Get to know

GOVLINK

For the Wyoming Child Support Program

V1.7

GET TO KNOW

GOVLINK

Welcome to GovLink! This guide will help you use GovLink quickly and successfully, as well as give you an easy point of reference for those actions you may not perform every day. This guide is a compliment to the videos you can watch at https://support.govlink.us/category/wcsp/ Bookmark that page so you can visit often – we add new material as GovLink evolves.

Please ask questions and share your thoughts with us:

- Chat online at https://wcsp.govlink.us/home (Monday – Friday, 8:00 AM-5:00 PM MST)
- Email to info@govlink.us
- Call 844-LUV-4-GOV (Monday – Friday, 8:00 AM-5:00 PM MST)

We're so excited to help you get the most out of GovLink and look forward to working with you!

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SET YOUR PASSWORD (FIRST VISIT)

1. Visit https://wcsp.govlink.us/home
2. On your first visit, click "Forgot Password?"
3. Enter your username (your wyo.gov email address) into the username field.
4. Look for a new email message that includes a link to reset your password.
5. Click the link, choose a new password, and log in.

LOG IN

1. Visit https://wcsp.govlink.us/home
2. Enter your username and password.
3. Upon logging in, you will see your dashboard.

LOG OUT

To log out, click your initials in the top-right corner, then click "Logout."

GovLink will automatically warn you after 10 minutes of inactivity, then automatically log you out after 15 minutes of inactivity.

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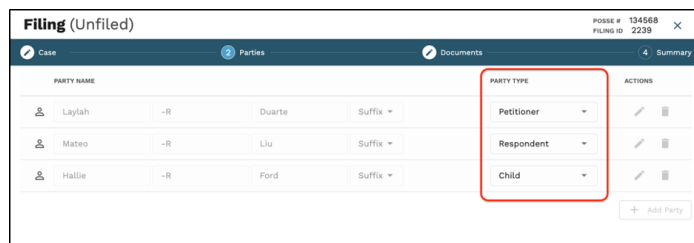
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CREATE A NEW CASE

1. Click the New Case button at the top right of your screen to launch the case wizard.

2. Enter in the POSSE case number at the top of the screen and click 'Import Data.'

3. Verify the information that auto populated into the appropriate fields.

4. From the drop down, select the Attorney at the local office and Filing Category.

5. If applicable, fill in the Related Civil Action # and/or Related POSSE # before hitting next.

6. Click Save to save your progress and exit the wizard to finish later, or click Next to proceed to the Parties tab.
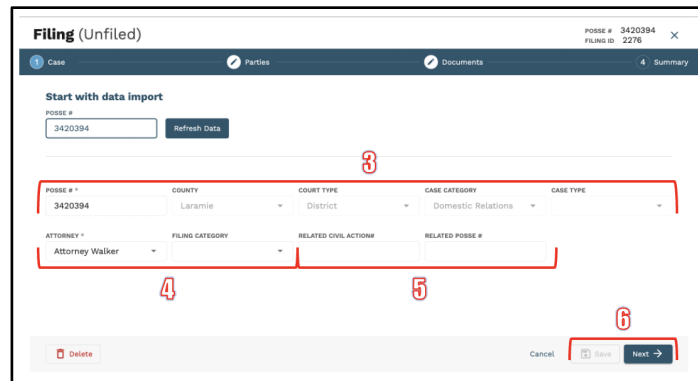
7. The party names will auto generate as they appear in POSSE.

8. Users will select the party type for each party name from the drop down menu on the right side of the screen.

9. You are able to view party information by hovering over the person icon next to each party member.

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10. If party names are incorrect, they will need to be corrected in POSSE and then refreshed in GovLink.

11. Click the Follow icon to turn off notifications for this case (Follow is turned on by default for new cases).

12. Click Cancel to exit the wizard or Next to proceed to the Documents tab.

13. In the Documents tab of the wizard:
    a. Drag & Drop your document into the Drop Zone, or click 'File Explorer' to select your files from your system.

    b. Select the Document Type from the drop-down list. This is a required field.
    c. Optionally, add a description to the description box.

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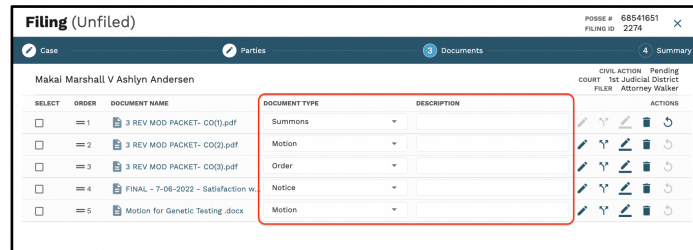
d. A user can also add a template to the filing by selecting 'Document Library' in the Select File drop down.

e. The user is able to search for the templates in the library and select the templates they would like to add and then click 'Add to Filing'

f. The party and case data from POSSE will automatically populate into the template.

g. All documents added to the filing, including templates are able to be edited using the available tools next to each document.

   i.   Edit – Click the Edit icon to make edits on the document.

   ii. Split – Click the Split icon to split a multi-page document into separate documents.

   iii. Combine- Select the documents and click the combine icon to merge documents.

   iv. Sign – Click the Sign icon to insert electronic signatures/initials into the document.

   v.   Delete – Click the Delete icon to delete an unfiled document.

