



Auto-Accept Review & Press Review Tool

07/01/2022

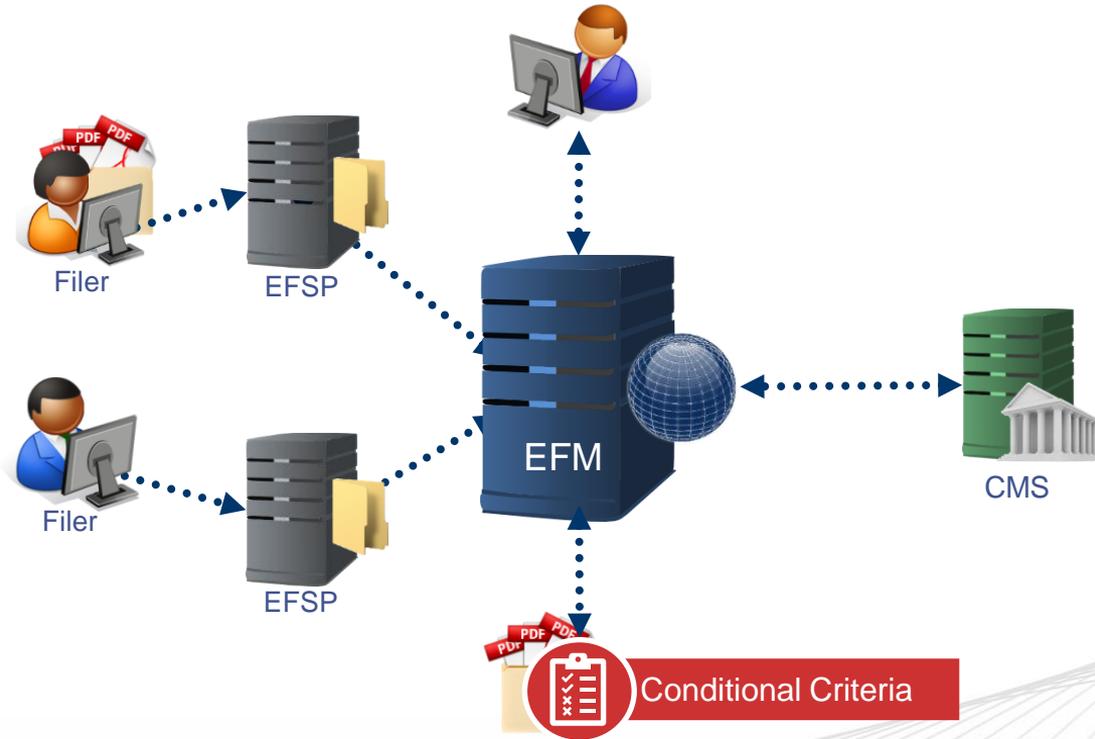
Review Queue													
Envelope #	Case #	Submit Date	Status	Filing Code	Filing Description	Case Title	Case Type	Judge	Filed By	Filing Attorney	Queue	Reviewer	Lock
20414899	5561	10/21/2017 1:21 PM CST	Submitted	Safekeeping Agreement		In the Guardianship of JA... Guardianship - Adult	Munkres, Lynda	Tanya Anderson			Morris County Clerk - Prob...		
20534122	5531	11/06/2017 2:54 PM CST	Submitted	Hearing	Notice Setting Hearing	In the Matter of the Estate... Independent Administration/Munkres, Lynda		Tanya Anderson			Morris County Clerk - Prob...		
20534918	5531	11/06/2017 2:59 PM CST	Submitted	Hearing	Notice Setting Hearing	In the Matter of the Estate... Independent Administration/Munkres, Lynda		Tanya Anderson			Morris County Clerk - Prob...		
20620589	5574	11/09/2017 3:48 PM CST	Submitted	Orders	Order For Creation of Ma...	In the Guardianship of Ms... Guardianship - Adult	Munkres, Lynda	Tanya Anderson			Morris County Clerk - Prob...		
20626579	5574	11/09/2017 3:52 PM CST	Submitted	Orders	Order for Creation of Ma...	In the Guardianship of Ms... Guardianship - Adult	Munkres, Lynda	Tanya Anderson			Morris County Clerk - Prob...		
20733773	JPO5-SC00003321	11/15/2017 12:35 PM CST	Under Review	Affidavit	Acknowledgement of As...	RAMONA MCKAMIE MAR... Small Claims		Valdez, Manuel T.	Darlene Major		Tarrant JP 5 Filings		
20815216	5578	11/20/2017 9:33 AM CST	Submitted	Order Approving Inventory		In the Estate of McKaig, B... Independent Administration/Munkres, Lynda		Tanya Anderson			Morris County Clerk - Prob...		
20847363	17-CCV-060179	11/21/2017 10:17 AM CST	Under Review	Motion on Judgment Proposed Order Designation	SUMMARY JUDGMENT ON Summary Judgment OF ATTORNEY	DISCOVER BANK vs FAIWA... Debt/Contract - Debt Colle... Cohen, Ronald		Tiffany Dixon	JULI MATHEW		Work Item Complete		
20919056	5564	11/27/2017 4:28 PM CST	Submitted	Orders	Order Extending Time to ...	In the Estate of Core, Betty... Letters Testamentary	Munkres, Lynda	Tanya Anderson			Morris County Clerk - Prob...		
