

## **E-FILE TRAINING PREPARATION CHECKLIST**

Training sessions are scheduled to include instruction for Attorneys, Clerk of Courts, and Child Support staff all in the same timeframe. The number of available on-site CCAP trainers is also limited, so being prepared will help maximize your training time.

KIDS pdf printer session set up

*Contact the DWD IT Solutions Center at 608-266-7252 Option # 6 to have printer sessions set up for staff, they will create a service request and send to DOA. Be prepared to provide a contact name from your IT Department for them to work with, along with required staff information.*

*★ Recommend folders be on a shared or network drive so other staff can access if worker is absent.*

*Reference Setting up pdf Printer Session in KIDS procedure for further set up detail.*

Review options for software that can convert pdf documents to Microsoft Word format, or have the ability to generate Word documents as orders requiring a judge's signature must be e-filed using Word format.

*Adobe Acrobat Pro works well without distorting documents, but costs approx. \$350 per user.*

Have ability to scan printed documents into pdf format. (I.E. Pro Se Stipulations or Affidavits) There are currently no options for electronic signature for participants or for Child Support staff.

Coordinate with the Clerk of Courts office to identify cases to use for entry training.

*This is necessary to ensure the selected cases are already in e-file status at the Clerk of Courts*

Prepare for where initial overview meeting and the hands on training will occur.

*Child Support, Clerk of Court, and Attorney staff members will need to be present at the initial overview meeting. Training will occur separately for Child Support, Attorney, and Clerk of Courts staff and is intended to be hands on, so you will need computer access.*

Attorney(s) must be present at the initial meeting to set up E-Court account and grant delegation rights to Child Support staff so hands on training can occur.

Suggest having a separate e-mail account set up ahead of time for e-court notices to be directed to and to consider having designated staff that will regularly review and manage these notices.

**\*\* Set up may require assistance from your County IT staff \*\***

*All staff and attorneys set up with e-file accounts will receive the same email notices on every case action... this is an overwhelming amount of e-mails daily and there is no way at this time to segregate the e-mails to go to specific caseworkers. CCAP trainers can assist with individual e-mail settings for staff to route notices away from inbox if county chooses to delegate responsibility to specific staff.*

Ink type notary stamp required for documents that will need to be scanned to pdf in order to be e-filed. Only the Attorney has electronic notary option.

**Other helpful suggestions:**

✓ View E-Filing Demonstration: <http://www.wicourts.gov/ecourts/efilecircuit/training.htm>

*This demo is designed for the Attorney but does walk through basic process steps and provides an overview of what the judicial dashboard contains.*

✓ Suggest to do initial training with a limited number of staff to allow for more individual hands on training time as CCAP trainers are only on-site for a limited time.