



# **Lake County, Indiana E-Filing System**

## **Quickstart Guide for Clerks**

**Version 2  
July, 2010**

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# E-Filing System For Clerks

## Introduction

### **What the System Does**

The Lake County Indiana E-Filing System allows Clerks and Supervisors to:

- Process new cases
- Process new filings
- Add a filing to an existing case

Supervisors may also:

- View Working Queue counts by location

### **Hardware and Software Requirements**

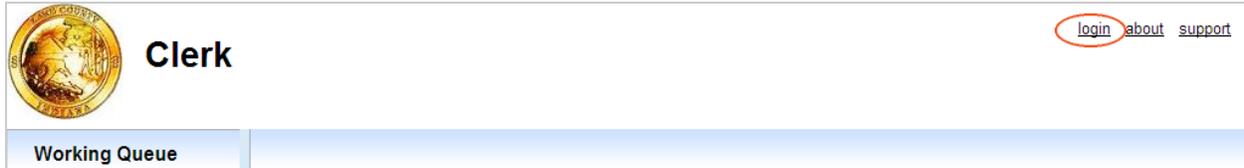
A PC running Windows and either the Firefox browser or Internet Explorer version 8 is the required configuration. The Firefox browser is recommended. If you are using Internet Explorer, you can identify its version number by clicking on Help in the toolbar and then clicking on About Internet Explorer.

Documents filed through E-Filing must be in PDF format and all PDFs must be at least 300dpi resolution to meet state standards for archiving.

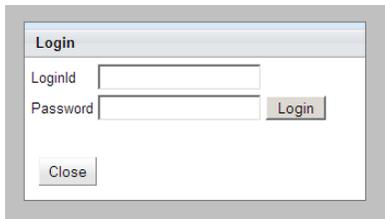
**NOTE:** The system will time out after fifteen minutes of inactivity so make sure you save your work as you make your changes.

# Getting Started

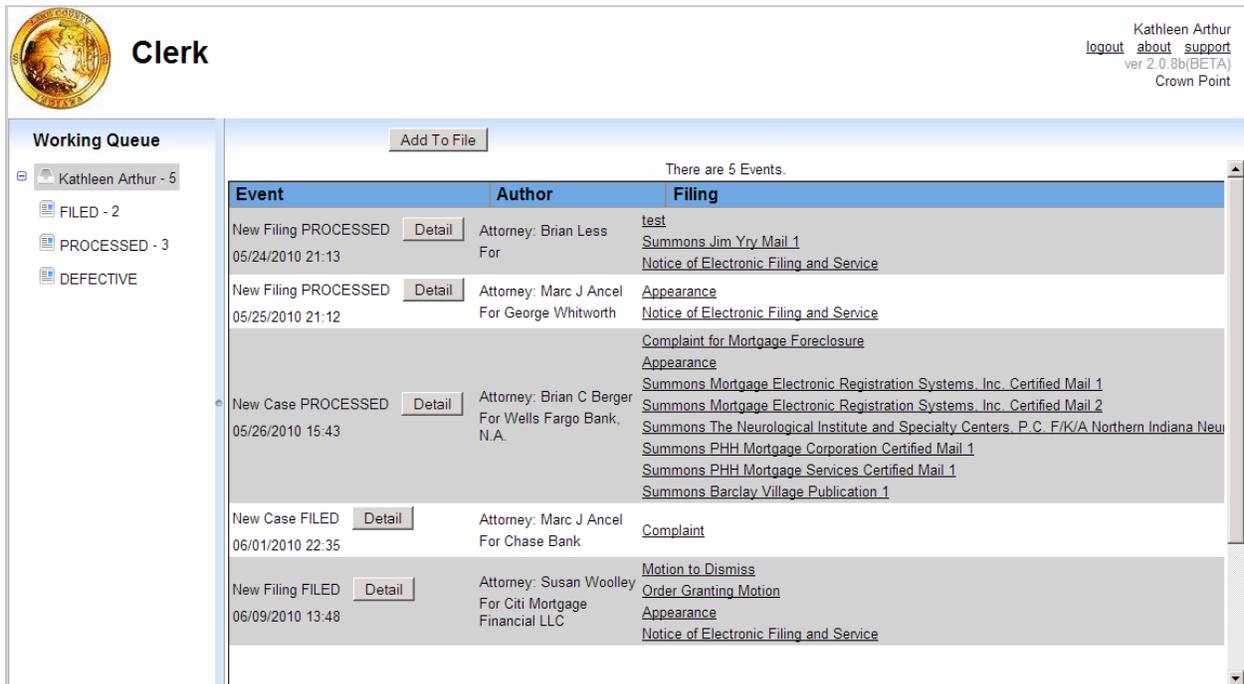
1. Go to the Lake County E-filing Web site and click [Login](#).



