

# Electronic Document Management System



## *eFile Training User Guide*

**Version: 3.0**

January 3, 2011

## Introduction

Welcome to eFiler training. During this session participants will learn how to file a new case, managing existing cases and other critical information when eFiling.

During this session participants will see how procedures are performed and have the opportunity to practice within the training environment to help reinforce learning and transfer this knowledge.

## Topic Overview

The eFile training session includes the following topics:

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## Prepare Documents

Before initiating a case within the EDMS, it is best to prepare all necessary documents in PDF format.

**Create Documents** – When creating PDF documents for eFiling, utilize standard fonts (Times New Roman or Arial are the most common).

*Note!* All documents are sent as PDF files except for Proposed Orders which should be submitted as a Microsoft Word editable format.

**Document Size** – There is a 10 MB limit per document. Multiple documents can be submitted per case. Each case has a total size limit of 16 MB per submission.

**Document Format** – Any filing requiring a signature must be signed, with either an actual signature, the symbol “/s/”, or a digitized signature per Chapter 16 rules. The following information about the person signing the filing, if applicable, must be typewritten or printed under the person’s signature -

- /s/Name
- Law Firm
- Mailing Address
- Phone Number
- Email Address

## Notes

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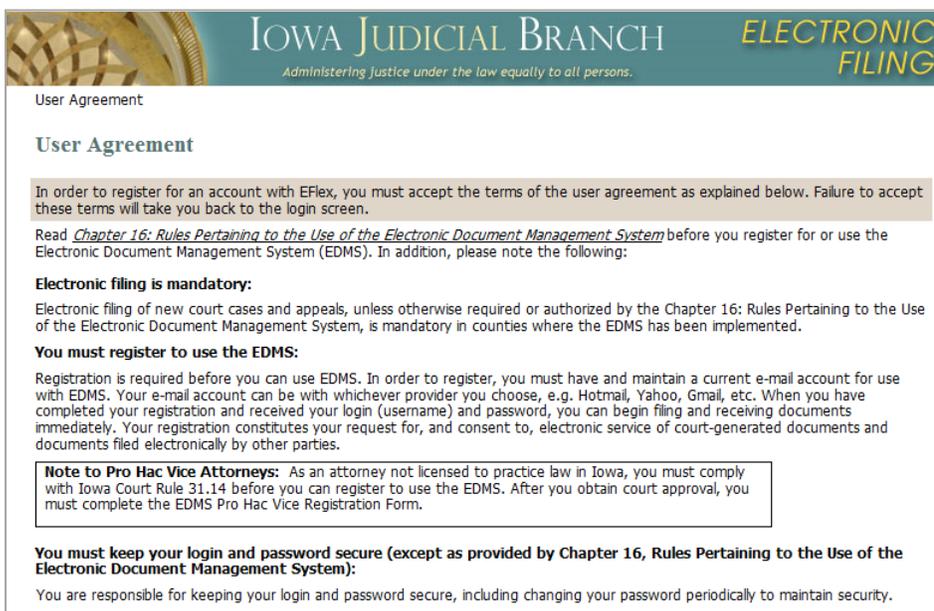


## Registering for an eFile Account

1. Open a web browser (not illustrated).
2. Enter the following URL - <https://www.iowacourts.state.ia.us/Efile> or via the link provided on the Judicial Branch homepage.
3. Click **Request Account**.



4. Read and review the **User Agreement**. Read and review the **Chapter 16: Rules Pertaining to the Use of the Electronic Document Management System**.





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5. Click the **acceptance radio button** to acknowledge the User Agreement and Chapter 16 Rules.

I have read, understand, and agree to comply with this user agreement and the rules and procedures contained in Chapter 16: Rules Pertaining to the Use of the Electronic Document Management System.

I do not accept the terms of the user agreement

Cancel Submit

6. Click **Submit**.
7. Select a **User Role**.

*Registered Filer* – registered parties or self-represented litigant

*Iowa Attorney* – attorney licensed to practice law in Iowa

*Agent* - An officer, employee, or non-lawyer representative of a partnership, association, corporation, or Tribe who is authorized by Iowa code to represent that entity in certain small claims and civil matter.

*Government Agency* – The non-lawyer staff for an agency such as Department of Public Safety, Department of Transportation, Department of Human Services

*Pro Hac Vice* – a non-Iowa attorney practicing law in Iowa that is sponsored by an Iowa Attorney

*Specialized Non-Party Filers* – anyone who is not an attorney who files documents on multiple cases but is not a party, such as a process server or bail bonds agent

*Supreme Court Clerk & Clerks Office* – reserved for individuals working directly with the Supreme Court

*Department of Corrections* – individuals who work with the Department of Correctional Services

**USER ROLES**

Select your user role:

- Registered Filer
- Iowa Attorney
- Agent
- Government Agency
- Pro Hac Vice
- Specialized Non-Party Filers
- Supreme Court Clerk
- Supreme Court Clerks Office
- Department of Corrections

Cancel Next

8. Click **Next**.
- Note!** Registered Filers skip steps 9 and 10. Continue to step 11.



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- For all roles (except for Registered Filers), select **Existing** and scroll through and select the desired organization. If the desired organization is not listed, click **New** and enter in the **Company Name**.

- Click **Next**.
- Complete the required fields to set up a **User Account**.

*User Name* - select a unique user name. This will be what is used to log into the eFile system.

*Password* - choose a password that is at least 4 characters long

*AT PIN* - attorney's unique Personal Identification Number assigned by the Office of Professional Regulation. Include a capital AT prior to the numbers.

*ICIS ID* - For those eFile user accounts that request the ICIS ID, leave this field blank if this information is unknown.

*Email* - this address will be used to receive courtesy notifications.

*Alternate Email* – include additional addresses to receive notifications

*Address* - My Company's Address will display for existing organizations. A new organization will need to enter in the appropriate fields.

