Judicial Branch Version Upgrade User Training Session #1

Judicial Branch of the U.S. Virgin Islands

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0:00:00 um so again thank everybody for um joining i'm gonna start the presentation we are recording one please keep your mics on mute until the end of the presentation and um what you're seeing on your screen as we begin is what your e-file is going to look like going forward so the e-file public portal has now been combined and is now the judiciary of the virgin islands sea track public portal. So although it's named public portal, this is where you will be doing your e-filings, electronic filings from. So it will serve a dual purpose. It's going to be available to the public so they don't have to register. They don't have to log in. They literally could just use this as a search mechanism if they want to search for something, which is what we used it for in our old public portal version. But if you are an attorney, if you are a support staff, if you are working, even if you're a private practice, but you're just yourself in your firm, anybody that needs to register or log into eFile, you must log in on this version of the system. We will provide the website and all of that going forward, at least by November 8.

0:01:24 There was a subset of attorneys and staff that were able to help us test our public portal configuration when we were testing back in August. And I thank you if you were one of those people and one of those firms. We thank you guys for helping us with that. But for the most part, the testing is over um the court is currently testing um just a version that we receive or deployment that we received like last this week but for the most part the attorneys and your staff you can't just go on testing right now um so you know unfortunately this is it what you're seeing is what you're gonna have to um remember or what you could do is when we put the um videos onto the YouTube channel, you could go there before November 8th and kind of give yourself a little familiarity with the system before November 8th through 12th. This is what it's going to look like. The public portal and the e-filing is going to be on one login. If you are using it just as a public user, I could go in and I'm just going to start showing you what it looks like on the basic level. So on a public user, non-attorney, non-support staff, you know, somebody that's just wanting to find records at the Superior or Supreme Court, this is what their search parameter is going to look like. It's on your left-hand side. The tabs are pretty basic, and then they would choose what they want to look for. So they would do the same thing that we did the last time. You choose your court. If you know all of this information, you can type it in. If you don't,

0:03:13 then it would give you some options to just go ahead and skip. As you can see, nothing here has that asterisk that we used to have. Nothing really has an asterisk next to it, so it's not required. So in this version, I just wanted to point out that the

exclude closed cases is going to default check. So please, even if you are going to search on the public site and you want to do it not logged in, just remember that everything that you're searching for is going to default as exclude closed cases. So if you don't want to exclude closed cases, then you could uncheck this.

0:04:00 So this is the basic search. A person just going in, they want to see this case, and then they'll see all of the information related to the case. We have some sub-bundles when they get on, basically the case summary. You look at the parties, they'll see if a hearing is coming up or not, and then there's a list of the docket entries. So this is basic. This is the the public looking they don't have a case number they could search by different case categories and and stuff like that so um i'll go home the the dashboard that you're gonna see when you're going to um public portal this is how it's going to look uh we're gonna use this area for announcements so if we're gonna be shutting down or doing anything um at the judiciary we would use this area for announcements so this is going to be crucial for you to try to um you know don't don't pass it over if you see something on the dashboard don't pass this um without looking at it to see if there is something that is being announced um this bundle or this little tile is going to be most important for everyone come november 12th because no matter if you are in our system already or not. And I know this is painstaking for all the attorneys and the users, but you must register again for the public portal website. When you register, we are going to try to pull your information in from your last user profile. But for the most part, every single

0:05:49 person that needs to use the e-filing system must register. You have to register again. I know we're going to get some e-file help desk inquiries that says, I was already a user. I was already an attorney. I was already a support staff. You still have to register. It's not only for you, but also myself as clerk of court or any of my users at the Superior Court or Attorney Handies users at the Supreme Court, we had to register again. Everybody has to get a clean slate, register, and then anything that was affiliated with you in our current system should transfer over. It won't just disappear, but for the most part, you will be registering again.

