

HOW DO I CREATE FIRM ASSIGNMENTS

NOTE: You will need to assign the case and party attorneys separately from assigning the firm.

To enter a new attorney or firm on a case click on the Case Applet, relationships, case attorney list.

The screenshot shows the CARE system interface. The browser address bar is <https://juvenile.utcourts.gov/site/CARE.jsp>. The navigation tabs include Home, FindCase, My Workspace, Case, Party, Incident, Assess, Petition Calendar, eFile, Minutes, Acctg, Order Fulfill, and Victim. The main menu is open, showing options like Find Case, Relationships, Federal Benefits, Assignments for Case, Dispositions, Custody & Probation, Calendar, Documents, Case Assessment Lookup, SAFE Interface, Child Welfare Timeline, Item Tracking, Judge Assignment, and Case Reports. The 'Case Attorney List' option is highlighted. The main form area contains fields for Case Information (Last Update: 08-26-2015, Case Creation: Unknown), Reports (Case History - Long, Case History - Speedy, Sentencing Guide), and Case Details (Case # 955333, First Name LAZ, Middle Name TES, Last Name ZEBRA, Suffix, Gender Male, Date of Birth 01-01-1985, Race White, Ethnicity Can Not Determine, Electronic PIN #, Generate PIN#). A table lists Party Information:

Party Id	Name	Relationship	Mailing Address
	Mother not associated		
375498	HAIRY ZEBRA	Father	123 ZOO PLACE
375499	PHILLY ZEBRA	Petitioner	123 ZOO PLACE

Additional form fields include Adult Case (Yes/No), US Citizen (Yes/No/Unknown), SSN (000000000), Driver License #, Driver License State, Deceased (Yes/No), Date Deceased, HLCI / Med. Health Plan, and SAFE ID #. A 'Create Relationship' button is visible below the party list. The footer shows 'Case # 955333 - LAZY T ZEBRA - Jan 1, 1985' and 'CASE PHOTO DNA COLLECTED'.

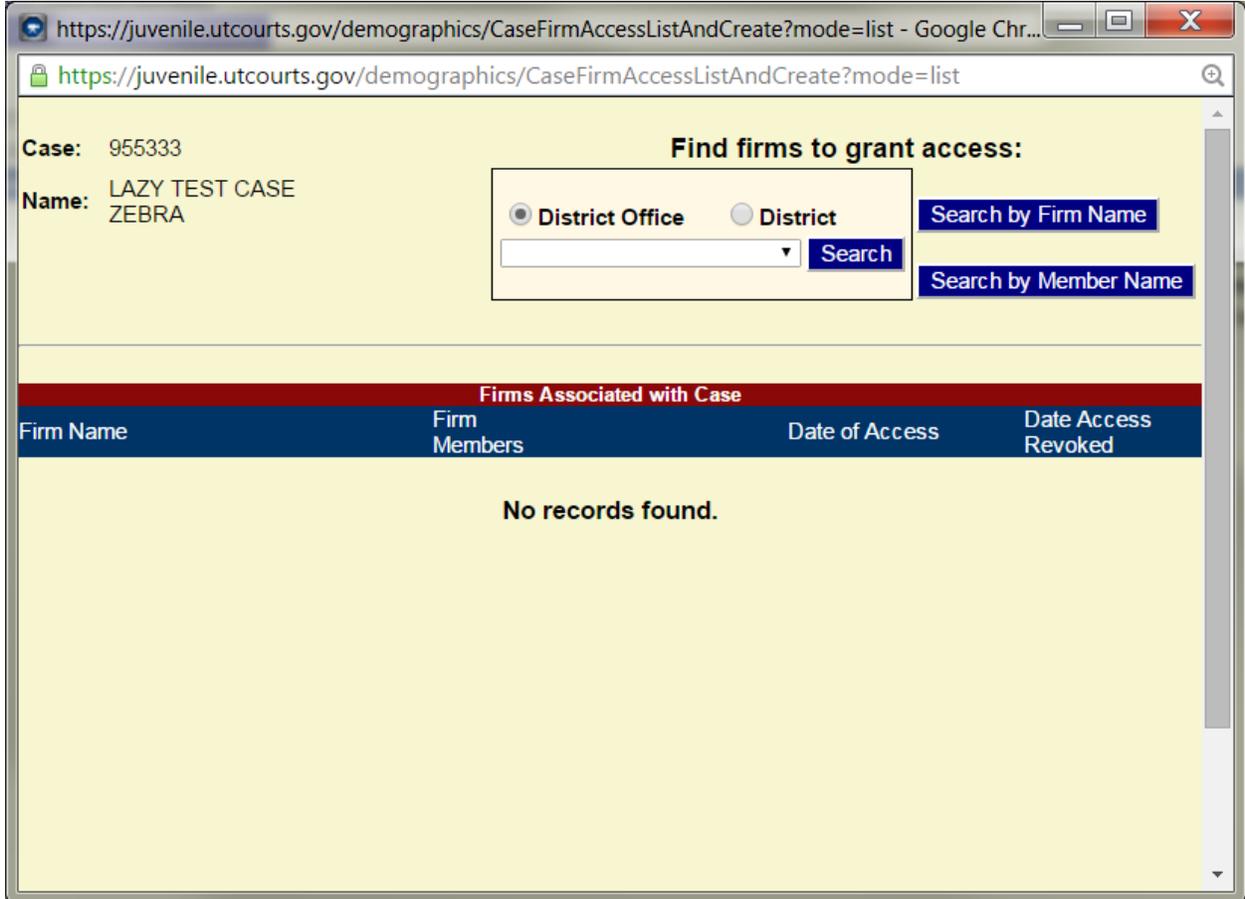
javascript: void window.top.goMenu('/demographics/CaseRelationships?SelectedTabTitle=Case Attorneys');

