

User Manual

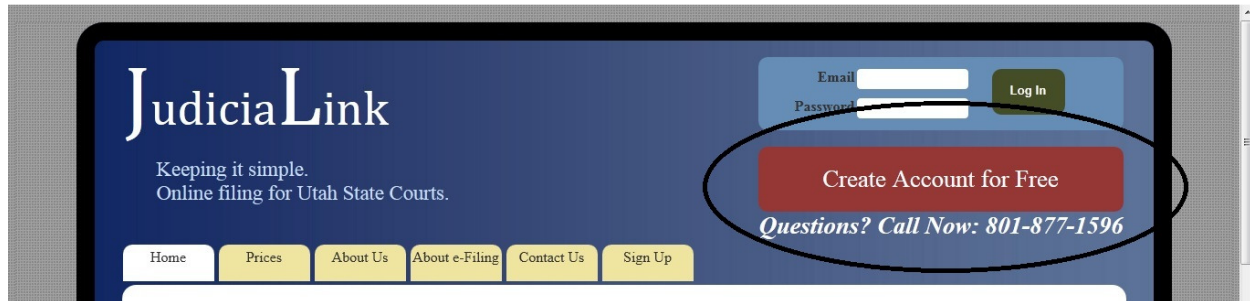
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Signing Up for a Free Trial

Step 1. Press the "Create Account for Free" Button.



- Creating an account does not commit you to anything. It merely creates information in Judicialink's database.
- The information you does not go into Judicialink's database until you have entered all of your information and pressed the final submit button.

Step 2. Enter your Law Firm's Information

The "Law Firm" information needs to be entered whether you are a solo practitioner or a firm of attorneys. It can be updated after sign-up as necessary.

The screenshot shows the 'CREATE NEW ACCOUNT' form, specifically Step 1: Enter Law Firm and Attorney Profile Information. The form is divided into two main sections: 'Law Firm Profile' and 'Filing Attorneys'.
Law Firm Profile:
- Law Firm Name: Scribner & McCandless, P.C.
- Principal Address: 2008 North University Ave Ste #220
- City: Provo, State: Utah, Zip: 84604
- Phone: 801-375-6600, Fax: 801-375-6607, Email: thomas@ssmlegal.com
Filing Attorneys:
A table with columns: First, Middle, Last, Suffix, Bar No, Primary Email, and a Remove button.
- Thomas, J, Scribner, , 4910, thomas@ssmlegal.com, Remove
- Donald, E, McCandless, , 5313, donald@ssmlegal.com, Remove
- Lorie, D, Fowlke, , 8575, lorie@ssmlegal.com, Remove
- Jacob, R, Powell, , 10423, jacob@ssmlegal.com, Remove
Below the table is an 'Add' button and an 'Instructions' link. At the bottom of the form are 'CANCEL' and 'NEXT >>' buttons.

- Every attorney must have a name, a bar number, and a primary email.
- Use the "Add" and "Remove" buttons to create as many attorneys as you need. We recommend that you add all of your firm's attorneys whether or not all of them will get a Judicialink plan.

Step 3. Enter your Users' Information

On the "User Information" page, you actually create the login accounts. This is where you initially create user names and passwords for each attorney and staff member you want to be able to e-file. The user name of every user is always an email address. The user's email address should be the one where you want notifications to be sent. If you want emails to be sent to multiple addresses, simply create an account for each email address.

CREATE NEW ACCOUNT

Step 2. Enter User Information

Every Judicialink account uses an email address for its user name and has a password. Each attorney must have at least one user account, but you may add an arbitrary number of accounts for staff. You must choose for each user which attorney the user has filing rights and account rights to. Please be aware that any email notices sent to an attorney will also be sent to every user-email that has filing rights to that attorney, so choose your filing rights with that in mind. Creating these accounts does not commit you to anything; you will be allowed to choose whether to start your free trial or sign up for a plan after you have created these accounts.

User Email Address	Password	Filing Rights	Account Rights	Finance Rights	
thomas@ssmlegal.com	abodefg	* Thomas J. Smith	* Thomas J. Smith	Yes	Remove
donald@ssmlegal.com	abodefg	* Donald E. Mc...	* Donald E. Mc...	Yes	Remove
lorie@ssmlegal.com	abodefg	* Lorie D. Fov...	* Lorie D. Fov...	Yes	Remove
jacob@ssmlegal.com	abodefg	* Jacob R. Pov...	* Jacob R. Pov...	Yes	Remove
devin@ssmlegal.com	abodefg	* Thomas J. Smith	* Thomas J. Smith	No	Remove
lore@ssmlegal.com	abodefg	* Select ...	* Select ...	No	Remove

Add

Instructions

PREVIOUS CANCEL NEXT

- You should set the initial user passwords to something easy to remember. Each attorney and staff member, after logging in, can and should change their passwords by going to the "Settings" menu.
- By default, the system adds an account for each attorney using the primary email address.
- You should link the users to attorneys by using the "Filing Rights" and "Account Rights" dropdown boxes. Most law firms will want the attorneys to be allowed to file on behalf of only themselves but may want staff members to be able to file on behalf of multiple attorneys. However, there is nothing restricting you from giving attorneys the right to file on behalf of each other, so long as you accept the risks inherent in doing so.
- Use the "Add" and "Remove" buttons to add as many users as necessary. There is no limit to how many users you can add.

Step 4. Review and Submit

The Review & Submit page is the last page in the account creation workflow. Pressing "Create Account Now" will take all of the information you entered and put it into the Judicialink database (if you do not press this button, none of your information will be saved in the database). Each user will be sent a Welcome email.

Signing Up for a Filing Plan

Step 1. Start a Free Trial

When you log in for the first time, the system will show you a "Start Free Trial Now" button.



Signing up will start a 30 day free trial, allowing you to file and download documents for free.

Step 2. Get a Plan

At any time after signing up for a free trial, you can sign up for a filing plan. You will not lose any days of your free trial by signing up for a monthly or annual plan. The most usual way to get a plan is to press the button that appears in your free trial expiration warning.

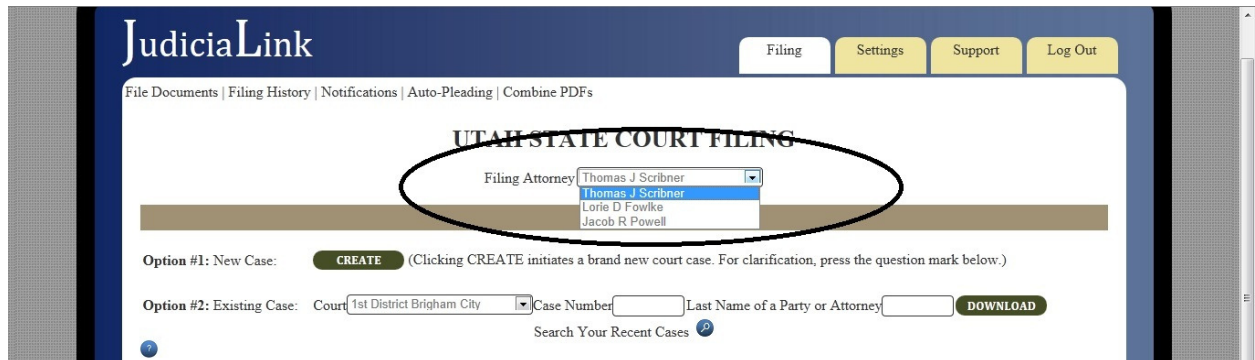


Alternatively, you can order a plan by going to the "Settings" tab, then "Plan Selection" or the "Billing" tab.

Downloading Case Information

Step 1. Select Filing Attorney

If your account has rights to file on behalf of multiple attorneys, always make sure you have selected the attorney for whom you intend to file. At the opening screen, there is a dropdown box that allows you to make this selection. A similar dropdown box appears at each place in the "Filing" and "Settings" tabs.