0:06:39 I just wanted to point out, of course, the new layout. This is something new because it's combine. When you register, I'm going to show you. I'm registered already, but I am going to walk through the registration with you just so that we could walk through it together and you understand what you're going to do. All your users must register. However, I'm going to reach a point in the presentation where your legal org administrator is going to have to basically build your legal organization in the system. And I'm going to show you that, but I just wanted to point out for those people who serve as your legal org administrators, and those may be your office managers, those may be your, you know, whatever terms you use in your office for the person that helps with management of your cases, that person is going to be responsible for creating your users, the attorneys, and basically meshing everyone together. It is not going to be on the court. It is not the court's responsibility to determine who is in your firm or in your legal organization. So let's walk through. I'm just going to register. Like I said, you may see some stuff pop up, but I am going to try to register as a new user. First, we're going to register as an attorney. And then I'm going to register as a legal org administrator for a firm. And then anybody that registers as a regular user, meaning you're just support staff or you're simply, you know, a secretary or admin person in your office, then you just register as is. So let's walk through

0:08:26 the registration process. I am going to do something new so that it's not pulling from what I had before. All right, so just one thing that I wanted to point out, and I know those people who tested for us had a lot of questions as it related to, um, sending a verification code. That is the only way that you could get into the system. It must send you a verification code by phone. I know that there are some, um, concerns about, you know, a staff member feels like they don't want to use their cell phone. You're not using your cell phone for anything else except for getting the verification code, just like you do, and maybe some banking or anything else that you use.

0:09:58 So I'm gonna open my email. Okay, here we go. So the email address that you're using for the first time, that is where you'll get it first. And your first verification, that is going to be in your email. So you have to look in your email address, whatever email address that you're using, that is what you're going to use to look for that code.

0:10:30 And then we're going to go ahead and create our passwords. Save password here. OK, so this is what you would see after you got your email, which are your verification code you're going to create your passwords you're going to enter your name as you want it to appear on your profile and then you're going to create you must enter a phone number i i know this is you know something that everybody may have an issue with but we must do a multi-factor authentication we've asked our vendor to see if we could bypass this and we cannot but i will show you some tricks as we go along to show you that you don't have to use it each time you um log in so let me just get it from my phone so i am authenticated i am now in the system um So my email address that I use only, you know, have that one, that first initial code that was sent. Everything else is going to be configured by you. So this is what you're going to see. You're an attorney. You're setting up your account for the first time in CTRAC Public Portal.

0:12:24 as you can see my name showed up as attorney tester because that's what that's the name that i put and then i'm going to save that information um just so that we could finish setting up um our account so in the user type i just wanted to point out that if you are an attorney you select attorney if you are going to be the um organization um administrator your legal org person then you go ahead and choose that. If you're none of those, please just skip the step. You don't have to do anything else because once your legal org person sets up their account, they're going to have to set you up to relate you to the firm. So the two key players in the firm when you're beginning is the attorney and the organization administrator. But for this record, it is an attorney record.

0:13:17 We're going to go ahead and fill out your information. Most times you use your work mailing address. I know most of you have my phone number already anyway. So we're going to put in your bar ID. Make sure, because this is a required field, please make sure that you are using the bar ID. This is also going to be required just so you know that we are going to have a form.

0:13:50 So for most of you who were around when we first implemented, we had what was called a legal org admin form. We're going to kind of change that up a bit and it's going to be like a user access form. And that is what you're going to attach here in the setup area. That form will include, if you are the legal org and you are acting on behalf of a firm, then that attorneys, or if it's on behalf of one attorney or multiple, you will have to at least put one of the bar IDs on that form as well. So we're going to do...

0:14:29 test documents all right so we're gonna use the test document and submit our request to the court so the next step after you're finished with at least this preliminary step of um creating your profile the next step is to submit an official request to the court um we suspect that the first week of go live which is you know that week of the 11th we are going to be monitoring the emails and we are going to make sure that you're accepted um timely so we're going to submit that request from attorney tester um and then i just wanted to show you on the court side this is how it will look um the court clerk or our designated person is going to receive this request and then we're going to accept you in to the system.

0:15:55 Okay, so this is where your merging will happen. If the person that's accepting you in accepts you with your correct record and make sure that, you know, you do have the bar ID matched up with what you registered with, they will choose this record and then we would accept you in. it's going to be a seamless process. We're not hoping, hoping we're not going to take too long to, um, I did this yesterday. So this is telling me that I can't associate you again, because I did an attorney record yesterday. I'm just going to do a new record.

