# Get to know

# GOVLINK

## Louisiana Child Support Enforcement

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/lcse

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://lacse.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)

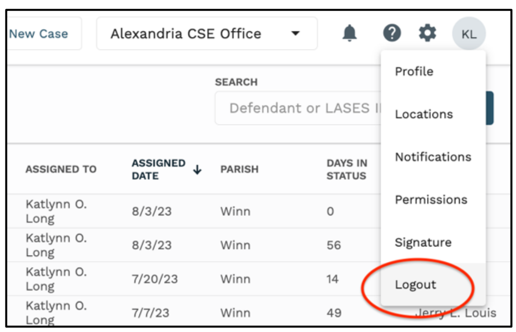
1. Visit [https://lacse.govlink.us/home](https://lacse.govlink.us/home)
2. On your first visit, click “Forgot Password?”
3. Enter your username (your wyo.gov email address) into the username field.
4. Look for a new email message that includes a link to reset your password.
5. Click the link, choose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

## LOG IN

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

## LOG OUT

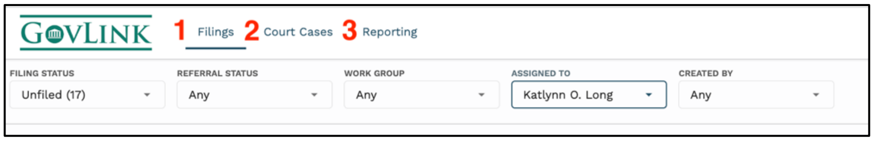
To log out, click your initials in the top-right corner, then click “Logout.”




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

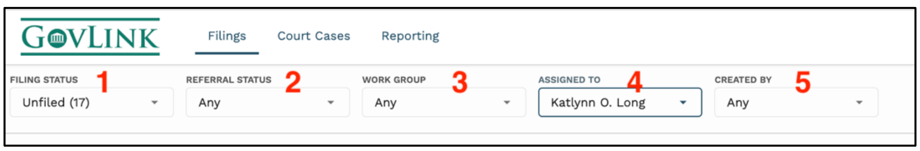
## DASHBOARD OVERVIEW

Once a user logs into GovLink, they will be taken to their dashboard that contains their office’s particular workflow.




1. **Filings:** Under this tab users can see filings that are waiting for action to be taken, submitted to the court, accepted, and rejected filings for specific users or work groups.
2. **Court Cases:** Click this tab to search existing cases within GovLink.
3. **Reporting:** Users will have access to click this tab is they have permissions turned on to generate Admin and/or family domestic reports.

**Filtering your dashboard:**




1. **Filing Status:** users can flip through different filing status of Unfiled, Submitted, Accepted, and Rejected.
2. **Referral Status:** If a filing has a referral associated with, users can filter their dashboard to see referrals that are currently in a particular status.
3. **Work Group:** If a user is associated with a particular work group, they can filter their dashboard to see filings associated or assigned to their specific work groups.
4. **Assigned To:** User can filter filings on their dashboard to see only filings have been assigned to a specific user. If you want to see filings that currently do not have a user assigned, select 'pending assignment.'
5. **Created By:** Users can filter filings on their dashboard to see filings have been created by a specific user.


1. **New Case:** Start a new case within GovLink by click the New Case button. Initially, users will need to start **all** filings as new cases within GovLink.

2. **Location:** If a user is associate with one or more locations, they will be able to select the location from this drop down.
3. **In-App Notifications**: If a user has elected to have any in-app notification turned on, this is where those notifications will appear.
4. **Support Page:** Users can find step by step user guides and/or quick videos to walk you through any questions you may have while working in GovLink.
5. **User Management:** From the User Management drop down, users can add/edit users, create/edit work groups, or create/edit templates. All actions under this drop down are user-based permissions.
6. **User Settings:** This is where the user who is logged in can see their specific user settings. This is also where all users can turn on or off any type of notification they would like to receive.

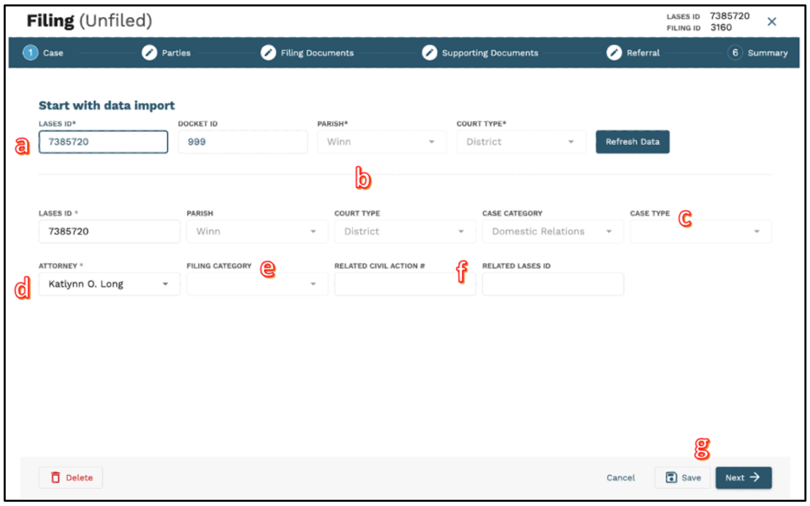
## CREATE A NEW CASE – WITH A REFERRAL

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


**2. Step 1 – Case:**

- **a.** Enter in the LASES case number at the top of the screen and click 'Import Data.'
- **b.** Verify the information that auto populated into the appropriate fields. This information will appear greyed out and cannot be edit by a user.
- **c.** Select the Case Type from the drop down.
- **d.** From the drop down, select the Filing Attorney.
  - i. If you do NOT know who the filing attorney will be on this filing, select 'pending attorney' from the drop down.
- **e.** Filing Category is not applicable until offices begin eFiling with the court.
- **f.** If applicable, fill in the Related Docket ID # and/or Related LASES #'s before hitting next.

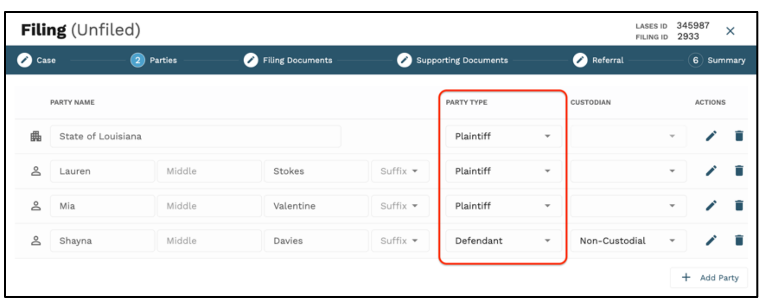
**g.** Click Save to save your progress and exit the wizard to finish later, or click Next to proceed to the Parties tab.



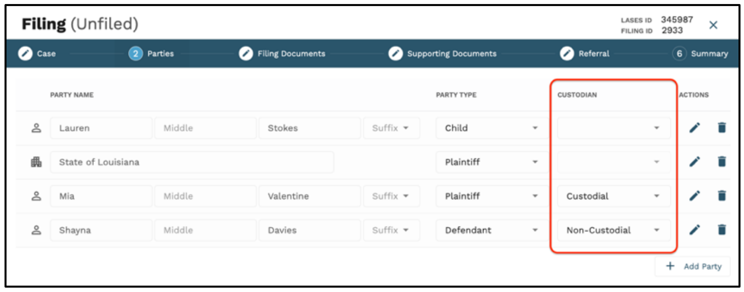

**3. Step 2 – Parties:**

**a.** The party names and information associated with the LASES number will auto generate as they appear in LASES.

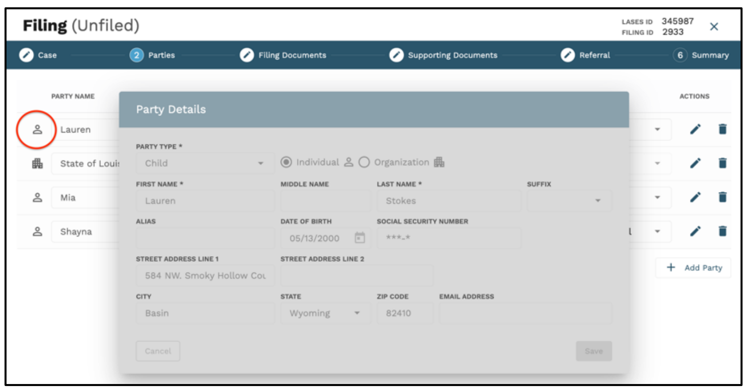
**b.** If the Party Type is not automatically pulled in from LASES, users will select need to select the party type from the drop-down for each party brought in from LASES.




**c.** Differentiate the Custodial and non-custodial parent by selecting from the drop down in the Custodial column. This is not a required field; however, it will be beneficial if your office is utilizing templates.




**d.** You can view party information by hovering over the person icon next to each party member's first name.



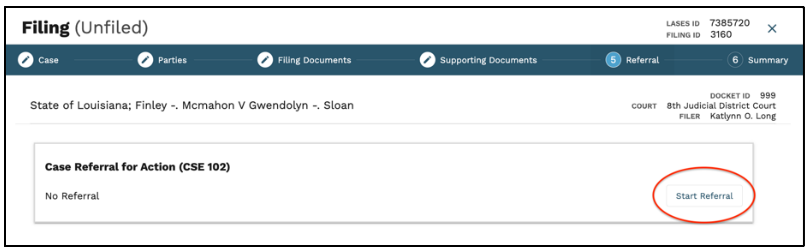

**e.** If party names or information is **<u>incorrect,</u>** you will need to correct the information in LASES first. Once the information is correct in LASES, go back to the step #1, case in GovLink and click 'Refresh Data'. The updated information will populate automatically.


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

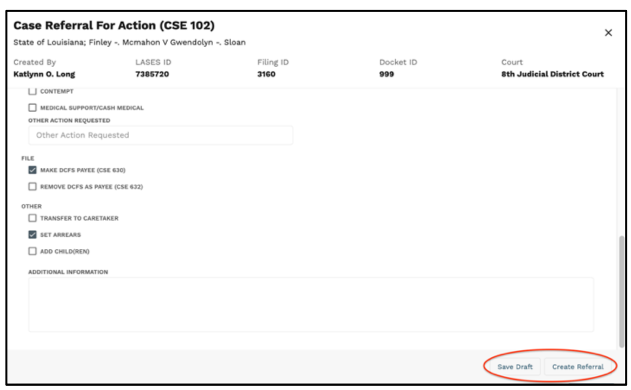
**4. Since this is a referral only workflow**, skip Step 3 – Filing Documents and Step 4 – Supporting Documents by clicking the 'Next' button at the bottom of the filing stepper until you're on step #5, Referral.

**5. Step 5 – Referral:**

**a.** Click the Start Referral button.

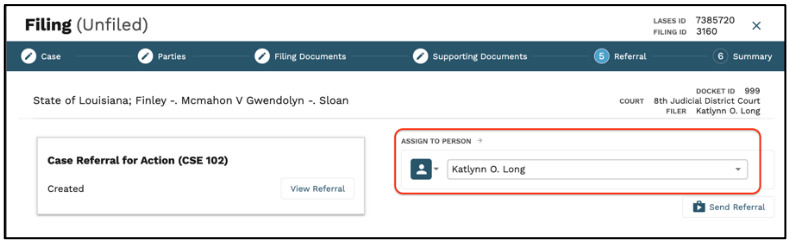



**b.** Complete the CSE 102 Referral form with the necessary information. Once complete, click the 'Create Referral' button at the bottom of the form. If the CSE 102 form is not complete and the user needs to come back to it, they can simply select 'Save.'

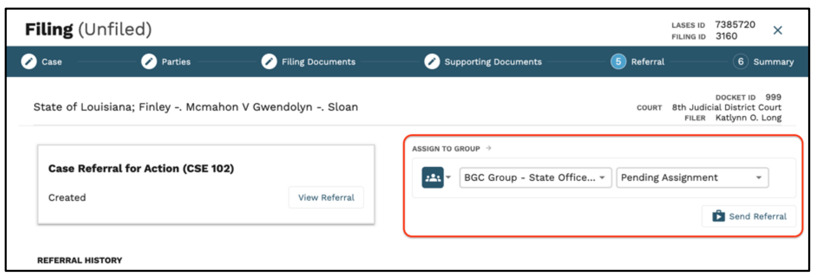



**c.** Assign the Referral under the Assign To section on the Referral Step of the filing stepper.

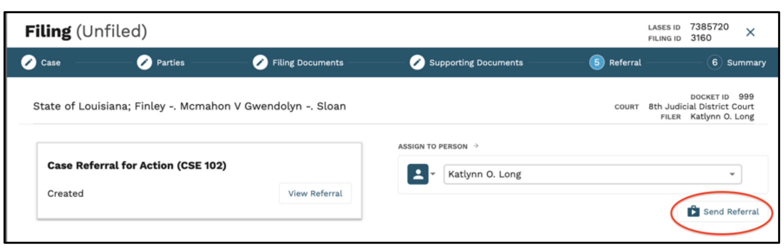
i. **Assign to an individual** by selecting the single person icon from the drop down and then select the person's name you wish to assign the referral to.




ii. **Assign to a work group** by selecting the Work Group icon from the drop down and then first select the work group you are assigning the referral to. If you know the individual within the work group that the referral is being assigned to you can select their name from the second drop down. If you do not know the individual within the work group that the referral is being assigned to, select 'Pending Assignment' from the second drop down.




**d.** Click the 'Send Referral' button.

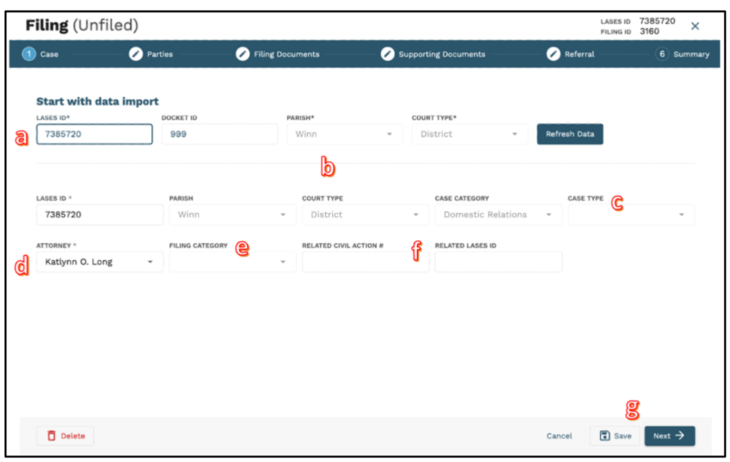



**e.** If no further action is needed, exit out of the filing by clicking the 'X' in the upper right-hand corner of the filing stepper.

