re:Search® Court User Guide

Release 2019.2

Copyright and Confidentiality

Publishing History

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Tyler Technologies Technical Support Contact Information

For assistance, contact Tyler Technologies through the following resources.

Resource	Contact Information
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technologies

1 About re:Search

Topics covered in this chapter

re:Search® is a secure web portal that allows judges, court clerks, and other registered users access to court records and documents across all state jurisdictions that support e-filing.

As a court user, you can use re:Search to perform the following tasks:

- Look up cases, filings, and parties across state jurisdictions.
- Save frequently used searches.
- Set alerts on cases to receive email notifications of new filings
- Set alerts on parties, attorneys, and judicial officers to receive email notifications when they appear on new or updated cases or filings
- View, download, and print court records and documents.
- Quickly scan the latest filings within your jurisdiction.
- Organize cases into folders for easy access.
- Add, edit, and remove filings and documents on a case (clerk admins only).
- Hide sensitive records and documents from non-privileged users (clerk admins only).
- Add, replace, and remove an attorney on a case (clerk admins only).

Because re:Search is a browser-based application, you can access it from any personal computer or smart mobile device.

New Features and Functionality

This section describes new features and functionality that have been added to re:Search since the previous release.

Note: Features and functionality may vary based on your system configuration.

Print View for Cases

To make printing case details easier, re:Search now allows you to display a simplified view of the *Case Details* page that is optimized for printing and sharing. This view is called the print view. The print view has minimal white space, and all entities (parties, filings, hearings, etc.) are displayed in a simple table format.

To display a print view of the *Case Details* page, click the new Print View icon () in the **Case Information** section.

Refer to Case Information Section, page 47, for more information.

Remove All Button Added to Shopping Cart Page

The *Shopping Cart* page now includes a **Remove All** button so that you can remove all items from the shopping cart with one click instead of having to remove each item individually.

Refer to Shopping Cart Page, page 85, for more information.

Share Case Icon Added to Case Details Page and Filing Details Page

re:Search now includes a Share Case icon () in the **Case Information** section on the *Case Details* page and the *Filing Details* page. Clicking this icon opens the *Share Case* dialog box, which allows you to copy a link for the case's *Case Details* page to your clipboard or start an email with the link.

Refer to Case Information Section, page 47, for more information.

Manual Case Tools Removed from Cases in Integrated Locations

For cases in integrated locations, clerk admins no longer have access to the manual case tools used to perform the following tasks from the *Case Details* page and the *Filing Details* page:

- Edit case details.
- Mark cases, parties, and documents as confidential, non-confidential, or sealed.
- Mark filings as confidential or non-confidential.
- Add and remove attorneys.
- Add, edit, and delete filings.
- Add, replace, and delete documents.

This was done because cases in integrated locations should be managed through the court's CMS, not through re:Search. These tools are now available only for cases in non-integrated locations.

Refer to Case Details and Filing Details, page 46, for more information.

Location Added to Case Alert Emails

When you set an alert on a case, re:Search sends you an email whenever someone files into the case or whenever a hearing is scheduled for the case. That email now includes the court location for the case.

Refer to Case Alerts, page 71, for more information.

Filings Section Now Searchable by Document Name and Description

On the *Case Details* page for a case, you can use the **Search in Filings** field to search through the filings attached to the case. Previously, you could only search on filing details, but now you can search for filings using an attached document's name or description.

Refer to Filings and Filing Sections, page 60, for more information.

Searching by Attorney Number

Depending on the page, you can now search for or filter cases or hearings associated with a specific attorney by searching for that attorney's attorney number. Refer to the following sections for more information:

- Search Page, page 28
- Searching for Cases and Filings, page 36
- My Cases
- My Agency's Cases
- My Firm's Cases

- My Hearings
- My Agency's Hearings
- My Firm's Hearings

Frequently Asked Questions

The *Frequently Asked Questions* page answers frequently asked questions about re:Search. The *Frequently Asked Questions* page is specific to each state and is updated frequently based on feedback from users.

To display the *Frequently Asked Questions* page, click **Frequently Asked Questions** at the bottom of the re:Search window.

Availability of Court Records and Documents

While re:Search may allow you to search for and see case information across the state, cases and documents e-filed before re:Search was implemented in your locations are not available through re:Search.

In addition, the state determines whether court users must purchase documents that are outside their jurisdiction or can access them for free.

For more information, contact your clerk's office.

re:Search Integration with Court's CMS

re:Search provides users with access to case information and documents across the state, and most of that data comes from e-filing through e-filing service providers. Some court locations are integrated with re:Search, which means that re:Search can communicate directly with the court's case management system (CMS).

Integrated Locations

Integrated court locations enjoy several benefits that non-integrated court locations do not, including the following:

- Certain tasks that are performed in the court's CMS are carried over into the re:Search system automatically. These include the following tasks:
  - Creating a new case
  - Changing the status of a case (open or closed)
  - Sealing and expunging a case
  - Updating filings or documents on a case
  - Changing the security level on a case, filing, or document
  - Adding, changing, or removing an attorney on a case
- Cases, filings, and documents that were not e-filed are accessible through re:Search. One example would be when a judge signs an order and that filing is uploaded directly into the court's CMS rather than being e-filed. In an integrated court location, that order can be automatically sent to re:Search so that it will be available to a larger audience.
- When a person requests a document to view, re:Search fetches that document from the court's CMS, thus ensuring that the person is viewing the most recent version of that document.

Non-Integrated Locations

For court locations/CMS's that are not integrated with re:Search, there are manual tools built into re:Search that enable clerk admins to accomplish the following tasks:

- Marking cases, filings, and documents confidential to limit their visibility to the public
- Editing case information, such as the case number and status
- Adding, editing, and deleting filings
- Adding, replacing, and deleting documents
- Setting, replacing, and removing attorneys
- Adding or changing lead attorneys
- Marking parties Pro Se

Note: These tools are also available to clerk admins in integrated locations but are less likely to be needed because the court's CMS communicates most changes directly to re:Search.

Although these tools have been designed to be as easy to use as possible, they still require additional effort on the part of the clerk. For that reason, Tyler Technologies recommends integrating re:Search into your court location's CMS whenever possible. If you would like to have your court location integrated with re:Search, contact Tyler Technologies customer support. Refer to Tyler Technologies Technical Support Contact Information, page ii for contact information.

Security Levels for Cases, Filings, and Documents

Different levels of security can be assigned to a case, filing, or document to determine who can access them. Security levels are normally assigned by a court clerk using the court's case management system (CMS) or by the state's governing agency. Some security levels can even be assigned by a filer when he or she e-files through the court's eFile service provider. When necessary, clerk admins for re:Search can also mark cases, filings, and documents with the appropriate security level.

Note: The non-confidential, confidential, and sealed security levels are currently supported in re:Search. Your state, however, may not support or recognize all of these security levels, or your state may define them differently than how they are described here. Tyler Technologies configures re:Search to manage the security levels according to how each state defines them.

The security levels are as follows:

Security Level	Description
Non-Confidential	A non-confidential case, filing, or document is available to all users. This is the default security level for most cases and documents.
Confidential	Depending on the state, a confidential case, filing, or document is typically available only to judges and clerks within their respective jurisdictions, an attorney on the case, a self-represented litigant (SRL) on the case, and a party on the case. Court users outside of their respective jurisdictions, non-lead attorneys, and other non-privileged users cannot access a confidential case, filing, or document. In re:Search, a Locked icon ( ) on the *Case Details* page, the *Filing Details* page, and the *Search* page indicates when a case, filing, or document is confidential.
Sealed	Depending on the state, a sealed case or document is typically visible only to judges and clerks within their respective jurisdictions. In re:Search, a Gavel icon ( ) on the *Case Details* page, the *Filing Details* page, and the *Search* page indicates when a case or document is sealed. **Note: At this time, filings cannot be marked as sealed.**
Expunged	A case that has been expunged is one that has been removed from the system by a judge's order. You cannot expunge cases directly in re:Search. Cases must be expunged through the court's CMS or e-filing service provider.

When necessary, clerk admins can manage the security level for a case, filing, or document by using the manual tools built into re:Search. In integrated court locations, however, clerk admins should control the security level by using their court's CMS, not re:Search.

The Locked and Gavel security icons (and) are intended to be helpful visual aids to users. However, if your state determines that these icons are not useful or cause confusion, one or both icons can be hidden from view for specific user roles on a per-state basis. For more information, contact Tyler Technologies customer support.

Security Levels for Parties

Different levels of security can be assigned to a party on a case to determine who can see the party. Security levels are normally assigned by a court clerk using the court's case management system (CMS) or by the state's governing agency.

Note: The non-confidential, confidential, and sealed security levels are currently supported in re:Search. Your state, however, may not support or recognize all of these security levels, or your state may define them differently than how they are described here. Tyler Technologies configures re:Search to manage the security levels according to how each state defines them.

