# eFileTexas.gov™

## Review Queue User Guide

# Copyright and Confidentiality

# Contents

# List of Figures

# 1 Review Queue Overview

The purpose of this document is to instruct the user on how to use the Review Queue.

The purpose of the Review Queue is as follows:

- To allow the user to review information associated with an e-filing.
- To process electronic filings (e-filings) and accept, reject, or forward them to another reviewer if needed.
- To annotate e-filings with text, highlights, and/or lines.


**Figure 1.1 – Understanding the Review Queue Data Flow**

# 2 Release 3.7 New Features

**Note: You must Reviewer privileges to use these features.**

### Email Link

A link to the filer's email address is displayed in the *Filer Information* section of the *Review Tool*.

A reviewer can send an email to the filer's email address listed under the *Filer Information* section in the **Envelope** section. A clerk can click the *Filer Email* link to send an email.

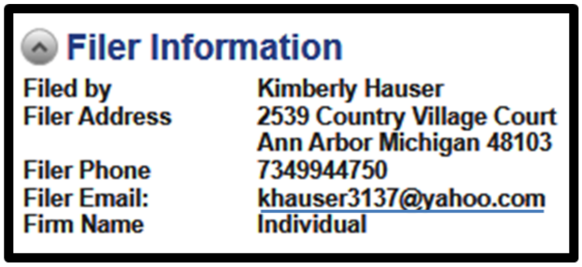



**Figure 2.1 – Filer Information Section**

### Digital Signatures

The digital signature feature allows a user to digitally sign a document using a stamp or an annotation.

The digital signature feature has been updated to keep the original signature valid when annotations or stamps are added to the document. Previously, a change in an annotation would have made the digital signature invalid.

Service Notifications for single or multiple digitally signed documents are no longer invalidated once digitally signed.

Multiple pages with the same annotations now receive one digital signature.

### Default Filters

The default filter allows the reviewer to save a filter commonly used when searching for cases. The default filter can be cleared by clicking the *Clear* button.

### Delete Attorney Names

A reviewer can now delete an attorney from a party using the *Parties* screen.

# 3 Before You Begin

**Topics Covered in this Chapter**

♦ System Requirements
♦ Page Navigation
♦ Error Messages

Before you begin, there are several items you should be aware of to assist you with the successful operation of your software.

**Note: Depending on your setup, all features may not be available. As a result, your screen may vary from what is shown in the document.**

## System Requirements

This section describes the recommended system requirements to successfully use the system.

- **Browser Requirements** – The system supports current versions of the Windows operating system using Internet Explorer 7 or above or Firefox. If your browser does not meet these minimum requirements, please contact your network administrator.
- **Connection Requirements** – A high-speed Internet connection is recommended.
- **Minimum Screen Resolution** – For best results, a setting of 1024x768 or better is highly recommended. If necessary, users can set their monitors to 800x600 pixels, but doing so may compromise the graphic display.
- **Document Format** – PDF is the only format allowed for attaching documents when using the system.

## Page Navigation

The following describes how to navigate eFileTexas.gov and populate data fields throughout the filing process.

### Navigate with Breadcrumbs

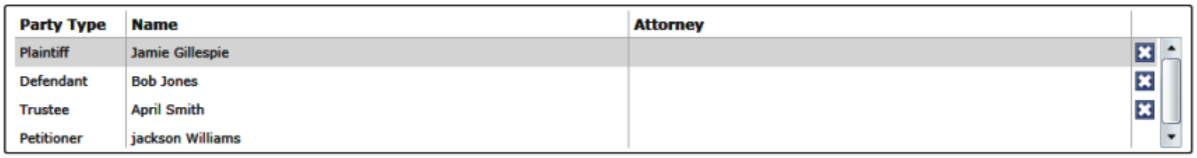
Breadcrumbs are a visual representation of the page you are currently on in the filing process. As you complete a page and move to the next page, the next page title illuminates to show you where you are in the process.

**Note: Breadcrumb navigation requires information to be entered in a sequential order. You cannot move to the next breadcrumb until all of the required information on the current or previous page is completed.**


**Figure 3.1 – Breadcrumb Navigation**

## Populate the Data Table

The data table is populated using information entered or selected when completing the forms throughout the filing process.



| Party Type | Name | Attorney |
| --- | --- | --- |
| Plaintiff | Jamie Gillespie | |
| Defendant | Bob Jones | |
| Trustee | April Smith | |
| Petitioner | jackson Williams | |

**Figure 3.2 – Data Table**

## Enter User Information

The user information you enter or select populates the data table.

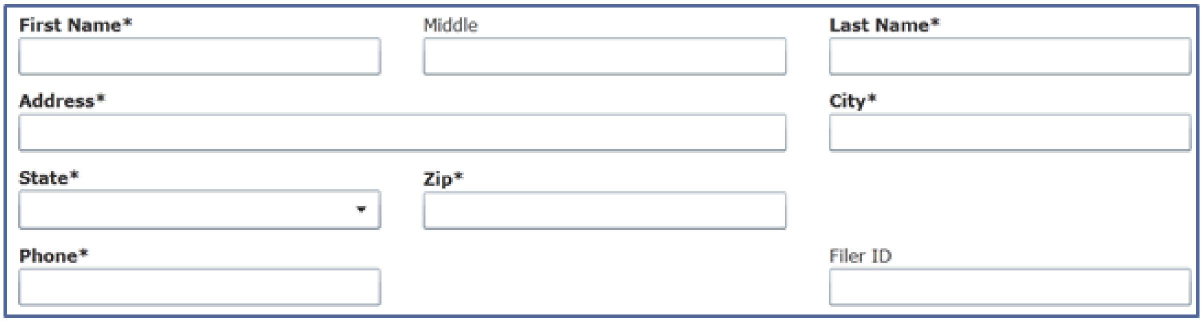



**Figure 3.3 – Data Fields**

## Resume Filing

eFileTexas.gov automatically saves a draft of pages where you have completed all required fields. This feature allows you stop work on a filing and resume the filing at a later time. To resume filing of a saved draft, click WORKSPACE the link at the top of the page, find your case on the **Filings** screen, and click the icon to resume your filing.

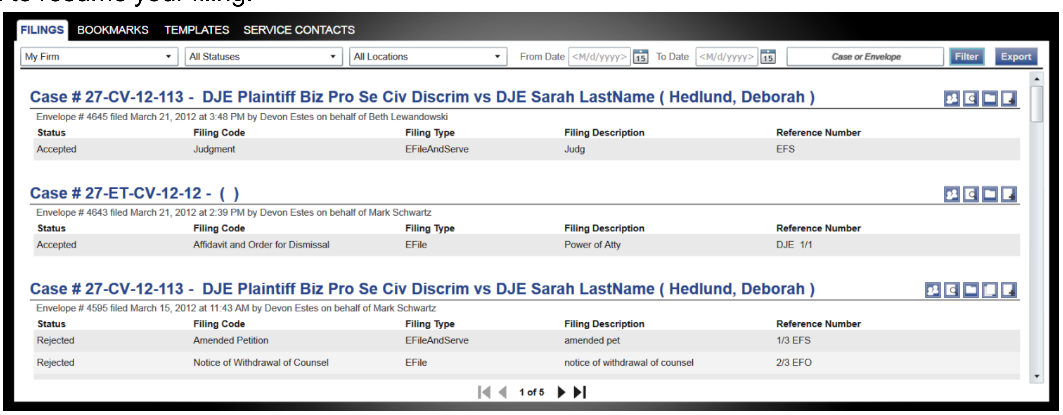



**Figure 3.4 – eFileTexas.gov Workspace**

# Error Messages

eFileTexas.gov displays several error messages to alert users when required information is not entered or invalid information is provided.

## Password Reset Error Scenarios

Invalid User – To reset the password for your account, you will need to provide the username for the account and answer the security question for the account. **Note: That user does not exist.**

No Security question on File – No security question on file for (username). Your firm administrator may still reset your password. **Note: Reset your password.**

## Enter Data in Required Fields

Required fields are those that contain an asterisk (*) next to the field name. If you don't enter the information required into a required field and try to advance, you will receive error messages.

**Note: Required fields may vary in different sections.**

Look for a field outlined in red in your form. Place the cursor on the outline of the field, and a required field message displays.