## CREATE A NEW CASE – WITHOUT A REFERRAL

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

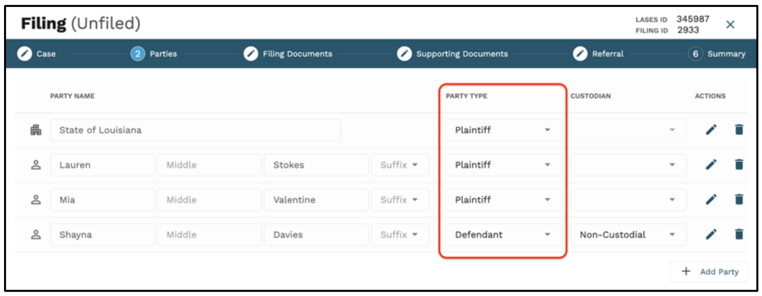

2. **Step 1 – Case:**
   a. Enter in the LASES case number at the top of the screen and click 'Import Data.'
   b. Verify the information that auto populated into the appropriate fields. This information will appear greyed out and cannot be edit by a user.
   c. Select the Case Type from the drop down.
   d. From the drop down, select the Filing Attorney.
      i. If you do NOT know who the filing attorney will be on this filing, select 'pending attorney' from the drop down.
   e. Filing Category is not applicable until offices begin eFiling with the court.
   f. If applicable, fill in the Related Docket ID # and/or Related LASES #'s before hitting next.
   g. Click Save to save your progress and exit the wizard to finish later, or click Next to proceed to the Parties tab.



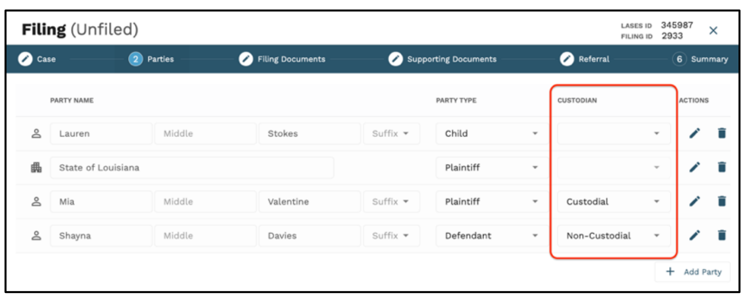

3. **Step 2 – Parties:**

**f.** The party names and information associated with the LASES ID will auto generate as they appear in LASES.

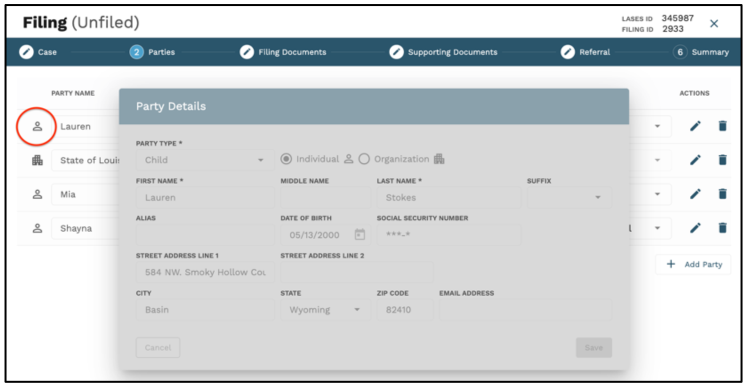
**g.** If the Party Type is not automatically pulled in from LASES, users will select need to select the party type from the drop-down for each party brought in from LASES.




**h.** Differentiate the Custodial and non-custodial parent by selecting from the drop down in the Custodial column. This is not a required field; however, it will be beneficial if your office is utilizing templates.

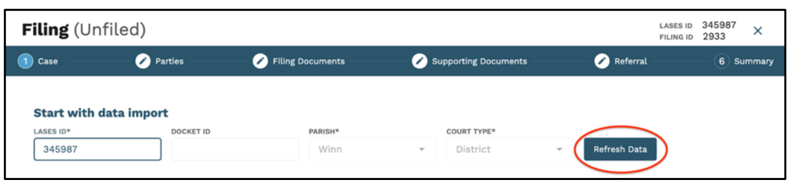



**i.** You can view party information by hovering over the person icon next to each party member's first name.




j. If party names or information is **__incorrect,__** you will need to be correct the information in LASES first. Once the information is correct in LASES, go back to the step #1, case in GovLink and click 'Refresh Data'. The updated information will populate automatically.

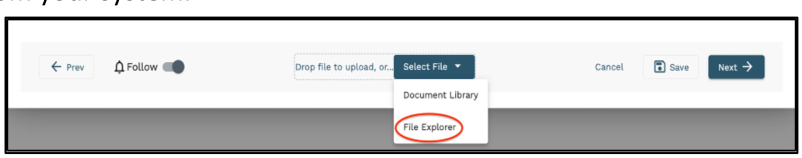
k. If party names or information is **__incorrect,__** you will need to be correct the information in LASES first. Once the information is correct in LASES, go back to the step #1, case in GovLink and click 'Refresh Data'. The updated information will populate automatically.




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

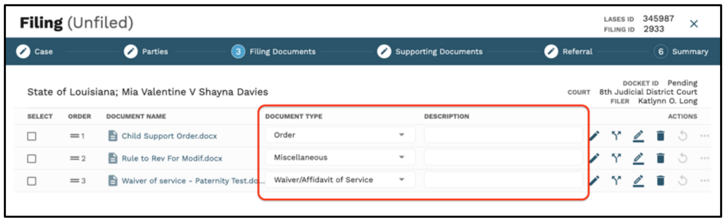
4. **Step 3: Filing Documents:** The Filing Documents are going to be the documents that will be filed with the court. In the Filing Documents tab of the wizard:

   a. Drag & Drop your document into the Drop Zone, or click 'File Explorer' to select your files from your system.

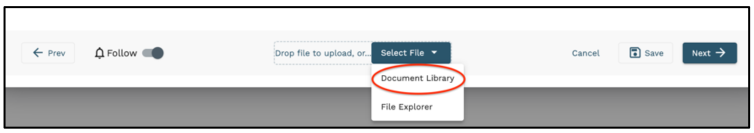



   b. Select the Document Type from the drop-down list. This is a required field.

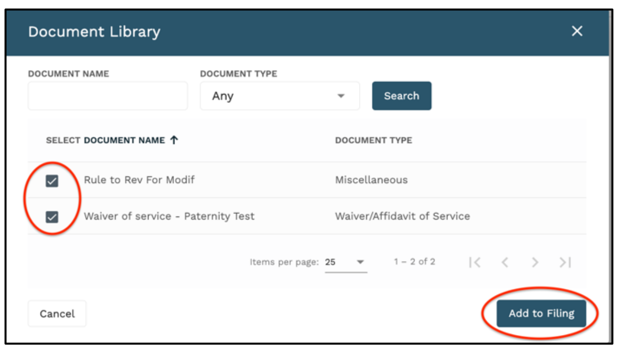
c. Optionally, add a description to the description box.




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. For templated documents, the party and case data from LASES will automatically populate into the template.

g. All documents added to the filing, including templates can 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. Rework – Click the ReWork icon to remove all signatures to a document and revert the document back to its original format.

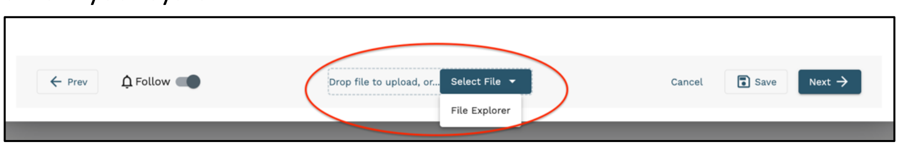
vi. Delete – Click the Delete icon to delete an unfiled document.

vii. Rotate – Click the Rotate icon to turn individual pdf documents any direction within GovLink.

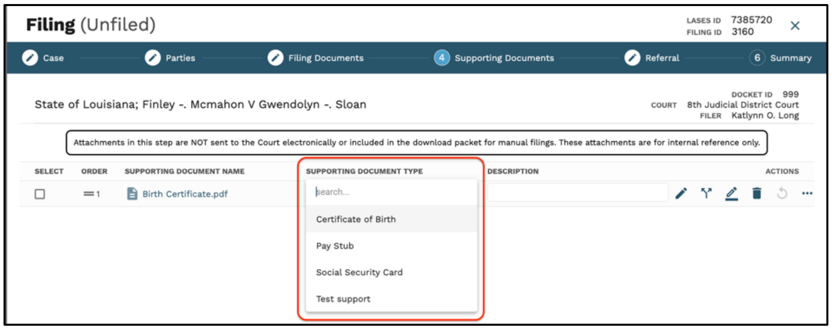
**h.** Click Save to save your progress and exit the wizard. You can come back later to continue your work. Or click next to continue to the Supporting Documents step.

5. **Step 4 - Supporting Documents**: Attachments or documents that need to be a part of the case but do not need to be filed to the court. In the Supporting Documents tab of the wizar


**a.** Drag & drop your document into the Drop Zone, or click ‘File Explorer’ to select your files from your system.

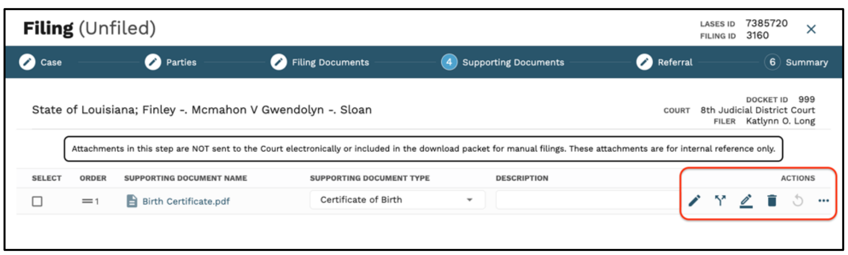



**b.** Select the Document Type from the drop-down list. This is a required field.




c. Optionally, add a description to the description box.

d. All of the filing document editing tools will be available in the supporting documents step as well.

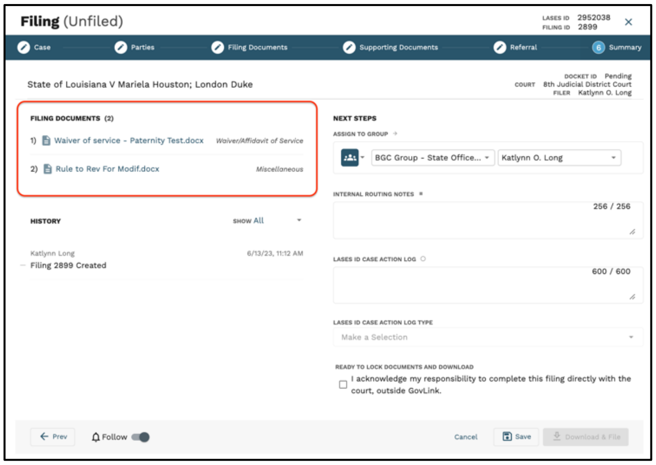



e. Click Save to save your progress and exit the wizard. You can come back later to continue your work. Or click next to continue to the next step.

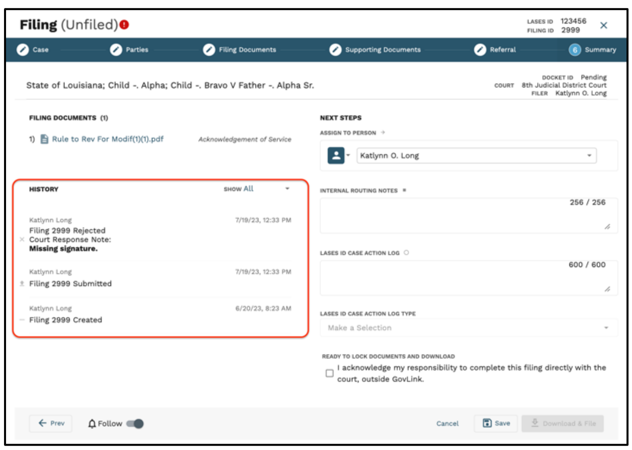
6. **Step 5 – Referral:** Since this workflow does **NOT** require a referral, click 'Next' to proceed to the summary step.

7. **Step 6 – Summary:**

   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.

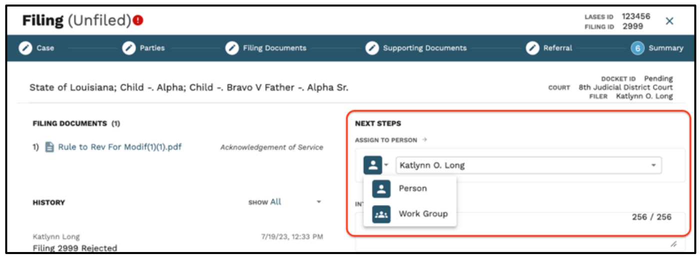


b. Filing History section will show who created the filing, any assignment changes, all internal routing notes, and any CALO updates that have been added to the filing. This is also one where you can find the rejection reason should a filing be rejected.

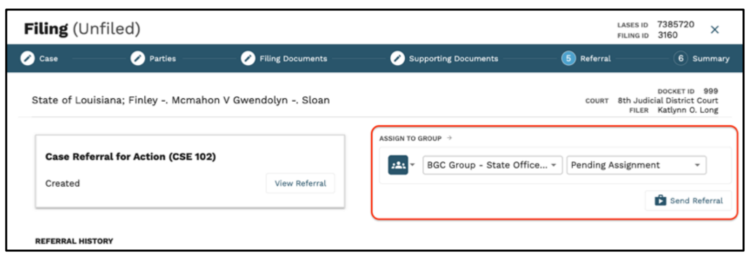


c. Depending on your office's workflow, users can assign this filing to either a work group or individual.