21145184	17-CCV-060848	12/07/2017 11:42 AM CST	Under Review	Motion (No Fee)	Motion to Dismiss	Paul Hydo, Terry Hydo vs ... Debt/Contract - Debt Colle... Morales, Christopher G.		Andra Beinhauer	David Hill Bradley		Work Item Complete		
21550140	5564	01/02/2018 1:00 PM CST	Submitted	Orders	Order Extending JAC	In the Estate of Core, Betty... Letters Testamentary	Munkres, Lynda	Tanya Anderson			Morris County Clerk - Prob...		
21619110	5569	01/04/2018 4:41 PM CST	Submitted	Order Approving Inventory		In the Estate of Williams... Independent Administration/Munkres, Lynda		Tanya Anderson			Morris County Clerk - Prob...		
21885161	5564	01/18/2018 8:45 AM CST	Submitted	Order Approving Inventory		In the Estate of Core, Betty... Letters Testamentary	Munkres, Lynda	Tanya Anderson			Morris County Clerk - Prob...		
21924203	5594	01/19/2018 10:40 AM CST	Submitted	Orders	Order Appointing Attorne...	In the Guardianship of Litt... Guardianship - Adult	Munkres, Lynda	Tanya Anderson			Morris County Clerk - Prob...		
21924401	5594	01/19/2018 10:42 AM CST	Submitted	Orders	Order Approving Private ...	In the Guardianship of Litt... Guardianship - Adult	Munkres, Lynda	Tanya Anderson			Morris County Clerk - Prob...		
21975780	117-00297-FED	01/22/2018 2:42 PM MST	Error	Answer	Defendant's original Ans...	Richard Dillon vs ELANE... Eviction		Pearson, Robert T	Mario A. Gonzalez	Mario A. Gonzalez	Court Errors	Deborah Barron	
22064997	CA	01/25/2018 2:22 PM CST	Submitted	Notice		State of Texas VS GUTIER... Misdemeanor	Unknown, Other	DUSTIN FANNINGS			Default		
22075971	15F0850-202	01/25/2018 4:40 PM CST	Under Review	Proposed Order	Order on Mot to Modify T...	STATE OF TEXASVS ROBY... Felony		Tidwell, John L.	Michael D Peek	Michael D Peek	BOWIE DC - 202 HOLDING...		
22078685	15F0850-202	01/25/2018 5:44 PM CST	Under Review	Proposed Order	Proposed Order on Mot L...	STATE OF TEXASVS ROBY... Felony		Tidwell, John L.	Michael D Peek	Michael D Peek	Bowie DC - 202nd Holding		

