## MONTGOMERY COUNTY DOMESTIC RELATIONS COURT USER MANUAL

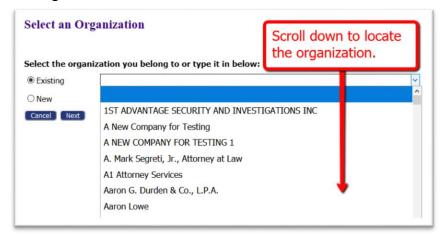
January 2022

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#### **REQUESTING AN ACCOUNT**

- 1. Click Request Account on Login page.
- 2. Read User Agreement. Click Accept radio button. Click Submit button.
- 3. Choose the applicable User Role and click Next.
- 4. Select an **Organization.** Scroll though the drop-down list in the **Existing** field and click the appropriate organization.



- 5. If the organization is not listed, click the radio button **New** and type the name in the provided field.
- 6. Create a **User Account Profile**. Fields marked with an asterisk\* are required. Click **Submit**.
- 7. Login after notification is received that the account request has been approved

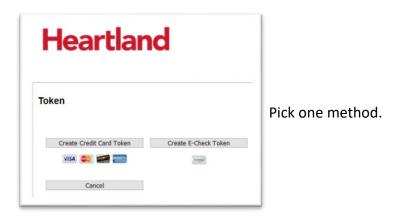
#### SETTING UP A WALLET ACCOUNT

Wallet Accounts pay for court fees and are set up through a secure third-party Payment Vendor. The user creates a token that allows the eFiling system to communicate with the Vendor when payment of a fee needs to take place. (Credit card information is stored only with the Payment Vendor.) Once created, the Wallet Account description is listed on the **Review & Approve** page so that it is an available option for payment for the filing submission.

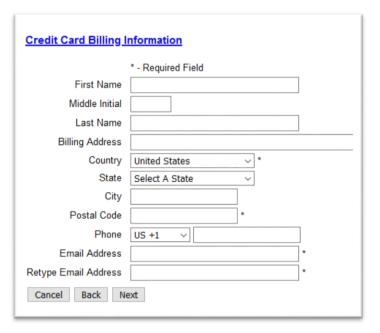
#### **Solo Practitioners and Self-Represented filers**:

- 1. Login to the Filer Interface.
- 2. Hover over the My Profile Tab and select My Profile from the drop-down list.
- 3. In the Wallet section, click Add next to the applicable court.
- 4. Click the applicable button to proceed.

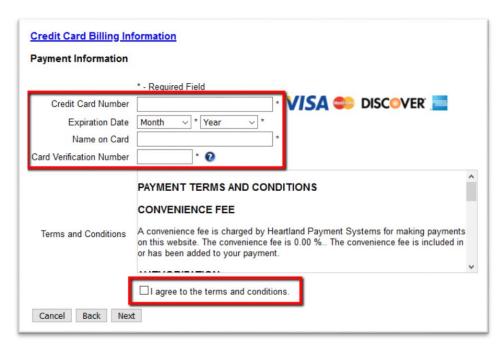




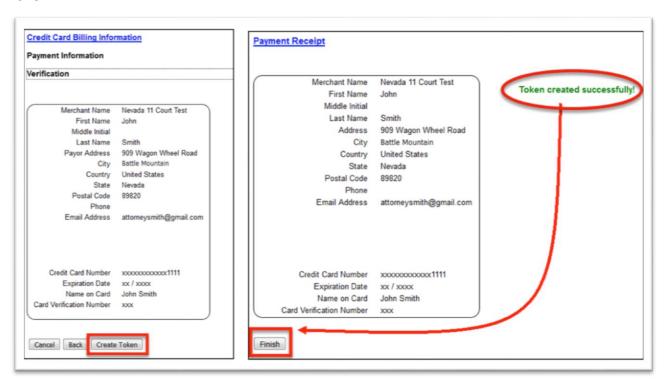
5. Enter billing information. Fields with an asterisk\* are required. Information entered must match identically with the information on the credit card monthly billing or bank statement.



- 6. Click Next to proceed.
- 7. Fill out **all Fields**. Read the *Payment Terms and Conditions* and mark the checkbox that you agree. Click **Next**.



8. Review the displayed information. If it requires editing, click **Back**. If it is correct, click **Create Token**.



- 9. A final screen will appear indicating the Token was successfully created. The user MUST click **Finish** in order to complete the vendor set up process and be returned to the eFiling system.
- 10. Create an **Account Description**. This descriptor will display on the **Review & Approve page** when the filer makes a selection for a payment method.

Enter An Account Description				
Account Description:				
Submit				

Attorneys within a firm who **share** a company credit card, will need a designated **Financial Administrator** to set up the Wallet Account and assign who has access to the card. This role is set up as a separate eFiling account and is necessary for firms that have attorneys who will file using a common credit card. Although this role does not have permission to file, it does have the ability to view all filing charges paid through all firm eFiling accounts.

#### **Financial Administrator:**

- 1. Click Request Account on the Login page.
- 2. Select the role of **Financial Administrator**.



