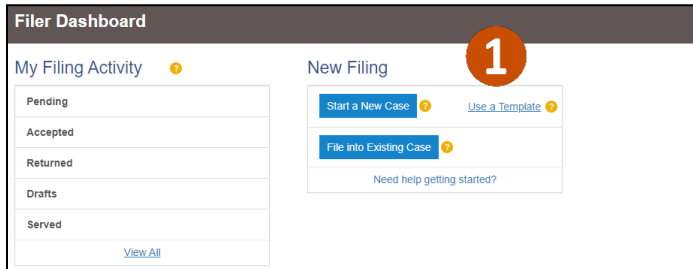


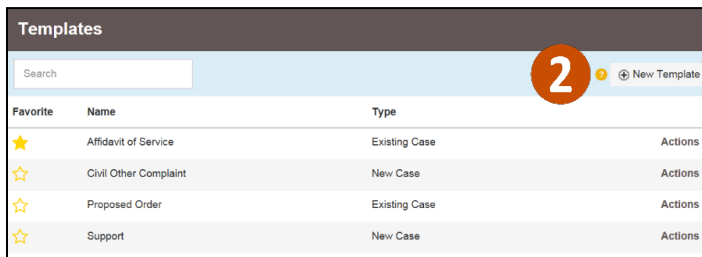
QRG – Creating and Using a Template

Create a new template

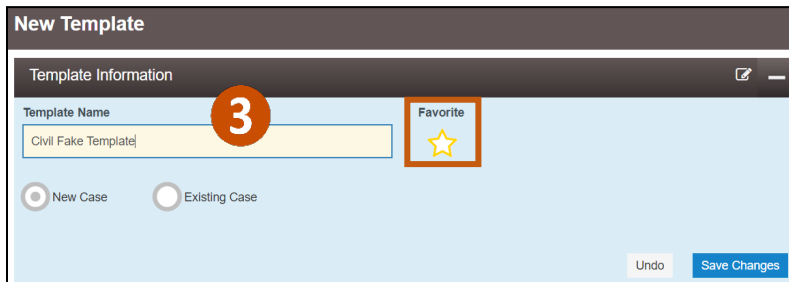
1. Click **Use a Template**.



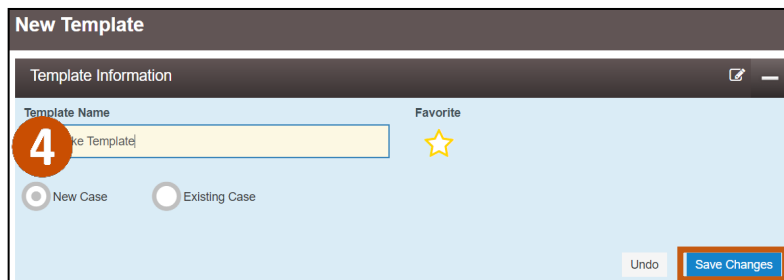
2. Click **New Template**.



3. Enter a **Template Name**. Click the star icon to add as a favorite.

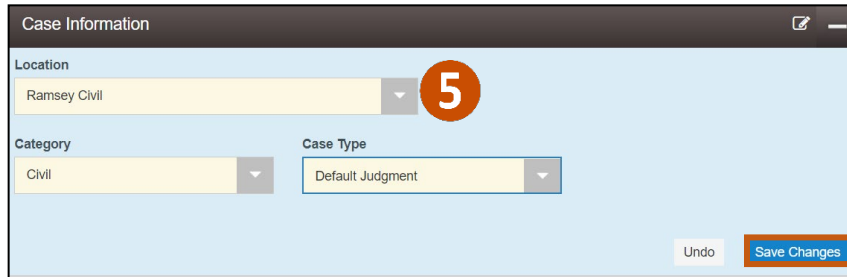


4. Select **New Case** to add a new case template. Click **Save Changes**.



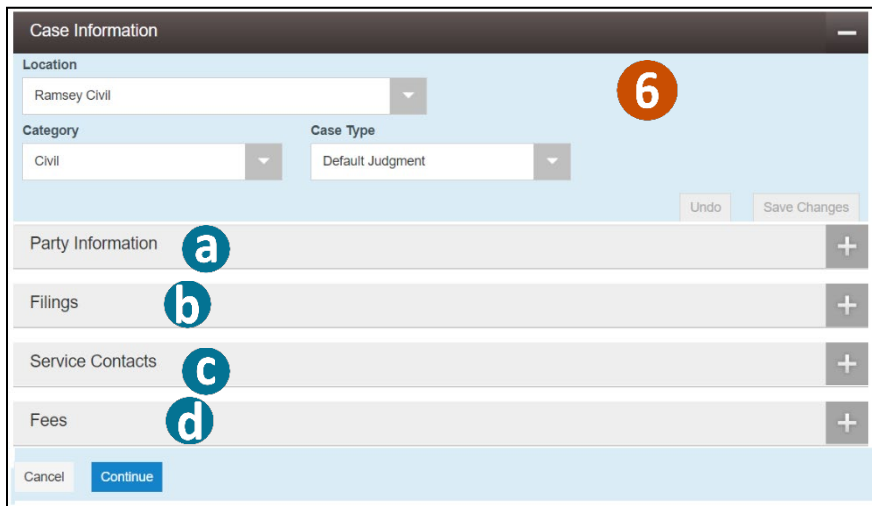
QRG – Creating and Using a Template

5. Select a **Location**, **Category**, and **Case Type** in the Case Information section drop-down lists. Click **Save Changes**.



