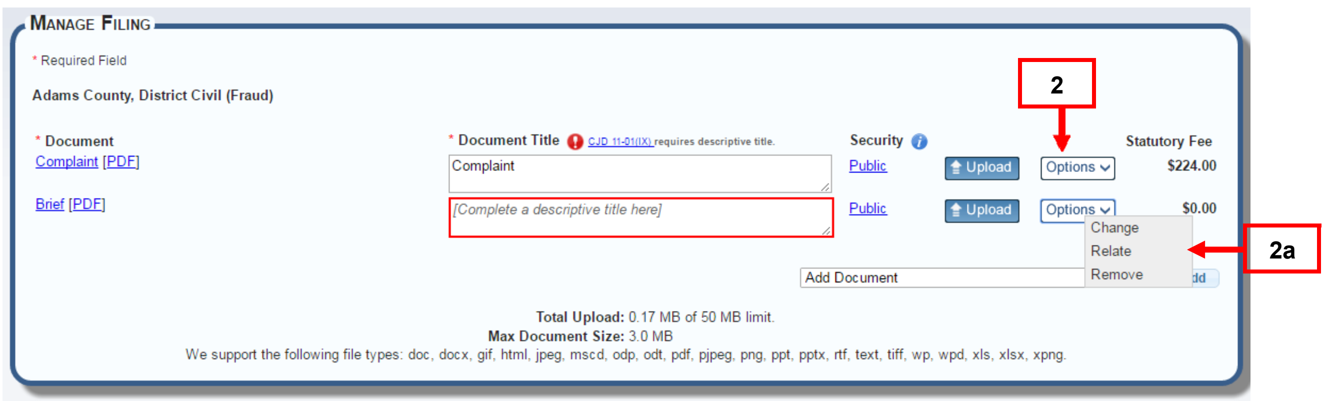
1. To change an event type entered incorrectly, click the Options menu.

   a. Choose **Change.**

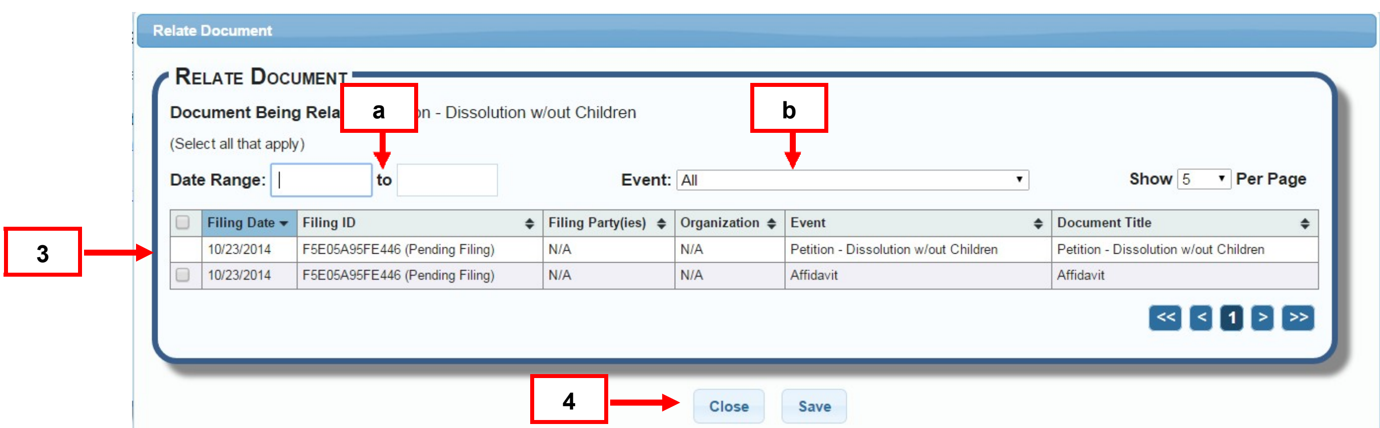


b. From the pop up, select a new event from the dropdown and click "Save" to make the change or "Close" to cancel.

WARNING: If a document was uploaded to match the original document selected, make sure the correct document matches the change that is made. If you need to re-upload a corrected document, select upload to overwrite the existing uploaded document.



2. Relate a document by selecting the Options menu.
   a. Choose Relate.

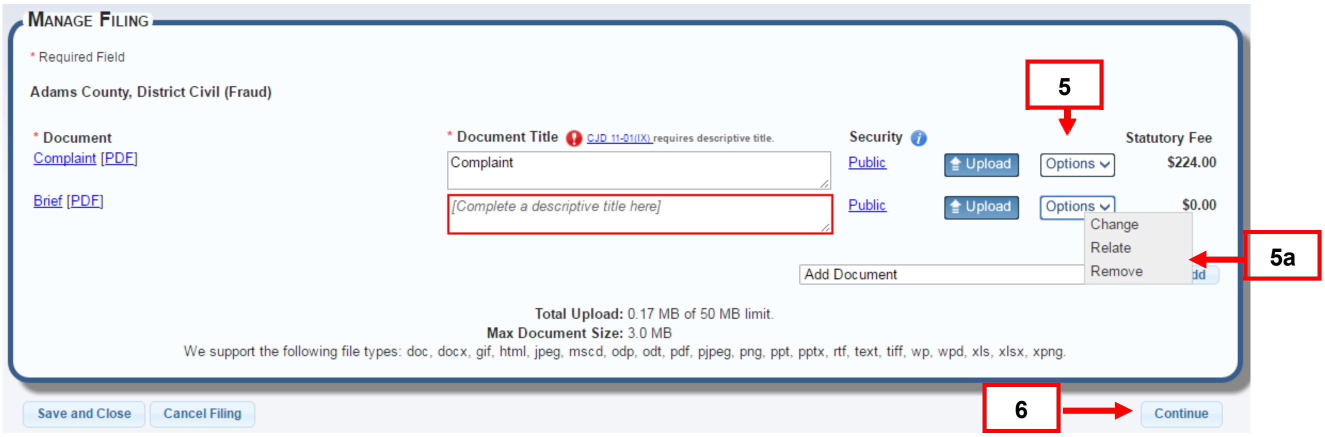


3. A Relate Document table displays listing all case filing events added in the filing. Click the checkbox to relate an item.

   a. Filter the table from the filing date. Click in the date range boxes to select.

b. Filter the table for case events. Click the arrow, highlight and select an event.

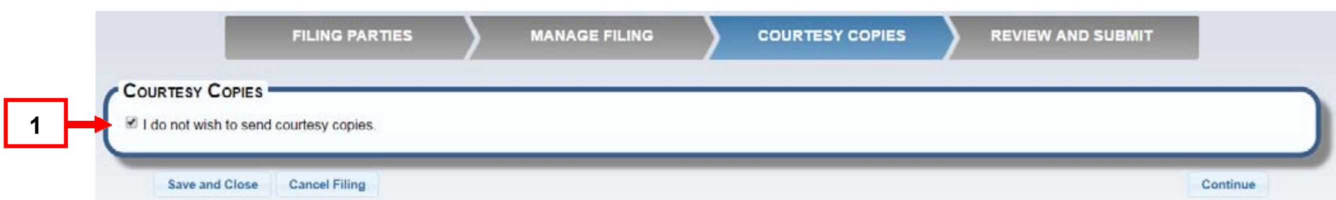
4. Click the “Save” button to save. The “Close” button cancels the screen without saving changes.



5. Remove any document from the Manage Filing screen (Does not include initiating documents for File New Case) by clicking the Options.
   a. Select **Remove**. If a document is related to main document, it will also be removed.

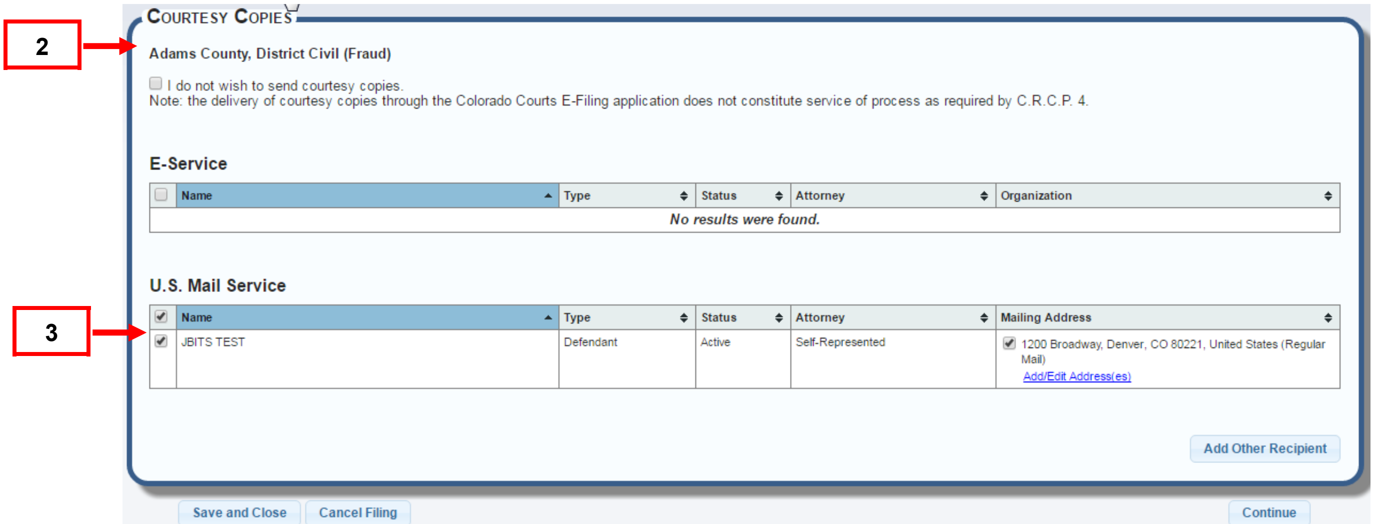
6. Once all documents have been uploaded, press **Continue**.

FILE NEW TRIAL COURT CASE - COURTESY COPIES



1. Sending courtesy copies of e-filed documents in a new case filing is a courtesy. (Note: the delivery of courtesy copies through the Colorado Courts E-Filing system does not constitute service of process as required by C.R.C.P. 4)

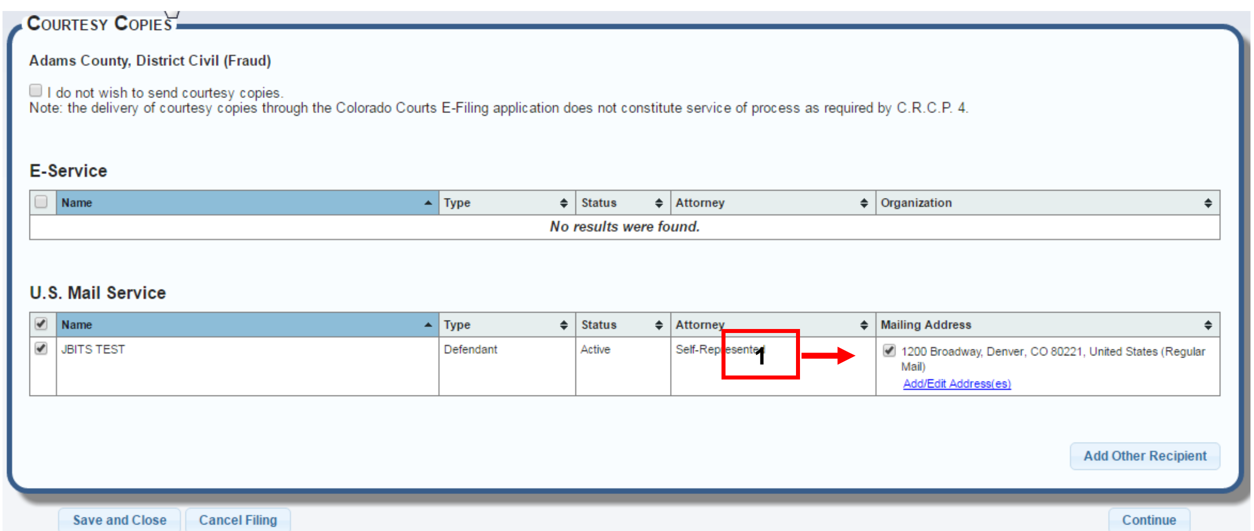
   Leave the checkmark in the “I do not wish to send courtesy copies through the Colorado Courts E-Filing system” checkbox if courtesy copies are not requested.



2. In order for the system to mail courtesy copies, uncheck the “I do not wish to send courtesy copies through the Colorado Courts E-Filing system” checkbox. The screen will expand to show the parties in the case.

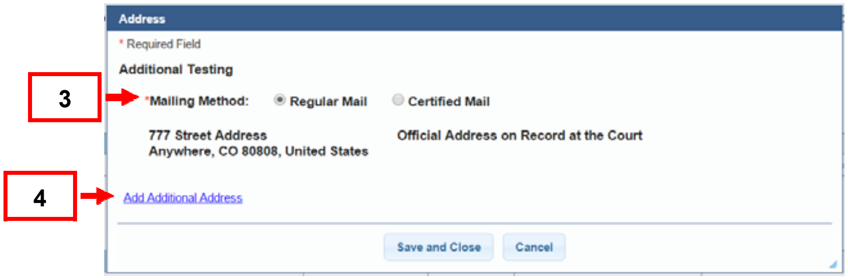
3. Check the parties you want to mail a courtesy copy to either individually or if all parties, select the checkbox at the top of the checkbox column. The default does not check any recipients. If the checkbox remains unchecked, the system will not mail courtesy copies.

Note: The courtesy copy feature in the File New Case file builder does not constitute service of process as required by C.R.C.P. 4.



1. If an address was added while adding the party, the address will auto-check.
    - This address cannot be edited unless you go back to the party screen and select edit, however you can change the mailing method to “Certified Mail”.

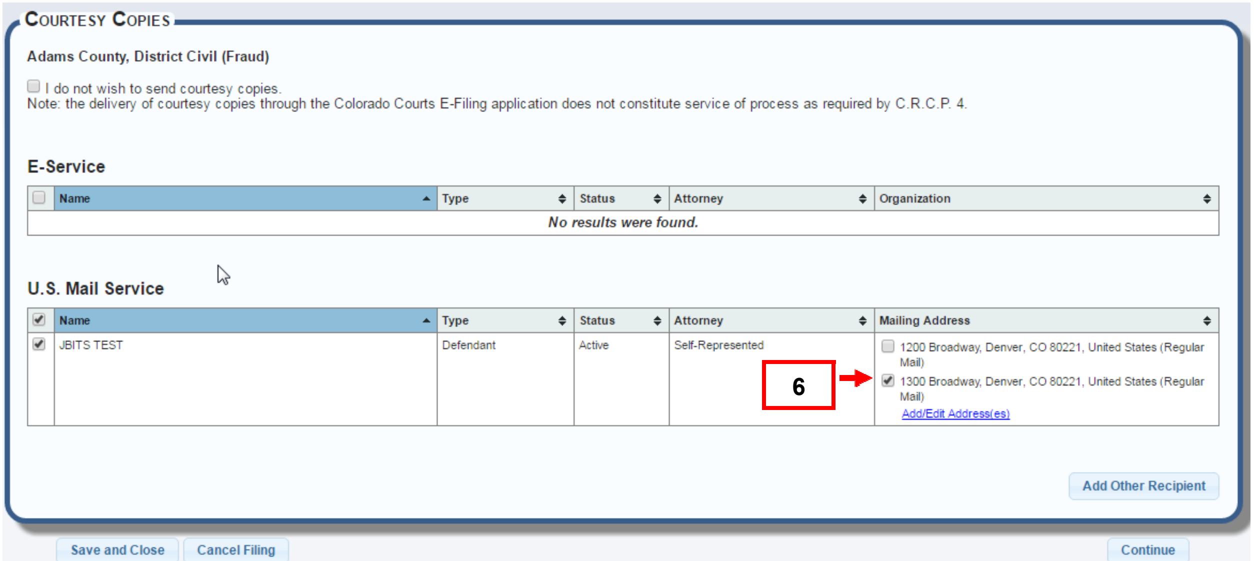
2. To change regular mailing to certified mailing, select the “Add/Edit Address(es)” link to the right of the party name.



3. A pop up will appear “Regular Mail” is auto-selected. Change by selecting radio button for Certified Mailing and press “Save and Close”.
4. If adding an additional address, select the “Add Additional Address” link.

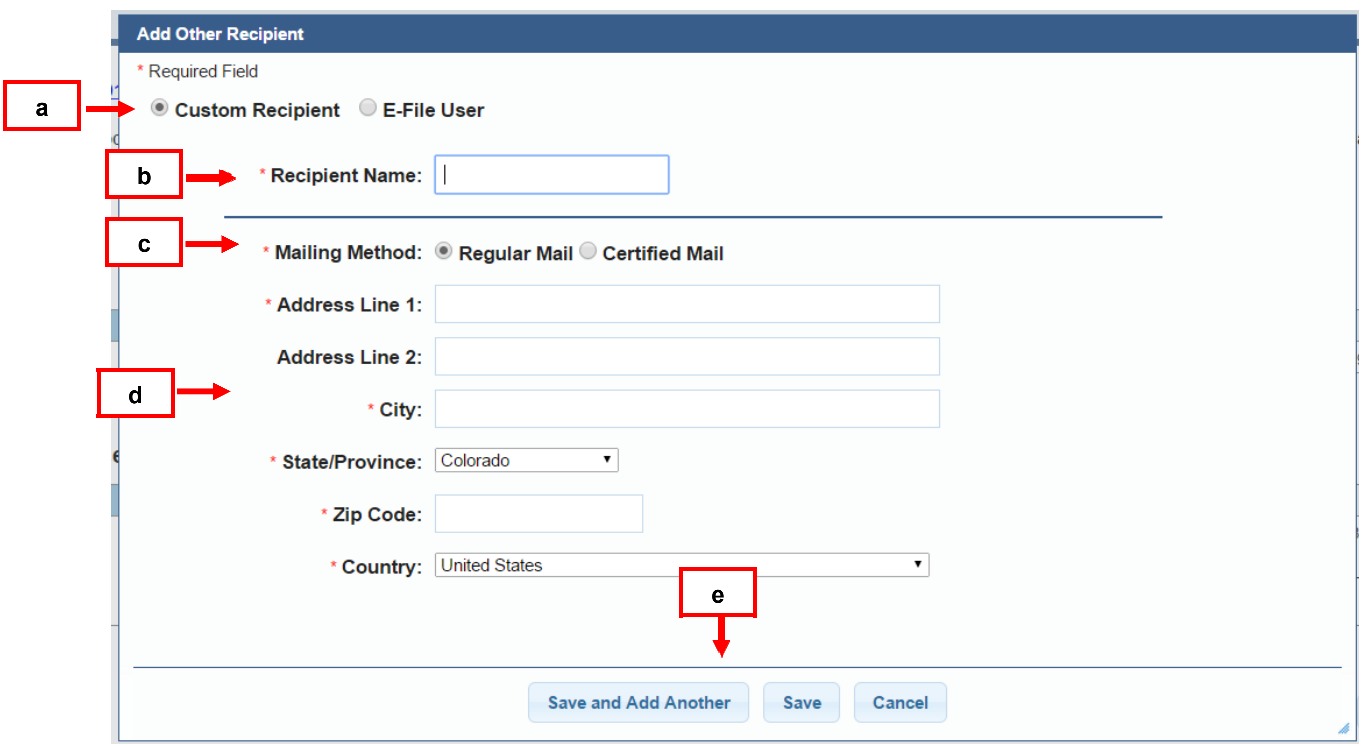
5. Fill out all required fields:
    a. To add more than one, select “Add Address” button. This will also allow you to edit address just added.

b. OR Press “Save and Close” to add address and go back to the service screen.



6. The last address added will auto-check. If multiple addresses needed for mailing, check any additional addresses listed.

To include an Additional Recipient, click the “Add Other Recipient” button in the service screen. Add Other Recipient means an e-filer can ask the system to either mail or e-serve filings to another person whose name does not display on the Service screen.



For a custom recipient:

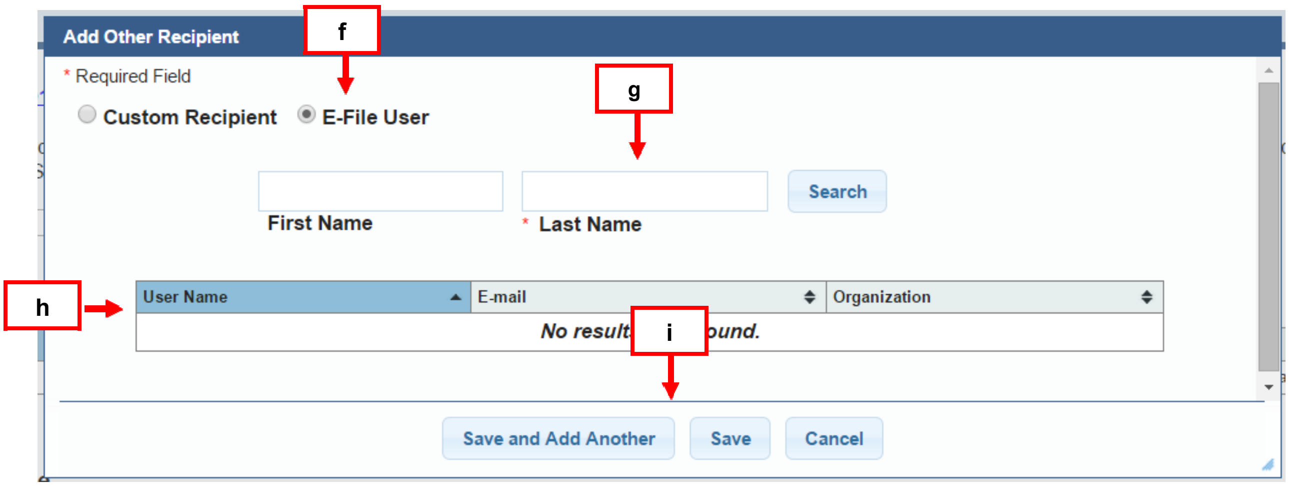
a. Click the “Custom Recipient” radio button.

b. Enter the recipient name.

c. Select “Mailing Method” of either “Certified Mail” or “US Mail.”

d. Enter the mailing address.

e. To save the information press “Save”, to exit and cancel click “Cancel”. To continue adding additional recipients, click “Save and Add Another”.