- 3. Create a Profile.
- 4. Login after notification is received that the account request is approved.
- 5. Hover over the **Admin Tab** and select **Account Settings**.
- 6. In the **Wallets section**, click **Add** next to the applicable court.
- 7. Follow steps 4 10 in the section above for **Solo Practitioners and Self-Represented filers.**
- 8. One **additional ESSENTIAL step for Firm Financial Managers** is to authorize *which* attorneys in their firm have access to the Wallet Account as a means of payment.
  - a) Once the user has entered an account description, the Financial Administrator is returned to the Modify Account Settings page where the newly created wallet account will be listed under Item Description.
  - b) Mark the checkbox next to each staff name who is authorized to use that payment method. **NOTE**: It is not necessary for the name of the Firm Financial Manager to be listed when assigning wallet items since their role does not have rights to file.



c) Click Save Changes.

#### USING THE eFILING SYSTEM

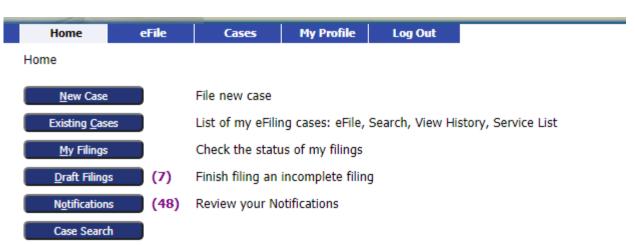
<u>Prepare the pleadings you plan to file and save them to your desk top.</u> Pleadings are required to be submitted in PDF format, except those that require a Judicial signature which are submitted in a Word format. See Local Rules for specifics.

You do not need to prepare the *Divorce/Dissolution Questionnaire*, the *Primary Party Questionnaire*, or any *Instructions for Service*, because the system prepares those documents. A *Secondary Party Questionnaire* shall be submitted when you file an Answer.

#### LOG IN:



#### **HOME PAGE:**



#### **FILING A NEW CASE**

- 1. Click the **New Case** button; New Case
- 2. Select the correct Court Division:

Home ⇒ New Case Filing: Court - Division

#### Court - Division

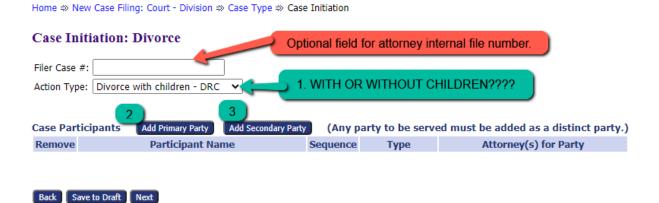
MONTGOMERY COUNTY CIVIL AND CRIMINAL
MONTGOMERY DOMESTIC RELATIONS

3. Choose the Case type:

#### Case Type

# Annulment Dissolution Divorce Domestic Violence Legal Separation Only Custody/Support (not post decree) Registration of Foreign Judgment Registration of Foreign Support Order UCCJEA

4. Fill-in information requested on the Case Initiation Page -

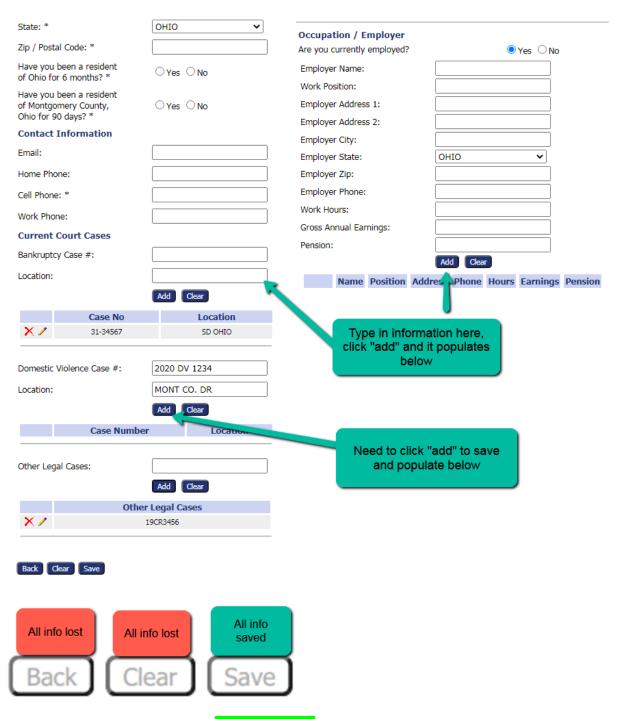


#### Add Case Participants to The Filing:

When you click on Add Primary Party and Add Secondary Party, there will be questions about the parties to be answered, these have been developed to replace the Court's Divorce/Dissolution Questionnaire. The answers fill in the questionnaires.