- Click **Submit**.





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## Logging into an eFile Account

1. Return to the **Log In** page, and enter the **User Name** and **Password** just registered.
2. Click **Log In**.



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## Forgot Your Password

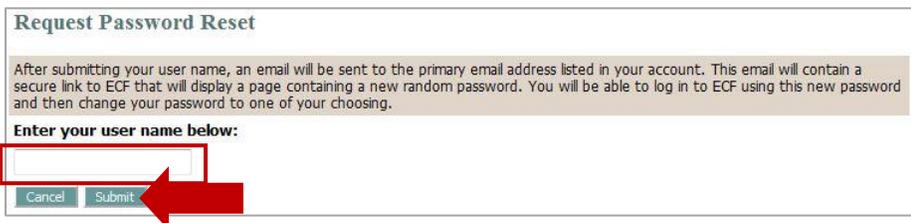
1. Click **Forgot Your Password?**



The screenshot shows the Iowa Judicial Branch eFiling website. The header includes the logo and navigation links. The main content area has a 'Log In' section with fields for 'User Name' and 'Password'. A link labeled 'Forgot Your Password?' is circled in red, and a red arrow points to it from the right.

2. **Enter** in the User Name.

3. Click **Submit**.



The screenshot shows the 'Request Password Reset' form. It contains a text box for 'Enter your user name below:' which is highlighted with a red box. Below the text box are 'Cancel' and 'Submit' buttons. A red arrow points to the 'Submit' button.

4. After submitting the user name, an email will be sent to the primary email address listed in the account. This email will contain a secure link that will display a page containing a new random password.
5. Return to the **Log In** page, and enter the **User Name** and **Temporary Password** just assigned.
6. Click **Log In**.



The screenshot shows the Iowa Judicial Branch eFiling website. The 'Log In' section is visible, with the 'Log In' button circled in red. A red arrow points to the 'Log In' button from the left.

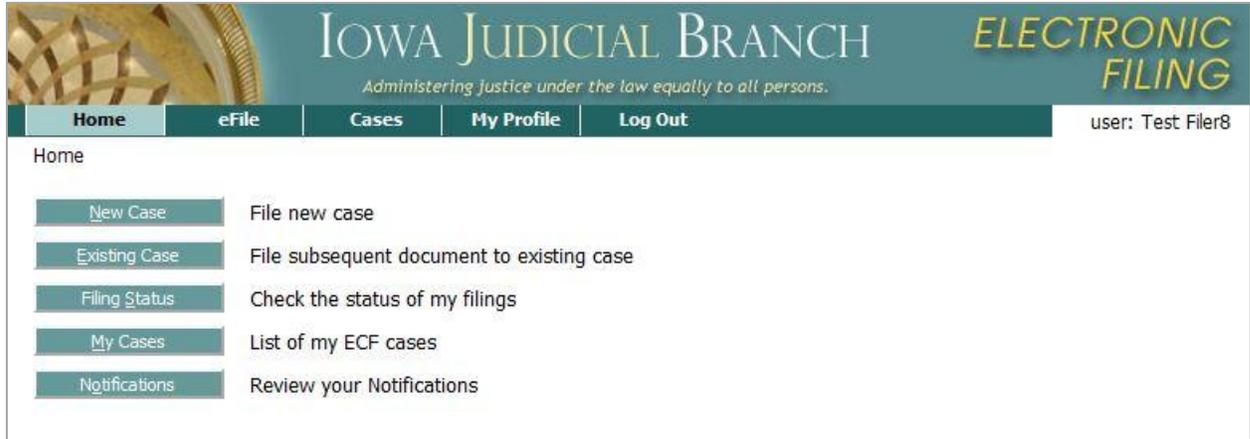
**Note!** Passwords can be reused.





## Home Screen

*Note!* The Home Page buttons may change dependent on which role is selected when setting up the account.



## Menu Options

**Home** – This is a link to return to the home screen of eFiling.

**eFile** – Four types of eFile options are available: New Case, Existing, Filing Status, Draft Filings.

**Cases** – Contains entries for My Cases, Notifications, and Filing Charges.

**My Profile** – Links to edit My Profile, Change Password, and Log in History.

**Log Out** – This link will end the current session.

*Note!* A session will terminate automatically if there is no activity on the webpage for 20 minutes. A session is considered active as long as there is interaction with the web server.

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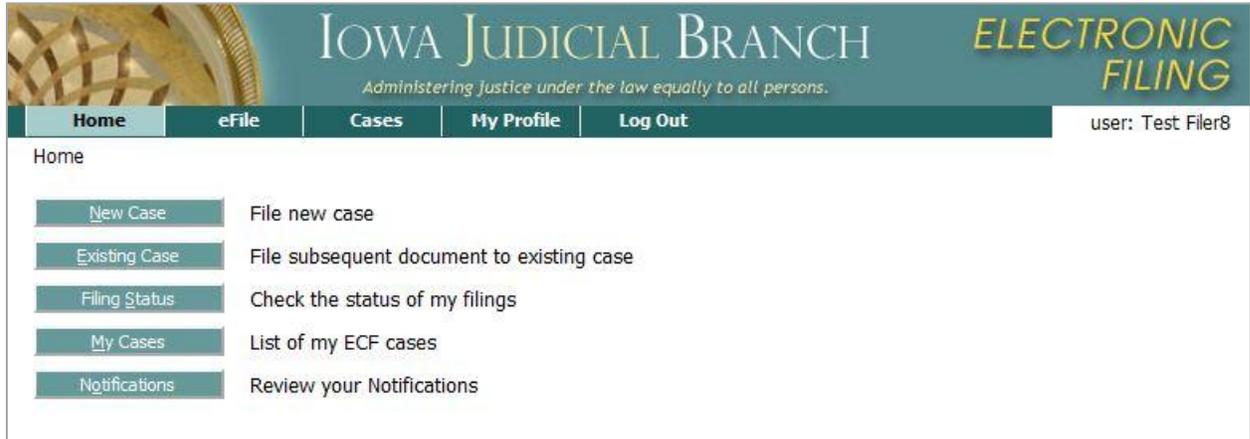
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## Home Page Buttons

Five action buttons are easily accessible from the home page – New Case, Existing Case, Filing Status, My Cases, and Notification.



