

eFILER INSTRUCTIONS

EFILE A NEW FORMAL CIVIL CASE:

To submit an eFile request for a new formal civil case the court requires the complaint and civil cover sheet as separate PDF documents.

Add Case Type and Action:

The screenshot displays the eFiler interface. At the top, there is a dark grey header with the text 'My Filings' in white. Below this header, there are two blue buttons: 'Create New Case Request' and 'Create Subsequent Filing'. To the right of these buttons is a text input field labeled 'Case Number'. Below the buttons and input field, there is a section titled 'New Case Request' with a dark grey header. This section contains several fields: 'Filer' (Derrick Wallner), 'Status' (Draft), 'Attorney Bar No' (011085), 'Attorney' (Derrick Wallner), and 'Reference Tags' (14789). Below these fields, there are two dropdown menus: 'Case Type*' (set to 'HND Civil') and 'Initiating Action*' (set to 'Choose One').

1. From the 'My Filings' queue
2. Click on the 'Create New Case Request' button (top of screen)

(This will take you to the New Case Request screen)

NOTE: *Fields in red denote required information.*

3. Update the Attorney Bar No. field, if desired.
 - Attorney Bar No defaults to the bar number of the eUser logged in but can be changed to any valid bar no that is *registered* as an eUser and exists in CourtView.
4. Enter a Reference Tag, if desired
 - The 'Reference Tags' field is a free formed text field to help the filer identify the case (such as an internal case or tracking number)
5. Select the Case Type "HND Civil" from the drop down list
6. Select the Initiating Action from the drop down list.
 - The Initiating Action is determined by the type and amount of the claim.

Add Party Information:

The screenshot shows a web form for adding party information. The form is titled "Parties" and is for "Party 1". It is divided into several sections:

- Party Information:** Party Type* (Defendant), Role Type, Rep by Atty (checked), On Behalf Of, Last Name* (Lambeau), First Name* (Curly), Middle Name, Suffix, DOB (MM/dd/yyyy), SSN #, and Company*.
- Contact Information:** Address Type (HOME ADDRESS), Address (1265 Lombardi Ave), City (GREEN BAY), State (WISCONSIN), Zip (54304), Phone Type, Phone ((###) ###-####), and Email (GoPackGo@gmail.com). There are "Add Contact Information" and "Delete" buttons.
- Affiliation/Alias:** "Add Affiliation/Alias" button.

1. Select the 'Party' type using the drop down list
2. Click the 'Rep by Atty' field for those parties represented by the attorney listed at the top of the screen.
3. Click the 'On Behalf Of' field when filing on behalf of the Plaintiff.
4. Enter the name of the party using either:
 - Last, First, Middle Name fields (Suffix field, if applicable)
 - OR-
 - Company field
5. Select the Address Type using the drop down list (ONLY if an address will be entered)
6. Enter Address information (required by court)
 - a. The Address Type field becomes a required field if the address fields are populated
 - b. There are 3 address lines in addition to the City, State, Zip fields
 - c. Entering the Zip code will populate City and State
 - d. Zip code entered MUST be a valid zip code within CourtView
7. Select the Phone Type (ONLY if a phone number will be entered, not required)
8. Enter Phone No
9. Enter email (if desired) or if you want parties emailed when filings occur.
10. If the party has an alias, dba or other affiliation, Click the '**Add Affiliation/Alias**' button
 - a. Select the down arrow on the 'Affiliation' field
 - b. Select the appropriate affiliation or alias type
 - c. Enter Last Name, First Name
 - OR-
 - Enter Company Name

Note: You can Click the 'Add Affiliation/Alias' button to add additional affiliations/alias for this party
11. Add your second party following instructions # 7-15

Note: The 'New Case Request' screen displays data fields for two parties.
To Add Additional Parties:

 - a. Click the '**Add Party**' button
 - b. Continue to follow instructions # 7-16 until all parties are entered

Add Documents:

The screenshot shows a 'Documents' interface with two document entries. Each entry includes a 'Document Type' dropdown, a 'Page Count' field, a 'Document Note' text area, and an 'Attachments' table. The 'Attachments' table has columns for 'File Name', 'Page Count', 'Date Uploaded', 'Supplemental' (checkbox), and 'Delete' (link). Document 1 is titled 'Document 1' and has a 'Document Type' of 'CIVIL COVER SHEET: Debt Collection Agency Case', a 'Page Count' of 1, and an attachment named 'Civil Cover Sheet.pdf'. Document 2 is titled 'Document 2' and has a 'Document Type' of 'INITIAL FILING: Complaint Filed', a 'Page Count' of 3, and an attachment named '2Complaint.pdf'. An 'Add Document' button is located at the bottom left of the interface.