eFiling function that allows clerks to automatically accept filings if the filing matches locally-configured criteria (conditions)

Conditions can be configured based upon:

- Filing Firms
- Filing Codes
- Filings with/without Financials
- Filing Source (EFSP)
- Additional Services
- Judicial Officers
- Party Types
- And more...

Auto-Accept Review – How Does It Work?



1. Upon submission, filings are evaluated against the locally-configured Auto-Review condition(s)
2. If the envelope details do not meet the Auto-Review condition(s), the envelope is routed to the appropriate review queue to be reviewed by clerk (as it is today)
3. If the envelope details meets the Auto-Review condition(s), the filings are automatically accepted, stamped, funds captured, and notifications sent to filers/service recipients



Improves Average Response Time

Automatically accepting common, low priority filings allow Clerks to focus on more complex, high priority filings, and respond to filers faster



Reduces Return for Correction Rates

Many Courts' effectiveness are measured by the percentage of accepted filings, auto acceptance improves these metrics



Reduces Operational Overhead

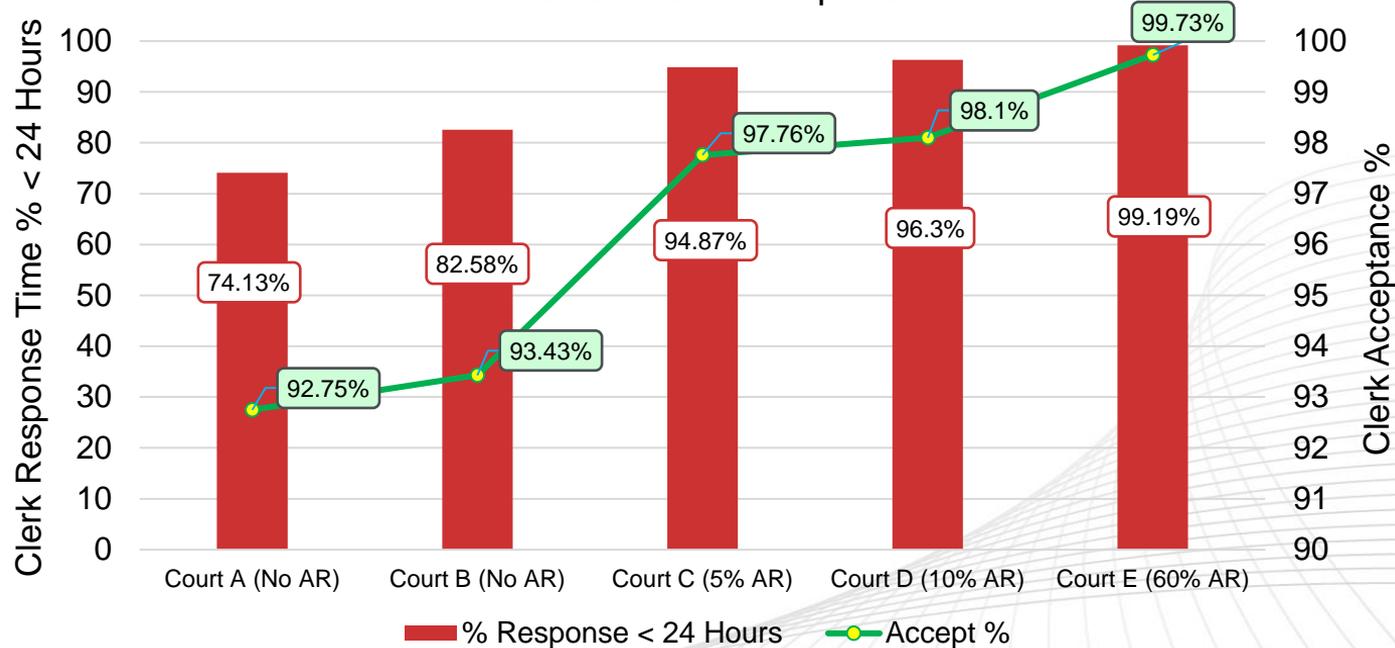
Auto acceptance removes the need for Clerk intervention, instantly increasing an office's reviewing capacity

The Effectiveness of Auto-Review

Summary

- **Courts A and B** use no auto-acceptance criteria
- **Court E's** Auto-Accept Review criteria automatically accepts ~60% of filings
- **Courts C and D's** marginal usage (5-10% of filings auto accepted) provides noticeable impact

Reviewer Trend Comparison



*Example data utilizing Q4 2019 reviewer metrics

**AR = Auto Review

The AR % is based on number of reviewable filings submitted vs. number of filings auto reviewed

Auto-Accept Review - How To Get Started?

Determine Business Needs

- ❖ Start with simple filing scenarios with high probability of acceptance
- ❖ Common scenarios:
 - Filings from Gov. Agencies or specialized Firms (e.g. Linebarger)
 - Subsequent, no fee filings

Design Auto Accept Criteria

- ❖ Auto Review conditions commonly include a combination of:
 - Case Category
 - Case Type
 - Filing Code
 - Filing Firm
 - Optional Services
 - Document Type
 - Payment Type
- ❖ Auto Review feature is configurable by node/court location