**New Case** – Initiate a new case

**Existing Case** – File subsequent document to existing case

**Filing Status** - Check the status of filings

**My Cases** - List of EDMS cases

**Notifications** – Review electronic notifications

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## Filing a New Case

Initiate a case by adding the information normally captured in a paper coversheet and attaching any necessary documents to the filing.

*Note!* Click Move to Draft to save a case to finish at a later time.

*Important!* All documents should be created or scanned prior to accessing starting an eFile case.

*Note!* Small Claims fillable forms are available on the eFile site.

1. Click **New Case**.



2. Click the **Case Type**.



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3. Select the **Case Sub Type**.



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*Note!* Small Claims is displayed, but the Sub Type will vary dependent upon which category is selected.

The screenshot shows a window titled "Case Sub Type" with a list of options: SMALL CLAIM - AUTO ACCIDENT, SMALL CLAIM - FORCIBLE ENTRY, SMALL CLAIM - MONEY JUDGMENT, SMALL CLAIM - OTHER, SMALL CLAIM - REPLEVIN, SMALL CLAIMS - ABANDONMENT, and SMALL CLAIMS - COLLECTION OF TAXES. A red box highlights the entire list. A "Back" button is at the bottom.

4. **Complete the required fields.** The \* denotes the required fields.

Filer Reference No – number used for tracking within the filer’s organization

\***County** – Select the appropriate county

\***Case Title** – enter in a title, the clerk’s office will review and edit accordingly

Prayer Amount – for Small Claims only, will not display for other case types

\***Add My Parties** – by default the eFiler is entered as a Plaintiff. Click on the Participant Name and complete as many fields of data that are available.

\***Add Other Parties** – enter in as much data that is available on the other party.

*Note!* There is a limit of 999 parties on a case.

*Note!* There is an assumption that when creating the case, My Party is the Plaintiff. Change the Party Type as needed. Other parties are assumed to be the Defendant. Change the Party Type as needed.

The screenshot shows the "Case Initiation: SMALL CLAIM - MONEY JUDGMENT" form. Fields include: Filer Reference No (text), County \* (dropdown), Case Title \* (text), and Prayer Amount (text). Below are buttons for "Add My Parties" and "Add Other Parties". A table lists participants with columns for Participant Name, Role, and Attorney(s) for Party. One participant is listed: TEST FILER16, Plaintiff. At the bottom are buttons for "Back", "Save to Draft", and "Next".

Participant Name	Role	Attorney(s) for Party
TEST FILER16	Plaintiff	

5. Click **Next**.



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1. Select a **Document Category** for the type of document to be added to the case.  
*Note!* If unsure of what category to select, leave this field blank.
2. Select a **Document Type**.  
*Note!* Type the name of the document in this field to locate the **Document Type**.

*Note!* Additional Text – This additional text helps the clerk, judge, or other participants understand more about the document.

A screenshot of a web form. The "Document Category" and "Document Type" dropdown menus are highlighted with a red rectangular border. Below them is an "Additional Text" text input field. At the bottom of the form, there are three checkboxes: "Sealed", "Confidential", and "Electronic Presentation". Below the checkboxes is the text "Acceptable File Format Type(s) (\*.pdf)".

3. If applicable, **Check the appropriate checkbox** associated with this document.

*Note!* These are subject to the courts approval.

*Sealed* – requests the document to be sealed, if not already automatically sealed. This option will identify to the clerk that the filer believes the security setting should be higher than public. The court will make the final decisions on the actual security setting for the document.

*Electronic Presentation* – This does not need to be checked for any Proposed Documents. Those will automatically be presented to the judge. This field should be checked for any document which the judge has requested or which is presented for a judge’s signature before filing. In Camera documents need to have the Electronic Presentation checkbox selected.

*Note!* It is the eFiler’s responsibility to ensure, according to the Chapter 16 rules, that protected information is omitted or redacted from documents before the documents are filed. The clerk of court will not review filings to determine whether appropriate omissions or redactions have been made. Once a redacted document is submitted, the eFiling system will elevate the security level on the original document to prevent the protected information is not visible to the public.

When filing redacted versions, eFiler’s are also responsible for submitting the Protected Information Form (located on the Judicial Branch website) with the key to the redacted information.

*Note!* When filing Redacted documents, select Redaction as the Document Category and Type.



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4. Click **Browse**.
5. Locate the document (not illustrated).
6. Click **Save** (not illustrated).
7. Click **Add**.

**Case Sub Type : SMALL CLAIM - MONEY JUDGMENT**

Document Category -- select a Document Category --

Document Type \* -- select a Document Type --

Additional Text

Sealed  Confidential  Electronic Presentation

Acceptable File Format Type(s) (\*.pdf)

Document Location  **Browse...** **Add**

Add to Submission

Document Name	View Document	Edit Data	Size	Remove
Case Data	form.xml		0.01 MB	
SMALL CLAIMS ORIGINAL NOTICE	Sample_PDF.pdf		0.08 MB	
			Total Size:	0.08 MB

**Back** **Move to Draft** **Next**

8. Click **Next**.

**Important!** Click the file name to open and review the document prior to submitting.

**Optional!** If a document has been added in error, click the icon in the Remove column to delete the document.

**Note!** Once the case has been submitted through the EDMS system, each document will receive the Date and Time Stamp.

**Note!** There is a 10 MB limit per document. Multiple documents can be submitted per case. Each case has a total size limit of 16 MB. Documents that exceed 10 MB may be submitted in parts to meet the size requirements. Select the category of Attachments to add parceled documents.