1. Select the 'Document Type' using the drop down list
 - a) For this case type you must include a Civil Cover Sheet. The type of Cover Sheet you select here is determined by what was entered on the document.
2. Enter 'Document Note' text if desired.

Note: 'Document Note' is a free-formed field allowing you to add additional information regarding the document being filed. Information entered in this field will be included in the docket text in the Court's record for this case if accepted by the Reviewer.
3. Upload your PDF attachment by Clicking the 'Browse' button
4. Navigate to your document to attach
5. Select the appropriate document by double-clicking the document
 - a. If a PDF is uploaded and exceeds the max file size allowed by the Court, a message displays, "File is too large to attach"
 - b. To view your attached document, Click on the document name
 - c. To remove your attached document, Click the 'Delete' button to the right of the document name
6. Click the 'Add Document' button to begin attaching the complaint.
7. Select the 'Document Type' of "INITIAL FILING: Complaint Filed."
 - a. Follow instructions # 2-5

Note: Only the first page of documents will be file stamped. If your complaint contains supporting documents that you wish to file with the Court, they must be filed as exhibits within the complaint. Alternatively, you may add additional documents to the case using any available subsequent filing type listed in the 'Document Type' drop down.

Filing Note:

The screenshot shows a 'Filing Note' field, which is a large text area with a vertical scrollbar on the right side.

The Filing Note field located at the bottom right of the screen allows the Filer to give additional information regarding the filing. This information will be seen by the Reviewer and will also be visible on the eFile record in your 'My Filings' queue. This information is NOT stored in CourtView.

Cost Section:

The Cost Section, at the bottom of your screen, displays a detailed description of the amount you will be required to pay to submit your Filing(s).

- **Convenience Fee** - A percentage of the Total. Only applied on credit card transactions.
- **Action Costs** - Total of Document Fees associated to the Initiating Action code selected.
- **Document Fee** - Amount associated to the Docket(s) selected if any.
- **Total** - Total of Convenience Fee, Action Costs, and Document Fee
- **Paid** - Amount paid on case
- **Owed** - Amount owed on filing

Convenience Fee	\$.00
Action Costs	\$274.00
Total	\$274.00
Paid	\$.00
Owed	\$274.00
Account Balance	\$13,018.00
Allocated	\$496.00
Balance Remaining	\$12,248.00

Note: *The following fields ONLY display in the Cost Section for Receipt Depositor filers. (This feature is available at the Court's discretion.)*

- **Account Balance** - Total amount available on the Receipt Depositor account, attached to the Filer.
- **Allocated** - Amount allocated to current filings that have not yet been accepted by the Reviewer.
- **Balance Remaining** - Total balance remaining on the Receipt Depositor account, attached to the Filer.

1. Select '**Continue with Filing**' to continue with the filing process

Cancel Save Continue with Filing
Cancel – Returns you to the 'My Filings' work queue and cancels any additions or changes made to the New Case or Subsequent Filing request. Information entered on your screen will NOT be saved if you select this option.
Save – Saves any additions or changes made to the New Case or Subsequent Filing request.
Continue with Filing – Continues to the next screen or options

Note: *When the 'Save' or 'Continue with Filing' options are chosen, a unique identifying number, known as the 'eFile ID', will automatically be assigned to the Filing. This number will help track the Filing as it proceeds through the system.*

2. Select '**Add to Cart**' to continue with the filing process

Return Modify Add to Cart
Return – to return to 'My Filings' queue
Modify – to make changes or modifications to your filing
Add to Cart – to continue with the eFile process

Important: *The Filing Cart allows a filer to process and submit more than one Filing at a time, during the session. The cart lists the filings separately with the 'Total' fees owed being displayed.*

3. Select '**Submit Filings and Pay Now**' to submit your Filings to the Court

FILING CART:	
Return to My Filings	– To return to 'My Filings' queue
Submit Filings	– To submit your Filings to the Court
Note:	Selecting this option will automatically navigate to the PayPal payment option (unless you have a Receipt Depositor account set up with the Court)
Remove from Cart	– Removes a Filing from the cart
	- Check the Box in the right margin of the Filing you wish to remove
	- Click the ' Remove from Cart ' button

4. Follow instructions on the screen to make your payment to complete your eFiling transaction
5. Click on '**MY FILINGS**' to return to your filing que

Note: Filings are NOT file time stamped until the file is accepted and approved by the court.

Note: User will receive an email that the filing was submitted, and as the status changes to in review/ Accepted will receive emails stating the status.