

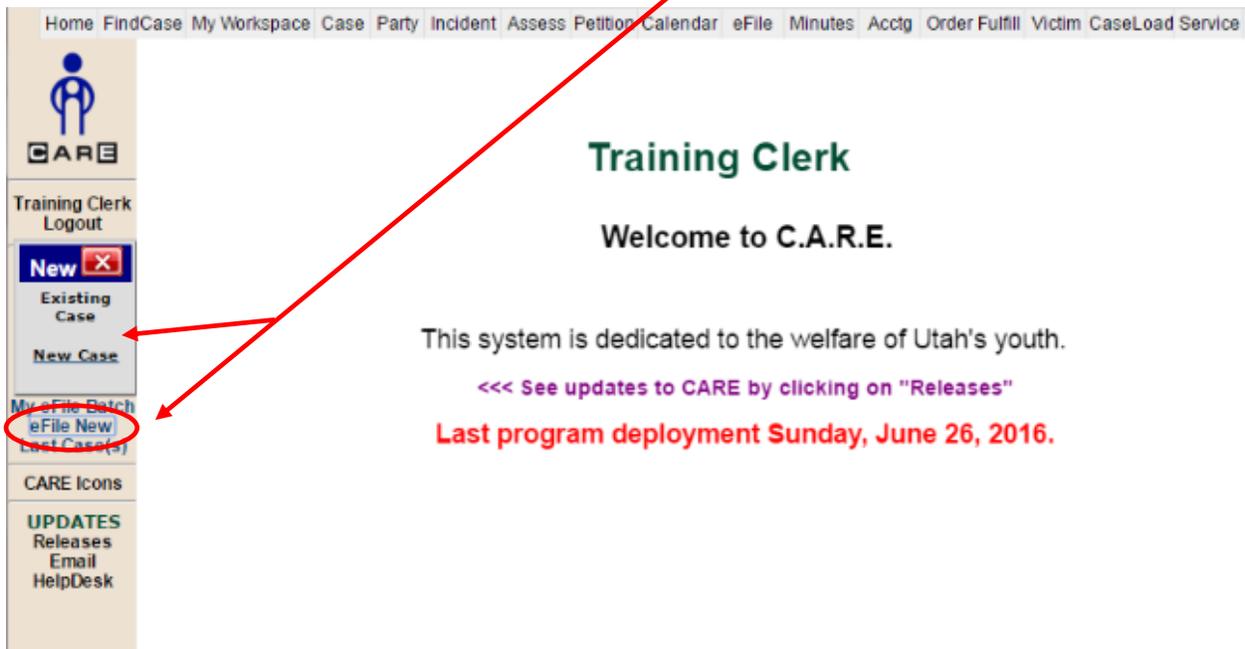
How Do I – Clerical Case/Incident Creation

Phase II eFiling

In the Phase II of eFiling, clerks will need to create certain case types for self-represented litigants using the left-side menu link, “eFile New.” Those case types are:

- Adoptions
- Substantiations
- Protective Orders
- Judicial Bypass (Abortion)

These cases **cannot be created through the incident screen** once we are in Phase II. In order to create any of the above case types, you will select the “eFile New” link on the left-side menu. This opens a small window, select “New Case.”



In the following window, you will need to fill in all required text fields. Once you select the Home District Office, the following county options will be filtered to only show those available for that district office. If race or ethnicity are unknown, you may select, "Cannot determine."

Save Case **Close**

All fields with (*) are required.

eFile Case ID	[NEW]	Home District Office *	<input type="text"/>
First Name *	<input type="text"/>	Street Address *	<input type="text"/>
Middle Name	<input type="text"/>	Apt/PO Box/Suite	<input type="text"/>
Last Name *	<input type="text"/>	City *	<input type="text"/>
Date of Birth *	<input type="text"/>	State *	Utah <input type="text"/>
Gender *	Unknown <input type="text"/>	Zip *	<input type="text"/>
Phone *	0000000000	County *	<input type="text"/>
Race *	<input type="text"/>		
Ethnicity *	<input type="text"/>		

Height (ft. in.) Weight (lbs.)

Select a Document Type you are eFiling.

Document Type * No Document Type Selected

The Document Types listed will only include document types that would require a new incident.