For an e-file user:

f. Click the “E-file User” radio button.

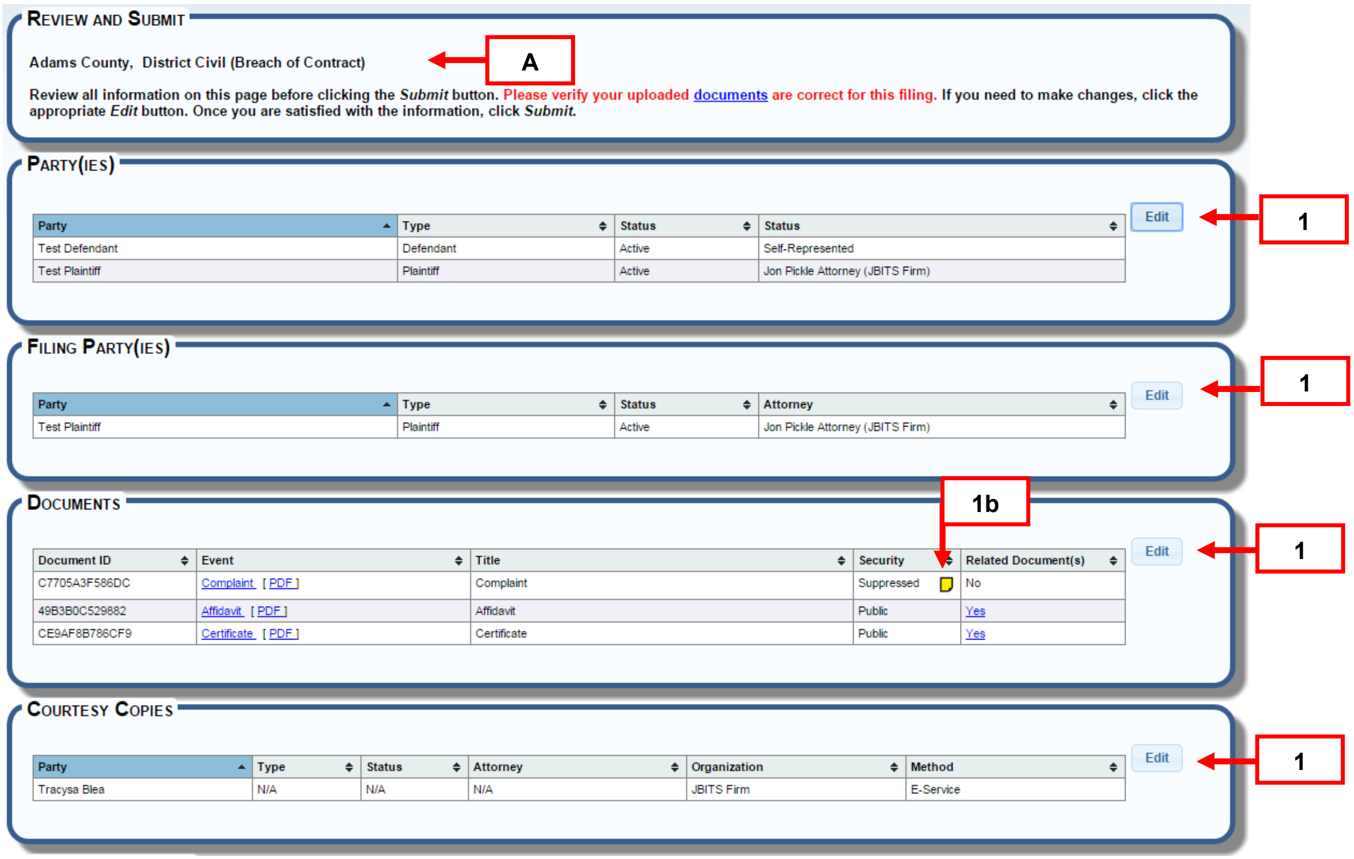
g. Enter the user’s last name and press “Search.”

h. Select the user name from the search result list.

i. To save the information press “Save”, to exit and cancel click “Cancel”. To continue adding additional recipients, click “Save and Add Another”.

REVIEW AND SUBMIT

Review and Submit screen is a summary of the new case filing.

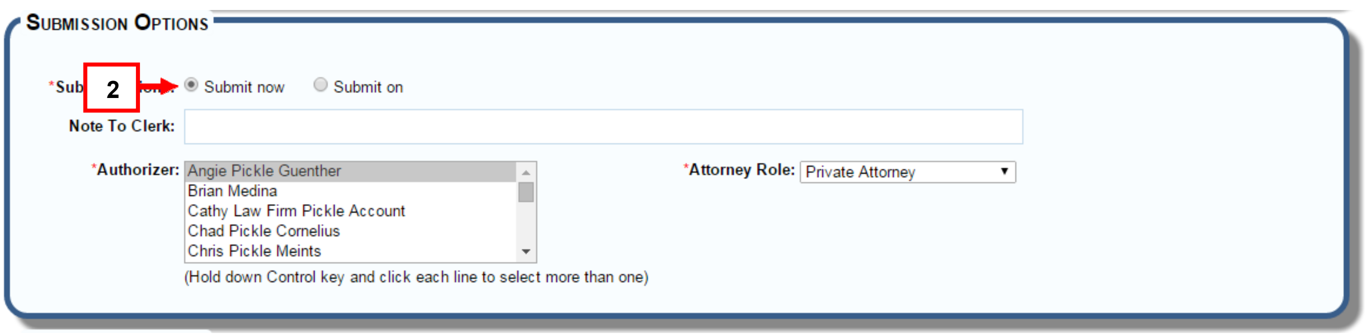


A. The county, case class and case type display.

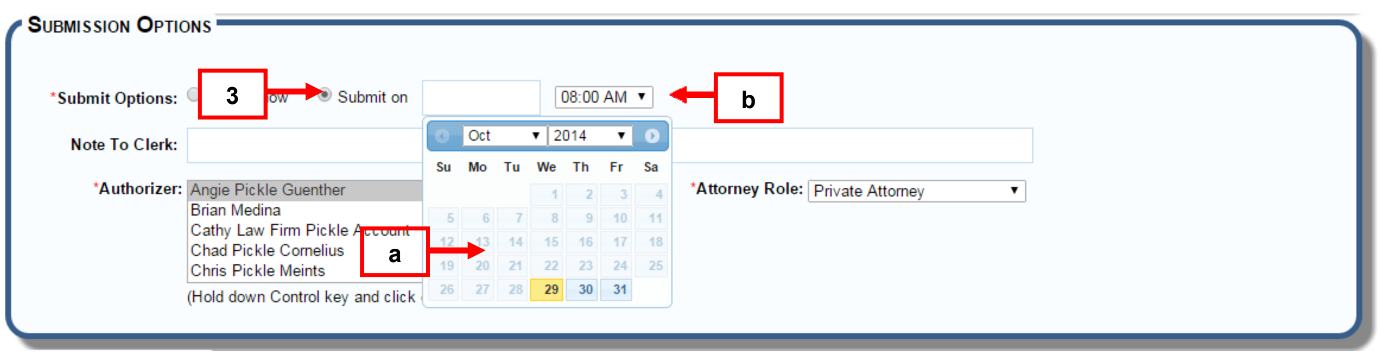
1. Review the Filing Party(ies), Documents, and Courtesy Copies sections. Click the “Edit” button on the right of each section to change or update information.

a. If the “Relate” option was selected in the manage filing screen, the column “Related Document(s)” will have a “Yes” link to allow the user to confirm the related document(s).

- If the Security was changed from the default in the manage filing screen, the column “Security” will have the new security setting and a “Note” icon to allow the user to confirm the reason for the security change.



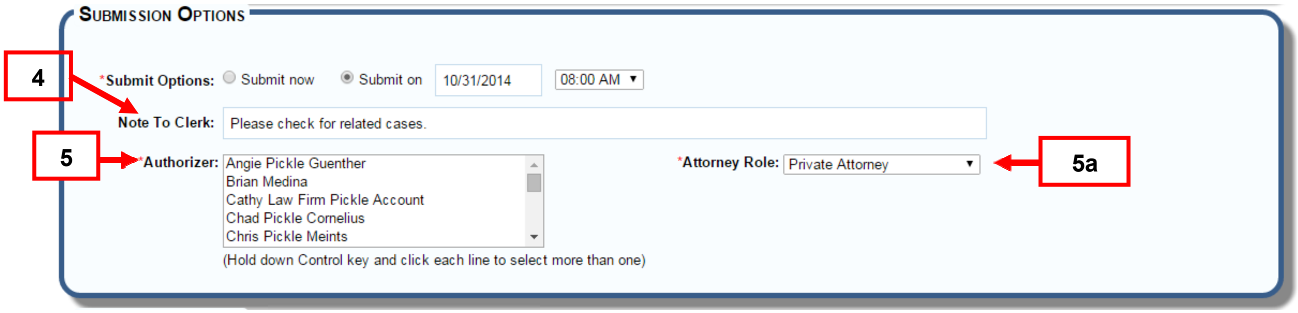
2. Leave “Submit now” selected to send the filing immediately.



3. To delay a filing to the court or to delay a “serve only” submission, postpone submitting by clicking the “Submit On” button.

   a. Select a future date from the pop up date box.

   b. Enter the time of day. The filing will be saved in Scheduled Filings.



4. Enter any *helpful* notes the court may need to process the filing.
5. Select the "Authorizer(s)" from your organization.
    a. Choose "Attorney Role."

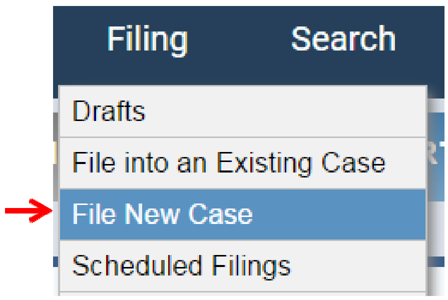
6. If the filing is exempt from fees per Chief Justice Directive 06-01 or 98-01, select the appropriate box.
7. Enter any "Billing Comments" i.e. an organization billing reference.
8. Click "Submit" to complete your filing.
9. "Save and Close" saves the filing in "Drafts" so it can be finished later. Click "Drafts" on the "Filing" screen to resume the filing. Click "Cancel Filing" to exit the filing completely.

FILE NEW APPEALS COURT CASE

Choose the File New Case option to e-file a new case.

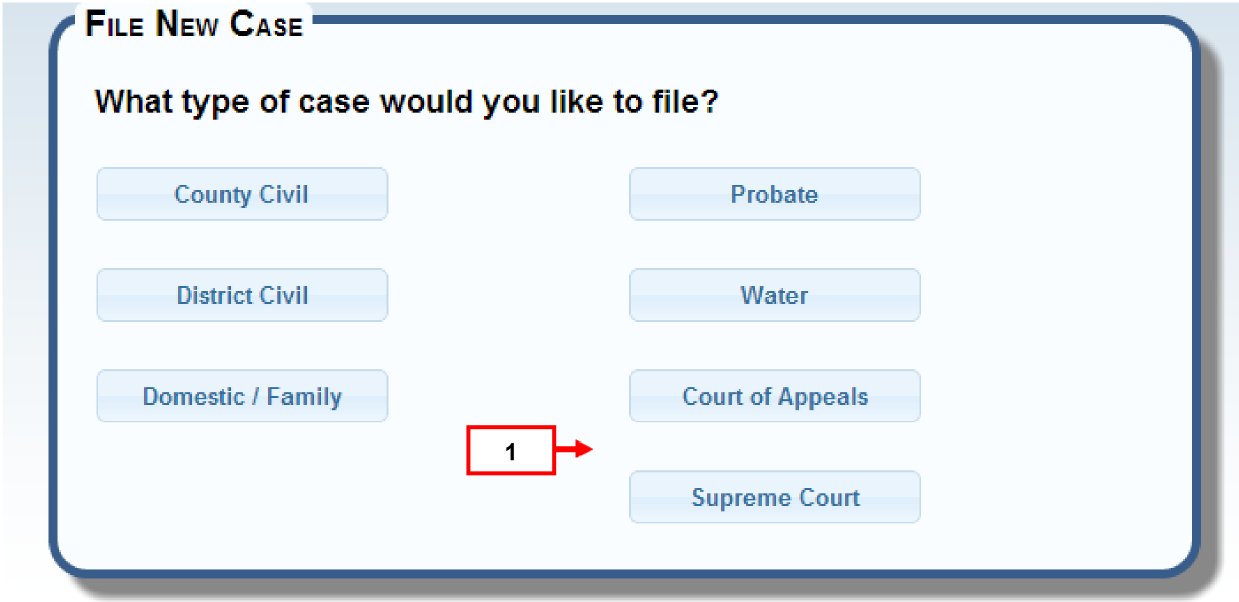
FILE NEW CASE– HOW TO FIND

Click the file folder on the Home page, or

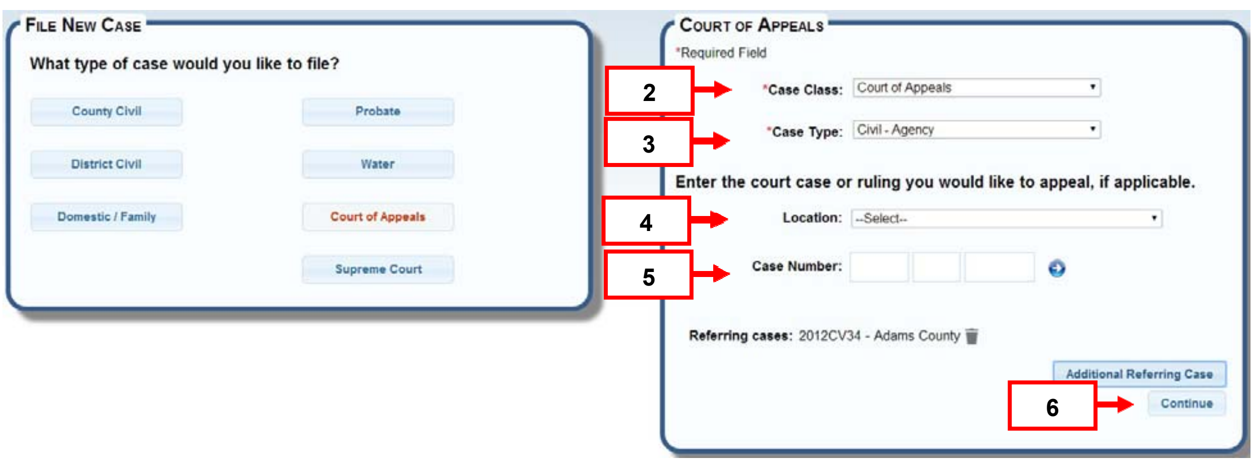


Hover over the **Filing** tab to choose a menu option.

FILE A NEW CASE – BUILD FILING



1. Select the Type of appeal you would like to file.



2. Click the arrow in the drop down list to display a list of choices. Highlight to select a "Case Class."
    a. Court of Appeals defaults as there is only one case class.
    b. Supreme Court has other options.

3. Click the arrow in the drop down list to display a list of choices. Highlight to select a "Case Type."

4. To add a referring case, click the arrow in the drop down list to display a list of locations, highlight to select a "Location."

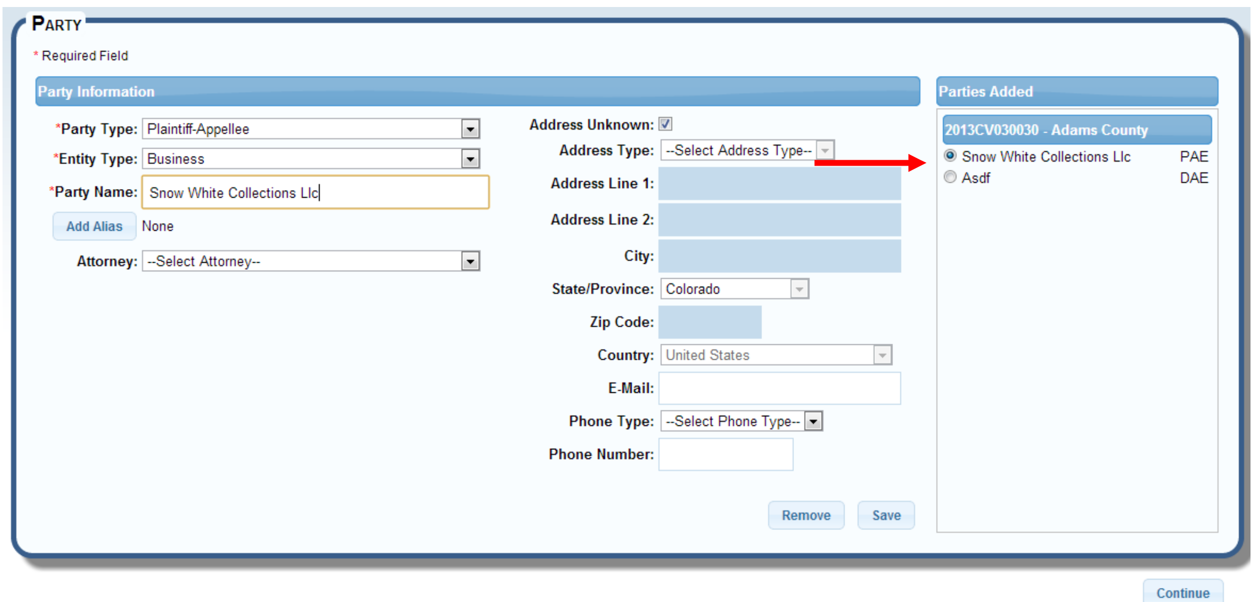
5. Case Number: If the referring case is a trial court location, enter the case number from that trial court. Case year, case class and sequence number.
    a. Click the blue arrow button to display the case caption.

    b. If the referring case is not a trial court location, once the location is selected, at minimum a sequence number is required in the case number field.

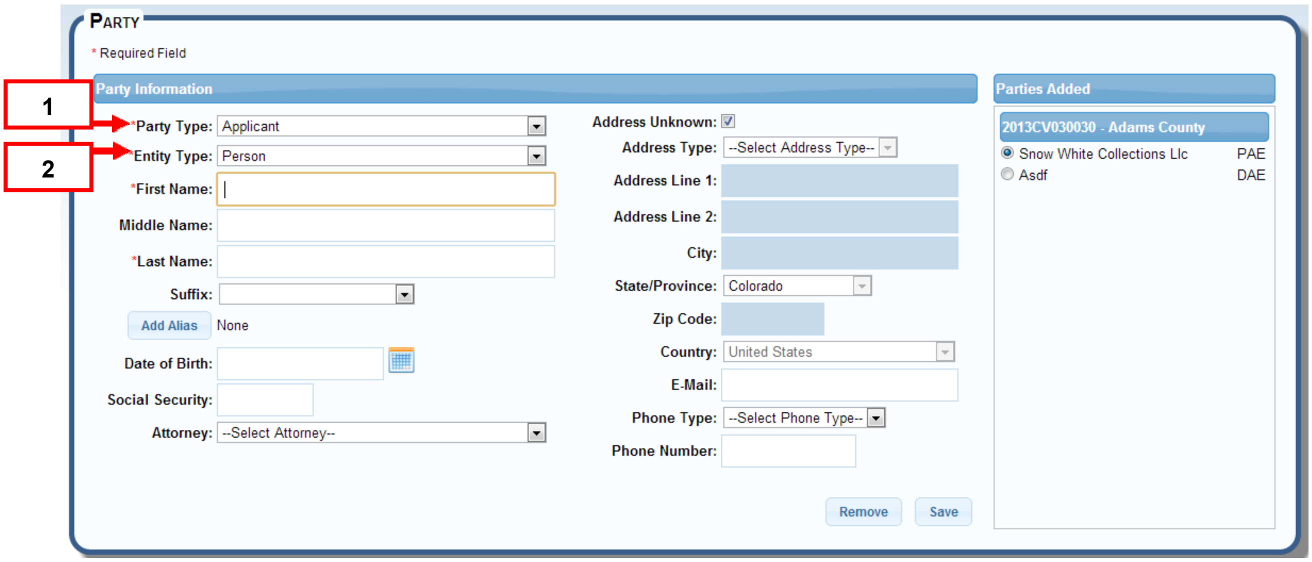
6. Press “Continue.”

FILE NEW APPEALS COURT CASE – MANAGE CASE PARTIES

If a referring case from a lower court is entered, the party information will import from that case.

