GovLink October 27, 2022 Release Notes

Version 2.1

Contents

Parties Page Redesign

The Parties page (Step 2 of the Filing Stepper) has been redesigned to be easier to read and edit and to allow users to capture Party information that may be used to populate document templates from the Document Library. Each party now appears as an individual row; first, middle, and last names may be edited by clicking directly into the field, while the party's details may be added or edited by clicking the pencil icon, and the Party Type may be selected from the drop-down list. Party details for the party may be viewed by hovering the mouse over the Entity or Individual icon to the left of the party row.

Information contained in the Party Details fields may be used to populate templates created in your Document Library. New fields available for capture on Party Details include Address, DOB, and SSN; these fields may be inserted into document templates in the Document Library for auto-population when attaching to a Filing.

Please see the Documents and Videos sections of the Support Portal for a full walk-through.

Alias/AKA

A new field has been added to the Party Details screen to allows users to capture Aliases for parties as needed. The Alias field is also available to use as a data field in Document Library Templates.

Document Library

The new Document Library feature allows users with permissions to create and manage a library of document templates that can be used to create Filings that auto-populate some case-related data into the documents.

Permissions for Document Library

New Permissions have been added for Document Library in User Profile – Permissions under the Admin section. Location restrictions still apply. Expand Document Library by clicking the plus sign (+).

- Archive Document: Users with Archive Document permission can mark a document as archived. This makes the document unavailable to add to new Filings going forward, but does not completely delete it from the system, in case it is needed in future. Users with

this permission may also un-archive a document that has been previously archived in order to return it to an active status.

- Create Document: Users with Create Document permission can create new document templates from a blank canvas or by uploading a .doc or .docx file in the Document Library.
- Delete Document: Users with Delete Document permission can delete document templates from the Document Library.
- Edit Document: Users with Edit Document permission may edit the contents and attributes of document templates in the Document Library.
- Publish Document: User with Publish Document permission may change a document template from Draft to Published status, making it available for all users when creating Filings.
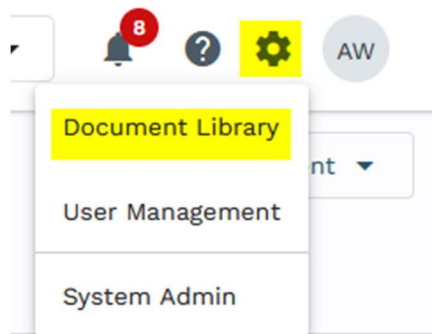
USER PERMISSIONS:

Admin
- Document Library
  - ✓ Archive Document ⓘ
  - ✓ Create Document ⓘ
  - ✓ Delete Document ⓘ
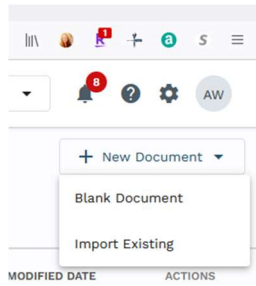 - ✓ Edit Document ⓘ
  - ✓ Publish Document ⓘ

Accessing Document Library

Users with the Create Document or Edit Document permission may access the Document Library by clicking the gear icon in the upper right corner and then selecting Document Library.

## Creating, Editing, Deleting, and Publishing Templates

Users with permission to do so may create new templates for use in the Document Library by clicking the gear icon in the upper right corner, selecting Document Library, and then clicking + New Document and selecting whether to start with a Blank Document or to Import Existing .doc or .docx file.

The user will be prompted to name the document template, select which court(s) this document template may be used in filings for, and select the Document Type(s) to apply to this template. After clicking Next, the editor appears and users may type in new text, change fonts and perform other standard document editing procedures, add in fields to auto-populate with case information, preview, Save as Draft, and Publish the document for use. For complete instructions on creating and editing a Document Library Template, please see our complete training documents and videos on the Support Portal.

