Reference Guide Contents:

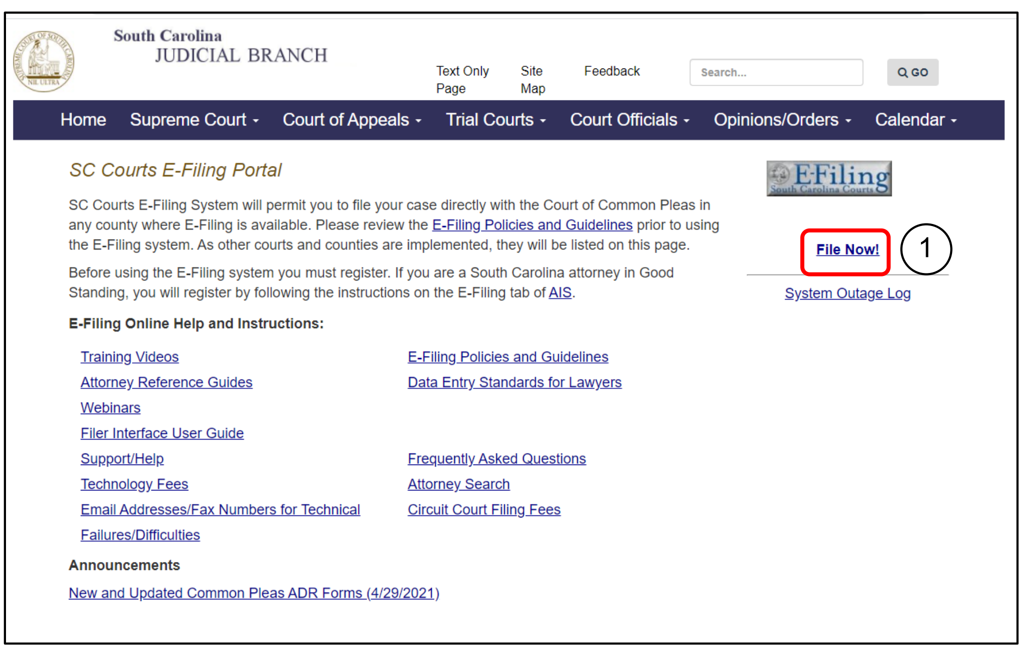
Initiate a Case as a Defense Attorney in E-Filing

There are only <u>three</u> **Case Subtypes** that can be initiated by a defense attorney:

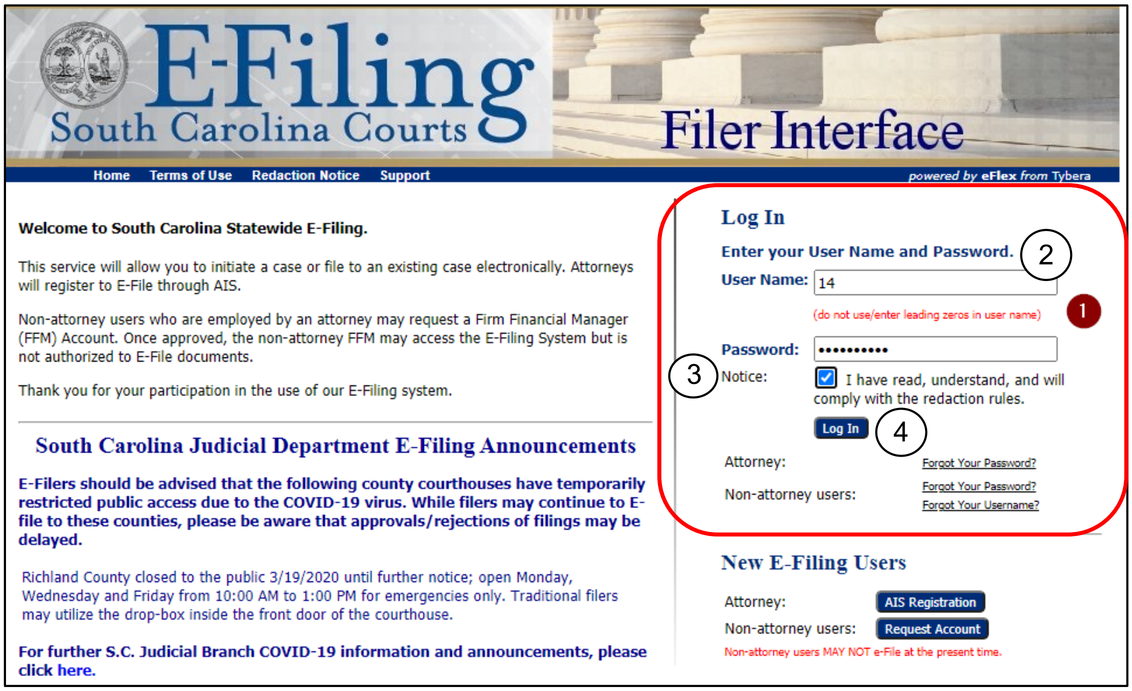
- (700) Death Settlement
- (730) Minor Settlement
- (790) Incap Adult Settlement (Note: "Incap" represents Incapacitated)