2. Enter your Login ID and Password and click the [Login](#) button.



You are now viewing the [Clerk Working Queue](#) screen.



**NOTE:** The system assigns work to the [Working Queues](#) based on a rotation. Your [Working Queue](#) can also contain cases or filings routed to you from other Clerk or Court staff members for processing.

The summary information on the left shows the total number of events in your queue as well as the number that have been FILED, PROCESSED, and identified as DEFECTIVE.

The right side of the screen shows the details of the events.

3. Note the columns:

- The **Event** column identifies the events in your **Working Queue**. New cases and new filings that require processing are identified as “New Case FILED” or “New Filing FILED.” Cases and filings already accepted are identified as “PROCESSED.”
- The **Author** column identifies the source of the case or the filing.
- The **Filing** column lists all the associated documents.
- Supervisors also see the **Case** column, which identifies the case name and the case number.

Note also the page numbers at the bottom of the screen.



4. You may click on the **Detail** button next to each event or the **Document Link** to display further information on the event or the document; these functions are explained in the **Process a New Case** section of this guide.



5. If you are a Supervisor, you may also choose to see events in other individual Clerk or Supervisor **Working Queues** by selecting a name from the drop-down and clicking the **Show Queue** button.

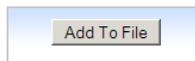


As explained in the following sections, Clerks and Supervisors may:

Process a New Case from the [Working Queue](#).

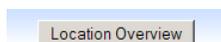
Process a New Filing from the [Working Queue](#).

Add a filing to an existing case using the [Add to File](#) button.



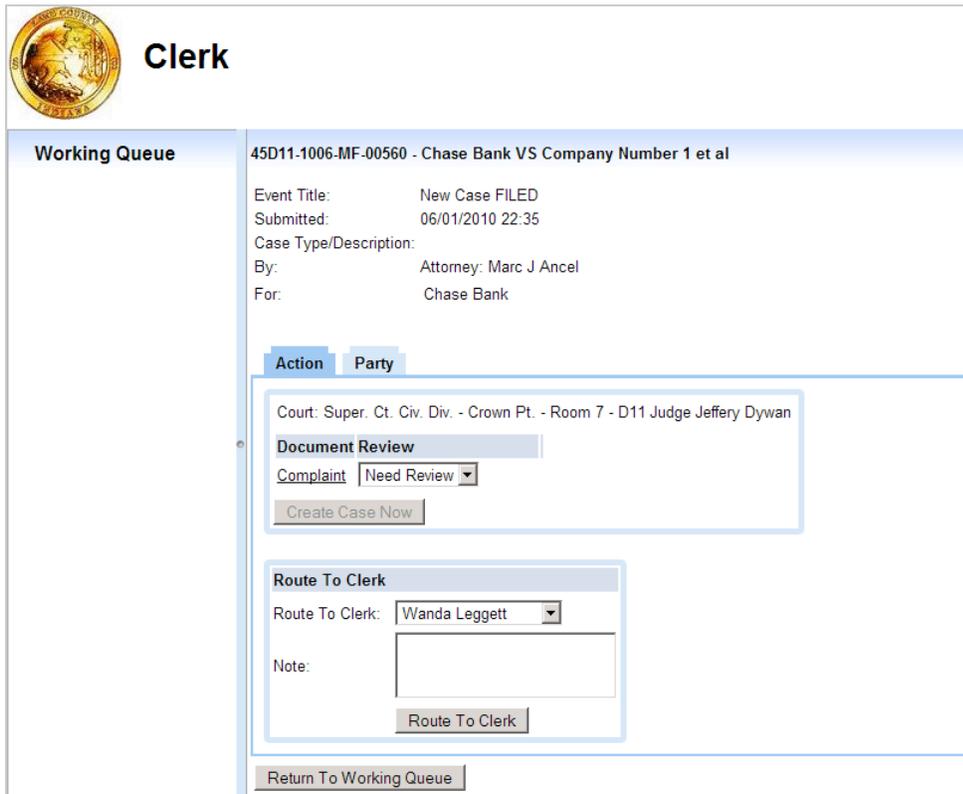
Supervisors may also:

View [Working Queue](#) counts by location using the [Location Overview](#) button.



