

How Do I – Clerical Processing Incidents on Existing Cases

Phase II eFiling

In Phase II of eFiling, attorneys will create “pseudo” incidents that will later be verified by the clerical department. These new incidents will appear in the queue with the status of “**Create Info**,” just like the requests for new cases will. This document will walk you through creating a new incident on an existing case.

To process the new case, click on the “edit” icon on the left-hand side of the window. You can see it is an existing case because of the clickable name and case number on the right. (The case will be automatically assigned to you once you click the “Create Info” icon.)

The screenshot shows the 'eFile Queue' interface. At the top, there are buttons for 'Find' and 'Close'. Below them are search filters: 'Routing Queue' (set to 'Create Info'), 'Case District**' (Fourth District Juvenile Court), 'Case District Office**' (Fillmore), 'Status' (Create Info), 'Case #', 'Document Type', 'Filer', 'Judge' (Assigned), and 'Filed Date' (Start/End). There are also checkboxes for 'Show Holds', 'Filed Last(10 Days)', and 'Open/Recent Updates Last(3 Days)', and an 'Assigned Status' dropdown.

Queue Sign/View ID	Document Sub Type Title	Filed Date Filer	Hold Date	View Doc	Linked Docs	Status	Case # Incident(s) #	Actions
	Custody Petition Test Custody Petition Dulcinea Quixote	06-20-2016 training7	Click to Add			Create Info	Dulcinea Quixote (1103011) New Inc	
	Petition for Protective Order Petition for Protective Order	06-17-2016 mellefsen	Click to Add			Create Info	Missy Mouth (NEW) New Inc	

In the “eFile Manage New Information Screen,” you will need to review the PDF and document sub-type in order to verify that a new incident is necessary. Once you have verified the need for a new incident, click “create” and then “Process Create/Switch Incident(s).”

eFile Manage New Information					
eFile Id	2823	Status	Create Info		
Filed By	training7	Submitted DateTime	06-20-2016 09:08:05 AM		
Note	Add Assigned User training10 06-20-2016 09:10 AM -...				
Case Info					
Create/Compare	Case #	Case Name	District Office	Incident(s)	Edit/Create
	1103011	Dulcinea Quixote	Fillmore	New Inc	
Party Info					
Document Info					
Document ID	2823	Document Sub Type	Custody Petition		
Document Title	Test Custody Petition Dulcinea Quixote		Document Type	Petition	
Filed/Created By	training7	View PDF	<i>Verify document type</i>		
Go Back to eFile Queue		Return eFile	Click to View Error Messages		

This is the screen where you will either create the incident as prepared by the attorney or attach the document to an existing incident if you determined that the document does *not* require a new incident. (If the document did not require a new incident, click on the “Switch Incident” drop-down box and select the appropriate existing incident.)

Process Create/Switch Incident(s)		View All Case Incident(s)	Return
Name	Dulcinea Quixote		
eFile Inc#	Description	Create	Switch Incident
NEW	3399	CHILD WELFARE PROCEEDING	<input type="checkbox"/> <input type="text" value=""/>

OR

Once you have processed the new incident, the new incident number will be displayed in the “eFile Manage New Information” window. You will need to click “Update eFile and Route to Queue.”

eFile Manage New Information

eFile Id: 2823 Status: Create Info
 Filed By: training7 Submitted DateTime: 06-20-2016 09:08:05 AM
 Note: Add Assigned User training10 06-20-2016 09:10 AM -...

Case Info

Create/Compare	Case #	Case Name	District Office	Incident(s)	Edit/Create
	1103011	Dulcinea Quixote	Fillmore	3	

Party Info

Document Info

Document ID: 2823 Document Sub Type: Custody Petition
 Document Title: Test Custody Petition Dulcinea Quixote Document Type: Petition
 Filed/Created By: training7 View PDF

[Go Back to eFile Queue](#) [Update eFile and Route to Queue](#)

Once you have eFiled it and routed it to the queue, the new incident will appear in the "All Incident" screen.

[Find](#) [Create New C.W.](#) [Create New Del.](#)

Case: → Child Welfare or Delinquency: ▾ Display De

Name: Dulcinea Quixote Historic PO Assignment Link

Assigned Judge: K. Lindsay [Create C.W. Timeline](#)

ID	District Office	Incident Description	Offense Date	Intake / P.O.	Intake / CW Decision	Adjudicated / Closed
3	Fillmore	CHILD WELFARE PROCEEDING			Child Welfare	
2	Fillmore	TERMINATION OF PARENTAL RIGHTS			Petition	
1	Fillmore	TERMINATION OF PARENTAL RIGHTS			Child Welfare	

As the final step, you will need to go back to the queue and mark the new incident "complete."

eFile Queue

Find Close

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

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

Filer: [Input] Judge: Assigned Filed Date: Start 06-16-2016 End 06-20-2016

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

Queue Sign/View ID	Document Sub Type Title	Filed Date Filer	Hold Date	View Doc	Linked Docs	Status	Case # Incident(s) #	Actions	Notes
Review	Custody Petition Test Custody Petition Dulcinea Quixote	06-20-2016 training7	Click to Add	View	New Filing	Click to COMPLETE	Dulcinea Quixote 103011	+	(Clerical & Filer Note) Case (s)/Incident (s) have been...
Create Info	Petition for Protective Order Petition for Protective Order	06-17-2016 mellefsen	Click to Add		Create Info		Missy Mouth (NEW) New Inc	+	Add Assigned User mellefsen 06-17-2016 02:02 PM - mellefsen