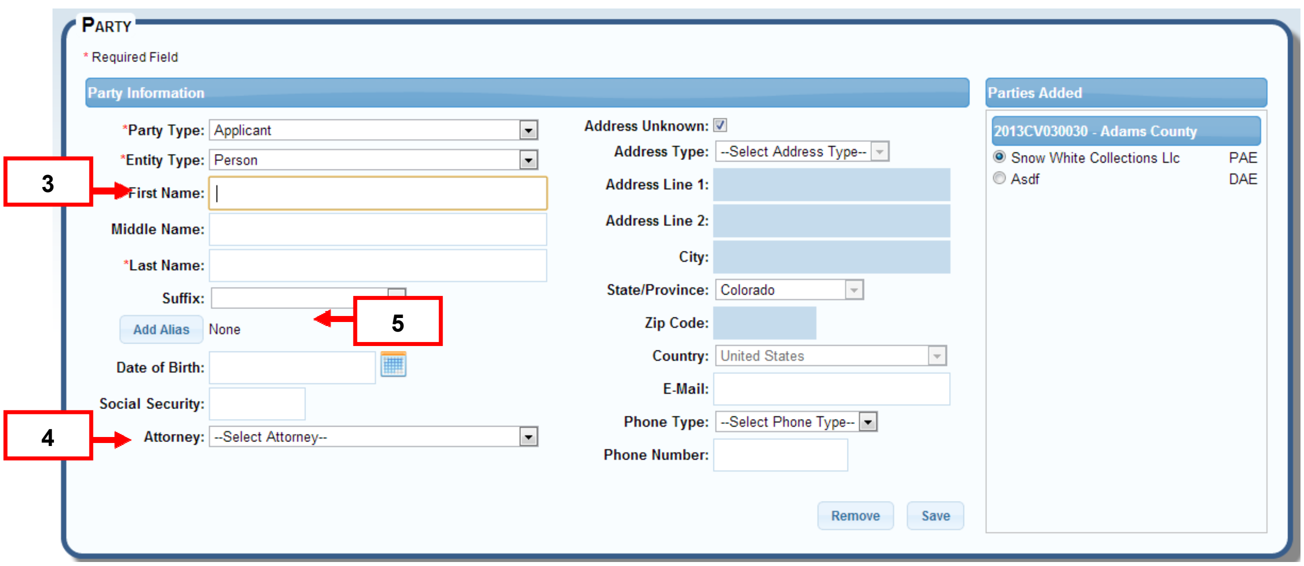


ADD PARTIES TO NEW APPEALS COURT CASE – MANAGE CASE PARTIES



1. Select "Party Type" from dropdown list.

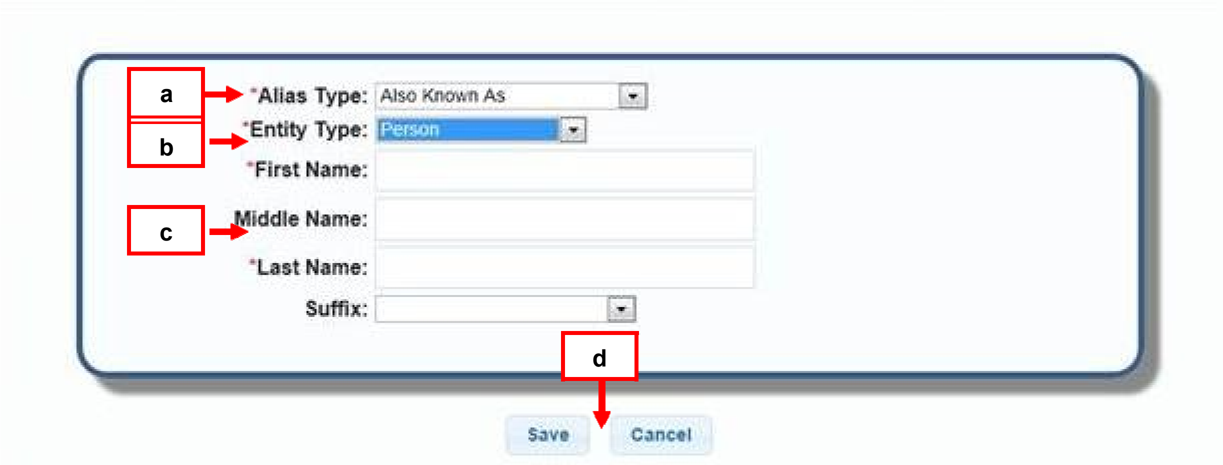
2. Select "Entity Type" from dropdown list.



3. Add all available party information. DOB and SSN will display for the court but not in The Colorado Courts E-Filing system.

4. Select an attorney (where applicable).
   - o The option to remove attorney will appear below the dropdown list.

5. If an Alias needs to be added, click the "Add Alias" button.
   - o The option to "edit" an existing alias is below the "Add Alias" button.

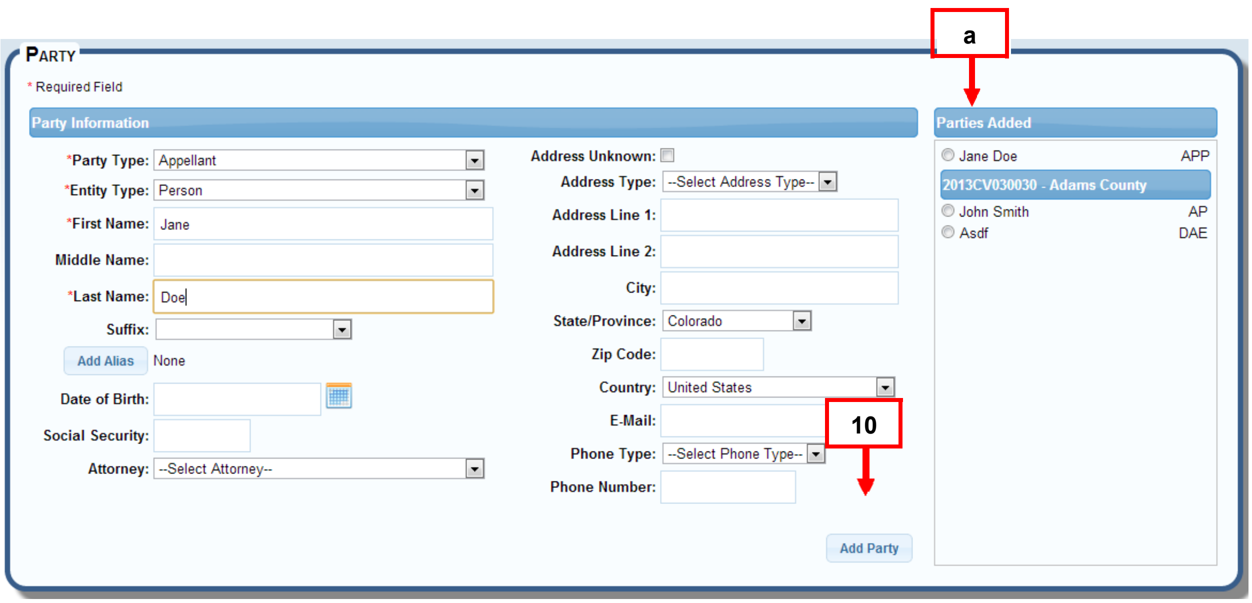


a. Select "Alias Type."

b. Select "Entity Type."

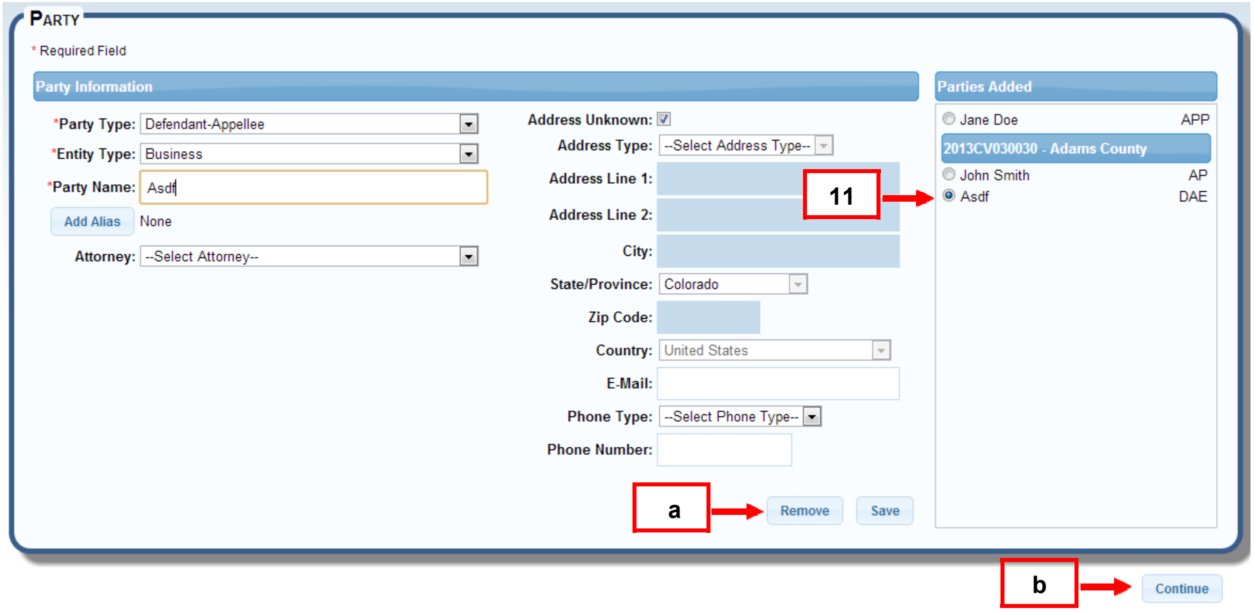
c. Complete all required fields.

d. Click the "Save" button, or click "Cancel" to exit "Add Alias" screen.



10. Once Party information is added, select the Add Party Button.

    a. Parties will appear under "Parties Added" on the right side.

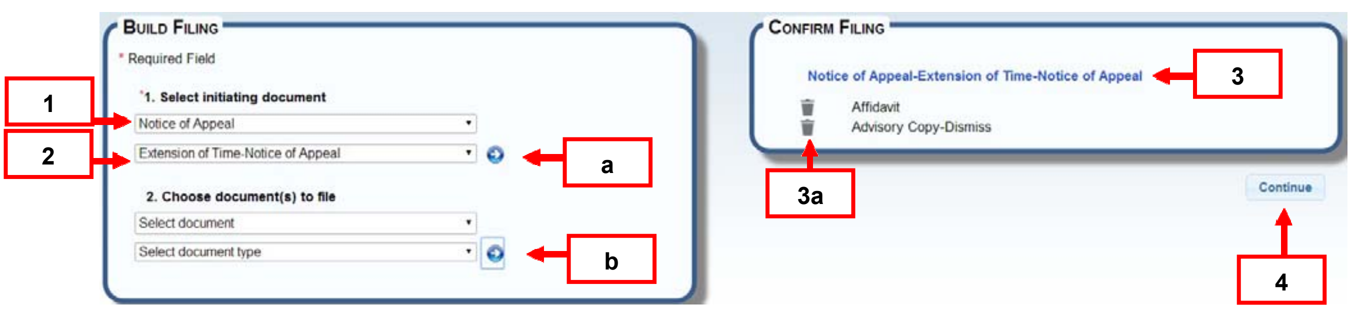


11. To edit or remove a party, select the radio button next to the party to edit, this includes any parties that were part of the referring case. The information previously added will fill in the fields and edits can begin.

    a. Once all information has been edited, select the save button (or remove to remove party).

    b. Once all parties are added/edited, select the "Continue" button to proceed.

FILE NEW APPEALS COURT CASE – FILE BUILDER



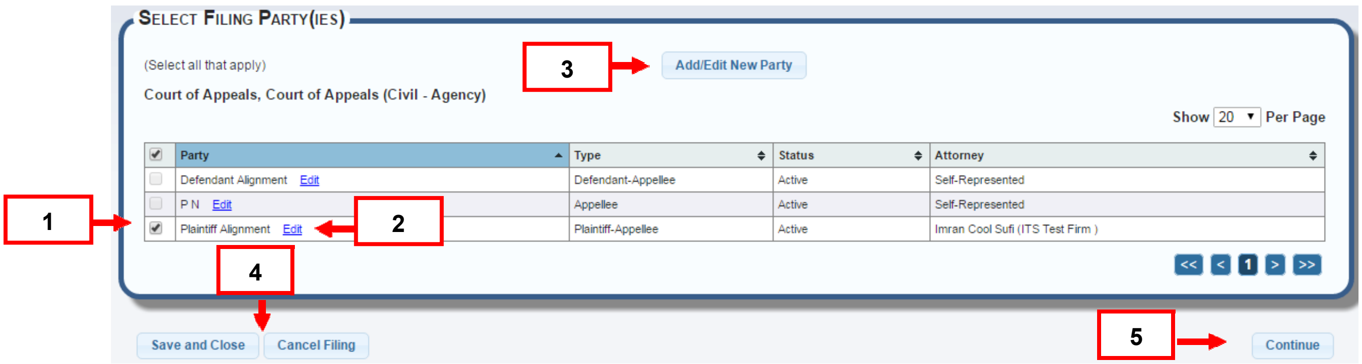
1. Select the initiating document.
    a. "Document Type" is an option and not required.
    b. Press the blue arrow.

2. To include additional documents for filing, select from the "Choose document(s) to file" list box.
    a. "Document Type" is an option.
    b. Press the blue arrow.

3. The initiating document as well as any additional documents will display in "Confirm Filing."
    a. The option to remove any additional document(s) is available. Click on the *trash can* icon.

4. Click "Continue" button.

FILE NEW APPEALS COURT CASE – REVIEW FILING PARTIES



1. The system identifies the filing party(ies) by placing a checkmark next to the name in the table. If there is more than one filing party, each entry will be pre-populated with a check mark.

2. Edit party information or attach a forgotten attorney to a party by clicking the "Edit" link next to the party name. The original party screen displays for making edits. When edits are complete, press "Save" and then "Continue."

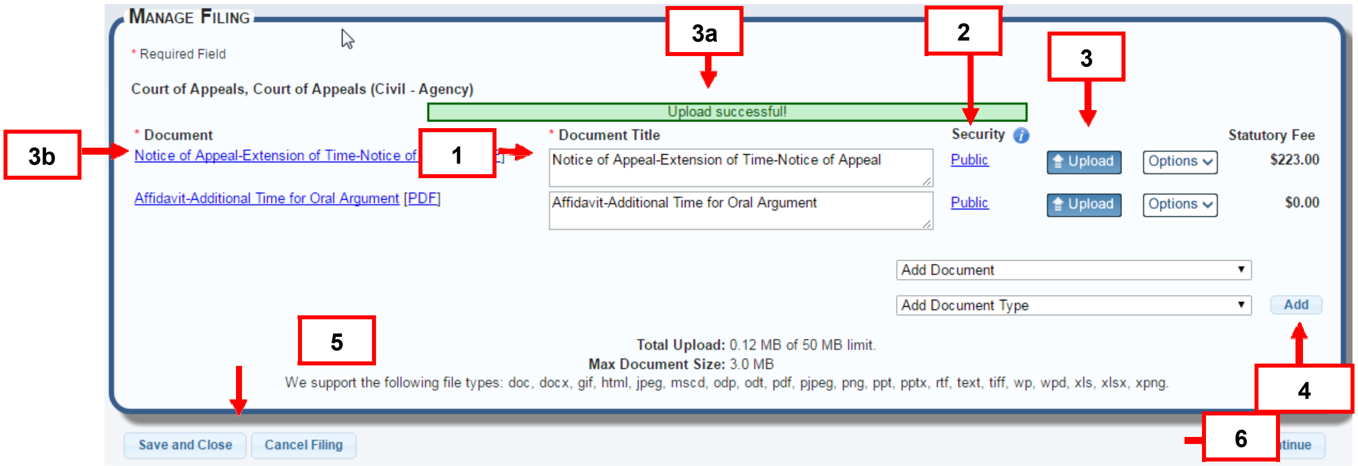
3. The option to add a new party is available by clicking the "Add/Edit New Party" button where a new party screen displays for entering new party details. When entry is finished, press "Add Party," and then click the "Continue button.

4. Every screen in the File Builder features "Save and Close" and "Cancel Filing" buttons. "Save and Close" moves the item to Drafts. The "Cancel Filing" option closes the File Builder and does not save the filing.

5. Click "Continue" button.

FILE NEW APPEALS COURT CASE – MANAGE FILING – SECURITY, UPLOADING, AND ADDING EVENT

This section displays how filings can be added, edited and uploaded.



1. The Document Title **can be edited** if needed.
2. To change the security default of "Public" click on the security link under *Security. (Certain documents have a default level of security higher than "Public" and will prevent you from lowering that status) Selected security is not official until accepted by the court. *A note to the clerk in "Review in Submit" screen is advisable if security is changed.*

The available security levels, from least to most restrictive are:

- Public: Any user can view the document.
- Suppressed: Judges, court and Judicial Department staff, and parties to the case (including parties' attorneys) can view a suppressed document.
- Sealed: Only judges and court/Judicial Department staff can view a sealed document. No other party, including parties to the case, have access to a sealed document.

3. Click the upload button to upload a document. Double click the document from your folder list, or highlight it and press "Open."
   a. A green status bar flashes confirming your upload.
   b. The documents under *Event are now a link. Click the event link to review the document. Note: Each document must be uploaded separately.
4. Include any missed filings by clicking the arrow in the "Add Event" field. Highlight and select the new filing event, and click the "Add" button to add

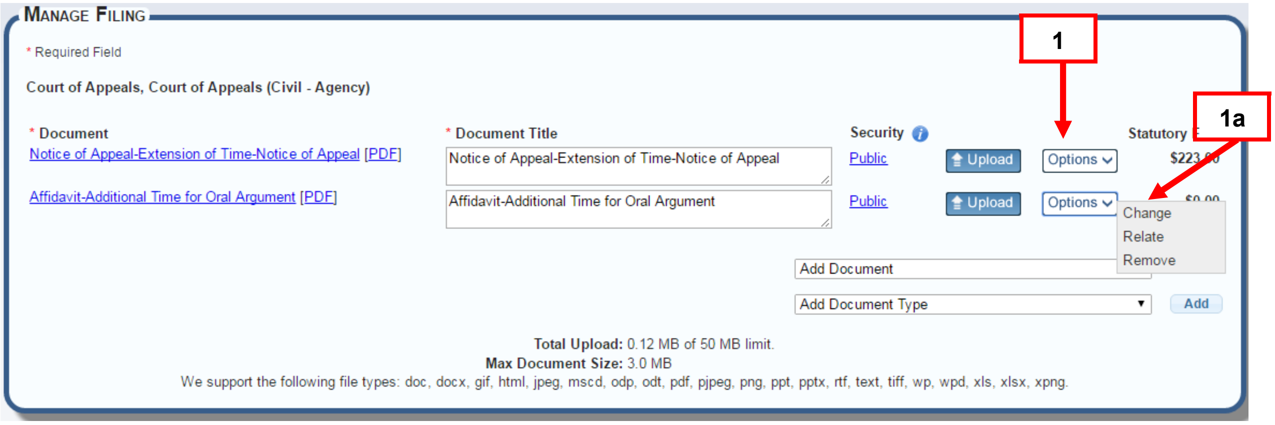
additional event.

- Repeat step 3 to upload.

5. Every screen on the File Builder features “Save and Close” and “Cancel Filing” options. “Save and Close” moves the item to “Drafts.” The “Cancel Filing” option closes the File Builder and does not save the filing.

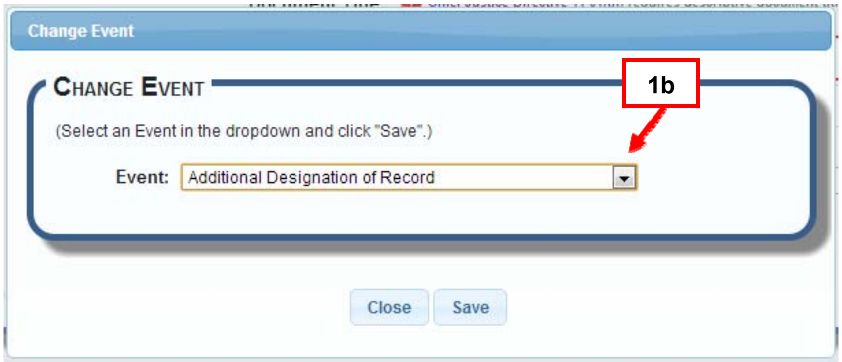
6. Press “Continue.”

MANAGE FILING – CHANGE EVENT, RELATE AND REMOVE DOCUMENTS



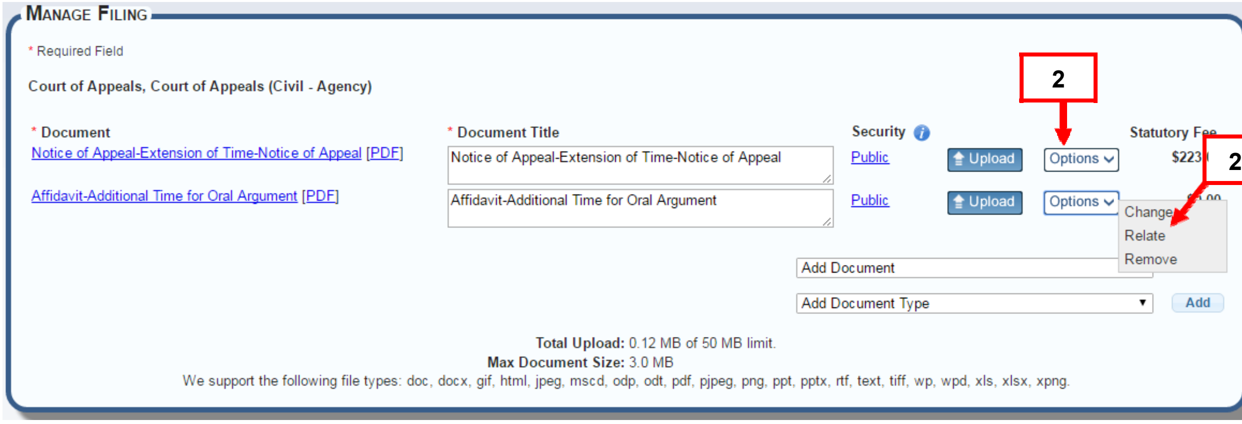
1. To change an event type entered incorrectly, click the options menu next to the Upload button.

   a. Choose **Change Event.**



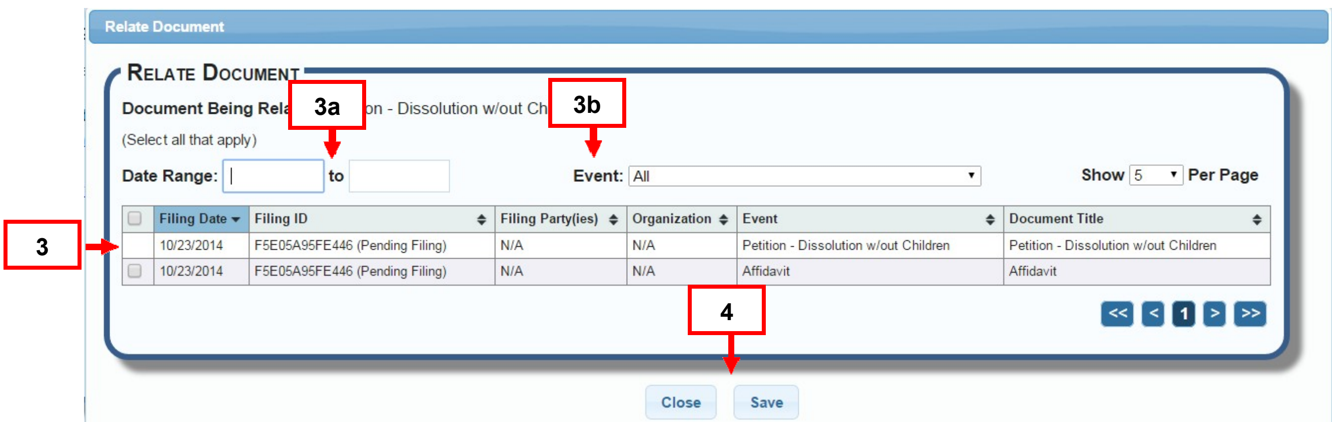
   b. From the pop up, select a new event from the dropdown and click “Save” to make the change or “Close” to cancel.