## Process a New Case

1. Click on the **Detail** button next to a “New Case FILED” event in the **Working Queue**. The case information is displayed.



The screenshot shows the Clerk interface for a case. At the top left is the Lake County seal and the word "Clerk". Below this is a "Working Queue" sidebar. The main area displays case information for "45D11-1006-MF-00560 - Chase Bank VS Company Number 1 et al". The event title is "New Case FILED", submitted on "06/01/2010 22:35". The case type is "Complaint" and the description is "Need Review". The attorney is "Marc J Ancel" and the party is "Chase Bank". There are two tabs: "Action" (selected) and "Party". The "Action" tab contains a "Document Review" section with a "Complaint" dropdown and a "Need Review" dropdown, and a "Create Case Now" button. Below that is a "Route To Clerk" section with a "Route To Clerk" dropdown set to "Wanda Leggett", a "Note" text area, and a "Route To Clerk" button. At the bottom is a "Return To Working Queue" button.

Note the summary information at the top and the **Action** tab, displayed in the middle of the screen. You may also click the **Party** tab to view the parties on the case. Click the **Action** tab again to display.

2. Verify the documents listed in the **Document Review** box.

For each document:

- Click on the **Document Link**; the system displays the document in a new browser window or tab.

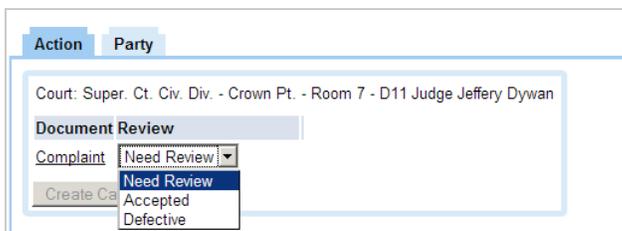


- Verify that the document is not blank and is legible.
- If there are multiple pages, use the controls in the Navigation Panel on the left to page through the document.



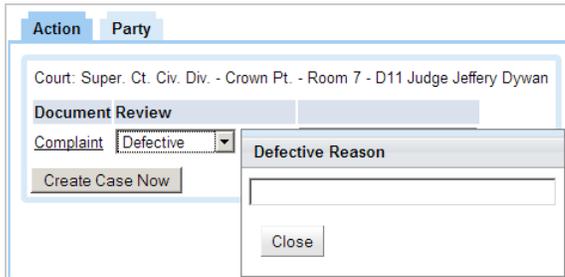
- When you are done, close the browser window or tab.

3. Once the review is complete for that document, select the appropriate descriptor from the **Review** drop-down.



- If the document is of acceptable quality, select **Accepted**.

- If the document is not of acceptable quality, select **Defective**. Add a note to explain the problem.

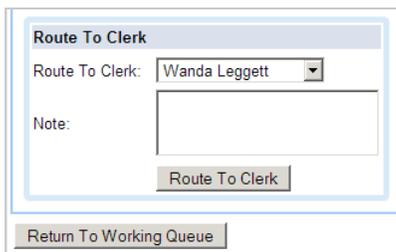


The screenshot shows a software interface with two tabs: 'Action' and 'Party'. Below the tabs, the text reads 'Court: Super. Ct. Civ. Div. - Crown Pt. - Room 7 - D11 Judge Jeffery Dywan'. There is a 'Document Review' section with a 'Complaint' dropdown menu set to 'Defective'. Below this is a 'Create Case Now' button and a 'Defective Reason' text input field. A 'Close' button is located at the bottom right of the form.

- Leaving **Needs Review** indicates the document has not been reviewed and action is still required.

4. Continue reviewing all the documents in the case. You will not be able to file the case until all documents are **Accepted**.