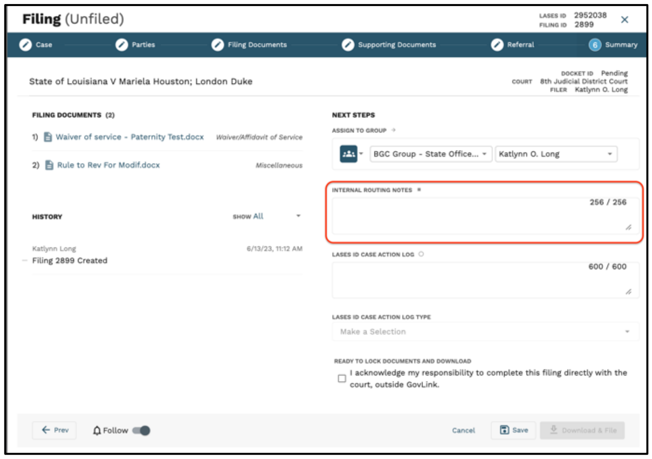
   i. **Assign to an individual** by selecting the single person icon from the drop down and then select the person's name you wish to assign the referral to.



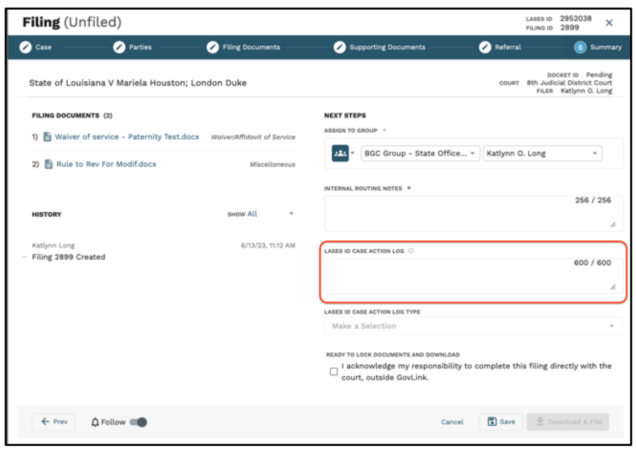

ii. **Assign to a Work Group** by selecting the Work Group icon from the drop down and then first select the work group you are assigning the referral to. If you know the individual within the work group that the referral is being assigned to you can select their name from the second drop down. If you do not know the individual within the work group.



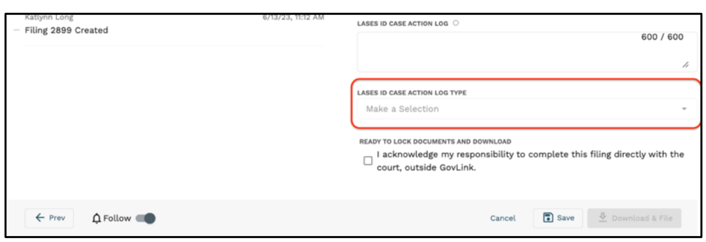

**d.** Add any internal notes pertaining to this filing in the Internal Routing Notes section. These notes will stay within GovLink and will only be able to view internally. Similar to a sticky note!



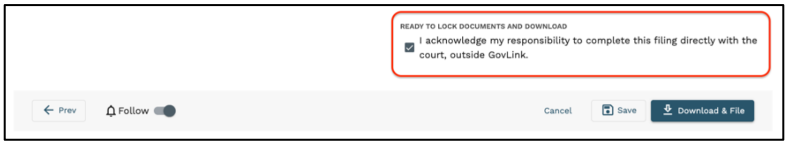

**e.** Add notes for the LASES Case Action Log (CAL).



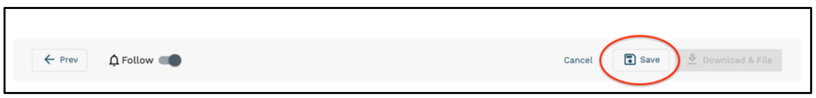

**f.** Add a CALO Type from the the drop down. The CALO Notes and the CALO type will both be fed back to LASES.



g. 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.

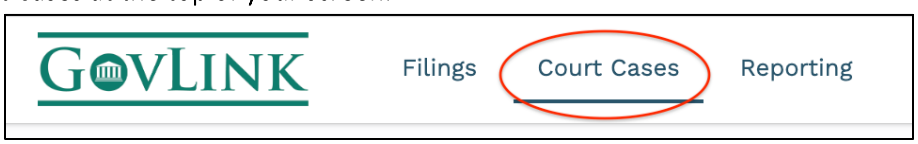



h. If the user does not have permission to file, they are able to assign to a different user and click 'Save' to assign this filing. You can also click the 'Save' button if you'd like to simply save your work and exit the Filing Wizard.




## FIND AN EXISITING CASE

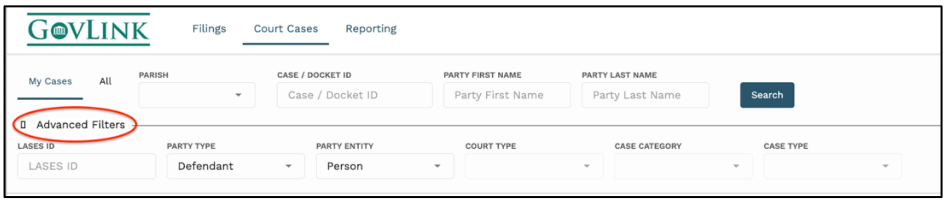
1. Click Court Cases at the top of your screen.




2. You must first select if you are search within the flowing:
   a. My Cases: just your specific cases
   b. All: will search all cases at that specific location, then:
      i. the Parish to be searched, AND then enter either:
      ii. the Case/Docket ID **OR**
      iii. 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 LASES 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.

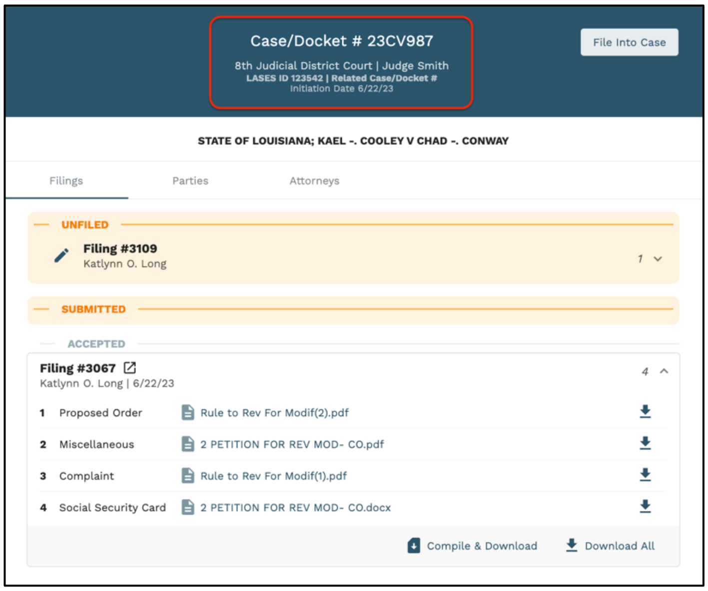



5. Click “Search”.
6. View the results of your search below the search box. Click any column heading to sort the results.

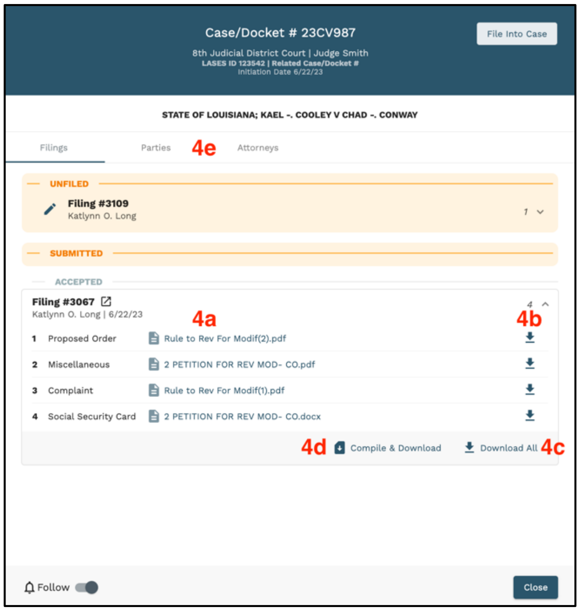
## VIEW THE DETAILS OF A CASE

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. Once you’ve located the intended case, click anywhere on the case to open the Case Information pop-up box.
2. Review case details, located at the top of the pop up.




3. Review filings by categories of Unfiled, Submitted, and Accepted.
4. Click:
    a. individual document title in each row to view a specific document.
    b. the download arrow next to a document to download that document only.
    c. the ‘Download All’ button to download all filings as individual documents on this case.
    d. The Compile & Download button to download all filings in one combined document on this case.
    e. the Parties or Attorneys tabs to view parties or attorneys associated with this case.

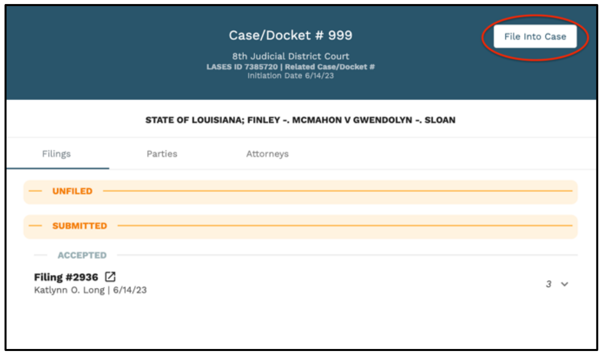



5. Click the Follow icon to turn notifications for this case on or off.

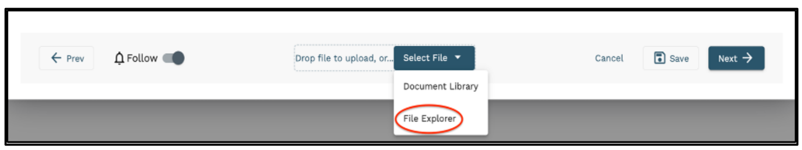

## FILE ONE OR MORE DOCUMENTS INTO AN EXISTING CASE

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:

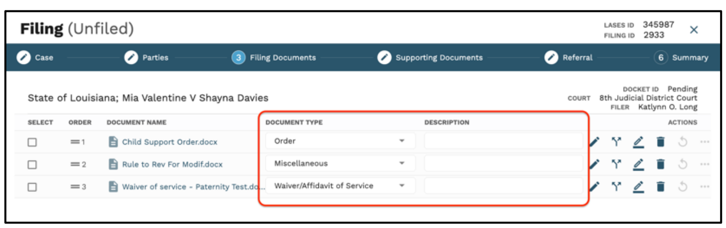
1. Click anywhere on the case to open the Case Information pop-up box.
2. Click the File Into Case button in the top right hand corner to launch the filing wizard.



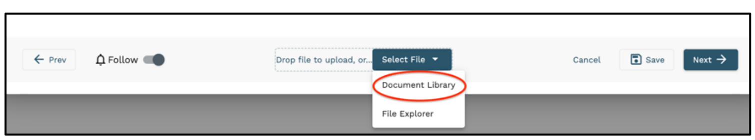

3. **Step 3: Filing Documents:** The Filing Documents are going to be the documents that will be filed with the court. In the Filing Documents tab of the wizard:
    a. Drag & Drop your document into the Drop Zone, or click ‘File Explorer’ to select your files from your system.



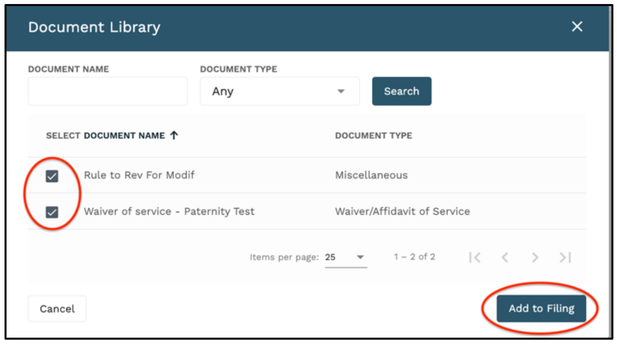

    b. Select the Document Type from the drop-down list. This is a required field.
    c. Optionally, add a description to the description box.




    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’



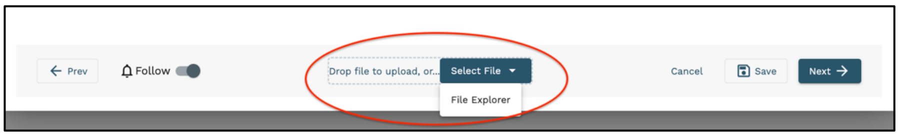

f. For templated documents, the party and case data from LASES will automatically populate into the template.

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

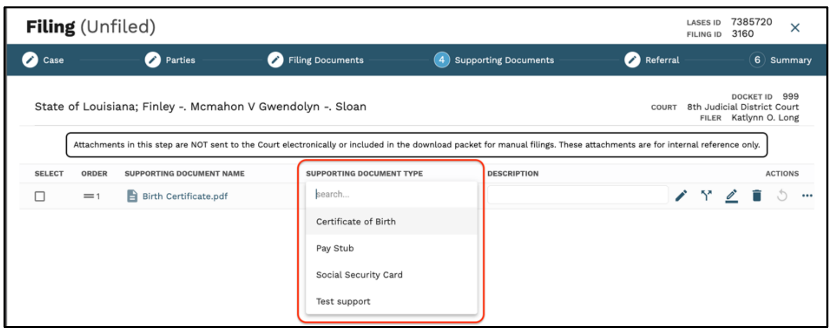
   i. Edit – Click the Edit icon to make edits on the document.
   ii. Split – Click the Split icon to split a multi-page document into separate documents.
   iii. Combine- Select the documents and click the combine icon to merge documents.
   iv. Sign – Click the Sign icon to insert electronic signatures/initials into the document.
   v. Rework – Click the ReWork icon to remove all signatures to a document and revert the document back to its original format.
   vi. Delete – Click the Delete icon to delete an unfiled document.
   vii. Rotate – Click the Rotate icon to turn individual pdf documents any direction within GovLink.

h. Click Save to save your progress and exit the wizard. You can come back later to continue your work. Or click next to continue to the Supporting Documents step.