   WARNING: If a document was uploaded to match the original document selected, make sure the correct document matches the change that is made. If you need to re-upload a corrected document, select upload to overwrite the existing uploaded document.



2. Relate a document to an existing case filing, by clicking options menu next to the Upload button.

   a. Choose **Relate.**

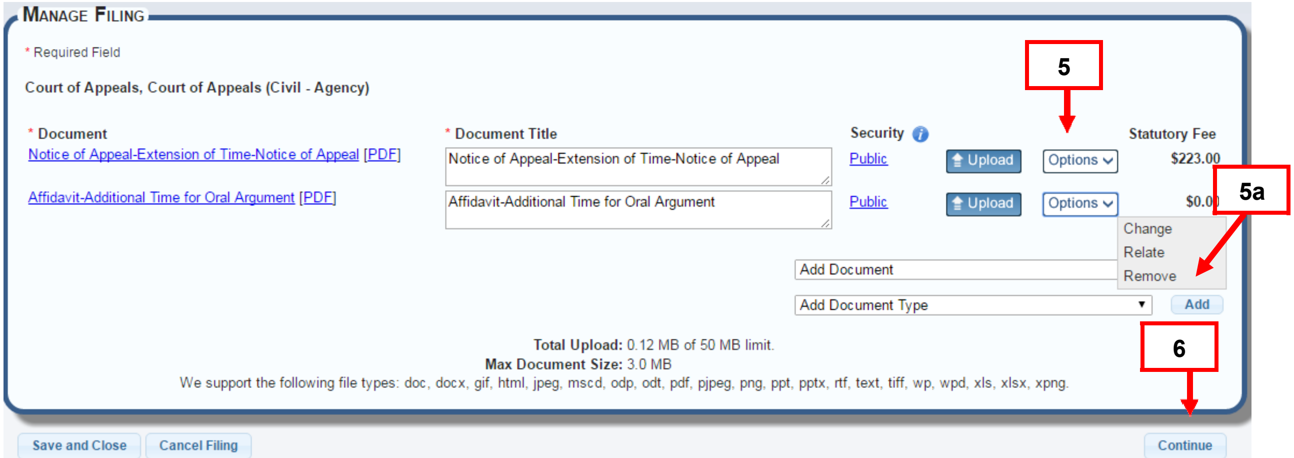


3. A Relate Document table displays listing all case filing events. Click the checkbox to relate an item.

   a. Filter the table from the filing date. Click in the date range boxes to select.

   b. Filter the table for case events. Click the arrow, highlight and select an event.

4. Click the “Save” button to save. The “Close” button cancels the screen without saving changes.



5. Remove any document from the Manage Filing screen (Does not include initiating documents for File New Case) by clicking the options menu next to the Upload button.

    a. Choose **Remove.** If a document is related to a main document, it will also be removed.

6. Once all documents have been uploaded, press **Continue**.

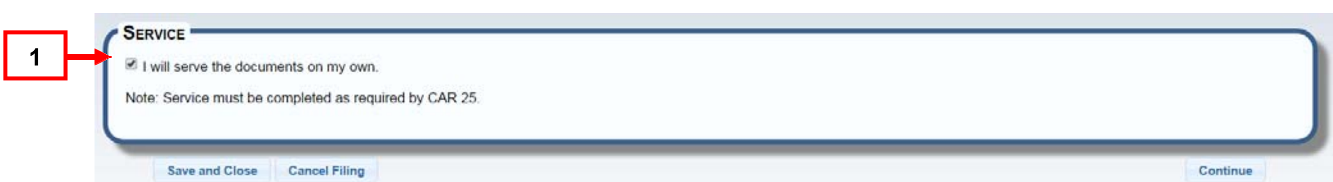
FILE NEW APPEALS COURT CASE – SERVICE

Service has three sections.

E-Service: Parties who have an e-filing account.

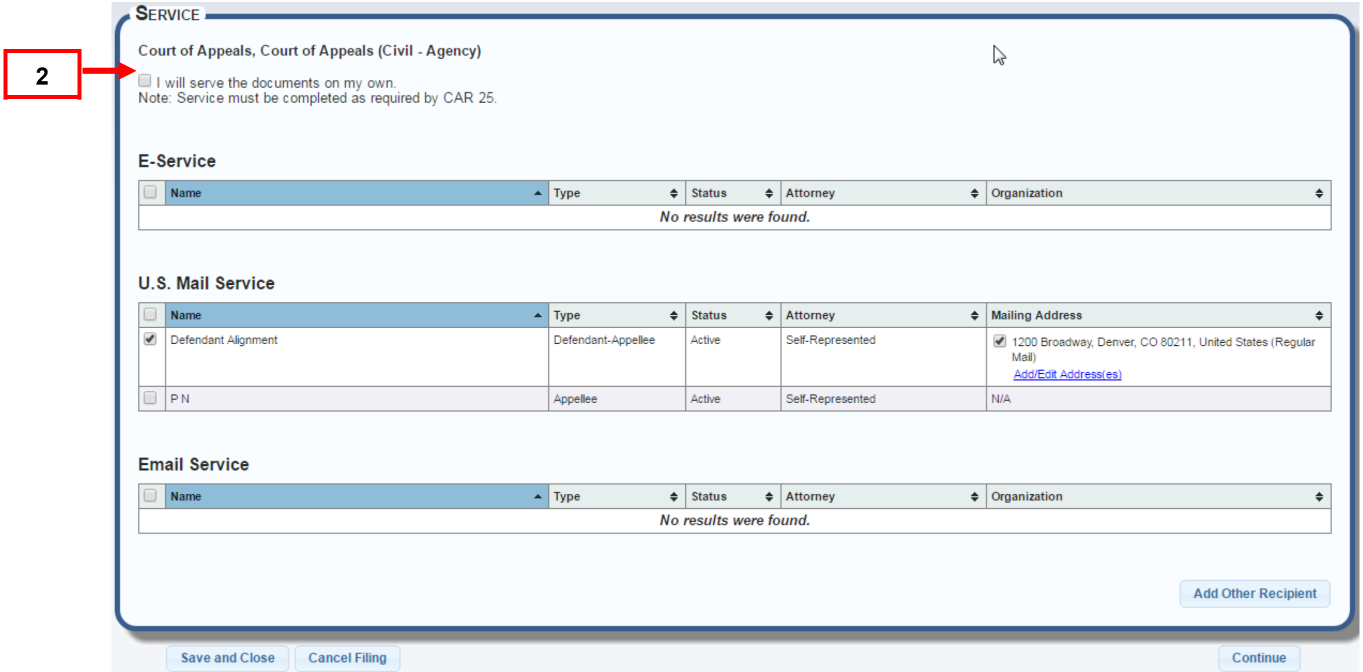
U.S. Mail: Party(ies) to the case that do not have an e-filing account.

Email Service: For the service of Appeals Clerks.

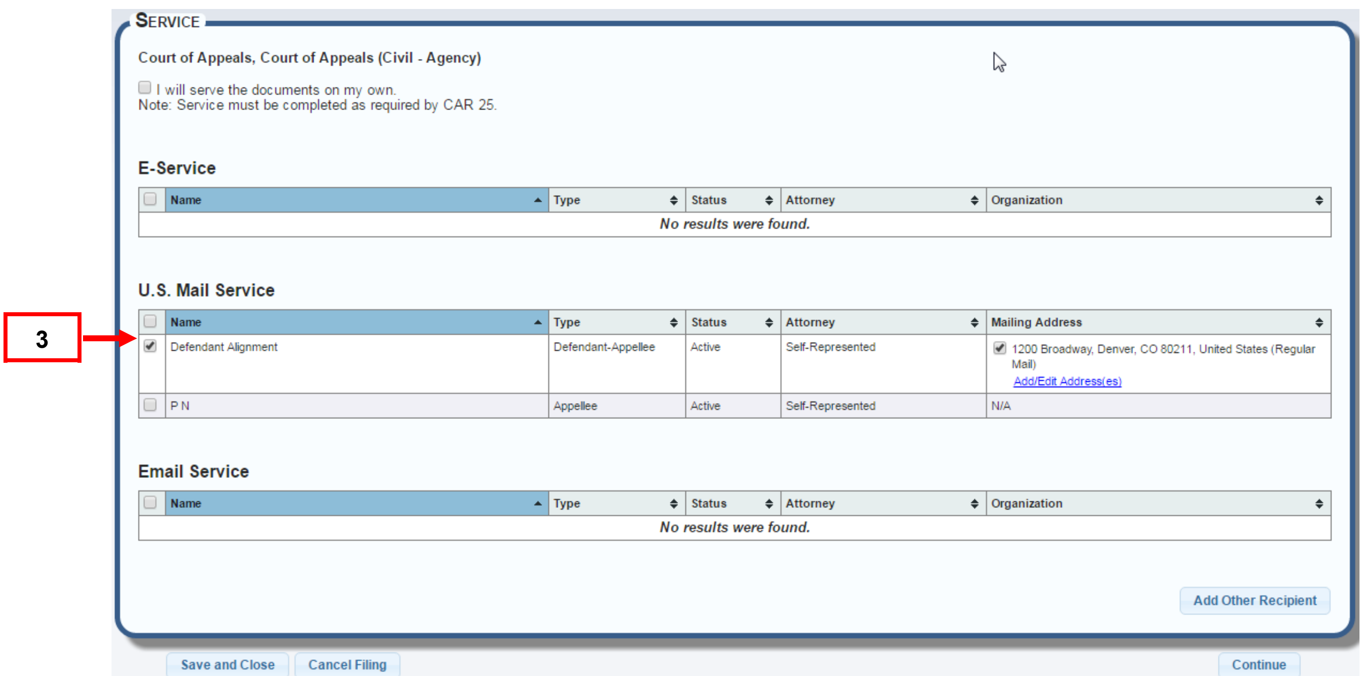


1. Sending copies of e-filed documents in a new case filing is a courtesy for a new case filing.
   (Note: Service must be completed as required by CAR 25)

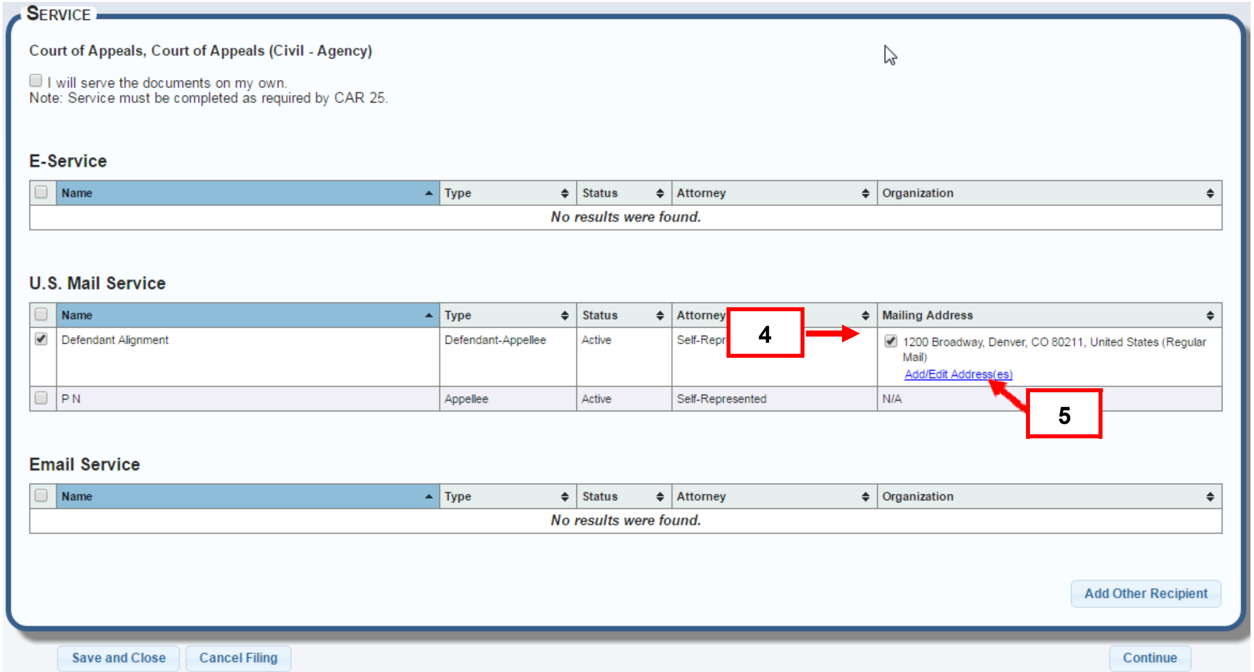
Leave the checkmark in the "I will serve the documents on my own and do not need the Colorado Courts E-Filing system to complete service." if you ***do not*** want courtesy copies sent through the e-filing system.



2. In order for the system to mail courtesy copies, uncheck the “I will serve the documents on my own and do not need the Colorado Courts E-Filing system to complete service”. The screen will expand to show the parties in the case.

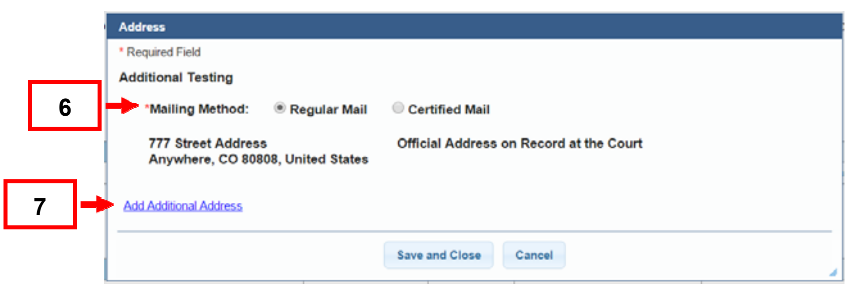


3. Check the parties you want to mail a courtesy copy to either individually or if all parties, select the checkbox at the top of the checkbox column. The default does not check any recipients. If the checkbox remains unchecked, the system will not mail courtesy copies.



4. If an address was added while adding the party, the address will auto-check. This address cannot be edited unless you go back to the party screen and select edit, however you can change the mailing method to “Certified Mail”.

5. To change regular mailing to certified mailing, select the “Add/Edit Address(es)” link to the right of the party name.

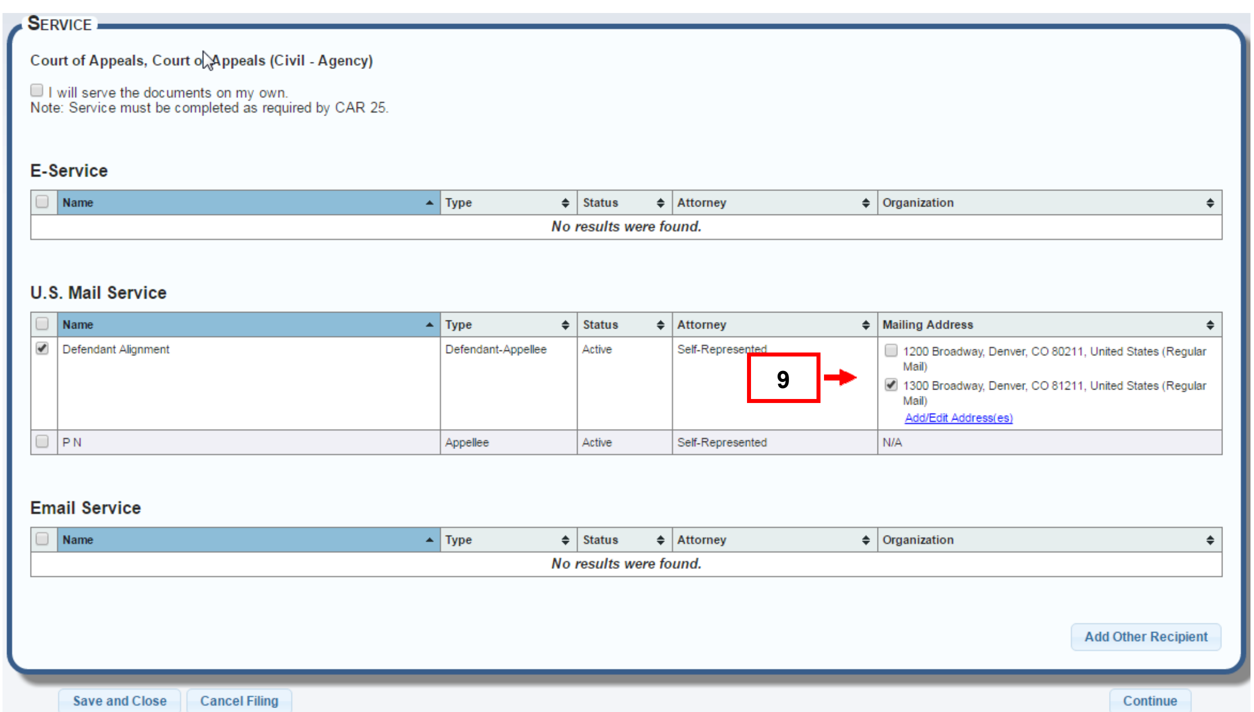


6. A pop up will appear “Regular Mail” is auto-selected. Change by selecting radio button for Certified Mailing and press “Save and Close”.

7. If adding an additional address, select the “Add Additional Address” link.

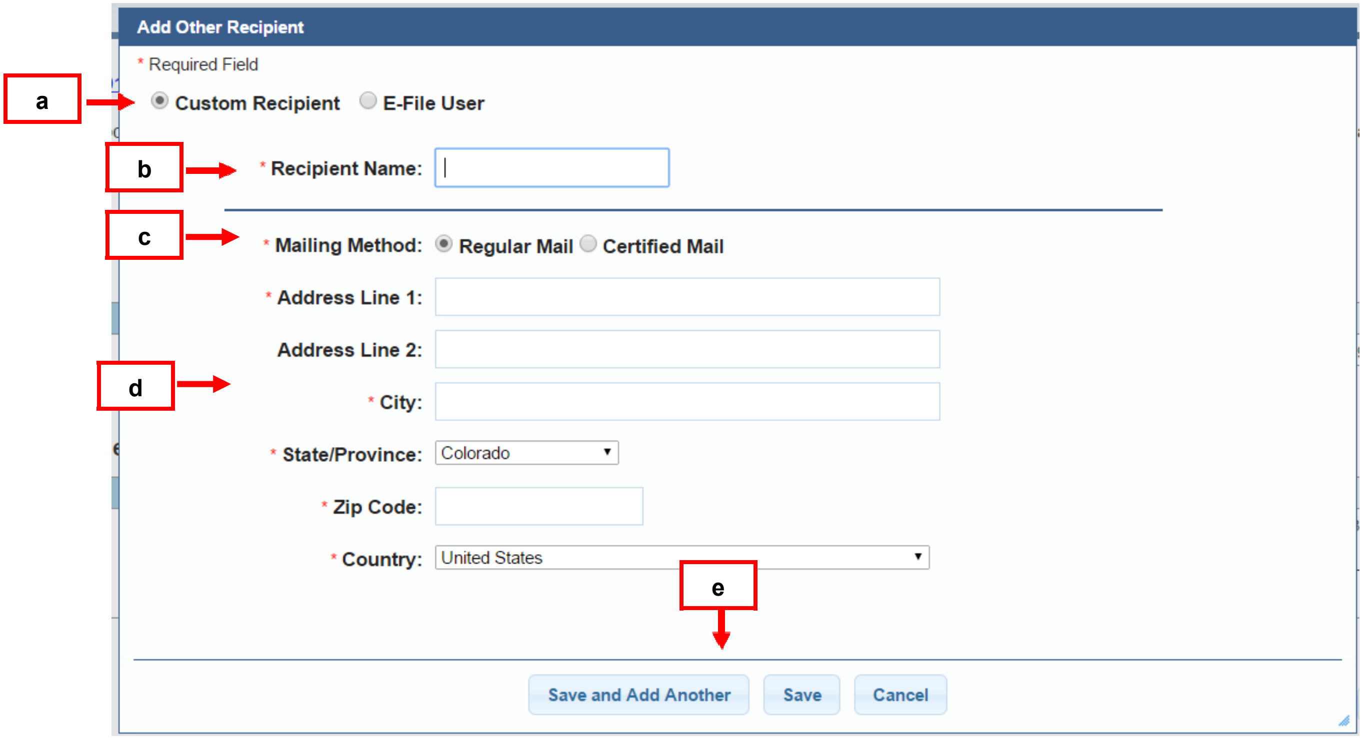
8. Fill out all required fields:
    a. To add more than one, select “Add Address” button. This will also allow you to edit address just added.

    b. OR Press “Save and Close” to add address and go back to the service screen.



9. The last address added will auto-check. If multiple addresses needed for mailing, check any additional addresses listed.

To include an Additional Recipient, click the “Add Other Recipient” button in the service screen. Add Other Recipient means an e-filer can ask the system to either mail or e-serve filings to another person whose name does not display on the Service screen.