0:16:35 So for the most part, the attorneys will only one time need to be, um, attached to your submission request so that's what's going to happen if you're new and you've never been in the system we're going to basically fill out this information the bar admissions office is probably going to assist us with this to make sure that that information is being captured correctly with your bar id number all right so this is a course and you've already been accepted if i go back to your um record i will have this is a this is just a fyi when you submit your request what you should do is log out and log back in that is the refresh that is not going to need to be done all the time this is only to get you in and for your profile to be updated so i'm going to do that step just so you kind of see that it's nothing too strenuous you don't have to do it um a thousand times after that um when i log out yes i do have to put in the code so that i could log back in but after that that should be it and this is just initial setup so everyone knows um so i am logged back in and my tabs look a little different um now i have like a work tab and i have a create tab this isn't um available to the public user this is um just available to somebody who's registered so i'm gonna walk through your profile tab the

0:18:25 first thing that you should do um even if you had skipped that step that i did which was log out and log back in i asked that you please go through your tabs in your profile so what i did was i clicked on my name in the upper right hand side i clicked on profile and it got me these tabs so i want to make sure that my login account is correct username email address password anything that needs to be changed i could do it here i want to make sure that my name appears correctly if it's not then i need to you know fix it and then save it um your preferences you know if you're if you're an attorney that only files in superior court and you want to make a preference and default your court you could do that if you don't want to do this step as you can see it's not required it does not have an asterisk so you don't have to select a default court um your address just make sure that the address is you know showing as it needs to it defaults to your mailing address if you need to make a change in any of these tabs please select save so that the changes are saved um this is my you know contact card so to speak and if i wanted to add uh email address to carbon copy and i know a lot of you are familiar with um you know when we told you at the beginning okay well if you wanted to go to you and then you wanted to also go to your secretary you could put your secretary's um email address here if if you wanted them to be kind of carbon copied um and if you don't you don't necessarily have to do that and i basically just added you know an additional email address

0:20:14 if you if you don't want to do that you don't have to do that um your payment method um you know you could add a default payment method and i'm gonna go through this one i'm doing the legal org person, because I know most times it's not the attorney themselves that's doing it. But if you are a firm or attorney that works solely in your office by yourself, then join the legal org portion of the presentation. You'll see how to add a default payment method. And what this will be used for is that once your legal org, and we look at it as an umbrella, if your legal org is set up correctly and then your users who is under your firm, if everybody is using the right login, they don't have to keep entering a payment method. So what's gone away in this version is your add to cart. That portion, basically, if you do a default method, you don't have to keep putting in a credit card number. Now, be mindful that if you do do a default payment method and something changes or your credit card is you know compromised or something and you need to change that you must come back into this area to make the changes um so by the time we add a payment method there will be there will be a opportunity for you to edit if you need to um this tab is our calendar subscriptions this is not going to be available right now in this version of the upgrade it may be available early next year so we're going to skip over that because we don't want to confuse you but it is going to be an opportunity for you to subscribe to the calendars for your cases and

0:22:01 that way it shows up in your calendar um as like reminders but for the most part this isn't available right now so we're going to skip that when it is available and we have to send instructions out then we're going to do that all right this is key notification preferences so you have just your regular preferences which is your language you know your your locale your default court all of that but your notification preferences is key and i ask that if you don't do anything else when you get into the system at first and you log out and log back in if you don't do anything else on this tab screen, please choose your notification preferences. This application means you need to get notifications from our application, which is the CMS CTRAC system that the courts operate from. If this is not selected, as you can see, because I should have gotten a notification when I got approved, but if this is not selected and I intentionally didn't do it so you could see that i didn't select application preference and where's my own notification you know you guys begin to call hey i i you know signed up i didn't get the email i didn't get the phone call i didn't get the and this would be your reason if you do not select and i would suggest just select everything because you want to see if you're filing got a notification for received if you don't want received but you only want approved then deselect receive if you want only um you know if your submission request was accepted but not rejected then you deselect but my suggestion would be select everything and then as you see and you begin to get a little frustrated with oh i don't

0:23:53 need to receive notifications i only need the approvals then you may want to come back in here and um adjust it but in the beginning because this is new not only for you but it's new for us i would suggest that you select everything in your preferences you want to get emails and you also want to get application emails or application notifications or email means just your email address that you signed up with that's where you're going to get your notifications or you're going to get it through the app which this is considered the application um somebody is not muted let's see cheryl could you just do mute all attendees please um so for the most part if you only had emails selected and i went to my email address i should have gotten something that says approved um but you know emails are just that it's gonna be email but if you choose the application notifications you save that you're good to go everything this would be this would be your bible right now this would be where you would go and see everything that's happening on the cmsn as well as your um public portal um and so because that was not selected when i did the user update i did not get the notification by app um if it was selected i would see a notification here that said you were approved by i don't know what the language is on it but i would have gotten the notification at that time okay so key things now everybody can see that my register um tile is gone because i i'm registered i no longer need that register