The security levels are as follows:

Security Level	Description
Non-Confidential	A non-confidential party is visible to all users. This is the default security level for most parties.
Confidential	Depending on the state, a confidential party is typically visible only to judges and clerks within their respective jurisdictions, an attorney on the case, a self-represented litigant (SRL) on the case, and a party on the case. Court users outside of their respective jurisdictions, non-lead attorneys, and other non-privileged users cannot see a confidential party. In re:Search, a Locked icon () next to a party on the *Case Details* page indicates that the party is confidential.
Sealed	Depending on the state, a sealed party is typically visible only to judges and clerks within their respective jurisdictions. In re:Search, a Gavel icon () next to a party on the *Case Details* page indicates that the party is sealed.

When necessary, clerk admins can manage the security level for a party by using the manual tools built into re:Search. In integrated court locations, however, clerk admins should control the security level by using their court's CMS, not re:Search.

The Locked and Gavel security icons (and) are intended to be helpful visual aids to users. However, if your state determines that these icons are not useful or cause confusion, one or both icons can be hidden from view for specific user roles on a per-state basis. For more information, contact Tyler Technologies customer support.

re:Search Premium and re:Search Pro

re:Search Premium and re:Search Pro are paid subscription services that give subscribers access to advanced features in re:Search.

Use the *Pricing* page to learn more about the features that come with re:Search Premium and re:Search Pro, review pricing, and start a free trial of either subscription service.

Open the *Pricing* page by clicking the **Pricing** or **Upgrade** link at the top of the re:Search page or by selecting **Upgrade** from the re:Search menu ().

Once you start your free trial, use the *My Account* page to manage your subscription.

Kiosk Mode

re:Search has a feature that allows a clerk admin to designate a computer to act as a kiosk. When kiosk mode is enabled on a computer, anyone can use that computer to access case records through re:Search.

To manage the level of access to case records allowed through the kiosk, the kiosk mode is associated with a specific user account called the kiosk user. As with any re:Search user, the kiosk user account is assigned specific roles that define its desired level of access to case records. Kiosk mode can be enabled on multiple computers using the same kiosk user. In other words, there is no need to create a separate kiosk user for each computer.

Once kiosk mode is enabled on a computer, the following special behaviors apply:

- The computer cannot be used to sign in to another re:Search account.
- The **Sign Out** button is removed from the Profile menu ( ) to prevent users from ending the session.
- The **Change Password** is removed from the Profile menu ( ) to prevent users from changing the kiosk user's password.
- The kiosk user cannot own a subscription to ensures that the kiosk user's access to case records is controlled strictly through the roles that are assigned to it.
- The session time-out function is disabled for kiosk users, so the session will never expire.

2 Getting Started

Topics covered in this chapter

This chapter provides instructions for requesting access to re:Search, signing in and out, and resetting and changing your password.

Requesting Judge Access

To use re:Search as a judge, you must first request access.

To request access:

1. Open your browser, and go to the re:Search website.
2. Click **request access here**.
3. Complete the fields.
4. Click **Submit** or **Request Account**, whichever is shown.

Once your contact information has been validated, you will be granted access and notified by email. Access is typically granted within 48 hours.

Registering and Activating Your Account (New Users)

Before you can use re:Search, you must register and activate your account. When you sign in the first time after you activate your account, you will be asked for some additional information about yourself to complete the registration process.

Note: Tyler configures the registration process to suit the needs of each state. Therefore, the steps, options, and dialog boxes described in this procedure may be different in your state.

Note: If you have an existing eFile™ or File & Serve™ account, you can sign in to re:Search with your eFile or File & Serve account credentials.

To register with re:Search:

1. Open your browser, and then access your state's re:Search website, which is specific to each state.

   The re:Search home page opens.
2. Click **Register** at the top of the page.

The *Register* dialog box opens.

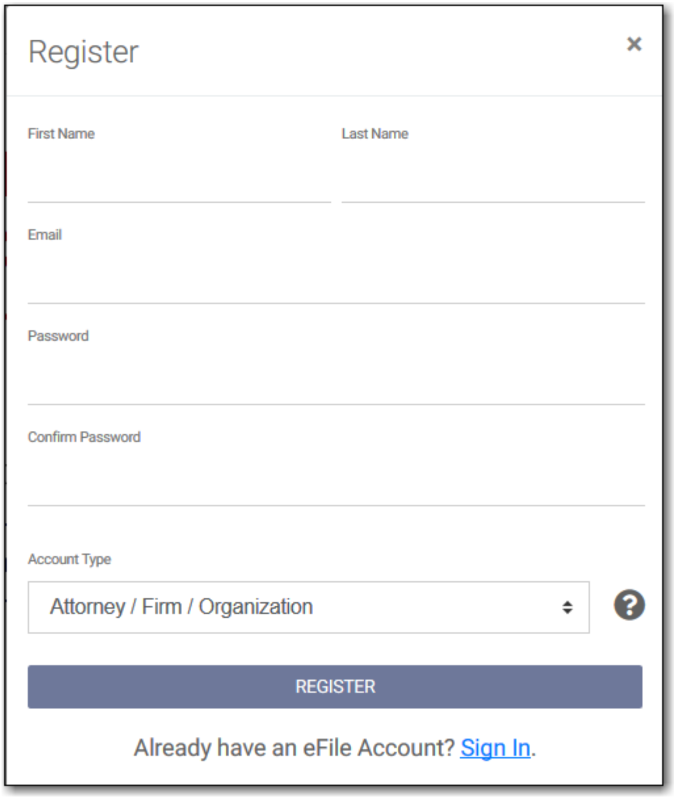


Figure 2.1 – Register Dialog Box

3. Type your name, email address, and password in the fields provided.
4. Select your account type from the **Account Type** drop-down list.

Account Type	Description
Attorney / Firm / Organization	Select this option if you are one of the following: • An attorney in private practice or a member of the attorney's staff • An attorney or employee of a law firm or organization **Note: As an attorney, you must be licensed and in good standing with your state.**
Self-Represented Litigant / Pro Se	Select this option if you are a self-represented litigant on a case. **Note: A self-represented litigant (also called a Pro Se party) is a party on a case who has chosen to represent himself or herself instead of using an attorney.**
General Public	Select this option if you are a member of the general public.

Note: The account types described here are typical but may be different in your state. Your state determines the account types that re:Search supports.

5. Click **Register**.

re:Search creates your account and sends you a confirmation email.

6. Open your confirmation email, and click the **Activate Account** link.

   After you click the **Activate Account** link, re:Search opens a new browser tab and displays an *Account Activated* dialog box.

7. Click **Sign In**.

   The *Sign In* page opens.

8. Type your email address and password in the fields provided, and then click **Sign In**.

   The *Contact Information* page opens, and then a *Terms and Conditions* dialog box immediately opens on top of it.

9. Click **Continue** on the *Terms and Conditions* dialog box to close it.

   The *Contact Information* page is displayed. As shown in the following figure, this page varies based on the account type that you selected in Step 4.