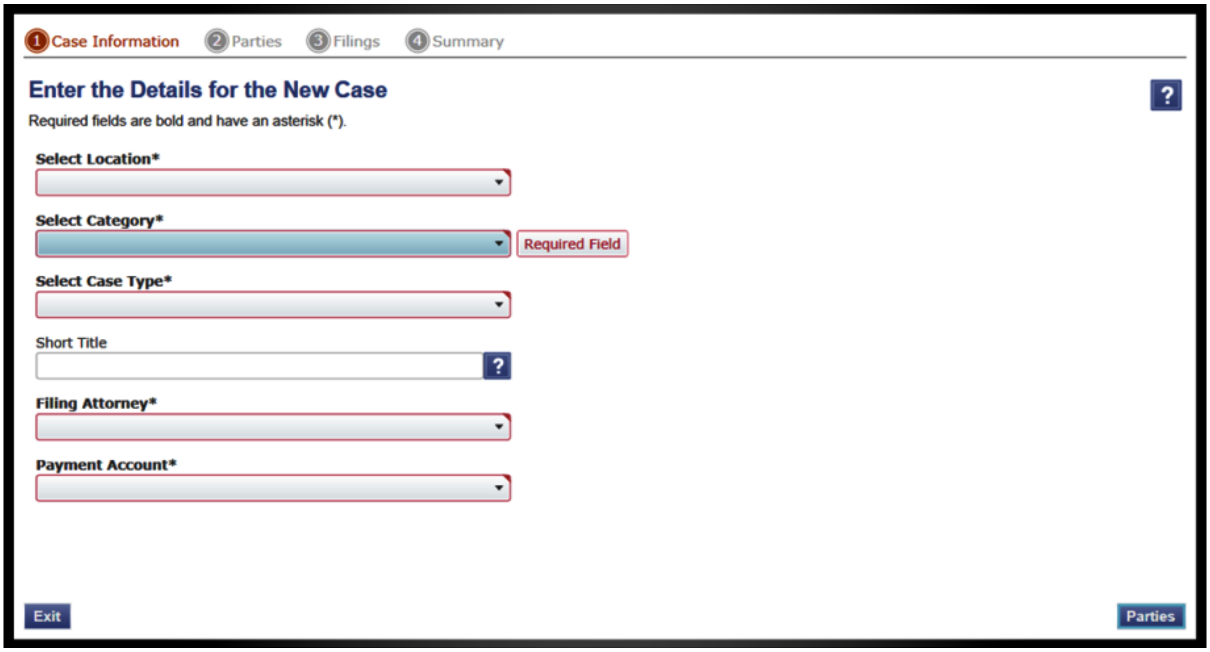



**Figure 3.5 – Required Field Error Message**

## Receive Error Messages

When eFileTexas.gov displays an invalid error message, this means a required field must be populated to continue.

If the screen does not change when a navigation button is selected, look for a field outlined in red in your form. Place the cursor on the outline of the field, and an error message displays.


**Figure 3.6 – Invalid Entry Error Message**

# 4 Home Page

**Topics Covered in this Chapter**

♦ Login and Logout
♦ Case Search

The home page serves as the gateway to the system. From this screen, you can register, log in, read your court's **Message of the Day**, access the user guides, view training sessions, and get contact information for Technical Support.


**Figure 4.1 – Home Page**

## Message of the Day

The **Message of the Day** provides important messages from the court. Check this section daily for important messages from the court.

## Login

The **Login** area allows the user to log in and use the system. Users can log in to by entering their e-mail address and password.

## Register Now

The *Register Now* link allows is a user to register in the system using their name, contact, and payment information. The system requires all users – whether Firm Administrators, attorneys, or individuals representing themselves – to be registered in the system.

## Forgot Password

The *Forgot Password* link allows a user to request their password information be re-sent to them in cases where they have forgotten their password.

### Keep Me Logged In

The *Keep me logged in* checkbox allows a user to remain logged into the system for future access.

### Learn

The **Learn** section has links to the user documentation. The following types of documents available to help you answer many of your day-to-day operation questions:

- The **User Guide** provides step-by-step instructions on using the system. The user guide covers activities such as logging in to the system, searching for existing cases, selecting the e-file and serve options, performing an e-file and serve, and changing user settings and password.
- The **Firm Administrator Guide** is specifically for the Firm Administrator. This guides covers administrative functions such as registering the firm; managing user, payment, and attorney accounts; and creating and editing the firm's contact lists.
- The **Quick Reference Guide** (QRG) provides only the steps needed to complete common tasks such as logging in to the system, searching for a case, initiating a new case, filing into an existing case, and reviewing the filing status.
- The **Frequently Asked Questions** (FAQ) guide lists the most frequently asked questions from the users. The FAQ covers questions pertaining to functionality.

### Train

Free regularly scheduled online training is available. You can register for training online and download user manuals.

- The **Web Conference Training Sessions** are scheduled according to the needs of the courts. Locate your specific court by scrolling through the list of training sessions for your court.
- **Self-study Online Training** is available by clicking on the link and choosing the topic of your choice.

### Support

The Technical Support Team is available to assist all users by calling 855.839.3453 Monday through Friday between the hours of 7 a .m. to 9 p.m. Central Time. You can also contact a Technical Support Representative with your questions by sending an e-mail to support@efiletexas.gov or by using the Chat option.

# Login and Logout

All users are required to log in to e-file and serve a document or to check the status of an existing filing. It is also a best practice for users to log out after they have completed their transactions.

## Resetting your Password

If you have forgotten your password, you can reset your password by entering the e-mail address provided during registration and clicking the Forgot Password? link.

**Note: Your password is case-sensitive. Make sure your caps lock is not on.**

**Note: You can unlock your account by using the Forgot Password? option and reset your password without having to contact the Firm Administrator if a security question is associated with the account.**

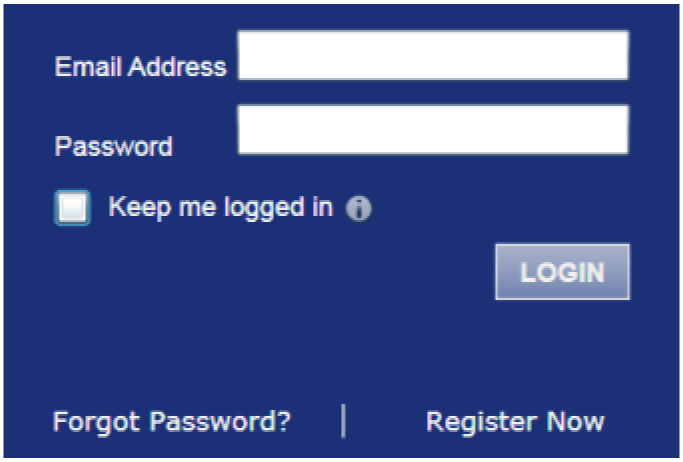



**Figure 4.2 – Login Window**

1. Click the Forgot Password? link on the **Login** window.

   The **Reset Password** window opens.

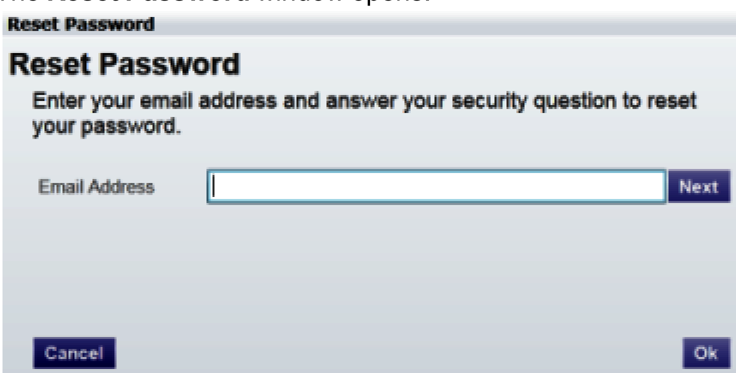



**Figure 4.3 – Reset Password – E-mail Address**

2. Type the e-mail address you provided during the registration process in the **E-mail Address** field.

   **Note: An error message stating No user is registered with that email address displays if the system cannot is unable to find your email address.**

3. Click the Next button to continue.

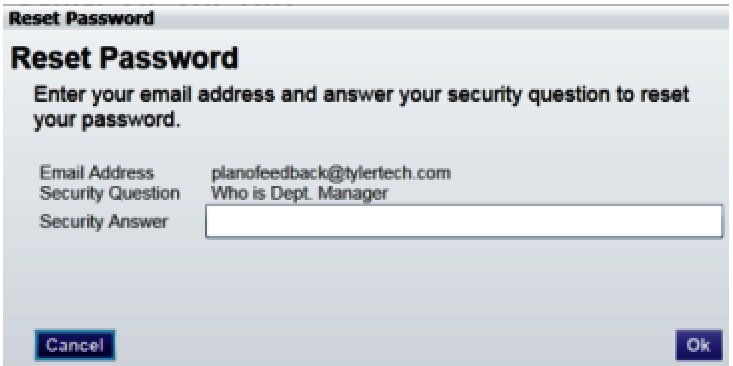



**Figure 4.4 – Reset Password – Security Answer**

4. Type your answer in the **Security Answer** field.
5. Click the **Ok** button, or click the **Cancel** button to cancel the reset password process.