For a custom recipient:

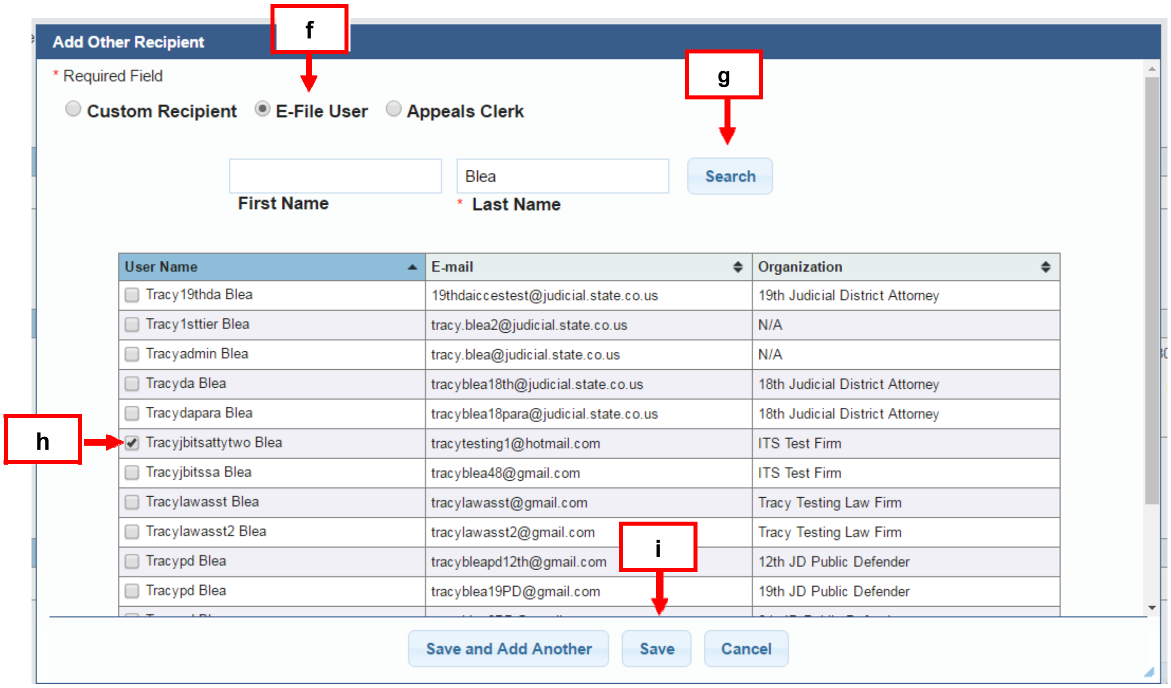
a. Click the “Custom Recipient” radio button.

b. Enter the recipient name.

c. Select “Mailing Method” of either “Certified Mail” or “US Mail.”

d. Enter the mailing address.

e. To save the information press “Save”, to exit and cancel click “Cancel”. To continue adding additional recipients, click “Save and Add Another”.



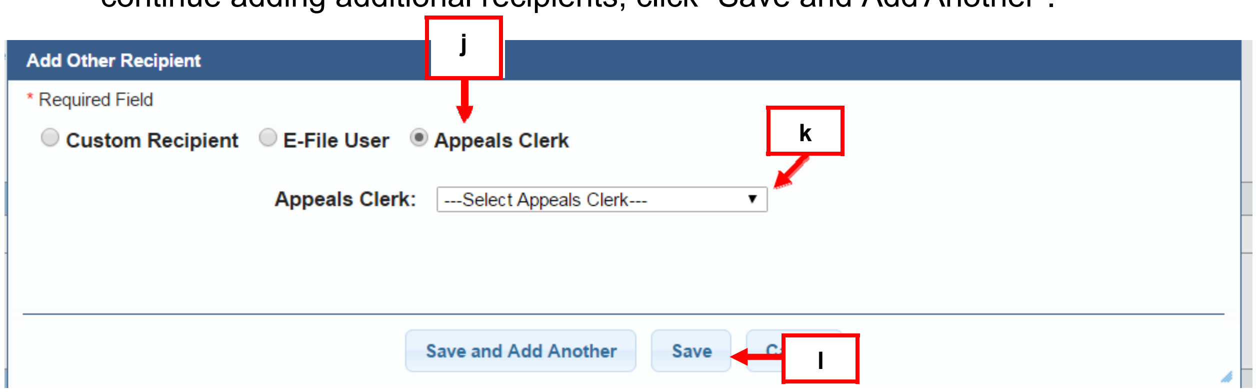
For an e-file user:

f. If e-service is needed, click the “E-File User” radio button.

g. Enter the user’s last name and press “Search.”

h. Select the user name from the search result list.

i. To save the information press “Save”, to exit and cancel click “Cancel”. To continue adding additional recipients, click “Save and Add Another”.



For an appeals clerk:

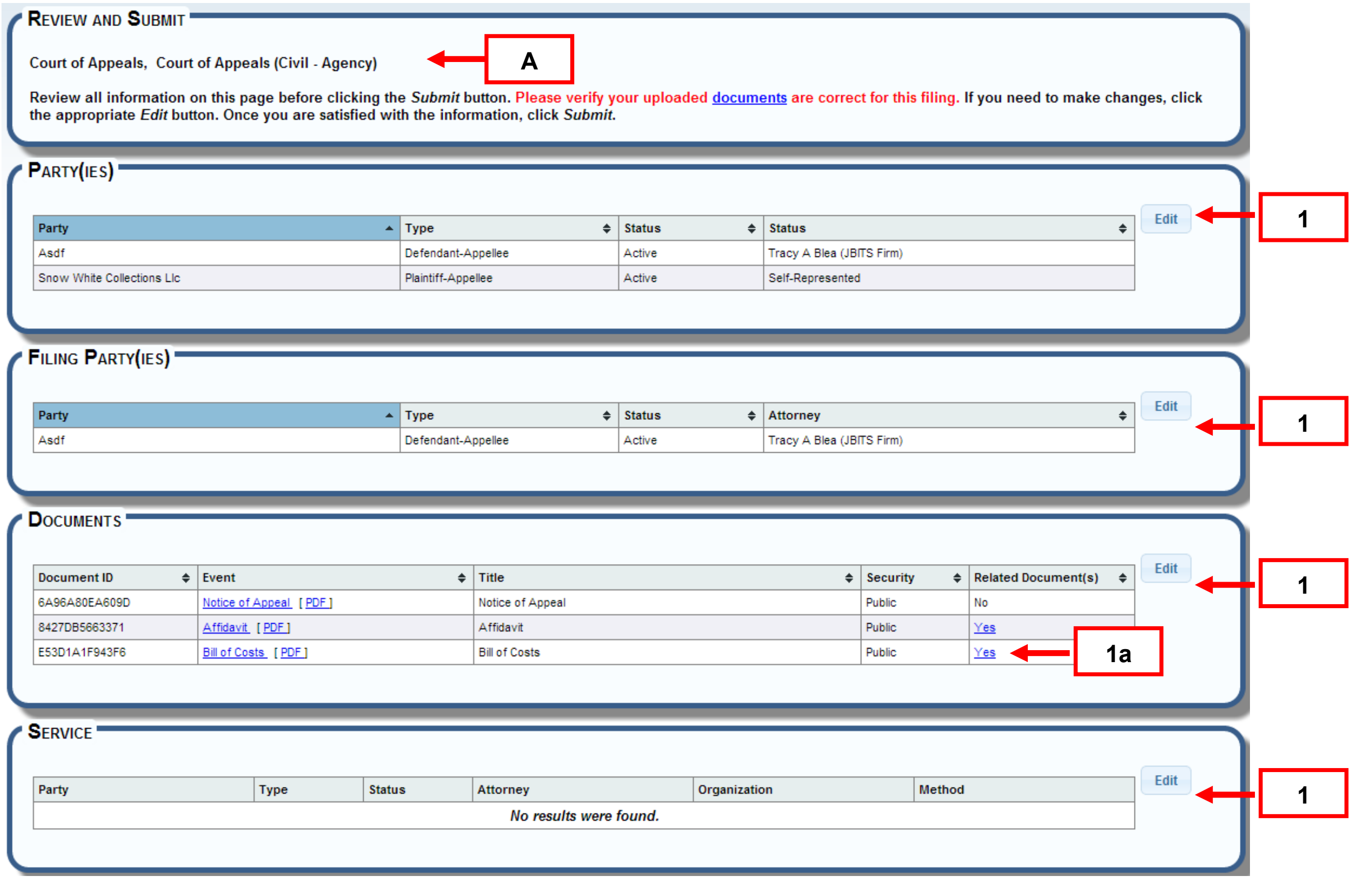
j. For service of a document to a designated appeals clerk, select “Appeals Clerk” radio button.

k. Select the Appeals clerk for the dropdown menu.

l. To save the information press “Save”, to exit and cancel click “Cancel”. To continue adding additional recipients, click “Save and Add Another”.

REVIEW AND SUBMIT

Review and Submit screen is a summary of the new case filing.

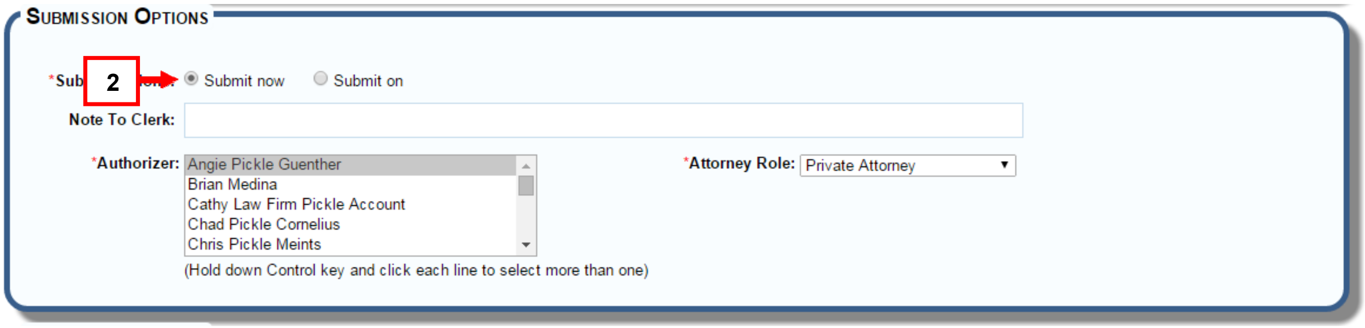


A. The case class and case type display.

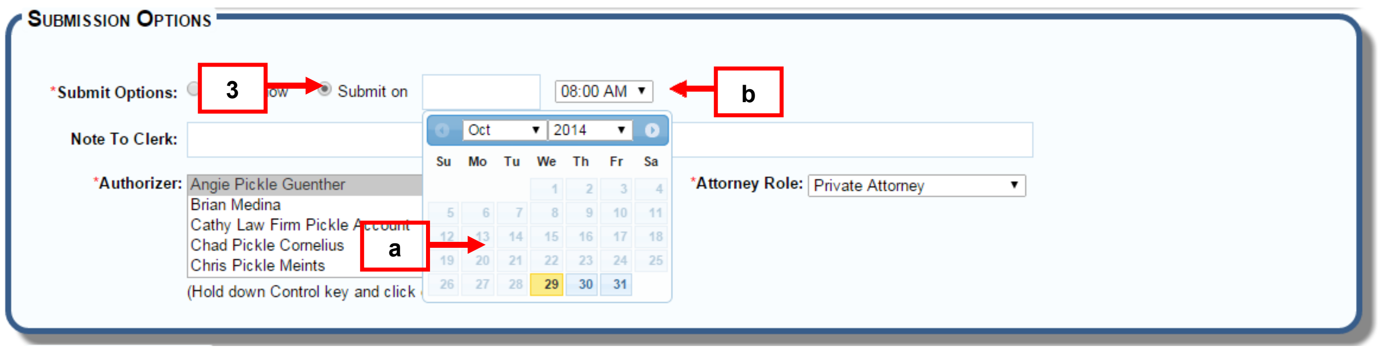
1. Review the Filing Party(ies), Documents, and Courtesy Copies sections. Click the “Edit” button on the right of each section to change or update information.

a. If the “Relate” option was selected in the manage filing screen, the column “Related Document(s)” will have a “Yes” link to allow the user to confirm the related document(s).

1



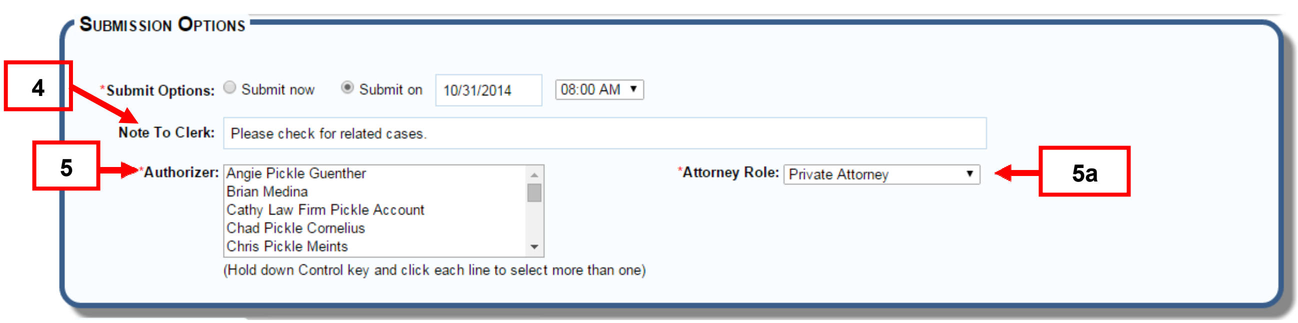
2. Leave “Submit now” selected to send the filing immediately.



3. To delay a filing to the court or to delay a “serve only” submission, postpone submitting by clicking the “Submit On” button.

   a. Select a future date from the pop up date box.

   b. Enter the time of day. The filing will be saved in Scheduled Filings.



4. Enter any *helpful* notes the court may need to process the filing.

5. Select the “Authorizer(s)” from your organization.

a. Choose “Attorney Role.”

6. If the filing is exempt from fees per Chief Justice Directive 06-01 or 98-01, select the appropriate box.

7. Enter any “Billing Comments” i.e. an organization billing reference.

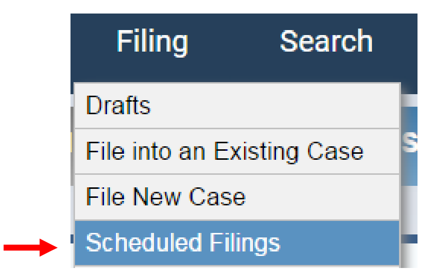
8. Click “Submit” to complete your filing.

9. “Save and Close” saves the filing in “Drafts” so it can be finished later. Click “Drafts” on the “Filing” screen to resume the filing. Click “Cancel Filing” to exit the filing completely.

SCHEDULED FILINGS

Scheduled Filings displays a table of delayed filing items, and is populated from choosing “Submit on” in the Submission Options section of the Review and Submit screen for either File into Existing Case or File New Case.

SCHEDULED FILINGS - HOW TO FIND

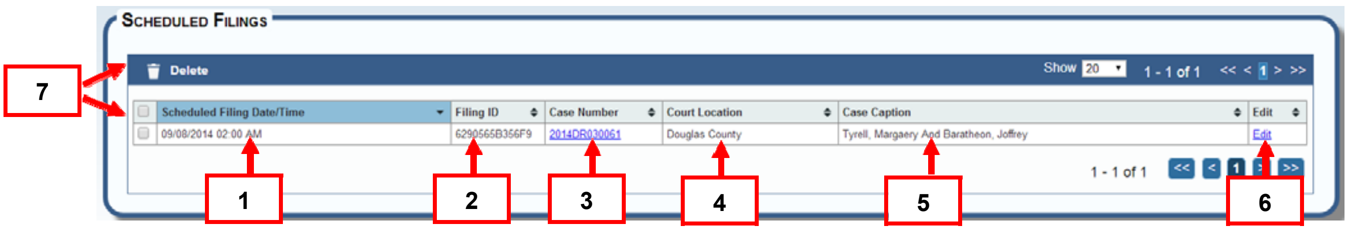


Hover over the “Filing” tab and select “Scheduled Filings.”

SCHEDULED FILINGS – TOOLBAR

1. Show: View 20, 50 or 100 scheduled filings per page. Click the arrow and select a viewing preference.

SCHEDULED FILINGS - TABLE



1. **Scheduled Filing Date and Time**: This column displays the date an e-filed item is scheduled to be filed with the court or served.

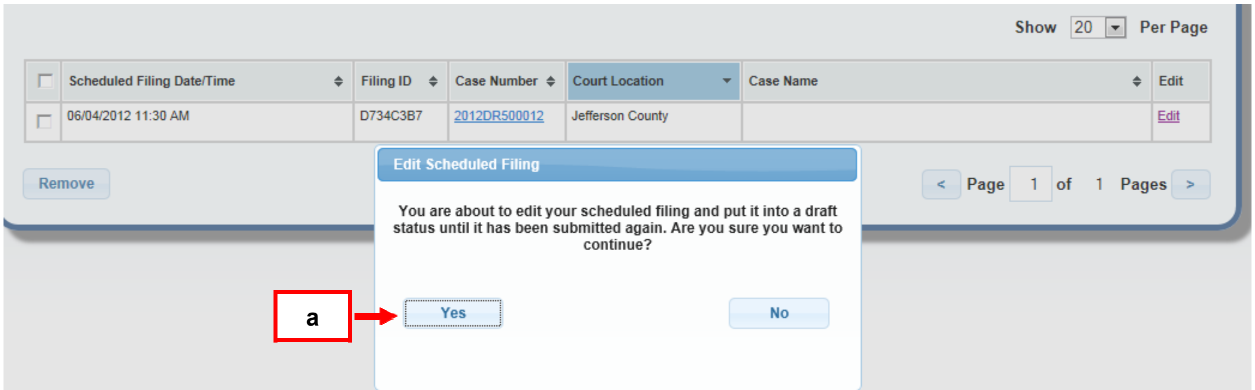
2. **Filing ID**: Is a unique number that identifies a single e-filing transaction consisting of one or more e-filed documents. Click the hyperlink to view Filing ID details.

3. **Case Number:** Each case is assigned a case number as it relates to a selected court location. Case numbers for accepted cases display as hyperlinks. View case history by clicking on the case number hyperlink.

4. **Court Location:** The location column identifies where a case or document will be e-filed.

5. **Case Caption:** This column displays the case caption as accepted by the court. If the filing is new, no case caption will display.

6. **Edit:** Click the “Edit” link on any line item to edit a scheduled filing. When “Edit” is clicked, a pop-up message displays.



a. Clicking the "Yes" button displays the "Review and Submit" screen and removes the filing from scheduled filing status.

- Any item on "Review and Submit" can always be edited. The option to "Submit now" or change the "Submit on" date is also available.

7. **Remove**: To remove one or more line items in the table, check the box next to the scheduled date and then click the "Delete" button to permanently remove the item(s) from the system.

MANAGE BATCH FILINGS

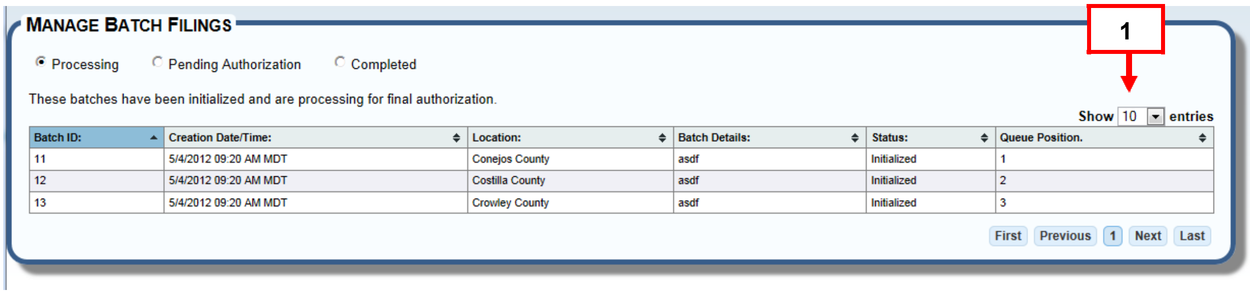
In order to Batch File, a user or an organization must contact E-Filing support at efilingsupport@judicial.state.co.us to be added as a batch filer.

Displays "Pending," "Processing" and "Completed" tables of batch filing items, and is **available only for authorized organizations**.

MANAGE BATCH FILINGS - HOW TO FIND

Hover over the "Filing" tab to choose the "Manage Batch Filing" menu option

MANAGE BATCH FILINGS – FILTER



MANAGE BATCH FILINGS

Processing Pending Authorization Completed

These batches have been initialized and are processing for final authorization.

Show 10 entries

Batch ID:	Creation Date/Time:	Location:	Batch Details:	Status:	Queue Position.
11	5/4/2012 09:20 AM MDT	Conejos County	asdf	Initialized	1
12	5/4/2012 09:20 AM MDT	Costilla County	asdf	Initialized	2
13	5/4/2012 09:20 AM MDT	Crowley County	asdf	Initialized	3

First Previous 1 Next Last

1. **Show**: View 10, 25 or 50 scheduled filings per page. Click the arrow and select a viewing preference

MANAGE BATCH FILINGS – PROCESSING

MANAGE BATCH FILINGS

Processing Pending Authorization Completed Errors

These batches have been initialized and are processing for final authorization.

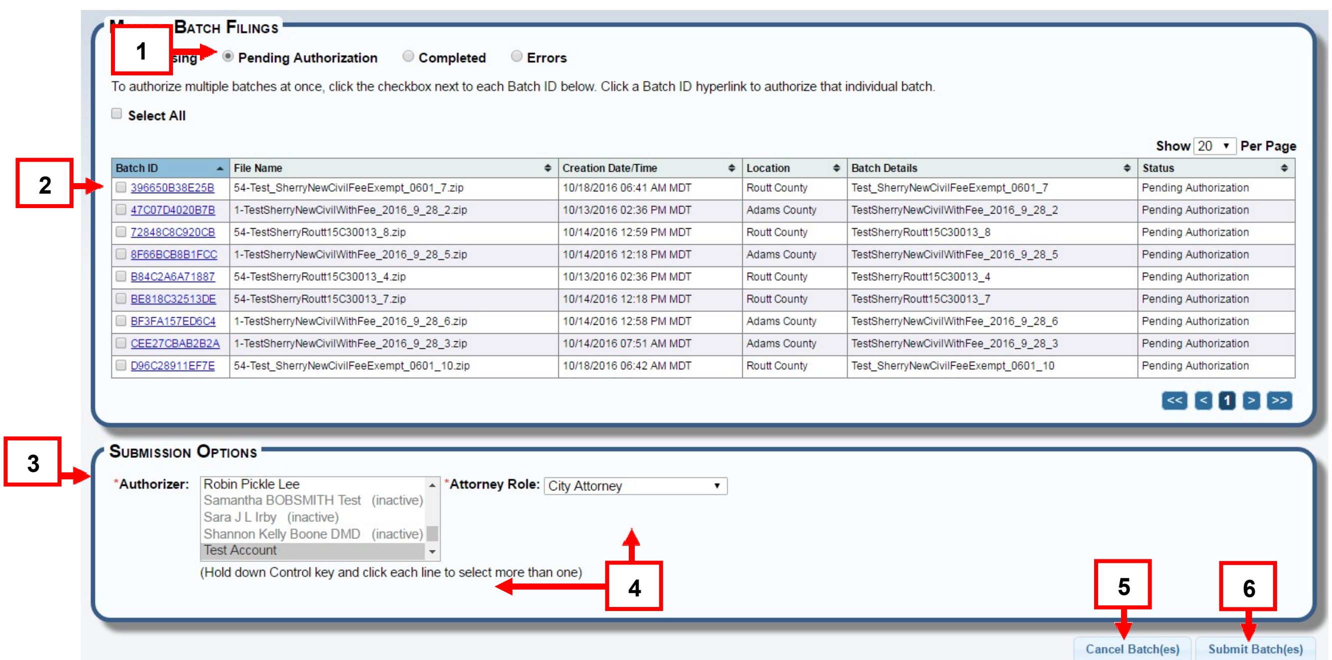
Show 20 entries

Batch ID:	File Name:	Creation Date/Time:	Location:	Batch Details:	Status:	Queue Position.
11	FILENAME 11	10/17/2012 15:47 PM MDT	Conejos County	asdf	Validating	1
12	FILENAME 12	10/17/2012 15:47 PM MDT	Costilla County	asdf	Validating	2
13	FILENAME 13	10/17/2012 15:47 PM MDT	Crowley County	asdf	Validating	3

<< < 1 > >>

1. **Processing**: Displays batches that are initialized and are processing for final authorization. Each batch has a queue position. Once a batch is finished processing, it disappears from this screen and loads into the "Pending Authorization" screen.