14. Click the Follow icon to turn notifications for this case on or off.
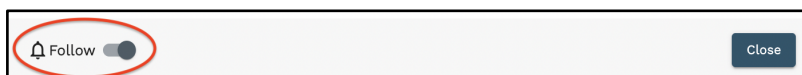
15. Click Save to save your progress and exit the wizard. You can come back later to continue your work.

16. Click Next to proceed to the Summary tab:

17. In the **Summary tab** of the wizard.

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a. Review the documents you are including in this filing. Click the Prev button if you need to return to the Documents step of the wizard and make any changes.

b. Assign this filing to another user by selecting that user's name from the drop-down box.

c. Add any internal notes to this filing.

d. Add notes for the POSSE Case Action Log (CAL).

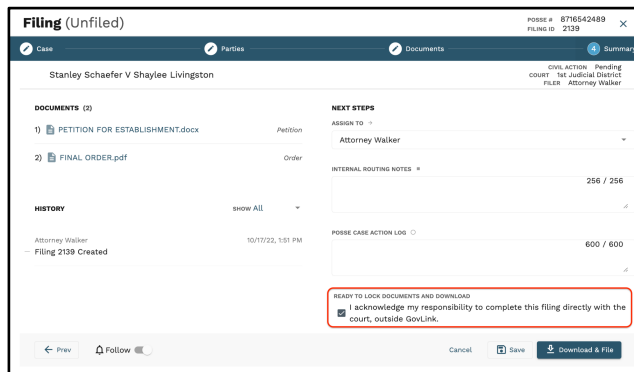Need Help? Click the green chat bubble in the bottom corner of GovLink or call us at 844-LUV-4-GOV
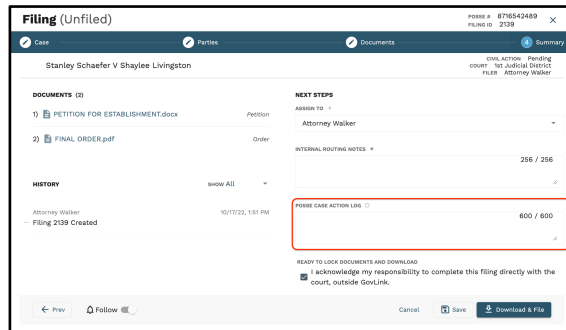
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e. If you have filing permissions and are ready to save and download to manually file with the court, click the checkbox next to 'I acknowledge my responsibility to complete this filing directly with the court, outside GovLink' and then click File.

f. If the user does not have permission to file, they are able to assign to a different user and click 'Save' to assign that case. You can also click the 'Save' button if you'd like to simply save your work and exit the Filing Wizard.

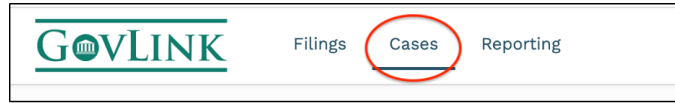## FIND A CASE

1. Click Cases at the top of your screen.

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2. You must first select if you are search within just your cases OR all cases at that specific location, then:
   a. the County to be searched, AND then enter either
   b. the Case/Docket ID (also referred to as the Civil Action Number) OR
   c. Part or all of a Party's First and Last names.

3. Once the required fields have been filled, the Search button will become clickable.
4. User may also expand Advanced Filters and
   a. Enter part or all of the POSSE number
   b. Searching by party type
   c. Searching by party entity
   d. The additional options of Court Type, Case Category and Case Type cannot be altered at this time.

5. Click "Search".
6. View the results of your search below the search box. Click any column heading to sort the results.

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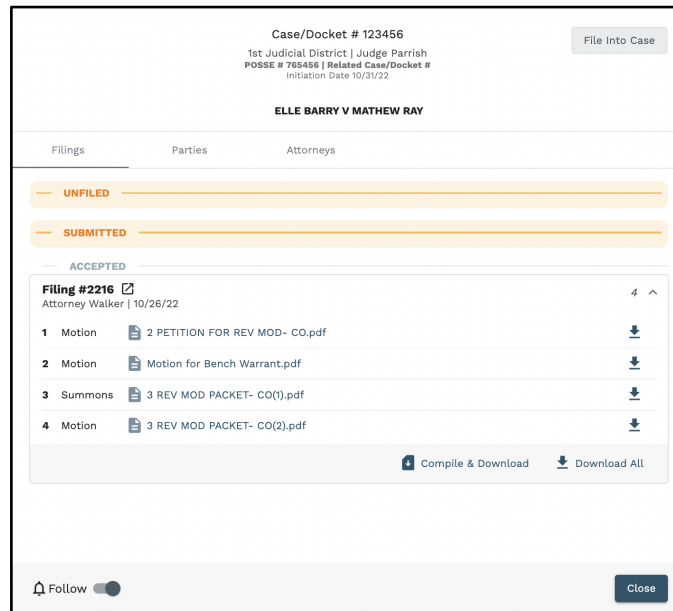
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VIEW THE DETAILS OF A CASE

First, locate the case by following steps in "Find a case". This must be a case that has been created in GovLink. If you are unable to locate the case, contact us by clicking the green Chat bubble on the bottom left of your screen (Mon-Fri 8-5 MST) or by calling 844-LUV-4-GOV for assistance. Once you have located the case:

1. Click anywhere on the case to open the Case Information pop-up box.
2. Review filings by categories of Unfiled, Submitted, and Accepted.
3. Click
   a. individual document rows to view the document
   b. the download arrow next to a document to download that document only
   c. the download all button to download all filings on this case
   d. the Parties or Attorneys tabs to view parties or attorneys associated with this case.