**Note!** Click **Move to Draft** to save this filing to complete at a later time.

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- Review the filing information. Verify the information (**Case Data, Documents**) that have been added to the case.
- Click **Add Real Estate** to add physical land/residence to a case, if applicable.
- Enter in any **Special Filing Instructions for the Clerk**.
- Click **Enter Payment Information**.

The screenshot shows a web interface for filing a case. At the top left is a checkbox for "Emergency". Below it is a section for "Generated Case Data" with a "Change Case Data" button and a "View Data" link. The "Document(s) to be Submitted:" section contains a table with one entry: "PETITION" with a "View Document" link pointing to "Sample\_PDF.pdf". Below this is a section for "New Properties" with a red-bordered "Add Real Estate" button. A text area for "Special Filing Instructions for the Clerk:" is empty. The "Payment Method:" section includes a dropdown menu, a "Payment in behalf of:" dropdown, and several radio button options with explanatory text: "Pay by Credit Card or Check" (Estimated Fees: \$185.00), "No fees for this filing" (There are no fees associated with this filing - i.e. Probate Estate Petition), "Multiple Adoptions" (Multiple Adoptions being filed at the same time - IA Code Section 602.8105(1)), "Order granting exemption" (An order was issued granting exemption from the filing fee.), "Pay at Counter" (Non Credit Card Payments), and "Small Claims FED/MJ" (Small Claims Forcible Entry and Detainer and Money Judgment filed together - IA Code Section 648.19(3)). At the bottom are buttons for "Back", "Cancel (Delete)", "Move to Draft", and "Submit the Filing".

- Complete the information for paying by credit card or select other payment options. Insert the following required fields: **Payment Method, Credit Card No., Expiration Date, Cardholder's Name, Security Code**, and verify the mailing address.

The screenshot shows a form titled "Select a Payment Method" with a sub-section "Enter a new card". It contains a table with the following data:

Payment Method	Credit Card No.	Expiration Date	Cardholder's Name	Security Code	Street Address	Zip Code
MasterCard		04 2012	Test Filer16		123 1st Ave.	50319

Below the table are buttons for "Back" and "Set Payment Method". A red arrow points to the "Set Payment Method" button.

- Click **Set Payment Method**.
- From the drop-down menu, select the party to whom payment is entered.





## Existing Case

After a case has been created or converted to electronic format, a registered party can file subsequent data to that case.

*Note!* Prepare documents prior to accessing an existing case.

## Searching for an Existing Case

1. Click **Existing Case**.

Home	eFile	Cases	My Profile	Log Out
Home				
New Case	File new case			
<b>Existing Case</b>	File subsequent document to existing case			
Filing Status	Check the status of my filings			
My Cases	List of my ECF cases			
Notifications	(40)	Review your Notifications		

2. Select appropriate **County**.
3. Enter in **Case Number**.
4. Enter in **Participant's Last Name**.
5. Click **Submit**.

**Existing Cases**

Select county and type in a case number and participant name

County	Story
Case Number (Ex: SCSC126139) :	<input type="text"/>
Participant's Last Name:	<input type="text"/>
<input type="button" value="Submit"/>	

Or, select a recent case, filter all your cases. Number of cases displayed per page: 50

Case Title	Case Number	Case Type	County
SMALL CLAIMS TEST 4	SCSC126227	SMALL CLAIM - FORCIBLE ENTRY	Black Hawk
JONES VS SMITH	SCSC047248	SMALL CLAIM - FORCIBLE ENTRY	Story

*Note!* For those cases that you are a registered party to the case, click **Search My Cases** to locate a case not displayed on the page.

*Note!* Recent cases that have been submitted will display at the bottom the Existing Case screen.





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## Filing Status

After a case has been submitted, a filing status will be assigned. Listed below are the filing status and definitions.

*Sent* – Documents and data have been transmitted to the Clerk Review system.

*Received* – Documents and data have been received by the Clerk Review system and the filing time has been recorded.

*Filed* – A clerk has reviewed your information and returned an electronic receipt of the results. If the submission contains only a Proposed Order, the status of *Filed* indicates that the Proposed Order has been transferred to the judge for action. It does not mean that any official action has actually been taken.

**Note!** For proposed orders, *Filed* does not mean that the order has been accepted. A status of *Filed* means only that the court has received and recorded the filing. The judge still must take action on it.

*Awaiting Approval* – The submission is awaiting approval. The court clerk has not yet reviewed and approved the filing.

*Return Not Filed* – Submission was not accepted and returned to the eFiler. Click the Resubmit button to create a new submission based on the previous submission. The potential new submission will include links to the documents from the returned submission.

*Resubmitted* – This filing has been resubmitted.

*Package Pending* – Documents and data are being prepared in an electronic package to be sent to the Court's Clerk Review system.

*Packaged* – the submission is prepared and sent for clerk review.

*Accepted* – Clerk has approved submission, and it is being processed.

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## Filing Status

1. From the eFile menu, select **Filing Status**, or click **Filing Status** on the home page.



2. Enter the date of the filing in the **search fields**.
3. Enter additional fields as necessary.
4. Click **Go**.



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5. To review the Filing Status, click the **Status Field**.

**Note!** The status may take a few minutes to update. Refresh the status page to see the status of the submission change. When it reaches Awaiting Approval this means it has a time stamp, payment is processed, and the submission is waiting to be recorded. When the submission has completed all the steps at the court the submission will have a Filed status.