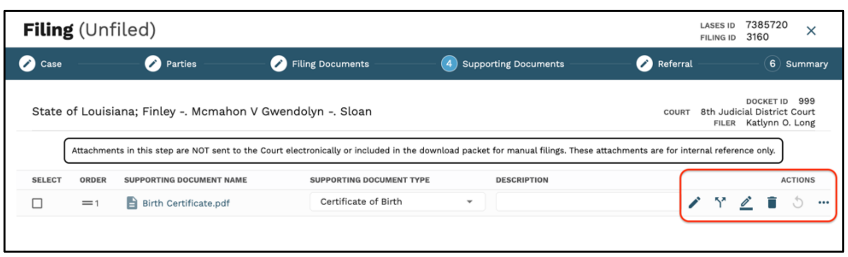
4. **Step 4 - Supporting Documents**: Attachments or documents that need to be a part of the case but do not need to be filed to the court. In the Supporting Documents tab of the wizard:
    a. Drag & drop your document into the Drop Zone, or click ‘File Explorer’ to select your files from your system.




    b. Select the Document Type from the drop-down list. This is a required field.

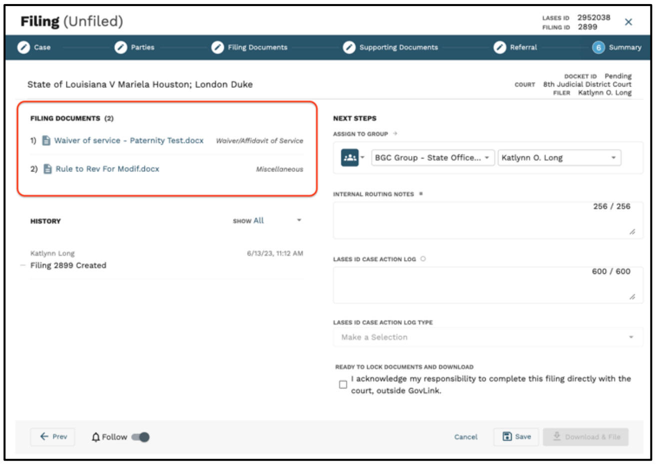



    c. Optionally, add a description to the description box.
    d. All of the filing document editing tools will be available in the supporting documents step as well.

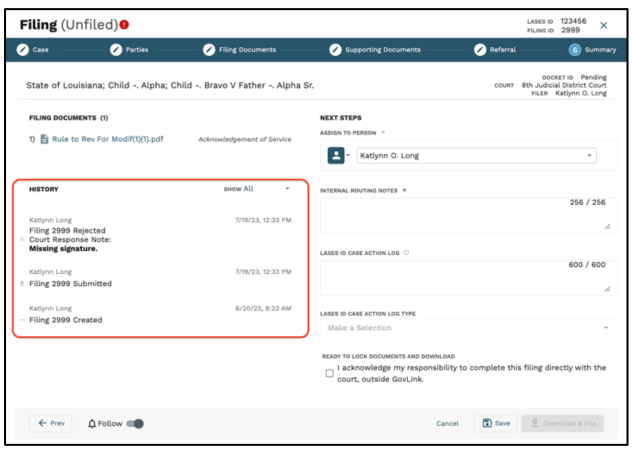



    e. Click Save to save your progress and exit the wizard. You can come back later to continue your work. Or click next to continue to the next step.

5. **Step 6 – Summary:**
    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.

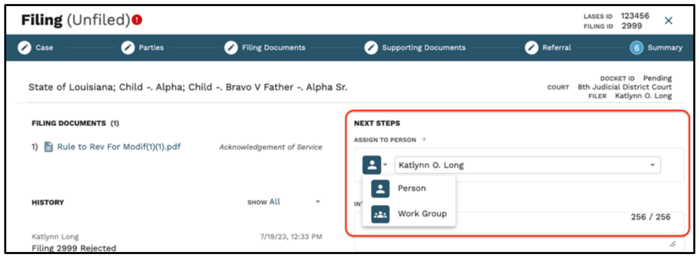



b. Filing History section will show who created the filing, any assignment changes, all internal routing notes, and any CALO updates that have been added to the filing. This is also one where you can find the rejection reason should a filing be rejected.

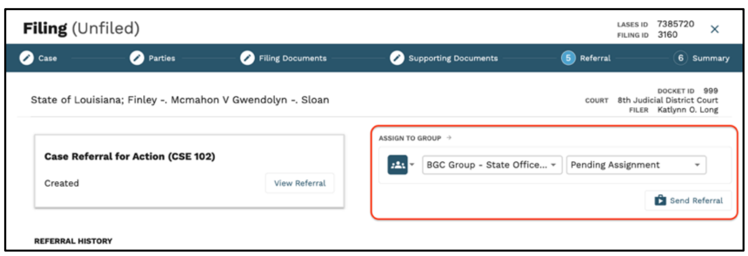



c. Depending on your office's workflow, users can assign this filing to either a work group or individual.

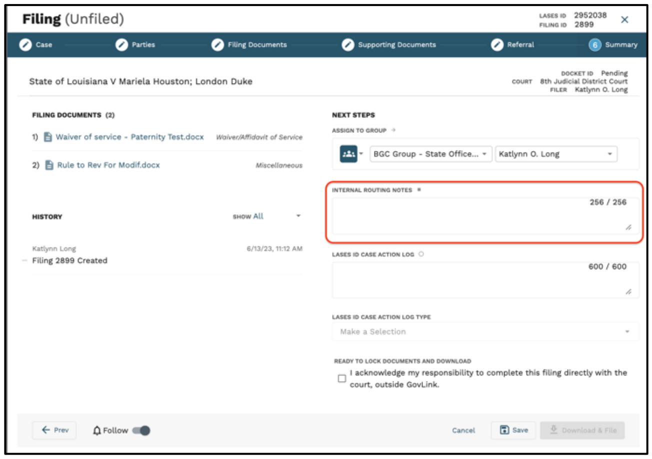
i. **Assign to an individual** by selecting the single person icon from the drop down and then select the person's name you wish to assign the referral to.



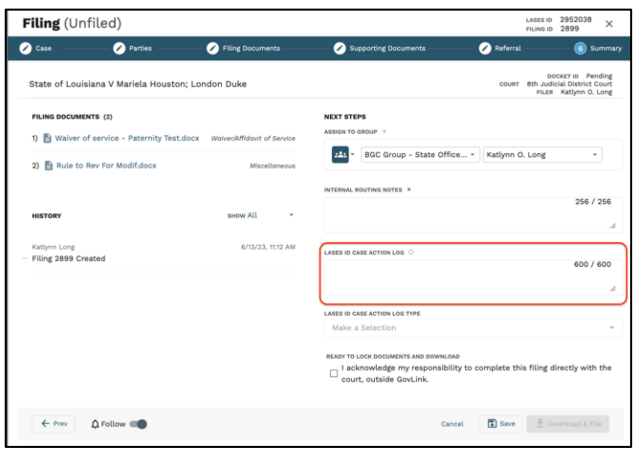

ii. **Assign to a Work Group** by selecting the Work Group icon from the drop down and then first select the work group you are assigning the referral to. If you know the individual within the work group that the referral is being assigned to you can select their name from the second drop down. If you do not know the individual within the work group.



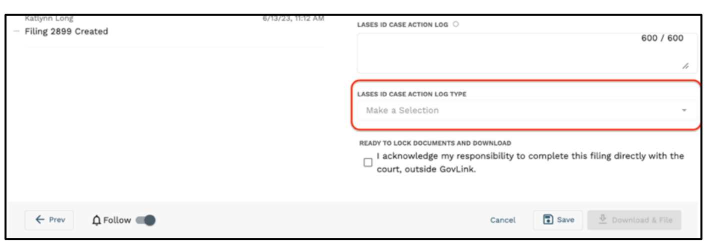

d. Add any internal notes pertaining to this filing in the Internal Routing Notes section. These notes will stay within GovLink and will only be able to view internally. Similar to a sticky note!



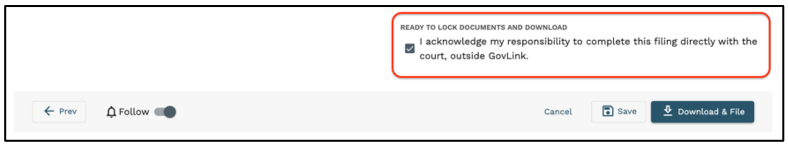

e. Add notes for the LASES Case Action Log (CAL).



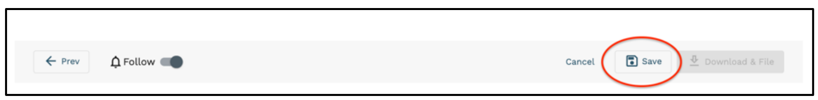

f. Add a CALO Type from the the drop down. The CALO Notes and the CALO type will both be fed back to LASES.



g. 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.




h. 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.



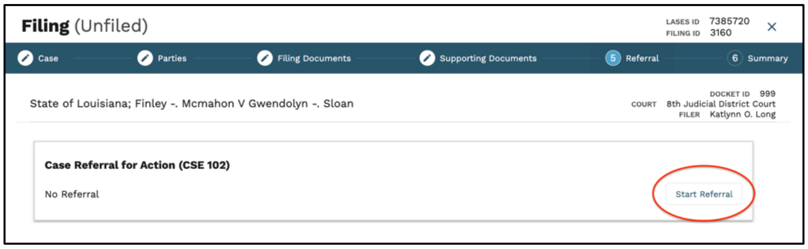

## SENDING A REFERRAL FOR AN EXISITING CASE

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:

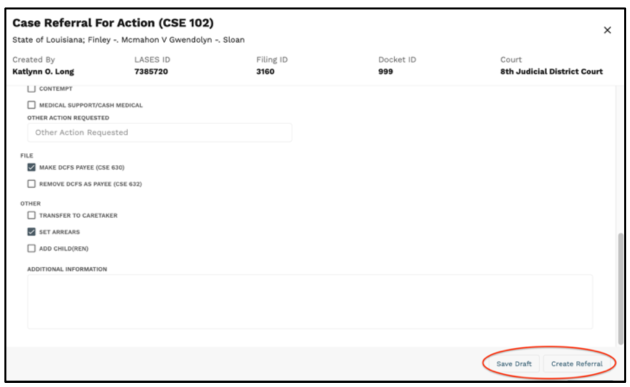
1. Click anywhere on the case to open the Case Information pop-up box.
2. Click the File Into Case button in the top right hand corner to launch the filing wizard.
3. You will be taken to the Filing Documents step of the filing stepper.

   a. Click the referral step of the top of filing stepper or click the ‘Next’ button until you’re on step 5 of the filing stepper.

   b. Click the Start Referral button.

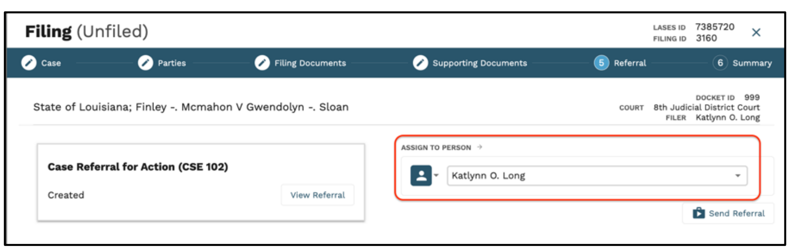



c. Complete the CSE 102 Referral form with the necessary information. Once complete, click the 'Create Referral' button at the bottom of the form. If the CSE 102 form is not complete and the user needs to come back to it, they can simply select 'Save.'

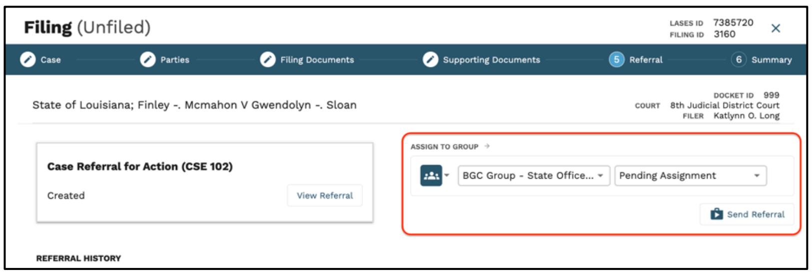



d. Assign the Referral under the Assign To section on the Referral Step of the filing stepper.

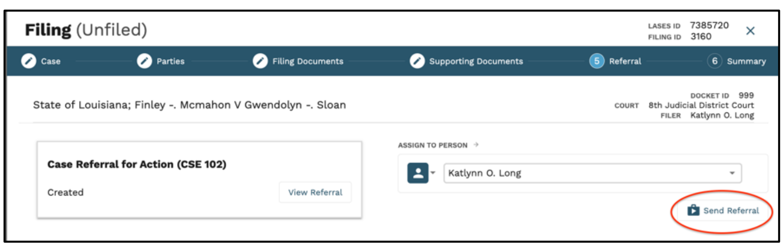
i. **Assign to an individual** by selecting the single person icon from the drop down and then select the person's name you wish to assign the referral to.



ii. **Assign to a work group** by selecting the Work Group icon from the drop down and then first select the work group you are assigning the referral to. If you know the individual within the work group that the referral is being assigned to you can select their name from the second drop down. If you do not know the individual within the work group that the referral is being assigned to, select 'Pending Assignment' from the second drop down.




e. Click the 'Send Referral' button.



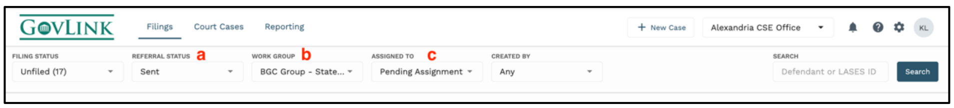

f. If no further action is needed, exit out of the filing by clicking the 'X' in the upper right-hand corner of the filing stepper.

## ACCEPTING A REFERRAL

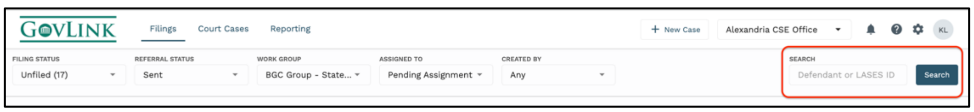
Accepting a referral is a user-based permission. Only users who have the Accept Referral permission turned on will be able to perform this action.