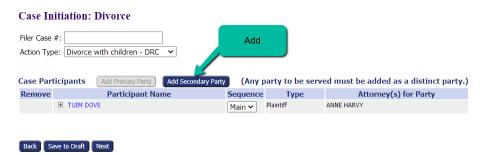
Click the button Add Primary Party and Fill-in information: \*required information

Montgomery County Ohio	Mike Foley, C Common Pleas Cour			eF	iling	
Home eFile	Cases My Profile	Log Out			user: KEITH KERNEE	
Home ⇒ New Case Filing: Court	t - Division ⇒ Case Type ⇒ Case	Initiation ⇒	Primary Party			
Add a Party						
Note: Any party to be served mus	st be added as a distinct party.					
Party Type:	Plaintiff V	A	dd an Attorney	for this Party		Auto
Demographics / Social His	story	, Ту	/pe:	Primary	~	populates
Prefix:	~	Fir	rst Name:			from atty
First Name: *		, ] [a	st Name:			log-in
Middle Name:						
			ar Number:			
Last Name: *		Ba	ar State:	OHIO		
Suffix:	~	_		Add		
SSN: *			First Name	Last Name	Bar No.	State Delete
DOB: *		k	ŒITH	KERNEE	0000004	он 🔀
Age: Male O Female O		Aliacas au E	ormer Names			
Interpreter needed? *	○ Yes ○ No	Prefix:	officer Names	~		
Number of Marriages: *		First Name:				
Birth Place		Middle Name:				
City:		Last Name:				
State:		Suffix:				
Country:		Julia.	Add			
Education		Alias Dalas	_			
	☐ High School ☐ GED ☐ College ☐ Post Graduate ☐	Alias Dele		_		_
Address Information	_			Add		
If you are requesting your addres provide another mailing address	where you can safely receive	Address D	elete			_
notices from the court. This		Physical Des Race: *	scription	~		
Confidential Address: *  Physical Address	○ res ♥ No	Height:				
Unknown:		Neight:				
	Home 💙	Hair Color:		~		
Address Line 1: *		Eye Color:		~		
Address Line 2:		Financial In	formation			
City: *			public assistance?		No O Pending	
		Are you retired Are you curren	1? Itly enlisted in the M	○Yes ○N ilitary? ○Yes ○N		



**CLICK SAVE** 

#### Then Add Secondary Party information:









continued

DOB:					
Age:		Additional Aliases for Party			
Male O Female O		Prefix:  First Name:			
Number of Marriages: *		Middle Name:			
Interpreter needed? *	○ Yes <b>○</b> No	Last Name:			
Birth Place		Suffix:			
City:		Add			
State:		Alias Delete			
Country:		Add Additional Addresses Add			
Education		Address Delete			
Editication Level.	☐ High School ☐ GED ☐ College ☐ Post Graduate	Physical Description			
Address Information		Race: *			
Unknown:		Height:			
Address Type:	Home 🕶	Weight:			
Address Line 1:		Hair Color:			
Address Line 2:		Eye Color:			
City:		Occupation / Employer			
		Is Secondary Party currently employed?   ¬	es O No		
County:	Montgomery ~	Employer Name:			
State:	OHIO 🕶	Work Position:			
Zip / Postal Code:		Employer Address 1:			
Has Secondary Party been	○ Yes ○ No	Employer Address 2:			
a resident of Ohio for 6 months?		Employer City:			
Has Secondary Party been a resident of Montgomery	○Yes ○No	Employer State:	OHIO 🕶		
County, Ohio for 90 days?		Employer Zip:			
<b>Contact Information</b>		Employer Phone:			
Email:		Work Hours:			
Home Phone:		Gross Annual Earnings:			
Cell Phone:		Pension:			
Work Phone:			Add Clear		
		Name Position Add	ess Phone Hours Earnings Pension		







**Other Information** 

public assistance? Is Secondary Party currently

Branch:

enlisted in the Military?

**Duty Station:** 

Reservist:

Deployed:

Active Duty: OYes ONo

○Yes ○No

○Yes ○No

Is Secondary Party retired?

Does Secondary Party receive

○ Yes ○ No

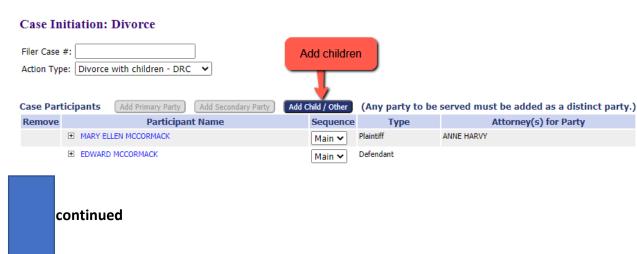
○ Yes ○ No

○ Air Force ○ Army ○ Coast Guard

O Marine Corps O Navy

Click to Save.

In cases with minor children, an additional field "Add Child/Other" will display on the Case Initiation Page after primary and secondary party information is completed.



#### Add a Child / Other: Divorce Child of Party? Yes No Minor or dependent Personal Information child of the parties First Name: \* Middle Name: Last Name: " DOB: \* mm/dd/yyyy SSN: Male O Female O Other Information Name of School: Grade: Living With: Back Save

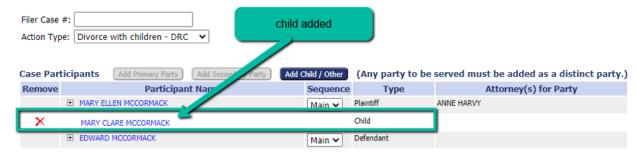


Enter the required information and click **SAVE**.