My Filings Between 11/12/2010 and 11/16/10							
Delete							
Filing ID	Client #	Court Case #	County	Date Submitted	Document Type	Status	
7434		SCSC126208	Black Hawk	11-12-2010:07:34:10 AM	RESTITUTION REPORT	Filed	
7644		CVCV045083	Story	11-10-2010:02:50:21 PM	PETITION	Filed	
7643		CNCN001393	Story	11-10-2010:02:47:14 PM	PETITION	Filed	
7642		AGCR042086	Story	11-10-2010:02:41:57 PM	TRAFFIC TICKET FILING	Filed	
7633			Story	11-09-2010:07:20:55 PM	PETITION FOR INTERVENTION	Awaiting Approval	
7632		SCSC126139	Black Hawk	11-09-2010:06:53:46 PM	APPLICATION TO CONDEMN	Awaiting Approval	
7535			Story	11-09-2010:06:44:32 PM	PETITION	Awaiting Approval	
7631		FECR153398	Black Hawk	11-09-2010:06:16:31 PM	CRIMINAL COMPLAINT	Filed	
7627		ESPR056823	Black Hawk	11-09-2010:11:53:47 AM	APPLICATION TO CONDEMN	Filed	

**Note!** No matter what the filing status is, eFilers should review the Filing Status to check for any notes from the Clerk of Court in regard to the submission.

**Note!** Whenever a civil case or a small claim (not subject to Certified Mail Service) has been filed the Original Notice is signed and returned by the clerk so this document can be served on the defendants established on the case. For small claims, in addition to the signed Original Notice the system will generate an Answer and Appearance document which must be served with the Original Notice.

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- Once the filing has been filed, a **Printable Receipt** will be available.
- At the bottom of the status details page the documents and actual file names will be displayed. Click the **File Name** in the View Document column to open the document.

SMALL CLAIMS ORIGINAL NOTICE    EDMS Issue Reporting Form.pdf  
VERIFICATION OF ACCT HAS BEEN FILED    Steps to start scanning in Story.pdf

Response:  
[View Printable Receipt](#)

Response	
Description:	Receipt
Author:	System Administrator
Return addresses: Email:	Filing: http://edmstest/runit
Document Name	View Document
SMALL CLAIMS ORIGINAL NOTICE	<a href="#">generated.pdf</a>
Main Document	<a href="#">receipt.html</a>
VERIFICATION OF ACCT HAS BEEN FILED	<a href="#">Steps to start scanning in Story.pdf</a>
SMALL CLAIMS APPEARANCE AND ANSWER FORM	<a href="#">generated(2).pdf</a>
Form	<a href="#">form.xml</a>

[Back](#)

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## Resubmit a Returned Filing

If a filing has been returned for clarification by the Clerk of Court, it will be returned to the eFiler. These filings can be resubmitted. When a filing is returned, it will be assigned a status of Returned Not Filed. A resubmit button will appear next to the filing, allowing the eFiler to change what was in error by either deleting the document in question or correcting the information entered.

**Note!** If a submission is Returned Not filed, the receipt will include a reason field. Although some reasons are entered automatically by the system, for example, if one of the documents contained a virus, the clerk will provide a reason for the returned filing.

1. Click **Filing Status** from the homepage.



2. Enter in search data to locate the case. For example, the date range the case was submitted. Click **Go**.



3. Locate the filing marked as **Returned Not Filed** in the Status column. Click **Resubmit**.

My Filings Between 12/23/2010 and 12/29/2010						
Filing ID	Client #	Court Case #	County	Date Submitted	Document Type	Status
8066			Black Hawk	12-23-2010:09:27:19 AM	SMALL CLAIMS ORIGINAL NOTICE	Returned Not Filed
8042		CNCV105374	Black Hawk	12-23-2010:09:26:36 AM	PROPOSED OTHER DECREE	Filed

4. This will open a new filing, copying the data from the original filing, but it will allow the eFiler to make adjustments to the case data, documents, and other pertinent information. Make changes as needed and complete the filing (not illustrated).



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## Draft Filings

If at any time (prior to final submission) a case can be saved as a draft to complete at a different time. Draft filings can be accessed via the eFile menu, Draft Filings.

From the eFile menu, click **Draft Filings** to access any cases saved as drafts.



When creating a case, click **Move to Draft** to save a case without submitting it to the clerk’s office. Cases that have been moved to draft will be available via the **Draft Filings** in the eFile menu illustrated above.



**Note!** Draft filings remain in the eFiling system for 90 days. A **Days until Deletion** column displays the days remaining to file on the case.

**Note!** Click the checkbox in front of a Draft Filing and click **Delete** to permanently remove the filing.

**Draft Filings**

Delete

<input type="checkbox"/>	Filing ID	Client #	Court Case #	Filing Description	Create Date	Days Until Deletion
<input type="checkbox"/>	7887		SCSC126208	SMALL CLAIM - MONEY JUDGMENT	12-06-2010:04:08:33 PM	69
<input type="checkbox"/>	7839		SCSC126232	SMALL CLAIM - MONEY JUDGMENT	11-30-2010:03:37:49 PM	63
<input type="checkbox"/>	7438	324		ADOPTION	11-01-2010:03:32:33 PM	34
<input type="checkbox"/>	7358			CIVIL - OTHER ACTIONS	10-26-2010:10:41:23 AM	28
<input type="checkbox"/>	7355		SCSC126208	SMALL CLAIM - MONEY JUDGMENT	10-25-2010:02:12:20 PM	27
<input type="checkbox"/>	7306			AGGRAVATED MISDEMEANOR - DRIVING WHILE BARRED	10-22-2010:03:08:51 PM	24
<input type="checkbox"/>	7217		SCSC126208	SMALL CLAIM - MONEY JUDGMENT	10-12-2010:09:12:25 PM	14
<input type="checkbox"/>	7182			CIVIL - ADMINISTRATIVE APPEAL	10-11-2010:07:04:55 PM	13



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## Cases Menu

Three options are available in the Cases menu – My Cases, Notifications, and Filing Charges.