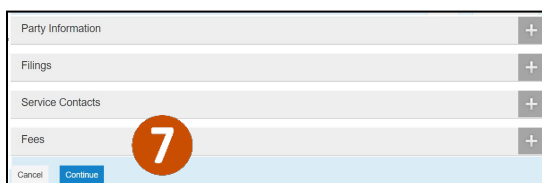
The screenshot shows a 'Case Information' form with three dropdown menus: 'Location' (set to 'Ramsey Civil'), 'Category' (set to 'Civil'), and 'Case Type' (set to 'Default Judgment'). A red circle with the number '5' is positioned over the 'Location' dropdown menu. At the bottom right, there are 'Undo' and 'Save Changes' buttons.

6. Select the information from the remaining sections if applicable:
 - a. **Party Information**
 - b. **Filings**
 - c. **Service Contacts**
 - d. **Fees**



The screenshot shows the 'Case Information' form with the same dropdown menus as in step 5. Below the form are four expandable sections: 'Party Information', 'Filings', 'Service Contacts', and 'Fees'. Each section has a plus sign on the right. A red circle with the number '6' is placed over the 'Location' dropdown menu. Letters 'a', 'b', 'c', and 'd' are placed over the section headers. At the bottom, there are 'Cancel' and 'Continue' buttons.

7. Click **Continue**.



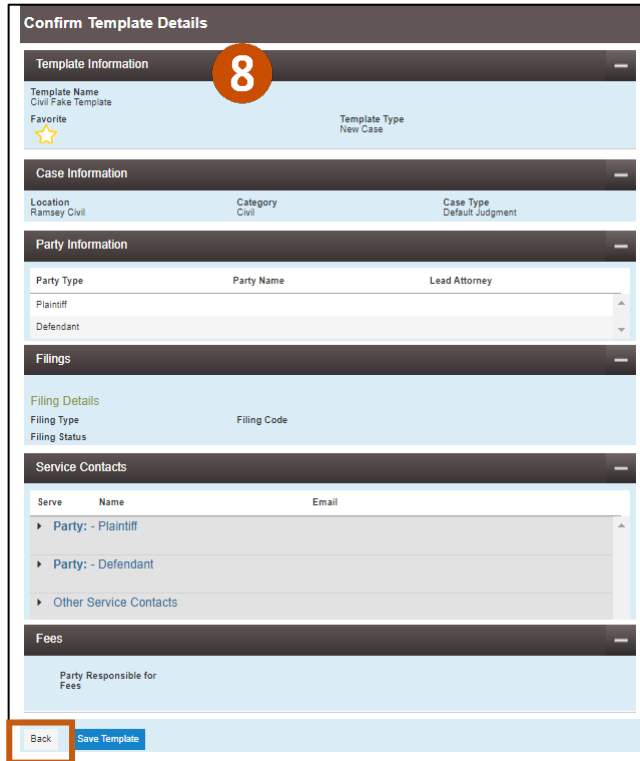
The screenshot shows the four expandable sections from the previous step. A red circle with the number '7' is placed over the 'Fees' section header. At the bottom, there are 'Cancel' and 'Continue' buttons.



Template information (template name and new or existing case) and case location are the only required fields.

QRG – Creating and Using a Template

- Review each section for accuracy. Click **Back** to make edits to the template if necessary.



Confirm Template Details

Template Information

Template Name: Civil Fake Template
 Favorite:
 Template Type: New Case

Case Information

Location: Ramsey Civil | Category: Civil | Case Type: Default Judgment

Party Information

Party Type: Plaintiff | Party Name: | Lead Attorney: |
 Defendant: |

Filings

Filing Details
 Filing Type: | Filing Code: |
 Filing Status: |

Service Contacts

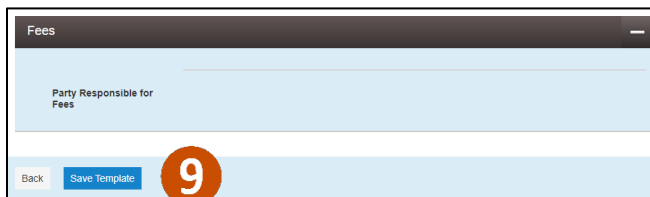
Serve	Name	Email
▶	Party: - Plaintiff	
▶	Party: - Defendant	
▶	Other Service Contacts	

Fees

Party Responsible for Fees: |

Back Save Template

- Click **Save Template**.