Submit eSolutions Support Ticket

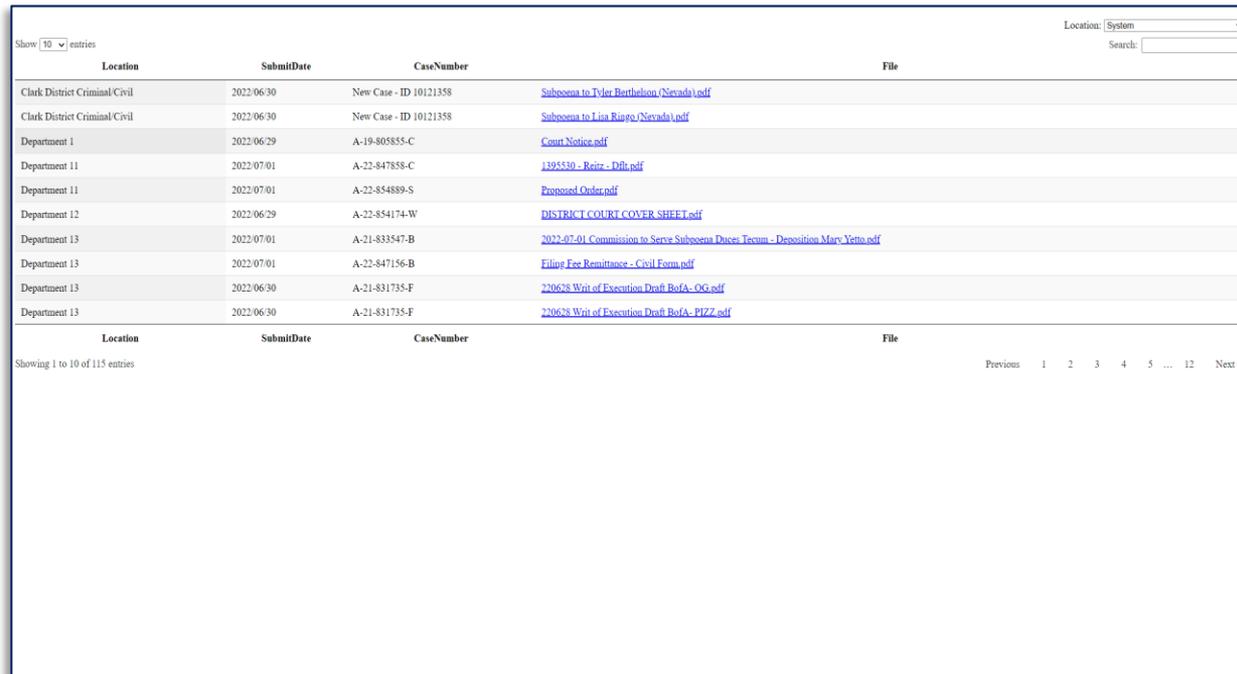
- ❖ Allow 2-3 business weeks for setup, testing, and promotion to production
- ❖ More complex conditions may take longer
- ❖ Consultation appointment can be scheduled via Support, or contact out to eSolutions CSAM

Solution that allows clerks to make e-Filed materials immediately available to the press and other authorized stakeholders

Records can be made available based upon:

- Case Type Codes
- Number of Days
- Filing States (Statuses)
- Security Groups
- Document Types