0:25:46 tab on my dashboard. The tabs on the side, on your further left-hand side is your home tab. Any announcement that the courts would have would be here. Hopefully you get, you know, like a number next to it. Once we have a new announcement, the same would apply with your notifications. You'll get a number next to it. If you wanted to search for any type of filings, case search is the same thing that i showed before it's a party citation you it's basically the same thing that was on the public side um prior your work queue this is going to be important so your work little briefcase queue is going to be anything that you filed so anything that either you yourself file or somebody filed on behalf of you it's going to be in the filings tab the cases it's going to show here as part of your caseload any hearings that you have coming up um and this says subscribe but um this is really for like the calendar subscription that we don't have but the hearings itself should appear here despite you um being like subscribed or subscribed to it or not um we do have the capability and i'm going to try to show that we do have the capability to serve you through the system. I know everybody's been waiting for this and waiting to make sure that, trust me, the clerks have been waiting for this too. And I feel like we're going to have a party once we know that it works. But we are able now to serve you from our CMS system and show proof on our docket side of the system. We are able to see that we could serve you through a new method called public portal service. And once you receive that in your

0:27:36 e-service receive queue and you read it, we are going to see it on our end. So just a little FYI, you may not be able to say you didn't receive something anymore if we default all of our attorney filings and orders and all of that to e-service received. Your receipts are going to be here. Anything that you pay for or someone filing on your behalf pays for, this is going to eventually be a very long list. The same with your hearings, same with your filing, same with your cases, but you would have the opportunity to filter if you needed to. So if it was something really far away and you wanted to see something in the last you know year six months three months then you definitely have the um the options to choose your transaction date and every every one of these tabs will have like a filter opportunity so you could filter here would be where you request case access or you do a new filing if i wanted to request case access which by the time you're merged meaning your profile is merged from the current system to present you shouldn't necessarily need to request the case access but if you had to this is what you would do you would just fill out your information here and then you're going to put in the all right we're not going to do this this is for public we're not going to do that All right. So this is the key filings tab where it says new filing. We're going to do create a filing. You choose your court, just like you did before, whatever court you're filing in.

0:29:30 And then you're going to choose either you're creating a new case or filing on an existing case. The e-filing portion of it hasn't changed much, but I am going to try to just file on a case so we could see that real quick. We have two options.

0:29:58 It's going to have a guided entry, which the guided entry, we are going to configure this um screen to kind of give you a step by step as to um what your steps are to be honest most of you are um proficient in the system so i i think you you should be able to just put in the case number and then do the manual entry so we'll do it that way the guided entry though is going to be helpful for anybody who is new to the system or who have not used the system before so i'm for the most part just going to choose manual entry and once that comes up you get your same options as you got before you choose you you could type motion and then you go down to your list of motions that you want to file and then you're going to create your filing it tells you that you don't have to add parties the key in this system as well or this this version is going to be very helpful for you to read anything that pops up so if something pops up and you think you need to skip over it don't just read it first i mean as you start to use the system a little more or the version a little more it is going to be you know if you're going to be able to skip but for the most part this is telling you that the party the case that you're filing on already has parties so you should not be adding a party you should be skipping this step because it is an existing case so we're going to just file on behalf of we're filing our motions this this exclude from service I I this should only be used in instances and I know we have

0:32:02 this in our current e-filing and a lot of you um kind of misuse it but the exclude from service really should be if you want to exclude your opposed your opposing counsel from the service automatically. If it's, let's say, a document that you're filing only for the judge to review, you know, you guys are attorneys, you know what kind of filings those would be. But everything else that should be served through the system to your opposing counsels, you should not do exclude from service. That's why this is not defaulted as a checkbox. You should always leave this unchecked because your other person is not going to be served.

0:32:55 So in the current version, you have an option to add associated filing. In this version, it's now called add docket entry. So if I'm on this screen and I want to file my motion, my exhibit, my proposed order. I'm not going to pass this. This is very crucial. I'm still on the docket entry screen. I want to file additional things within my motion because it's to be filed together.

