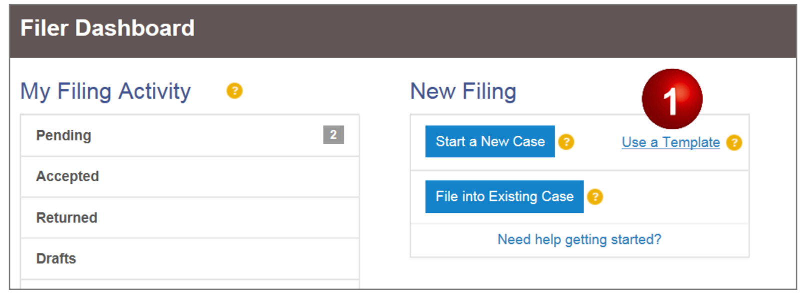
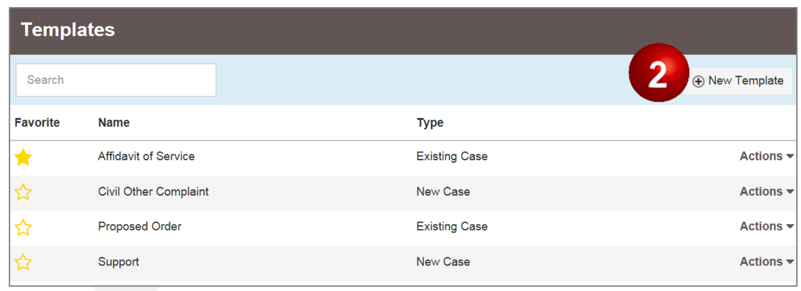
Creating and Using Templates

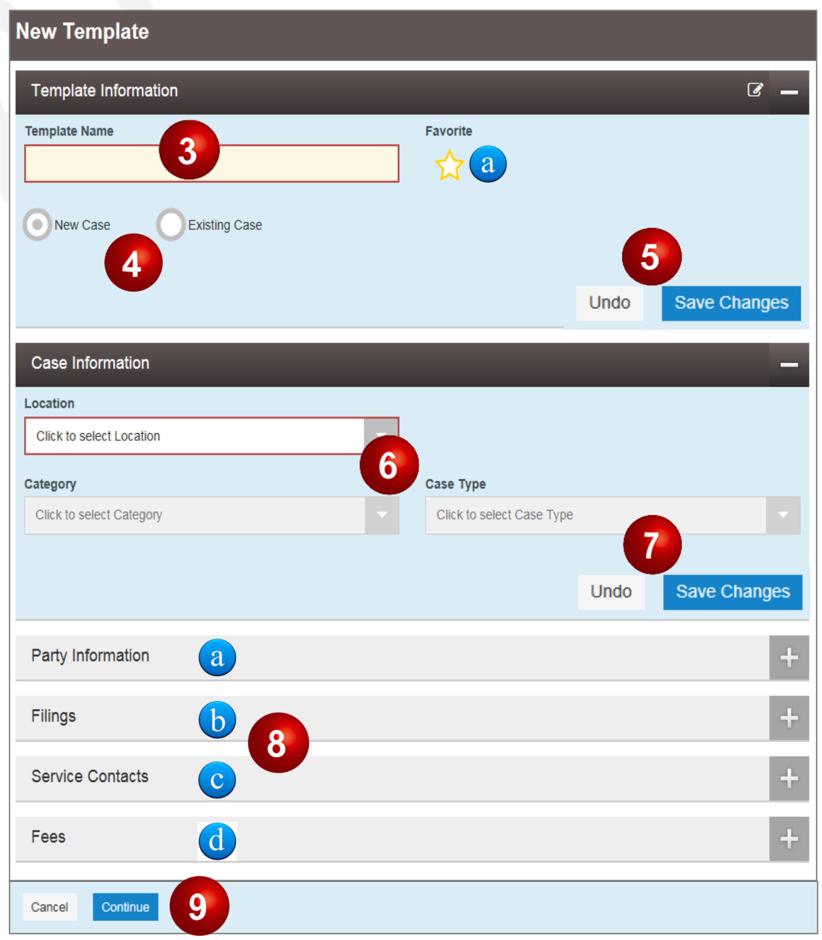
Create a new template

1. Click **Use a Template**.
2. Click **New Template**.
3. Enter a **Template Name**.
    a. Click the **Star icon** to add as a favorite.
4. Select **New Case** to add a new case initiation template or **Existing Case** to add a subsequent case filings template.
5. Click **Save Changes** to continue.
6. Select a **Location, Category** and **Case Type** from the drop-down lists.
7. Click **Save Changes** to continue.
8. As applicable, select the information from the remaining sections:
    a. Party Information
    b. Filings
    c. Service Contacts.
    d. Fees
9. Click **Continue** to confirm template details.