<https://juvenile.utcourts.gov/efiling/EfileBatchCaseEdit?mode=new&areaNot>

Save Case

eFile Case ID	Adoption	fields with (*) are required.
First Name *	Custody Petition	Home District Office *
Middle Name	Emancipation Petition	Street Address *
Last Name *	Expedited PSS Petition	Apt/PO Box/Suite
Date of Birth *	Expungement Petition	City *
Gender *	Information Filed	State *
Phone *	Judicial Bypass (Abortion)	Zip *
Race *	Motion for Expedited Placement	County *
Ethnicity *	Order to Show Cause	
Height (ft. in.)	PSS Petition	Weight (lbs.)
Document Type *	Petition	Document Type you are eFiling.
	Petition for Protective Order	No Document Type Selected
	Petition to Marry	
	Probation Record Shared	
	Restoration Term Parent Rights	
	Shelter Request	
	Substantiations	
	Termination of Parental Rights	
	Voluntary Relinquishment	

Once you have entered the necessary information, it will take you to the eFile Batch Detail screen where you can add the new incident and associated paperwork.

Click on the green “plus” sign. (Please note, there is not an “eFile” button available on this screen. That button does not become viewable until all information and documents have been entered. Click on “view error messages” to see what needs to be completed.)

eFile Batch Detail

eFile Batch Id 2174 eFile User Training Clerk ▼ Status Incomplete
Created By training10 Created DateTime 06-14-2016 03:55:08 PM Alert Date
Note Create New Case Record from myCases

Case Info [Create New Case](#)

Edit	Case #	Case Name	District Office	Incident(s)	Edit/Add New Inc Remove
	New Case	Test Clerical Testing	American Fork	INCIDENT(S) REQUIRED Use New Inc link.	

Party Info [Create New Party](#)

Document Info

Document ID 1779 Document Sub Type Adoption
Document Title Adoption Document Type Petition
INCOMPLETE DOCUMENT Add PDF Document

[Save](#) [Click to View Error Messages](#) [Go Back to Batch Lookup](#) [Delete](#)

The information you entered on the previous screen, will pre-fill the required fields such as: incident type, district office, county of offense, agency, incident description, and petitioner. If you need to change any of those fields, you can do that in this screen. If you have information pertinent to the other fields, please fill them in.

Add Incident To Case

eFile Case Inc Id [NEW]
 Name Test Clerical Testing

All Fields with (*) are required.

Choose Type Child Welfare

District Office* American Fork

County of Offense* UTAH

Agency* Juvenile Court

Incident Description* ADOPTION

PSS? Check if Yes

Intake Decision

Child Removal Date (MM-DD-YYYY)

Petitioner Private Petitioner

[Save Incident](#) [Cancel](#)

If you need to change any of the information you have entered on the case or the incident, click the appropriate "edit" icon.

eFile Batch Detail

eFile Batch Id 2174 eFile User Training Clerk

Created By training10 Created DateTime 06-14-2016 03:55:08 PM

Note Create New Case Record from myCases

Case Info [Create New Case](#)

Edit	Case #	Case Name	District Office	Incident(s)
	New Case	Test Clerical Testing	American Fork	 Inc

To edit Case Profile information

To edit incident information

Now, you will need to add your PDF document.

eFile Batch Detail

eFile Batch Id 2174 eFile User Training Clerk Status Incomplete
 Created By training10 Created DateTime 06-14-2016 03:55:08 PM Alert Date
 Note Create New Case Record from myCases

Case Info [Create New Case](#)

Edit	Case #	Case Name	District Office	Incident(s)	Edit/Add	New Inc	Remove
	New Case	Test Clerical Testing	American Fork			+	

Party Info [Create New Party](#)

Document Info

Document ID 1779 Document Sub Type Adoption
 Document Title Adoption Document Type Petition

INCOMPLETE DOCUMENT **Add PDF Document**

[Save](#) [Click to View Error Messages](#) [Go Back to Batch Lookup](#) [Delete](#)

In the next window, you will need to select your file. If the file is larger than 5 MB, you will need to break it up into multiple, smaller files.

Add PDF Document

Document must be PDF
 Maximum Document Upload Size 5 MB

Attach Additional PDF Document

File * No file chosen

[Attach PDF Document](#) [Cancel](#)

Please note, if you have multiple files that need to be uploaded, you will need to attach them prior to completing the eFiling process. You can add additional documents by clicking the icon at the bottom right-hand corner.