NOTE: If the attorney files a Notice of Appearance and it is accepted through the clerical queue then it will automatically add firm access. However, the case attorney will still need to be assigned.

Click on the View/Create Case Firm Access button to enter an attorney.

The screenshot shows the CARE web application interface. The browser address bar displays <https://juvenile.utcourts.gov/site/CARE.jsp>. The navigation menu includes: Home, FindCase, My Workspace, Case, Party, Incident, Assess, Petition, Calendar, eFile, Minutes, Acctg, Order Fulfill, Victim, CaseLoad, Service, Admin, eReferral, Case Parties, Case Attorneys, Case Party Attorneys, Relationships, Federal Benefit, Assignments, Dispositions, Cust. & Prob., Calendar, Documents, Assessments, CW Timeline, and Safe Info. Below the navigation menu are two buttons: 'Create New' and 'View / Create Case Firm Access', with the latter highlighted by a blue arrow pointing from the text above. The main content area shows case details for Case 955333, 'LAZY TEST CASE ZEBRA'. A table header is visible with columns: Bar Number, Attorney, Effective Date, Status, Inactive Date, and Access to Case. The table body is empty, and a message states: 'No records found! Click Create New to add a new case attorney record for this case or Return to "Find Case" to select a different case.' The left sidebar contains links for 'Set Defaults', 'My Cases', 'My Calendar', 'eFile Queue', 'My eFiled', 'My eFile Batch', 'CARE Icons', and 'UPDATES' (Releases, Email, HelpDesk).

This screen shows all firms associated to that case and allows you to find firms to grant access for that case.



Case: 955333
Name: LAZY TEST CASE
ZEBRA

Find firms to grant access:

District Office District

Firms Associated with Case			
Firm Name	Firm Members	Date of Access	Date Access Revoked
No records found.			

You can search by the firm name, member name or district office.

