DOCUMENT OPTIONS:

This area allows you work with documents including assigning them to other Quest users, approving orders, file stamping documents, and storing them in an order book.

Documents Assigned:

You can assign documents to Quest users. Document can be assigned to supervisors for approval, assigned to someone who needs to sign the document, or just for someone to review the document.

FROM THE MENU: Miscellaneous, Document Options, Documents Assigned

<div align="center">

List Documents Assigned
Michael Speciale

If you leave 'Reassign to' blank and update, the selected documents will be removed from your list.

</div>

User ID: micspe   ☐ Ascending date   ☐ Include summary

Reassign documents to: User ID   ☐ Sign selected documents

☐ Show completed documents only

⊙ Submit

Sign/ Reassign	Multi view	Date	Document	Status	Approval	Stamped	Sealed	Notice	Event
☐		11/4/2013 4:04:33 PM	**Petition for Participation of Parent(s)** Bryson Leshawn Patterson (318995; Case: 2; 02D08-1310-JC-000325)	Incomplete E. Doyle		**Pending**	No	No	Additional Initial and Dispositional on 11/13/2013 at 2:30 PM in Magistrate Thomas P. Boyer's courtroom
☐	☐	11/1/2013 4:25:46 PM	**(View) AMENDED VERIFIED PETITION ALLEGING** Ember Kasen Harris (371048; Case: 2; 02D08-1310-JC-000320) Mackenzie Blake Harris (366883; Case: 3; 02D08-1310-JC-000319) James Brenden Harris-Bowser (375327; Case: 1; 02D08-1310-JC-000321)	Complete M. Speciale		11/4/2013 10:23:34 AM	No	No	Additional Initial and Dispositional on 11/5/2013 at 9:30 AM in Magistrate Lori K. Morgan's courtroom (Hearing Held)

- **User ID:** Type in the Quest User ID of the person you wish to view. This will default to you, but you can change it to view anyone's list you wish.

- **Ascending date:** The list defaults to newest on top. If you wish to view the oldest documents on top, click this option.

- **Include summary:** If checked, each document will display the information that will be displayed in the Chronological Case Summary.

- **Reassign documents to:** If you wish to reassign a specific document to another quest user when you are finished, type that person's Quest User ID here.

- **Sign selected documents:** If you wish to put your signature on a specific document, check this option. You can only sign completed documents.

- **Show completed documents only:** If checked, the results will only display those documents with a status of complete. If unchecked it will display both complete and incomplete documents.

Click the SUBMIT button or press ALT+S to display the results of your selections.

To sign a document:

Click to select the <u>Sign selected documents</u> box, if you want to reassign it to someone after you sign the document, type in the user ID of the person you want to reassign it to in the <u>Reassign documents to</u> box. Remember, you can't sign an incomplete document. Users may assign an incomplete document to a person so that person can review the document and make any changes before they FINISH the document.

In the **Sign/Reassign column**, click the document you wish to sign and/or reassign.

Click on the UPDATE button or press ALT+U to save your changes.

This will put your signature in the NEXT signature spot along with the date you signed the document.

If you click more than one document on the **Multi view column**, then click the multi view button at the bottom of the page, you will be able to see all documents selected on one screen, so you don't have to go in to each document separately to view.

The **Date column** is displaying the date the document was finished if the status is complete, or the date the document was created if the status is incomplete.

In the **Document column**, if you click the (view) you can view that document. If you click the name of the document it will take you to the DOCUMENT DETAIL screen. From there you can use the links to get to different screens for that person/case.

The **Status column** shows if the document is complete or incomplete.

The **Approval column** shows if a document is pending approval by the Judge.

The **Stamped column** will show the date of the file stamp or if the document is pending file stamping. If this column is blank, the document doesn't need file stamped.

Sealed & Notice columns simply show if this is a sealed document and if this document gets notice sent.

The **Event column** shows the event this document is attached to, if applicable.

To reassign a document:

<div align="center">

List Documents Assigned
Karlene Thompson

If you leave 'Reassign to' blank and update, the selected documents will be removed from your list.

</div>

essages.