If a user has their referral notifications turned on, they will be notified when a referral has been sent to them.

1. Users can locate referrals that have been sent to them or to a work group that they are associated with on their dashboard by remaining in the Unfiled filing status and filtering their dashboard to one or more of the following criteria:
    a. To Referral Status to "Sent"
    b. By the Work Group that the referral was sent to
    c. To an individual user that the referral was sent to or select 'pending assignment' if to filings that does not have a user assigned yet.

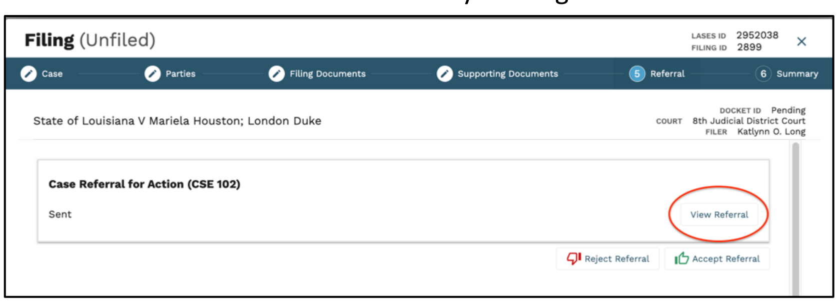



2. You can also search for a filing by Defendant or LASES ID.

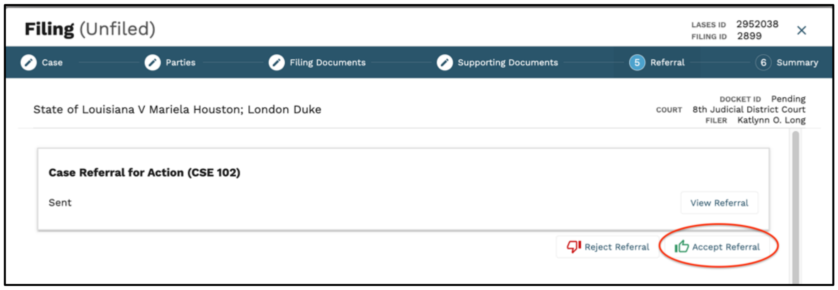



3. Click anywhere on the case to open the filing stepper.
4. Go to the Step 5, the referral step, by clicking the next button at the bottom of the filing stepper.

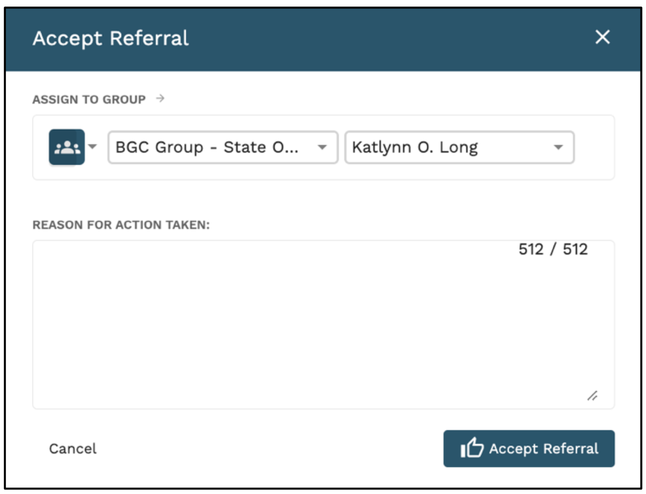

5. View the information within the CSE-102 form by clicking "View Referral."



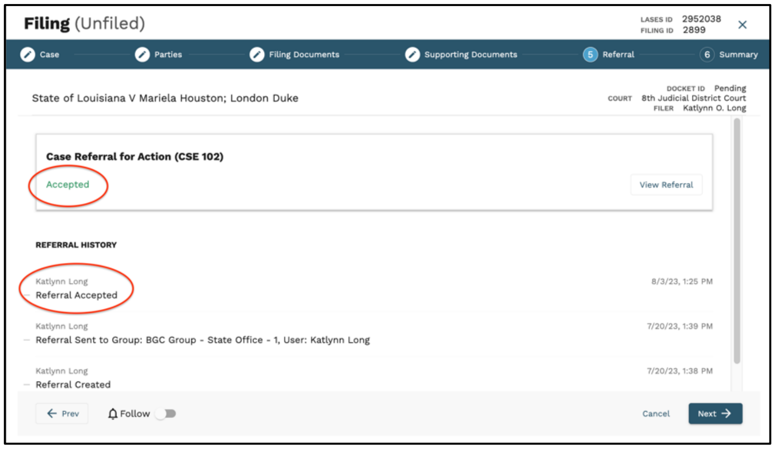

6. Click the accept referral button.




7. Within the in the pop up, you can either keep it assigned to yourself OR assign the accepted referral to a different user. Optionally, users can also add a note in the reason for action taken section.




8. Once user clicks the “Accept Referral” button, the status of the referral will be reflected in the referral history section.



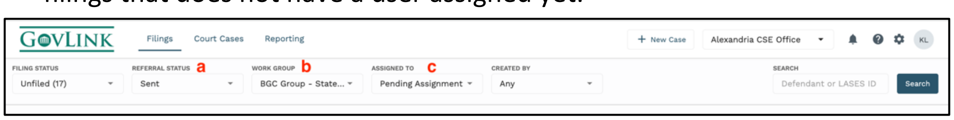

9. If no further action is needed, exit out of the filing by clicking the 'X' in the upper right-hand corner of the filing stepper.

## REJECTING A REFERRAL

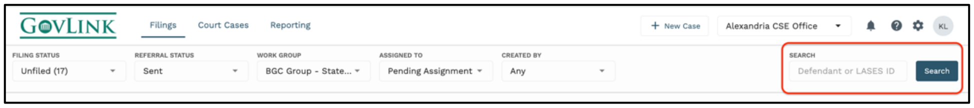
Accepting a referral is a user-based permission. Only users who have the Accept referral permission turned on will be able to complete this action.

If a user has their referral notifications turned on, they will be notified when a referral has been sent to them.

1. Users can locate referrals that have been sent to them or to a work group that they are associated with on their dashboard by remaining in the Unfiled filing status and filtering their dashboard to any of the following criteria:
   a. To Referral Status to "Sent"
   b. By the Work Group that the referral was sent to
   c. To an individual user that the referral was sent to or select 'pending assignment' if to filings that does not have a user assigned yet.

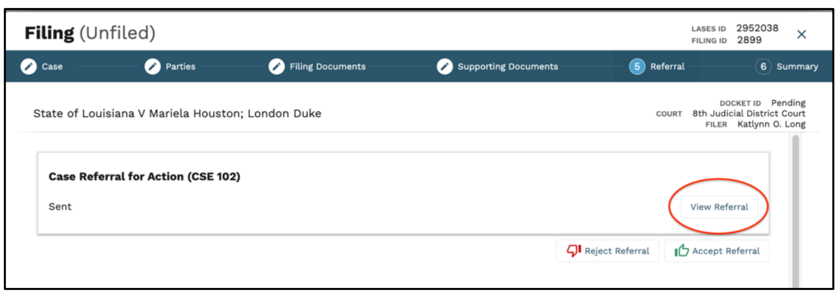


2. You can also search for a filing by Defendant or LASES ID.

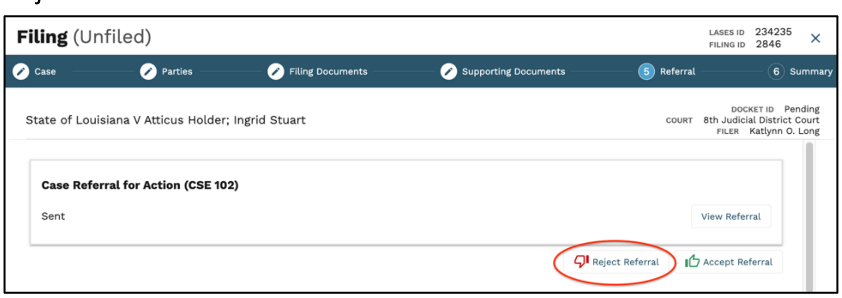



3. Click anywhere on the case to open the filing stepper.
4. Go to the Step 5, the referral step, by clicking the next button at the bottom of the filing stepper.

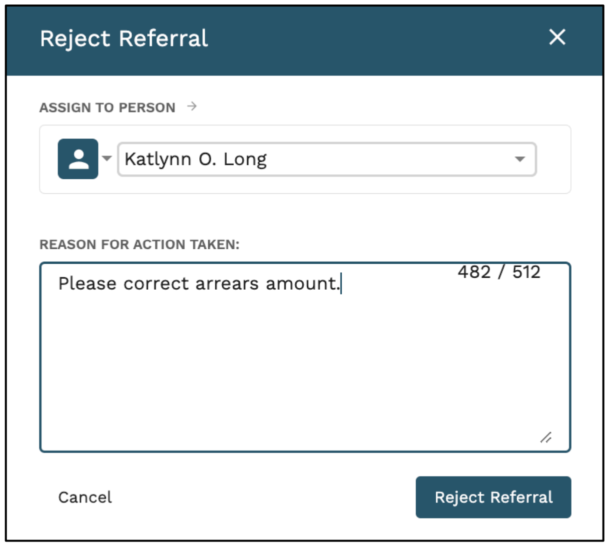

5. View the information within the CSE-102 form by clicking "View Referral"



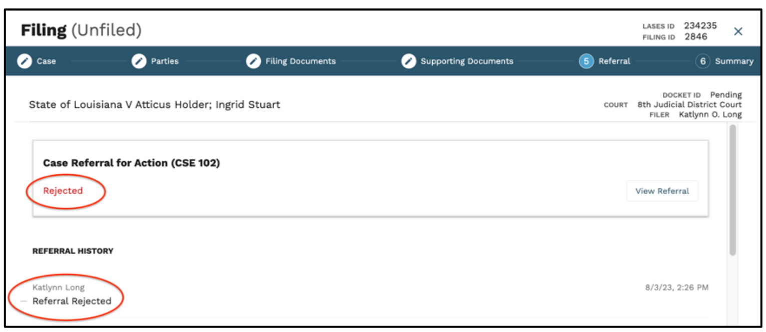

6. Click the 'Reject Referral' button.




7. Within the in the pop up, assign the referral back to the necessary user and/or work group. Add the reason for rejection within the free text box. This is a required field to be able to click the "Reject Referral" button.




8. Once user clicks the "Reject Referral" button, the referral will be sent back to the user it was assigned to and the status of the referral will be reflected in the referral history section.

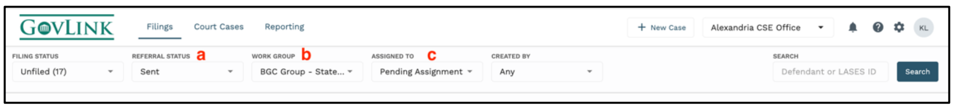



9. If no further action is needed, exit out of the filing by clicking the 'X' in the upper right-hand corner of the filing stepper.

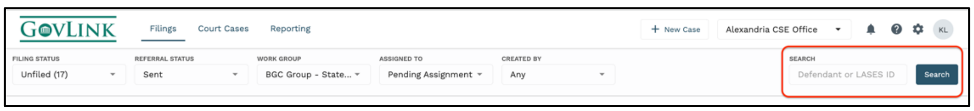
## REWORKING A REJECTED REFERRAL

If a user has their Rejected Referral notifications turned on, they will be notified when a referral that they have created has been rejected and also when it has been assign back to them.

1. Users can locate referrals that have been rejected and sent to them or to a work group that they are associated with on their dashboard by remaining in the Unfiled filing status and filtering their dashboard to any of the following criteria:
   a. To Referral Status to "Rejected"
   b. By the Work Group that the referral was sent to
   c. To an individual user that the referral was sent to or select 'pending assignment' if to filings that does not have a user assigned yet.




2. You can also search for a filing by Defendant or LASES ID.



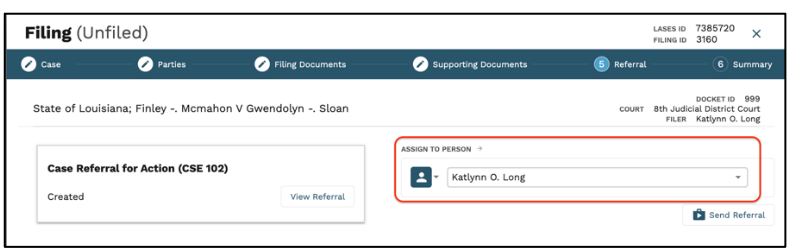

3. Click anywhere on the case to open the filing stepper.
4. Go to the Step 5, the referral step, by clicking the next button at the bottom of the filing stepper.


5. Click "View Referral"
6. Locate the Rejection reason at the bottom of the CSE-102 form under the "Referral Rejected" section.

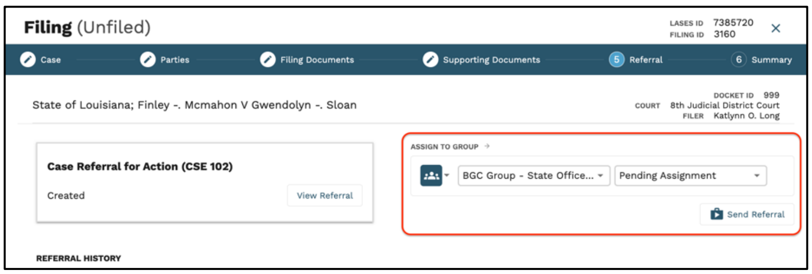

7. Click the “Rework Referral” button.


8. Once the changes/corrections to the CSE 102 form have been made, click “Create Referral.”
9. Resend the corrected referral under the Assign To section on the Referral Step of the filing stepper.