Document Sub Type Adoption
 Document Type Petition
 View PDF

[Go Back to Batch Lookup](#) [Delete](#) **Attach Additional Document to Existing**

Once you have attached all necessary documents and entered the case and incident information, click the eFile button. (Reminder: If there are items missing, the eFile button will not appear, please click the “View Error Messages” button.

eFile Batch Detail

eFile Batch Id	2174	eFile User	Training Clerk ▼	Status	Incomplete
Created By	training10	Created DateTime	06-14-2016 03:55:08 PM	Alert Date	
Note	Create New Case Record from myCases				

Case Info [Create New Case](#)

Edit	Case #	Case Name	District Office	Incident(s)	Edit/Add New Inc	Remove
	New Case	Test Clerical Testing	American Fork	Inc	+	

Party Info [Create New Party](#)

Document Info

Document ID	1779	Document Sub Type	Adoption
Document Title	<input type="text" value="Adoption"/>	Document Type	Petition
Filed/Created By	training10	View PDF	

[Save](#) [eFile](#) & Return to My eFiled ▼ [Go Back to Batch Lookup](#) [Delete](#)

[Click to View Error Messages](#)

This is the message that will appear if additional information is required prior to eFiling.

This filing will now appear in the queue with the status of “Create Info.” You will need to exit out of the “My eFiled” window and go into the queue to process the case further.

Find Close My eFiled

Status Case #

My eFiling Filed Last(10 Days) Open/Recent Updates Last(3 Days)

Filed Date Range
 Start
 End

Queue	Doc. SubType Title	Filed Date Filer	Hold Date	View Doc	Status	Completed Date Time Userid	Case # Incident(s) #	Notes
Create Info	Adoption Adoption	06-14-2016 training10			Create Info		Test Clerical Testing (NEW) New Inc	
	Review Community Service Documentation test 9	09-18-2015 training10		View	New Filing			
	Order Orders test this	09-18-2015 training10		View	New Filing			
	Order Orders This is a copy and I am testing it.	09-18-2015 training10		View	New Filing			
	Order Orders Going to test this now	09-18-2015 training10		View	New Filing			
	Review Appeals test	09-11-2015 training10		View	New Filing		Sanford Sharpie (1004313) 46	
	Counsel Notice of Appearance Notice of Appearance	08-26-2015 training10		View	New Filing		Yogi Bear (999999)	

At this point, the case has not been assigned a case number and as it has not officially been created. Once in the eFile Queue, you can use the filter option by selecting “Create Info” from the Routing Queue or Status Queue drop-down options to only view those cases pending case/incident creation. Click on the “edit” icon on the left-hand side to continue processing the case.

Find Close eFile Queue

Routing Queue Create Info Case District** Case District Office**

Status Create Info Case # Document Type

Filer Judge Assigned Filed Date Start 06-06-2016 End 06-14-2016

Show Holds Filed Last(10 Days) Open/Recent Updates Last(3 Days) Assigned Status

Queue Sign/View ID	Document Sub Type Title	Filed Date Filer	Hold Date	View Doc	Linked Docs	Status	Case # Incident(s) #	Actions	Notes
	Create Info PSS Petition PSS Petition	06-14-2016 training10	Click to Add		Create Info	John Doe (NEW) New Inc	+		
	Create Info Adoption Adoption	06-14-2016 training10	Click to Add		Create Info	Test Clerical Testing (NEW) New Inc	+		
	Create Info Adoption Adoption	06-14-2016 otpuser	Click to Add		Create Info	testtest testtest (NEW) New Inc	+		
	Create Info PSS Petition test test	06-13-2016 ajan1	Click to Add		Create Info	Sanford Sharpie (1004313) 58 chuck brown (996092)	+		Add Assigned User BARishita 06-13-2016 01:57 PM - BARishita

Please note, that the case will be automatically assigned to you once you click “Create Info” in order to avoid two people entering information on a new case at the same time. Once the process is complete, you will still be assigned to the case unless you take yourself off of the case. In the next screen, click “Create New Case.”

eFile Manage New Information					
eFile Id	2689	Status	Create Info		
Filed By	training10	Submitted DateTime	06-14-2016 04:33:35 PM		
Note	Add Assigned User training10 06-14-2016 04:48 PM -...				
Case Info					
Create/Compare	Case #	Case Name	District Office	Incident(s)	Edit/Create
Create New Case	NEW CASE	Test Clerical Testing	American Fork	New Inc	
Party Info					
Document Info					
Document ID	2689	Document Sub Type	Adoption		
Document Title	Adoption	Document Type	Petition		
Filed/Created By	training10	View PDF			
Go Back to eFile Queue		Click to View Error Messages			

Once you have verified that the information is correct, click “Create Case & Incidents.”