Note	You <u>must</u> have the plaintiff attorney's <u>last name</u> and <u>bar number</u> to file.

Logging In to E-Filing



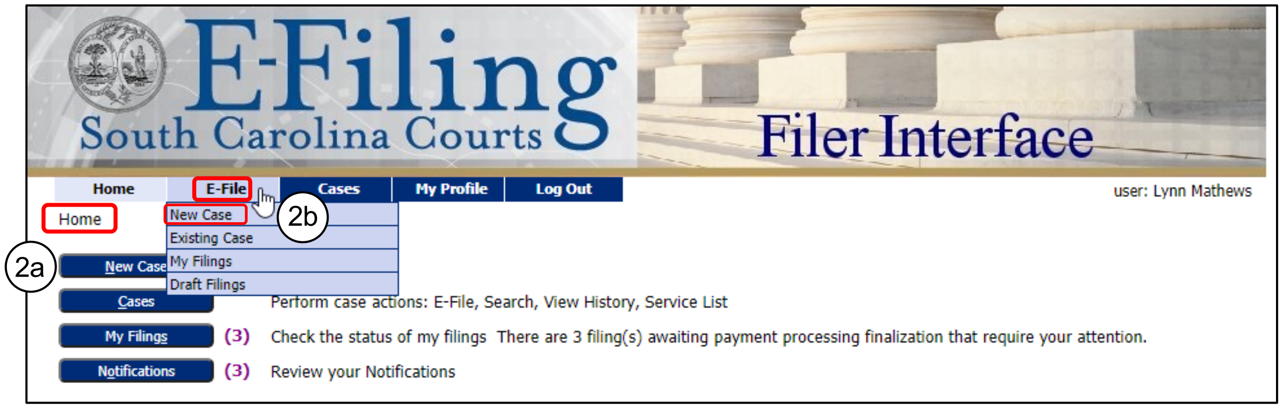
1. From the E-Filing Portal located at http://www.sccourts.org/efiling/, click on **File Now!**



2. Log in using your **User Name** and **Password** from AIS.
3. Click the **Notice** checkbox to indicate you have read, understand and will comply with the redaction rules.
4. Click **Log In** to open the **Filer Interface** home page.

Add a New Case

1. The **Home** page appears.



2. Click the **New Case** button (**2a**) on the **Home** screen or click on **E-File** and choose "*New Case*" (**2b**) from the drop-down menu.

3. The **County** screen appears. Select the **County** (**3a**) where you will be filing and click **Next** (**3b**).

4. The **Case Type** screen (**4a**) appears. Select “Common Pleas” (**4b**).

Please note that initiation of a case by defense counsel can only be done on three **Nature of Actions** (**NOA**s): **(700) Death Settlement**, **(730) Minor Settlement** and **(790) Incap Adult Settlement**.