0:33:24 Then you should choose add docket entry. If you skip it, then it takes you back to filing. You're going to then have to file your exhibit separately, your proposed order separately. And I know that's a pain for you. i i don't think you want to do that so let's do our proposed order same thing with apply i'm gonna attach my document and it could be a word document as well just so you guys know and then same thing i want to create my exhibit i'm doing everything in one filing and i'm just attaching my documents um just so you are also aware um the ad associated docket entry issue that we faced before which was like a size limit and you guys got hung up a lot on you know it wouldn't add so you had to come out and add again um the vendor is promising us that this should not happen um we are going to um pray that it has been resolved some of those concerns that you had with adding the additional documents and it giving you an error we're hoping that just as you could see on my screen here we have all the documents added if there is something that is really voluminous and past our capacity which i think is um a certain size limit then yes you may have to do that separately and the system may prompt you to do that but for the most part you should be able to just file all your um filings so this shows that this attorney was already on the existing case you should not have to add

0:35:11 um somebody else if if you know if the attorneys that are on the case already that are existing they will appear right here there they should be on the listing and then you want to say that you know they're going to be served by public portal e-service And then we're going to submit the filing to the court. Just FYI everyone saw that that motion was not a

document or a docket that required payment so that was the reason that payment did not show up. Our vendor is in the process of making sure all of our filing fees are updated and added to our configuration. But if you start in November and there is a hiccup and you notice something isn't right, then please submit your information to the e-file help desk. So my filing is done.

0:36:10 This is a summary of it. It says submitted. This is just a little history of the filing. It gives you a reference number, but automatically it showed up that my notifications showed a submission and then the submission was received by the court. And I could just show you quickly what that looks like. Well, on the court side, it would be received. And then when it's approved, you would get a notification again. If these become too much, meaning you don't want to see the received, because I know a lot of you did request that you don't want to see when it was received by the court, your priority is to know that it was approved, then you would go back your preferences which is in your profile you would go right back to your preferences right here and then you would say filing receive notification will take that off so that any received ones you wouldn't receive all right so that's the attorney pretty simple you're just gonna file or someone is gonna file on behalf of you so let us log out and we're going to create a registration for a here we're going to create a registration for a legal org person and i'm using this plus sign i don't know if a lot of you are aware that if you use your main email address and you add a plus sign to it and then the extension that is after that as you can see in my like pre-populated information I kind of use the same email

0:37:58 address but I did one for an attorney LOA support staff those things are things that you could add after the plus sign and I don't know that you would need it but if you do want to kind of keep everything channeled to one email address this is probably a good way to do it um so that everything is coming into my gmail but it's gonna be kind of um differentiated by the um extension after we go to work admin did i already have one of those created let's do loa training all right so i'm going to send a verification and as you can see it will go to that same gmail address that i had um so this is now for our loa which is our legal org admin um you're gonna get it and whatever email address you identify um for it to go to This is our verification code.

0:39:35 All right, so this is the key player in your firm, your manager, your LOA, your whatever whatever tag you have for this person that's going to set everyone up. So my LOA, I'm the legal org person for firm XYZ. I'm going to go in and say that I am the organization administrator.

0:40:18 I'm using my phone number just because I know that. All right, let's do tests. Okay, so this is the org administrator. You have to put in your organization as whatever you have it in with the bar admissions office. So if you have your Roan and Associates or your Dudley Newman or your Gray Groner, if you have those firms and you know this is how the name is in the system, you have to enter it as such.

0:41:08 So if I just type Roan in, just as an example, I'll let you know that some of this that is brought over is actually like older records. So because you may have like different versions in here, I urge you to please choose the one that is most current. So if you, you know, change your law firm name or you think that it's, you know, one or the other before you associate it and you're not sure, please either check with us or check with Bar Admission's office so that somebody could tell you which legal org to choose. And that is going to be crucial.

0:41:52 I want to, like, really urge you to make sure that you're associating to the right legal organization. All right, so we're going to submit LOA Tester request to the court. This is how it's going to show up. Somebody from the court is going to bring her in. Oh.

0:42:31 so because because i'm doing it like i'm doing courtside and i'm also doing um the presentation on what would be your dashboard or your um you're waiting for the court while you're waiting for the court you should have been going in here and actually making your updates um and then once you're approved um you'll see it show up um after you log out and log back in so i want to point out though for the LOA person as you can see you do have the screen like a non-public user screen you have home you have your announcements your work queue and your create queue but when i log out and log back in, you're going to see the difference as to why, you know, you're able to manage your legal org as the legal org. So, we're going to log back in as LOA.

0:43:44 And like I said, please don't be like turned off by the fact that I'm logging in and out. I'm only doing that to set us up. After you're set up and after you've been using the system and you have the system up, you really won't need to do a lot of log in, log out, and get your authentication code. But now that I am officially set up as a legal org admin person, I am now able, if everyone noticed, I now have a manage organization button. This is going to be crucial. If you're going to be the LOA or you're the office manager or the primary attorney and you don't see this.