Step 2. Enter Case Information and Press the Download Button

In order to download a case, you normally enter the court, case number, and the last name of a party or attorney of record (or the judge), then press DOWNLOAD. All of the information must be exactly correct in order for the download to succeed. You must have the correct court (not just the district, but the actual court location!), the correct case number, and the last name must be spelled exactly as it is spelled in the court's internal CORIS database, otherwise the case will fail to download.

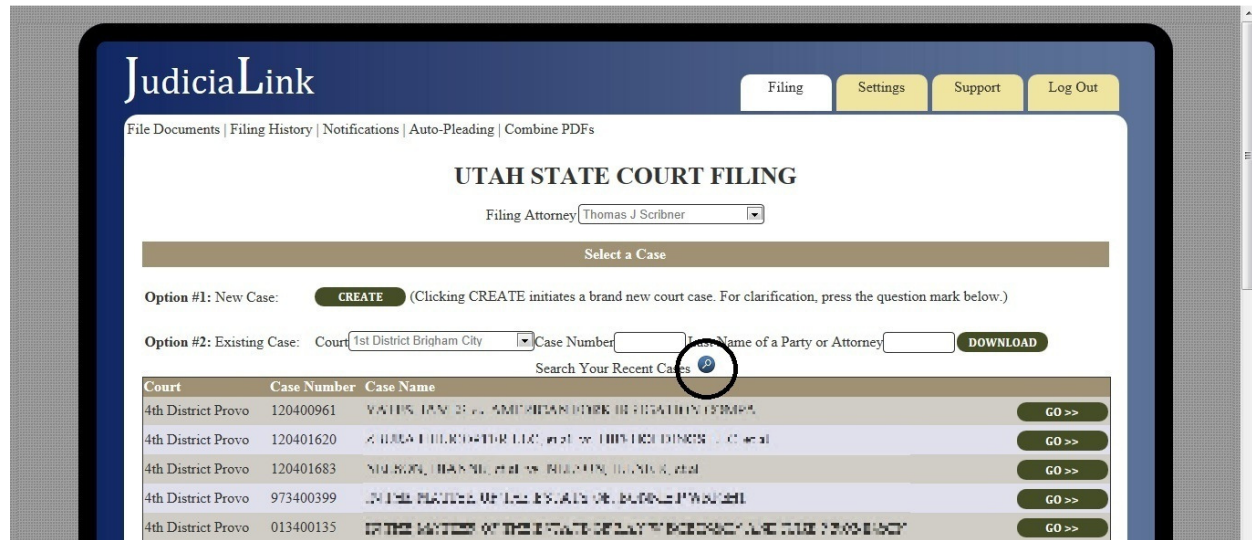


There is no way to search for a case using an e-filing service provider such as Judicialink if you do not know the case number. This is not because of any deficiency in Judicialink, but because the Administrative Office of the Courts has made a conscious decision to prohibit e-filing service providers from performing this type of search. The right to search for cases when you do not know the case number has been reserved exclusively to the xChange program.

In order to enhance convenience, Judicialink allows a much quicker way to download cases you have recently accessed, as follows:

Step 2 alternative. Download from "Recent Cases"

If you have downloaded or filed a case recently, it will show up in your "Recent Cases." Access this by pressing the blue search button just below the "Existing Case" information. The 20 most recent cases you accessed will appear in most-recently-accessed-first order.

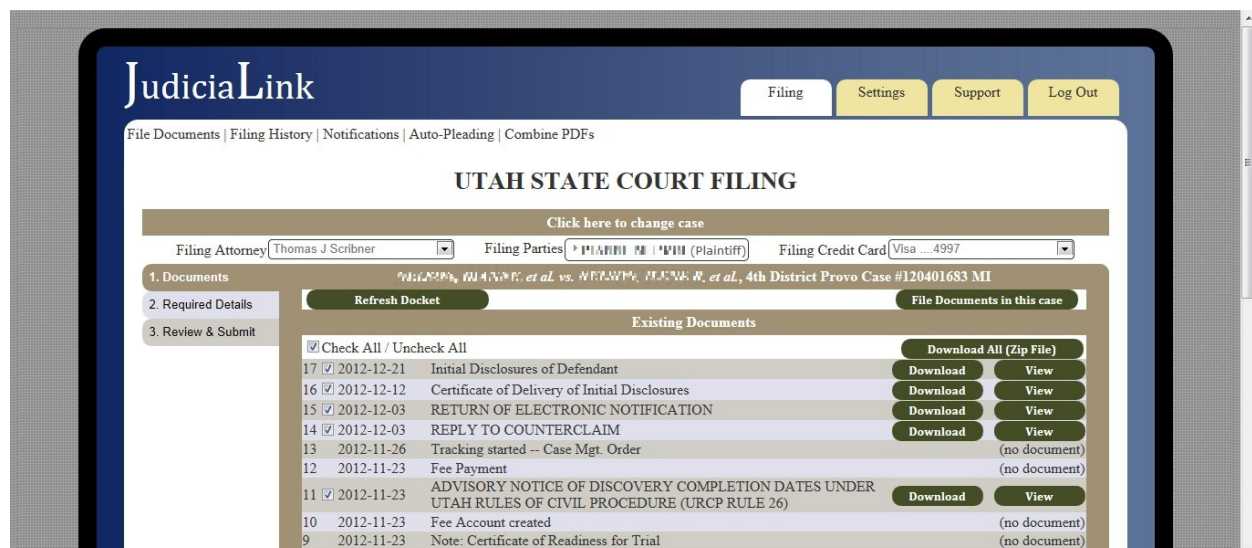


(sensitive information deliberately blurred in this picture)

Clicking on any part of the cases on the "Recent Cases" pulldown menu is the equivalent of entering the case information and will load the case as if you entered the case information in the fields above.

Step 3. Browse Documents

When you download a case, as long as you are an attorney of record, the docket appears, complete with document information and clerk/system notes. Each docket entry that has a downloadable document has "Download" and "View" buttons next to it which allow you to download and view documents for free.



(sensitive information deliberately blurred in this picture)

Step 4. Download Documents one at a time

The "Download" button is the most common way to download a document. It uses your browser's download button, which normally allows you to save or view the document. The "View" button will open the document in an inline viewer in your browser, using whichever plugin is your default PDF viewer in the browser.

Step 4 alternative. Download Multiple Documents in a Zipfile

The "Download All" button will download multiple documents in a zip file. Each document has a checkbox beside it to the left. These checkboxes determine which documents you want to download in the zip file. By default, all of the boxes are checked. There is a "Check All / Uncheck All" checkbox on top of the docket list on the left that allows you to check or uncheck all of the checkboxes at a time.

Other Feature. Check Party and Judge Information

By clicking on the case title bar, you can open a pull-down menu showing the party and judge information.

Other Feature. Change Case when Finished

When you are finished with this case and want to download another existing case or create a new case, click on the bar entitled "Click Here to Change Case" above the case title bar.

Filing in an Existing Case

Step 1. Download Case

Filing in an existing case always requires downloading that case's docket report first. This ensures that the case exists and that the connection with the court is working. Instructions for downloading case docket information are available in the previous section, "Downloading Case Information".

If you are an attorney of record, you will see a list of all of the existing documents, as follows:

The screenshot shows the JudicialLink interface for UTAH STATE COURT FILING. The user is logged in as Thomas J Scribner, Filing Attorney. The case is identified as *WILLIAMS, WILLIAM F. et al. vs. WILLIAMS, JAMES W. et al.*, 4th District Provo Case #120401683 MI. The interface includes a sidebar with navigation options: 1. Documents, 2. Required Details, and 3. Review & Submit. The main content area displays a list of existing documents under the heading "Existing Documents". The list includes documents such as "Initial Disclosures of Defendant", "Certificate of Delivery of Initial Disclosures", "RETURN OF ELECTRONIC NOTIFICATION", "REPLY TO COUNTERCLAIM", "Tracking started -- Case Mgt. Order", "Fee Payment", "ADVISORY NOTICE OF DISCOVERY COMPLETION DATES UNDER UTAH RULES OF CIVIL PROCEDURE (URCP RULE 26)", "Fee Account created", and "Note: Certificate of Readiness for Trial". Each document entry has a date, a checkbox, and buttons for "Download" and "View". A "Download All (Zip File)" button is also present. The interface also includes a "Refresh Docket" button and a "File Documents in this case" button.