4. Click the Follow icon to turn notifications for this case on or off.

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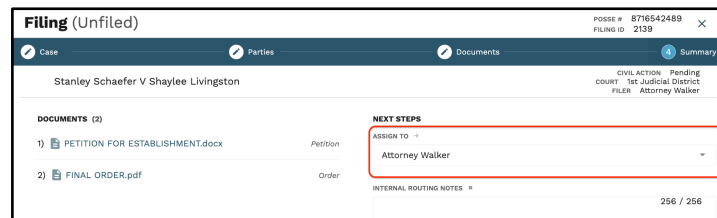
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FILE ONE OR MORE DOCUMENTS INTO AN EXISTING CASE

First, locate the case by following steps in "Find a Case". **This must be a case that has been created in GovLink.** If you are unable to locate the case, contact us by clicking the green Chat bubble on the bottom left of your screen (Mon-Fri 8-5 MST) or by calling 844-LUV-4-GOV for assistance. Once you have located the case:

1. Click anywhere on the case to open the Case Information pop-up box.
2. Click the File Into Case button to launch the filing wizard.
3. You will be taken to the summary tab of the filing stepper::

    a. Review the documents you are including in this filing. Click "Prev" if you need to return to the Documents step (See step 4 for how to upload documents).

    b. To assign this filing to a different user, select that user's name from the drop-down box.

    c. OPTIONAL Add internal notes (visible within GovLink only).
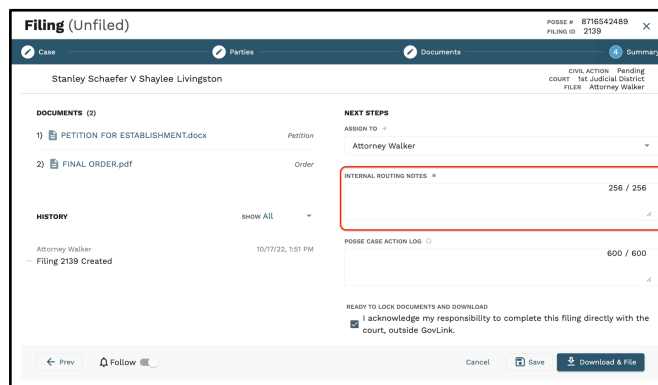
    d. Add notes for the POSSE Case Action Log (CAL).

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e. If you have filing permissions and are ready to download to manually file with the court, click the checkbox next to 'I acknowledge my responsibility to complete this filing directly with the court, outside GovLink.'

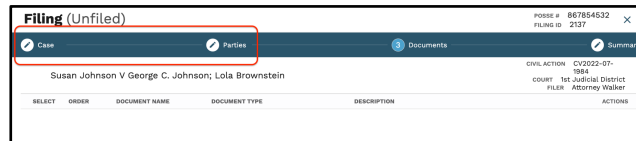f. To save your work and exit the Filing Wizard, click Save.

4. **How to edit existing information:**

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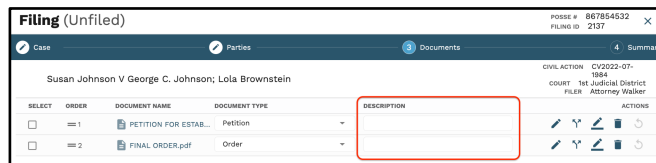a. The Case & Party information will auto-fill based on the case you were on when you clicked New Filing.

b. Drag and drop your document into the Drop Zone or click 'Select File' to select your files from your system.

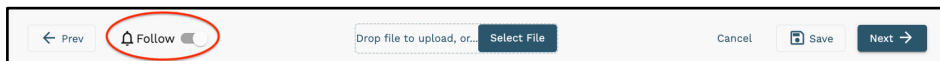c. Select the **Document Type** from the drop-down list. This is a required field.
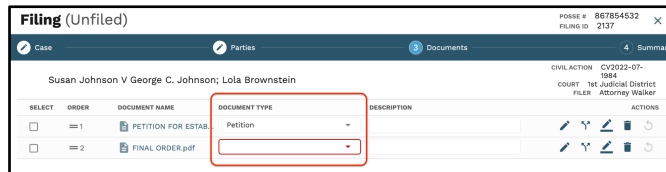
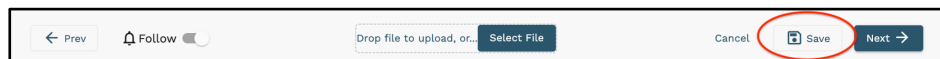d. Optionally, add a description to the **description box.**

e. Repeat these steps for as many documents as you need to add.

f. To make changes to an uploaded document, see the following section.

5. Click the **Follow icon** to turn notifications for this case on or off.

6. **Click Save** to save your progress and exit the wizard. You can come back later to continue your work.

MAKE CHANGES TO AN UPLOADED DOCUMENT

1. **Edit** – Click the Edit icon to make edits on the document ✏️

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![GovLink logo]

a. Once a document is in the editable version, the user may edit the document by using the tools on the right-hand side of the page.

b. Any text within the document has the ability to be edited.