0:44:24 You may not have, one, been accepted by the court yet or approved by the court yet, or you did something wrong on the legal org side of it. But for the most part, if you did everything correctly, you should see a manage organization tab so

that you're now able to add your users and all of that to your organization i want to point out that let's do this okay so i wanted to have you check even though you did not receive the notification i'm logged in i'm LOA tester and i did get the approval but because my notifications were not turned on i was not able to see that however i could check that also by going to my user access tab under my profile and i could see that i am granted access as an organization administrator and a public user um so that kind of you know although you didn't get the notification you're still able to check that on your own and the also the little screen that shows manage organization that should tell you that you are the org administrator so this is your legal org so whatever firm you're in this is what the information would look like your firm name the type of firm the address and then the administrator as far as like who are the administrators in your firm you could have multiple administrators i know the last go around a lot of the firms did use multiple people to be your legal org admins and you can

0:46:12 have multiple legal org admins it's not restricted to um just one so my payment method i am gonna add a payment method here just so that you could see how that looks um i'm just gonna add a test card um that we use So now on the payment method, I have this card that is going to be used for everything in my legal org that is defaulted.

0:46:51 Currently, these are the list of users on my legal org site. And then of course, I'll see my receipts as well. This is going to be key. screen that says and and let's kind of go back through this again so you kind of have the steps that i took because this is going to be very important we're at manage organization and then you're going to go to your users tab in users tab you should see every user that was registered to be associated to your legal organization so if your support staff jane says hey i did not get something from the court, your first step should be to check in your user listing and see, did she do it correctly? Did she submit something to the court? Is she even registered? Because the first step is that the person must be registered as a user. And then you would add all the different things that you need to do to add them to the firm. And that's what we're going to do now. Do not automatically go to add support staff. That's not your first step. Your first step is going to bring in all of your users in your firm, your big, your large firms, like the AG's office, public defender's office, legal service, any big agency or firm. I suggest that you make sure, like literally, if you need to have them send you something from their emails that says, yes, I registered with the court, that's what you should do if you're going to be the legal org person. And this prevents all of the calls to the court, the e-file help desk, because a lot of times it is within the organization that the error occurred. So if

0:48:39 the user has not registered, they will not appear for you to bring them in. So we're going to first add a user we want to add all of my attorneys and add all of my support staff all every everybody that's in my legal organization or my firm or the agency i want to add them um to this um legal org so we're gonna do the attorney that we just use we're going to add that attorney as one of the attorneys in the and I could I could give him him or her payment access and I could make that attorney an administrator as well so this this screen is crucial this is the user information for for the attorney that I'm trying to pull in, this is you allowing this option to provide the user with the ability to make payments in public portal using the payment method associated to this organization. So if this user should not just automatically be able to use the card that's on file, then please don't select that. If the user is not supposed to also be an administrator, you don't have to select that. But I believe in most of your firms, the attorneys also serve as administrators. So that's just, you know, it's based on your preferences on how you want to set up your firm. So now my attorney is added. I have a username, DemoAdmin. I have a username, LOLTester. You know, so I could add as many users that I need to. The key would be to add your attorneys, add your staff. The LOA person is now going to go in and add the support staff

0:50:35 for that attorney. So I have LOA tester and demo admin as my, let's say, support staff people. I'm going to click on the attorney line. So whichever attorney LOA tester is supposed to be filing on behalf of, I want to make sure that I choose that attorney. And then I'm going to say add support staff to attorney tester and it shows you already a list of people that you want to add so if you want to add LOA tester and you want to add the demo admin person that is who will be on behalf able to file on behalf of that attorney so now that that is saved um this person LOA tester and demo admin once they log in they should be able to file on behalf of attorney tester um and to see that change I may have to so here where we didn't have to log out but But you see that this has now changed to on behalf of because LOA tester is now allowed to file on behalf of and not only as LOA tester.