5. You may also route the case to another Clerk or Supervisor as needed. Cases may be routed during a new case or new filing event at anytime during your review process. The **Route Case** box appears on all screens.



The screenshot shows a 'Route To Clerk' dialog box. It contains a 'Route To Clerk:' label followed by a dropdown menu currently showing 'Wanda Leggett'. Below this is a 'Note:' label and a text input field. At the bottom of the dialog is a 'Route To Clerk' button. Below the dialog box is a 'Return To Working Queue' button.

- Select the appropriate person from the **Route To** drop-down list.
- Add a **Note** to the routing recipient, if desired.
- Click **Route To Clerk**.

**NOTE:** Supervisors can use this feature to balance the work load between Clerks based on demand and staff availability.

6. Once all documents have been reviewed and accepted, click **Create Case Now**; the system returns you to your **Working Queue** and lets you know it is processing the case.



The screenshot shows a status bar with the following information: 'New Case FILED' followed by a red 'Processing' status indicator. To the right, it says 'Attorney: Marc J Ancel For Chase Bank' and a 'Complaint' link.

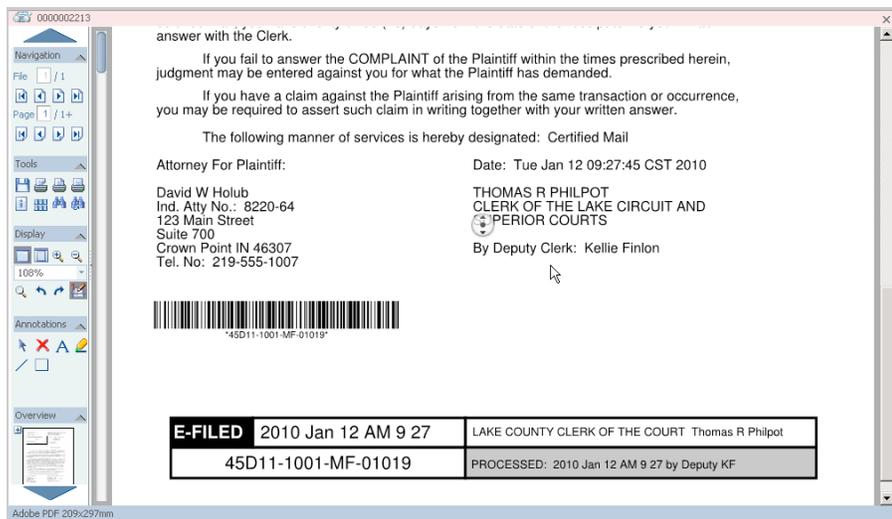
Once processing is complete, the system has generated appearances and summons, updated Courtview, and created the case in the system. The case is now identified as "New Case PROCESSED" in the **Working Queue** and all documents will be accessible here as well as in CCS.

New Case PROCESSED 06/01/2010 22:35	<a href="#">Detail</a>	Attorney: Marc J Ancel For Chase Bank	<a href="#">Complaint</a> <a href="#">Appearance</a> <a href="#">Summons Company Number 1 Certified Mail 1</a> <a href="#">Summons Company Number 1 Sheriff 2</a> <a href="#">Summons Company 3 Certified Mail 1</a> <a href="#">Summons Company 3 Sheriff 2</a> <a href="#">Summons Company 6 Certified Mail 1</a> <a href="#">Summons Company 6 Sheriff 2</a> <a href="#">Summons Company 7 Certified Mail 1</a> <a href="#">Summons Company 7 Sheriff 2</a> <a href="#">Summons Company 8 Certified Mail 1</a> <a href="#">Summons Company 8 Sheriff 2</a>
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**NOTE:** You may also file a document on an existing case once it has been processed from this screen by clicking on the **File Document** button. This process is explained in the **Add to File** section of this guide.

7. Print the documents as needed:

- Click on each **Document Link** in the **Filing** column of **Working Queue**. The system displays the document in a new browser window.