2. **Split** – Click the Split icon to split a multi-page document into separate documents.

   a. Select the desired document on the right in the "Unassigned" column.

   b. The user will drag the document(s) into the appropriate trays, outlined in a dotted grey box on the right.
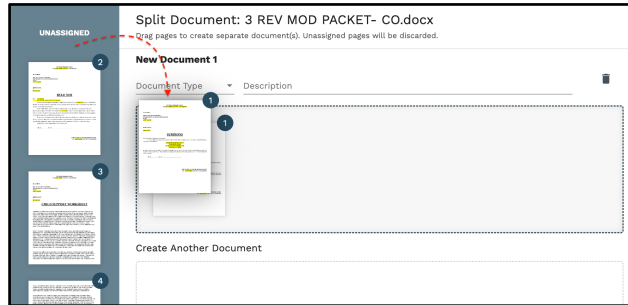
   c. If multiple pages are found within a tray, the user can rearrange the pages.
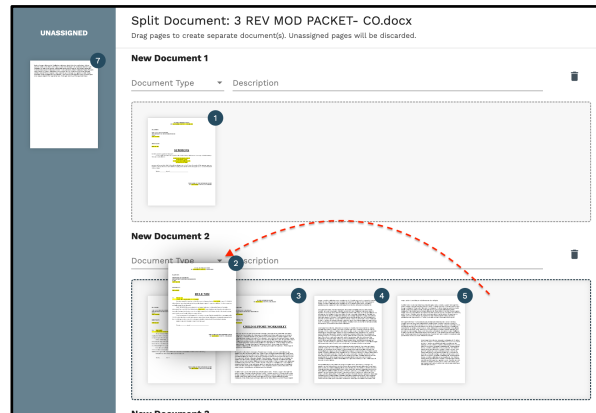
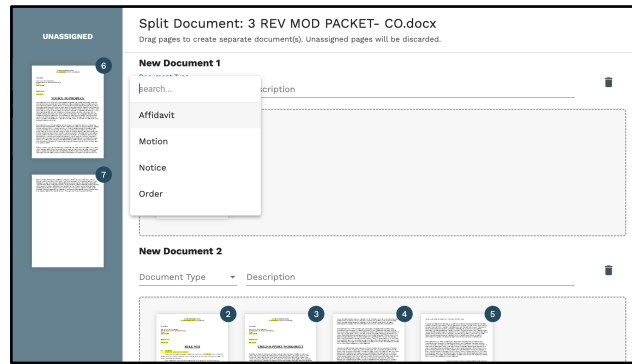   d. Users are encouraged to name the Document Type before saving. Users may also add a document description.

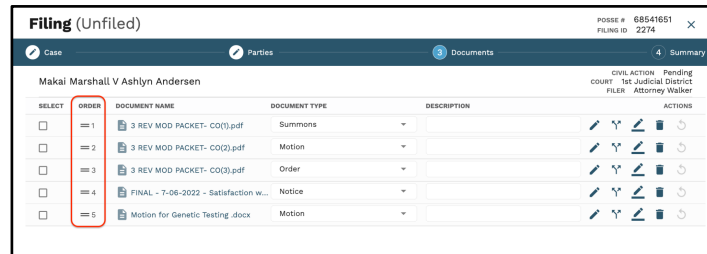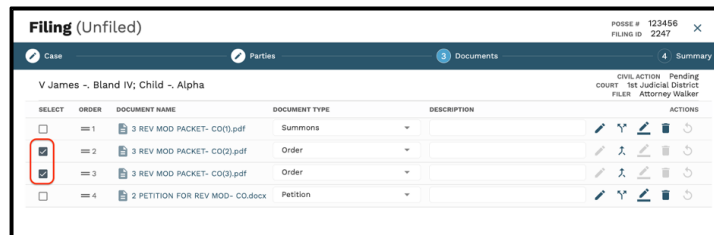Need Help? Click the green chat bubble in the bottom corner of GovLink or call us at 844-LUV-4-GOV

e. Any documentation left in the "Unassigned" column will be discarded and not compiled to be filed to the court.

f. Once saved, users may reorder documents on the right side of the page under "Order."

3. **Combine**- Combine multiple documents into one document.

   a. To combine multiple documents, select the desired documents on the left side of the screen.

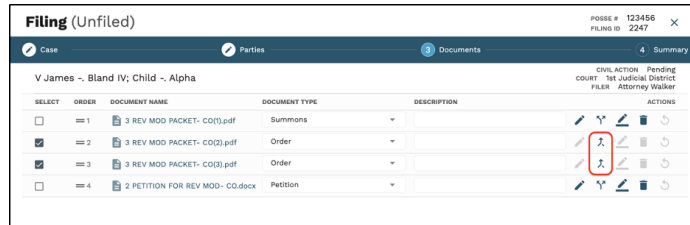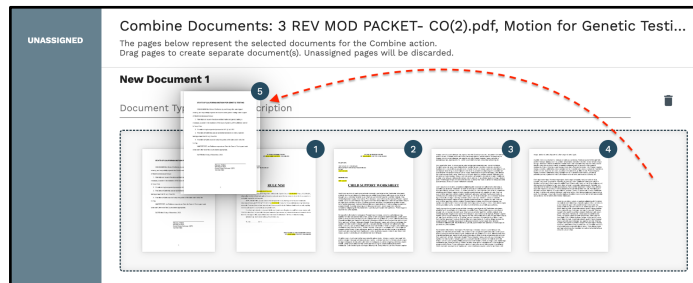Need Help? Click the green chat bubble in the bottom corner of GovLink or call us at 844-LUV-4-GOV

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b. The split document button will change to combine documents for the documents selected.

c. Users will be able to reorder pages while combining documents.

d. Users are encouraged to name the Document Type before saving. Users may also add a document description.

e. Any documentation left in the "Unassigned" column will be discarded and not compiled to be filed to the court.