Using a Template in a Filing

Once a document template has been published in the Document Library, users creating a Filing may choose to add it to their Filing. In Step 3 – Documents of the Filing Stepper, click Select File and then Document Library. The Document Library menu option is available if a template has been published for the Court associated to the filing.
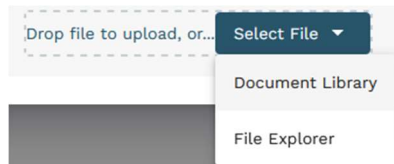
From the Document Library pop-up modal, select the document template(s) to attach to the filing by clicking the checkbox to its left and then click Add to Filing. The template will be attached to the filing with all available fields auto-populated, and user may edit as normal, if needed. For a complete walk through, please see our Documentation and Videos section of the Support Portal.

Combine Documents

A new select checkbox is available on the Documents step of the Filing Stepper to allow users to select multiple documents for combining. When more than one document is selected, the Split action icon changes to a Combine action and users may combine the selected documents into a single attachment for the Filing.

To combine multiple documents into a single attachment, select the documents you wish to combine by clicking the checkboxes to the left of their rows. Notice that the icon on the right has now changed to Combine, rather than Split. Click the Combine icon. Remove any unwanted pages by dragging them into the Unassigned tray on the left, reorder pages as needed, select a Document Type and enter a Description for the newly combined document as needed, then click Save to return to the Filing Stepper and your newly combined, single attachment (or cancel to cancel your actions and abandon the Combine action). For a full walk-through, please see the Documents and Videos sections of the Support Portal.

Reporting

A new menu option, Reporting, and four reports have been added to GovLink and users with permissions to do so may view, filter, and export them. For a full walk-through on Reporting, please see the Documentation and Videos sections of our Support Portal.

Reporting Permissions

New permissions have been added and may be accessed by going to User Management or an individual User's Profile and clicking Permissions, then expanding the Reporting sections in either Admin or Family/Domestic sections by clicking the plus sign (+). Location restrictions still apply.

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SETTINGS

Profile
Locations
Notifications
Permissions
Signature

USER PERMISSIONS:

Admin
+ Document Library
- Reporting
  ☑ Export Reports ⓘ
  ☑ Generate Reports ⓘ
+ User Management

Family/Domestic
+ eFile
+ Filing Administration
+ Manual Filing
- Reporting
  ☑ Export Reports ⓘ
  ☑ Generate Reports ⓘ

Export Reports: Users with the Export Reports permission may export report of this type (Admin or Family/Domestic filing information) to a CSV file which can be opened and edited in Excel or similar programs. Please note that the user must have Generate Reports permission in order to be allowed Export Reports permission.

Generate Reports: User with the Generate Reports permission may filter, sort, and generate reports of this type (Admin or Family/Domestic filing information). Please note that at least one Generate Reports permission must be turned on in order for the user to see the Reporting menu in GovLink.

Available Reports

To access reports, click the Reporting menu option at the top of the screen. There are two types of reports available in GovLink: Admin and Family/Domestic filing information reports. For each, once all required selections have been made, the Generate and Export buttons become available (based on User Permission); click Generate to return the results to the screen, or Export to CSV to export the results to a CSV file that can be opened in Excel or similar program. For a full walk-through on Reporting, please see the Documentation and Videos sections of our Support Portal.

Admin Reports

Audit Log: This report lists actions logged in GovLink. User must specify a specific date or date range (90-day range maximum) and a specific office location or multiple selected locations; and then select at least one of the following: a specific user, action type, Filing ID, Case/Docket ID (Civil Action Number), or External ID ($TARS number).

User Permission: This report lists user name, role, last login, permissions, delegated permissions and delegator, and location and may be filtered by these fields as well.

Family/Domestic

Filing Status Change: This reports shows the changes in status that have occurred on Filings in the time period specified (up to 90 day time-frame). Users may filter by date/date range, location(s), county(ies), Civil Action #'s, or Status Events (Filing Accepted, Filing Created, Filing Reworked, etc.).