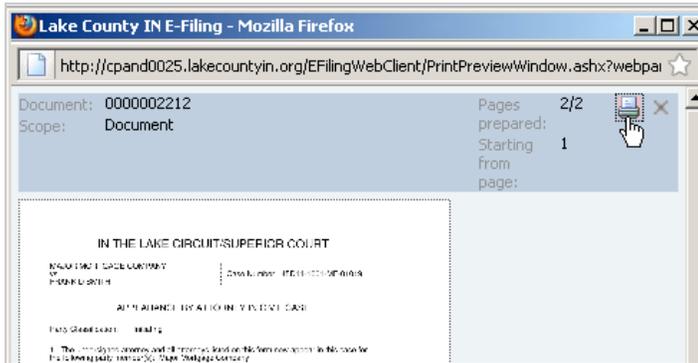


Note the bar code and E-FILED stamp added to the documents when the case was processed.

- Click on the Print icon in the toolbar on the left:



The system displays a preview of the document.



- Click the print icon at the top right of the window to print.

8. Once a new case is created, you may view case information as needed by clicking on the **Detail** button next to “New Case PROCESSED” in the **Event** column; the system displays the case information.

45D11-1006-MF-00560 - Chase Bank VS Company Number 1 et al

Event Title: New Case PROCESSED  
Submitted: 06/01/2010 22:35  
Case Type/Description: Mortgage Foreclosure - Foreclosure-Mortgage  
By: Attorney: Marc J Ancel  
For: Chase Bank

**Action** Party CCS

**Document**

- [Complaint](#)
- [Appearance](#)
- [Summons Company Number 1 Certified Mail 1](#)
- [Summons Company Number 1 Sheriff 2](#)
- [Summons Company 3 Certified Mail 1](#)
- [Summons Company 3 Sheriff 2](#)
- [Summons Company 6 Certified Mail 1](#)
- [Summons Company 6 Sheriff 2](#)
- [Summons Company 7 Certified Mail 1](#)
- [Summons Company 7 Sheriff 2](#)
- [Summons Company 8 Certified Mail 1](#)
- [Summons Company 8 Sheriff 2](#)

**Route To Clerk**

Route To Clerk:

Note:

**Route To Court**

Court: Super. Ct. Civ. Div. - Crown Pt. - Room 7 - D11 Judge Jeffery Dywan

Note:

Note the following:

- The documents are available to view via **Document Links** at in the **Action** tab.
- You may route the case to the Court (bottom right of screen) or to another Clerk or Supervisor (bottom left of screen) by adding an optional message and clicking the appropriate **Route To** button.
- You may mark the case as done by clicking the **Mark as Done** button.
- Click the **Return to Working Queue** button when you are done.

## Process a New Filing

1. Click on a “New Filing FILED” link in the **Working Queue**. The case information is displayed.

45C01-1005-MF-00535 - Cyrus Mills VS National Bank LLC et al

Event Title: New Filing FILED  
Submitted: 06/09/2010 13:48  
Case Type/Description:  
By: Attorney: Susan Woolley  
For: Citi Mortgage Financial LLC

**Action** Party CCS

Court: Cir. Ct. - Civil - Crown Point - C01 Judge Lorenzo Arredondo

Document	Review
<a href="#">Motion to Dismiss</a>	Need Review ▼
<a href="#">Order Granting Motion</a>	Need Review ▼
<a href="#">Appearance</a>	Need Review ▼
<a href="#">Notice of Electronic Filing and Service</a>	Need Review ▼

**Route To Clerk**

Route To Clerk: Wanda Leggett ▼

Note:

2. Verify the newly filed documents listed in the DOCUMENT VERIFICATION box as described in **Steps 2 and 3** of the **Process a New Case** section of this guide.

3. Once all documents have been reviewed and accepted, click **Complete Filing**; the system returns you to your **Working Queue** and lets you know it is processing the filing. It then updates the system and shows the filing as “New Filing PROCESSED.”

New Filing PROCESSED  Attorney: Susan Woolley [Motion to Dismiss](#)  
06/09/2010 13:48 For Citi Mortgage [Order Granting Motion](#)  
Financial LLC [Appearance](#)  
[Notice of Electronic Filing and Service](#)

4. Print the documents as needed as described in **Step 7** of the **Process a New Case** section of this guide.

## Add To File

Click the **Add to File** tab to add a filing to an existing case as needed (e.g., walk-ins, etc.).

The screen shows the Wizard Summary on the left and the **Add to File** steps on the right.