#### Add a Child / Other: Divorce

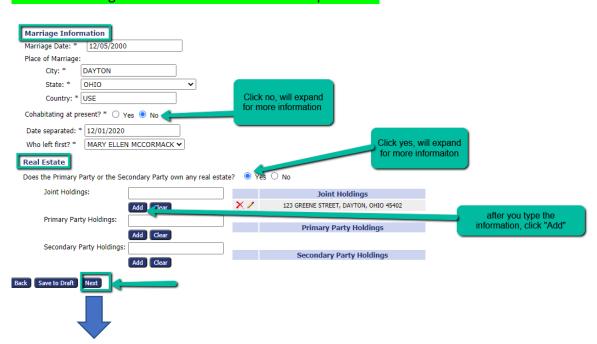


#### Case Initiation: Divorce



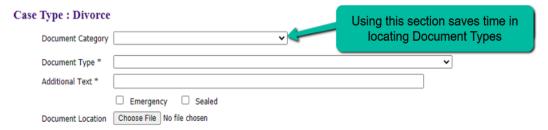
Add more children as appropriate to your case.

#### Answer Marriage information and Real Estate questions:



5. Add a Document Page – Uploading documents to be filed.

Home ⇒ New Case Filing: Court - Division ⇒ Case Type ⇒ Case Initiation ⇒ Add a Document



#### **DOCUMENT CATEGORIES FOR ATTORNEYS**

INITIAL PLEADINGS	ATTY INSTRUCTIONS FOR SERVICE
DOMESTIC VIOLENCE	ATTY MEMORANDUMS
CONCILIATION	ATTY MISCELLANEOUS
FSO & OS FILINGS	ATTY MOTION TO SET ASIDE MAGISTRATE ORDER
REPORTS & TEST RESULTS	ATTY MOTIONS - POST DECREE
RETURN OF SERVICE	ATTY MOTIONS - PRE-DECREE
SHARED PARENTING DECREE	ATTY NOTICES
ATTY AFFIDAVITS	ATTY OBJECTIONS
ATTY AGREED ENTRIES	ATTY PRE-TRIAL STATEMENTS
ATTY ANSWER & COUNTERCLAIMS	ATTY PROPOSED ORDERS
ATTY ATTORNEY FEE	ATTY REQUESTS FOR CD-ROM
ATTY DECREES	ATTY RESPONSIVE PLEADINGS
ATTY DISCOVERY	ATTY UCCJEA FILINGS



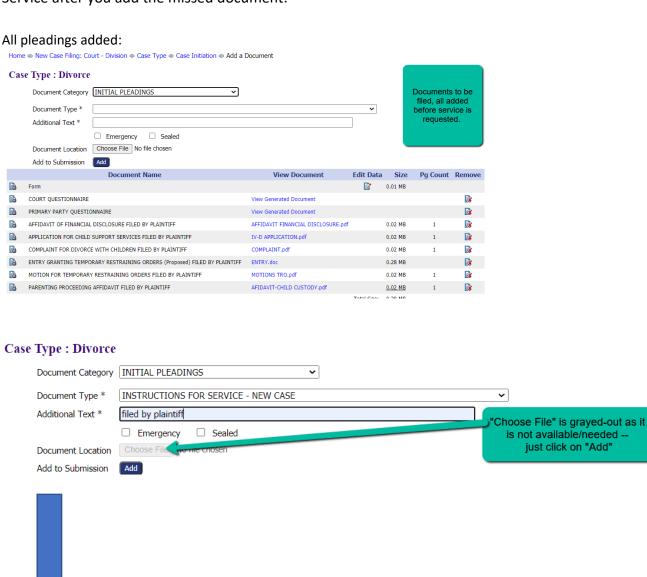
6. WE PUT MOST DOCUMENTS USED TO START A CASE UNDER THE DOCUMENT CATEGORY: "INITIAL PLEADINGS." Make sure you have all your pleadings ready and saved.

Home ⇒ New Case Filing: Court - Division ⇒ Case Type ⇒ Case Initiation ⇒ Add a Document Case Type: Divorce **INITIAL PLEADINGS** Document Category Document Type \* Additional Text \* ☐ Emergency ☐ Sealed Document Location Choose File No file chosen Add to Submission Edit Data Size Pg Count Remove **Document Name** View Document Pà 0.01 MB Form B Were prepared with your COURT QUESTIONNAIRE View Generated Document × answers to all those questions PRIMARY PARTY QUESTIONNAIRE View Generated Document × Total Size: 0.0 MB Back Move to Draft Next Document Category INITIAL PLEADINGS All that you should need will be found here Case Type: Divorce Document Category INITIAL PLEADINGS Use drop down to find document type Document Type \* COMPLAINT FOR DIVORCE WITH CHILDREN filed by Mary Ellen ☐ Emergency ☐ Sealed click on "choose file" to seach your computer for document and click on it to attach Document Location Choose File COMPLAINT.pdf Add to Submission Add to add to group below View Document Edit Data Size Pg Count Remove Dà. 0.01 MB m COURT QUESTIONNAIRE EX. View Generated Document PRIMARY PARTY QUESTIONNAIRE View Generated Document Total Size: 0.0 MB Back Move to Draft Next **Document Name** View Document **Edit Data** Size Pg Count Remove



Continue adding all the required documents one at a time. To view the listed document, click its hyperlink title. To delete, click the **Remove icon**.