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

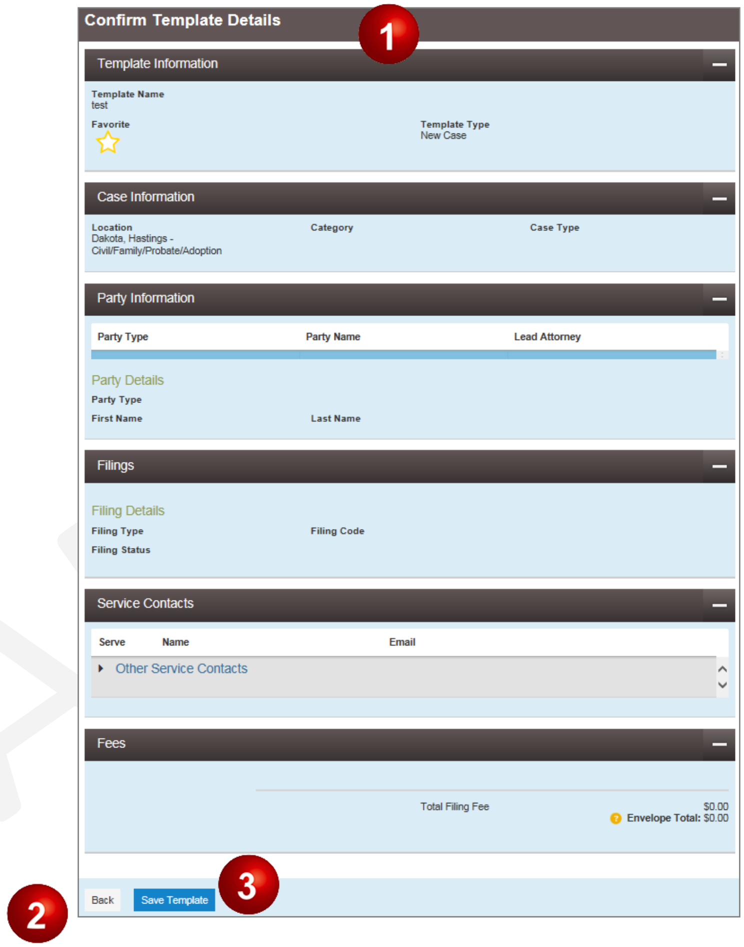




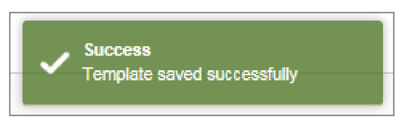


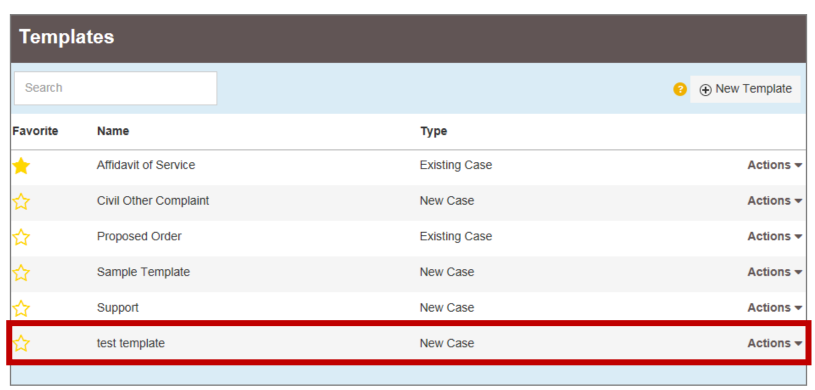
Confirm and save a new template

1. Review each section for accuracy.
2. Click **Back** to make edits to the template, if necessary.
3. Click **Save Template**.



The Success notification will appear in the upper-right side of the Templates screen.





Use a template

1. Click **Use a Template**

OR

1. Select **Templates** from the **Actions** drop-down list.
2. 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.

A new case filing draft envelope will be created and pre-filled with the selected template information.

4. Complete all remaining filing information necessary to file a new case.