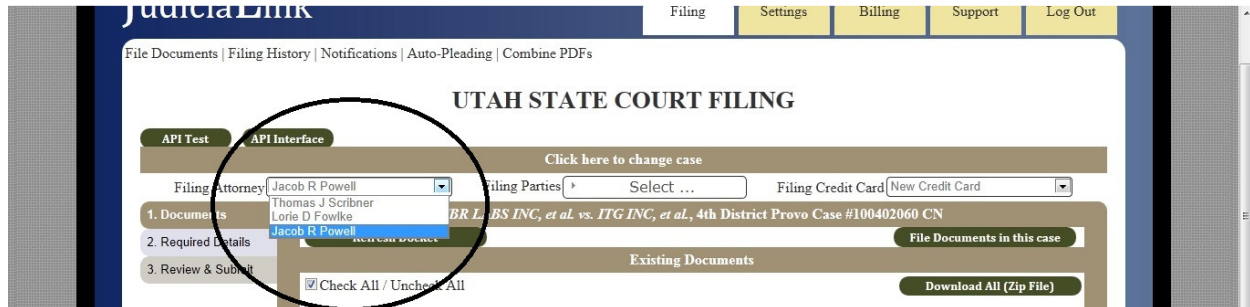
(sensitive information deliberately blurred in this picture)

If you are not yet an attorney of record, you will not see the documents, but can see party and judge information, as depicted below. You become an attorney of record by filing a document in the case.

The screenshot shows the JudicialLink interface for UTAH STATE COURT FILING. The user is logged in as Jacob R Powell, Filing Attorney. The case is identified as *TBR LABS INC, et al vs. ITG INC, et al.*, 4th District Provo Case #100402060 CN. The interface includes a sidebar with navigation options: 1. Documents, 2. Required Details, and 3. Review & Submit. The main content area displays a message for non-attorneys of record. The message states: "No existing documents are available to you in this case. Once you become an attorney of record in this case, you will be allowed to view all existing documents. The reason Judicialink cannot give you documents when you are not an attorney of record is because the Administrative Office of the Courts does not allow e-Filing Service Providers such as Judicialink to obtain such information, and will not even supply the information to Judicialink until it is requested on behalf of an attorney of record. This is a conscious choice on the part of the courts, in order to preserve revenue to the xChange system, which does allow such searches on behalf of attorneys who are not of record in a case (unlike Judicialink, xChange charges you for document downloads and does not allow you to file documents, so we recommend that you use xChange only to obtain the minimum number of documents necessary until you become an attorney of record). For your convenience, the following button will bring you to the xChange system, if you desire: [Go to xChange](#)". The interface also includes a "Refresh Docket" button and a "File Documents in this case" button. At the bottom, there are "CANCEL" and "NEXT >>" buttons.

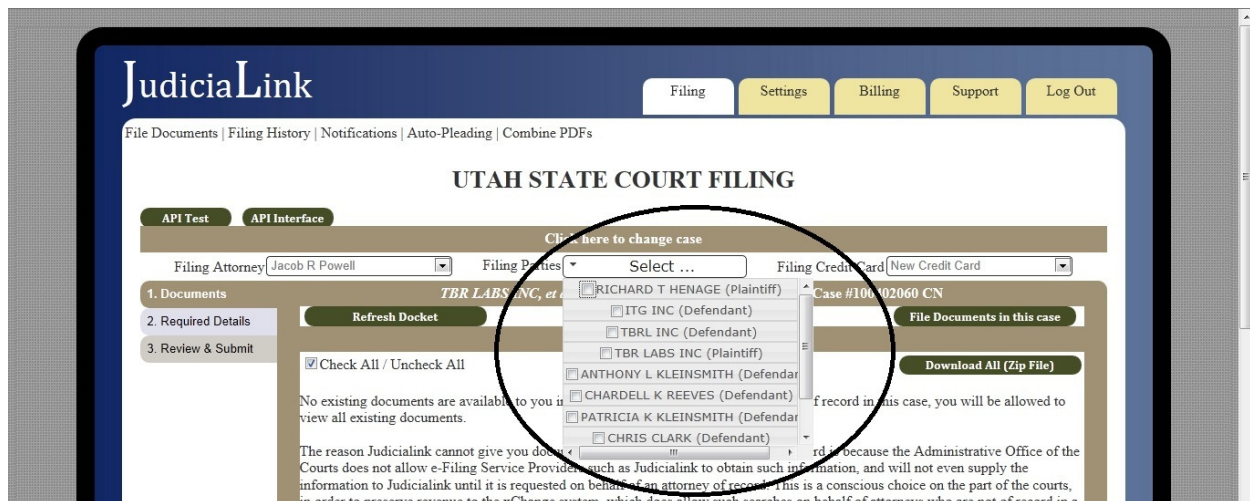
Step 2. Select Filing Attorney

The attorney on behalf of whom you are filing shows up just below the "Click here to change case" bar and can be changed using the dropdown menu.



Step 3. Select Filing Parties

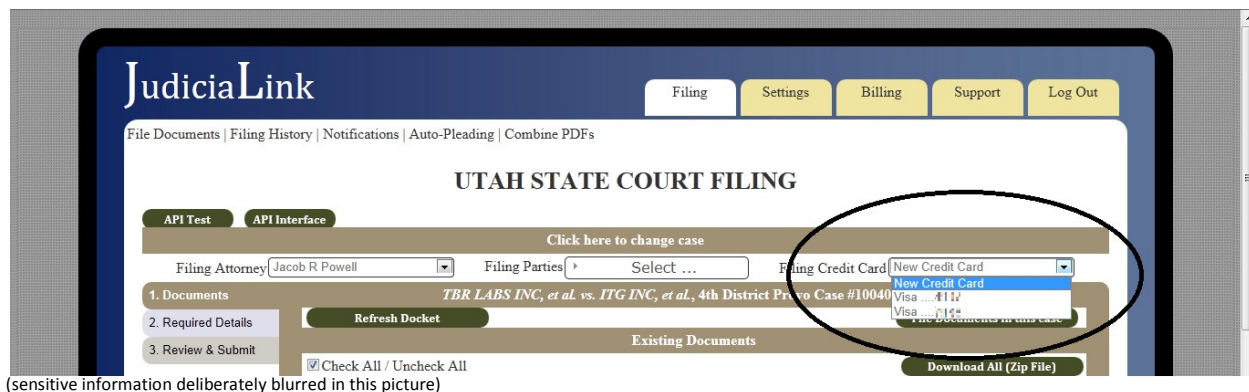
When you file documents, you should choose which party or parties you are filing for. Some document types do not require this information, but it is the best practice to check in every case.