MANAGE BATCH FILINGS – PENDING AUTHORIZATION



M... BATCH FILINGS

...sing Pending Authorization Completed Errors

To authorize multiple batches at once, click the checkbox next to each Batch ID below. Click a Batch ID hyperlink to authorize that individual batch.

Select All

Show 20 Per Page

Batch ID	File Name	Creation Date/Time	Location	Batch Details	Status
396650B38E25B	54-Test_SherryNewCivilFeeExempt_0601_7.zip	10/18/2016 06:41 AM MDT	Routt County	Test_SherryNewCivilFeeExempt_0601_7	Pending Authorization
47C07D4020B7B	1-TestSherryNewCivilWithFee_2016_9_28_2.zip	10/13/2016 02:36 PM MDT	Adams County	TestSherryNewCivilWithFee_2016_9_28_2	Pending Authorization
72848C8C920CB	54-TestSherryRoutt15C30013_8.zip	10/14/2016 12:59 PM MDT	Routt County	TestSherryRoutt15C30013_8	Pending Authorization
8F66BCB8B1FCC	1-TestSherryNewCivilWithFee_2016_9_28_5.zip	10/14/2016 12:18 PM MDT	Adams County	TestSherryNewCivilWithFee_2016_9_28_5	Pending Authorization
B84C2A6A71887	54-TestSherryRoutt15C30013_4.zip	10/13/2016 02:36 PM MDT	Routt County	TestSherryRoutt15C30013_4	Pending Authorization
BE818C32513DE	54-TestSherryRoutt15C30013_7.zip	10/14/2016 12:18 PM MDT	Routt County	TestSherryRoutt15C30013_7	Pending Authorization
BF3FA157ED6C4	1-TestSherryNewCivilWithFee_2016_9_28_6.zip	10/14/2016 12:58 PM MDT	Adams County	TestSherryNewCivilWithFee_2016_9_28_6	Pending Authorization
CEE27CBAB2B2A	1-TestSherryNewCivilWithFee_2016_9_28_3.zip	10/14/2016 07:51 AM MDT	Adams County	TestSherryNewCivilWithFee_2016_9_28_3	Pending Authorization
D96C28911EF7E	54-Test_SherryNewCivilFeeExempt_0601_10.zip	10/18/2016 06:42 AM MDT	Routt County	Test_SherryNewCivilFeeExempt_0601_10	Pending Authorization

<< < 1 > >>

SUBMISSION OPTIONS

*Authorizer: Robin Pickle Lee
Samantha BOBSMITH Test (inactive)
Sara J L Irby (inactive)
Shannon Kelly Boone DMD (inactive)
Test Account

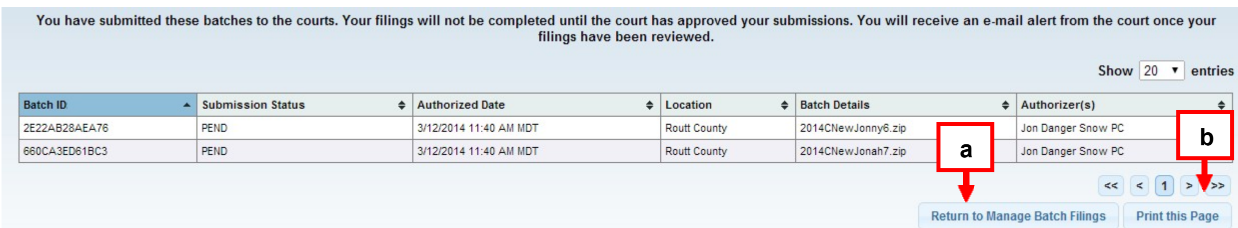
*Attorney Role: City Attorney

(Hold down Control key and click each line to select more than one)

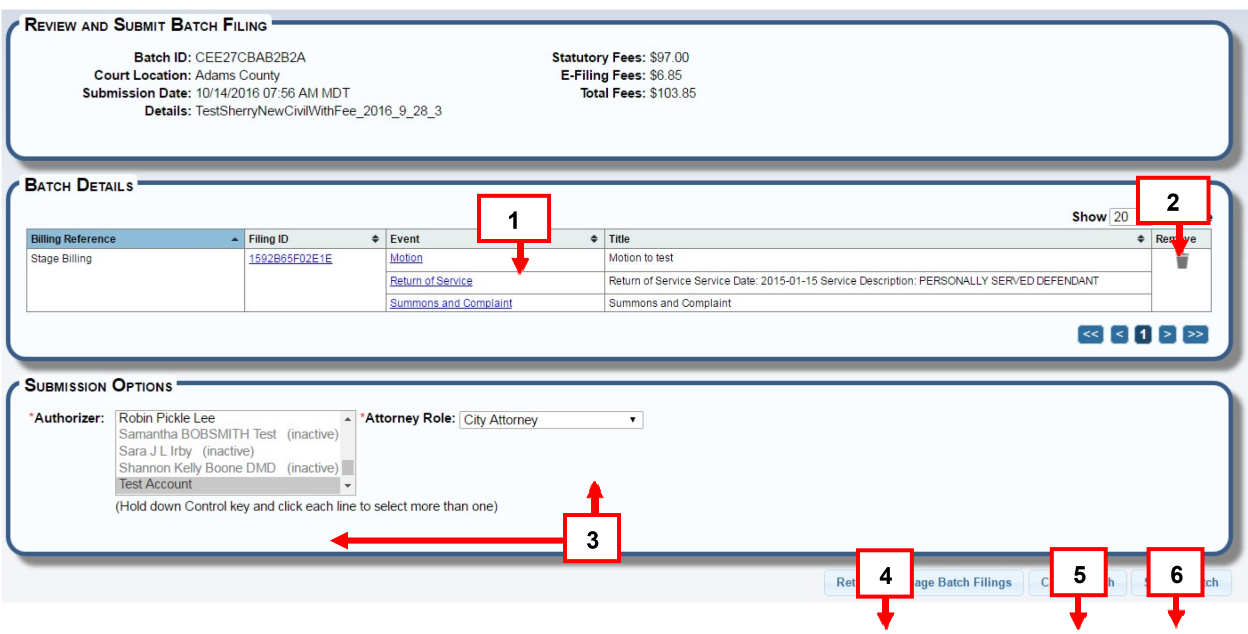
Cancel Batch(es) Submit Batch(es)

1. **Pending Authorization**: This is a table of batches initialized from the “Processing” screen. Items in this table are pending authorization.
2. To authorize a single/multiple batch(es), click the appropriate checkbox(es).
3. The “Submission Options” section is inactive until a batch item is selected.
4. Choose “Authorizer(s)” from the authorizer list and “Attorney Role.” These are required fields.
5. Remove a batch by clicking in the checkbox next to the Batch ID and then click the “Cancel Batch(es)” button.
6. If one or multiple batches are requested, click the “Submit Batches” button to submit and display a receipt page.

MANAGE BATCH FILINGS – COMPLETE – RECEIPT (MULTIPLE BATCHES)



a. Click “Return to Manage Batch Filings” to return and review or submit additional batches.
b. Click “Print this page” to print a receipt.



MANAGE BATCH FILINGS – REVIEW AND SUBMIT (SINGLE BATCHES)

This page displays when a user authorizes a single batch in the pending authorization queue.

1. Batch documents can be viewed. Click on the event hyperlink.

2. A filing can also be removed. Click on the trash can icon.

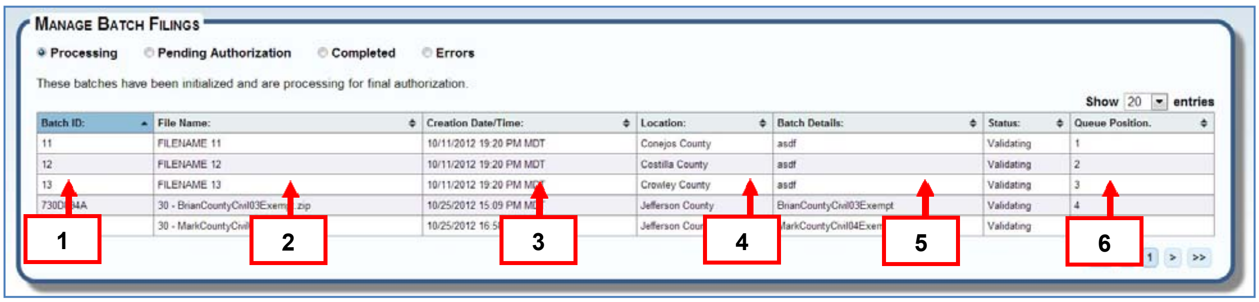
3. Choose "Authorizer(s)" from the authorizer list and "Attorney Role." These are required fields.

4. Click the "Return to Manage Batch Filings" button if needed.

5. Click "Cancel Batch" to cancel the action.

6. Click the "Submit Batch" button.

MANAGE BATCH FILINGS - TABLE COLUMN



1. **Batch ID:** The unique ID assigned to a batch filing.

2. **Submission Date and Time**: The date a batch was submitted for processing.

3. **Location:** The Location column identifies where a case or document was e-filed.

4. **Batch Details:** The descriptor of a batch filing, which is entered by the filing firm.

5. **Status:** This column displays the status of the batch filing.
   - o Initialized,
   - o Pending authorization
   - o Complete, documents pending
   - o Complete, all documents reviewed

6. **Queue Position:** The location of the filing item in the batch filing queue. Each batch has a queue position.

SEARCH

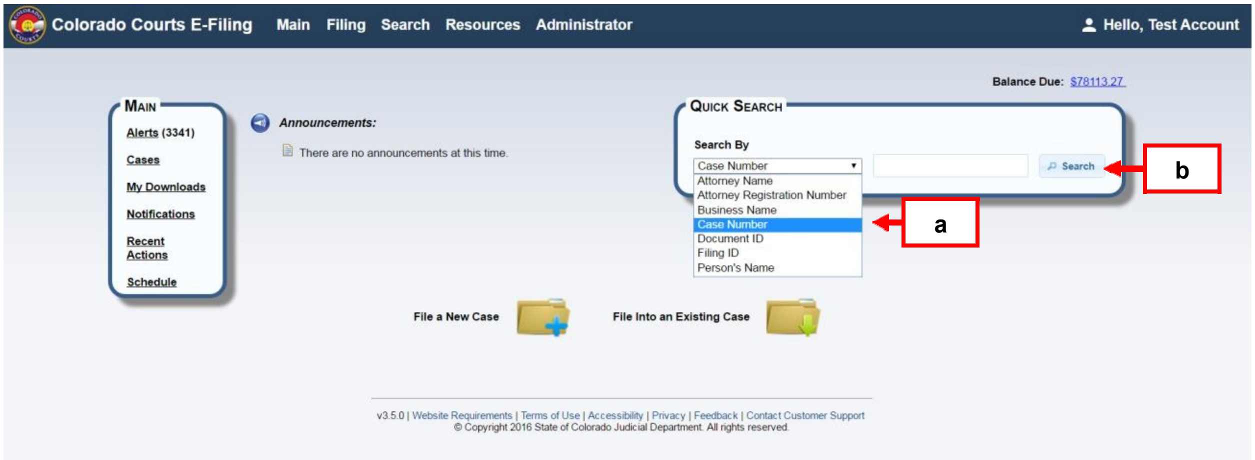
QUICK SEARCH

The Quick Search feature provides fast searches from either the Home or Search screens by Business Name, Case Number, Document ID, Filing ID or Person's Name.

Note: Quick Search Probate and Suppressed case types using a case number only. Accessing the Case History/Register of Actions for Probate cases is available only to attorneys and organizations attached to the case.

QUICK SEARCH - HOW TO FIND

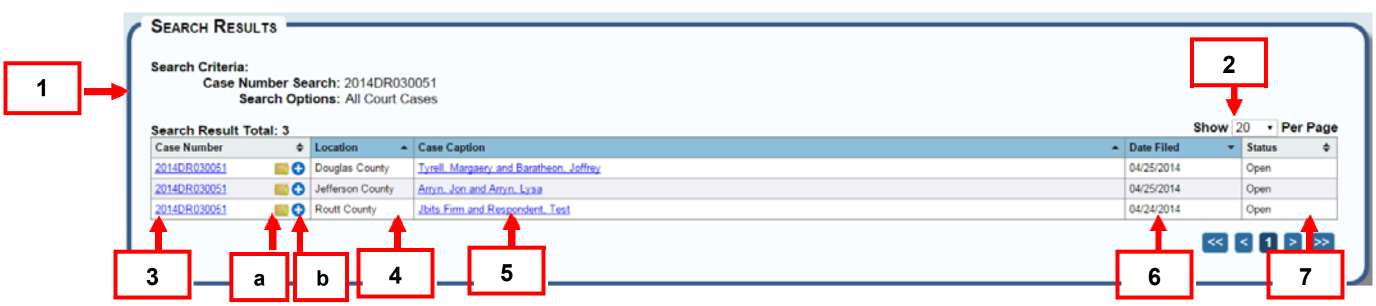
Access “Quick Search” by clicking the “Home”.



a. Click the arrow to view and select search choices.

b. Complete the appropriate fields and press the “Search” button.

QUICK SEARCH RESULTS – SEARCH CRITERIA DISPLAY, FILTER AND TABLE COLUMNS



1. **Search Criteria Display**: Outlines the details of the search request.

2. **Show**: View 20, 50 or 100 scheduled filings per page. Click the arrow and select a viewing preference.

3. **Case Number**: A hyperlinked number assigned to the case as it relates to the court location. View case history by clicking on the case number hyperlink.

a. **File Folder icon**: Click to file into the existing case

b. **Monitor icon:** Click to move case to monitored cases list.

4. **Location**: Displays court location of the case.

5. **Case Caption:** This displays the caption as accepted or created by the court. Click the hyperlinked case caption to view case information.

6. **Date Filed**: Shows the filing date for the case.

7. **Status:** Lists all case statuses.

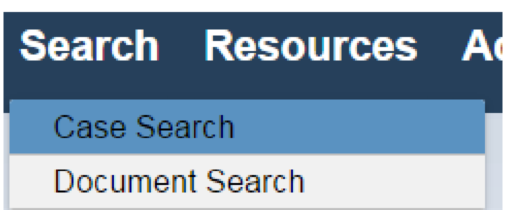
Case Search

Case Search allows you to search for Trial and Appellate Court cases that were filed in the State of Colorado. You may search by Court Location, Case Class, Type, Status, and Year. The Party Search allows you to search by Attorney or Judicial Officer, Person or Business Name. Case Search will bring back up to 2,000 case results that match the search criteria that you entered.

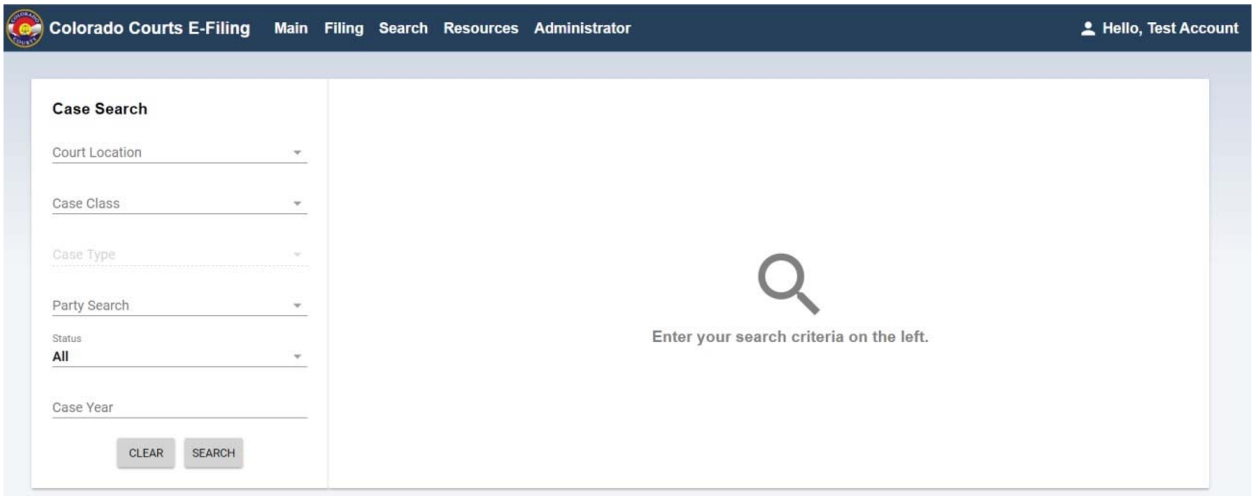
Please note that Case Search will filter out cases that you or your organizations do not have access too. These are cases that are Sealed, Suppressed or Limited Access cases.

CASE SEARCH – HOW TO FIND

Click the "Search" tab to choose the "Case Search" menu option.



Case Search – Search Fields



1. ***Court Location:** Select the Court Location(s) that you are looking for cases in. You may select an individual court location or “All Trial Courts” or “All Appellate Courts”.

2. **Case Class:** Select “All” or click the appropriate case class.

3. **Case Type:** If you select a case class, the case type drop down will activate. This drop down will fill with case types that apply to the case class you have selected.

4. **Name:** You can search for cases by the following name types:

a. **Attorney Name:** This ~~search~~ will allow you to search for cases where the attorney is actively representing a party on the case. Start by typing the attorney’s last name. A drop down will populate with all attorney last names that match the characters you’re typing into the text field. Once you have added their last name, you can insert a comma and type their first name. Once you see the attorney’s name you want to search for, select their name from the drop down.

b. **Judicial Officer Name:** This ~~search~~ will allow you to search for cases where a specific the Judicial Officer hearing the case. Start by typing the Judicial Officer’s last name. A drop down will populate with all Judicial Officer last names that match the characters you’re typing into the text field. Once you have added their last name, you can insert a comma and type their first name. Once you see the Judicial Officer’s name you want to search for, select their name from the drop down.

c. **Person Name:** This allows you to search for specific persons cases. This search is a wildcard search.

- If Smi* is entered, the system will search for cases where the party’s name starts with SMI.
- If *ith is entered, the system will search for cases where the party’s name ends with ITH.

- If * ith * is entered, the system will search for cases where the party's name contains ITH.

d. **Business Name:** This allows you to search for a specific business cases. This search is a wild card search.

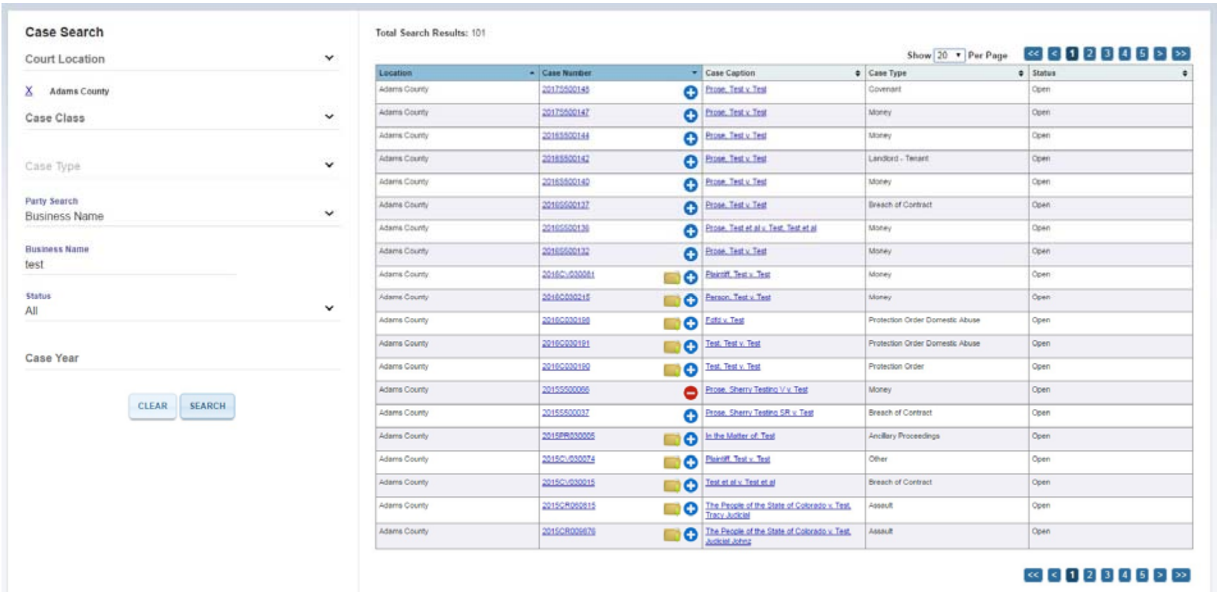
- If Smi* is entered, the system will search for cases where the party's name starts with SMI.
- If *ith is entered, the system will search for cases where the party's name ends with ITH.
- If * ith * is entered, the system will search for cases where the party's name contains ITH.

5. **Case Status:** You can narrow your search by searching by case status. Case status includes: All, Open or Closed cases.

6. **Case Year:** You can narrow your search by searching for cases that were filed in a specific year.

Once you have added your search criteria, click the **Search** button. If you would like to clear the search criteria from the field, you can click the **Clear** button.