   The system displays this message: **A password reset link has been sent to the email address associated with your account. If you do not see the password reset email in your Inbox, please check to see if it was delivered to your spam folder.**
6. Go to your email inbox.
7. Locate the email from no-reply@eFileTexas.gov.
8. Click the link labeled **Click here** to reset your password.

   You will be prompted to choose a new password.
9. Enter a new password in the *New Password* field.
10. Re-enter your new password in the *Repeat New Password* field.
11. Click the *Change Password* button.

   A confirmation screen displays: **Your password has been changed successfully.**

# Logging in

You can log in by using your e-mail address and password provided during the registration process. You must log in to be able to e-file or e-serve.

**Note: Click Register Now to register if you have not registered before.**

Perform the following steps to log in:

1. Go to your home page.
2. Enter your e-mail address and password (case-sensitive) in the fields provided.

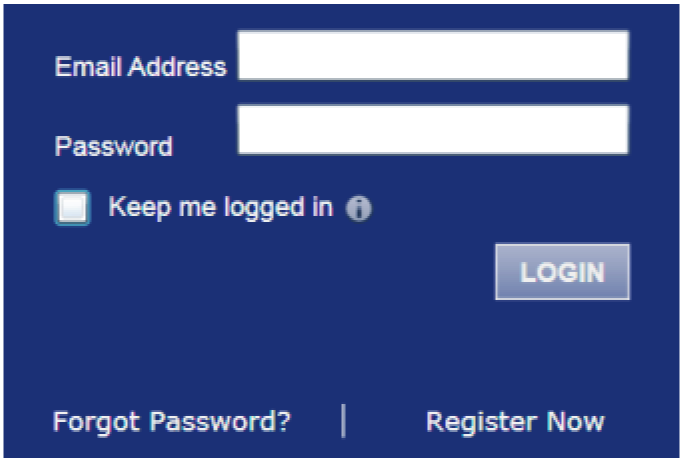



**Figure 4.5 – Login Area**

3. Select the Keep me logged in check box to stay logged in. This keeps you logged in until you click the logout link to logout.
4. Click the LOGIN button.

**Note: After several failed attempts to log in to the system, your account is locked. You can unlock your account by using the Forgot Password? option and reset your password without having to contact the Firm Administrator if a security question is associated with the account.**

Once you have successfully logged in, you can begin to e-file and e-serve.

## Logging Out

This section describes how to properly log out.

Perform the following steps to log out:

1. Click the LOGOUT link at the top right corner of the page to automatically log out.

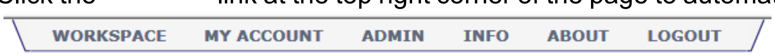



**Figure 4.6 – Logout Link**

2. Return to the home page to log in to the system.

# Case Search

Search for a case by selecting a location, entering a case number or a party name.

## Advanced Search

The **Advanced Search** feature provides the ability to search by party name using a person or a business name. The **Advanced Search** feature includes the ability to filter a search by party name based on the location or the case type.

## Performing an Advanced Search by Person

An asterisk (*) indicates a required field. **Note: Color themes may vary by site.**

Complete the following steps to perform an **Advanced Search** using the **Person** option:

1. Click the **Advanced Search** link in the **New Case** section at the top of the screen to open the *Advanced Search* dialog box.

   The *Advanced Search* dialog box opens.

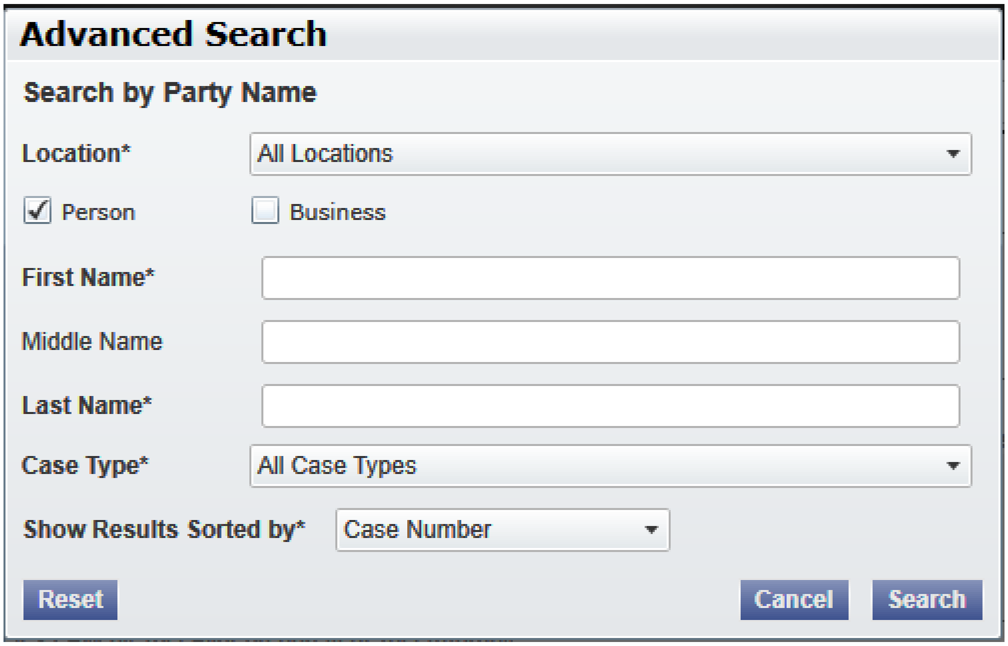



**Figure 4.7 – Advanced Search Dialog Box**

2. Select the **Person** check box.

   **Note: Check boxes are configurable. This option may vary by site. For example, some clients may only have businesses in CMS, so a check box is not required.**
3. Complete the fields in the *Advanced Search* dialog box.
4. Click the **Search** button to continue or the **Cancel** button to cancel. Click the **Reset** button to reset the form.

The search results are displayed.

## Performing an Advanced Search by Business

An asterisk (*) indicates a required field. **Note: Color themes may vary by site.**

Complete the following steps to perform an *Advanced Search* using the **Business** option:

1. Click the **Advanced Search** link in the **New Case** section at the top of the screen to open the *Advanced Search* dialog box.

   The *Advanced Search* dialog box opens.

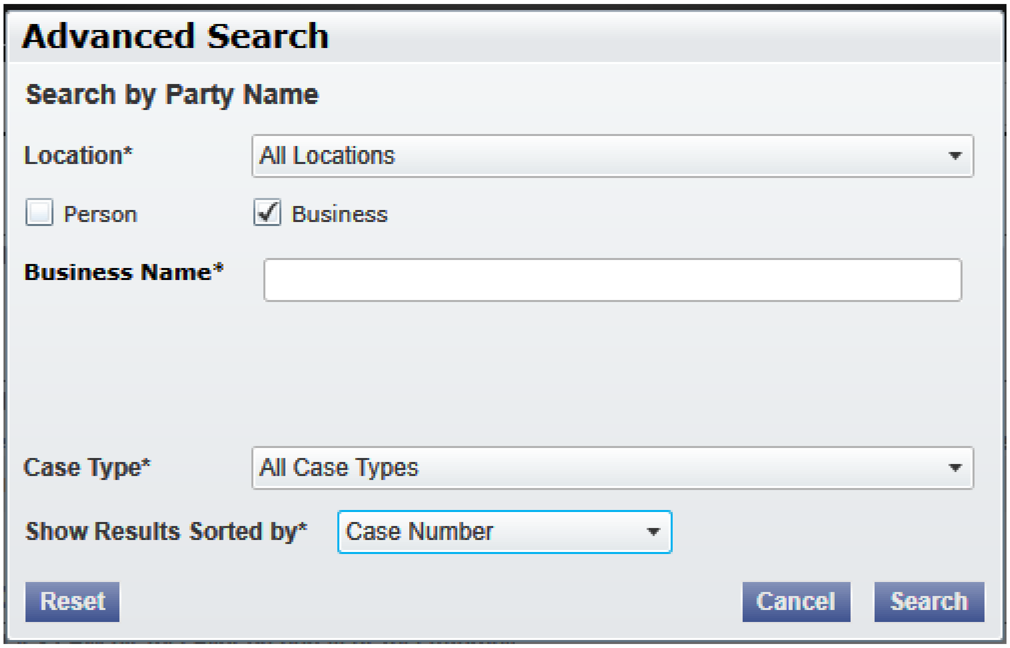



**Figure 4.8 – Advanced Search Dialog Box**

2. Select the **Business** check box.

   **Note: Check boxes are configurable. This option may vary by site. For example, some clients may only have businesses in CMS, so a check box is not required.**

3. Complete the fields in the *Advanced Search* dialog box.
4. Click the **Search** button to continue, or the **Cancel** button to cancel. Click the **Reset** button to reset the form.

The search results are displayed.