7. **Service Request/Waiver**: Once all the documents you want to file are added to the list, prepare your service request in the system which is handled differently as it does not require a downloaded document. The system prepares the request for service with questions you answer on the opened page. Make sure all your documents are added before starting this process. If you miss one, delete the Instructions for Service and restart the Instructions for Service after you add the missed document.



#### **INSTRUCTIONS FOR SERVICE PAGE OPENS:**





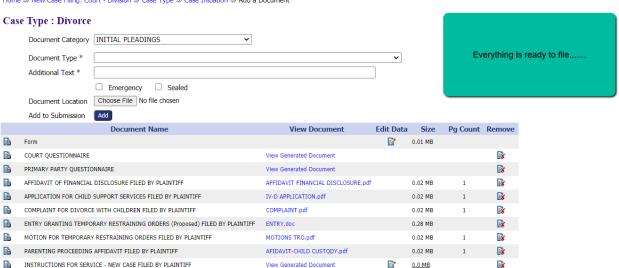
#### **Divorce**



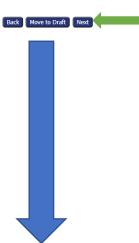
#### Select the Party to be Served



Home ⇒ New Case Filing: Court - Division ⇒ Case Type ⇒ Case Initiation ⇒ Add a Document



Total Size: 0.38 MB



#### 8. Review, Approve, and Pay Page



**Review and Approve Filing Page** – *View, add, or remove documents from the filing.* 

- a. The optional Filer Case# field is a convenience for filers with an internal filing system.
- b. The Change Case Data button enables the filer to edit entered information.
- c. View the documents to be submitted. Click the **Add/Remove Document button** to make changes. Update your Instructions for Service.
- d. Use the optional **Special Filing Instructions field** as a means to communicate with the Clerk.
- e. Click the appropriate button:
  - Submit to proceed with the filing.
  - **Back** takes you to the Case Initiation page.
  - ➤ Move to Draft Click if you choose to finish the submission at a later time. All data will be saved in a file called "Draft Filings."
  - Cancel (Delete) Client changed their mind.....





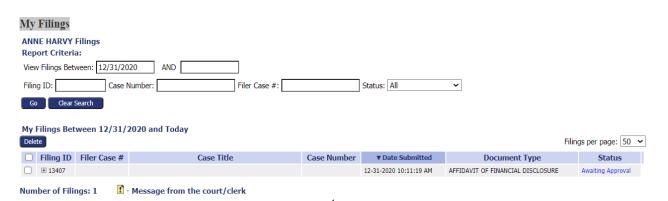
#### Your Filing has been submitted

Case Type: Legal Separation - AFFIDAVIT OF FINANCIAL DISCLOSURE

**Note:** This filing is now being processed and added to the Clerk of Court(s) document repository. Once eFiling has stored the documents associated with your filing, a receipt will be issued to you. You may view the status of this filing, and access your receipt for 60 days, after which it will be purged from this system. The documents will be retained and available long term through the Clerk of Court(s).



#### 9. **Tracking progress of filing:** You can follow the status of the filing:





#### **WORKING WITH EXISTING CASES**

### If you are not an Attorney of Record on the case, BEFORE anything else: Prepare your Notice of Appearance and file it.

Until you are entered into the system <u>by the Clerk's office</u>, your access to the eFiling Case System is limited. So send the Notice of Appearance and get on the case. Once you receive a Notice from the Clerk that your filing has been approved, you will have full access to the eFiling System.

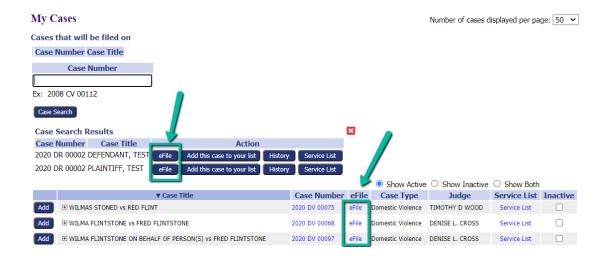
- 1. From the Home page, click the Existing Cases button. Existing Cases
- 2. Note each column header in the Case Information Table has an ascending/descending sort feature by clicking on the header title and controlling the order of the listings with the up/down arrow. This allows sorting by case title, case number, case type, or judge hearing the case. Click the hyperlink Service List to view service list information. Click the radio buttons Show Active, Show Inactive or Show Both to alter the cases displayed in the table.



3. To Find a Case. If the case is not on the list, enter the case number (2020 DR 00002) in the provided field and click Case Search. If you are attorney of record, the case will be in your list.