The screenshot shows a web interface for the 'Add To File' wizard. At the top left is a gold seal with a figure and the text 'CLERK'. To its right is the word 'Clerk'. In the top right corner, the user's name 'Laura Bacino' is displayed with links for 'logout' and 'About'. Below the header, there are two main sections. On the left is the 'Wizard Summary' section, which contains a box with the text 'Please select a valid Case'. On the right is the 'Add To File' section, which is divided into three steps: 'Step 1: Case Selection', 'Step 2: Upload Document', and 'Step 3: Submit Filing'. Step 1 includes a text input field for 'Search Case:' followed by a 'Validate' button and a 'Continue' button below it. Step 2 and Step 3 are currently inactive. At the bottom of the 'Add To File' section is a 'Return To Working Queue' button.

There are three steps:

- Step 1. Case Selection
- Step 2. Upload Document
- Step 3. Submit Filing

The system will display your progress in the Wizard Summary for each of the steps.

## Step 1: Case Selection

NOTE: If case information is already displayed in Step 1, skip to Step 2.

1. Copy and paste or type in the Case Number and click **Validate**. The system finds the case and displays general case information.

**Clerk** Laura Bacino  
[logout](#) [About](#)

**Wizard Summary**

Filing Case  
45D05-1003-MF-00576

**Add To File**

**Step 1: Case Selection**

Search Case: 45D05-1003-MF-00576

Party CCS

Name	Party Type	Representatives
Petro Mohyla	Plaintiff	Craig D Doyle (87773445)
National Bank LLC	Defendant	

**Step 2: Upload Document**

**Step 3: Submit Filing**

2. Make sure that this is the correct case and click **Continue**; the system identifies the selected case in the **Wizard Summary** on the left and hides the case selection information on the screen because you have successfully selected the case as identified by the green checkmark.

NOTE: If you wish to show this information again, simply click in the blue bar for that step. The system also displays the information for the next step, **Upload Document**.

## Step 2: Upload Document

**Clerk** Laura Bacino  
[logout](#) [About](#)

**Wizard Summary**

Filing Case  
45D05-1003-MF-00576

**Add To File**

**Step 1: Case Selection**

**Step 2: Upload Document**

no file selected

File Description	File Name	Access
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**Step 3: Submit Filing**

1. Click the **Browse** button to select the document to upload; the system displays an upload window to allow you to find and select a document. Select the document and click **Open**.

**TIP:** All documents must be in PDF format; you must upload them one at a time.

The system identifies the name of the file you selected next to the **Browse** button.

2. Provide a short **Description** of the document in the space provided.

3. Use the **privacy radio buttons** to identify if the document is protected from public access per Administrative Rule 9. If this is not the case, make sure that all information that needs to be redacted is redacted. Use the **checkboxes** to identify that you have verified that there are no Social Security Numbers shown in the document, no Account Numbers, and no inappropriate inclusion of information about minors.

4. Click **Upload** to upload the document; the percent progress of the upload is shown under the Upload button. Once uploaded, the system identifies the document in the list on the screen, including the **Description** you entered, the **File Name**, and the type of **Access** (e.g., private).

File Description	File Name	Access
Affadavit	Attorney Affidavit.pdf	Private

5. Upload additional documents as necessary.

6. If you need to change the **Description** or **Privacy** settings of any of the documents you've uploaded, click the **Edit** button; the system displays a dialog window you can use to make the changes.



**Edit**

Description:

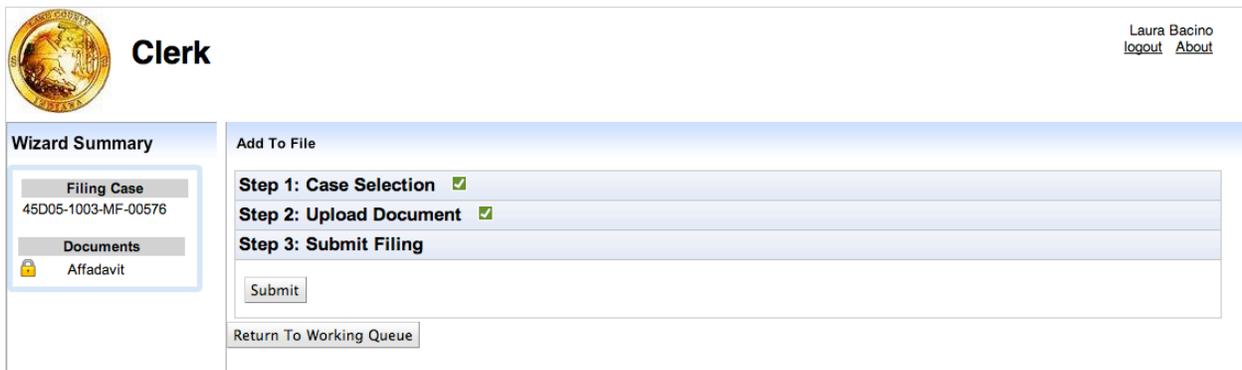
Privacy:

- No public access per Rule 9.
- Redacted for Public Access.
- Verified no Social Security Numbers
- Verified no Account Numbers
- Verified no inappropriate inclusion of Minors

Make the changes and click **Close**.

7. Click the **Continue** at the bottom when all documents have been uploaded; the system identifies the uploaded documents in the **Wizard Summary** on the left and hides the document information on the screen because you have successfully uploaded them as identified by the green checkmark.

**NOTE:** If you wish to show this information again, simply click in the blue bar for that step. The system also displays the information for the next step, **Submit Filing**.



**Clerk**

Laura Bacino  
[logout](#) [About](#)

**Wizard Summary**

**Filing Case**  
45D05-1003-MF-00576

**Documents**  
Affadavit

**Add To File**

**Step 1: Case Selection** ✓

**Step 2: Upload Document** ✓

**Step 3: Submit Filing**

[Return To Working Queue](#)

### Step 3: Submit Filing

1. You are now ready to file your documents.

Click **Submit**; the system files your documents and provides an information message.



The filing will now appear in the **Working Queue**.

**Clerk**Laura Bacino  
[logout](#) [About](#)

**Working Queue**

- Laura Bacino - 5
  - FILED
  - PROCESSED - 5
  - DEFECTIVE

[Add To File](#)

There are 5 Events.

Filing	Author	Filing	Case
Clerk New Filing PROCESSED <a href="#">Detail</a> 03/22/2010 23:20		Return Service	45D05-1003-MF-00576
Clerk New Filing PROCESSED <a href="#">Detail</a> 03/22/2010 23:46		Return Service ABC	45D02-1003-MF-00538
Clerk New Filing PROCESSED <a href="#">Detail</a> 03/22/2010 23:53		Return Service for Bjonelis	45D01-1003-MF-00505
Clerk New Filing PROCESSED <a href="#">Detail</a> 03/23/2010 09:37		exhibit	45D02-1003-MF-00538
Clerk New Filing PROCESSED <a href="#">Detail</a> 03/23/2010 13:04		Affadavit	45D05-1003-MF-00576

## Location Overview (Supervisors Only)

1. Click the **Location Overview** tab to view **Working Queue** counts by location. The screen shows the number of events in each individual **Working Queue** by location. The location that is in darker blue is the one whose numbers are displayed.
2. To see the numbers for a different location, click on the location name at the top of the screen; the system displays that location's queue counts.

Return To Working Queue			
Cases	Filings	Court	
19	17	0	
<b>Crown Point</b>			
3	5	0	
<b>Hammond</b>			
0	2	0	
<b>East Chicago</b>			
0	8	0	
<b>Gary</b>			
Work Queue	Cases	Filings	Court
Wanda Leggett	2	2	0
Laura Bacino	0	0	0
Dracica Alavanja	2	2	0
Kathleen Arthur	2	3	0
Maria Augustine	0	0	0
Sharon Drain	0	0	0
Lois Fassoth	0	0	0
Kellie Finlon	0	0	0
Kara Hunter	0	0	0
Kathleen Kaniuk	0	0	0
Angela Karas	0	0	0
Megan Manley	0	0	0
Laura Moreland	0	0	0
Paula Perry	0	0	0
Deborah Potter	3	2	0
Shannon Seitzinger	3	1	0
Sharon Shamel	2	2	0
Ola Smith	2	2	0
Pamela Nauracy	3	3	0