Step 4. Select Filing Credit Card

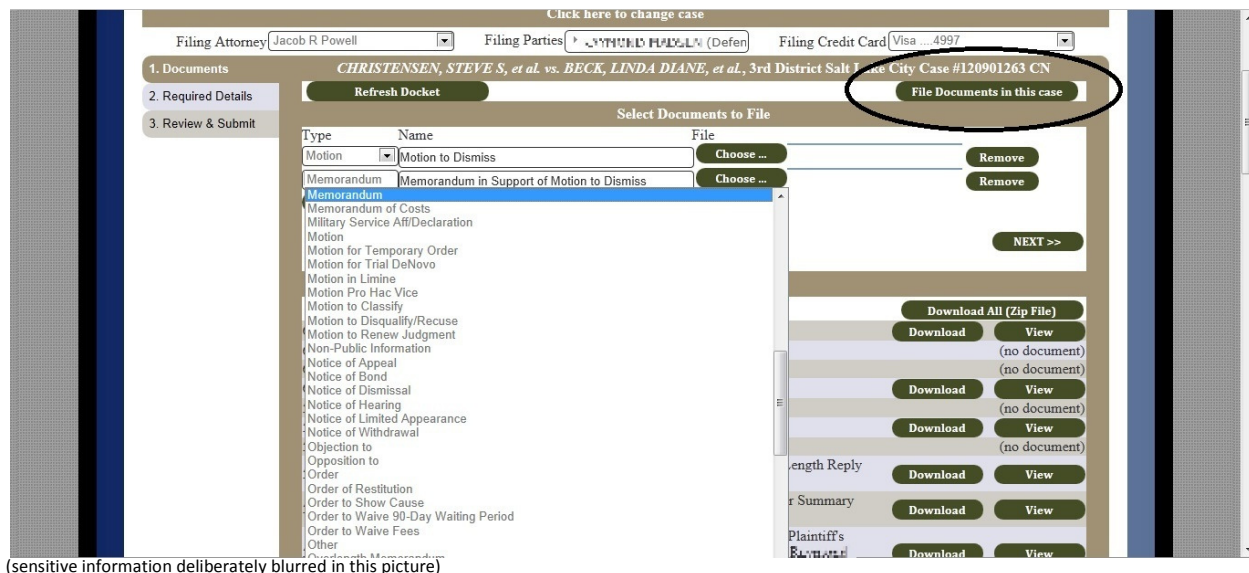
You are allowed to select a filing credit card with which to pay filing fees. If the document you file could require a fee, the credit card information will be passed to the court, and the court's system will charge the card according to the court's fee schedule.

Unless you have stored credit card information in your Settings, the only option available will be "New Credit Card." If this is the option selected, you will be required to enter credit card information at the Review & Submit screen, unless the document types you are filing have no fee associated with them. If you have stored credit cards, they will be available in this dropdown, but you will still have to enter the CVV code in the Review & Submit screen, since federal law prohibits storing CVV codes.



Step 5. Click "File Documents in This Case" Button and Enter Document Info

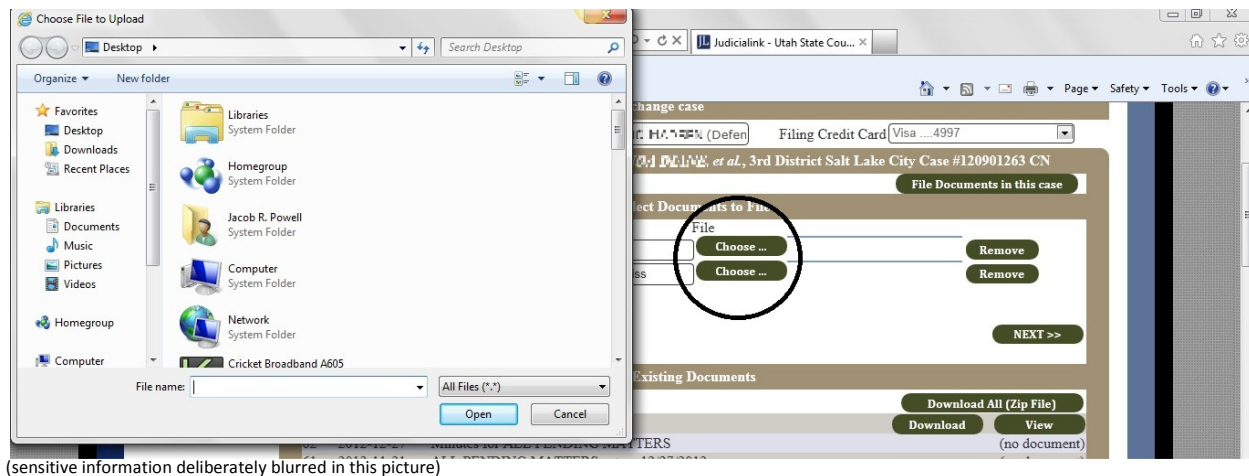
The "File Documents in This Case" button, located just under the case title, opens up a document input menu when you click it. Use the "Add" and "Remove" button to add as many documents as you wish.



You must first enter the document's type from a dropdown box. Then enter the name of the document as you wish it to appear on the docket. The document name field auto-populates when you choose a document type, but the name is free-form; you can enter any actual document name you wish.

Step 6. Upload Documents

When you click on the "Choose ..." button next to a document, your browser's upload feature will open up a window that allows you to choose which file to upload. Please be aware: All documents except for orders must be uploaded in PDF (Portable Document Format), and all orders must be submitted in RTF (Rich Text Format).



Step 6 alternative. Create Autopleading (instead of uploading a document)

Instead of uploading a file, you can choose to create a PDF or RTF file on the fly using Judicialink's unique Autopleading feature. Autopleadings can be accessed by clicking "Create Autopleading" instead of clicking "Choose ...". For details on how to create autopleadings, please refer to the section of this manual dedicated to that subject.

Step 7. Enter Required Details

Certain documents, such as returns of service, judgments, and garnishments, require additional details before submitting them. These further details are required by the Administrative Office of the Courts to be submitted with the filing. Other documents such as amended complaints and third party complaints allow you to update party information and case information. Whenever a filing type has required details, inputs for them will show up on the "Required Details" tab. You may not be able to predict which document types have required details, since the reasons for the requirements are historical rather than logical, so please always make sure that you fill in anything required on the Required Details page before filing.

Step 8. Review and Submit

The Review & Submit page allows you to revisit the information you previously entered, preview documents before filing, and enter the remaining credit card information if a filing fee is possible.

Step 10. Check Status

After you submit, you can check your document's status in several ways:

- Click on the "Check Status" button supplied after each filing
- Watch for the receipt and notice emails
- Go to your "Filing History" to look up what happened to the filing.
- Go to your "Notifications" to look what notifications have been received on this case.

Filing a New Case

Step 1. Press "CREATE" button

The CREATE button initiates a new case. The new case will not actually be uploaded to the court until the Submit button is pressed on the review screen.

The screenshot shows the JudicialLink interface for UTAH STATE COURT FILING. At the top, there's a navigation bar with links: Filing, Settings, Billing, Support, and Log Out. Below this, a sub-navigation bar includes: File Documents, Filing History, Notifications, Auto-Pleading, and Combine PDFs. The main heading is "UTAH STATE COURT FILING". Below the heading, there's a dropdown for "Filing Attorney" set to "Thomas J Scribner". A "Select a Case" bar is present. Under "Option #1: New Case", the "CREATE" button is circled in red. A tooltip explains: "(Clicking CREATE initiates a brand new court case. For clarification, press the question mark below.)". Under "Option #2: Existing Case", there's a dropdown for "Court" set to "4th District Brigham City", a "Case Number" field, a "Last Name of a Party or Attorney" field, and a "DOWNLOAD" button. A "Search Your Recent Cases" link is also visible.

A payment warning will appear warning you that payment is required, and fields will appear for you to enter necessary information. You can navigate the menu using either the side menus or the navigation bar below.

This screenshot shows the next step in the filing process. A red warning box at the top states: "Payment is required for this type of filing. Your credit card will be charged by the court according to the court's fee schedule when you submit. The fee schedule can be accessed conveniently by clicking on this button: Fee Schedule". Below the warning, there's a "Click here to change case" bar. The "Filing Attorney" dropdown remains "Thomas J Scribner". The "Filing Court" dropdown is now "4th District Provo", and the "Filing Credit Card" dropdown is "Visa ...4997". On the left, a "Side Menus" bar lists: 1. Parties, 2. AKA / DBA, 3. Attorneys, 4. Documents to File, 5. Required Details, and 6. Review & Submit. The main area is titled "Enter Party Names" and contains a table for adding parties. The table has columns for Role, Name (First, Middle, Last / Business, Suffix), and buttons for Details and Remove. Two rows are shown: Plaintiff and Defendant. An "Add" button is at the bottom left of the table. Below the table, there are links for "Add Client" and "Instructions". At the bottom, a "Navigation Bar" contains "CANCEL" and "NEXT >>" buttons. Arrows point from labels to these elements: "Payment warning" to the red box, "Side Menus" to the left bar, and "Navigation Bar" to the bottom buttons.