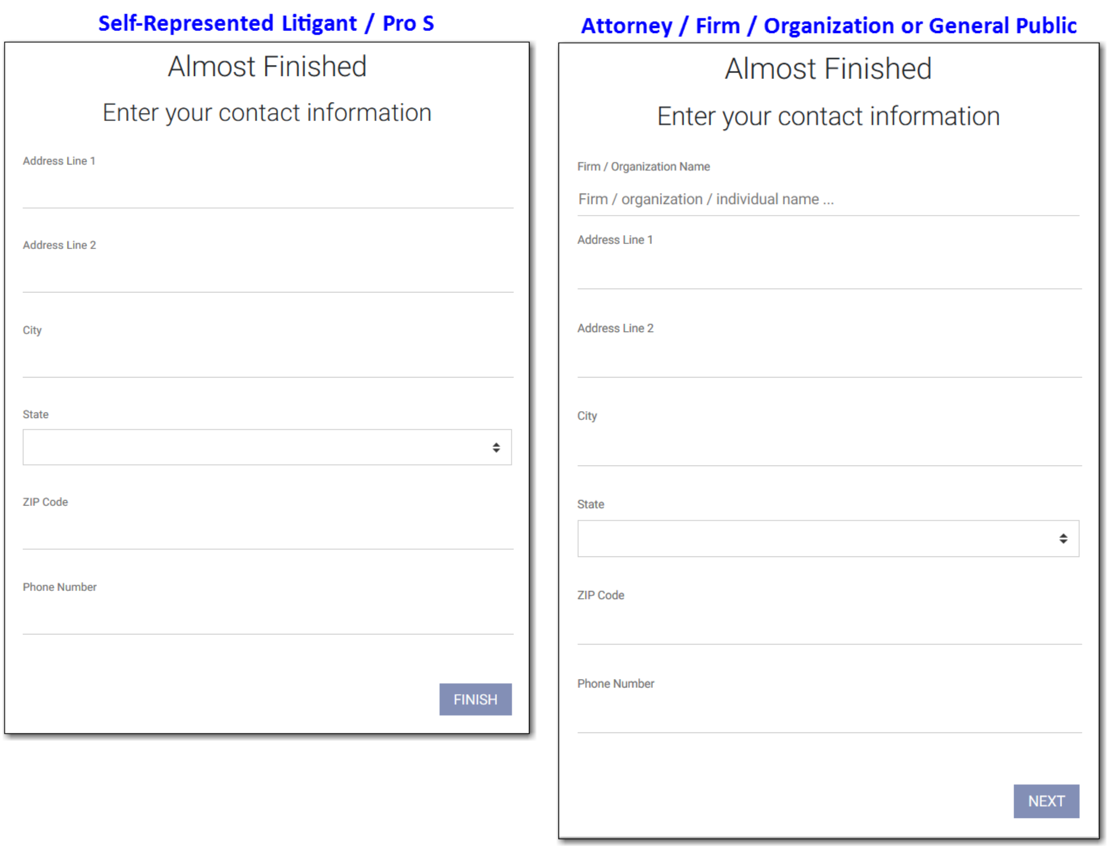


Figure 2.2 – Contact Information Page

10. Complete the fields on the *Contact Information* page.

11. Do one of the following, depending on which button is displayed at the bottom of the *Contact Information* page:

    - Click **Finish**. This completes the registration process. re:Search displays the *Dashboard*, and you can begin using re:Search. Depending on your state and user role, re:Search may display a welcome message with an introduction to re:Search and a brief description of what you can do in re:Search.
    - Click **Next** to continue with the registration process. re:Search displays a list of roles and asks you to select the role that best describes you. Continue with the next step.

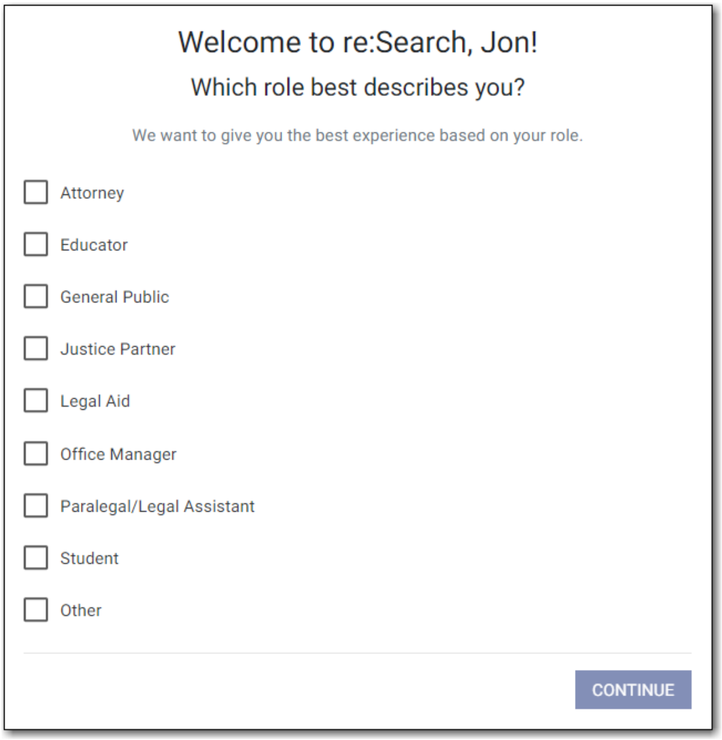


Figure 2.3 – Role Selection Dialog Box

12. Select the check box for the role that best describes you. You can select more than one role.
13. If you select the **Attorney** role, re:Search displays additional practice areas. Select one or more of these practice areas.

14. Click **Continue**.

    Depending on the role you selected, the following results occur:

    - If you selected any role other than the **Attorney** role, you have completed the registration process. re:Search displays the *Dashboard*, and you can begin using re:Search. Depending on your state and user role, re:Search may display a welcome message with an introduction to re: Search and a brief description of what you can do in re:Search.
    - If you selected the **Attorney** role, re:Search asks if you want privileged access to your cases. Continue with the next step.

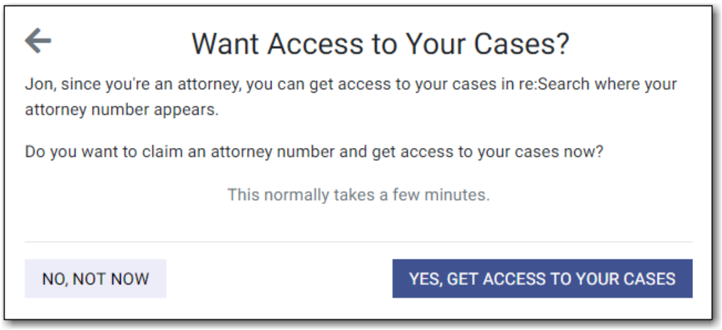


Figure 2.4 – Want Access to Your Cases? Dialog Box

15. Do one of the following:

    - If you do not want to claim your attorney number to get privileged access to your cases (you can always do this later), click **No, Not Now**. re:Search then displays the *Dashboard*, and you can begin using re:Search. You have completed the registration process. Depending on your state and user role, re:Search may display a welcome message with an introduction to re:Search and a brief description of what you can do in re:Search.
    - If you want privileged access to your cases now, click **Yes, Get Access to Your Cases**. re: Search next asks you to select your name from the list of attorneys provided by your state. Continue with the next step.

16. Enter your name or attorney number in the **Search by Name or Attorney Number** field, and then click **Search**.

    re:Search looks for your name or attorney number in the list of active attorneys provided by your state and displays the name, firm (if available), and attorney number for each possible match. If there are a lot of matches, use the **Next** and **Prev** buttons to locate your name in the search results.

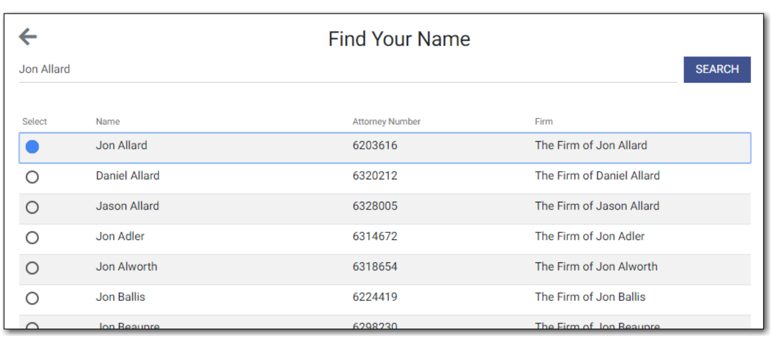


Figure 2.5 – Name Found After Entering Attorney Number on the Find Your Name Dialog Box

17. Click your name to select it, and then click **Next**.

The *Confirm You Are This Attorney* page opens. This page prompts you to send a confirmation email to the email address on record to confirm that you are the selected attorney.

Note: The email address on record is provided by your state. It is not necessarily the email address that you provided earlier in this procedure.

18. Click **Send Confirmation Email**.

    re:Search displays a confirmation message, which states that a confirmation email has been sent to the email address that you have on file with your state.

19. When you receive the confirmation email, open it and click the link provided.

    Your attorney account with re:Search is now confirmed, and the re:Search *Dashboard* is displayed. You are already signed in and can begin using re:Search. Depending on your state and user role, re:Search may display a welcome message with an introduction to re:Search and a brief description of what you can do in re:Search.

Signing In

To access the re:Search website, you must first sign in. If you have an existing eFile account, you can sign in to re:Search with your eFile account credentials.

To sign in:

1. Open your browser, and access your state's re:Search website.

   Note: The website address is specific to each state.

   The re:Search home page opens.

2. Click **Sign In**.

   The *Sign In* page opens.

3. Type your email address in the **Email** field.
4. Type your password in the **Password** field.

   Note: If you forget your password, click Forgot Password? to reset your password.

5. Click **Sign In**.

Results: If you have signed in before and your account is in good standing, the *re:Search* window opens. By default, the first page that is displayed is the *Dashboard*.

Signing Out

When you are not actively using re:Search, it is recommended that you properly sign out to prevent unauthorized use of your account.

To sign out:

1. On the omnibar at the top of the *re:Search* window, click the Profile menu (MC).
2. Click **Sign Out**.

Changing Your Password

You can change your password at any time.

To change your password:

1. On the omnibar at the top of the *re:Search* window, click the Profile menu (MC).
2. Click **Change Password**.

   Note: If you are signed in to re:Search with your Odyssey® File & Serve™ or eFile account, you are prompted to access that application to change your password.

   The *Change Your Password* dialog box opens.
3. Type your new password in the **Password** field.
4. Retype your new password in the **Confirm Password** field.
5. Click **Change Password**.

   A confirmation screen displays the following message:

   `Your password has been changed successfully.`

Resetting Your Password

If you have forgotten your password, you can reset your password by clicking the **Forgot Password?** link on the sign-in page.

Before you begin:

- Ensure that you know the email address that you provided during the registration process.
- Ensure that the Caps Lock setting is not on. Your password is case-sensitive.