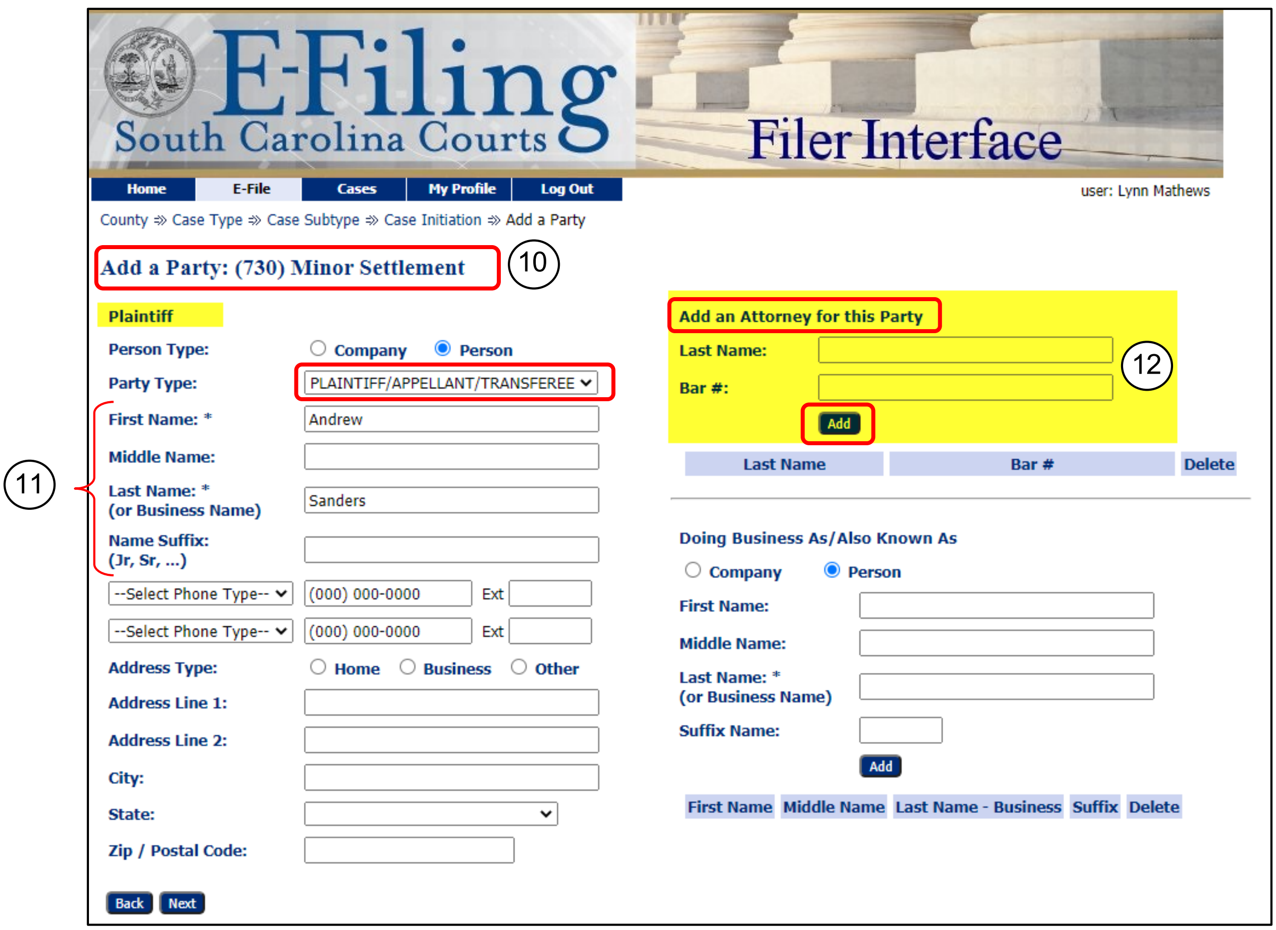
(In this example, a “*Common Pleas (730) Minor Settlement*” will be filed.)

5. The **Case Subtype** screen (**5a**) appears. Click to select the **Case Subtype** which in this example is “(730) Minor Settlement” (**5b**).

6. The **Case Initiation** screen (**6a**) opens for adding a plaintiff and a defendant. The **Add a Plaintiff** and **Add a Defendant** buttons (**6b**) appear greyed out.