Step 2. Select Filing Attorney

The attorney on behalf of whom you are filing shows up just below the "Click here to change case" bar and can be changed using the dropdown menu.

File Documents | Filing History | Notifications | Auto-Pleading | Combine PDFs

UTAH STATE COURT FILING

⚠ Payment is required for this type of filing. Your credit card will be charged by the court according to the court's fee schedule when you submit.
 The fee schedule can be accessed conveniently by clicking on this button: [Fee Schedule](#)

[Click here to change case](#)

Filing Attorney: Thomas J Scribner | Filing Court: 4th District Provo | Filing Credit Card: Visa ...4997

1. Parties

Enter Party Names				
	First	Middle	Last / Business	Suffix
1. Parties	Lorie D	Fowlke		
2. AKA / DBA	Jacob R	Powell		
3. Attorneys				
4. Documents to File				

Role: Plaintiff | Add

[Details ...](#) [Remove](#)

Step 3. Select Filing Court

Next to the filing attorney dropdown box is a dropdown box to select the district court you are filing in. Please be careful that you are filing in the correct court (the actual court location within the district, not just the correct district)

File Edit View Favorites Tools Help

File Documents | Filing History | Notifications | Auto-Pleading | Combine PDFs

UTAH STATE COURT FILING

⚠ Payment is required for this type of filing. Your credit card will be charged by the court according to the court's fee schedule when you submit.
 The fee schedule can be accessed conveniently by clicking on this button: [Fee Schedule](#)

[Click here to change case](#)

Filing Attorney: Thomas J Scribner | Filing Court: 4th District Provo | Filing Credit Card: Visa ...4997

1. Parties

Enter Party Names				
	First	Middle	Last / Business	Suffix
1. Parties	Lorie D	Fowlke		
2. AKA / DBA	Jacob R	Powell		
3. Attorneys				
4. Documents to File				

Role: Plaintiff | Add

[Details ...](#) [Remove](#)

Filing Court Dropdown Menu:

- 4th District American Fork
- 4th District Fillmore (no card transactions)
- 4th District Helper City
- 4th District Nephalem
- 4th District Orem (no new filings)
- 4th District Provo
- 4th District Salem
- 4th District Spanish Fork
- 5th District Beaver
- 5th District Cedar City
- 5th District St George
- 6th District Junction (no card transactions)
- 6th District Kanab (no card transactions)
- 6th District Loa
- 6th District Manti
- 6th District Panguitch
- 6th District Richfield
- 7th District Castle Dale
- 7th District Moab
- 7th District Monticello
- 7th District Price
- 8th District Duchesne
- 8th District Manila (no card transactions)
- 8th District Roosevelt
- 8th District Vernal
- Test District Court

Step 4. Select Filing Credit Card

You are allowed to select a filing credit card with which to pay filing fees. If the document you file could require a fee, the credit card information will be passed to the court, and the court's system will charge the card according to the court's fee schedule.

File Documents | Filing History | Notifications | Auto-Pleading | Combine PDFs

UTAH STATE COURT FILING

⚠ Payment is required for this type of filing. Your credit card will be charged by the court according to the court's fee schedule when you submit.
 The fee schedule can be accessed conveniently by clicking on this button: [Fee Schedule](#)

[Click here to change case](#)

Filing Attorney: Thomas J Scribner | Filing Court: 4th District Provo | Filing Credit Card: Visa ...4997

1. Parties

Enter Party Names				
	First	Middle	Last / Business	Suffix
1. Parties	Lorie D	Fowlke		
2. AKA / DBA	Jacob R	Powell		
3. Attorneys				
4. Documents to File				

Role: Plaintiff | Add

[Details ...](#) [Remove](#)

Filing Credit Card Dropdown Menu:

- Visa ...4997
- New Credit Card
- Visa ...4997
- Visa ...7966

Unless you have stored credit card information in your Settings, the only option available will be "New Credit Card." If this is the option selected, you will be required to enter credit card information at the

Review & Submit screen, unless the document types you are filing have no fee associated with them. If you have stored credit cards, they will be available in this dropdown, but you will still have to enter the CVV code in the Review & Submit screen, since federal law prohibits storing CVV codes.

Step 5. Enter Parties

When you file a new case, you must provide not only the documents, but all of the initial docket information, including parties, aliases, and attorneys. The information you enter on these menus takes the place of clerk entry and will actually control how the parties, aliases, and attorneys show up on the docket. You may navigate either by pressing the <<PREVIOUS and NEXT>> buttons or by clicking on the side buttons.

Please take note of the DETAILS button, which allows you to enter address, telephone, and other information for the parties, aliases, and attorneys. The menu that opens and closes when the DETAILS button is pressed appears as follows:

The screenshot shows the 'UTAH STATE COURT FILING' web application. At the top, there is a navigation bar with links: Filing, Settings, Billing, Support, and Log Out. Below this is a sub-navigation bar with links: File Documents, Filing History, Notifications, Auto-Pleading, and Combine PDFs. The main heading is 'UTAH STATE COURT FILING'. A warning message states: 'Payment is required for this type of filing. Your credit card will be charged by the court according to the court's fee schedule when you submit. The fee schedule can be accessed conveniently by clicking on this button: Fee Schedule'. Below the warning is a link: 'Click here to change case'. The form includes fields for Filing Attorney (Thomas J Scribner), Filing Court (4th District Provo), and Filing Credit Card (Visa ...4997). The main section is 'Enter Party Names'. It has a sidebar with tabs: 1. Parties, 2. AKA / DBA, 3. Attorneys, 4. Documents to File, 5. Required Details, and 6. Review & Submit. The 'Enter Party Names' section has a table with columns: Role, Name: First, Middle, Last / Business, Suffix, and a 'Details ...' button. The first row shows a Plaintiff named George Washington with address 123 Revolution Hwy, Salt Lake City, Utah, 84111. Below this are fields for Home Phone, Bus Phone, Fax, SSN, DOB, DLN, and DL State. There are 'Remove', 'Add', and 'Add Client' buttons. A second row shows a Defendant named Abraham Lincoln with a 'Details ...' and 'Remove' button.

Party names should conform to the CORIS data standards, which restrict punctuation, apostrophes, and other special characters (hyphens are allowed) from being in party names.

The "Add" and "Remove" buttons allow you to choose as many parties as desired. None of the party information is actually uploaded to the court until the entire case creation process is completed.

Step 5 alternative. Load Parties from Client List

For those attorneys that file on behalf of one client multiple times, the "Add Client" button will allow an attorney to access a pull-down menu for automatic loading of a client's information as a party.

UTAH STATE COURT FILING

Payment is required for this type of filing. Your credit card will be charged by the court according to the court's fee schedule when you submit. The fee schedule can be accessed conveniently by clicking on this button: [Fee Schedule](#)

[Click here to change case](#)

Filing Attorney: Thomas J Scribner Filing Court: 4th District Provo Filing Credit Card: Visa ...4997

1. Parties

Enter Party Names

Role	Name: First	Middle	Last / Business	Suffix	Details ...	Remove
Plaintiff	George		Washington		Details ...	Remove
Defendant	Abraham		Lincoln		Details ...	Remove

[Add](#) [Add Client](#)

2. AKA / DBA

3. Attorneys

4. Documents to File

5. Required Details

6. Review & Submit

(sensitive information deliberately blurred in this picture)

Step 6. Enter AKA / DBA names, if any

The AKA / DBA menu allows you to enter alias information for parties. You must choose the party to whom the AKA/DBA applies, choose which kind of AKA (Also Known As, Doing Business As, Now Known As, etc.), then enter the information.

