

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.

Filer Dashboard

My Filing Activity ?

Pending	2
Accepted	
Returned	
Drafts	

New Filing 1

Start a New Case ? Use a Template ?

File into Existing Case ?

Need help getting started?

Templates

Search 2 + New Template

Favorite	Name	Type	Actions
★	Affidavit of Service	Existing Case	Actions
★	Civil Other Complaint	New Case	Actions
★	Proposed Order	Existing Case	Actions
★	Support	New Case	Actions

New Template

Template Information ✎ —

Template Name 3 Favorite ★ a

New Case 4 Existing Case 5

Undo Save Changes

Case Information —

Location 6
Click to select Location

Category 6 Case Type 7
Click to select Category Click to select Case Type

Undo Save Changes

Party Information a +

Filings b 8 +

Service Contacts c +

Fees d +

Cancel Continue 9

Creating and Using Templates

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 screenshot shows the 'Confirm Template Details' form with the following sections:

- Template Information:** Template Name (test), Favorite (star icon), Template Type (New Case).
- Case Information:** Location (Dakota, Hastings - Civil/Family/Probate/Adoption), Category, Case Type.
- Party Information:** Party Type, Party Name, Lead Attorney.
- Party Details:** Party Type, First Name, Last Name.
- Filings:** Filing Details (Filing Type, Filing Status, Filing Code).
- Service Contacts:** Table with columns: Serve, Name, Email. Includes a dropdown for 'Other Service Contacts'.
- Fees:** Total Filing Fee, Envelope Total: \$0.00.

Callouts: 1 points to the form title, 2 points to the 'Back' button, and 3 points to the 'Save Template' button.

DRAFT



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



Templates			
Search		New Template	
Favorite	Name	Type	
★	Affidavit of Service	Existing Case	Actions
☆	Civil Other Complaint	New Case	Actions
☆	Proposed Order	Existing Case	Actions
☆	Sample Template	New Case	Actions
☆	Support	New Case	Actions
☆	test template	New Case	Actions

Creating and Using Templates

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.