		User ID: KARTHO		☐ Ascending date ☐ Include summary
		Reassign documents to: trohat		☐ Sign selected documents
		☐ Show completed documents only		

<div align="center">⟳ Submit</div>

Sign/ Reassign	Multi view	Date	Document	Status	Approval	Stamped	Sealed	Notice	Event
☑	☐	11/6/2013 12:54:22 PM	(View) Waived Fees Request Form John Smith (1; Case: 1; 53D07-1308-JD-000001) K. Thompson	Complete			No	No	
☐	☐	11/6/2013 10:39:03 AM	(View) Informal Adjustment Agreement John Smith (1; Case: 1; 53D07-1308-JD-000001) K. Thompson	Complete	Needs approval	11/6/2013 10:39:18 AM	No	No	

- **Reassign documents to**: Type in the Quest User ID of the person you wish to reassign the document to.
- **Sign/Reassign column**: Click the document or documents you wish to reassign to that User ID.

Click on the UPDATE button or press ALT+U to save your changes.

To end a document assignment:

If you don't want to reassign the documents, but you don't need them on your list any longer, you can just click the sign/reassign column, selecting those documents you want removed, then click the UPDATE button, and the document assignment will be ended and the documents will be removed from your list.

Documents/Docket Entries:

This will show a list of all the documents and docket entries made for a person/case.

FROM THE MENU: Miscellaneous, Document Options, Documents/Docket Entries

This will take you to the List Documents/Docket Entries screen, which was explained in the CASE section of this manual. More about List Documents/Docket Entries.

List Documents/Docket Entries
Madelyn Alfredson (File# 54292)

Case: [1 - Respondent - 64C01-1206-JS-000534 (Active, Closed/Reimburs)▼]   ☐ Ascending date ☐ Include summary ☐ Show names/cases
List entries containing: [Any text]   ☐ Case related documents only

[⟳ Submit]

Multi view	Date	Document	Status	Approval	Stamped	Order book/page	Sealed	Notice
	Add a new docket entry Add a new document							
☐	10/9/2013 7:47:33 AM (View) Compliance Summary		Complete M. Brown		10/9/2013 11:59:59 PM		No	No
☐	9/27/2013 10:07:03 AM (View) Order To Terminate Probation\<br\> and Place on Admi		Complete A. Gosbin	Approved	9/27/2013 10:07:11 AM	13C01270/7	No	No
☐	9/27/2013 10:06:07 AM (View) JD Order Cover Letter		Complete A. Gosbin		9/27/2013 11:59:59 PM		No	No
☐	9/27/2013 9:03:46 AM (View) Motion To Terminate Probation and Place On Adminis		Complete M. Payne		9/27/2013 10:06:16 AM		No	No

Documents to Approve:

This screen is used by judges to electronically approve orders. Orders really should be assigned to the judge, so the only person who can view this list is that judge. This is particularly important if you have more than one judge approving orders. By assigning, each judge would only see orders they normally would approve.

FROM THE MENU: Miscellaneous, Document Options, Documents to Approve

The approve column: The word Approve at the top of the column is a toggle button, a judge can click this toggle button to select or unselect the approve checkbox for all documents. Documents can also be selected by clicking on the approve checkbox one at a time. Click the UPDATE button to approve all selected documents. This will put the judge's signature and the date of the signature on the appropriate signature line in the document. It will also change the document detail status to APPROVED.

The reject column: The word Reject is a toggle button to select or unselect the reject checkbox for all documents. Documents can also be selected by clicking on the reject checkbox one at a time. Click the UPDATE button to reject all selected documents. If a document is rejected, it will put the words NOT APPROVED on the judge's signature line in the document. It will also change the DOCUMENT DETAIL approval status to NOT APPROVED.

The Under Advise column: Under Advise is also a toggle button. Select those documents you wish to place under advisement. Click UPDATE to save your changes. The document that is under advisement will still remain on this list, but will now be an orange color. It will also change the DOCUMENT DETAIL approval status to UNDER ADVISEMENT.

The documents list clearly shows the approval status.

Documents to File Stamp:

You can file stamp a document from the DOCUMENT DETAIL screen, or you can file stamp documents as a group through this screen. This is a list of documents that have been defined as documents that need to be file stamped. These documents are complete.

FROM THE MENU: Miscellaneous, Document Options, Documents to File Stamp

- **Case type**: You can narrow the list to a specific case type, or leave empty to view all case types.

- **Group by case**: Selected it will group cases together if there is more than one document in that case to be file stamped. Unselected it will sort in date sequence.

Click the SUBMIT button or press ALT+S to display the results of your selections.

The File Column: The word File is a toggle button to select or unselect the file checkbox for all documents. Documents can also be selected by clicking on the file checkbox one at a time. Any documents selected will be file stamped.