To reset your password:

1. Open your browser, and go to the re:Search website.
2. Click **Sign In**.

   The sign-in page opens.
3. Click **Forgot Password?**.

   The *Reset Password* page opens.
4. Type the email address you provided during the registration process in the **Email Address** field, and then click **Next**.

   Note: If the system is unable to find your email address, an error message is displayed stating that no user is registered with that email address.
5. Select the **I'm not a robot** check box.

   A window opens with a set of images, and you are asked to click specific images to confirm that you are a real person.
6. When you are finished selecting the images, click **Reset Password**.

   If you selected the correct images, the system displays the following message:

```
A password reset link has been sent to the email address associated with your
account. If you do not see the password reset email in your Inbox, please check to
see if it was delivered to your spam folder.
```

7. Open the email, and click the link labeled **click here** to reset your password.

   You are prompted to choose a new password.

8. Type a new password in the **New Password** field.
9. Retype your new password in the **Repeat New Password** field.
10. Click **Change Password**.

    A confirmation screen displays the following message:

    ```
    Your password has been changed successfully.
    ```

Session Timeouts

To reduce the chances of unauthorized access to court records when you leave your workstation or mobile device unattended and unlocked for any reason, your re:Search session will automatically expire if no activity is detected after a set number of hours. The exact time-out period is determined by your state.

Before your session expires, re:Search will display a message with a timer showing how long before your session expires. You can then choose to either sign out immediately or cancel the countdown and continue using re:Search. If you do nothing, you will be signed out automatically when the countdown finishes. To continue using re:Search after your session expires, you will need to sign in again.

Keyboard Navigation

If you prefer to work from a PC (desktop or laptop) and do not like using a mouse or trackpad, you can use a few keys on your keyboard to navigate through re:Search.

Key or Key Combination	Description
TAB	Press TAB to move forward between cards, fields, buttons, menus, and drop-down lists.
SHIFT+TAB	Press SHIFT and TAB together to move backward between cards, fields, buttons, menus, and drop-down lists.
ENTER	Press ENTER to perform the following actions: • Open menus, drop-down lists, and links. • Select options from menus or drop-down lists. • Select buttons.
SPACEBAR	Press SPACEBAR to select options, check boxes, or buttons.

Support Information

If you need assistance or want to learn more about re:Search, the *Support Information* dialog box is a good place to start.

To open the *Support Information* dialog box, select **Support Information** from the re:Search menu (). If you are signed in, you can also click **Support Information** at the bottom of the re:Search window.

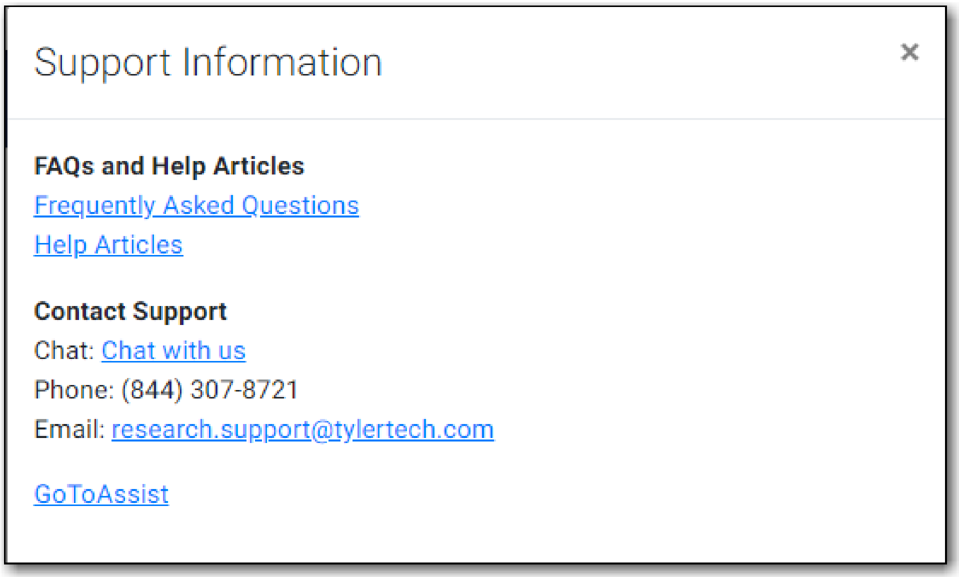


Figure 2.6 – Support Information Dialog Box

The *Support Information* dialog box includes the following information, which varies by state and user role.

Option	Description
Frequently Asked Questions	Click this link to display the *Frequently Asked Questions* page.
Help Articles	Click this link to access Tyler's Self-Service Support website.
Chat	Click this link to start an online chat with a Tyler customer support representative for immediate assistance.
Phone	Call this phone number to talk to a Tyler customer support representative.
Email	Click this link to start an email addressed to Tyler customer support.
GoToAssist	Click this link to use Tyler's GoToAssist tool, which allows a Tyler customer support representative to see and, if necessary, remotely operate your computer. Use this option only if directed to do so by your Tyler customer support representative.

3 re:Search Home Page

Topics covered in this chapter

The re:Search home page is the webpage that you see when you first open the re:Search website in a browser. The home page provides a basic overview of re:Search, including how it works and why you might want to consider using it. From the home page, you can also access additional information about re:Search functionality and features, register as a new user, or sign in to re:Search.

The re:Search home page and website address are specific to each state. The following figure shows part of the re:SearchTX home page.

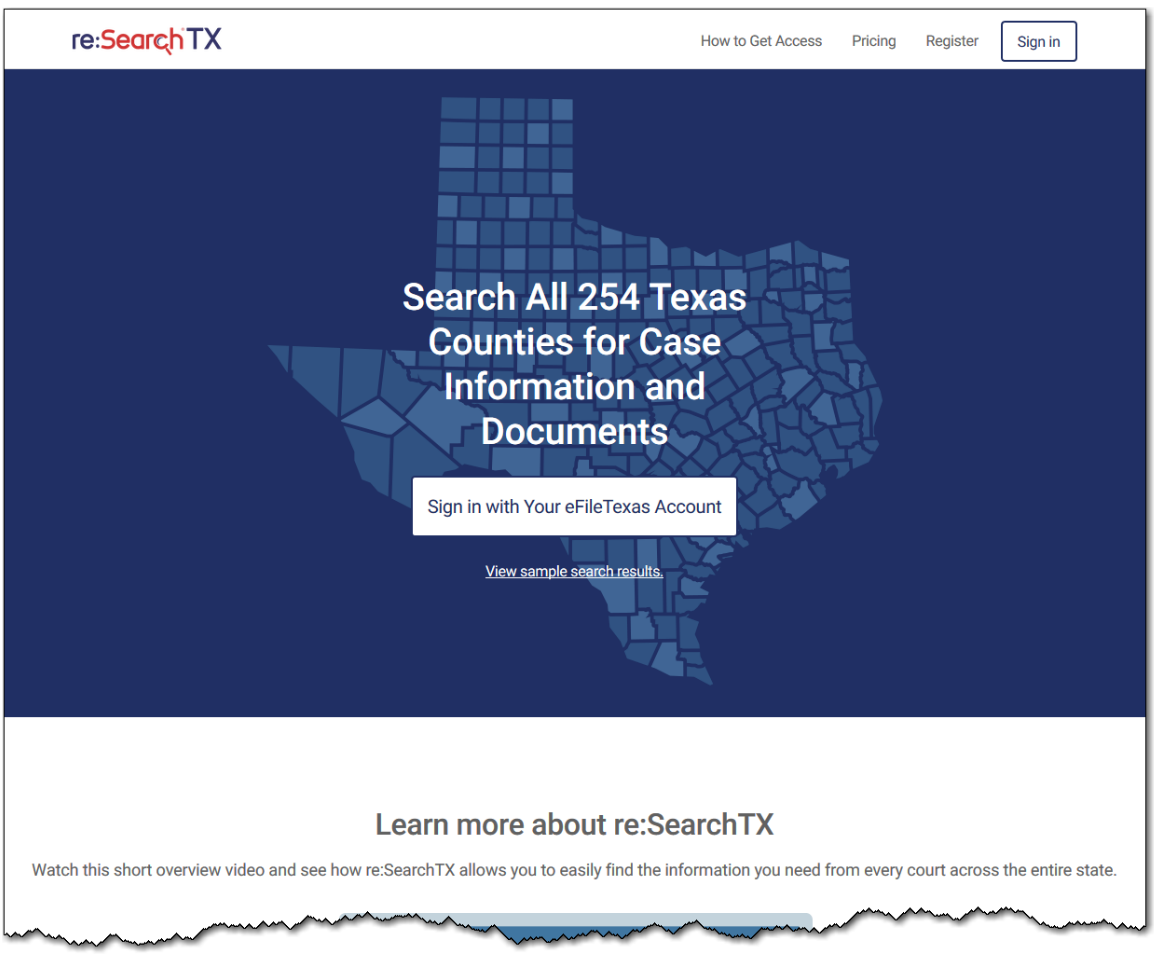


Figure 3.1 – Top Portion of the re:SearchTX Home Page

Home Page Links

You can use the links on the home page to access additional information about re:Search, register as a new user, go to the *Dashboard*, or sign in or out. When you view the home page on a small mobile device or resize your browser to make it smaller, the links along the top of the page move to the menu button (☰) to save room.