Case: 955333
Name: LAZY TEST CASE
ZEBRA

Find firms to grant access:

District Office District

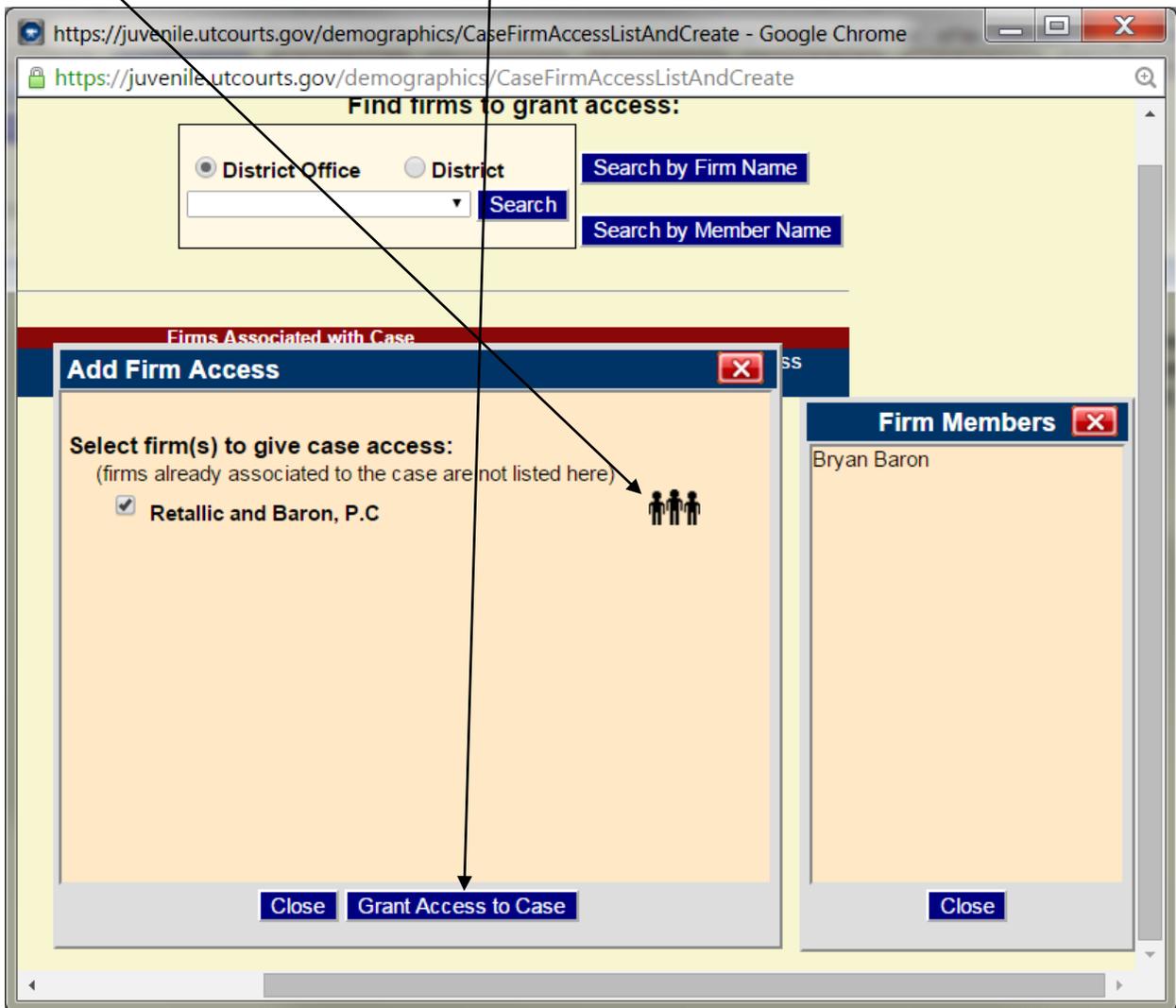
Firms Associated with Case			
Firm Name	Firm Members	Date of Access	Date Access Revoked
No records found.			

SEARCH BY MEMBER NAME

If you click on “Search by Member Name” it will bring up this screen. You can search by the attorney or paralegal’s name. Once the associated firm appears click on the firm name.

Firm ID	Firm Name	Member Name
94	Retallic and Baron, P.C	Bryan Baron (bbaron)

Once you have chosen the firm it will bring up this screen. If this is the correct firm, you can click on the Grant Access to Case Button. You can also click on the three person icon to see all of the members of that firm.



This screen shows that the firm has been assigned. From this screen you can also click on the “edit” button to edit the access of that firm to the case.