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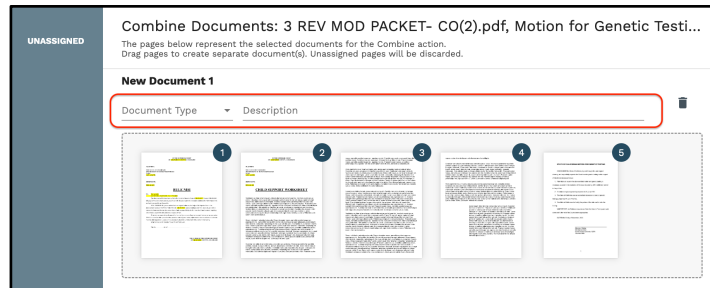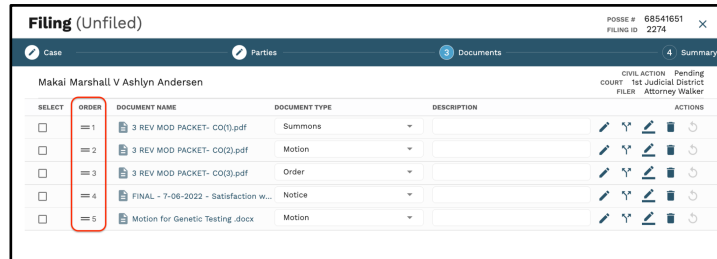g. Once saved, users may reorder documents on the right side of the page under "Order."

4. **Sign** – Click the Sign icon to insert electronic signatures/initials into the document.

   a. If given permission to sign, user will select the signature at the top of the document and wait until the signature box turns blue.

   b. Once blue, the user will select the area they would like to drop and insert the signature.
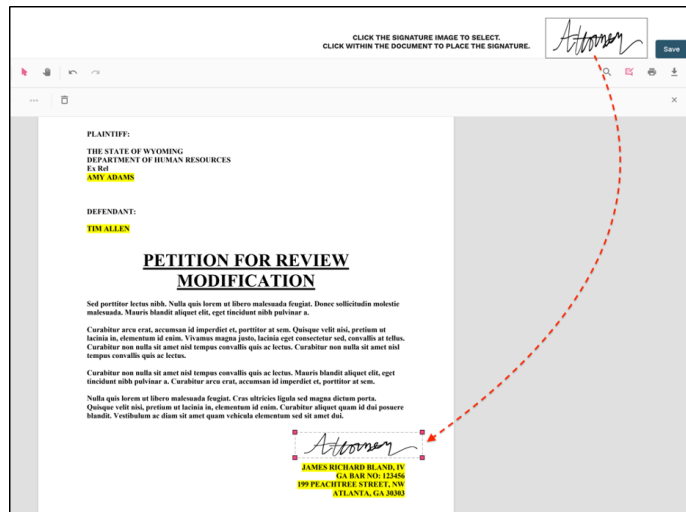
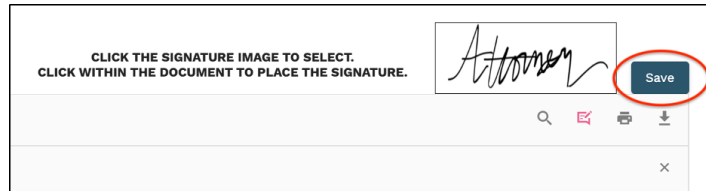Need Help? Click the green chat bubble in the bottom corner of GovLink or call us at 844-LUV-4-GOV

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c. To drop the signature, the user will click on that area of the document and then click 'Save.'

5. **Delete** – Click the Delete icon to delete an unfiled document.

      a. To delete a document, select the delete icon.

      b. A signed document cannot be deleted and will have to be reworked.

6. **Rework** – To rework or correct a document, select the rework icon on the right side of the page.

      a. Rework icon is only activated when reworking a document that has already been signed or rejected.
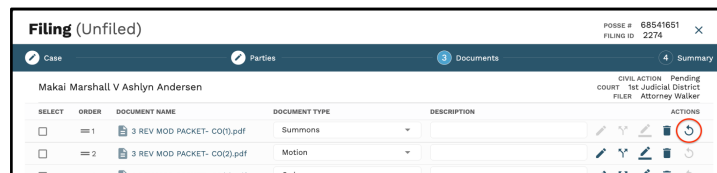
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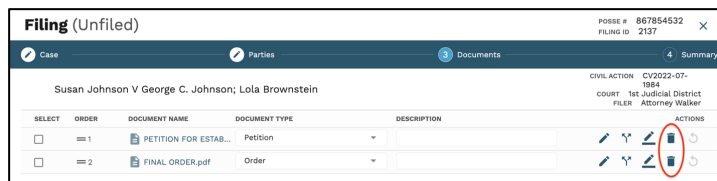
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FIND AN INDIVIDUAL FILING