Filing Status Snapshot: This report gives a snapshot summary of all Filings' statuses in a particular county or location as of a specific date. Please note that the status value is as of 23:59:59 GMT on the date selected.


Manually Accept/Reject Filings

Some courts do not accept eFiling through GovLink at this time. Filings and Cases created in GovLink for submission to these courts are printed by clicking Download & File in GovLink and then delivered to the court. To track the results of these Filings in GovLink, we have added the ability for users with permission to capture the Court's action by manually Accepting or Rejecting the Filings. For a full walk through of the Manual Accept/Reject process, please see our Documentation and Videos sections of the Support Portal.

Manual Filing Permissions

To navigate to the permissions, go to User Management or a User's profile, click Permissions, and expand the Manual Filing section by clicking on the plus sign (+).
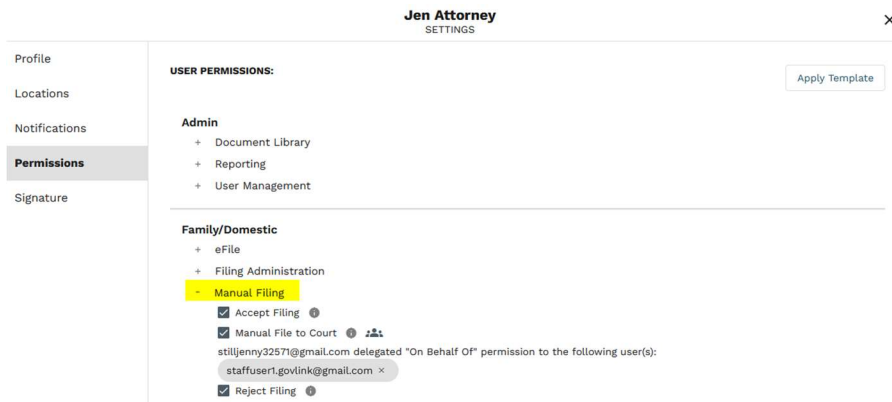
Accept Filing: Users with this permission may mark a Filing as Accepted by the Court and record the Civil Action Number assigned by the Court.

Manual File to Court: Users with this permission may click Download & File on a Filing whose destination court does not accept eFiling from GovLink. This is permission may be delegated to other users, allowing those users to mark a Filing as Submitted, on the delegating user's behalf.

Reject Filing: Users with this permission may mark a Filing as Rejected by the Court, capture the rejection reason(s), and allow the Filing to be Reworked.

Accepting or Rejecting a Filing

In a location whose court(s) accept manual file submissions, click the Submitted tab of the Filings screen. Click on the Filing to Accept or Reject and then click either the Accept or Reject button, as appropriate.
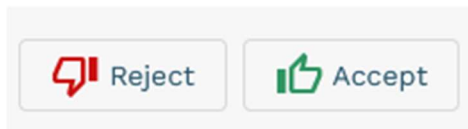
If Accepted, edit the Case Initiation Date, Case/Docket ID (Civil Action Number), Case Title, and/or Judge name as needed, then confirm by click Accept. If Rejected, edit the Rejection Date if needed and then enter the Rejection Reason(s), then confirm by clicking Reject. For a full walk through, please see the Documentation and Videos sections of the Support Portal.

PNG Signature Files

Users with eSign permission enabled may now upload signature files as a PNG type, not just a JPG type. Signature image files may be uploaded under user profile, Signature.

Days in Status

A new column has been added to the Filings display screen that reflects the number of days this Filing has been in the displayed status. The Days in Status column appears on all Filing statuses (Unfiled, Submitted, Accepted, Rejected, and All).

Compile & Download

The Compile & Download button has been added to all Filing statuses in the Case View; previously, Compile & Download was only available on Filings with an Accepted status. Compile & Download combines all attachments into a single file, downloads it to the user's computer, and opens the file so the user may see it, save it to their own system, or print it.

Performance

We have made some enhancements to speed up the loading of the Filings – Unfiled listings page.