# 5 Accessing the Review Queue

**Topics Covered in this Chapter**

♦ Filtering the Review Queue
♦ Saving Default Filters

The Review Queue allows clerk reviewers to review cases.

You must have clerk privileges to access the Review Queue.

Perform the following steps to access the Review Queue:

1. Click the WORKSPACE link at the top of the page.


**Figure 5.1 – Workspace Toolbar**

2. Click the REVIEW QUEUE link on the toolbar.

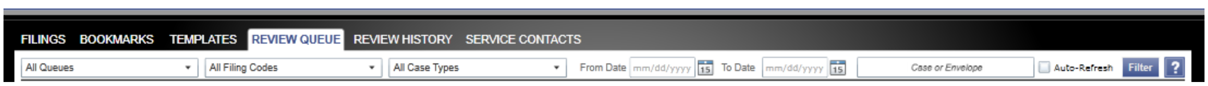



**Figure 5.2 – Review Queue Selected**

The **Review Queue** window opens.

**Note: Hover over the case status for tool tips regarding the status of the case.**

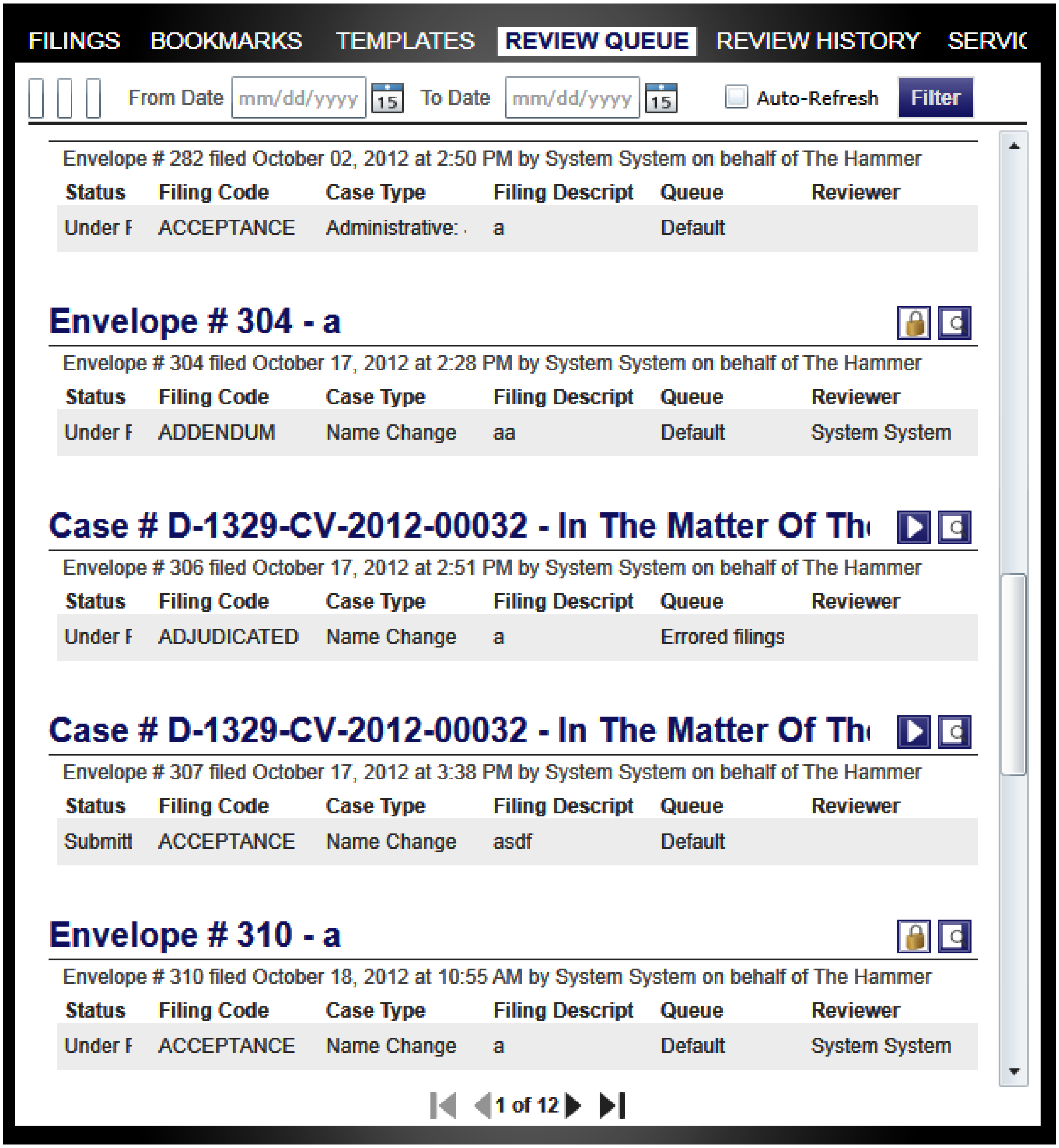



**Figure 5.3 – Review Queue Window**

3. Click the icon for the case you want to retrieve for review.

**Note: You can filter the case in the queue by using specific parameters. Refer to Filtering the Review Queue, page 16 for more information.**

The (Locked by User) icon displays on an envelope when another reviewer is reviewing the envelope or currently has the envelope open. **Note: The Court Administrator can remove the lock if needed. A message will display when you refresh your screen that a lock has been removed.**

# Filtering the Review Queue

Use the **Review Queue** filter to view only those filings that you require.

**Note: Only you and your court may see this information.**

1. Select the filter parameters using the drop-down lists or enter specific information in the search fields.

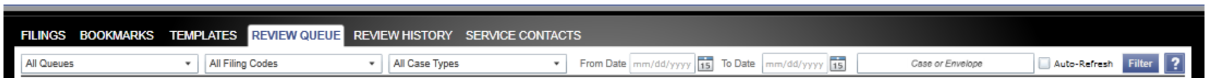



**Figure 5.4 – Review Queue Filter**

**Note: For the From Date or the To Date, click the  icon to select dates from a calendar, or you can type the dates manually (for example, 9/9/2010).**


**Figure 5.5 – Select the Dates Using the Calendar**

2. Click  to filter the search.

   **Note: To clear the filter, select Review Queue on the toolbar.**

   A list of cases meeting your search criteria displays.

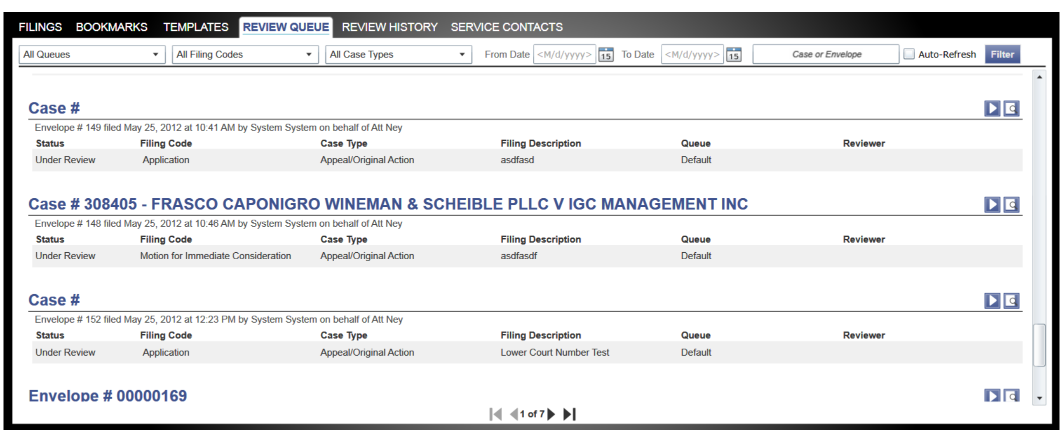



**Figure 5.6 – Review Queue Screen**

3. Click the  icon for the case you want to retrieve for review.

# Saving Default Filters

The default filter allows the reviewer to save a filter commonly used when searching for cases. The default filter can be cleared by clicking the *Clear* button.

Perform the following steps to save a default filter:

1. Select the *Review Queue* tab at the top of the page.
2. Select the filters on the toolbar using the drop-down lists.
3. Click the *Save* button to save the filters.

   **Note: The filters will be saved until you log in using a different ID. To reset a filter, clear the filter, then click the Save button.** The default filter can be cleared by clicking the *Clear* button.

# 6 Edit Envelope Information

For new cases, envelope information can be edited by clicking the Edit button, located above the **Case Information** section.


**Figure 6.1 – Edit and Verify Parties Toolbar**

On subsequent filings, you can edit the party information by clicking the Edit button. This opens the *Edit Envelope* window and allows you to edit the information as needed. You can also remove an attorney from the case by clicking the icon. If you are reviewing a new case filing, review the submitted party information to confirm it is accurate before accepting the new case filing.