Link	Description
Dashboard	If you are already signed in, click this link to display the *Dashboard*. This link is displayed only if you are signed in.
About re:Search	Click this link to display the *About re:Search* page, which provides additional information about re:Search.
How to Get Access	Click this link to display the *How to Get Access* page, which tells you how to register for a new account.
Pricing	Click this link to display the *Pricing* page. From this page, you can learn more about the features that come with re:Search Premium and re:Search Pro and also start your free trial. **Note: If subscription services are not available in your state, the *Pricing* page is not available.**
Register	Click this link to begin the registration process. **Note: Judges follow a different registration process. Refer to the *How to Get Access* page for more information.**
Sign In	If you are already a registered user, click this link to sign in to re:Search. This link is displayed only if you are not signed in.
Sign Out	If you are already signed in, click this link to sign out. This link is displayed only if you are signed in.
Disclaimer	Click this link to read a brief disclaimer regarding your use of re:Search.
Frequently Asked Questions	Click this link to display the *Frequently Asked Questions* page.
Integrated Courts	If integrated courts are available in your state, click this link to display a list of integrated courts. Integrated courts are courts whose case management systems (CMSs) are integrated with re:Search.

For your convenience, some of these links are repeated (with different names) in various places on the home page, the *About re:Search* page, and the *How to Get Access* page. For example, clicking **Get Started** on the home page is the same as clicking **Register** at the top of the home page.

About re:Search Page

The *About re:Search* page describes in detail what re:Search has to offer and how it works with your court's case-management system and eFile or File & Service service provider. If your state supports subscriptions to advanced features, the *About re:Search* page provides brief descriptions of those features.

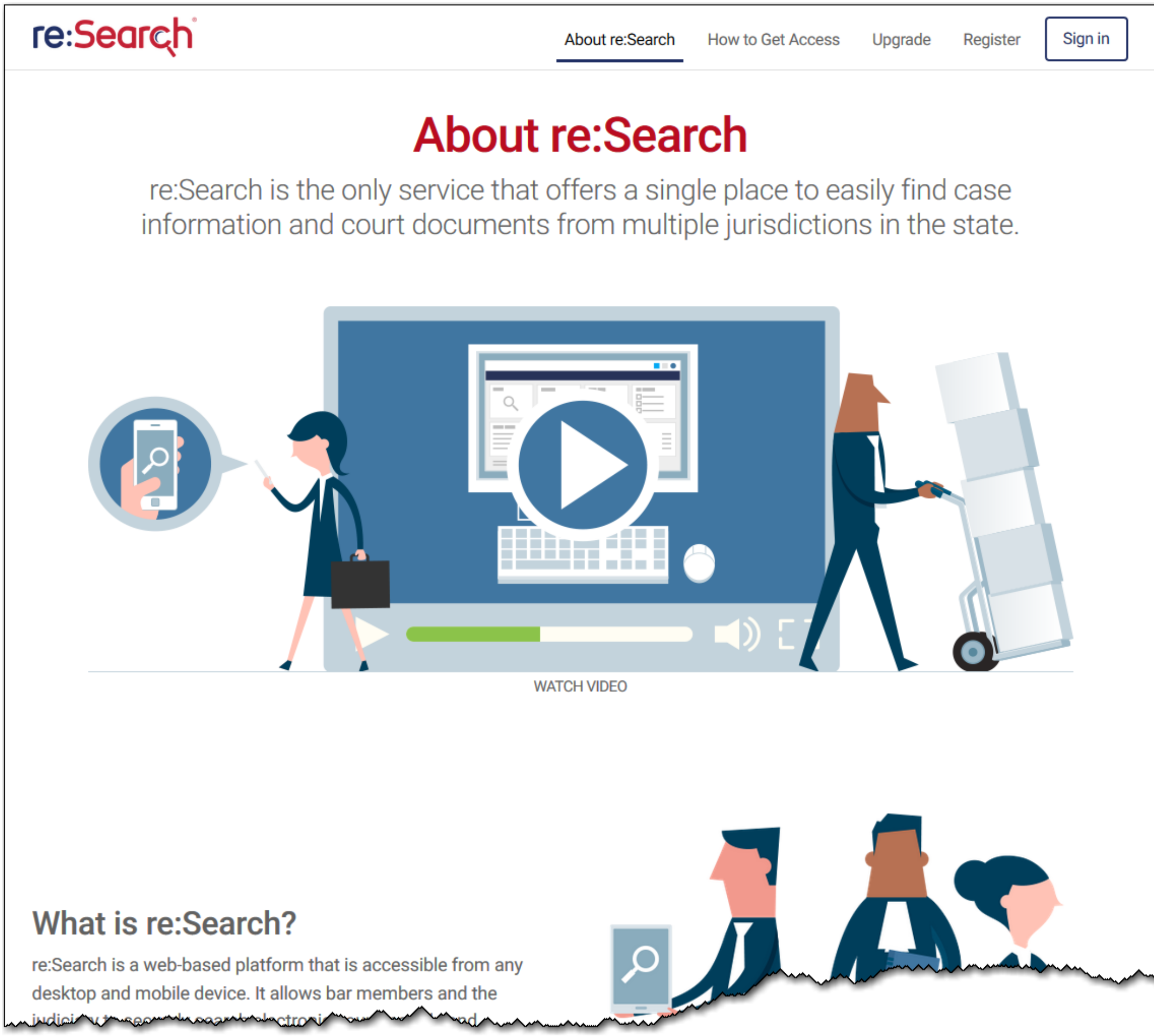


Figure 3.2 – About re:Search Page

How to Get Access Page

The *How to Get Access* page describes the steps that each type of user of re:Search should follow to register for a new account. The information provided on this page varies by state.