Fees

Party Responsible for Fees: |

Back Save Template

- The Success notification will display on the upper right side of the template screen. The template saves to the eFile and eServe template library.



Success
 Template saved successfully

Templates

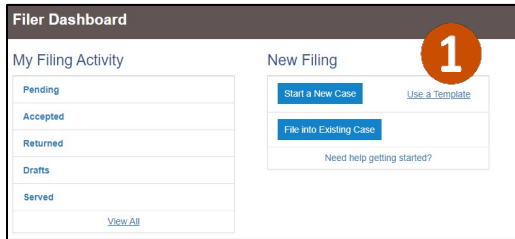
Search: |

Favorite	Name	Type	Actions
★	Civil Fake Template	New Case	Actions
★	Adoption Initiation	New Case	Actions
★	Affidavit - test	New Case	Actions

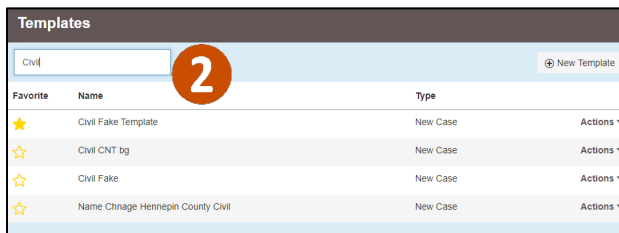
QRG – Creating and Using a Template

Use a template on a new case

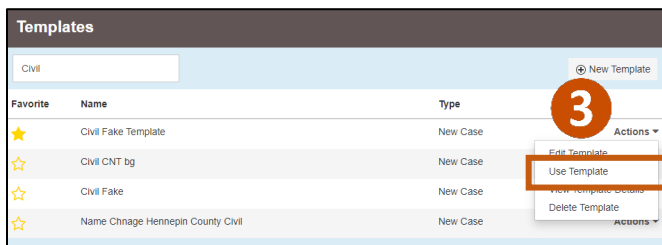
1. Click **Use a Template**.



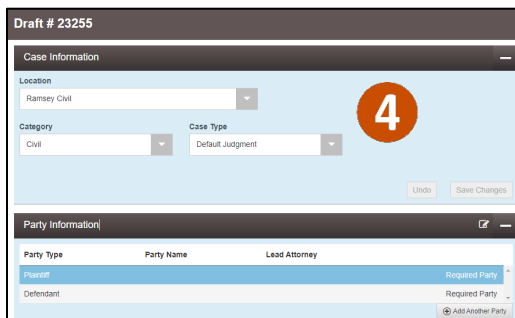
2. Locate the template on the list or type the **Name** of the template in the search field. If the name of the template is unknown, search “new case” to narrow options.



3. Click **Actions** and choose **Use Template** from the drop-down list.



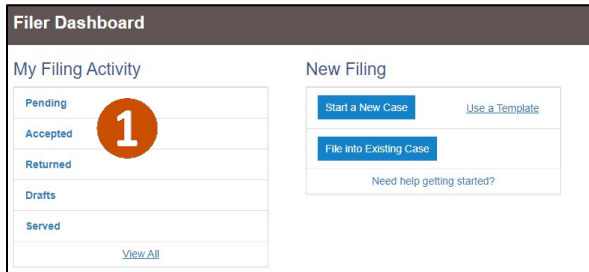
4. A new case filing draft envelope will be created and pre-filled with the selected template information. Complete all the remaining filing information and file the new case.



QRG – Creating and Using a Template

Use a template on an existing case

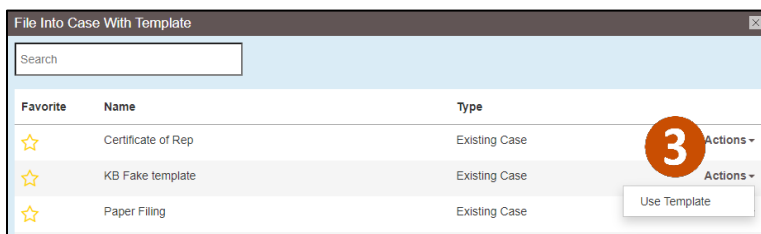
1. Locate the case from one of the folders on the **Filer Dashboard**.



2. Click **Actions** then **File into Case With Template**.



3. Type the **Name** of the template in the search field. If the name of the template is unknown, search “Existing case” to narrow options. Across from the template click **Actions** then **Use Template**.



4. An Existing case filing envelope will be created and pre-filled with the selected template information. Complete all the remaining filing information and file the new case.