You can correct or extend the filing information based on the court procedures associated with e-filing or from information obtained within the documents submitted by the filer. For example, you can add an additional party referenced in the document to the filing, or you can correct the spelling of a party name to match the spelling in the submitted document.

You can also correct any of the filing domain items, such as case type or filing code.

# 7 Working in the Review Queue

**Topics Covered in this Chapter**

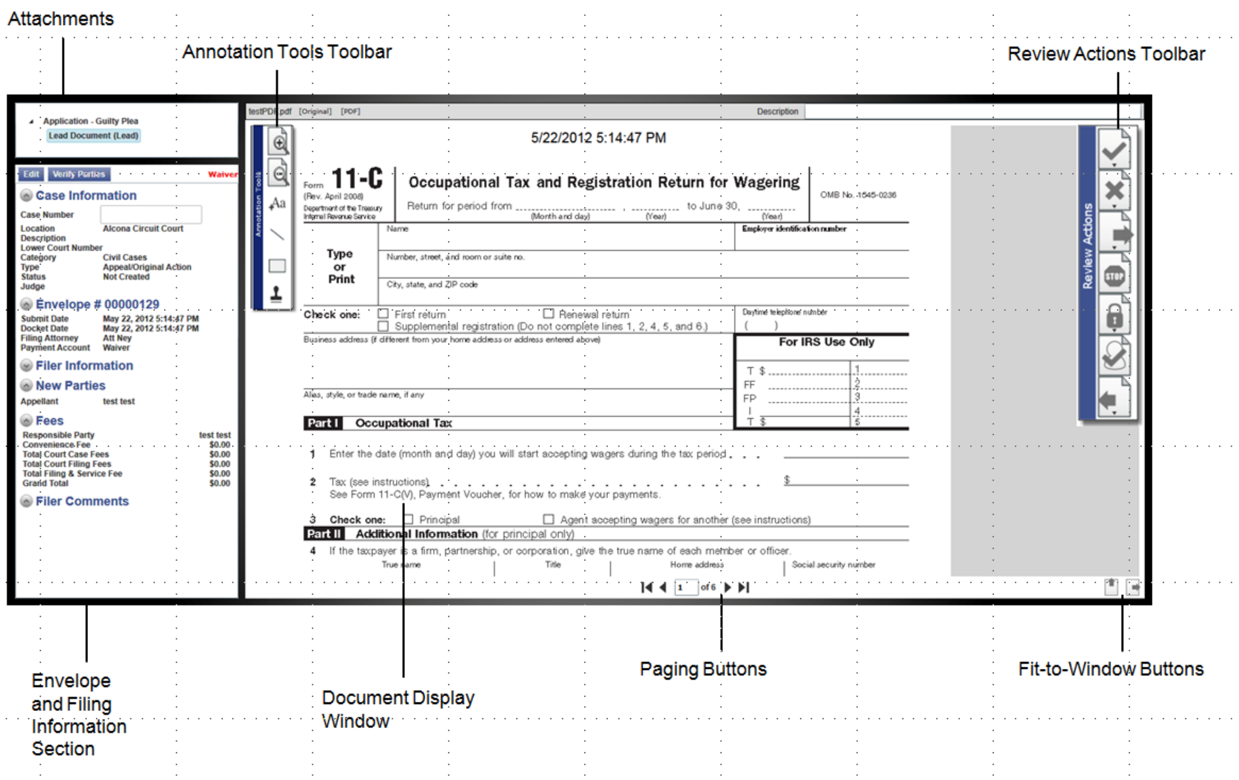
- ♦ Adding Annotations
- ♦ Review Envelope and Filing Information

When you select a filing to review, the **User Interface** window opens.

## Review Queue Overview

This section describes the envelope and filing information sections, the document display window, the annotation tools, the review actions buttons, the paging arrows, and the fit-to-window arrows.

**Figure 7.1 – Review Queue User Interface**




## Attachments

The **Attachments** section displays any documents attached to the envelope.

## Envelope and Filing Information Section

The **Envelope and Filing Information** section displays the case information, the envelope information, the parties involved in the case, the fees association with the filing, and any filer comments.

## Document Display Window

The **Document Display** window displays the currently selected filing document. This window contains the **Annotation Tools** toolbar, the **Review Actions** toolbar, paging arrows, and fit-to-window arrows.

### Annotation Tools Toolbar

The **Annotation Tools** toolbar default location is on the upper left edge of the **Document Display** window. It provides tools to zoom in or out of the document or add text annotations, lines, highlights, and image stamps. Pause your mouse over a button to display a tooltip describing the button's function. Both the **Annotation Tools** toolbar and the **Review Actions** toolbar may be selected and moved anywhere within the **Document Display** window.

### Review Actions Toolbar

The **Review Actions** toolbar default location is on the upper right edge of the **Document Display** window. It provides tools to accept the filing, reject the filing, forward the filing, end the review, change the document security, manually accept the filing, or send the filing back to filer. Pause your mouse over a button to display a tooltip describing the button's function. **Note: Toolbar options vary by site.**

### Paging Arrows

The paging arrows allow you to access different pages in the document.

**Note: You must use the paging arrows to navigate to a specific page. Review actions will vary depending on client site.**

### Fit-to-Window Arrows

The fit-to-window arrows allow you to modify the document display.

# Adding Annotations

Use the **Annotation Tools** toolbar to add text annotations and lines to documents. You can also highlight text or upload and apply images on documents using the image stamps.

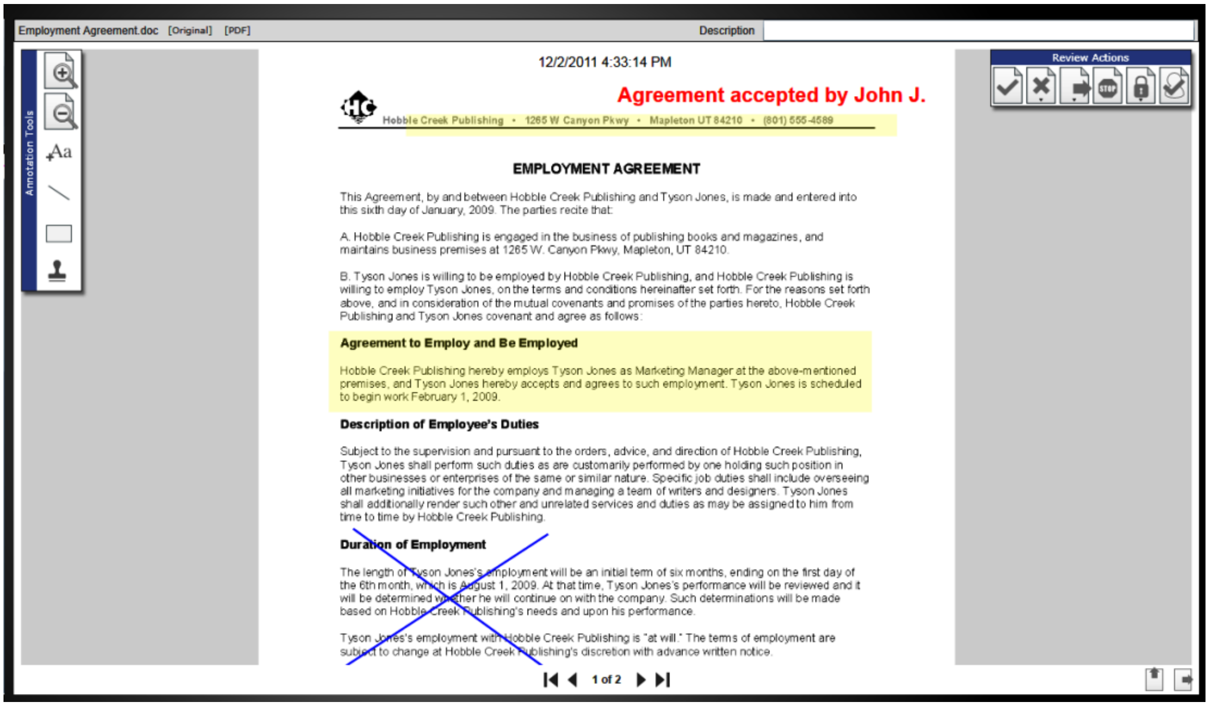



**Figure 7.2 – Document Display Window with Annotations**

Complete the following steps to add annotations:

1. Click  to add a text annotation. The text annotation dialog box opens. Use the text annotation dialog box to modify the font face, size, characteristics, and color.


**Figure 7.3 – Modifying Text Annotations**

2. Click  to add a line annotation to your document. The line annotation dialog box displays. Use the line annotation dialog box to modify the size and thickness of the line.

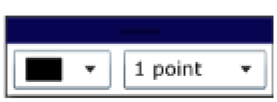



**Figure 7.4 – Modifying Line Annotations**

3. Click  to add a yellow highlight box to the document. Click and drag your mouse over the area you wish to highlight to draw the box.