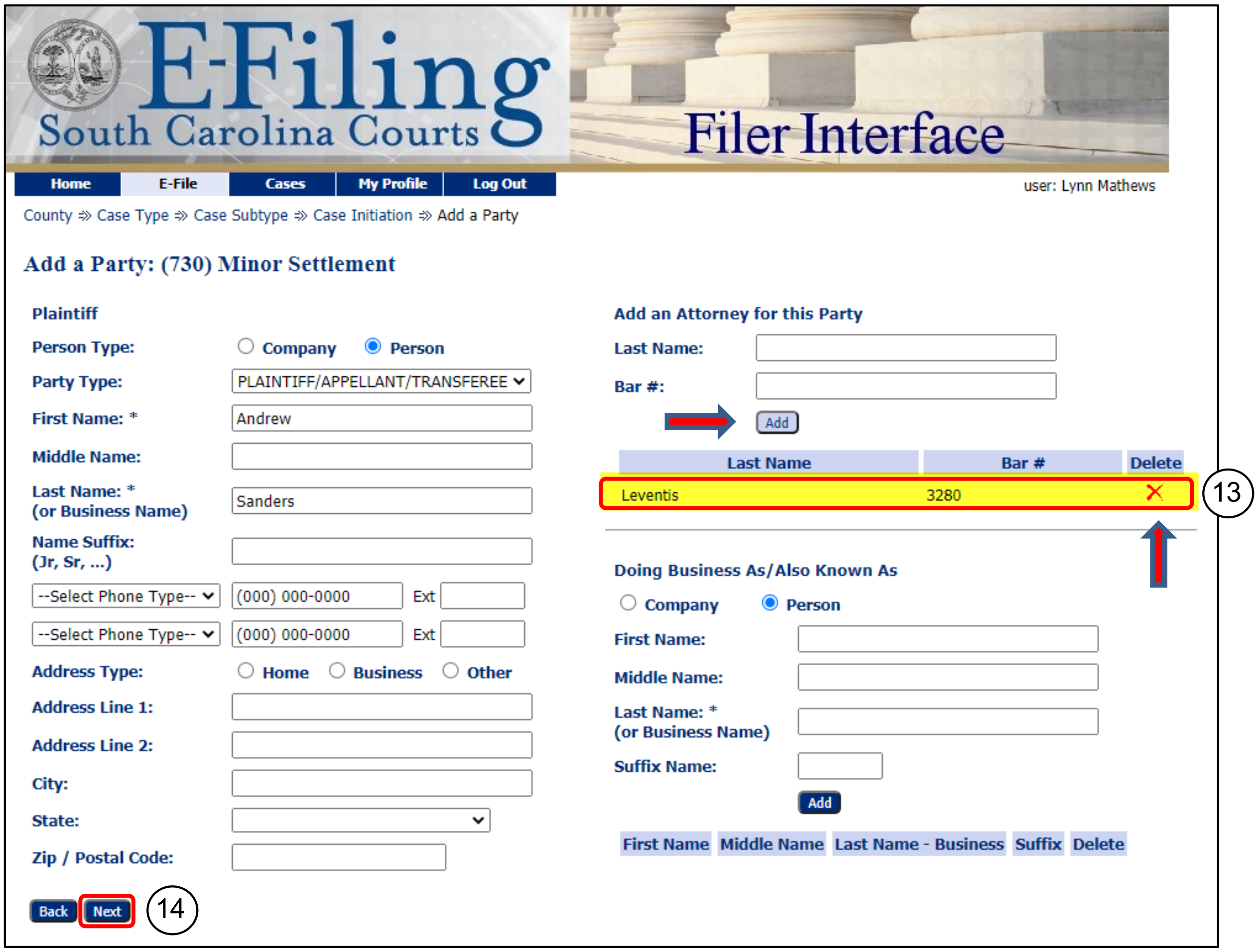
7. Click to select the **Jury Demand** option.
8. Once you mark the **Plaintiff(s)** or **Defendant(s)** radio button (**8a**), the **Add a Plaintiff** and **Add a Defendant** buttons (**8b**) become enabled.

9. To add a plaintiff, mark the **Defendant(s)** radio button (**9a**) and click the **Add a Plaintiff** button (**9b**).