Case: 955333
Name: LAZY TEST CASE ZEBRA

Find firms to grant access:

District Office District

Search by Firm Name [input] Search

Search by Member Name [input]

Firms Associated with Case			
Firm Name	Firm Members	Date of Access	Date Access Revoked
Retallic and Baron, P.C		12-16-2015	

Case Firm Access Edit - Google Chrome

Save Delete Cancel

Case 955333
Name LAZY TEST CASE ZEBRA

All fields with (*) are required.

Firm * Retallic and Baron, P.C

Access to Case? Yes No

Date Access Granted 12-16-2015

Date Access Revoked

Last Updated 12-16-2015

Updated By training5

Created By training5

Creation Date 12-16-2015

SEARCH BY FIRM NAME

The next search option is “Search by Firm Name”. You will need to use the percent sign as a search criteria to find the name of the firm. You can also search by Firm Id number, if you know it.

Case: 955333
Name: LAZY TEST CASE
ZEBRA

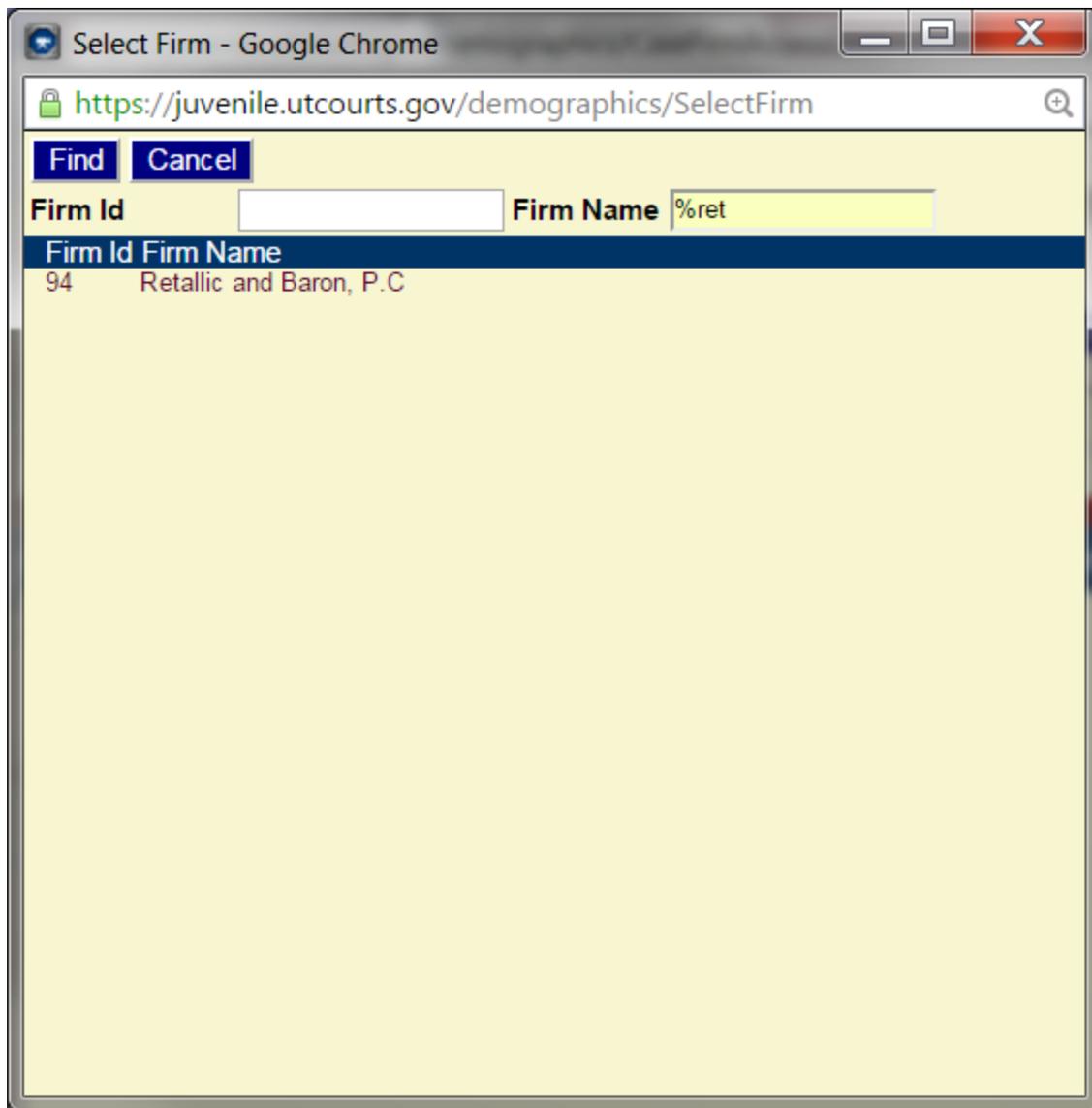
Find firms to grant access:

District Office District

Search

Search by Firm Name
Search by Member Name

Firms Associated with Case			
Firm Name	Firm Members	Date of Access	Date Access Revoked
No records found.			

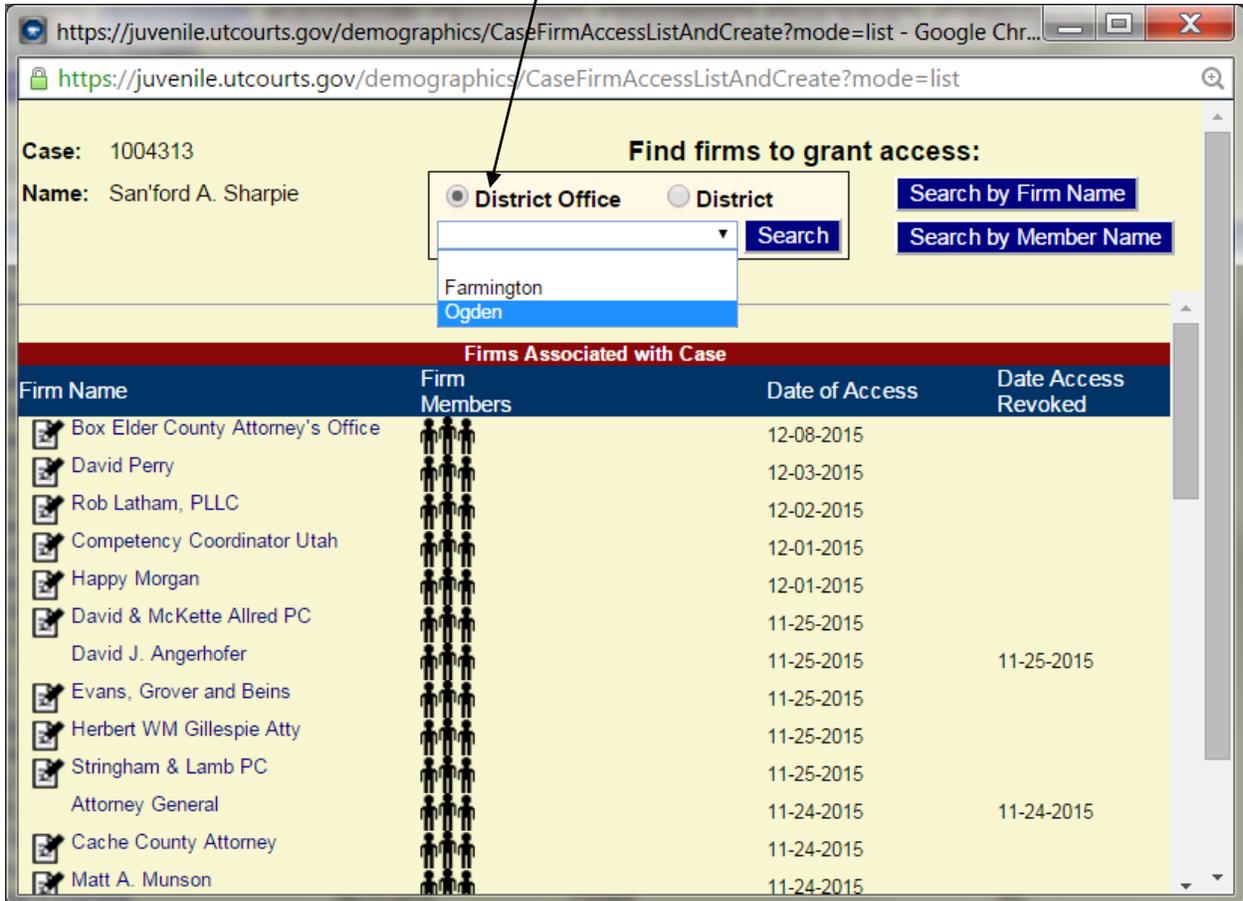


The process for assigning the firm will be the same from this point as explained above.

SEARCH BY DISTRICT OFFICE

You can also search by either the district office or the whole district. This will bring up all the firms found within the search criteria.

NOTE: If the firm has not been created in the system you will not see it on this list.



The screenshot shows a web browser window with the URL <https://juvenile.utcourts.gov/demographics/CaseFirmAccessListAndCreate?mode=list>. The page displays the following information:

Case: 1004313
Name: San'ford A. Sharpie

Find firms to grant access:

District Office District

Search by Firm Name
Search by Member Name

Search

Farmington
Ogden

Firms Associated with Case

Firm Name	Firm Members	Date of Access	Date Access Revoked
Box Elder County Attorney's Office	3	12-08-2015	
David Perry	3	12-03-2015	
Rob Latham, PLLC	3	12-02-2015	
Competency Coordinator Utah	3	12-01-2015	
Happy Morgan	3	12-01-2015	
David & McKette Allred PC	3	11-25-2015	
David J. Angerhofer	3	11-25-2015	11-25-2015
Evans, Grover and Beins	3	11-25-2015	
Herbert WM Gillespie Atty	3	11-25-2015	
Stringham & Lamb PC	3	11-25-2015	
Attorney General	3	11-24-2015	11-24-2015
Cache County Attorney	3	11-24-2015	
Matt A. Munson	3	11-24-2015	

The process for assigning the firm will be the same from this point as explained above.

If the firm already has access to the case it will bring up this warning.