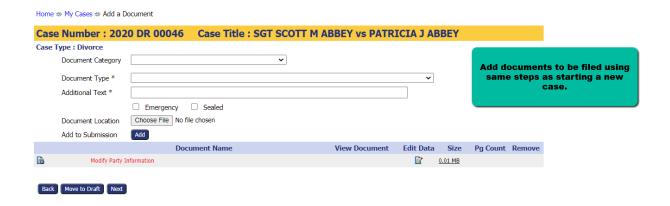


#### **eFILING TO AN EXISTING CASE**



Click hyperlink eFile to file on the case.

Note – clicking the **History** or **Service List buttons** will open a new browser tab and display the respective information. Clicking the button **Add this case to your list** will add the case to the **My Cases page**.



If you are filing an Answer or Answer and Counterclaim, a *Secondary Party Questionnaire* is required to be filed. You can locate a *Secondary Party Questionnaire* on the Court's website.

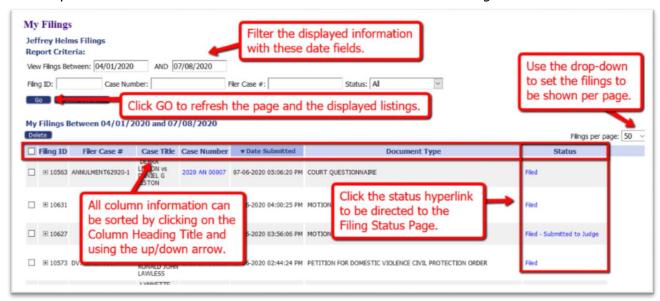
If you want to use the Instructions for Service, for example to have the Restraining Order served personally on the plaintiff, then you need to be Attorney of Record. There are <u>no</u> other options. Don't try "miscellaneous" because it will not go to the Clerk's Service staff. Plan accordingly.

#### **CHECKING THE FILING STATUS OF A SUBMISSION**

1. On the Home page, click the button **My Filings**, or hover over the **eFile Tab** and select **My Filings** from the drop-down list.

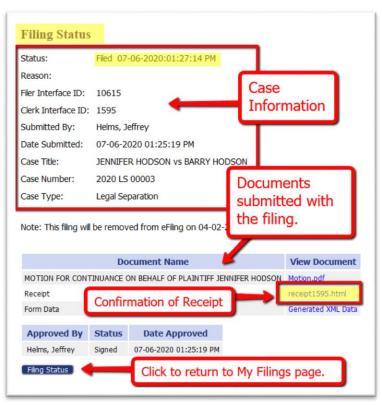


- 2. On the **Filing Status** page, set the date to include the date of submission and click **Go** to refresh the page and locate the submission listing.
- 3. The **Status** column is on the right. Click the **status hyperlink** to be directed to the **Filing Status Page** where the filer is able to access the Confirmation of Receipt as well as links to the filestamped documents if the status is "Filed" or "Filed-Submitted to Judge."



#### **ACCESSING A FILING'S RECEIPT CONFIRMATION**

The **Filing Status Page**, which is accessed by clicking on a submission's *hyperlink status* in the **Status Column** on the **My Filings Page**, shows detailed case information. This includes the time stamp, a link to open the official confirmation of **receipt** in a new browser tab, and the documents submitted with the file.



#### **RESUBMITTING A REJECTED FILING**

- 1. If a filing's status is **Rejected**, click the status link to view the reason for rejection.
- 2. A filing rejection will generate a "one-time-use" **Resubmit** button to the right of the status column.



- Click the Resubmit button. This will cause the system to clone the information in the rejected submission for use in a new submission and will route the user to the Add-a-Document page.
- 4. Make the necessary corrections to the filing. Click Next.
- On the Review and Approve Filing page click Submit.
   NOTE: The Filing Status page will now display a Resubmitted status for the first filing and will create a new line for the resubmitted filing.



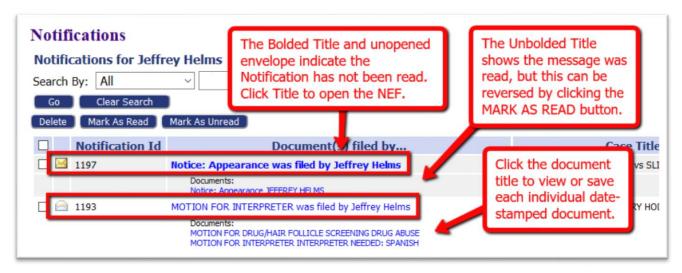
#### **VIEWING NOTIFICATIONS**

Notifications are the official court communication regarding eFiling activity on a case. To obtain the *official* notification, the user must login to the eFiling system. The user may also get *unofficial*, courtesy emails regarding efilings to the user's case.

1. On the **Home** page, click on the **Notifications** button, or hover over the **Cases** Tab and select **Notifications** from the drop-down list. If there is a number in parentheses next to the **Notifications** button, this indicates how many "unread" notifications currently exist.