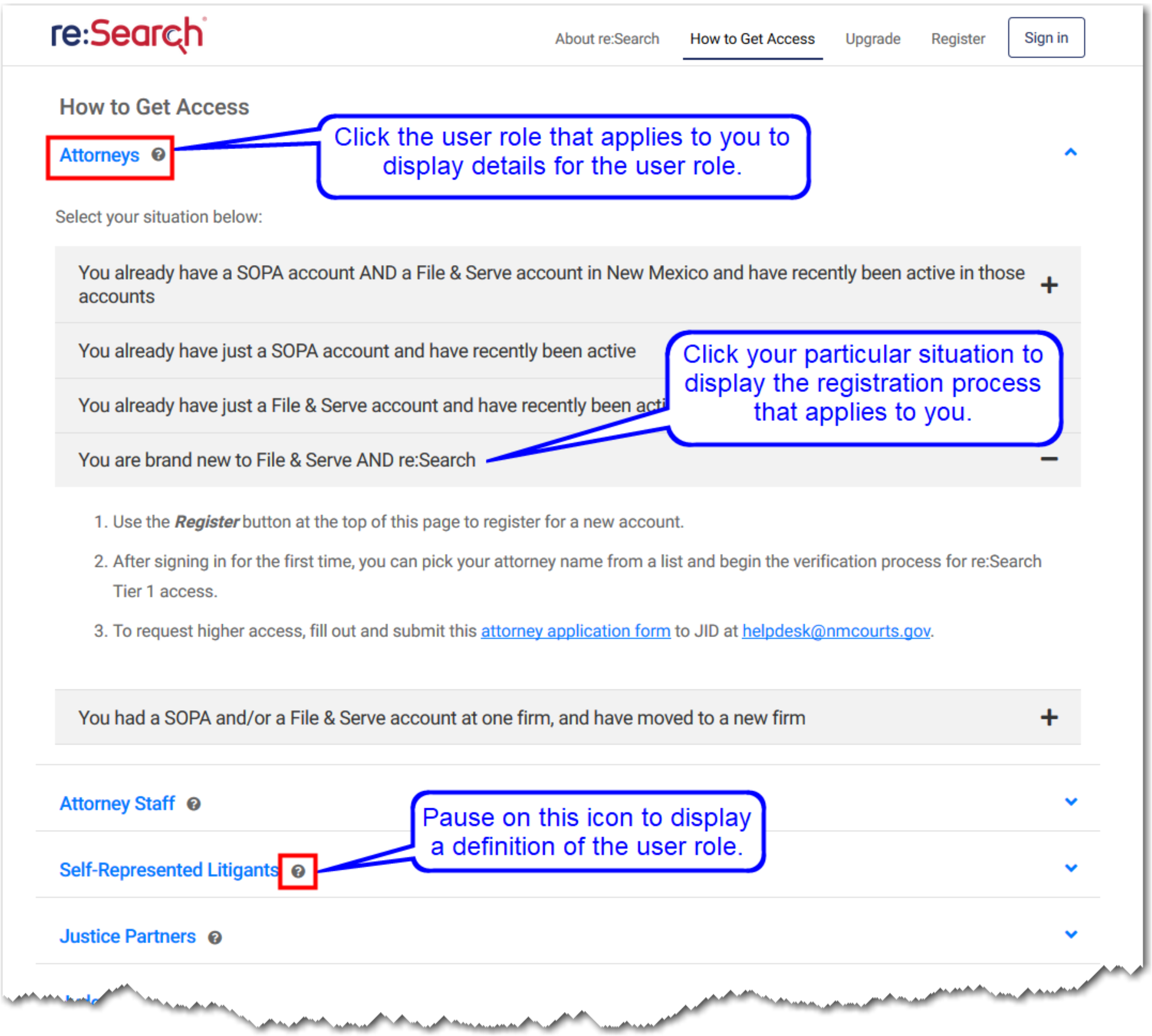


Figure 3.3 – How to Get Access Page

Pricing Page

re:Search Premium and re:Search Pro are paid subscription services that give subscribers access to advanced features in re:Search. Use the *Pricing* page to learn more about the features that come with re:Search Premium and re:Search Pro, review pricing, and start a free trial of either subscription service.If subscription services are not available in your state, the *Pricing* page is not available.

Open the *Pricing* page by clicking the **Pricing** or **Upgrade** link at the top of the re:Search page or by selecting **Upgrade** from the re:Search menu ().

The features, pricing, and trial periods vary by state.

4 Omnibar and re:Search Menu

The omnibar along the top of the *re:Search* window displays the re:Search logo (which also serves as a link to the *Dashboard*) and various menus and buttons. The available options depend on your location and your subscription status. The re:Search menu is displayed on a separate row below the omnibar.

The following screen shot shows the omnibar as it might appear for a user who is subscribed to re:Search Pro.

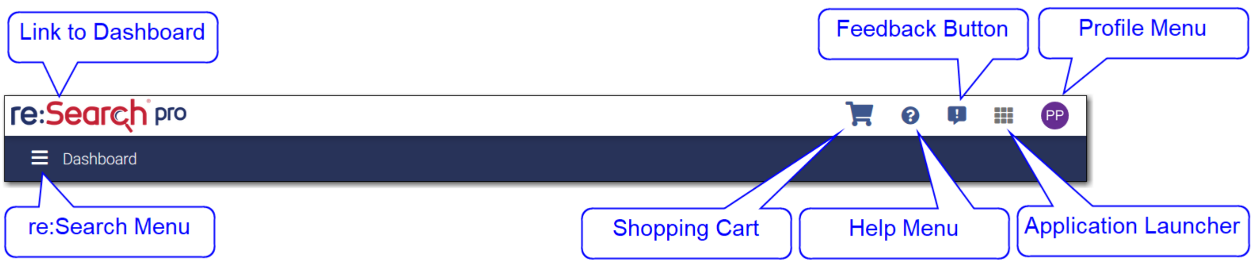


Figure 4.1 – Omnibar Options and re:Search Menu for Subscribers

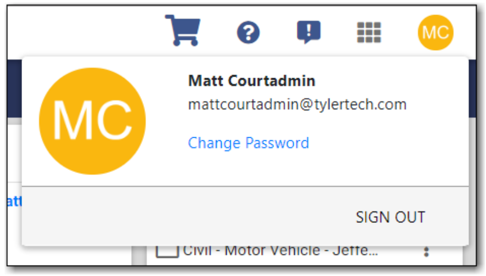
The following screen shot shows the omnibar as it might appear for a user who is not subscribed to re:Search Pro or re:Search Premium.

Figure 4.2 – Omnibar Options and re:Search Menu for Non-Subscribers

The following table describes the re:Search menu and the menus and buttons on the omnibar.

Menus and Icons	Description
re:Search	Click the re:Search logo to display the *Dashboard*. To save room, the logo changes to a smaller logo when you view re:Search on a mobile device or resize your browser window to make it smaller. If you subscribe to re:Search Pro or re:Search Premium, the re:Search logo reflects your subscription status.
3	Click this icon to access the shopping cart. The circled number on the Shopping Cart icon is the number of documents currently in the shopping cart. **Note: The shopping cart is available only in locations that have been configured to allow document purchases.**

Menus and Icons	Description
	Click this button to open the Help menu. The Help menu provides access to the following help options: • **Chat**—Click this option to start an online chat with a Tyler customer support representative for immediate assistance. • **Contact Us**—Click this option to display the *Support Information* dialog box, which contains helpful links, a phone number, and an email address to use when requesting customer support. • **FAQs**—Click this option to display the *Frequently Asked Questions* page. • **Feedback**—Click this option to provide feedback to Tyler Technologies. This option appears on the Help menu only when you view re:Search on a mobile device. Otherwise, the Feedback button () is displayed directly on the omnibar. • **GoToAssist**—Click this option to use Tyler's GoToAssist tool, which allows a Tyler customer support representative to see and, if necessary, remotely operate your computer. Use this option only if directed to do so by your Tyler customer support representative. • **Help Articles**—Click this option to access Tyler's Self-Service Support website.
	Click this button to provide feedback to Tyler Technologies. When you view re: Search on a mobile device, the Feedback button moves to the Help menu to save room on the omnibar.
	Click this button to open the Application Launcher, and then click the logo for your eFile™ or File & Serve™ application to open the application in a new browser tab.

Menus and Icons	Description
	Click this button to display the Profile menu. The Profile menu displays your user name and email address, and includes links for changing your password and signing out.  The button for the Profile menu displays your initials and may appear in a different color than the example shown here.
	Click this button to display the re:Search menu. The re:Search menu includes the following options: • **Dashboard**—Opens the *Dashboard*. • **Search**—Opens the *Search* pages. • **Case Alerts**—Opens the *Case Alerts* page. • **Name Alerts**—Opens the *Name Alerts* page. • **Search Alerts**—Opens the *Search Alerts* page. • **Purchases**—Opens the *My Purchases* page. • **Document Sales**—Opens the *Document Sales* page. • **My Account**—Opens the *My Account* page. • **Clerk Admin**—Opens the *Clerk Admin* page (clerk admins only). • **Support Information**—Opens the *Support Information* dialog box. • **Settings**—Opens the *Settings* page (clerk admins only). For most of these options, the name of the currently active page is displayed next to the button, as shown in the following example: 

5 Dashboard

Topics covered in this chapter

♦ Dashboard Cards
♦ Feature Previews

The *Dashboard* provides access to most re:Search functionality. Using the cards displayed on the *Dashboard*, you can review daily activity related to your cases and filings, access recent cases and filings, and search for cases and fillings.

The following figure does not show all available cards.

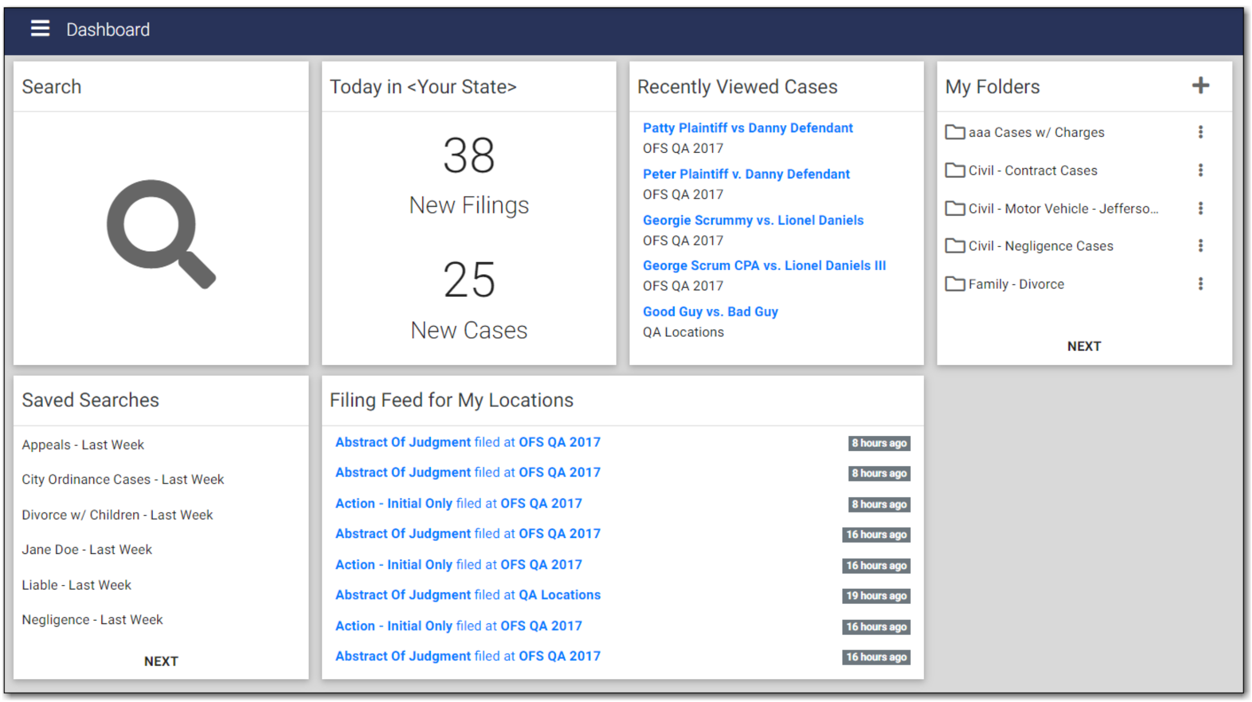


Figure 5.1 – re:Search Dashboard for Court Users

Note: The appearance, position, and relative size of the menu options and cards vary based on the device you are using. For example, on a small mobile device, the cards are arranged vertically and are sized to fit a smaller screen. The screen shot shown here is from a full-sized monitor.