The screenshot shows a web browser window with the URL <https://juvenile.utcourts.gov/demographics/CaseFirmAccessListAndCreate>. The page displays case information for Case 1004313, Name: Sanford A. Sharpie. A search section titled "Find firms to grant access:" includes radio buttons for "District Office" (selected) and "District", a search input field, and buttons for "Search", "Search by Firm Name", and "Search by Member Name".

Below the search section is a table titled "Firms Associated with Case" with columns for Firm Name, Firm Members, Date of Access, and Date Access Revoked. A list of firms is shown, each with a checkbox:

- Box Elder County Attorney's Office
- David Perry
- Rob Latham, PLLC
- Competency Coordinator Utah
- Happy Morgan
- David & McKette Allred PC
- David J. Angerhofer
- Evans, Grover and Beins
- Herbert WM Gillespie Atty
- Stringham & Lamb PC
- Attorney General
- Cache County Attorney
- Matt A. Munson

An "Add Firm Access" modal window is open, displaying the following message:

**The selected firm already has access to the case.
Or no more firms were found matching the search criteria.**

REVOKE ACCESS

To revoke access to the firm, click on the “View/Create Case Firm Access” button.
Click on the “edit” link

Case: 955333
Name: LAZY TEST CASE ZEBRA

Find firms to grant access:

District Office District

Search by Firm Name [input type="text"] Search

Search by Member Name [input type="text"] Search

Firms Associated with Case			
Firm Name	Firm Members	Date of Access	Date Access Revoked
Retallic and Baron, P.C		12-16-2015	

Case Firm Access Edit - Google Chrome

Save Delete Cancel

Case 955333
Name LAZY TEST CASE ZEBRA

All fields with (*) are required.

Firm * Retallic and Baron, P.C

Access to Case? Yes No

Date Access Granted 12-16-2015

Date Access Revoked

Last Updated 12-16-2015

Updated By training5

Created By training5

Creation Date 12-16-2015

Change “Access to Case” to NO and then hit the Save button.