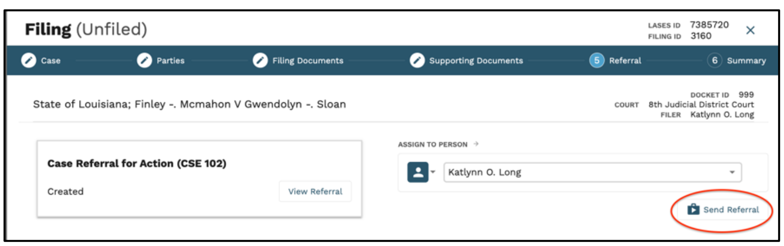
   a. **Assign to an individual** by selecting the single person icon from the drop down and then select the person’s name you wish to assign the referral to.



b. **Assign to a work group** by selecting the Work Group icon from the drop down and then first select the work group you are assigning the referral to. If you know the individual within the work group that the referral is being assigned to you can select their name from the second drop down. If you do not know the individual within the work group that the referral is being assigned to, select 'Pending Assignment' from the second drop down.




10. Click the 'Send Referral' button.



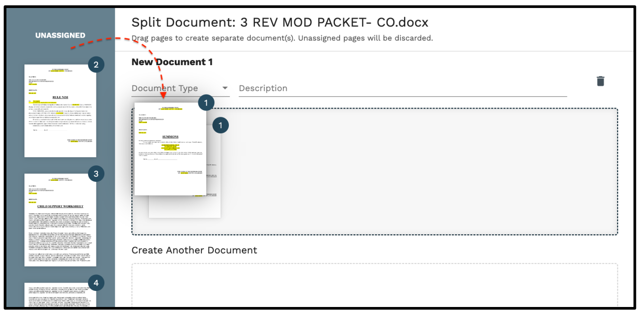

11. If no further action is needed, exit out of the filing by clicking the 'X' in the upper right-hand corner of the filing stepper.

## WORK TOOLS FOR FILING DOCUMENTS AND SUPPORTING DOCUMENTS

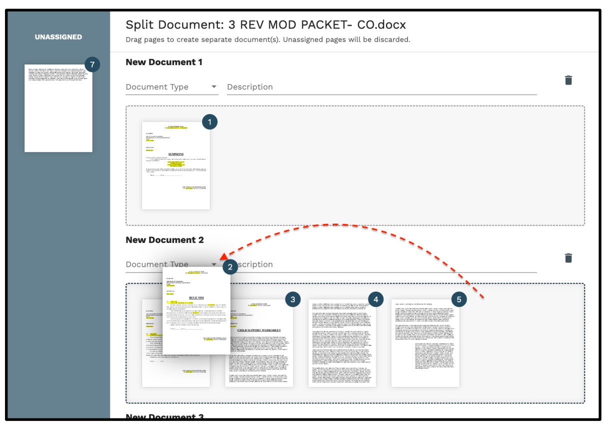
1. **Edit** – Click the Edit icon to make edits on the document

   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.

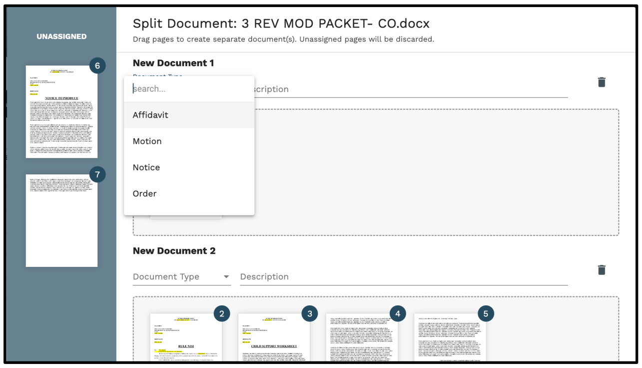
2. **Split** – Click the Split icon to split a multi-page document into separate documents. 
    a. Select the desired document on the right in the “Unassigned” column.
    b. The user will drag the document(s) into the appropriate trays, outlined in a dotted grey box on the right.




    c. If multiple pages are found within a tray, the user can rearrange the pages.

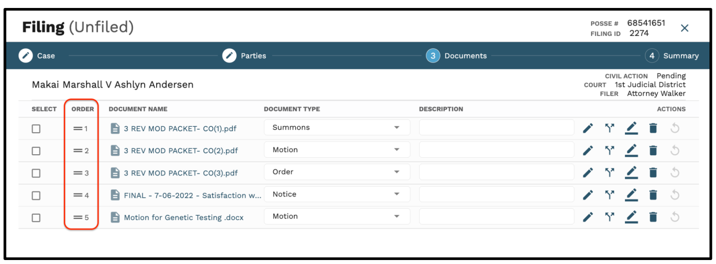



    d. Users are encouraged to name the Document Type before saving. Users may also add a document description.



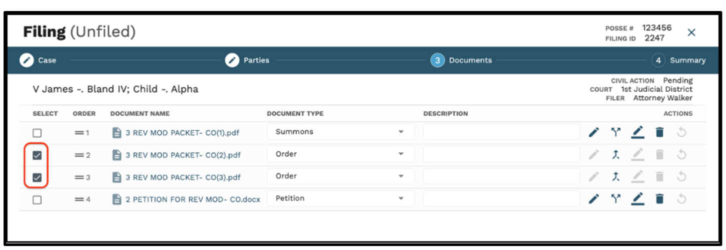

e. Any documentation left in the “Unassigned” column will be discarded and not compiled to be filed to the court.

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

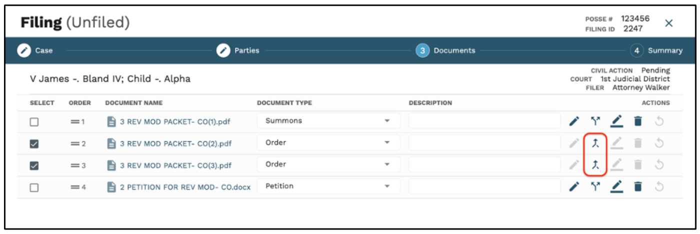



3. **Combine**- Combine multiple documents into one document.

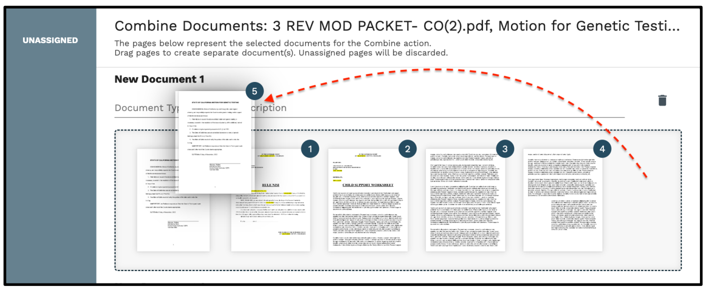
c. To combine multiple documents, select the desired documents on the left side of the screen.



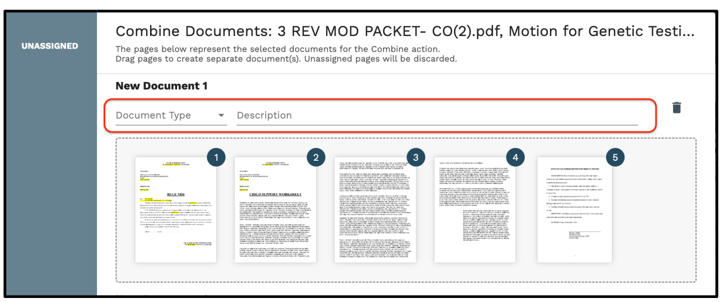

b. The split document button will change to combine documents for the documents selected.




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

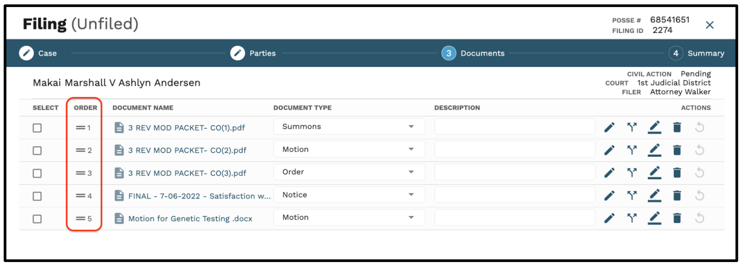



d. Users are encouraged to name the Document Type before saving. Users may also add a document description.



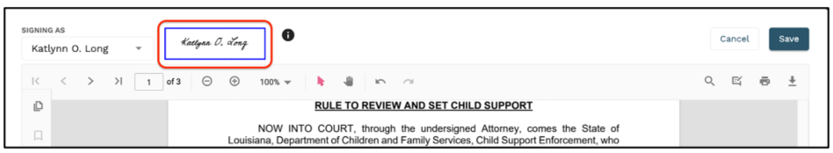

e. Any documentation left in the "Unassigned" column will be discarded and not compiled to be filed to the court.

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

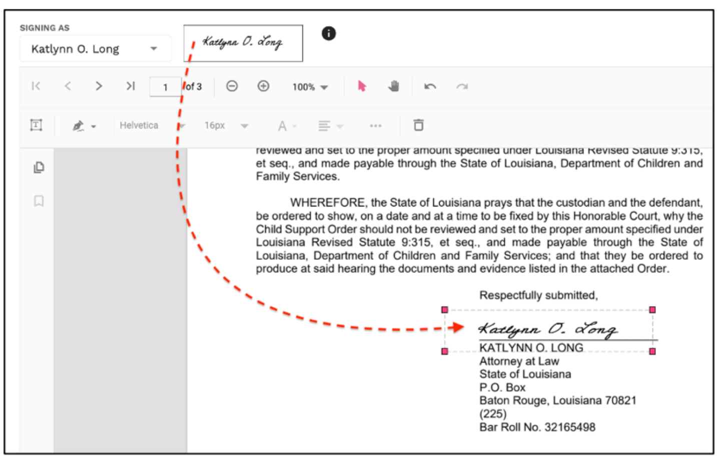



4. **Sign** – Click the Sign icon to insert electronic signatures/initials into the document.

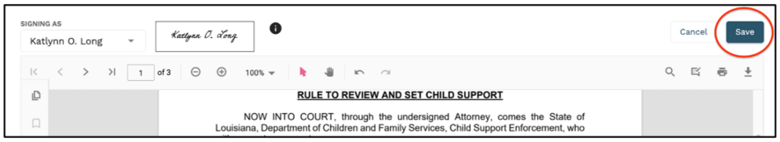
a. If given permission to sign, user will select the signature at the top of the document and wait until the signature box turns blue.



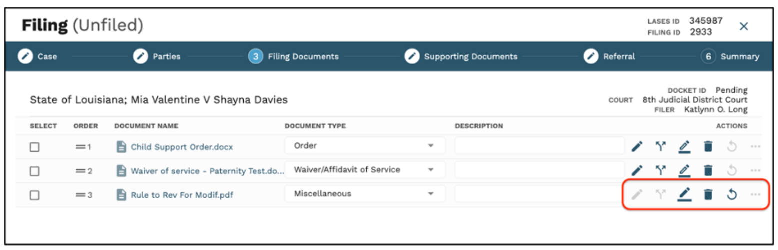

b. Once blue, the user will select the area they would like to drop and insert the signature.




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

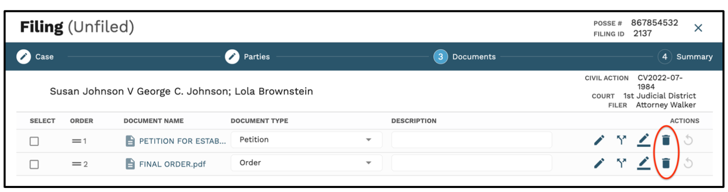



d. Once a signature has been applied, the editing tools will be "locked down" and will be greyed out and users will no longer be able to make additional edits.




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.

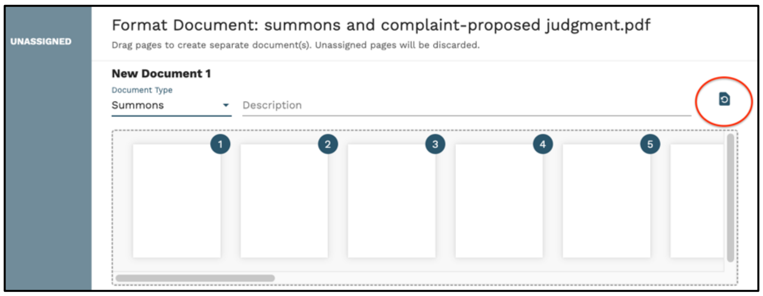
6. **Rework** – To rework or correct a document, select the rework icon within the work tools to .

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

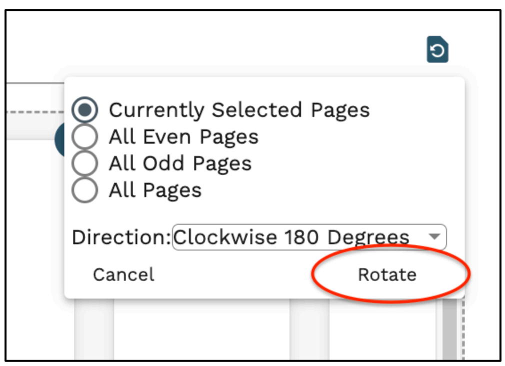
   b. By clicking the Rework icon, any signatures that have been applied to that document will be removed and return the document back to its original form.

   c. The edit, split, and merge tool will now be available to use for this document.

7. **Rotate –** To rotate any documents, click the 3 dots to the far-right hand side of the editing tools and select the Rotate icon from the drop down.
   a. Within the pop up, click the rework icon next to the document description line.



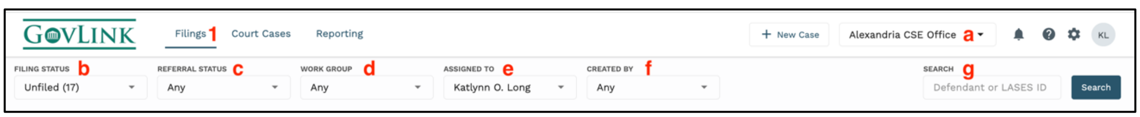

   b. From the drop down select:
      i. The documents needing to be rotated. Users can also select individual pages they would like rotated before clicking the rotate icon.
      ii. The direction the documents need to be rotated from the drop down.
      iii. Click "Rotate"



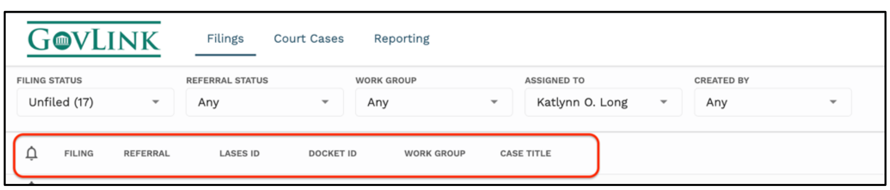

   c. Click the Save.
   d. Note: this editing tool only works on PDFs.