1. Find a specific filing or groups of filings using any combination of the following:
    a. Verify or change the associated location by using the location drop-down box.
    b. Click the desired filing status of Unfiled, Submitted, Accepted, Rejected, or All.
    c. Select to whom the filing is currently assigned from the Assigned To drop-down list
    d. Select the person that created the filing from the Created By drop-down list
    e. Enter a Party Name, the POSSE Number, or Case Number in the Search box.
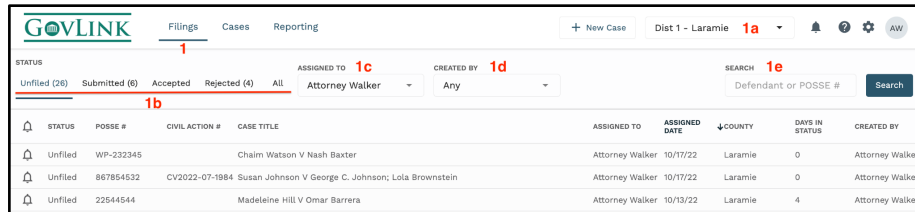
2. Click the 'Search' button.
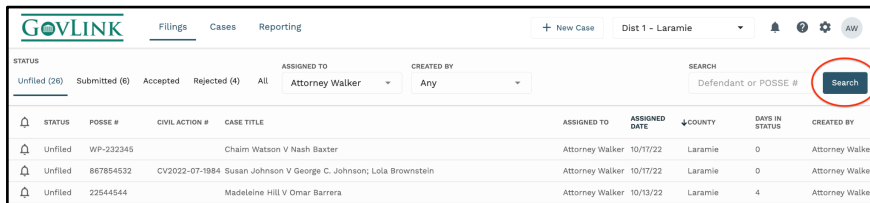
3. All filings matching any of the criteria you selected or entered are displayed in the main part of the page and results may be sorted by clicking the status header.

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PROCESSING REJECTED FILINGS

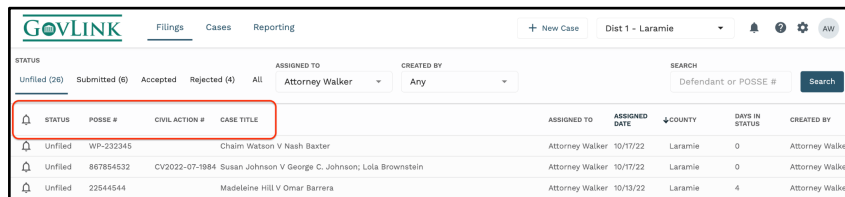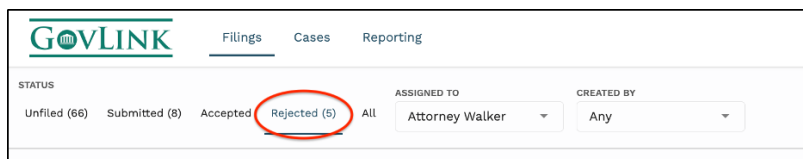GovLink provides the tools to delete or rework filings that have been rejected by the Clerk's office.

1. Once a filing has been manually 'Rejected', the user will be able to locate that filing in the 'Rejected' tab on their dashboard.

2. To rework the filing, the user will need to click the ReWork icon to the far right of the dashboard for that case.

3. Click 'OK' in the pop up to confirm you would like to proceed with the ReWork.
4. The user can now locate that case in the 'Unfiled' tab on their dashboard and the user will be able to click into the case from there and make the corrections before resubmitting the filing.
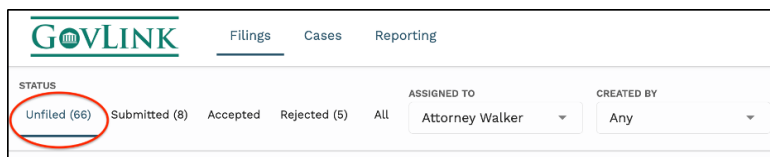
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DELETING A REJECTED FILING

The Delete icon (trash can) allows users to delete Rejected Filings that they created but are no longer needed. Users with permission to do so can also delete Rejected Filings that were created by others but are no longer needed. To delete a filing, click the trash can and then confirm you want to continue to delete by clicking Delete on the pop-up box that appears. To abandon deleting this record, click Cancel in the pop-up box.

Deleting a filing will result in notifications to followers of the Filing as well as CAL Updates being automatically logged when appropriate to do so.

REWORKING A REJECTED FILING

The Rework icon allows users to open the Filing and correct the problem(s) that resulted in Rejection.

To begin reworking a Filing, click the Rework icon to the right of the Rejected filing.