JudiciaLink

Filing Settings Billing Support Log Out

File Documents | Filing History | Notifications | Auto-Pleading | Combine PDFs

UTAH STATE COURT FILING

Payment is required for this type of filing. Your credit card will be charged by the court according to the court's fee schedule when you submit. The fee schedule can be accessed conveniently by clicking on this button: [Fee Schedule](#)

[Click here to change case](#)

Filing Attorney: Thomas J Scribner Filing Court: 4th District Provo Filing Credit Card: Visa ...4997

1. Parties

2. AKA / DBA

Enter Party Aliases

Party	Alias Type	Name: First	Middle	Last / Business	Suffix	Details ...	Remove
Abraham Lincoln	Also Known As	Honest		Abe		Details ...	Remove

[Add](#) [Add Client](#)

3. Attorneys

4. Documents to File

5. Required Details

6. Review & Submit

The "Add" and "Remove" buttons allow you to choose as many aliases as desired. None of the alias information is actually uploaded to the court until the entire case creation process is completed.

Step 7. Enter Attorney Information

You must enter the information for the attorneys you wish to create on the case and which parties they are representing. You can use the "Add" and "Remove" buttons to create as many attorneys as desired.

The "Add" and "Remove" buttons allow you to choose as many attorneys as desired, although the first attorney's information is prepopulated with the filing attorney's information. None of the attorney information is actually uploaded to the court until the entire case creation process is completed.

Step 8. Enter Document Information

You must first enter the document's type from a dropdown box. Then enter the name of the document as you wish it to appear on the docket. The document name field auto-populates when you choose a document type, but the name is free-form; you can enter any actual document name you wish.

Step 7. Upload Documents

When you click on the "Choose ..." button next to a document, your browser's upload feature will open up a window that allows you to choose which file to upload. Please be aware: All documents except for orders must be uploaded in PDF (Portable Document Format), and all orders must be submitted in RTF (Rich Text Format).

Step 7 alternative. Create Autopleading (instead of uploading a document)

Instead of uploading a file, you can choose to create a PDF or RTF file on the fly using Judicialink's unique Autopleading feature. Autopleadings can be accessed by clicking "Create Autopleading" instead of clicking "Choose ...". For details on how to create autopleadings, please refer to the section of this manual dedicated to that subject.

Step 8. Choose Case Type and Other Required Details

The Required Details menu for a new case always requests that you enter the case type. This case type will be important for categorizing the case and in some instances may affect the filing fee.

Step 9. Review and Submit

The Review & Submit page allows you to revisit the information you previously entered, preview documents before filing, and enter the remaining credit card information if a filing fee is possible.

Step 10. Check Status

After you submit, you can check your document's status in several ways:

- Click on the "Check Status" button supplied after each filing
- Watch for the receipt and notice emails
- Go to your "Filing History" to look up what happened to the filing.

Go to your "Notifications" to look what notifications have been received on this case.

Creating PDF and RTF files in general

Point 1. Utah Court Document Requirements

The Utah State courts require you to file PDF files for everything except orders, which must be submitted in RTF. Judicialink will produce an error if you try to upload a PDF where an RTF should be or an RTF where a PDF should be. The Administrative Office of the Courts has instructed us that, where possible, PDFs should be created in a text-searchable format, but realistically, the system does not reject documents if they are not text-searchable.

Point 2. Creating PDF and RTF files in general

PDF (Portable Document Format) is a format developed by Adobe that has become the most common interchange format for documents because of its unique page-based qualities and because they are hard to edit. There are several ways to create a PDF document

- In word processors that have the option, choose Save As PDF when you save a document (this will produce a searchable PDF).
- Download a PDF printer online such as cutepdf, then print your documents directly from your word processor to a PDF format (this will produce a searchable PDF).
- Buy Adobe Acrobat Writer to create or modify PDFs
- Scan the document in a scanner that outputs in PDF (this will not produce a searchable PDF).
- Use Judicialink's Autopleading feature to create PDFs
- Use Judicialink's Combine/Split PDF feature to attach exhibits or split up PDF documents

RTF (Rich Text Format) is the native format of Microsoft Wordpad. It is not page-based like PDFs, and it is easy to edit, unlike PDFs. The reason why the state courts have asked that orders be submitted in RTF is so that the judges can edit the document before signing. RTF can be created by using the Save As feature of any modern word processor.

Point 3. Using Judicialink's PDF tools

Judicialink presently has two PDF tools: (1) Autopleadings and (2) Combine/Split PDFs. The Autopleadings tool allows you to create PDF and RTF pleadings on the fly. The Combine/Split tool is a simple tool very useful for attaching exhibits and splitting documents. The next sections of this manual are dedicated to using these tools.

Using the Autopleading Tool

Step 1. Press the Create Autopleadings Button from the Documents Menu

The Autopleading tool allows you to create simple PDF and RTF pleadings on the fly. To begin, from the Documents menu, and instead of pressing the "Choose ..." button to upload a file, press the "Create Autopleadings" button.

The screenshot shows the JudiciaLink interface for UTAH STATE COURT FILING. The top navigation bar includes links for Filing, Settings, Billing, Support, and Log Out. Below the header, there are links for File Documents, Filing History, Notifications, Auto-Pleading, and Combine PDFs. The main heading is 'UTAH STATE COURT FILING'. A warning message states: 'Payment is required for this type of filing. Your credit card will be charged by the court according to the court's fee schedule when you submit. The fee schedule can be accessed conveniently by clicking on this button: Fee Schedule'. Below this, there is a section 'Click here to change case' with dropdown menus for Filing Attorney (Thomas J Scribner), Filing Court (4th District Provo), and Filing Credit Card (Visa ...4997). The left sidebar has a menu with items: 1. Parties, 2. AKA / DBA, 3. Attorneys, 4. Documents to File (selected), 5. Required Details, and 6. Review & Submit. In the main area, under 'Select Documents to File', there is a table with columns 'Type', 'Name', and 'File'. The 'Type' dropdown is set to 'Complaint', and the 'Name' field contains 'Complaint'. Below the table, the 'Create Autopleadings' button is circled in red.

Step 2. Enter the Data

The autopleading is meant to create very simple pleadings when you need to submit a filing quickly or from an inconvenient location. You first start out on the "edit" menu, which shows the form of a pleading with several portions that can be edited.

The screenshot shows the JudiciaLink interface for AUTO-PLEADING. The top navigation bar includes links for Filing, Settings, Billing, Support, and Log Out. Below the header, there are links for File Documents, Filing History, Notifications, Auto-Pleading, and Combine PDFs. The main heading is 'AUTO-PLEADING'. A warning message states: 'ALWAYS PROOF YOUR DOCUMENTS by downloading and viewing before you file. This autopleading generator comes is not guaranteed to be error-free, so the only way to ensure that the documents filed contain what you want is to preview them first!'. Below this, there is a section 'Document Input' with a 'Preview & Create' button. The 'Edit' menu is selected, showing a form for entering case details. The form includes fields for Plaintiff, Defendant, Case Number, Judge, and Date. The 'Create Autopleadings' button is visible at the bottom.

While some of the data in the autopleading is pre-populated by Judicialink, you should edit the data to match your needs before using the autopleading in a filing. The pre-populated data is intended to be helpful, but you take full responsibility for the the legal correctness or applicability of your contents, and Judicialink takes no responsibility for the same. It is expected that you will enter the data that suits your needs, then use the Preview & Create menu to make sure it was entered correctly.

Step 3. Preview and Create

The Preview & Create menu allows you to review your data in a more readable format, then has four options:

- Download PDF (this will allow you to proof or save your PDF file)
- Download RTF (this will allow you to proof or save your RTF file)
- File PDF (this will upload the PDF and return you to the Documents menu)
- File RTF (this will upload the RTF and return you to the Documents menu)

The screenshot displays the 'AUTO-PLEADING' section of the Judicialink website. At the top, there is a navigation bar with links for Filing, Settings, Billing, Support, and Log Out. Below this, a breadcrumb trail shows 'File Documents | Filing History | Notifications | Auto-Pleading | Combine PDFs'. A warning message states: 'ALWAYS PROOF YOUR DOCUMENTS by downloading and viewing before you file. This autopleading generator comes is not guaranteed to be error-free, so the only way to ensure that the documents filed contain what you want is to preview them first!'. The main content area is titled 'AUTO-PLEADING' and features a 'Preview' tab. The document being previewed is a 'Complaint' filed in the 'Fourth Judicial District Court, Utah County, State of Utah, Provo Department'. The document includes the name 'Thomas J. Scribner (4910)' and contact information for 'Scribner McCandless & Fowlke, P.C.'. The case number is '2696 North University Ave Ste 220, Provo, UT 84604'. The document is dated 'January 2, 2013'. The signature is 'Thomas J. Scribner, Attorney at Law'. The document is titled 'Mailing Certificate' and states: 'I hereby certify that the foregoing was sent via the following means, on the 2 day of January, 2013, to the following individuals:'. The interface also includes buttons for 'Download PDF', 'Download RTF', 'File PDF', and 'File RTF'.