### My Cases

When a case is initiated or a follow-up has been filed, even if it is just a notification, the case number is added to the My Cases for those that matching the username of the registered eFiler.

1. Select **My Cases** from the Cases menu or click the My Cases button from the home screen.



2. Click on the **Case Number** to access the case information and documents (if available).



**Note!** Dependent upon the eFiler’s role and the case level security settings the case documents may be available for downloading within My Cases listing.



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- The case information will display in a separate window. Review any information that has been submitted on the case.

<b>Case Number: LNCV105353 Case Title: DUMP TRUCK VS. BOB THE BUILDER</b>	
Opened: 12-06-2010	
County: Black Hawk	
Case Type: Mechanic's	Status: Active Judge:
Prayer Amount: \$.00	
<input type="checkbox"/> Show/Hide Participants	
File Date	Case History
12-06-2010 01:57:16 PM Plaintiff	MECHANICS LIEN FILING Filed by: TEST FILER16

- Click on **Service List** to display the service list notification generated by the system.

Case Title	Case Number	Case Type	Judge	County	Certificate	Inactive	
<input type="checkbox"/> TEST FILER 1 VS. TINKER BELL	SCSC126255	SMALL CLAIM - MONEY JUDGMENT		Black Hawk	Service List	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> HULK VS. CAPTAIN AMERICA	SCSC126244	SMALL CLAIM - MONEY JUDGMENT		Black Hawk	Service List	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> CATWOMAN VS.		SMALL CLAIM - MONEY		Black		<input type="checkbox"/>	<input type="checkbox"/>

**Service List**

The electronic filing system has served the following people:

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**Service List RE: SCSC126208**

**Case Number:** SCSC126208  
**Judge:**  
**Court:** TRIAL COURT  
 Black Hawk  
**Case Title:** SMITH VS JONES

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This certificate was automatically generated by the courts auto-notification system.  
**Date Generated:** 12-27-2010:14:49:43

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**I hereby certify that on 12-27-2010, I electronically filed the foregoing with the Clerk of the Court by using the ECF system which will send a notice of electronic filing to the following:**

DANIEL BRAY  
 TERRY FOX  
 JENNIFER BENNETT

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**Note:** The rules define the clerk of court as responsible for service of court-generated documents. Additionally on small claims cases that by statute can be served by certified mail, when the filer has selected and paid for certified mail in the electronic filing system or at the clerk of court office, the clerk of court is responsible for service of the original notice and answer and appearance by certified mail in accordance with the Code of Iowa.





# eFile Training – User Guide

## Page Display

The page display defaults to 50 cases displayed per page. Select a different setting from the drop-down menu as desired.

My Cases

Number of cases displayed per page: 50

Case Number	County	Participant's Last Name
	Black Hawk	

History Service List

Ex: SCSC126139

Search My Cases

Show Active Show Inactive Show Both Delete

Case Title	Case Number	Case Type	Judge	County	Certificate	Inactive
STATE VS GREY	SMCR153373	Drugs (State)		Black Hawk	Service List	

## Search Fields

Utilize the searchable fields to locate non-confidential cases that are not displayed in the My Cases listing.

1. Click **Search My Cases**.

My Cases

Number of cases displayed per page: 50

Case Number	County	Participant's Last Name
	Black Hawk	

History Service List

Ex: SCSC126139

Search My Cases

Show Active Show Inactive Show Both Delete

Case Title	Case Number	Case Type	Judge	County	Certificate	Inactive
STATE VS GREY	SMCR153373	Drugs (State)		Black Hawk	Service List	

2. Enter in the **Case Title** and **Case Number**.

Search Cases

Number of cases displayed per page: 50

Search by:

Enter a part of the case title or complete case numbers as search criteria. If you leave the right case number field blank but enter a case number into the left field, all case numbers greater than or equal to the case number entered will be returned. If you leave the left case number field blank but enter a case number into the right field, all case numbers less than or equal to the case number entered will be returned.

Case Title:

Case Number: (Ex: SCSC126139)  to

Search All My Cases

Show Active Show Inactive Show Both Delete

There are no cases on record for you.

3. Click **Search**.



## Inactive Cases

Mark cases as Inactive to remove them from the My Cases display. This does not delete them, simply hides them from the Active view. Remove the Inactive status to return the case to the Active view. For those registered participants of the case, electronic notifications will still be received on Inactive status cases.

1. To inactivate a case, **click the checkbox** in the Inactive column.

My Cases Number of cases displayed per page: 50

Case Number	County	Participant's Last Name	History	Service List
	Black Hawk			

Ex: SCSC126139

Search My Cases 
 Show Active
  Show Inactive
  Show Both

Case Title	Case Number	Case Type	Judge	County	Certificate	Inactive	
STATE VS GREY	SMCR153373	Drugs (State)		Black Hawk	Service List	<input checked="" type="checkbox"/>	<input type="checkbox"/>
TEST OF ORIGINAL NOTICE	SCSC126232	SMALL CLAIM - MONEY JUDGMENT		Black Hawk	Service List	<input type="checkbox"/>	<input type="checkbox"/>
SMITH VS JONES	SCSC126208	SMALL CLAIM - MONEY JUDGMENT		Black Hawk	Service List	<input type="checkbox"/>	<input type="checkbox"/>
SMITH VS SOMEBODY	SCSC126202	SMALL CLAIM - MONEY JUDGMENT		Black Hawk	Service List	<input type="checkbox"/>	<input type="checkbox"/>
JOHNSON VS BOSIER	SCSC126139	SMALL CLAIM - MONEY JUDGMENT		Black Hawk	Service List	<input type="checkbox"/>	<input type="checkbox"/>
TESTING REDACTION OF ANOTHER'S FILINGS	LACV105354	CIVIL LAW - PERSONAL INJURY - MEDICAL/DENTAL MALPRACTICE		Black Hawk	Service List	<input type="checkbox"/>	<input type="checkbox"/>

2. This marks the case as Inactive and removes it from the view, but does not delete the case. To view inactive cases, click the **Show Inactive** button.

