Clerk Duties

Documents To File Stamp

Menu | Misc | Document Options | Documents to File Stamp
(this screen can be saved as a favorite so you can easily get to it.)
There are two options at the top of the screen to allow clerks to file stamp only those types of documents each division of clerks would need. You can filter by

- case type grouping, such as family, juvenile, child support
- actual case type.
- Group by case.

Choose your options or leave empty and click Submit.

- Click the (View) before the name of the document.
- Review the document to ensure everything is signed and looks correct.
- Click the File Stamp button. (puts stamp across top of document)
- Click the View as PDF link at the top of document (This opens a new window tab to the right of the Quest program tab.)
- Print the document.
- Close the document page by clicking the X on that tab.
- This returns you to the Quest document. Click Cancel to get out of that document.
- This returns you to the **Documents to be File Stamped** page.
- Repeat this process for each document that needs to be file stamped and printed.

Assign the document

If you wish to forward this file stamped document to someone, you can assign it to them.
While viewing the document, click the Assign button.

- User ID: type in the user id of the person to whom the document should be assigned.
- Document priority: You can select High, Normal or Low
- Note: If you wish to add a note to this document for the person assigned, you can add it here.
- Click the Update button to save your changes.

Certify Orders

While viewing an Order, click the Certify button to place the certification seal on document.
Print or Email.

Email the document

While viewing a document, click the Fax/Email button.

- Click the underline select box in front of the names of the people you wish to email.
- If there is not an email address, you can type the email address in the first text box.
  - If you are emailing to a person not a party to the case, and you often send documents to this person, such as the jail or DCS liaison for example, their name and email address can be added to the Address Book, so you can just click their name.
- Add optional message in the second text box, if desired
- Click the Send button.

Print Pending Notices

If you click on the name of a document, you are on the Document Detail screen. There is a Notices section that will show "pending" either by US Mail or Email.

- Once documents have been approved and/or file stamped, a report runs called "Print Pending Notices" that will automatically email or print the order in a report form with an address cover sheet and a copy of the document.
- This report runs once or twice a day as needed and is sent to one or more clerk staff to print the US mail documents. The Emails are automatically sent and a report is provided notifying you of those sent emails.
- These emails are sent as a link. The recipient clicks on the link, which is valid for 45 days, and they can then print or save the document, or even forward the link to someone. Once they click on the link, it is recorded on the Document Detail screen.

Order Book/Filings

Menu | Misc | Documents | Document Options |
Orders that are approved and file stamped go into the Minute (Order) book at midnight each night.

- Court = Juvenile Court
- Order book = date
- Submit.

You can also get a list of all documents file stamped on a specific date.

- Order book = date
- Click the show documents filed option
- Submit.

Summons/Subpoenas

These are documents that can be added from the **Case Detail** Screen or from a Court Docket.

Add document

From the Event detail screen, in the bottom right corner, click Add document link.
From the Case Detail screen, in the bottom right corner, click Add document link.
Type partial word such as sum or sub, press TAB on keyboard, select the appropriate document.
Update to continue
Answer all the questions that are located on the top of the screen.

- Update to move forward
- Cancel to get out of the document (Edit Text to get back in)

- Backwards to move backward through the questions
- Top takes you to the very first question
- Preview allows you to see what the document looks like so far. (Cancel to get out of preview)
- Finish when completed (brings up a preview, Cancel to get out of preview)

When a document is finished, while viewing, you can print, file stamp, certify, assign, email.
Cancel to get out of the Document Detail screen.

Scanning Documents

Scanning is a two-part process.
- You must first scan the document using your scanner and save it on your computer. Documents should be saved as a .pdf file with the high compression level which means a smaller file size.
- Then when the Quest document asks you to "select the document to import:"
  - Click the Choose File button and find that saved document on your computer.
- Click the name of the document to upload it into Quest.
- Click the Update button to save the uploaded file.

Return of Service

After issuing a Summons or Subpoena, or any document that gets returned served or unserved, you can scan that into Quest so everyone is aware.
- Add document as shown above but search for a partial word: return.
- Select "Scanned - Return of Service"

The return of service will be displayed on the Court docket.