## 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. Select the desired filing status of Unfiled, Submitted, Accepted, Rejected, or All.
    c. If there is a referral is associate with this filing, users can select the status of the referral from the Referral status drop-down list.
    d. View filings assigned to a particular work group from the work group drop down.
    e. Select the person's name the filing has been assigned to.
    f. Select the person that created the filing from the Created By drop-down list.
    g. Enter a Party Name, the LASES Number, or Case Number in the Search box.



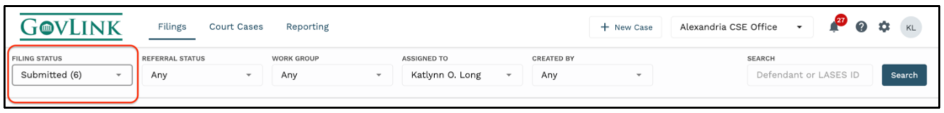

2. Click the 'Search' button.
3. All filings matching any of the criteria you selected or entered are displayed in the main part of the page and results may be sorted by clicking the status header.



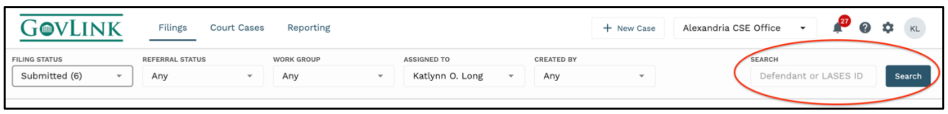

## MANUALLY ACCEPT A FILING

Manually accepting filings is a user-based permission. Only users who have been given this permission will be able to manually accept filings.

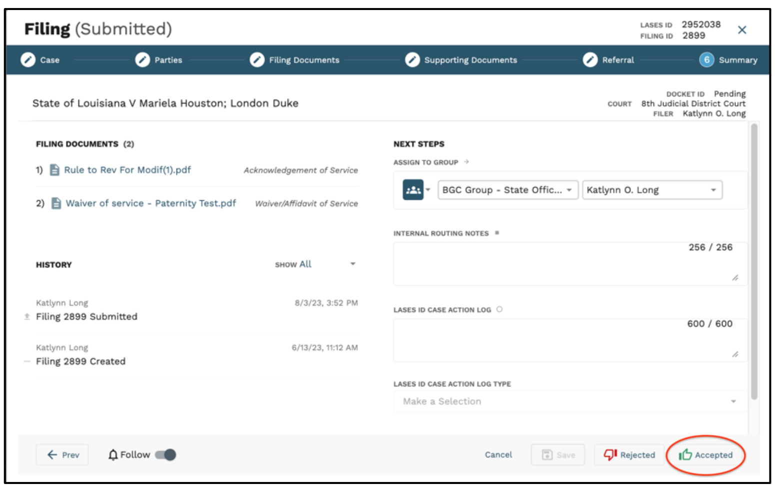
1. Once an Accepted filing has returned from the court, users will need to locate and manually accept that filing within GovLink.
2. Filter your dashboard to the "submitted" filing status.



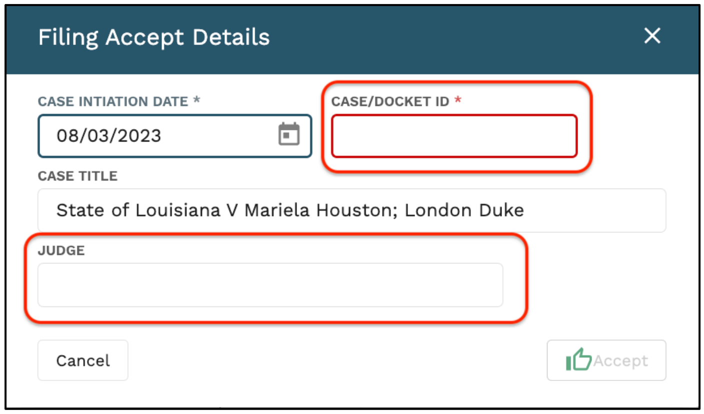

3. If needed, use the search box to locate the filing by the Defendant or by LASES #.




4. Click anywhere on that filing to open the filing stepper.
5. On Step 6 – Summary, click the "Accept" button.




6. Within the popup, users will need to enter in the Docket ID and the Judge's name.

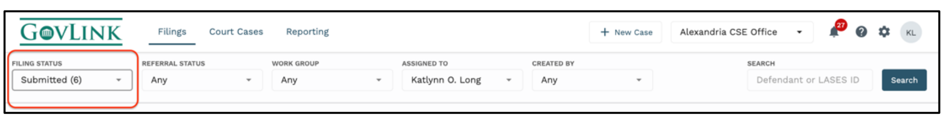



7. Click “Accept.”

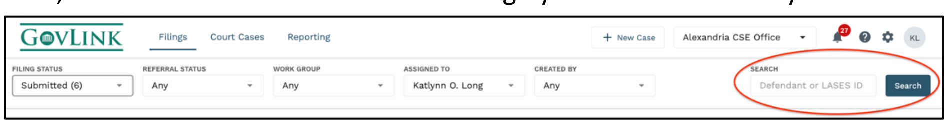
## MANUALLY REJECT A FILING

Manually rejecting a filing is a user-based permission. Only users who have been given this permission will be able to manually accept filings.

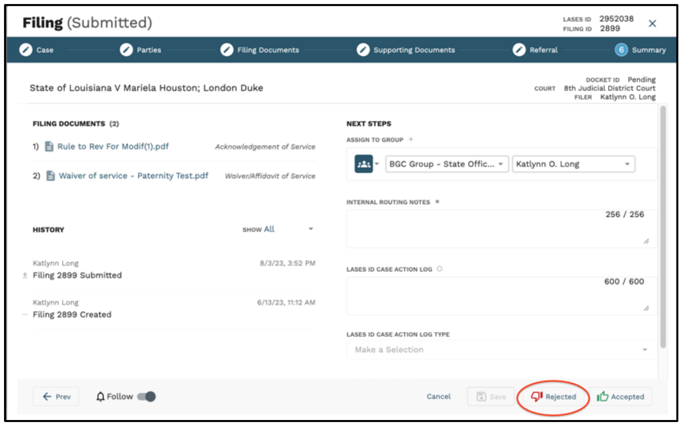
1. Once you’ve received a rejected filing from the court, users will need to locate and manually accept that filing within GovLink.
2. Filter your dashboard to the “submitted” filing status.




3. If needed, use the search box to locate the filing by the Defendant or by LASES #.

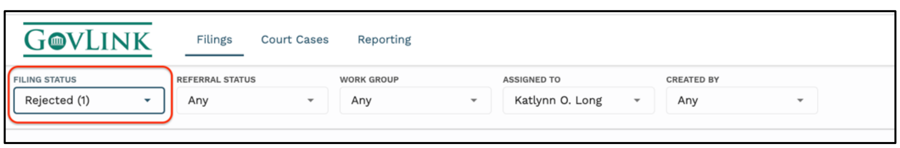



4. Click anywhere on that filing to open the filing stepper.
5. On Step 6 – Summary, click the “Reject” button.




6. Within the popup, users can select the rejection date and will need to enter in the rejection reason within the free text box.

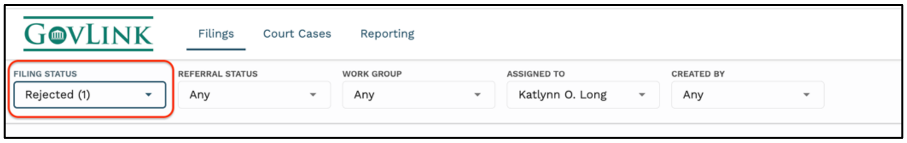

7. Click the "Reject" button.
8. Users will now be able to locate this filing under the Rejected filing status on their dashboard.




## PROCESSING REJECTED FILINGS

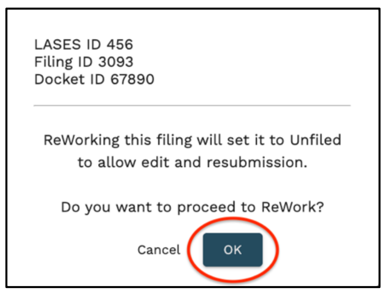
GovLink provides the tools to delete or rework filings that have been rejected by the Clerk's office.

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

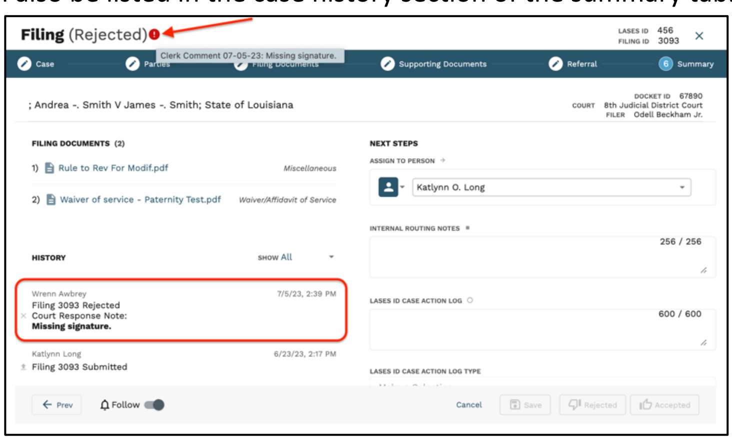



2. To rework the filing, the user will need to click the ReWork icon to the far right of the dashboard for that case.


3. Click 'OK' in the pop up to confirm you would like to proceed with the Rework.




4. After clicking OK, the Filing Stepper will be loaded to step #6, summary. Here, users can view the rejection reason 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.



5. 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.
6. If the rejection reason has to do with incorrect Case information or Party information, users will need to make those necessary changes in LASES first. When finished, click 'Refresh Data' on step #1, case to import the corrected information.


7. Once you have made the necessary changes to the filing, proceed to the next step in your workflow for this Filing just like you would if it were the first time you were working on it. I.E., assign to the next person who should work on or review it, make your Internal and/or LASES CAL Update Log notes, or download to file.

## 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.

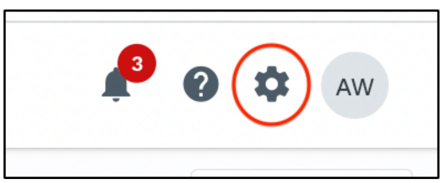
## USER MANAGEMENT

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

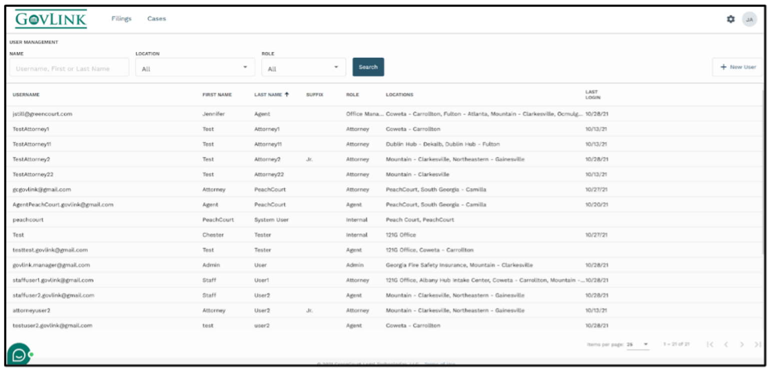
- Profile (username, name, role, bar number, address and phone number)
- Role (e.g.,attorney, case worker, legal assistant)
- Local Office(s)
- Notifications (filing status change, court updates, filing assignment change)
- Permissions (delete filinigs, sign, add users and edit users)
- Signature (upload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



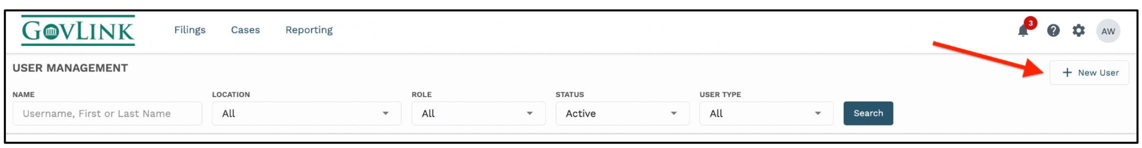

- Click the gear, then click "User Management."
- The User Management page displays a list of all users who are associated with the given location. Find a specific user or group of users by searching with any combination of NAME, LOCATION and ROLE.



## CREATE A NEW USER

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

- To add a new user, click “New User”



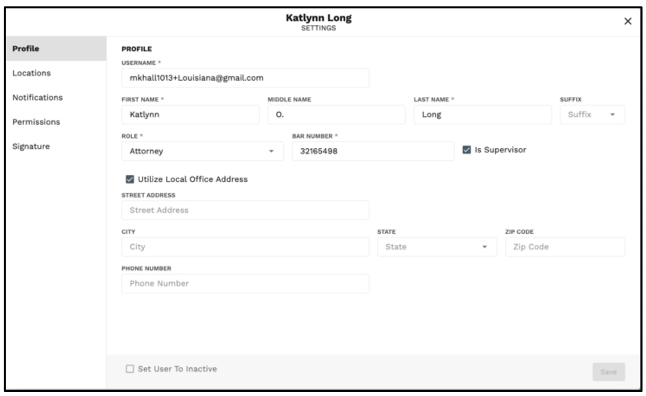

- Complete the required information on the Profile tab.
- The email address must be unique in order to create the new user.
- Click “Save” to create the new user and trigger an email notification to the new user.
- Proceed to the Locations, Notifications and Permissions tabs. Don’t forget to SAVE when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

**Best practices here to always search for user first!

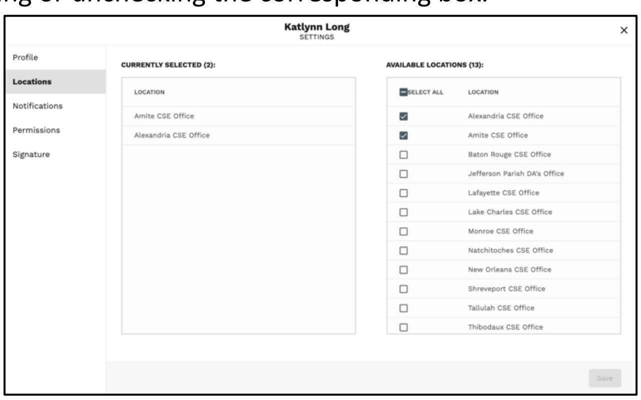
## USER SETTINGS

User profiles and permissions are set up by the state. Any permission or location adjustments need to go through a supervisor or the state systems team.