0:51:51 So I could now file on behalf of attorney tester and I could save that. So it tells you you are now working on behalf of another attorney user. Um, and it also shows you here that, you know, LOA tester as attorney tester, because really you're filing on behalf of that attorney. Once you are logged in, I know this is going to be a hallelujah moment for most of you, but once you're logged in, in the right role, right legal org, right attorney association, like you're associated to that attorney that you're supposed to file on behalf of, you should not have an issue seeing that attorney's work, filings, hearings, any of that notifications, anything that comes into that attorney, you should be able to see it. So if I go into my filings, I'm not looking at LOA testers filings. I'm looking at attorney testers filings. So all of the attorney's filings, all of

the attorney's cases should be listed. Any hearing that the attorneys have coming up if the attorney was e-served but did not open it but you went in and you opened it you saw it you didn't tell the attorney then you know i don't know maybe out of a job but if you don't um click on the e-service receive and you you see that it opens that whoever is operating in that capacity opens it on the e-file on the cms side which is the court side we're going to see that you saw it. So if attorney tester comes and says, well, I never saw that email or I never saw that order, you may want to check the people in your office because they have

0:53:39 the opportunity to open your filings. They could see all your service. So it's going to be very crucial. I'll repeat it again, that the LOA, your office manager or your legal org admin, It's going to be crucial how you manage your organization and how you allow your users to kind of maneuver through the org or the firm. And I say that to say anything that you set up, the court has, you know, basically nothing to do with that. You're going to have to try to make sure that everybody is set up.

0:54:14 Everybody could access, you know, be filing on behalf of if I don't want to file on behalf of. And I this list. And of course, I think everybody knows this. This list could be four people. I could have four attorneys. Tamara Charles could be filing on behalf of four attorneys. This this is not limited to just attorney tester, but you've got to set her up. You got to set up this other attorney to make sure that Tamara is under that attorney as well. So if Tamara is supposed to file on behalf of four attorneys, please add her as support staff to four attorneys.

0:54:51 And then she has the ability when she goes and she logs in, you have to switch. I know this is a little painstaking as well. You have to do on behalf of and you have to choose the attorney that you're filing on behalf of. But I think the benefit and the milestone that we've reached right now in C-Track is that you are going to be able to see all of the filings. You shouldn't have to set up that auto forward on your emails and all of that.

0:55:24 You probably still should do it so that when the calendar subscription comes in, I'm not sure if you would need it. but if you don't need it, it would probably apply the same like we have right now, which is on behalf of, and that's how you'll be filing. So for the most part, once your LOA is set up and the LOA brings everybody, so this list may look very long for an agency like attorney general's office or very long for public defender's office or a firm with, you know, five councils, because you're going to have to have all of the attorneys listed as well as your staff. So it could be, you know, this, which is three people, or it could be 10, it could be 20, but you have to associate the people or the players in your organization the right way. So for the most part, this is it. This is the face of it. This is what you'll do on the first day. You'll try to set up your legal org after your legal org is set up then you could create your filings um i would urge you that come november if and it shouldn't be but come november if you're not seeing um you know if i go to do a filing and you're not seeing like in the drop downs you're not seeing some stuff that should be there um just let us know just send us an email because we are working it's a little different on the configuration end so we are working with the vendor to try to make sure that this list is as complete as it needs to be. But I am going to open it for questions right now before i add anything else um to it so let me

0:57:17 this and then we are now open for question oh we got a lot of hands all right let's see let me go to the chat first though um so what if you do not have a bar id because you're especially admitted um i'm not the bar admissions so you don't have a bar d if you're specially admitted um okay so we'll have to make a note of that i'm not sure um what we may be able to give you something because that feel is going to be required so we may have to allow bar admissions to allow you to enter something specific in that field um but that's a good question so i'll note that to bar admissions um okay do we have to re-register as council of record in every case no um once you register for public portal and we i i'm not sure if you saw that step where i went in and And the user access link allowed me to like match you to your current bar ID number that's within our system.

0:58:31 Once that is updated and you are who you were in the old system, you should not have to re-register or like file an appearance or anything of that sort on each case. And then once that happens, just as an FYI, once that happens, you should be able to see a list of your cases here. In the current system, we are experiencing where if you file the notice of appearance, the rules were configured to do something on the back end to allow you to be placed on a case. But that became user intervention.

0:59:08 That became where the clerks needed to do that. And everyone knows that if we depended on humans to do everything, there is going to be room for error. So a lot of times the clerk doesn't manually add you to the case. So if you're one of those attorneys who are consistently having issues with still not seeing your cases or you can't see a case that you filed an appearance on, I would urge you to send me an email. And everyone I think by now knows my email address. I could put it in the chat.

0:59:40 But for the most part, if you are one of those attorneys that were still experiencing issues, I would suggest that you send me an email with a list of cases that are active. Don't give me a list of old cases, a list of active cases that you don't see yourself on or you have issues logging into. and we would make sure that that is done before our go-live to eliminate that issue. Or will our prior parents, okay, so I think I answered that prior parents under the old system be carried forward. Yes, that should be the case. We just asked that, yes, if you are an attorney, I do have a list of attorneys that still experience issues with not being given access to a case.