Click on the UPDATE button or press ALT+U to file stamp the selected documents.

Once a document has been file stamped, it is removed from this list. The DOCUMENT DETAIL screen will display the file stamp date.

Order Book:

The electronic order book or Record of Judgements and Orders (RJO) as known in some counties, is a copy of every order entered separated by court by date. Each court has an order book (13C01 for court C01) and each day has an order book number (309 for 11/5/13). Each order has a page number.

FROM THE MENU: Miscellaneous, Document Options, Order book

Order Book 13C01309
Enter the order book you wish to view and press Submit

Court: [C01 - Juvenile Circuit ▾] Order book:* [11/5/2013] x ☐ Include summary ☐ Include full text

[⟳ Submit]

Page	Date	Document	Stamped	Sealed	Names
1	11/4/2013 9:13:06 AM	**Agreement filed**	11/5/2013 9:14:44 AM	No	Lilly Ann Forbes (51714; Case: 1; 64D01-0404-DR-003298) Michael John Forbes (51717; Case: 1; 64D01-0404-DR-003298) Michael John Forbes, Second (51715; Case: 1; 64D01-0404-DR-003298) Mary Beth Pfledderer (51716; Case: 1; 64D01-0404-DR-003298)
2	11/5/2013 8:18:11 AM	(View) **JC Detention Order**	11/5/2013 8:18:17 AM	No	Grace M. Reppert (59135; Case: 1; 64C01-1311-JC-001062)
3	11/5/2013 8:19:55 AM	(View) **JC Detention Order**	11/5/2013 8:20:05 AM	No	Makayla A. Reppert-Hook (59134; Case: 1; 64C01-1311-JC-001061)
4	11/5/2013 8:21:48 AM	(View) **JC Detention Order**	11/5/2013 8:21:54 AM	No	Aubrey R. Willett (59136; Case: 1; 64C01-1311-JC-001063)
5	11/5/2013 8:23:31 AM	(View) **JC Detention Order**	11/5/2013 8:23:36 AM	No	Aiden J. Padlo (59139; Case: 1; 64C01-1311-JC-001064)
6	11/5/2013 8:49:05 AM	(View) **Order to Vacate Hearing of November 20, 2013**	11/5/2013 8:49:10 AM	No	Rosemary Garneski (37195; Case: 1; 64C01-9705-JP-000347) Joseph Kasper (37194; Case: 1; 64C01-9705-JP-000347) Michael Joseph Kasper (35309; Case: 1; 64C01-9705-JP-000347)
7	11/5/2013 8:50:02 AM	(View) **Order Approving Agreement of Child Support and Arr**	11/5/2013 8:50:09 AM	No	Lisa S. Daum (52841; Case: 1; 64D01-1005-RS-005224) Nicholas Johnston (52839; Case: 1; 64D01-1005-RS-005224) Richard I Johnston (52840; Case: 1; 64D01-1005-RS-005224) Richard Jesse Johnston (45802; Case: 3; 64D01-1005-RS-005224)
8	11/5/2013 9:57:10 AM	(View) **TELEPHONIC HEARING ORDER**	11/5/2013 3:15 PM	No	Jeffrey P. Flanigan (48384; Case: 1; 64C01-1005-JP-000531) Brooke Ann Stokes (48383; Case: 1; 64C01-1005-JP-000531) Janice Ann Stokes (48385; Case: 1; 64C01-1005-JP-000531)

- **Court:** Select the Court you wish to view.
- **Order book:** Select the date you wish to view.
- **Include summary:** If selected, under each order will be the docket entry that was made for that document.
- **Include full text:** If selected, under each order will be the entire order for you to read. You can also click on the (View) in front of the document name to view only that particular order. If it doesn't have a view, it is a docket entry rather than a document. You can click on the document name to view any scanned document attached to the docket entry.

Click the SUBMIT button or press ALT+S to display the results of your selections.

Document Detail

Document date/time: 11/5/2013 8:18:11 AM   Stamped: 11/5/2013 8:18:17 AM
Template: JCDETORD - JC Detention Order
Status: Complete   By: Anitta Gosbin
☐ Send notice   ☐ Sealed
Approval status: Approved   Date: 11/5/2013 8:18:18 AM   By: Anitta Gosbin
Order book: [13C01309] x   Page: [2]

The DOCUMENT DETAIL screen of each document will display the order book number and the page number for this specific document.