CASE SEARCH - RESULTS



1. **Show:** View 20, 50 or 100 results per page. Click the arrow and select a viewing preference.

2. **Location:** Displays court location of the case.

3. **Case Number**: A hyperlinked number assigned to the case as it relates to the court location. View case history by clicking on the case number hyperlink.

   a. File Folder icon: Click to file into the existing case. 

   b. Monitor icon: Click to move case to your monitored cases list. 

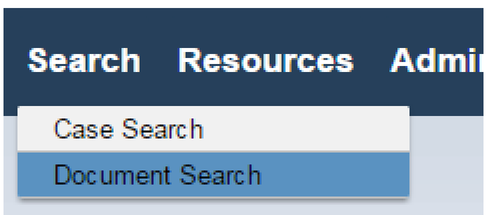
4. **Case Caption:** This displays the caption as accepted or created by the court. Click the hyperlinked case caption to view case information.

5. **Case Type:** This displays the case type as it relates to a case class. Ex., a breach of contract is a type of case in the civil case class.

6. **Status:** Provides choices for viewing a case that is open, closed, or all.

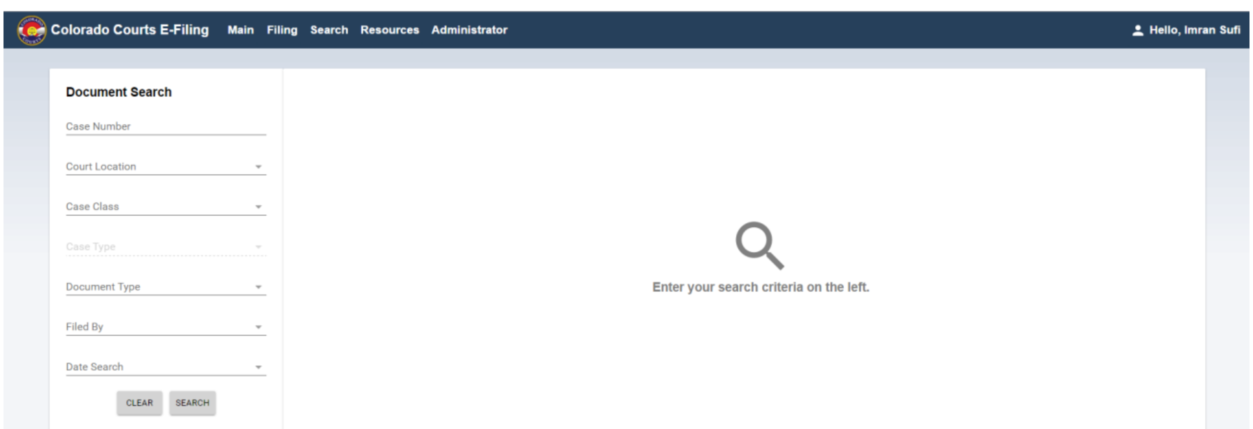
Document Search

DOCUMENT SEARCH – HOW TO FIND



Click on the "Search" tab to choose the "Document Search" menu option.

DOCUMENT SEARCH – SEARCH FIELDS



1. **Case Number:** You can search for documents for a specific case number.

2. *__Court Location:__ Select the Court Location(s) that you are looking for cases in. You may select an individual court location or "All Trial Courts" or "All Appellate Courts".

3. **Case Class:** Select “All Classes” or click the appropriate case class.

4. **Case Type:** If you select a case class, the case type drop down will activate. This drop down will fill with case types that apply to the case class you have selected.

5. **Document Type:** Select a specific court event

6. **Filed By:** You can search for cases by the following name types:

a. **Attorney Name:** This will allow you to search for cases where the attorney is actively representing a party on the case. Start by typing the attorney’s last name. A drop down will populate with all attorney last names that match the characters you’re typing into the text field. Once you have added their last name, you can insert a comma and type their first name. Once you see the attorney’s name you want to search for, select their name from the drop down.

b. **Judicial Officer Name:** This will allow you to search for cases where a specific the Judicial Officer hearing the case. Start by typing the Judicial Officer’s last name. A drop down will populate with all Judicial Officer last names that match the characters you’re typing into the text field. Once you have added their last name, you can insert a comma and type their first name. Once you see the Judicial Officer’s name you want to search for, select their name from the drop down.

c. **Person’s Name:** This allows you to search for specific persons cases. This search is a wildcard search.

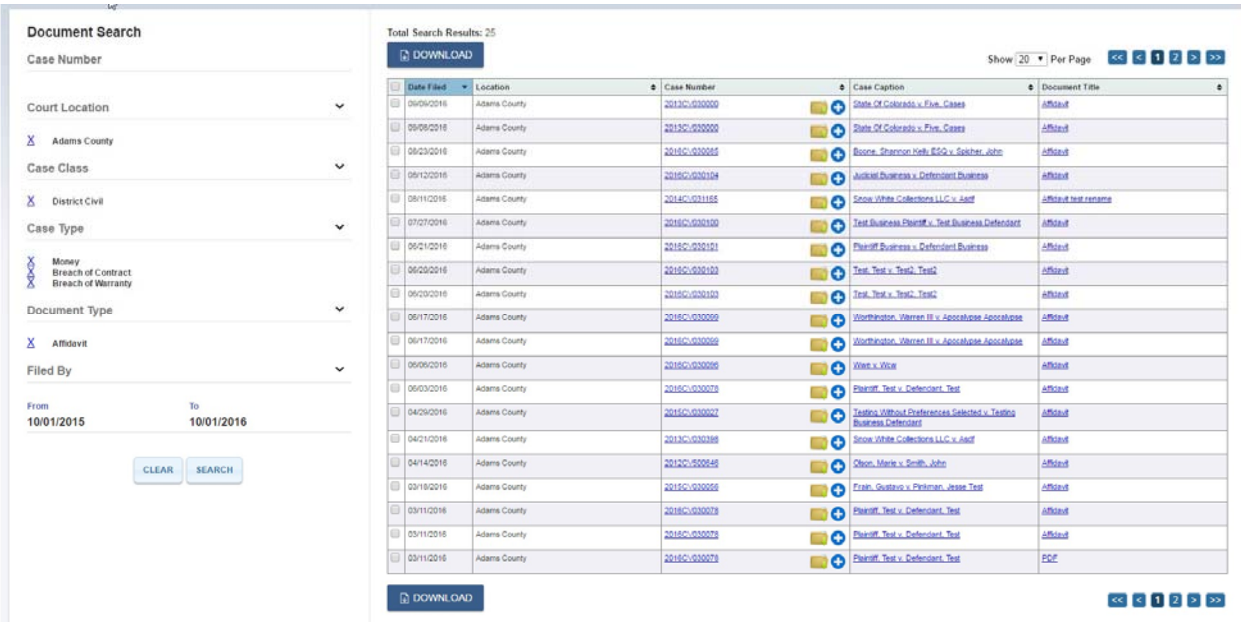
- If Smi* is entered, the system will search for cases where the party’s name starts with SMI.
- If * ith * is entered, the system will search for cases where the party’s name contains ITH.

d. **Business Name:** This allows you to search for a specific business cases. This search is a wild card search.

- If Smi* is entered, the system will search for cases where the party’s name starts with SMI.
- If * ith * is entered, the system will search for cases where the party’s name contains ITH.

7. **Date Search:** You can search documents from the last 7 days or you can enter a specific date range.

DOCUMENT SEARCH RESULTS – SEARCH CRITERIA DISPLAY, FILTER AND TABLE COLUMNS



1. **Show:** View 20, 50 or 100 results per page. Click the arrow and select a viewing preference.

2. **Date Filed:** Displays the date the case or document was filed with the court.

3. **Location:** Displays court location of the case.

4. **Case Number**: A hyperlinked number assigned to the case as it relates to the court location. View case history by clicking on the case number hyperlink.

    a. File Folder icon: Click to file into the existing case.

    b. Monitor icon: Click to move case to your monitored cases list.

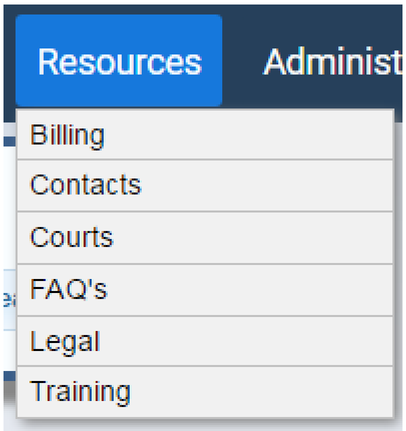
5. **Case Caption:** This displays the caption as accepted or created by the court. Click the hyperlinked case caption to view case information.

6. **Document Title:** Details the document's title and allows you view the document (only if you access).

RESOURCES

RESOURCES – HOW TO FIND

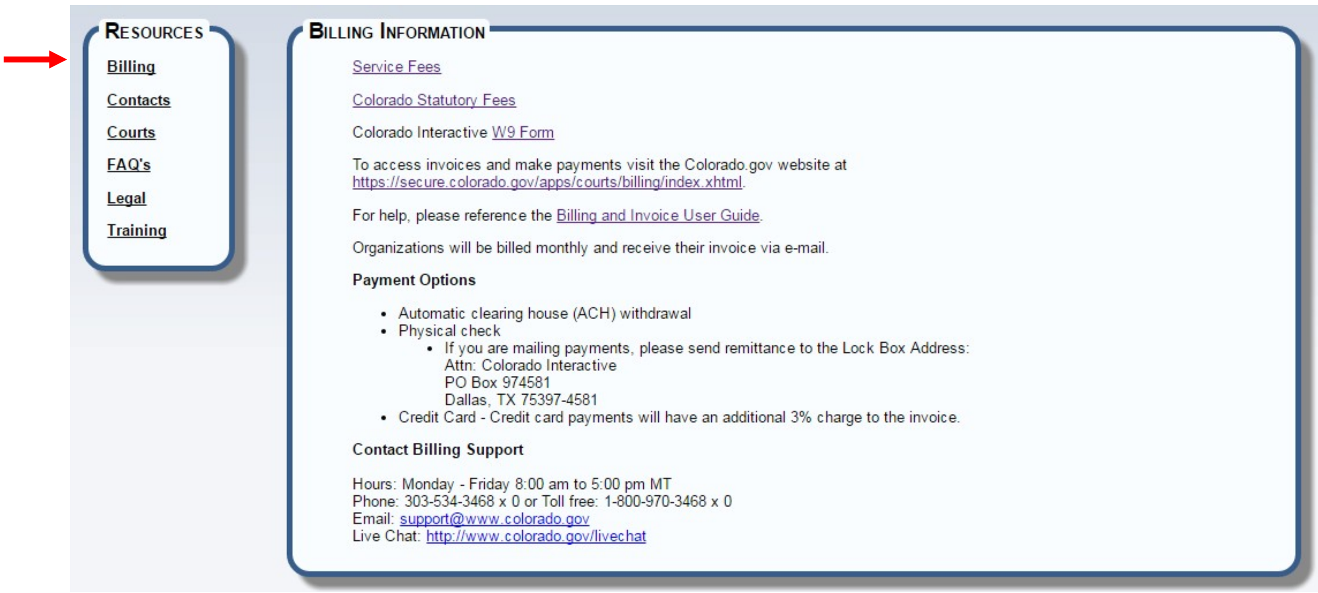
Click Resources from the menu bar.



Hover over the Resources tab and choose a specific option from the drop down menu.

CONTACT INFORMATION

BILLING INFORMATION

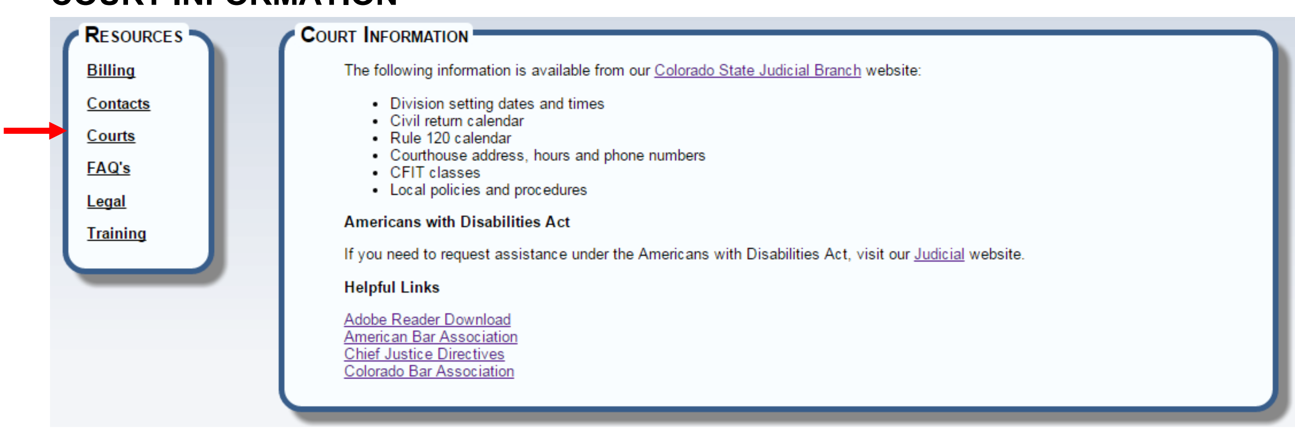


The Billing screen has a link for Service Fees, Colorado Statutory Fees and a link for accessing a PDF of Form W-9.

Reference information is available by clicking the Billing and Invoice User Guide link.

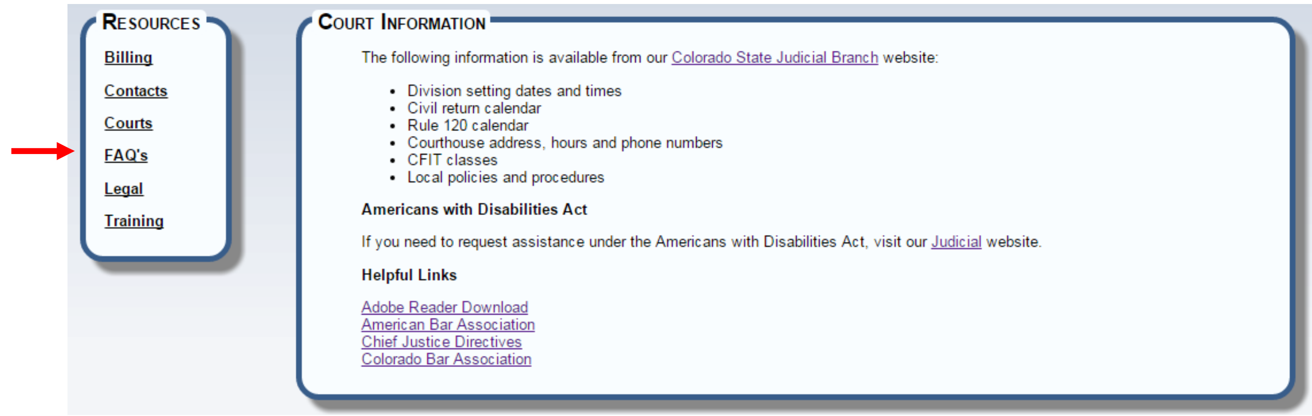
Payments can be made using ACH, Credit Card or Physical Check. A mailing address for mailing payments is listed on this screen.

COURT INFORMATION



The Court Information screen provides a link to the Colorado Judicial Website. Other helpful links are posted including ADA information.

FAQs



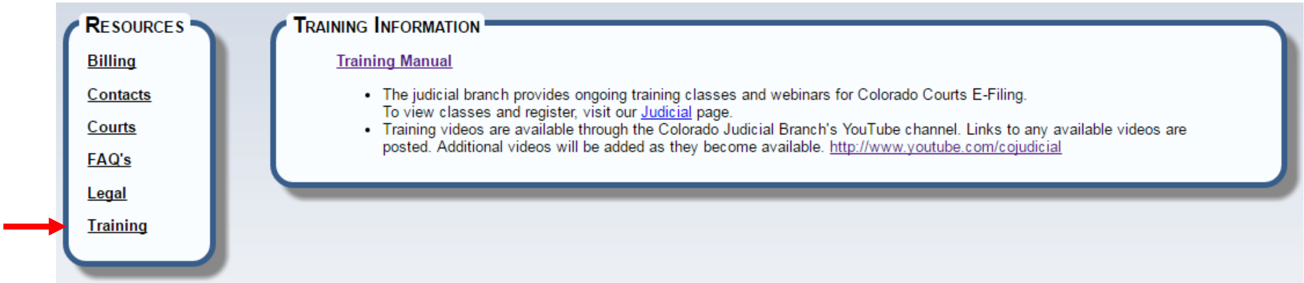
This screen loads a PDF of current Frequently Asked Questions.

LEGAL INFORMATION

There are links for relevant Chief Justice Directives for waiving fees or statewide e-filing standards.

The Terms and Conditions and the Colorado Judicial Privacy Policy links are also included.

TRAINING INFORMATION



Training provides a link to the electronic Training Manual and Colorado Judicial training videos from the YouTube link.

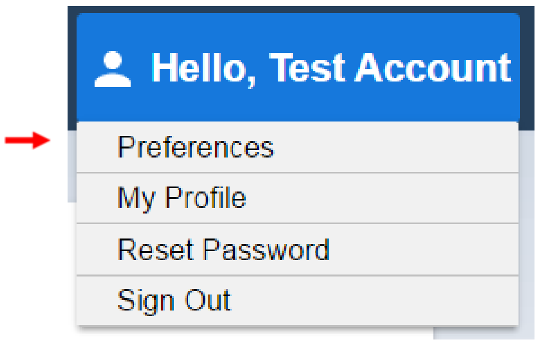
MY ACCOUNT

The “My Account” section features an e-mail and alert preference screen, a profile page and password reset functionality.

PREFERENCES

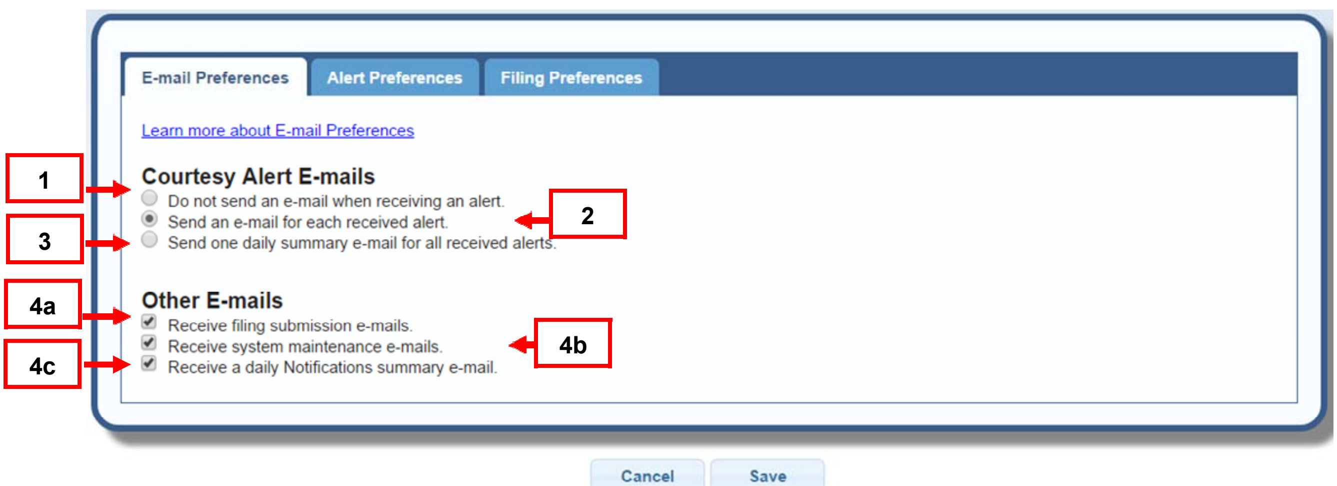
This page features options for receiving, copying or forwarding e-mail or alert notifications.

PREFERENCES – HOW TO FIND



Hover over the “My Account” tab to choose the “Preferences” menu option.

E-MAIL PREFERENCES

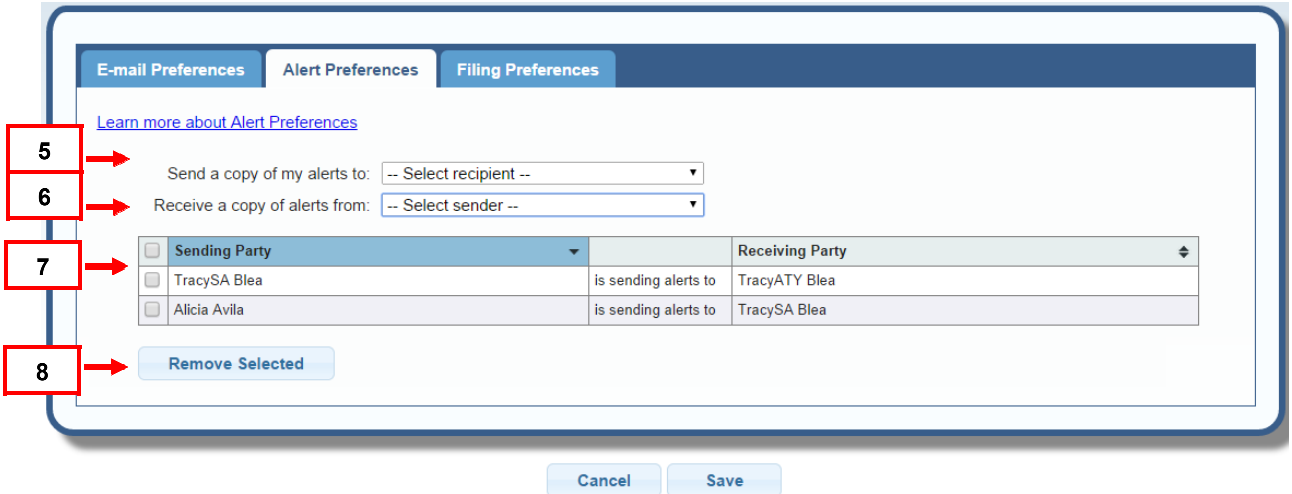


1. Click so the system will not send any e-mail notice of alert items.
2. Click to ask the system to send an e-mail notice of each alert item.
3. Click to ask the system to send one (1) daily e-mail notice of all alert items.
4. (a) Check to receive filing submission e-mails.