Statewide standard (baseline) configuration defined by the OCA

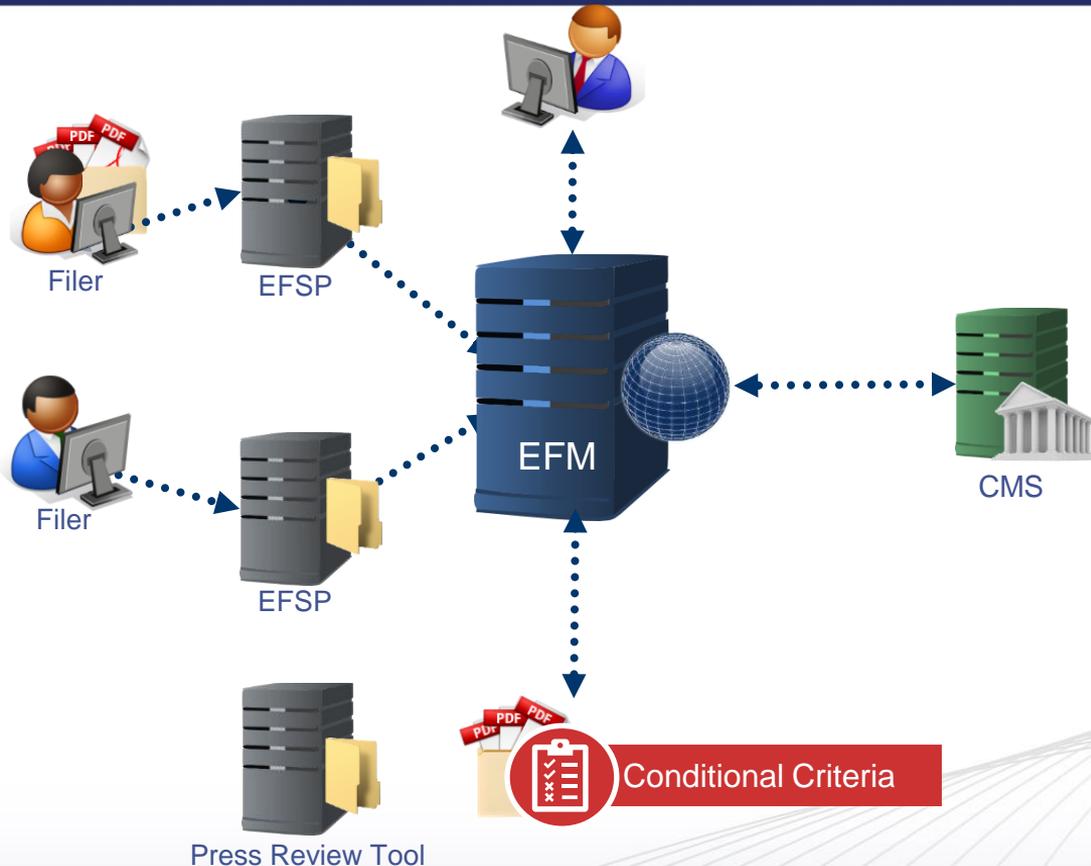


Location	SubmitDate	CaseNumber	File
Clark District Criminal/Civil	2022/06/30	New Case - ID 10121358	Subpoena to Tyler Bartelison /Nevada /pdf
Clark District Criminal/Civil	2022/06/30	New Case - ID 10121358	Subpoena to Lia Riang /Nevada /pdf
Department 1	2022/06/29	A-19-805855-C	Court Notice.pdf
Department 11	2022/07/01	A-22-847858-C	1395530 - Reitz - Dfll.pdf
Department 11	2022/07/01	A-22-854889-S	Proposed Order.pdf
Department 12	2022/06/29	A-22-854174-W	DISTRICT COURT COVER SHEET.pdf
Department 13	2022/07/01	A-21-833547-B	2022-07-01 Commission to Serve Subpoena Duces Tecum - Deposition Mary Yerio.pdf
Department 13	2022/07/01	A-22-847156-B	Filing Fee Remittance - Civil Form.pdf
Department 13	2022/06/30	A-21-831735-F	220628 Writ of Execution Draft BoFA- OG.pdf
Department 13	2022/06/30	A-21-831735-F	220628 Writ of Execution Draft BoFA- PIZZ.pdf

Showing 1 to 10 of 115 entries

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Press Review Tool – How Does It Work?



1. Upon submission, filings are evaluated against the Press Review condition(s)
2. If the envelope details meet the Press Review conditions, the envelope data and document are surfaced in the Press Review Tool while they await Clerk review
3. Once the Clerk takes action on the envelope, the envelope data and document are removed from Press Review Tool and are processed accordingly

Note: If the envelope details do not meet the Press Review conditions, the envelope data and documents are never surfaced within the Press Review Tool

Press Review Tool – Statewide Configuration



Configuration Option	Description	State Standard
Case Type Codes	This a list of case type codes that should be included in the Press Review tool	All Publicly-Viewable Case Type Codes
Days	This is the number of days documents should be included. Documents that are older than this date will be omitted from the Press Review tool	365
Filing States	This is a list of filing states that are to be included. Any filing not in one of these states will be omitted from the Press Review tool. (ex. Submitted, Under Review, Accepted, Rejected, etc.)	Submitted and Under Review
Security Groups to Omit	This is a list of case security group codes that are to be omitted. Any filing linked to a case with one of these security groups will be omitted from the Press Review tool.	Contains Sensitive Information
Document Types to Omit	This is a list of document type codes that are to be omitted from the Press Review tool.	

Review Statewide Baseline

- ❖ Review statewide baseline configuration
- ❖ Modify Case Types, Document Types or Case Security groups (if needed)

**Filing States and Number of Days will be set to baseline standards.*

Determine Access

- ❖ Create generic credentials (Username/Password) to provide authorized users access to the Press Review Tool
- ❖ Provide additional usernames (emails) that have authorization to access Press Review Tool

Submit eSolutions Support Ticket

- ❖ Submit your configurations and
- ❖ Allow 2 - 6 weeks for setup, testing, and promotion to production
- ❖ Consultation appointment can be scheduled via Support, or contact your eSolutions CSAM



Appendix