- A pop-up box indicating that continuing will change this Filing's status from 'Rejected' to 'Unfiled' appears; to proceed, click OK. To return to the menu without reworking this filing, click Cancel.
- After clicking OK, the Filing Stepper will be loaded to step #4, summary. Here you will be able to see the reason(s) for rejection in the History.
- The reason(s) for Rejection can be viewed by hovering your mouse over the red exclamation point at the top of the Filing Stepper. It will also be listed in the case history section of the summary tab. Whatever the clerk's office entered for Rejection reason(s) will be displayed here and remains visible upon hovering throughout the File Stepper.
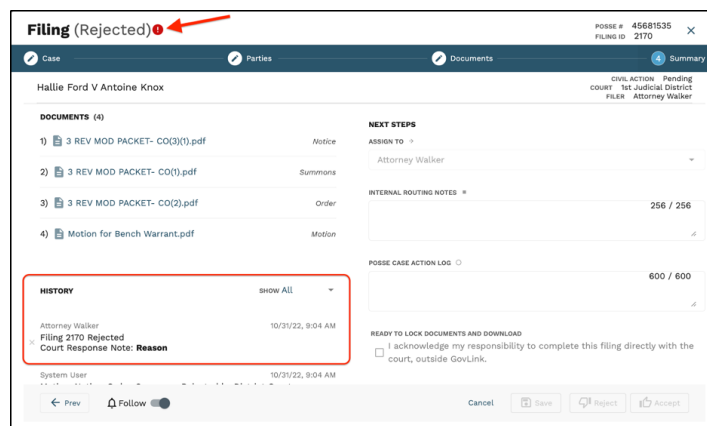
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- Using the rejection reasons as your guide, edit, delete, split, sign, and/or add documents as needed. If a document is locked and needs to be edited, click the Rework icon next to that document in order to unlock it and then you can proceed to edit, split, or sign as usual.
- Sometimes, a rejection reason may indicate a problem with the Case information or Parties; if so, click Previous in the File Stepper to navigate to the appropriate screen and make the necessary changes there or within POSSE. When finished, click 'Refresh Data' or click Next to proceed to the next step.
- When you believe you have made all of the appropriate and needed changes, updates, etc., proceed to the next step in your standard operating procedure for this Filing just like you would if it were the first time you were working on it and it hadn't been rejected. I.E., assign to the next person who should work on or review it, make your Internal and/or POSSE CAL Update Log notes, or download to file.
- Reworking a Rejected filing will trigger all of the usual notifications to users who are following the filing. If users have their notifications turned on, they will receive emails notifying them of changes to assignment or status just like they would with a new Filing. Rework done on a Rejected filing will also send CAL Updates automatically when appropriate.
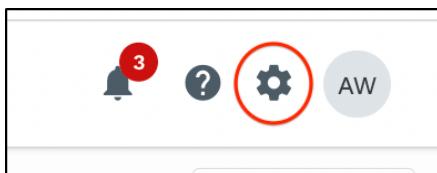
USER MANAGEMENT

GovLink provides the tools to create new users and manage the settings for existing users:

- Profile (username, name, role, bar number, address and phone number)
- Role (e.g.,attorney, case worker, legal assistant)
- Local Office(s)
- Notifications (filing status change, court updates, filing assignment change)
- Permissions (delete filinigs, sign, add users and edit users)
- Signature (upload a signature file for users with Signing permission)

LAYOUT

- For each user who has permissions to add or edit user accounts, a gray gear icon appears to the left of the user's initials.

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- Click the gear, then click "User Management."
- The User Management page displays a list of all users who are associated with the given location. Find a specific user or group of users by searching with any combination of NAME, LOCATION and ROLE.

- To edit a user, click the row containing the user's name to open that user's Settings page.
- **The Profile tab** captures required information (username, first name, last name, role and bar number) and optional information (middle name, suffix, street address, city, state, zip code and phone number). Please note that for user role of 'Attorney', both a Bar number and an address selection are required. An address may be entered for the Attorney, or check the Utilize Local Office Address to use the filing office's address for the attorney.

- **The Locations tab** captures the locations that are associated with the user. Add or remove a location by checking or unchecking the corresponding box.

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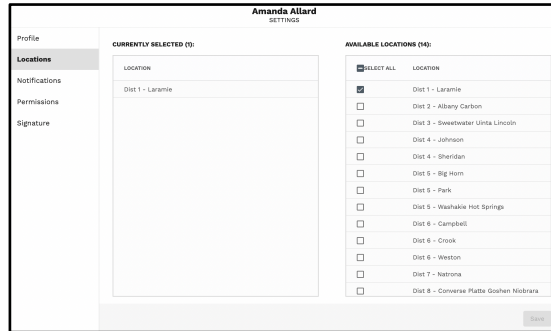
- **The Notifications tab** controls the flow of email alerts for events tracked within the system. Toggle each type of notification (filing status change, court updates, filing assignment change).
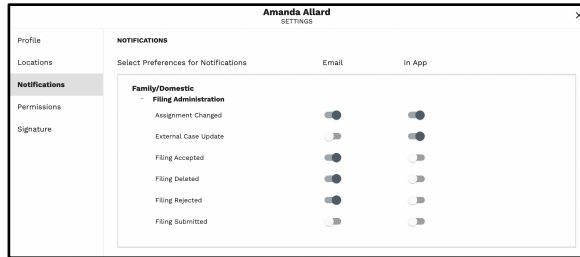
- **The Permissions tab - ADMIN:** captures the decisions regarding the user's ability to perform certain actions within GovLink:
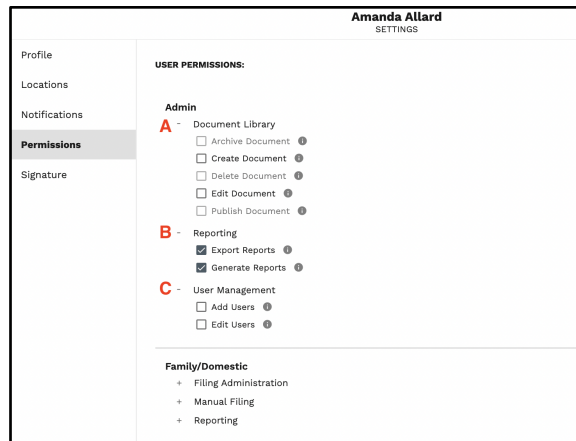
- ○ **Document Library:** Once a user has clicked both Create Document and Edit Document, all other document library permissions will become clickable.

