

E-FILE HELPFUL HINTS

NEW CASE FILING ENTRY

- CSA must first request to opt In as electronic party to case before converting an existing case to e-file
Clerk of Courts files must also be scanned and converted to e-files before CSA's can request to opt in.
Counties will need to establish a process for sending opt in requests to the Clerk of Courts.
- **Petitioner Entry**
If State of Wisconsin is also a petitioner in case, enter "State of Wisconsin Child Support" as the first petitioner. If entered as second petitioner, it appears as if the state is representing the first petitioner. Once the State of Wisconsin is entered in e-file, there is an option in the Petitioner #1 entry screen, "Select a previously entered party", that will load the information automatically.
- **Participant Information Entry**
Enter the address information and select the Participant Protection Requested box. This option allows Clerk of Courts access to the address, but will prevent it from being available for public CCAP viewing. Do not enter phone numbers.

DOCUMENT ATTACHMENT ISSUES

- **E-filing KIDS "Bundled" Documents**
When preparing documents in KIDS/DocGen that are currently bundled, CSA's will need to generate documents separately. (This can be done a number of ways) Complete document and use F22 printdoc option to select the individual pages to print to pdf, then F11 when complete to save the bundle in KIDS and to generate the case event. Use the individual documents for attachments when e-filing.
Can also choose to not COM subject lines in DocGen and prepare the documents separately.
- **Interstate Actions**
Scan documents separately for attachments in e-filing (e.g. CSET, Registration, General Testimony, etc..)
- **Filing Documents That are Not in KIDS**
Convert or scan document to pdf form and save in an accessible folder (e.g. Child Support % Guidelines)

SIGNATURES AND NOTARY

- **Signatures:**
 - Participant - Print document, sign, date, and scan to pdf document folder
 - CSA Staff - Print document, sign, date, and scan to pdf document folder *
 - Attorney & Judges - In DocGen remove COM for Signature and date block
E-File inserts entire signature block during approval process
- * *Suggest eliminating documents with CSA staff signatures. (e.g. Include Affidavit information in the Motion or Petition)*
- **Electronic Notary**
E-file is designed to simulate the true notary process of witnessing the signature. If notary is required, the Attorney will be prompted to have an e-file notary login and this must be done at the computer the Attorney is currently signed into. Attorney will need to coordinate this action with notary staff.
- **Documents Not Requiring CS Attorney Signature**
Must still be routed through e-file process to CS Attorney as there is no means for CSA to e-file documents directly to Clerk of Courts.
- **Obtaining Electronic Signatures when Attorney or Judge is not available**
Counties will need to develop process with their Attorney, Clerk of Courts, and Judges. This may be a manual process if necessary and then document would be scanned to pdf for e-file processing.

CONVERTING PDF TO MS WORD

- **Carefully Review Converted Documents** Before Attaching in E-file
There may be distortion issues or extra pages in the document. Counties using Adobe Acrobat Pro software report that they have had no distortion issues with conversion from KIDS pdf to MS Word
- Distortion Issues with Documents **Scanned** to pdf Format and then Converted to MS Word
Scanners set up to send the pdf document to an e-mail address may cause issues when converting to MS Word. Having the option to scan the pdf document to a file folder does resolve this issue.

PRINTING

- Some Document Printing Still Required (e.g. process service and providing copies to participants)
This is done by selecting the document either from the e-mail notice or through the e-file system. Reference: [Searching, Viewing, and Printing E-File Documents](#) procedure for further detail.
- Other uses for KIDS print to pdf option
Sending documents as e-mail attachments or viewing and sending EOS reports as e-mail attachments.

MANAGING E-FILE NOTICES

- Suggest Separate e-mail Account to Direct eCourt Notices to
Notices generated for **every** e-file action that occurs on a case and results in a tremendous amount of e-mail. There is no way to segregate the e-mails to go to specific caseworkers so the notices go to the CS Attorney and everyone delegated under them. Recommend designated e-mail account with access for designated staff to monitor and manage actions for emails based on the type of notice.
- Managing Folder(s) Containing pdf Documents
When KIDS sends the pdf document to the designated folder, they are numbered sequentially. Recommend CSA staff change the name of the document for easier identification when selecting from this folder during the e-file process. Suggest also that folder contents be maintained by removing documents periodically after the e-filing process is complete.

OTHER ISSUES

- E-Filing Errors
If an error is discovered **before** the CSA Attorney has completed the approval process, CSA can request the Attorney to reject the filing. If the document was approved, the CSA will need to contact Clerk of Courts staff for assistance in rejecting the filing.
Errors that occur during processing default to a screen on the Clerk of Courts e-court dashboard (In the E-Filing Review screen there is a check box "**Show Filings Waiting for Payment**"). CSA's should contact Clerk of Courts to check this screen if documents have not processed through in a timely manner. If the error(s) cannot be resolved, CSA may have to re-file the documents.
- E-Filing 4:30pm Deadline
Counties will need to develop process with their Attorney, Clerk of Courts, and Judges. This may be a manual process if necessary and then document would be scanned to pdf for e-file processing.
- Clerk of Courts File Stamp
Issue with overlap into DocGen document header text - being addressed by CCAP Steering Committee
- Suggestions for identifying and tracking the Child Support cases converted to E-file
 - ✓ Entry in KIDS events indicating e-file conversion
 - ✓ If not immediately destroying file folder - segregate files or add identifying mark on label
 - ✓ Track cases using agency case file report