4. Click to add the available image stamps options to the document.

   The image stamp gives the reviewer the ability to upload and apply images on documents during the clerk review process.


**Figure 7.5 – Image Stamp Select Stamp Window**

## Zooming In and Out

Use the zoom buttons on the **Annotation Tools** toolbar to zoom in or out.

- Click to zoom in on the document.
- Click to zoom out from the document.

## Paging Arrows

The paging arrows allow you to access different pages in the document.

**Note: You must use the paging arrows to navigate to a specific page. Review actions will vary depending on client site.**

- goes to the first page of the document.
- goes to the previous page.
- goes to the next page.
- goes to the last page.

## Fit-to-Window Arrow Buttons

The fit-to-window arrow buttons allow you to modify the document display.

- The (fit-to-window arrow button) scales the image so that it fits the entire height of the *Document Display* window. The width automatically scales to the new height, ensuring the document's visual presentation is not distorted.

- The (fit-to-window arrow button) scales the image so that it fits the entire width of the **Document Display** window. The height automatically scales to the new width, ensuring the document's visual presentation is not distorted.

# Review Envelope and Filing Information

The **Envelope and Filing Information** section displays case and envelope information, filer information, parties involved in the case, fees associated with the case, and filer's comments.

Click to collapse the information, or click to expand the information.


**Figure 7.6 – Envelope and Filing Information Section**

## Edit Envelope Information

For new cases, envelope information can be edited by clicking the Edit button, located above the **Case Information** section.


**Figure 7.7 – Edit and Verify Parties Toolbar**

On subsequent filings, you can edit the party information by clicking the Edit button. This opens the *Edit Envelope* window and allows you to edit the information as needed. You can also remove an attorney from the case by clicking the icon. If you are reviewing a new case filing, review the submitted party information to confirm it is accurate before accepting the new case filing.

You can correct or extend the filing information based on the court procedures associated with e-filing or from information obtained within the documents submitted by the filer. For example, you can add an additional party referenced in the document to the filing, or you can correct the spelling of a party name to match the spelling in the submitted document.

You can also correct any of the filing domain items, such as case type or filing code.

## Sending Emails to Filer

A clerk reviewer can send an email to the filer's email address listed under *Filer Information* in the *Envelope* section.

Perform the following steps to send an email to the filer:

1. Click the email address link next to the *Filer Email* field in the *Filer Information* section.


**Figure 7.8 – Filer Information Section**

2. Click the link for the email address. This opens your email default email tool.

   This opens your default email tool as a mailto: link.
   **Note: Some browser or system combinations will open a new and empty browser window or tab. This is a expected behavior and a result of how the Silverlight plug-in interacts with the browser and OS for opening mailto: links.**

3. Type the email and send to the filer.

## Verify Party Information

The **Parties** section displays information regarding the parties connected to the case.

Click the Verify Parties button to view the party information.

The *Verify Parties* window opens.

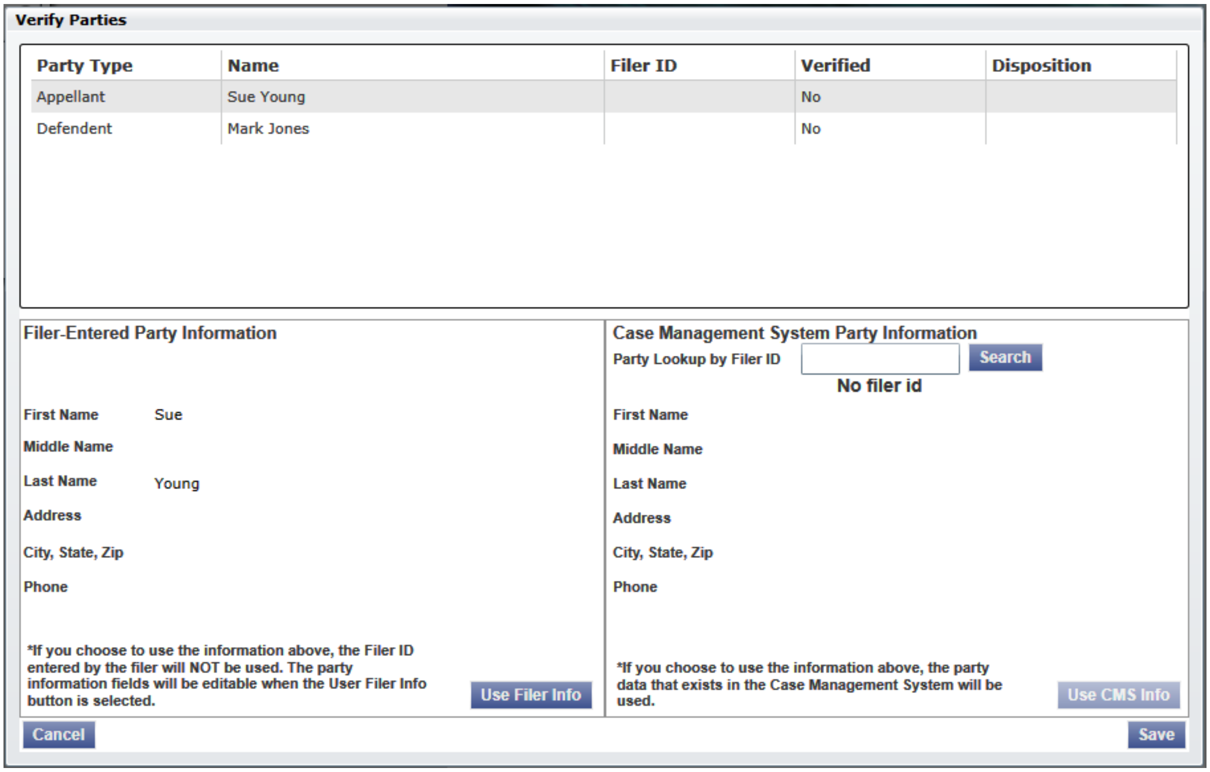



**Figure 7.9 – Verify Parties Window**

For new cases, the party information can be edited by clicking the  button in the **Filer-Entered Party Information** window. If you are reviewing a new case filing, ensure the party information is accurate before accepting the new case filing. For subsequent filings, the party information cannot be edited.

## Filer-Entered Party Information

The **Filer-Entered Party Information** section displays the name and address of the party entered by the filer.

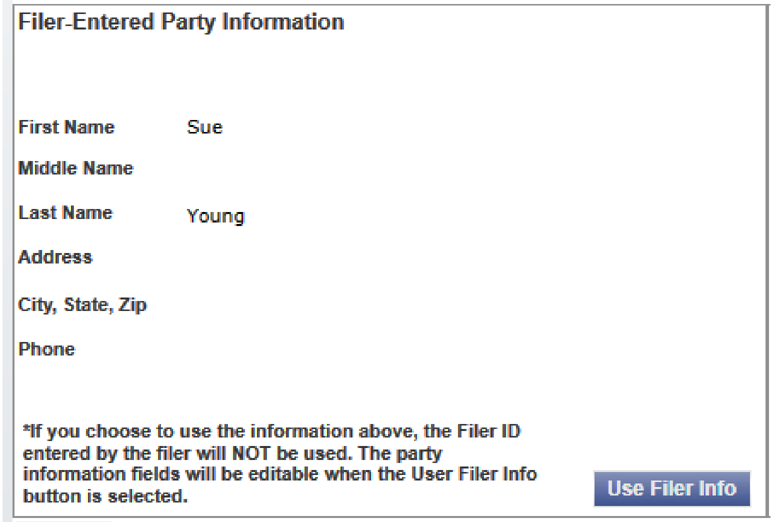



**Figure 7.10 – Filer-Entered Party Information Section**

### Case Management System Party Information

The **Case Management System Party Information** section pulls filer information from the party information entered into Case Manager.

Enter the filer ID in the field provided, and then click the Search button to populate the fields.

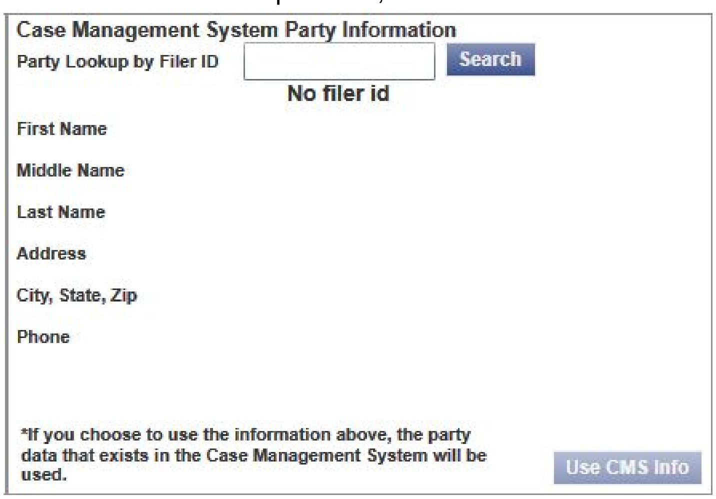



**Figure 7.11 – Case Management System Party Information Section**

## Attachment Section

The **Attachment** section displays the lead documents and all other attachments for the case.