   (b) Check to receive system maintenance e-mails.

   (c) Check to receive one (1) daily Notification summary e-mail. (If applicable)

ALERT PREFERENCES



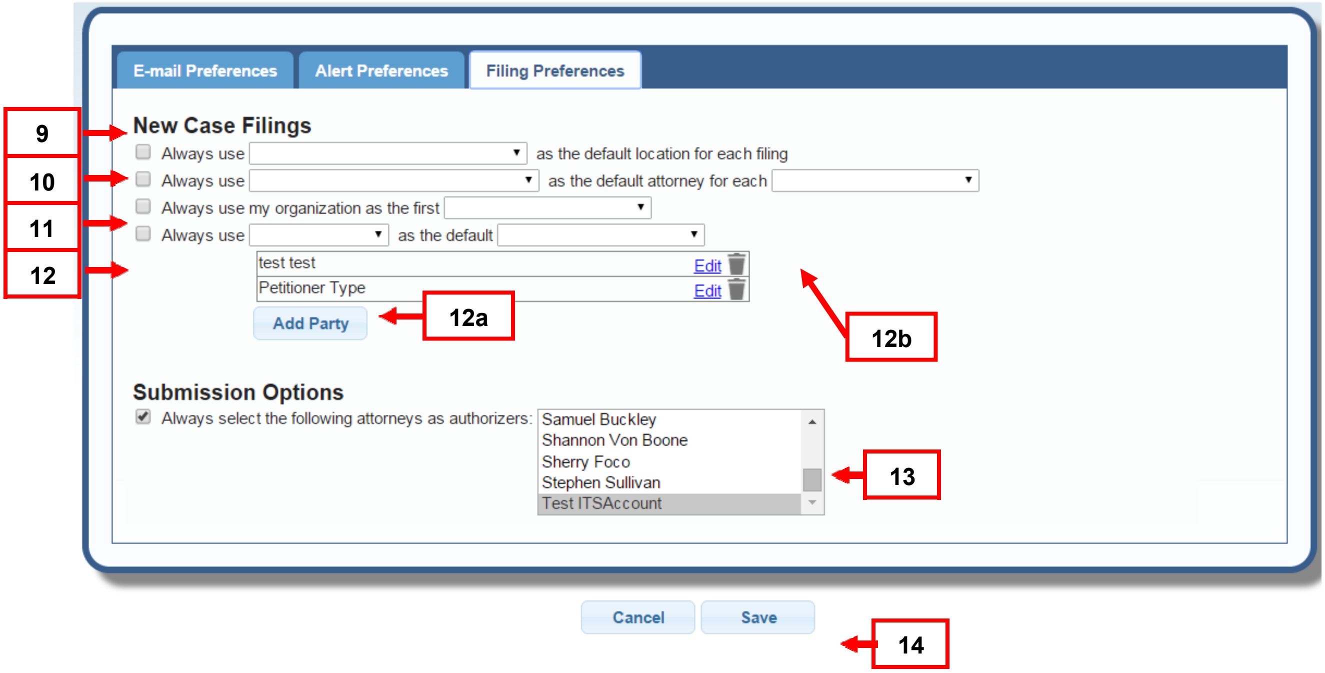
5. Send a copy of a new alert to another user in your organization.

6. Receive a copy of a new alert from another user within your organization.

7. Table displays names of users within an organization designated to send or receive alerts.

8. Click checkbox(es) in the table and then press the Remove Selected button to remove Alert Preferences.

FILING PREFERENCES



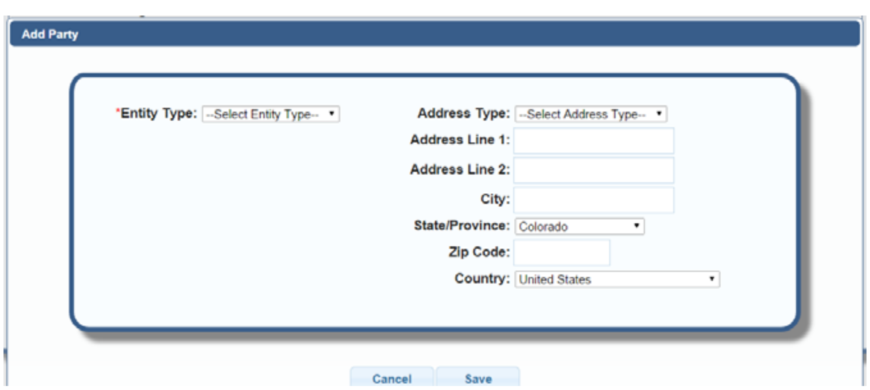
This section provides the ability to preset attorney information and party type defaults so the information on the party screen pre-populates when filing a new case.

9. Click to always use the same court location when filing a new case.

10. Click to always use a specific attorney name (box 1) when a party type is selected in (box 2).

11. Click and select to auto-populate my organization as the first party type.

12. Select checkbox to always use a specifically named party as the default entity type.
    a. Select select the “Add Party” button, complete the party information and save.



    b. Select the desired party party from the dropdown to default as the entity type for each new filing. More than one party name can be added to the table however, only one party can be used at one time as the default entity.

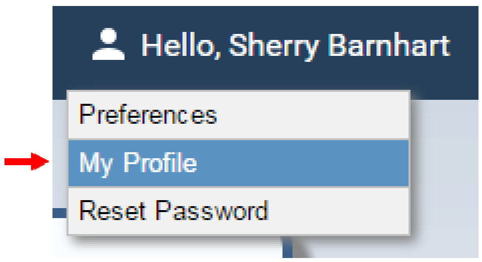
13. Check the box and select from the combo box to auto-populate the authorizing attorney(s) each time a filing is submitted. (hold the down the control key to select more than one)

14. Press the Save button to save all changes in Preferences.

MY PROFILE

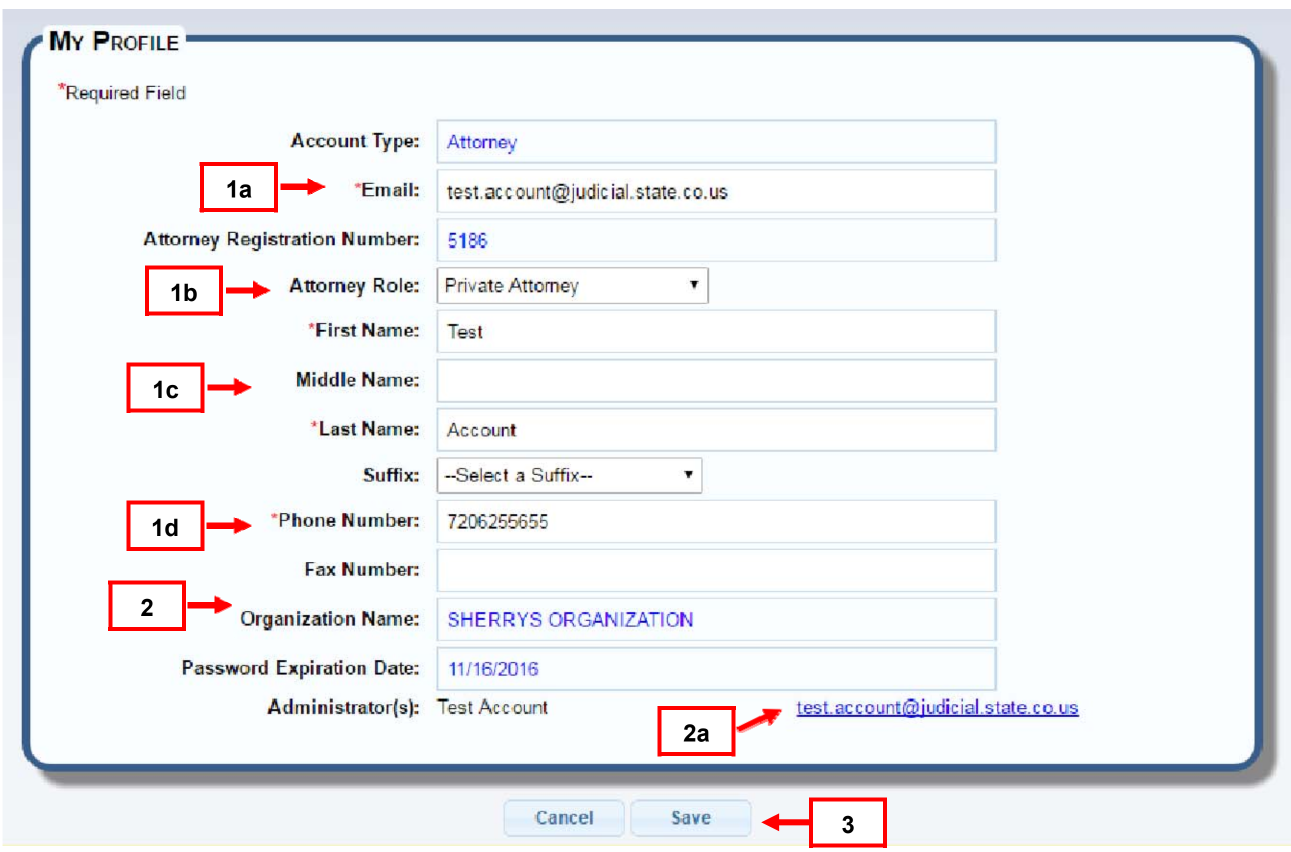
Update personal information on the My Profile page.

MY PROFILE – HOW TO FIND



Hover over the “My Account” tab to choose the “My Account” menu option.

MY PROFILE – OPTIONS



1. The following fields are editable:

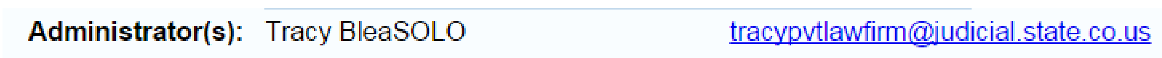
a. E-mail

b. Attorney Role (this field will not display if the user is a Staff Assistant)

c. First, Middle, Last Name and Suffix.

d. Phone and Fax Number

2. Lists the Organization Name and the Administrator(s).
   a. To send an e-mail to an administrator, click on the e-mail hyperlink. This opens a new e-mail in a second window.

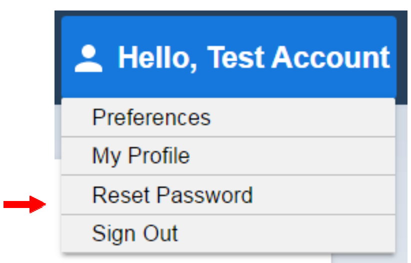


3. Click the “Save” button after any changes are made, or press “Cancel” to exit “My Profile.”

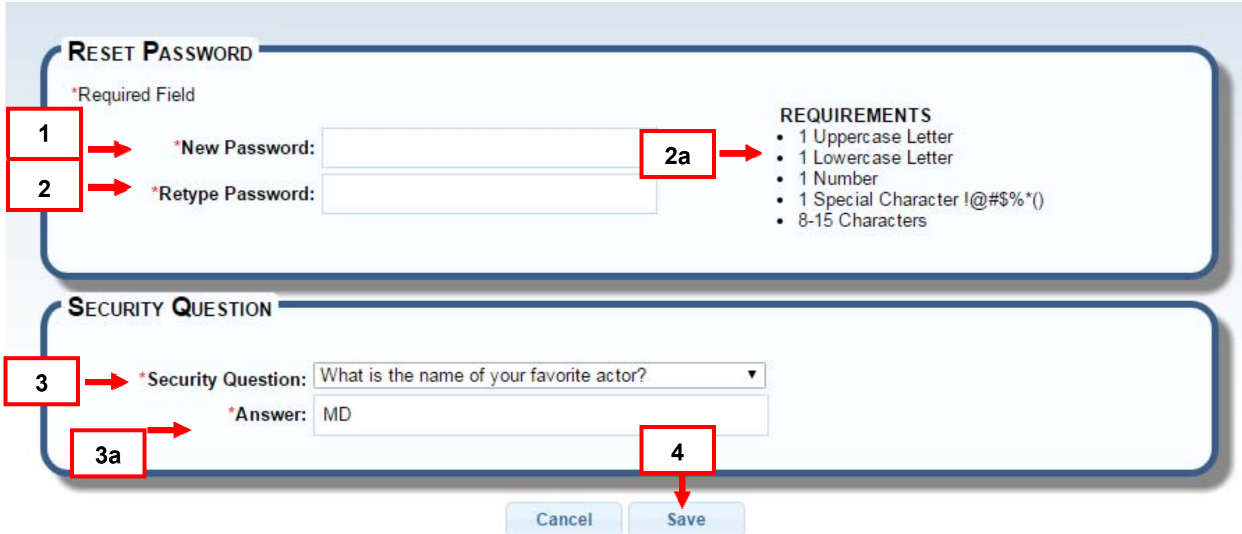
RESET PASSWORD

Also featured on the Reset Password screen is an option to re-select a new security question and answer.

RESET PASSWORD – HOW TO FIND

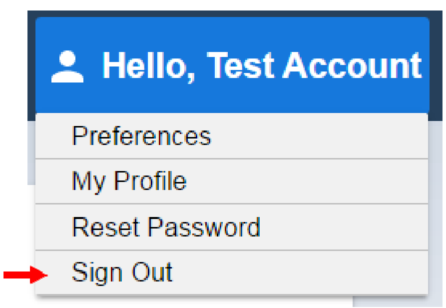


Hover over the “My Account” tab to choose the “Reset Password” menu option.



1. Enter a new password.
2. Re-enter the new password.
    a. A password must contain 1 uppercase letter, 1 lowercase letter, 1 number, 1 special character and at minimum of 8 characters with a maximum of 15 characters.
3. Select a security question.
    a. Enter an answer.
4. Click the “Save” button after any changes are made, or press “Cancel” to exit this screen.

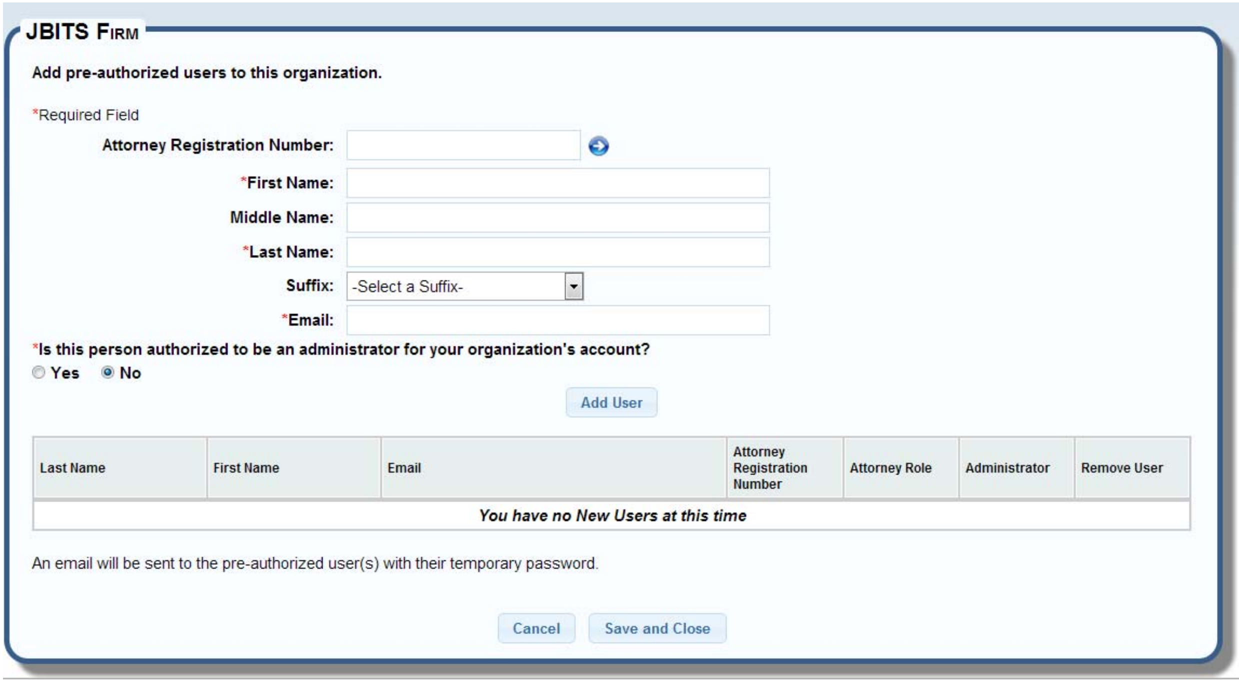
SIGN OUT



Select Sign Out from the Navigation Bar to properly exit the system and close your session.

For security reasons, it is important to ***always sign out*** of the system once your session is finished.

ADMINISTRATOR



ADD USER(S) TO AN ORGANIZATION

- Select Add Users from the Administrator tab on the Menu Bar
- Adding an Attorney
  - Enter the Attorney Registration Number and click the Blue Arrow. This will pull the attorney information from ATR. If no information is returned, this attorney does not have an ACTIVE status with ATR and you will not be able to create an attorney account.
  - Select the Attorney Role that applies to this attorney
  - Enter the first name, last name and email address of the new user
  - Determine if this user will be an Administrator (Note: radio button is defaulted to NO)
- Adding a Staff Assistant
  - Enter the first name, last name and email address of the new user
  - Determine if this user will be an Administrator (Note: radio button is defaulted to NO)
- Click Add User button

- o The name of the new user will appear in the table. Continue to enter the all the new users for your organization and the table will build dynamically. Any entry may be removed from the list by clicking the trash can under the Remove User column.

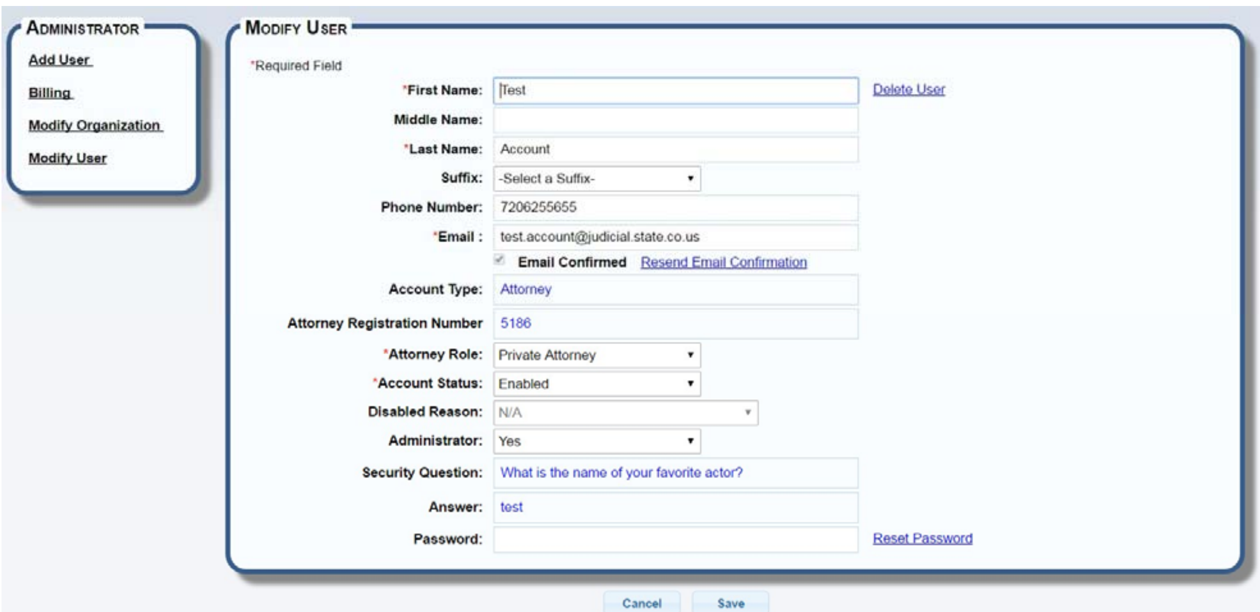
- Click the Save and Close button
  - o An email will be sent to the pre-authorized user(s) with instructions to activate their account.

INDIVIDUAL REGISTRATION PROCESS

- A new user will receive an email with a hyperlink to activate their account.
- User will click on the hyperlink contained within the email (this process will activate their account)
- User must accept the Terms and Conditions to continue
- User is directed to the Reset Password page
  - o A new password must be entered
  - o The user must select a Security Question and Answer
- Registration process completed
- The Administrator will be directed to the Modify Organization screen to enter the contact information for the organization. This is a required step and the administrator will not have access until it is complete.

MODIFY AN ORGANIZATION

- Select Modify Organization from the Administrator tab on the Menu Bar
- Make any changes to the address, phone number and fax number and click Save
- Billing Contact – this is a dropdown box that has all the users at the organization. At any time you may change the name of the billing contact.
    - You may have up to two billing contacts for your organization.
    - Billing contacts will be notified when an invoice is ready to be paid.
- Administrator(s) – the name of the administrator(s) will be listed along with their email address
    - The email address is a hyperlink that will open an email to that administrator in a second window.



MODIFY A USER ACCOUNT

- Select Modify User from the Administrator tab on the Menu Bar
- Search for the name of the user and double click on their name in the search results table
- Make any changes to the name and email information and click Save
- Email Confirmed Checkbox
    - If this is checked the user has received an email from the Colorado Courts E-Filing system, clicked on the hyperlink and completed the registration process

- If this is not checked the user has not completed the registration process and activated their user account.

- Click the Resend Email Confirmation hyperlink to resend an email that contains the hyperlink for account activation and a temporary password
    - An administrator may check the Email Confirmed checkbox to force activation. This is not recommended. It is important to confirm the user is receiving emails from the system and complete the registration process.

- The Attorney Role is a field that will only appear if the user is registered as an attorney. The attorney role may be changed and will be reflected on the My Profile page of their account. This will populate the Attorney Role field on the Review and Submit page of the file builders.

- The Security Question and Answer may not be changed by an administrator.

- An administrator may give a temporary password
    - The temporary password may be typed into the Password field or the Reset Password hyperlink may be clicked and the system will send an email to the user with password reset instructions.
    - Once a user logs in with the temporary password or via the emailed reset password link the user will be directed to the Reset Password screen under My Account and they will be required to change their password before using the system.

- To delete a user click the Delete Account hyperlink. You will be prompted with a pop-up to verify the deletion of this account.