1:00:29 And if that is the case, just send me. And I say send it to me. It may seem like a lot, but I say send it to me so that I could personally know that I worked on it and that it was updated. We have a few attorneys that did that and it did work after. Can we register before November 12th? Unfortunately not, because what we're using right now is a test system and you can't get into the test system. We're actually like testing right now and the vendor is doing some stuff in the system.

1:01:02 So you can't necessarily register before then. November 12th is like the green light date. But if we get any word from the vendor, let's say November 8th or 9th, I won't say the 8th because 8th is shut down. But if we get any word from the vendor on, let's say, the 9th or 10th, and they say, okay, hey, you know, you guys could go ahead and let people start registering, we will send an email blast from that e-file email. So it's crucial that you look at your emails that comes from the system.

1:01:32 So any system-generated email that says C-Track e-file, it will be important for you to watch those emails around that time because they may give us the green light to have you register maybe, who knows, the 9th or 10th or even 11th. That's a holiday, but we will be working on trying to get the system up. The form that is needed to be completed, is that available now to download? it's not i'm actually working on it and that's a good idea because i was thinking i would get it out before november 8 but that is a good point thank you for raising that because once it's finished we could send that out on the email blast so that you guys could start um you know filling in those forms the form shouldn't be submitted um um like you don't have to submit before you should have it filled out to be submitted in that step that I did which was requesting case access that's where you would you would do it at the time of your registration so although we may give you the form and you're able to fill it out you shouldn't send those in prior to the registration time. Okay Ms. Rollins I see your hand up is there you still had a a question or did I answer your question? She's on mute, but I'm not sure. Is there any other questions regarding the process or the expectation? I would urge you if you have a LOA in your firm Or if you are an attorney that will be doing this step by yourself, meaning you don't have

1:03:23 an LOA, it's just me alone in my office, I don't mind helping you set this up so that it's not haywire. So if you are one of those attorneys who are on your own and you really don't have an LOA to do it for you, you could try. I think it's pretty simple. I think the the screens are pretty user friendly. It's pretty a lot of information. It kind of gives you a lot that you need to do. But if you need our help, I really don't mind assisting you with it so that you could get it set up the right way and then avoid anything going forward.

1:04:02 So, you know, you could just reach out to me if you are going to be one of those attorneys that is going to need help. You could send me a quick email saying, hey, wave of a hand. I may be one of those. And I'll probably just keep your name on a register so that I could either reach out to you to see if you got it done, or we'll try to help you to get that done. But just know that it has to be done on your end. It has to be done in a firm. The court can't really do it for you on our side. It has to be done on your own, but we could help you.

1:04:33 um any other questions anything else that um somebody may have wanted to see but didn't see um for the most part i think at least the feedback that we got from the attorneys who helped us test um it seems a little more user friendly and it feels like the support staff who is your support has a little more leverage within this version of the system.

1:05:08 So I think it's going to work a little better. It should resolve a lot of the errors that we had and a lot of complaints that we had before. But, you know, there's always something with something new. So we're going to just work through it. But for the most part, if you don't have any questions, Ms. Rollins, I'm not sure if your hand is still up or um was it let me see if i missed any other hands no other hands so just miss rollins but maybe she just can't hear me um but i'll i'll reach out to her if maybe she had a question but for the most part um that's it for the demonstration I urge you, if you do have a legal, because the legal org admin or the manager is going to be key in the setup of your firm or your organization.

1:06:03 So that person should attend one of the demos. It's today, again, at 3, and then tomorrow at 10, tomorrow at 3. And it is repeated. Exactly what I went through just now is what I'm going to be repeating at 3 o'clock, as well as tomorrow at 10 and tomorrow at 3. so if there's nothing else thank you everyone um if you have any side questions that you didn't get to ask just send me an email and we'll try to um answer those so timeline november 8 um to around the 11th we'll be kind of refreshing our system if we get any word prior to the 12th to let you start registering, then yes, we will give you some directions around that weekend. I know it's a holiday weekend, but we're going to have to try to do it as much as you

could register early. It's easier because then you get to do your filings. And I know that week we may allow filings through the email up till a certain time because we know that we expect some type of hardship with you trying to register but um after that week um you know it would probably mean that you have to have e-filed your filing so all righty thank you everyone have a good weekend and stay dry You

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