1. **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).
    - **A.** 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.
    - **B.** If a user is a supervisor for that specific role, click the 'Supervisor' check box next to the role drop down.



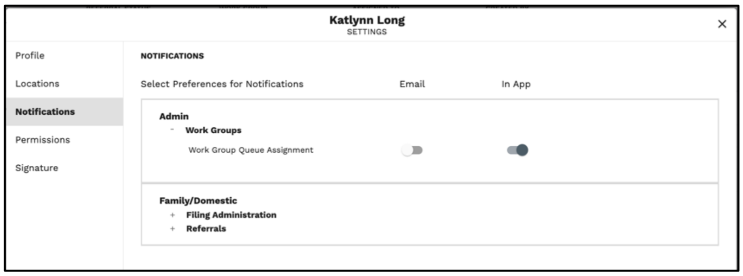

2. **The Locations tab** captures the locations that are associated with the user. Add or remove a location by checking or unchecking the corresponding box.




3. **The Notifications tab** controls the flow of email alerts for events tracked within the system.
    - **Email:** Notifications are sent directly to the users state email address.

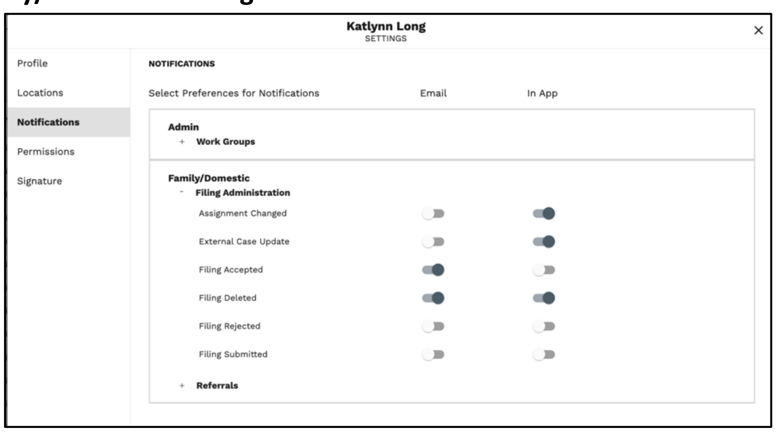
- **In App:** Notifications that can be viewed on a user's dashboard when they are logged in to GovLink.

- **Admin - Work Groups:**




A. **Work Group Que Assignment:** Will notify a user when a filing has been assigned to a work group that you are a member of.

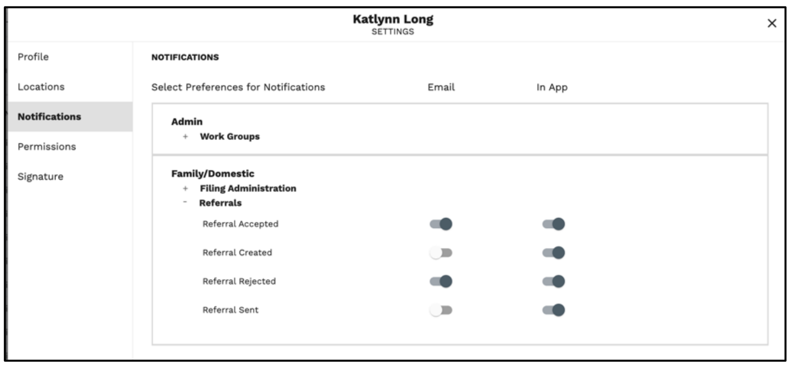
- **Family/Domestic – Filing Administration**




A. **Assignment Change:** Once a filing has been assigned to a different user, this notification will be sent to the user who created the filing, the assigned user, and anyone following that particular case.
B. **External Case Update:** Occurs when someone who is external to a CSE office files into the case. *This notification will be more applicable when eFiling.
C. **Filing Accepted:** Will notify users who have created a filing and/or following a case when a filing has been manually accepted.

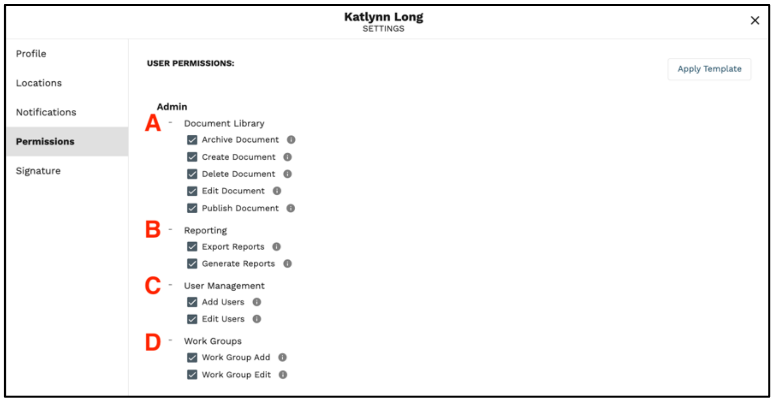
D. **Filing Deleted:** Will notify users who are following a case when a filing has been deleted.
E. **Filing Rejected:** Will notify users who are following a case when a filing has been manually rejected.
F. **Filing Submitted:** Will notify users who are following a case when a filing has been downloaded & filed within Govlink.

- **Family/Domestic – Referrals**



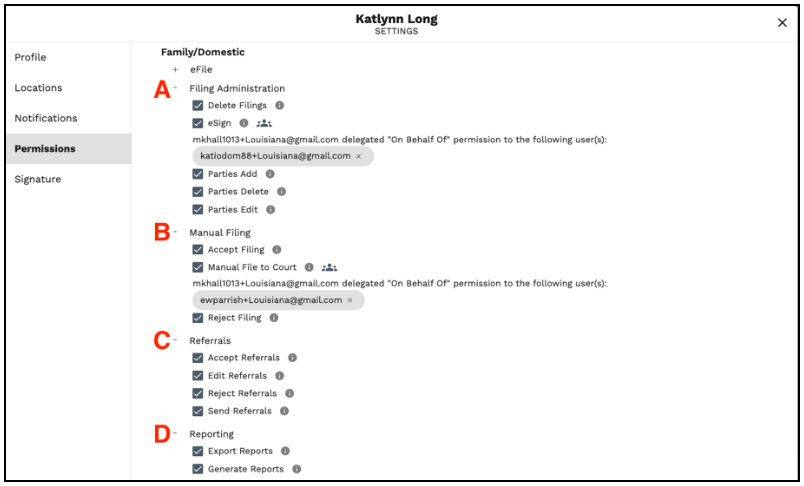

A. **Referral Accepted:** Will notify users who have created a filing/referral and users who are following a case when a referral has been accepted.
B. **Referral Created:** Will notify users who have created a filing and users who are following a case when a referral has been created.
C. **Referral Rejected:** Will notify users who have created a filing/referral and users who are following a case when a referral has been rejected.
D. **Referral Sent:** Will notify users who have created a filing and users who are following a case when a referral has been sent.

4. **The Permissions tab - ADMIN:** captures the decisions regarding the user's ability to perform certain actions within GovLink:




A. **Document Library:** Allows a user to create, edit, delete templates within the document library. The GreenCourt team will create all templates provided to them within GovLink and initially make any edits needed.
B. **Reporting:** User will not see the reporting option at the top of their dashboard if they don't have reporting permissions.
   i. **Generate Reports:** Gives users the ability to create Audit Log Report and/or User Permission Report.
   ii. **Export Reports:** Gives users the ability to export the generated admin reports into an excel file.
C. **User Management:**
   i. **Add Users:** Gives a user the ability to create new users in GovLink.
   ii. **Edit Users:** Gives a user the ability to edit permissions for existing GovLink users.
D. **Work Groups**
   i. **Work Group Add:** Allows user to create a work group and assign users to it.
   ii. **Work Group Edit:** Allows user to edit work group name, add, and remove users from an existing work group.

5. **The Permissions tab - FAMILY/DOMESTIC:**




**A. Filing Administration:**

i. **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.

ii. **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.

iii. **Add:** Allows a user to add additional parties within GovLink that were not initially pulled from LASES.

iv. **Delete:** Allows a user to delete a party that was pulled into GovLink from LASES.

v. **Edit Parties:** Allows a user to edit party details within GovLink.

B. **Manual Filing:**

i. **Accept Filing:** Allows users to manually accept filings within GovLink that they've received back from the court.

ii. **Manual File to Court:** This permission gives the user the ability to download and manually file with the appropriate court at locations. This permission can be delegated to other users who have this permission turned on.

iii. **Reject Filing:** Allows users to manually reject filings within GovLink that they've received back from the court and notate the rejection reason.

C. **Referrals:**
    i. **Accept Referrals:** Allows users to Accept a referral upon receiving it.
    ii. **Edit Referrals:** Allows a user to make edits to a referral after it has been created and/or sent.
    iii. **Reject Referrals:** Allows users to Accept a referral upon receiving it.
    iv. **Send Referrals:** Allows a user to create a referral and send to an individual or work group.

D. **Reporting:** User will not see the reporting option at the top of their dashboard if they don't have reporting permissions.
    i. **Generate Reports:** Gives users the ability to create Filing Status Change Report and/or Filing Status Snapshot Report.
    ii. **Export Reports:** Gives users the ability to export the generated Family/Domestic reports into an excel file.

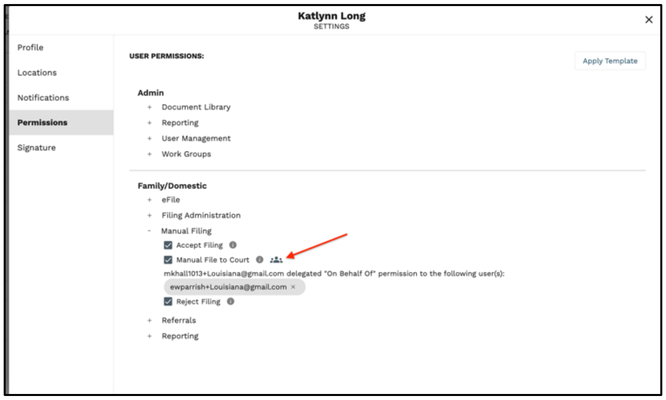
6. **Signature:** A user must have the eSign permission turned on in order to upload a signature to utilize within GovLink.
    A. Jpeg or png file types
    B. A transparent background on signatures is best. Reach out to our support team for help!

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

## DELEGATING ESIGN AND MANUAL FILE TO COURT PERMISSIONS

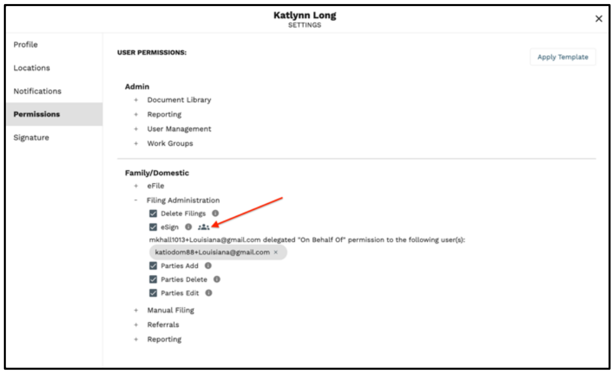
Users must already have the eSign or Manual File to Court permission turned on to be able to delegate that permission to other users.

### Delegate Manual Filing Permission:




1. Select permissions under your user settings drop down by clicking your initials in the upper right hand corner on your dashboard.
2. Expand Manual Filing permissions under Family/Domestic.
3. To the right of Manual File to Court, select the delegate icon.
4. Select the user(s) from the drop down that you wish to delegate your Manual File to Court permission.
5. Delegate this permission to multiple users by repeating steps 3 & 4.
6. Remove the delegated Manual File to Court permission by click the ‘x’ next to the user name you wish to remove the delegated permission from.

**Delegate eSign Permission:**

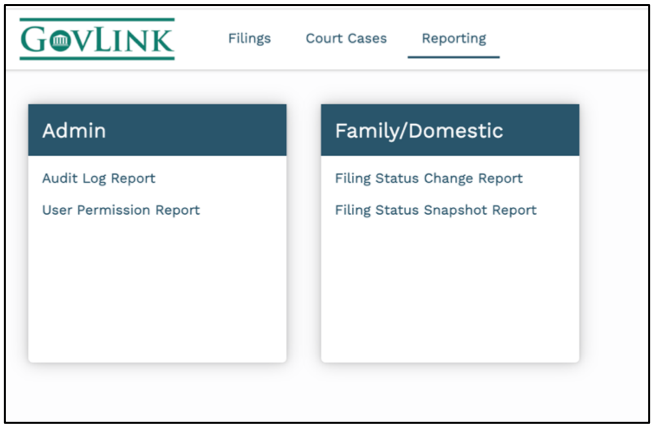



1. Select permissions under your user settings drop down by clicking your initials in the upper right-hand corner on your dashboard.
2. Expand Filing Administration permissions under Family/Domestic.
3. To the right of eSign, select the delegate icon.
4. Select the user(s) from the drop down that you wish to delegate your eSign permission.
5. Delegate this permission to multiple users by repeating steps 3 & 4.
6. Remove the delegated eSign permission by click the ‘x’ next to the user name you wish to remove the delegated permission from.

## REPORTING

Reports are user permission based. Users must either have permissions turned on for Admin reporting and/or Family/Domestic reporting to be able to generate and export reports.

If users have reporting permissions turned on they will be able to click Reporting tab at the top of the user’s dashboard.




**Admin:**

- **Audit Log Report** shows a user what actions have been taken on a filing based on location. This report can be filtered down by workgroup, user, action preformed, or case details.
- **User Permission Report** shows what users have what permission for a specified location.

**Family/Domestic:**

- **Filing Status Change Report** can show what filings are in a particular status in a selected time frame of a specified location.
- **Filing Status Snapshot Report** shows the number of filings that are in each status during a selected date and location.