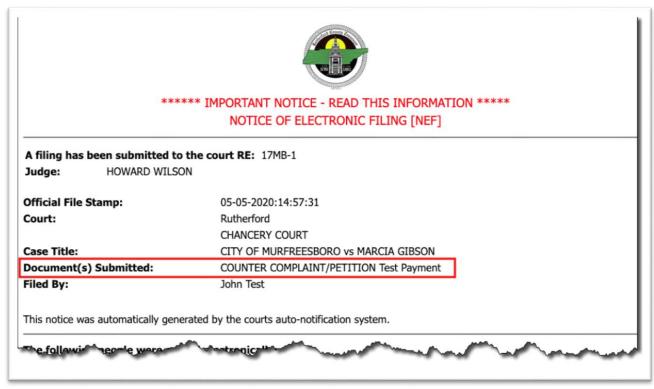
2. Notifications with bolded headings are "Unread" Notifications. Additionally, unread notifications have a closed envelope to the left of the listing. This status is displayed when the page has been "refreshed" by exiting the page and returning.



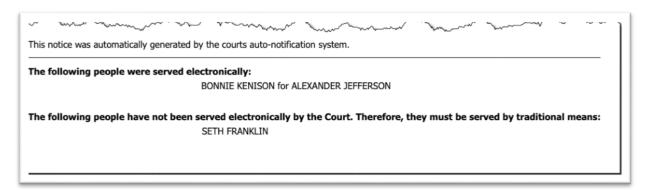
Users may also use the **Mark as Read** and **Mark as Unread buttons** to manually change the display of the envelope.



- 3. To open the official Court Notification, click the hyperlink **Document Title**.
- 4. The **NEF** (Notice of Electronic Filing) will display in a new browser tab.
  - a. The top of the NEF contains case-related information, including document(s) filed.



- b. The bottom portion of the NEF indicates the **service requirements** at the time the listed document was submitted. (Future or past submissions may have different service requirements.)
- c. Persons being served via the email system are listed first on the NEF.
- d. Persons still requiring service by traditional means are listed under the second heading.



- 5. To view the document(s) within the filing, click the *hyperlink document title* listed under the **NEF title** in the **Documents(s) filed by column**. The time-stamped document will display as a pdf. Users may choose to download hard-copies for their records.
- 6. The system is coded to auto-clean the notifications after a set period as determined by the court. Users can manually clean the page by using the checkbox in combination with the delete button.

#### **CASE SEARCH BUTTON – PUBLIC RECORDS**



For convenience to the filer, clicking the **Case Search Button** on the **Home page** directs the user to the **Montgomery County Clerk of Courts Public Records page**. This page allows easy access to all public filings. For further information regarding navigating these pages, contact the Clerk of courts.



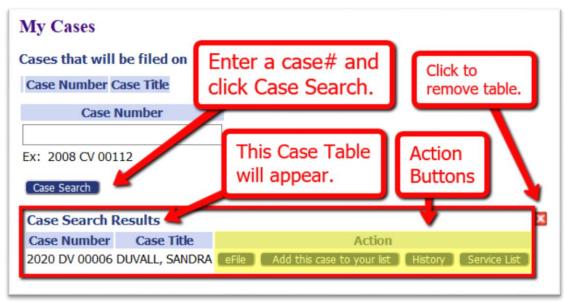
#### ACCESSING CASE INFORMATION \*\*\*\*\*\*\*\*\*\*\*\*\*\*

The My Cases page gives the user easy access to cases, documents filed to the cases, and to the service list information associated to a particular case at the time of the query.

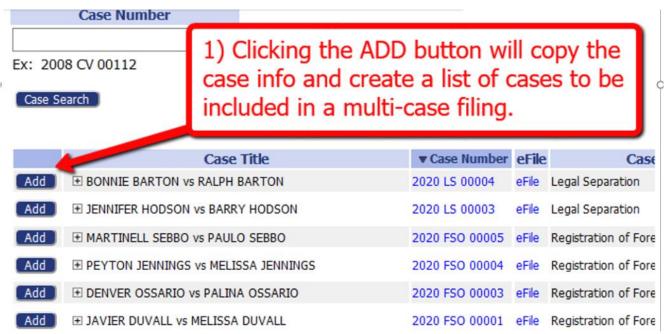
1) On the **Home page**, click the button **Existing Cases**, or hover over the **Cases** Tab in the menu bar and select **My Cases** in the drop-down list.



- 2. To view case information, type the case number in the provided text field and click **Case Search.** A pop-up **Case Search Results** table will display with four action buttons:
  - a. **eFile** Click to file to this existing case.
  - Add this case to your list Click if this case is not currently displayed on the My Cases Page, but should be.
  - c. **History** Click to view the **Case History**, which will display in a new browser tab.
  - d. **Service List** Click to view who was served notification on a filing and in what manner whether electronically or by traditional means. This will display in a new browser tab.
  - e. Click the red "X" to remove the Case search Results table.