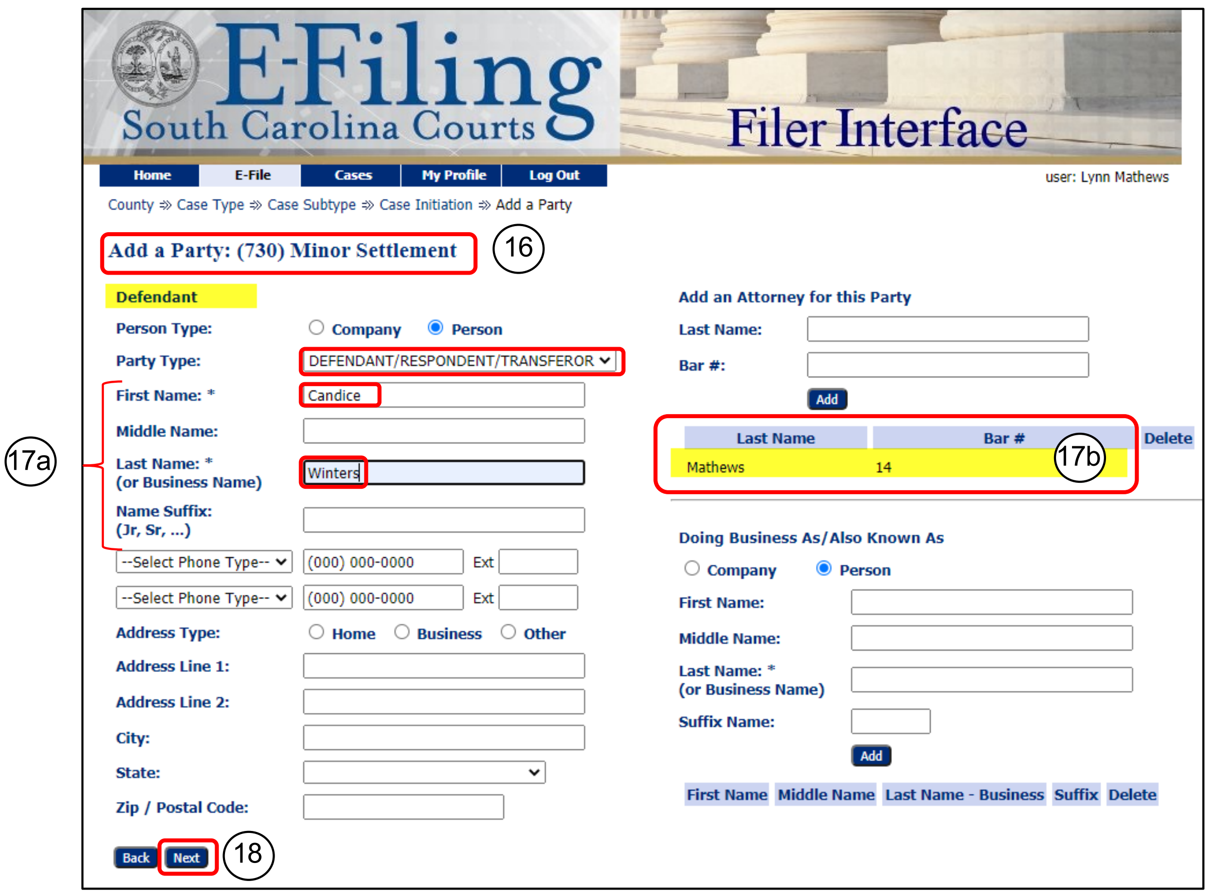
10. The **Add a Party: (730) Minor Settlement** screen appears.

11. Enter the plaintiff's name.
12. When adding the plaintiff to the case, you are required to enter his/her attorney's last name and bar number and click the **Add** button.



13. The attorney name and bar number will appear in a grid below the **Add** button and have a **Delete** option indicated by the red X. Your screen should appear similar to the one above.
14. Click **Next** to proceed.

15. The system returns you to the **Case Initiation** screen. Note the plaintiff's name (**15a**) appears in the grid. Click the **Add a Defendant** button (**15b**) to enter the defendant(s) on the case.