There may be one or more documents listed in the attachment section.


**Figure 7.12 – Attachment Section**

Determine which document you want to work, and click the link on the document to display the document in the **Document Display** window.

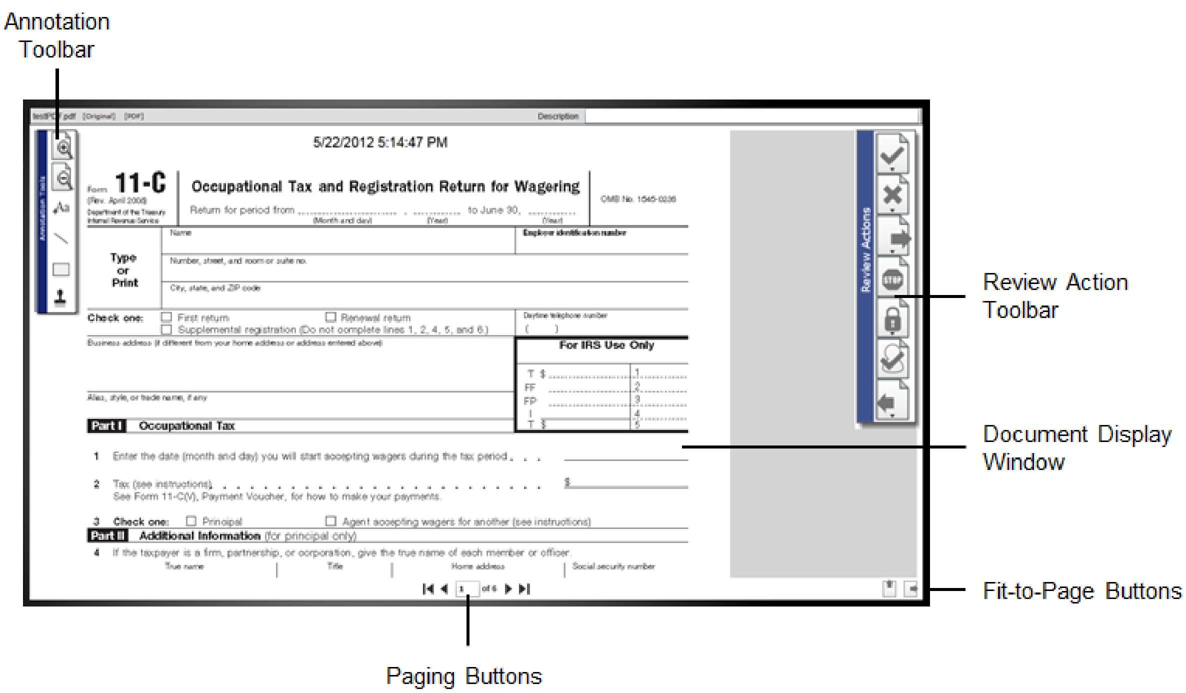



**Figure 7.13 – Document Display Window**

# Review Case Information

The **Case Information** section displays the case filing information.

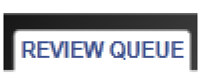

**Figure 7.14 –**

- Check the case information to make sure the information is correct.
- Check to see whether a judge is assigned to the case. If not, go to Manually Assigning a Judge to a Case, page 28 for the required steps.

## Manually Assigning a Judge to a Case

You can manually assign a judge to a case using the manual judge assignment feature.

Perform the following steps to manually assign a judge to a case:

1. Select the  tab on the toolbar.

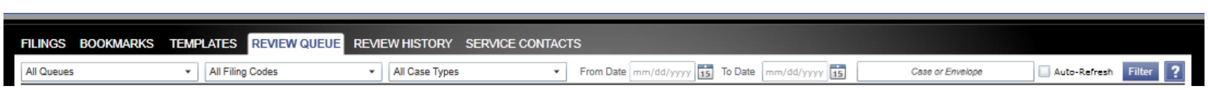




**Figure 7.15 – Review Queue Selected**

2. Select a judge from the drop-down list of judges in the **Case Information** section.

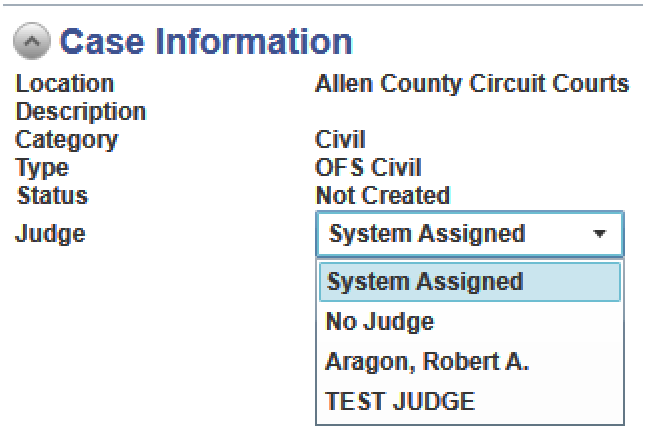



**Figure 7.16 – Judge Selection Drop-down List**

This action assigns the selected judge to the case.

# Review Envelope Information

The **Envelope** section displays the envelope number for a new filing or the case number for a subsequent filing, the submitted and docket date, the filing attorney for the case and the type of payment account associated with the case.

Click the arrow to collapse the information, or click the arrow to expand the information.

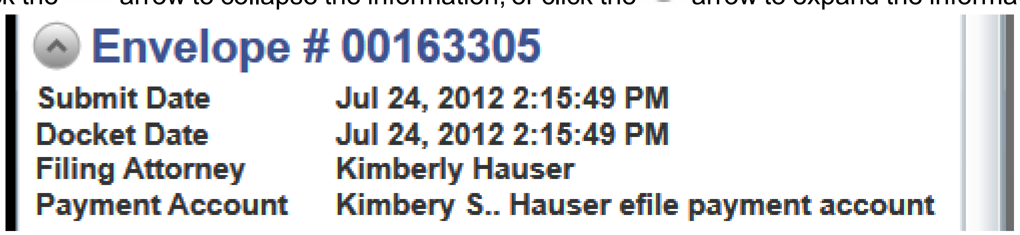



**Figure 7.17 – Envelope Information Section**

Review the envelope information to ensure the information is correct.

## Edit Docket Date and Time

Select the underlined link under the date and time to edit the current docket date. This opens the calendar and clock.

Select a different docket date and time using the calendar and clock option.


**Figure 7.18 – Docket Date Calendar**

## Filing Fees

The **Fees** section displays the filing fees set by the courts.

**Note: If you are reviewing a new case filing, review the filing fees to confirm they are accurate before accepting the new case filing as this will charge the payment account when accepted.**

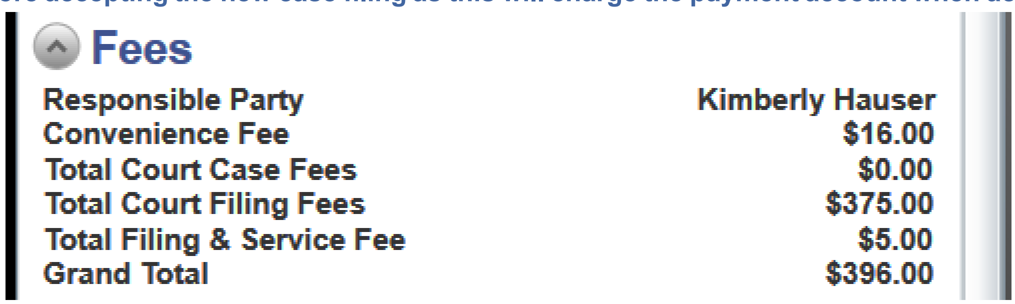



**Figure 7.19 – Filing Fees**

## Filer Comments

The **Filer Comments** section includes any comments the filer may have added for the clerk reviewer to read.

Review the **Filer Comments** section for any comments the filer may have entered.


Figure 7.20 – Filer Comments Section

# Performing Review Actions

The clerk reviewer can use the **Review Actions** toolbar to perform review actions on a filing.