- 3. The bottom portion of the page displays the **Case Information Table**. It has an ascending/descending sort feature by clicking on the header title and controlling the order of the listings with the up/down arrow.
  - a. The Add button in the left column is used when creating a multi-case filing. This feature is used when the same documents are to be filed to multiple cases at the same time. Clicking the Add button will copy the case number and title to the top of page to allow the filer to group and list the cases together. Proceed with the filing by clicking the button File on these Cases. This will direct the filer to the Add-a-Document page.



- b. Clicking the + sign next to the case title in the Case Title column will display the documents filed to the case. Further, clicking the *hyperlink title* within this expanded view will allow the filer to either open or save the selected document.
- c. Clicking the *hyperlink case number* in the Case Number column will open a new browser tab and display the Case History, which includes case participant information as well as links to open, view, and print court-stamped documents. (see screenshot below\*\*)
- d. Clicking the *eFile hyperlink* will direct the filer to the **Add-a-Document page** to proceed with a new filing.
- e. Clicking the *hyperlink Service List* in the **Service List Column** opens a new browser tab and identifies those case parties who received a filing's notification electronically or by traditional means.
- f. Marking the checkbox in the **Inactive column** gives the user the option to hide the case from view by clicking their choice of radio buttons: **Show Active**, **Show Inactive** and **Show Both**.



**NOTE:** Although any user with a correct case number can file, users will not be able to view a case history unless they are party to the case or counsel of record. Self-Represented filers will need to file a motion or initial pleading to their case to be electronically connected to their case. This will permit them to view the case history.

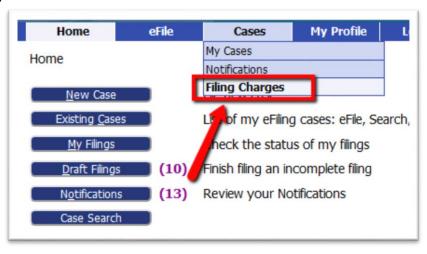
Case History page – accessed by clicking on the *hyperlink case number* in the Case Information Table or by clicking the History action button in the Case Search Results table:



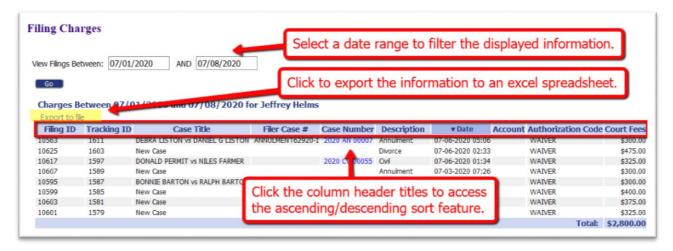
#### **REVIEWING FILING CHARGES**

There are court fees associated to many documents and submissions. When payments are made, the System records the payments and keeps track of the charges. Payments made are tracked for a twelve-month period.

1. On the Home page, hover over the **Cases Tab** in the menu bar and select **Filing Charges** from the drop-down list.



- 2. The information displayed on the **Filing Charges page** can be filtered by date range. By default, the current month is displayed in the date field. Click the field to make changes. Click **Go** to display the results of the selected dates.
- 3. The **Filing Charges Table** has an ascending/descending sort feature by clicking the column header titles and controlling the order of the listings with the up/down arrow. This user-friendly feature allows the filer to locate needed information with greater ease.



4. Click the *hyperlink Export to File* to export the **Filing Charges Table** to an excel spreadsheet.

#### **MY PROFILE**



#### **Change My Password**

Change Password

#### **Change Password**

*Required Fields		
Password:	*	
New Password:	*	
Confirm New Password:	*	
Cancel Submit		

#### **View Login History**

Login History

#### **Login History**

#### **KEITH KERNEE Log In History**

User Account Status: Active Entries per page: 50 ✓

Date Logged In Log In Result Requesting IP Address

#### **LOG OUT** [The system will time out after 30 minutes of inactivity.]

Or Log Out manually:



When you are finished, Log Out. If you have incomplete filings, the system will remind you.

You have incomplete Filings. Are you sure you want to log out? Yes No

Filing ID Filer Case #	Case Number	Case Title	Description	▼ Create Date	<b>Days Until Deletion</b>
15295			Custody and Support	09-13-2021 03:46:13 PM	976
14839			Child Support	07-23-2021 09:09:47 AM	924
14831			Child Support	07-22-2021 03:00:35 PM	923
14785			Child Support	07-16-2021 03:59:59 PM	917
14665			UCCJEA	07-13-2021 11:47:12 AM	914
14431			UCCJEA	06-30-2021 11:34:39 AM	901
14429			UCCJEA	06-30-2021 11:17:57 AM	901
14091			Domestic Violence	04-21-2021 11:37:13 AM	831

You have incomplete Filings. Are you sure you want to log out? Yes No "No" will take you to Draft Filings

#### **DRAFT FILINGS**



#### Draft Filings Adding your client information at the start of the process will help **Draft Filings** you track your Drafts Delete Create New Filing ID Filer Case # Case Title Case Number Days Until Deletion ▼ Create Date 09-13-2021 03:46:13 PM 976 14839 07-23-2021 09:09:47 AM 924 14831 923 07-22-2021 03:00:35 PM

#### **Draft Filings**



#### **Draft Filings**