All fields with (*) are required.			
Back	Create Case & Incidents	Close	
eFile Case ID	2798	Home District Office *	American Fork
First Name *	Test Clerical	Street Address *	14039 W Courthouse Way
Middle Name		Apt/PO Box/Suite	
Last Name *	Testing	City *	American Fork
Date of Birth *	06-07-2005	State *	Utah
Gender *	Female	Zip *	84003
Phone *	0000000000	County *	Utah
Race *	Can Not Determine		
Ethnicity *	Can Not Determine		
Height (ft. in.)	<input type="text"/> <input type="text"/>	Weight (lbs.)	<input type="text"/>

In the following screen, click on the red gavel to assign the Judicial Officer.

eFile Manage New Information					
eFile Id	2689	Status	Create Info		
Filed By	training10	Submitted DateTime	06-14-2016 04:33:35 PM		
Note	Add Assigned User training10 06-14-2016 04:48 PM -...				
Case Info					
Create/Compare	Case #	Case Name	District Office	Incident(s)	Edit/Create
	1103009 	Test Clerical Testing	American Fork	1	
Party Info					
Document Info					
Document ID	2689	Document Sub Type	Adoption		
Document Title	Adoption	Document Type	Petition		
Filed/Created By	training10	View PDF			
Go Back to eFile Queue		Update eFile and Route to Queue			

Select the type of Judicial Officer assignment and then select the Judge. If the Judge is not showing up on the list, click on "Find All Avail" to see a list of all Judges in the state.

Select a Judicial/Officer type for Assignment to Case	
Permanent Judge	<input checked="" type="radio"/>
Drug Court	<input type="radio"/>
Specialty Court	<input type="radio"/>
Commissioner	<input type="radio"/>
Next >>	Cancel

Select Judicial/Officer	
Name	
Bartholomew, Brent	
Bazzelle, Suchada	
Lindsay, Kay	
Noonan, Mary	
Sainsbury, Sterling	
Smith, F. Richards	
Find All Avail	Cancel

Now click “Update eFile and Route to Queue.” The case is not created and the documents have not been filed until you click that button.

eFile Manage New Information					
eFile Id	2689	Status	Create Info		
Filed By	training10	Submitted DateTime	06-14-2016 04:33:35 PM		
Note	Add Assigned User training10 06-14-2016 04:48 PM -...				
Case Info					
Create/Compare	Case #	Case Name	District Office	Incident(s)	Edit/Create
	1103009 	Test Clerical Testing	American Fork	1	
Party Info					
Document Info					
Document ID	2689	Document Sub Type	Adoption		
Document Title	Adoption	Document Type	Petition		
Filed/Created By	training10	View PDF			
Go Back to eFile Queue		Update eFile and Route to Queue			

The case is now available to view in the Review Queue. The case number and case name are now clickable links. If no further action is necessary (calendar, filing fee, etc.), select Click to Complete.”

Find Close eFile Queue

Routing Queue: Review Case District*: Fourth District Juvenile Court Case District Office*: []

Status: [] Case #: [] Document Type: []

Filer: [] Judge: Assigned Filed Date: Start 06-13-2016 End 06-16-2016

Show Holds Filed Last(10 Days) Open/Recent Updates Last(3 Days) Assigned Status: []

Queue	Document Sub Type	Filed Date	View Doc	Linked Docs	Status	Case #	Incident(s) #	Actions	Notes
Review	Memorandum in Support of Motion to Release Guardian Ad Litem <i>incident 236 doc test</i>	06-15-2016 SYSTEM_GAL	Click to Add	View	New Filing	Charlie Brown (775582)	236	Click to COMPLETE	
Review	Adoption Adoption	06-14-2016 training10	Click to Add	View	New Filing	Test Clerical Testing (1103009)	1	Click to COMPLETE	(Clerical & Filer Note) Case(s)/Incident(s) have been...
Review	Adoption test	06-14-2016 spappas1	Click to Add	View	New Filing	Charlie Brown (1103007)	1	Click to COMPLETE	(Filer Note) need to contact the courts to setup payment of...
Review	PSS Petition test	06-13-2016 spappas1	Click to Add	View	New Filing			Click to COMPLETE	(Clerical & Filer Note) Case(s)/Incident(s) have been...