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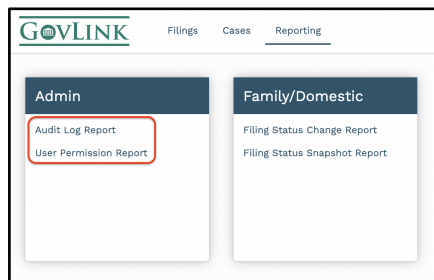○ **Reporting:** User will not see the reporting option at the top of their dashboard if they don't have reporting permissions.

■ **Generate Reports:** Gives users the ability to create Audit Log Report and/or User Permission Report.

■ **Export Reports:** Gives users the ability to export the generated admin reports into an excel file.

○ **User Management:**

■ **Add Users:** This permission gives the user the ability to create new users in GovLink.

■ **Edit Users:** This permission gives the user the ability to edit permissions for existing **GovLink users.**

● **The Permissions tab - FAMILY/DOMESTIC:**
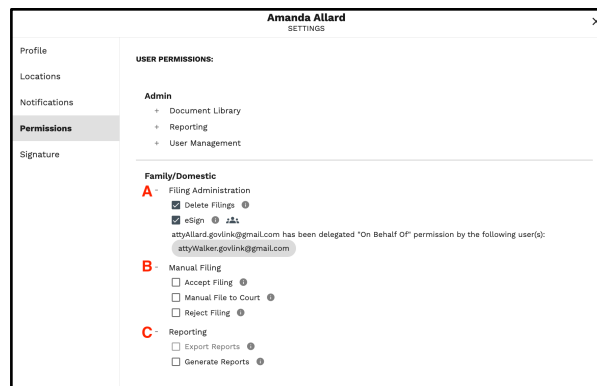
○ **Filing Administration:**

○ **Delete Filings:** All users have the ability to delete filings they created themselves, as long as the filing is in 'Unfiled' or 'Rejected' status. This permission enables users to also delete 'Unfiled' or 'Rejected' filings created by other users.

○ **eSign:** This permission gives the user the ability to insert a signature image into a document. This permission is only given to Attorneys unless there is a special circumstance approved by leadership.

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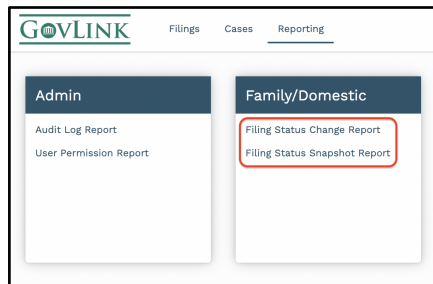
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- **Manual Filing:**
  - ○ **Accept Filing:** Allows user to manually accept filings that are manually submitted.
  - ○ **Manual File to Court:** This permission gives the user the ability to download and manually file with the appropriate court at locations. This permission is only given to Attorneys unless there is a special circumstance approved by the admin.
  - ○ **Reject Filing:** Allows user to manually Reject filings that are manually submitted.
- **Reporting:** User will not see the reporting option at the top of their dashboard if they don't have reporting permissions.
  - ○ **Generate Reports:** Gives users the ability to create Filing Status Change Report and/or Filing Status Snapshot Report.
  - ○ **Export Reports:** Gives users the ability to export the generated Family/Domestic reports into an excel file.

- On the Profile and Locations tabs, click "Save" to store changes. Notifications & Permissions tabs will auto-save.
- To close the window, click the "X" in the top right corner.
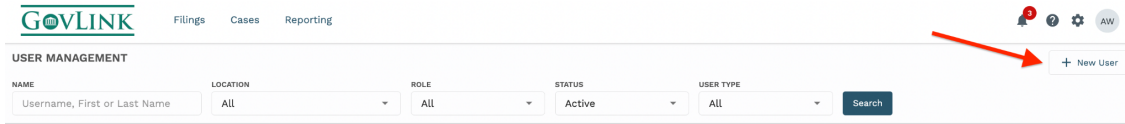
CREATE A NEW USER

To add a new user that does not yet appear in GovLink:

- To add a new user, click "New User"

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- Complete the required information on the Profile tab.
- The email address must be unique in order to create the new user.
- Click "Save" to create the new user and trigger an email notification to the new user.
- Proceed to the Locations, Notifications and Permissions tabs. Don't forget to SAVE when prompted.
- To close the window, click the "X" in the top right corner.

💡 Best Practice: Always search for the user's email address or name before creating a New User to avoid

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