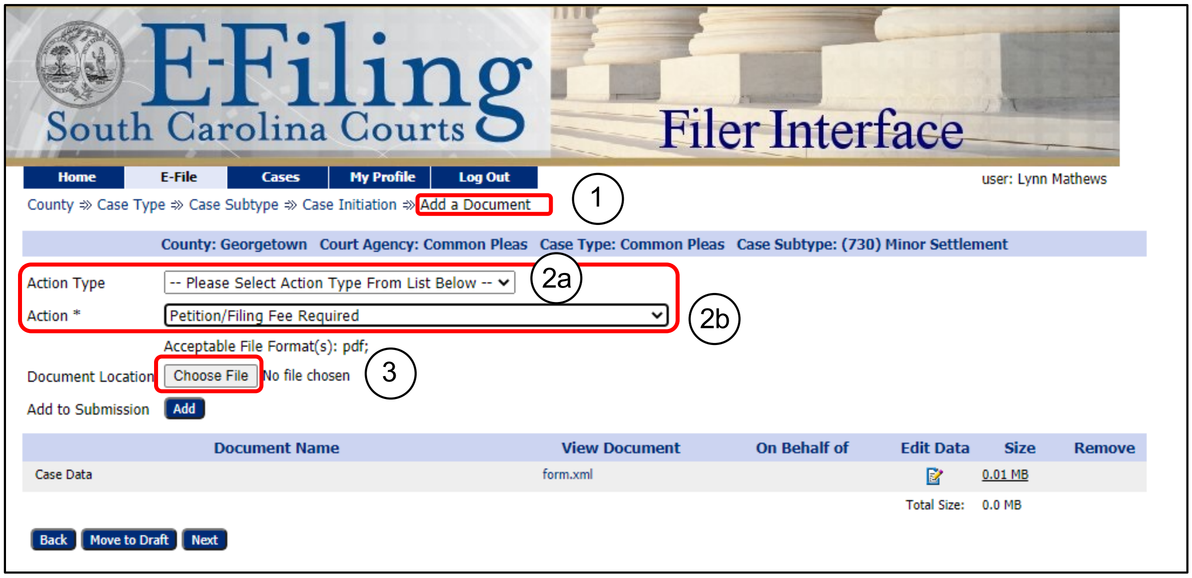


16. The **Add a Party: (730) Minor Settlement** screen appears.

17. Enter the defendant's name (**17a**). Note that <u>your</u> name and bar number (**17b**) will automatically populate the screen.

18. Click **Next**.

Add Documents to the Filing



1. The **Add a Document** screen appears.
2. Choose an **Action Type** of "Filing" or leave the **Action Type** value set to "- - Please Select Action From List Below - -" (**2a**). This will allow <u>all</u> actions to appear in the **Action *** drop-down field.

   Action * "Petition/Filing Fee Required" (**2b**) is required for all three **NOA**'s: **(700) Death Settlement**, **(730) Minor Settlement** and **(790) Incap Adult Settlement**.
3. Click **Browse** or **Choose File** to locate your document.

Note: The **Action Type** field was designed to act as a filter. Leaving it set to "- - Please Select Action From List Below - -" filters the list of **Actions** that appear in the **Action *** drop-down. While this can be helpful, the filter does not clear itself after you add an **Action** (a known issue). If you change the **Action Type**, you may not be able to find the **Action** you need in the drop-down. You will still see what was in the drop-down for the first **Action Type** selected. The way to avoid this issue is to leave the **Action Type** blank or have the "- - Please Select Action From List Below - -" choice selected in the drop-down.

4. Click **Add** (**4a**) and the document (**4b**) will be placed in the grid. (The form.xml (**4c**) file is automatically generated and contains code needed by the E-Filing System.)

5. Select the case party or parties that this document is being filed **On Behalf of** (**5a**). For multiple parties, you can select "All My Parties" (**5b**), and all your case parties are added to this filing.
6. Click **Add** to add the case party name(s).

7. In the example, Candice Winters was selected and appears in the grid with a red X next to her name.
8. Click **Next**.

Payment and Case Status

1. The **Review and Approve Filing** screen appears.
2. Select the name of the person on whose behalf the payment is being made. (In this case, it is Candice Winters.)

3. Click **Submit the Filing** button.