Step 4. Multiple Documents

When there are multiple documents, the Autopleading menus allow you to create autopleadings for all the documents, and to download or insert into the filing some or all.

The screenshot displays the 'AUTO-PLEADING' section of the Judicialink website, showing the 'Document Input' menu. The navigation bar and breadcrumb trail are the same as in the previous screenshot. The warning message is also present. The 'Document Input' menu is open, showing options for 'Complaint (Click to View/Hide Auto-Pleading)' and 'Return of Service (Click to View/Hide Auto-Pleading)'. The interface also includes buttons for 'Edit', 'Preview & Create', 'Restore Default Documents', and 'Resume Filing'.

Each document title has the words "Click to View/Hide Auto-Pleading" by it. By clicking on the title of the document, you open and close the Edit window for that document.

The screenshot shows the 'AUTO-PLEADING' tool interface. At the top, a warning message states: 'ALWAYS PROOF YOUR DOCUMENTS by downloading and viewing before you file. This autopleading generator comes is not guaranteed to be error-free, so the only way to ensure that the documents filed contain what you want is to preview them first!'. Below this, the 'Document Input' section is active. It includes a 'Restore Default Documents' button and a 'Resume Filing' button. The main area contains a list of documents: 'Complaint (Click to View/Hide Auto-Pleading)' and 'Return of Service (Click to View/Hide Auto-Pleading)'. Below the list, there are input fields for 'Margins in Inches: Top 2 Right 1 Bottom 1 Left 1'. A text area contains the following address: 'Thomas J Scribner (4910) Scribner McCandless & Fowlke, P.C. 2696 North University Ave Ste 220 Provo, UT 84604 Tel 801-375-5600 Fax 801-375-5607'. Below the text area, there is a dropdown menu showing 'IN THE FOURTH JUDICIAL DISTRICT COURT UTAH COUNTY, STATE OF UTAH, PROVO DEPARTMENT'.

The Preview & Create screen had two additional options when there are multiple documents:

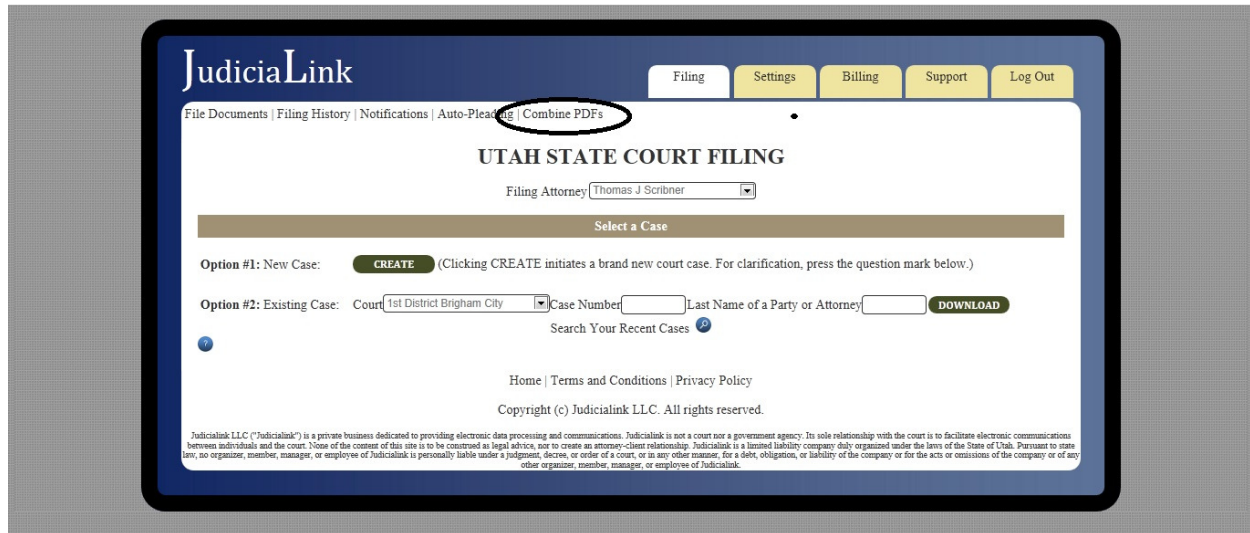
- Download All (download all autopleadings in a zip file)
- File All (upload all autopleadings into your filing)

The screenshot shows the 'AUTO-PLEADING' tool interface, specifically the 'Preview' section. The 'Preview & Create' tab is selected. The 'Download All' and 'File All' buttons are highlighted with a black circle. The 'Resume Filing' button is also visible. The document list and address information are the same as in the previous screenshot.

The Autopleading tool has an ALWAYS PROOF YOUR DOCUMENTS warning because it is not a fully tested word processor, but a simple document creation tool. You need to ensure that your document is coming out the way you intend it. The best way to proof your documents is to click "Download PDF" or "Download RTF" and review the documents one by one before hitting "File PDF" to insert them directly into the filing.

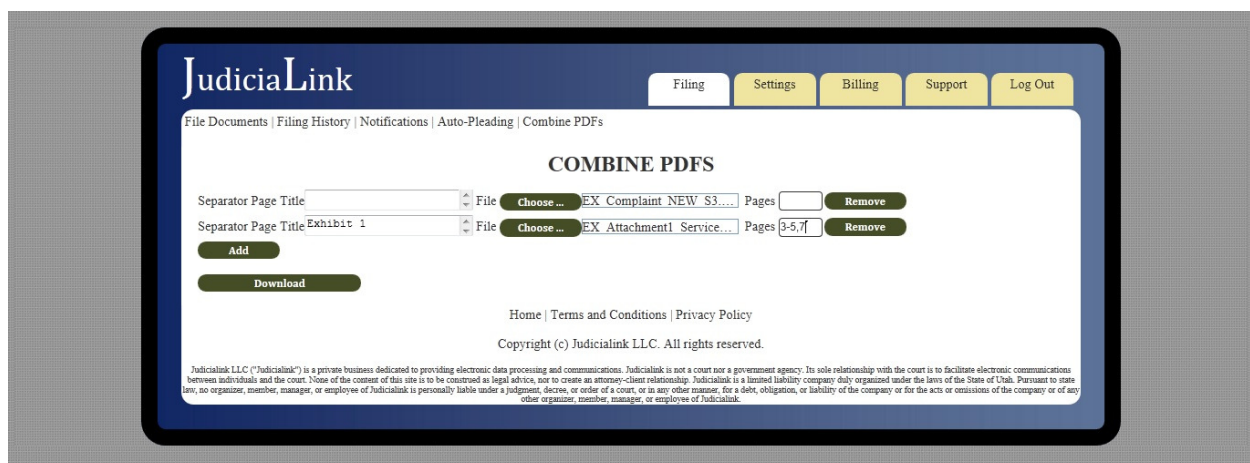
Using the Combine/Split PDF Tool

The Combine/Split PDFs tool is a very simple but very powerful tool. Its purpose is to allow you to string together exhibits and split documents. It can be accessed by pressing the "Combine PDFs" menu under the "Filing" tab.



The Combine/Split PDFs tool allows you to use "Add" and "Remove" buttons to put together as many documents as you wish, and has the following three pieces of data for you to enter for every document:

- Separator Page (this will create a PDF separator page with the desired text)
- Upload Document (this uploads the document)
- Pages (this allows you to choose which pages of the PDF to include, delimited by commas or hyphens; doing this allows you to split PDFs).