Ex: SCSC126139

Search My Cases 
 Show Active
  Show Inactive
  Show Both

Case Title	Case Number	Case Type	Judge	County	Certificate	Inactive	
NANCY'S TEST	SCSC126233	AUTO ACCIDENT		Black Hawk	Service List	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SMITH VS JONES	SCSC126208	SMALL CLAIM - MONEY JUDGMENT		Black Hawk	Service List	<input checked="" type="checkbox"/>	<input type="checkbox"/>
BOB VS (I CANT BELIEVE HE ET (IT) ALL) BOSIER	SCSC126137	SMALL CLAIM - MONEY JUDGMENT		Black Hawk	Service List	<input checked="" type="checkbox"/>	<input type="checkbox"/>

3. To reactivate a case, **uncheck** the Inactive button. This moves the case back to the Active status.

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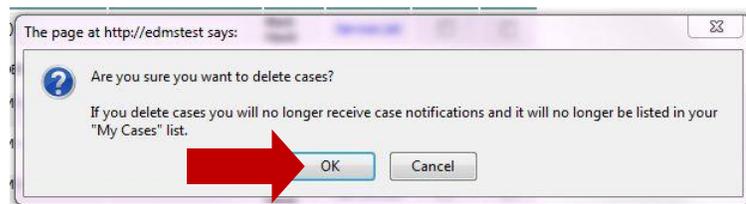
## Delete a Case

For those cases where the eFiler is no longer a participant, the case has been dismissed, or for some other reason, click the check box under the Delete column and click the Delete button. If a case is deleted from My Cases view, the registered participants will no longer receive notifications on this case.

1. Click the checkbox in the Delete column.
2. Click **Delete**.



3. A confirmation window will appear. Click **OK** to delete the case from the view.



**Note!** Deleting a case from the My Cases view, does not delete the case from the court server, just deleted from the eFiler's account. Cases can be re-added if the need arises.

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## Notifications

A Notice of Electronic Filing or Presentation (NEF) means that the eFiler will not receive a paper copy of the documents eFiled or presented by another filer to the court and previously sent to the participant and recorded in the certificate of service.

A Courtesy Notification means a paper document was submitted to the court and the clerk scanned the documents into electronic format to be recorded. Copies of these scanned documents are included in the courtesy notification.

Once a registered party has eFiled on a case and been added as a party to that case by the clerk of court, the case number is stored in a database and the username is associated with that case. When another party sends a follow-up submission on any case that has a username associated with it, an email and the notification list will be updated with the submission information.

Notifications generally go out immediately, or before the clerk reviews and records the information and documents in the submission. When a notification is Returned Not Filed and update to the notification status is set so that other parties on the case can look at the notification status to see if such a condition occurred. Some notifications do not occur until after the clerk has reviewed and recorded the information. This generally occurs when a judge submits an order to be filed.

1. Click **Notifications** from the home screen or via the Cases menu.



**Note!** Next to the notifications button on the home page there will be a number in parentheses (xx). This number represents the number of notifications not accessed and does not include the notifications already accessed.

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# eFile Training – User Guide

- Notifications will be displayed. Those that are not read will appear in bold. Click the **Notification Name** to open the Notice of Electronic Filing (NEF).

**Notifications**

**Notifications for Marsha Fox**

Delete   Mark As Read   Mark As Unread

<input type="checkbox"/>	Document(s) filed by...	Case Title	Case Number	County	File Date
<input type="checkbox"/>	<b>PROPOSED JURY INSTRUCTIONS was filed by or in behalf of Marsha Fox</b>	SMITH VS JONES	SCSC126208	Black Hawk	12-19-2010
	Documents: PROPOSED JURY INSTRUCTIONS				
<input type="checkbox"/>	<b>ORDER AFTER EVALUATION was filed by or in behalf of Marsha Fox</b>	SMITH VS JONES	SCSC126208	Black Hawk	12-15-2010
	Documents: ORDER AFTER EVALUATION				
<input type="checkbox"/>	<b>ORDER FOR CONTINUANCE was filed by or in behalf of Alan Pearson</b>	JOHNSON VS BOSIER	SCSC126139	Black Hawk	12-15-2010
	Documents: ORDER FOR CONTINUANCE				
<input type="checkbox"/>	<b>PETITION was filed by or in behalf of Marsha Fox</b>	STATE VS GREY	SMCR153373	Black Hawk	12-13-2010
	Documents: PETITION				
<input type="checkbox"/>	<b>ANSWER was filed by or in behalf of Marsha Fox</b>	SMITH VS JONES	SCSC126208	Black Hawk	12-06-2010
	Documents: ANSWER APPEARANCE				
<input type="checkbox"/>	BRIEF was filed by or in behalf of Marsha Fox	SMITH VS JONES	SCSC126208	Black Hawk	11-29-2010
	Documents: BRIEF				

*Note!* Click the Document Name to review the document that was submitted to the case.

*Note!* Notifications are not permanent. Currently the time limit is set to 90 days, but it can change. The court will determine this time period.

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# eFile Training – User Guide

- The NEF will display. The NEF will also be sent to the registered email account for registered filers.