Dashboard Cards

The *Dashboard* comprises a set of cards that display current information and provide access to related functionality.

Card	Description
Search	Click this card to open the *Search* page to begin searching for cases and filings.
Today in <Your State>	This card displays the number of new cases and filings that were added in your state since 12:00 AM midnight (local time). Click the card to open the *Search* page with those cases automatically listed. Note that clicking the **Filings** tab displays all filings, not just the current day's filings.
Recently Viewed Cases	This card displays recently viewed cases for quick access. Click a case to open the *Case Details* page for that case.
My Folders	This card displays the folders that you have created for holding specific cases that you want to access easily. Click a folder to open the folder, click + to create a new folder, or click ⋮ to rename or delete a folder.
Saved Searches	This card displays your previously saved searches. To perform a saved search, click the name of the saved search. The *Search* page will open and display the search results automatically.
Filing Feed for My Locations	This card lists recent e-filing transactions related to cases in your jurisdiction. Click a filing to open the *Filing Details* page for that filing.

Feature Previews

On the *Dashboard*, cards with a blue background, a locked icon next to the name of the card, and the word `Preview` at the bottom of the card are called preview cards. Preview cards provide previews or demonstrations of upcoming features.

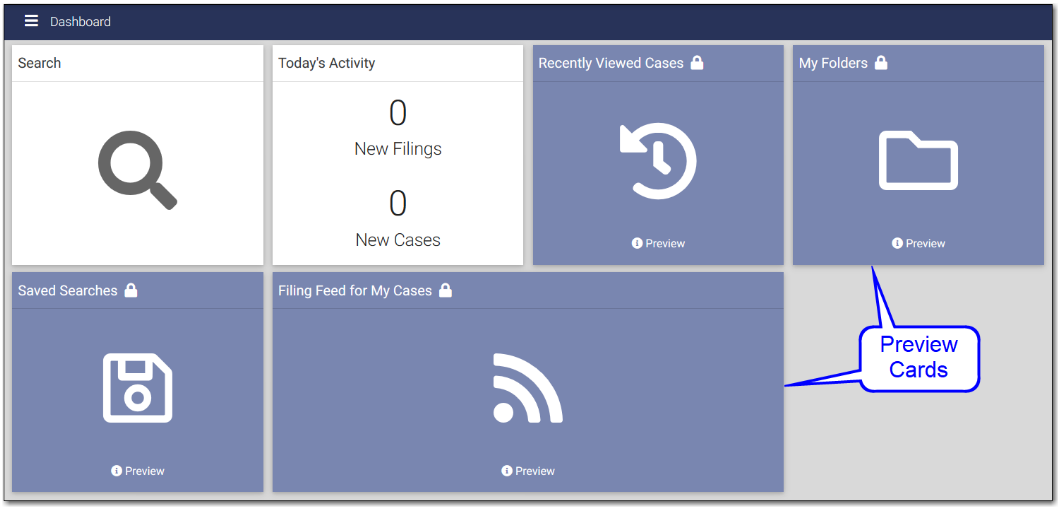


Figure 5.2 – Preview Cards on Dashboard

To preview a feature, click the preview card. A new dialog box opens, and the slide show begins playing.

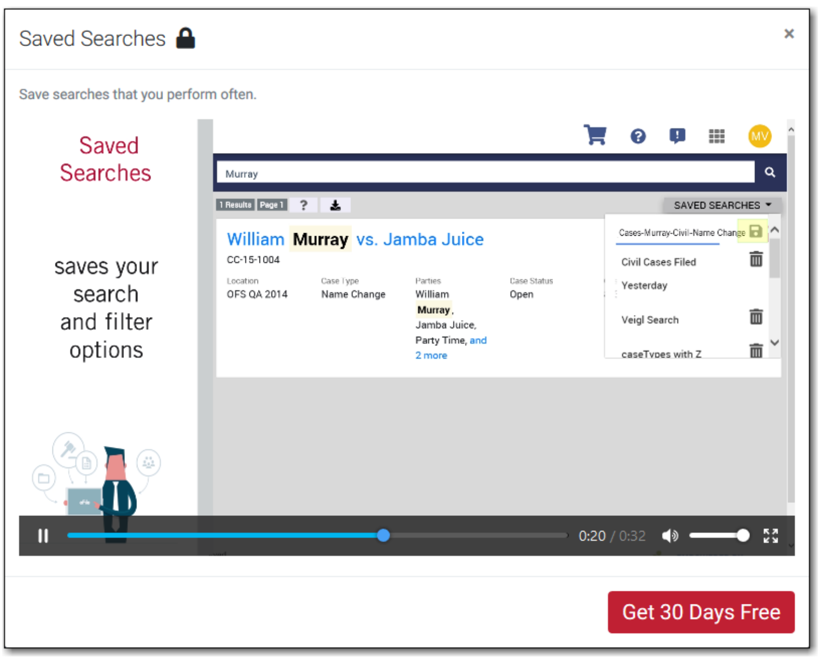


Figure 5.3 – Preview Dialog Box

When you finish watching the preview, either click the **Close** button () to close the dialog box, or click **Get 30 Days Free** to start your free trial subscription.

Note: The actual length of the free trial period may be different in your state.

6 Searching for Cases, Filings, and Documents

Topics covered in this chapter

- ♦ Search Page
- ♦ Searching for Cases and Filings
- ♦ Searching for Documents
- ♦ Saving Searches
- ♦ Applying Saved Searches
- ♦ Deleting Saved Searches
- ♦ Downloading Search Results

Search Page

The *Search* page is where you can perform simple keyword searches, filtered searches, or any combination of the two types of searches to locate cases, filings, or documents.

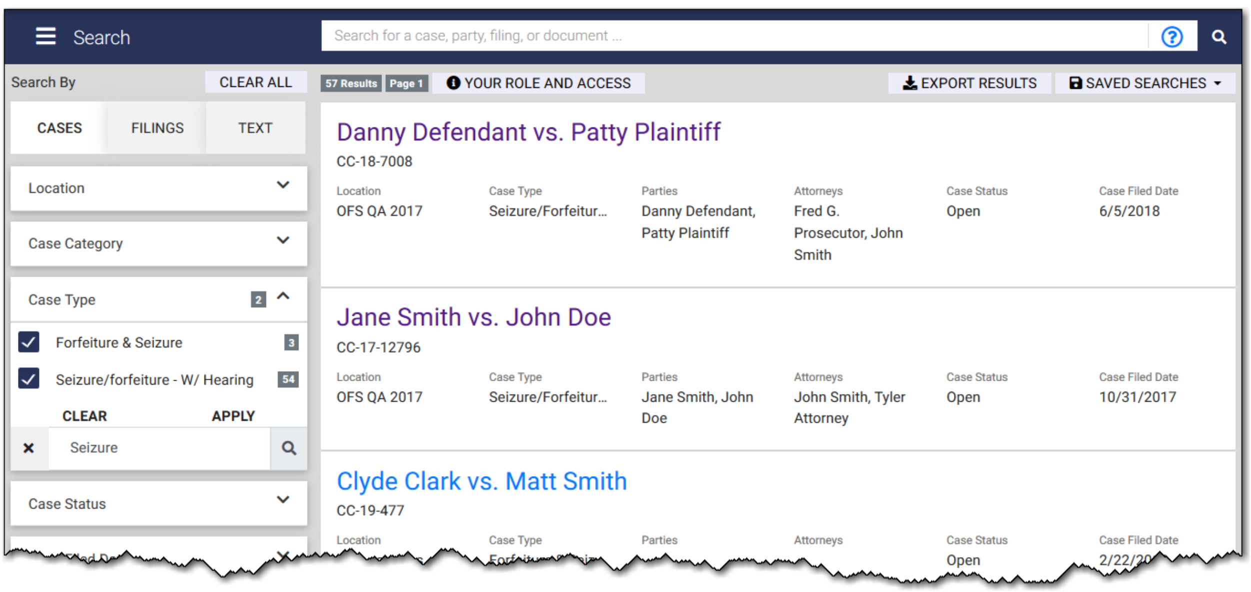


Figure 6.1 – Search Page

Search By Buttons

Use the **Search By** buttons to select the type of search that you want to perform.