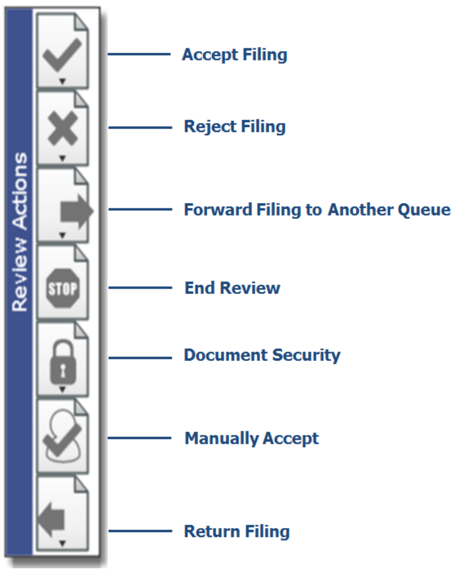



Figure 7.21 – Review Actions Toolbar

**Note: The options available on the toolbar vary based on site requirements.**

## Accept Filing

Click the  icon to accept the filing.

**Note: If prompted, enter the case number in the Case Information field in the format assigned by your court.**


Figure 7.22 – Accept the Filing Icon and Comment Window

When you select the arrow on the bottom of the icon, the **Comment** dialog box opens.

You can type notes in the **Comment** field.

## Reject Filing

Click the  icon to reject the filing.


Figure 7.23 – Reject the Filing Icon, Select Reason and Comment Window

When you select the arrow on the bottom of the icon, the **Select Reason** dialog box opens.

You can select the reason from the drop-down list and enter additional notes regarding the rejection in the **Comment** field.

## Forward Filing to Another Queue

Click the  icon to forward the filing to another queue.

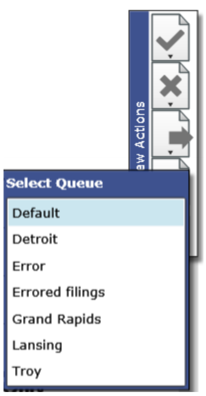



Figure 7.24 – Forward Filing Icon and Queue Selection Window

When you select the arrow on the bottom of the icon, the **Select Queue** dialog box opens. Select a queue from the list.

## End Review

Click the  icon to end the review and return the filing to the queue without changing the status.

## Document Security

Click the  icon to change the security of the document.
**Note: The color changes when the icon is selected.**

The **Select Document Type** dialog box opens.

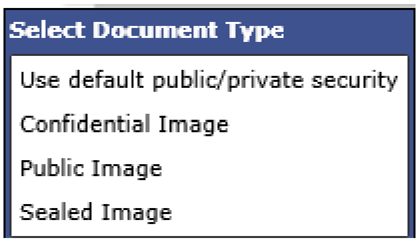



**Figure 7.25 – Select Document Type Window**

**Note: This selection only affects security for the document displayed, not for the entire envelope.**

## Manually Accept

**Note: Prior to the selecting the Manually Accept filing icon, create a case number in Odyssey to assign to the case you plan to manually accept. When you manually accept a filing, the case number is not automatically assigned to the initial case.**

Click the  icon to manually accept the filing.

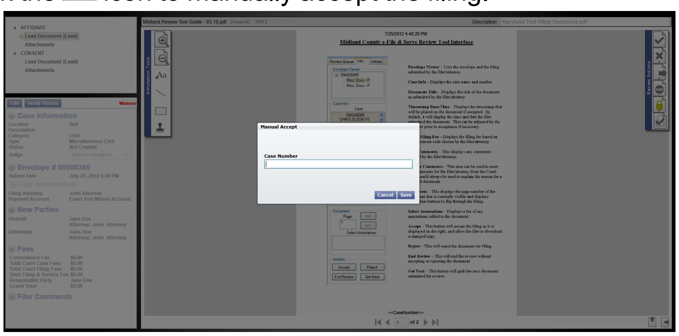


**Figure 7.26 – Manually Accept Case Number Window**

- Manual accept requires a case number to be provided before the review is completed.
- The filing is marked as accepted.
- Service notifications are sent.
- Financial information is captured in Chase.

## Return Filing

Click the  icon to return filings that have missing or incorrect information.

**Note: The reviewer or court should contact the filer to let them know what corrections need to be made to the filing before the filing is returned to the filer.**

Once the filing is returned to the filer, the following actions occur:

- The filing leaves the review queue.
- The filing status returns to the submitted status.
- The filing appears in the filer's filing queue with the submitted status and no notes to indicate the reason it was returned.

The filer must cancel the filing and copy either the envelope or file into the case and make the necessary changes to the filing and resubmit. This process generates a new envelope number and authorizes the filer's credit card a second time where necessary. The filer is not charged for the original envelope.

# 8 Review History

**Review History** is a main menu link visible to users with the reviewer role. The history list includes previously accepted and rejected filings processed by the current reviewer along with filings the reviewer has previously worked.

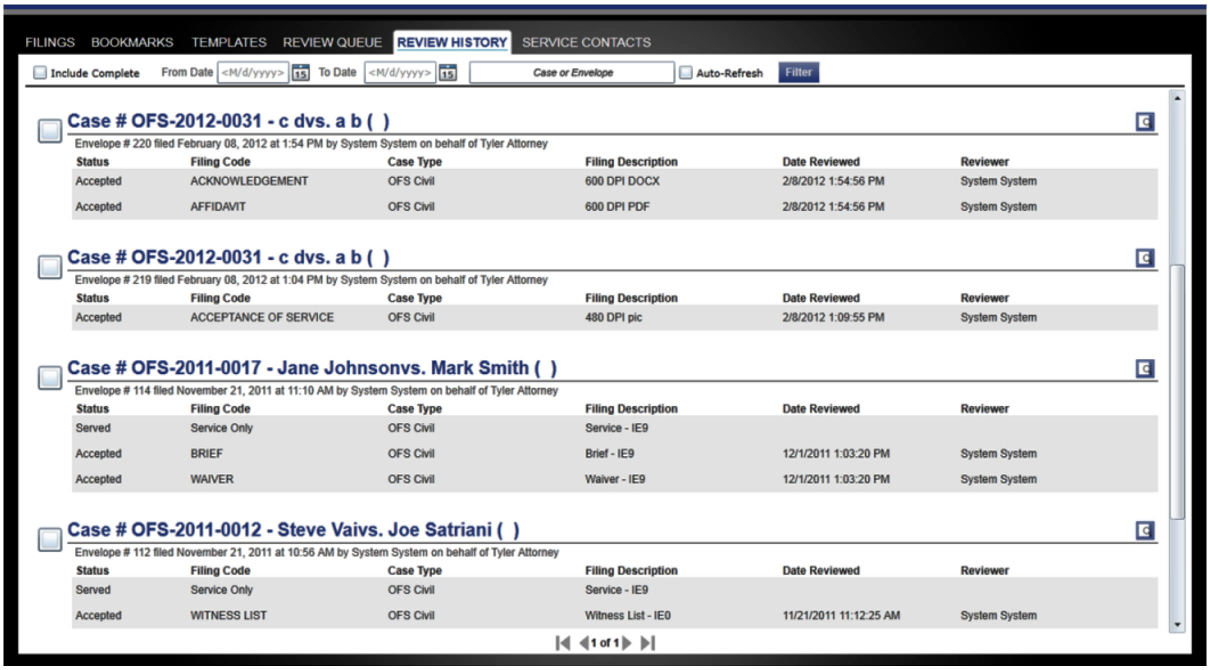



**Figure 8.1 – Review History Window**

## Accessing the Review History

Click the REVIEW HISTORY tab on the toolbar.

## Filtering Completed Reviews

Select the check box next to the envelope to mark it as complete and the envelope is immediately removed from Review History window.

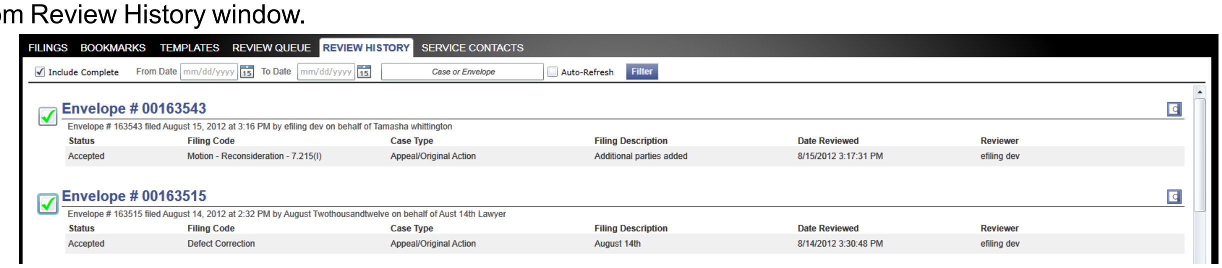



**Figure 8.2 – Completed Check Box Selected**

## Filtering Using Include Complete

You can remove completed filings from the **Review History** window by deselecting the Include Complete check box, then clicking the Filter button.

To re-populate the completed filings back into your **Review History** window previously filtered out, select the Include Complete check box, then click the Filter button.