When you are done, hit the "Download" button and voila! You have a combined PDF.

Settings

Law Firm Profile

On this menu, you can edit your firm's information. This information is stored in Judicialink's database but is not updated with the court.

The screenshot shows the 'PROFILE SETTINGS' page for a Law Firm Profile. The page has a blue header with the 'JudicialLink' logo and navigation buttons: 'Filing', 'Settings' (active), 'Billing', 'Support', and 'Log Out'. Below the header, there's a breadcrumb 'Profile Settings | Plan Selection'. The main content area is titled 'PROFILE SETTINGS' and shows the 'Filing Attorney' as 'Jacob R Powell'. On the left, a sidebar lists navigation options: 'Law Firm Profile' (selected), 'Law Firm Attorneys', 'Law Firm Credit Cards', 'Attorney Profile', 'User Password', 'User Permissions', and 'User Preferences'. The 'Law Firm Profile' section contains fields for 'Law Firm Name' (Scribner McCandless & Fowlke, P.C.), 'Principal Address' (2696 North University Ave Ste 220), 'City' (Provo), 'State' (Utah), 'Zip' (84604), 'Phone' (801-375-5600), 'Fax' (801-375-5607), and 'Email' (thomas@ssmlegal.com). A 'SAVE' button is at the bottom. An 'Instructions' link is also visible.

Law Firm Attorneys

This setting allows you to add, remove, and transfer attorneys.

The screenshot shows the 'PROFILE SETTINGS' page for Law Firm Attorneys. The page layout is similar to the previous one, with the 'Settings' tab active. The sidebar lists navigation options: 'Law Firm Profile', 'Law Firm Attorneys' (selected), 'Law Firm Credit Cards', 'Attorney Profile', 'User Password', 'User Permissions', and 'User Preferences'. The main content area is titled 'PROFILE SETTINGS' and shows the 'Filing Attorney' as 'Jacob R Powell'. The 'Law Firm Attorneys' section is titled 'Filing Attorneys of Scribner McCandless & Fowlke, P.C.' and contains a table with columns 'Filer Name' and 'Filer Bar Number'. The table lists three attorneys: Thomas J Scribner (4910), Lorie D Fowlke (6875), and Jacob R Powell (10423). Each row has a 'REMOVE' button. Below the table is a 'TRANSFER' button and a 'Transfer from Another Group' field. The 'Create New Filing Attorneys' section has fields for 'First', 'Middle', 'Last', 'Suffix', and 'Bar No Primary Email', with an 'Add' button. A 'SAVE' button is at the bottom. An 'Instructions' link is also visible.

Law Firm Credit Cards

This menu allows you to store credit cards (all but the CVV number, which federal law prohibits from being stored).

The screenshot shows the 'JudicialLink' interface with a top navigation bar containing 'Filing', 'Settings', 'Billing', 'Support', and 'Log Out'. Below the header, the page is titled 'PROFILE SETTINGS' with a sub-header 'Filing Attorney: Jacob R Powell'. A left sidebar lists navigation options: 'Law Firm Profile', 'Law Firm Attorneys', 'Law Firm Credit Cards' (highlighted), 'Attorney Profile', 'User Password', 'User Permissions', and 'User Preferences'. The main content area is titled 'Existing Cards Used to Pay the Court' and contains a form with fields for 'Cardholder', 'Addr', 'City', 'State' (dropdown), 'Zip', 'Type' (dropdown), 'Card #', 'Month' (dropdown), 'Year' (dropdown), 'Nickname', and 'Card'. There are 'Add' and 'Remove' buttons, and a 'SAVE' button at the bottom. An 'Instructions' link is also visible.

Attorney Profile

This menu allows you to change the profile of an existing attorney. When you press "Save," the attorney's profile will be updated both in Judicialink and in the Utah courts.

The screenshot shows the 'JudicialLink' interface with a top navigation bar containing 'Filing', 'Settings', 'Billing', 'Support', and 'Log Out'. Below the header, the page is titled 'PROFILE SETTINGS' with a sub-header 'Filing Attorney: Jacob R Powell'. A left sidebar lists navigation options: 'Law Firm Profile', 'Law Firm Attorneys', 'Law Firm Credit Cards', 'Attorney Profile' (highlighted), 'User Password', 'User Permissions', and 'User Preferences'. The main content area is titled 'Profile of Jacob R Powell' and contains a form with fields for 'Name' (first, last, middle), 'Address', 'City', 'State' (dropdown), 'Zip', 'Country' (dropdown), 'Bus Phone', 'Fax', 'Email', and 'Does this attorney file on behalf of Government entities?'. There is a 'SAVE' button at the bottom. An 'Instructions' link is also visible.

User Password

This setting allows you to change your password. Each user has a unique password.

The screenshot shows the 'User Password' section of the 'PROFILE SETTINGS' page. The page has a blue header with the 'JudiciaLink' logo and navigation buttons: 'Filing', 'Settings', 'Billing', 'Support', and 'Log Out'. Below the header, there's a breadcrumb 'Profile Settings | Plan Selection'. The main content area is titled 'PROFILE SETTINGS' and shows the 'Filing Attorney' as 'Jacob R Powell'. A sidebar on the left lists various settings: 'Law Firm Profile', 'Law Firm Attorneys', 'Law Firm Credit Cards', 'Attorney Profile', 'User Password' (selected), 'User Permissions', and 'User Preferences'. The 'User Password' section is titled 'Change password for jacob@ssmlegal.com' and contains three input fields: 'Old Password', 'New Password', and 'New Password Again'. A green 'CHANGE' button is next to the fields. Below the fields is an 'Instructions' link with a blue question mark icon.

User Permissions

This setting allows you to change which users have rights to file on behalf of an attorney.

The screenshot shows the 'User Permissions' section of the 'PROFILE SETTINGS' page. The page has the same blue header and navigation buttons as the previous screenshot. The breadcrumb is 'Profile Settings | Plan Selection'. The main content area is titled 'PROFILE SETTINGS' and shows the 'Filing Attorney' as 'Jacob R Powell'. The sidebar on the left is the same, but 'User Permissions' is now selected. The 'User Permissions' section is titled 'Jacob R Powell's authorized users' and contains a table with columns: 'User's Login Email', 'Filing Rights', 'Account Rights', and a 'REMOVE' button. There are two rows of users: 1. 'jacobrpowell@gmail.com' with 'Yes' for both rights, and 2. 'devin@ssmlegal.com' with 'Yes' for both rights. Below the table is a 'New' row with input fields for 'User's Login Email', 'Filing Rights', and 'Account Rights', and an 'ADD NOW' button. A green 'Save' button is at the bottom of the table. Below the table is an 'Instructions' link with a blue question mark icon.

UserPreferences

This setting allows you to set preferences for your filings, including, default court, case type, client, party roles, document types, etc.

The screenshot shows the JudicialLink web application interface. At the top, there is a navigation bar with the 'JudicialLink' logo on the left and five buttons: 'Filing', 'Settings', 'Billing', 'Support', and 'Log Out'. Below the navigation bar, the page title is 'Profile Settings | Plan Selection'. The main content area is titled 'PROFILE SETTINGS' and features a dropdown menu for 'Filing Attorney' set to 'Jacob R Powell'. On the left side, there is a sidebar menu with the following items: 'Law Firm Profile', 'Law Firm Attorneys', 'Law Firm Credit Cards', 'Attorney Profile', 'User Password', 'User Permissions', and 'User Preferences' (which is highlighted). The 'User Filing Preferences' section is displayed in a light brown box. It contains the following settings:

- Default Filing Attorney: Jacob R Powell
- New Case: Default Filing Court: 4th District Pl
- New Case: Default Case Type: Miscellaneous
- New Case: Default Client: (None)
- New Case: Default Party Roles: Plaintiff vs. Defendant
- New Case: Default Discovery Tier: Tier 2 (\$50K)
- New Case: Default Document Type: Complaint
- Existing Case: Default Document Type: Motion

A 'SAVE' button is located at the bottom of the 'User Filing Preferences' section.