\*\*\*\*\* IMPORTANT NOTICE - READ THIS INFORMATION \*\*\*\*\*  
NOTICE OF ELECTRONIC FILING OR PRESENTATION [NEF]

A filing has been submitted to the court RE: SMCR153373  
**Judge:**

**Official File Stamp:** 12-13-2010:08:22:02  
**Court:** TRIAL COURT  
Black Hawk  
**Case Title:** STATE VS GREY  
**Document(s) Submitted:** PETITION  
**Filed by or in behalf of:** Marsha Fox

You may review this filing by clicking on the following link to take you to your [cases](#).

This notice was automatically generated by the courts auto-notification system.

The electronic filing system has served the following people:  
TERRY ROY FOX

The moving party or the individual who filed this document is responsible for serving the following people in accordance with Iowa Code and Iowa Court Rules, including Chapter 16 Rules Pertaining to the Use of the Electronic Document Management System\*:  
JESSICA LYNN ARMSTRONG  
WANDA JAMES  
STATE OF IOWA

**Note!** Check the SPAM filters for the registered email account if NEFs are not received.

**Note!** Follow the standard paper process whenever necessary to notify parties. The courtesy notifications are not a replacement for the paper notices.

- To delete notifications, **select the checkbox** for the NEF and click **Delete**.



**Note!** Select Mark as Read or Mark as Unread to change the status of each NEF.



# eFile Training – User Guide

## Filing Charges

For each case that requires a Filing fee and is paid online through the eFile system will display in the Filing Charges window. The current month is displayed by default. Select a month from the Report Month drop-down menu to change the view.

1. Select **Filing Charges** from the Cases menu.



2. Filing Charges for the current month will display. Change the month drop down to view previous month's charges.

Filing Charges									
Report Month		September							
September 2010 Charges for Marsha Fox									
Case Title	Client #	Court Case #	County	Description	Date	Account	Authorization Code	Fee	
ANOTHER NEW CASE		ATCV105219	Black Hawk	ADOPTION	09-10-2010:02:52		2	\$100.00	
SMITH VS SOMEBODY		SCSC126202	Black Hawk	SMALL CLAIM - MONEY JUDGMENT	09-10-2010:03:30		2	\$85.00	
STATE VS CLAUS		DACV105225	Black Hawk	DOMESTIC ABUSE - DOMESTIC ABUSE JUVENILE	09-16-2010:10:44		5	\$185.00	
TEST		CNCV105277	Black Hawk	CHANGE OF NAME	09-17-2010:04:44		5	\$185.00	
IN THE MATTER OF LINDSEY LOHAN		JVJV013506	Black Hawk	JUVENILE - CHILD IN NEED OF ASSISTANCE	09-27-2010:11:28		1	\$185.00	
SMITH VS JONES		SCSC126208	Black Hawk	SMALL CLAIM - MONEY JUDGMENT	09-28-2010:01:06		2	\$115.00	
							<b>Total Charges:</b>		<b>\$855.00</b>

**Note!** For those Filing Charges that are paid directly to the clerk, they will not appear within the eFile system.

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## My Profile Menu

The My Profile allows eFilers to edit profile information, change their log in password, and review log in history.

## My Profile

1. Click **My Profile**, from the My Profile menu.



2. The **User Profile** information will be displayed. Click the desired action button.





## Modify User Profile

1. **Edit details of the profile** such as notifications status or other basic information (address, phone number, email, etc) provided during registration.
2. Click **Submit** to accept changes.

Email Notification :

- Do NOT email me status updates for received filings
- Do NOT email me status updates for approved filings
- Do NOT email me status updates for partially approved filings
- Do NOT email me status updates for returned filings

**\*Required Fields**

User Name: Filer1

Title:

First Name:

Middle Name:

Last Name: \*

Suffix Name:

Organization: Pro Se

ICIS ID: MSTR00001141

Phone:  Fax:

Email: \*

Confirm EMail: \*

1st Alternate EMail:

2nd Alternate EMail:

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Use My Company's Address

Use My Address

Address Line 1: \*

Address Line 2:

Address Line 3:

City: \*  State:

Postal Code: \*  Country:

## Notes

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## Change Password

Passwords can be changed at any time. Passwords need to be 4 characters in length.

1. Enter current password.
2. Enter new password and confirm new password.
3. Click **Submit**.

*Note!* Click the link on the Login screen if a password has been forgotten to assign a temporary password. After logging on with a temporary password, the password will need to be reset.

*Note!* Passwords can be reused.

## Upload Signature

eFilers can upload an actual scanned signature from a file to their profile.

1. Complete signature fields (not required).
2. Click **Browse** to locate the signature file.
3. Click **Upload Signature**.

## Notes

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## Select Gatekeeper

A gatekeeper can be assigned to entries in the action queues that are meant to be reviewed by the registered eFiler. The gatekeeper will review these items and either assign them to the registered eFiler to review or finish the review process.

1. Select **Company Name**.
2. Select the **Gatekeeper**.
3. Click **Save Gatekeeper**.

**Select Gatekeeper**

The gatekeeper will be assigned entries in the action queues that are meant to be reviewed by you. The gatekeeper will review these items and either assign them for you to review or finish the reviewal process and await your signature.

Company: All    Gatekeeper: None

Save Gatekeeper    Cancel

## Withdraw from EDMS

Registered eFilers can select to withdraw a registration in the Iowa Electronic Document Management System. This action will cancel the login and password and remove the eFiler from the applicable electronic service lists and case histories will no longer be available.

The page at <http://edmstest> says:

Note: You have selected to withdraw your registration in the Iowa Electronic Document Management System. If you complete this action, your login and password will be canceled, your name will be deleted from all applicable electronic service lists, and your case histories will no longer be available to you. Do you wish to proceed?

OK    Cancel

## Associate to Case

Allows an eFiler to search for cases and request to be associated to that case. If the eFiler has already been identified as a represented party this action is immediate. If not associated, this request will be reviewed by the Clerk of Court's office.

**Associate me to a Case**

County: Black Hawk

Case #

Party ID #

Cancel    Submit