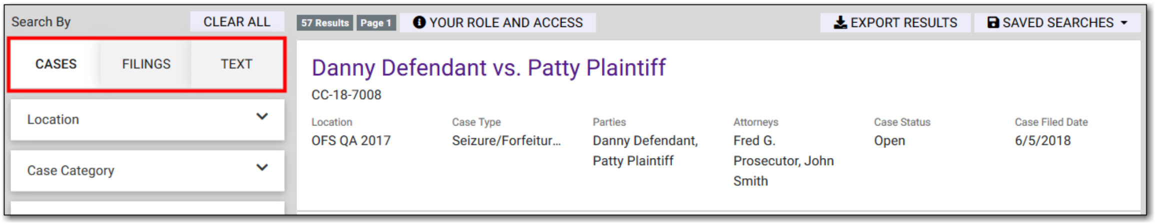


Figure 6.2 – Search By Buttons

Button	Description
Cases	Click **Cases** to search for cases.
Filings	Click **Filings** to search for filings.
Text	Click **Text** to search for text in documents.

Search Field

Use the **Search** field to perform simple keyword searches. Keywords can include any item of information associated with a case, party, attorney, filing, or document, such as a case number, party name, attorney name, attorney number, or location. You can use the **Search** field in conjunction with the filter options. For example, you may want to search for cases for a particular defendant and then use the filter options to narrow the results by location or case type.

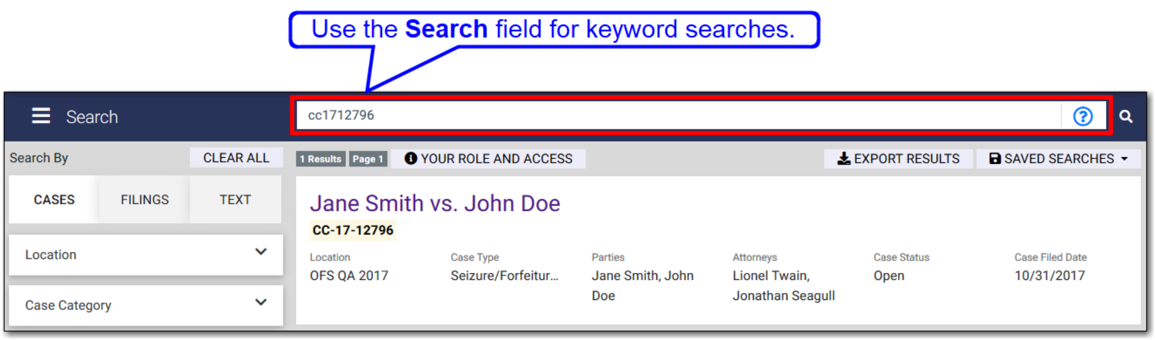


Figure 6.3 – Search Field

Case Numbers with Hyphens (Dashes)

You can search for a specific case by entering the case number in the **Search** field. However, if the case number includes hyphens (also called *dashes*), you may receive too many search results because re:Search will display every case that starts with the same alphanumeric characters. In other words, re:Search treats the hyphens like wildcard characters.

If you want re:Search to display search results that match the case number exactly, you have two options.

Option	Description
Enclose the case number in quotation marks	As described in the next section, when you enclose keywords (including case numbers) in quotation marks, the search results must contain exact matches. Example: `"CC-18-5512-001"`
Omit the hyphens	When you omit the hyphens from a case number, re:Search will display only exact matches in the search results. Example: `CC185512001`

Search Operators

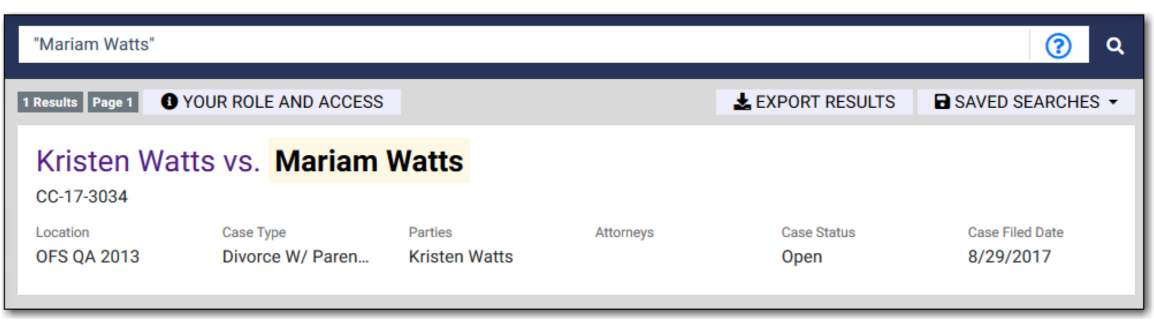
The **Search** field supports the following search operators.

Operator	Example	Description
" "	"CC-18-5512-001"	The results must contain exact matches.
AND	probate AND will	The results must contain both “probate” and “will.”
OR	affidavit OR testimony	The results must contain either “affidavit” or “testimony,” but not both.
NOT	civil NOT probate	The results must contain “civil,” but not “probate.”
*	Jon*	Use an asterisk (*) as a wildcard at the end of a search term. In this example, use “Jon*” to search for “Jon,” “Jonathon,” or “Jonathan.”
“ “~n	“pay structure”~2	Find matches that have “pay” and “structure” no more than two words apart. You must specify at least two keywords in quotation marks.

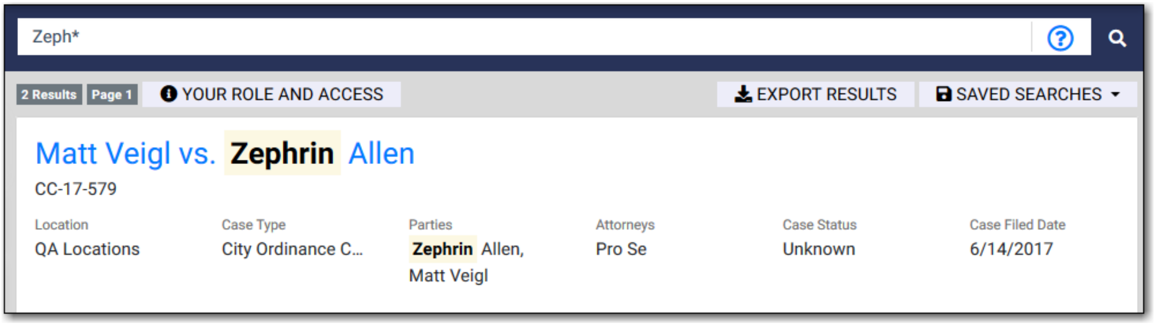
Note: Click the Search Help icon (?) to display a list of search operators.

Examples

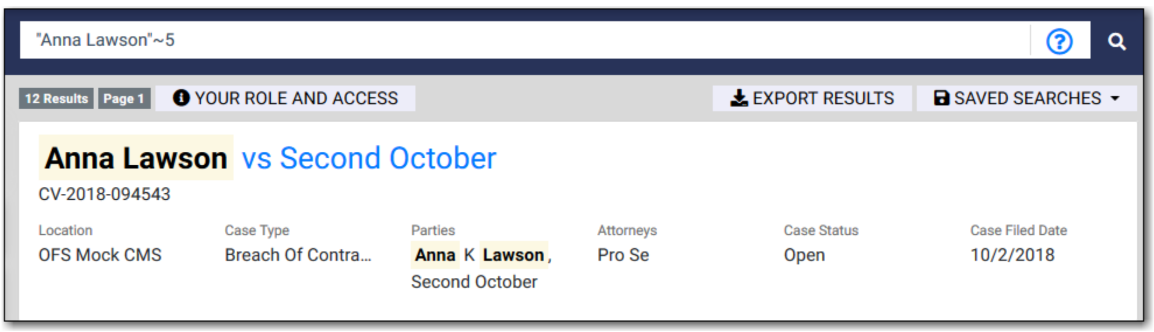
If you want to search for an exact name, type the name in quotation marks, as shown in the following example:



If you know only part of a name, use the asterisk (*) operator to perform a wildcard search, as shown in the following example:



If you want to search for keywords that are no more than a specified number of words or characters apart, enclose the keywords in quotation marks, type a tilde character (~), and then type the maximum number of intermediate words or characters that can come between the keywords, as shown in the following example:



Filter Options

Use the filter options listed on the left side of the *Search* page to filter currently displayed results. The available filter options are different for cases, filings, and documents.

After you select a filter option within a filter category, **Apply** and **Clear** buttons are displayed directly above the **Search** field within the filter category (not the **Search** field at the top of the **Search** page). Then, after you finish selecting your filter options, you can click **Apply** to apply the filter options, or you can click **Clear** to clear the filter options.

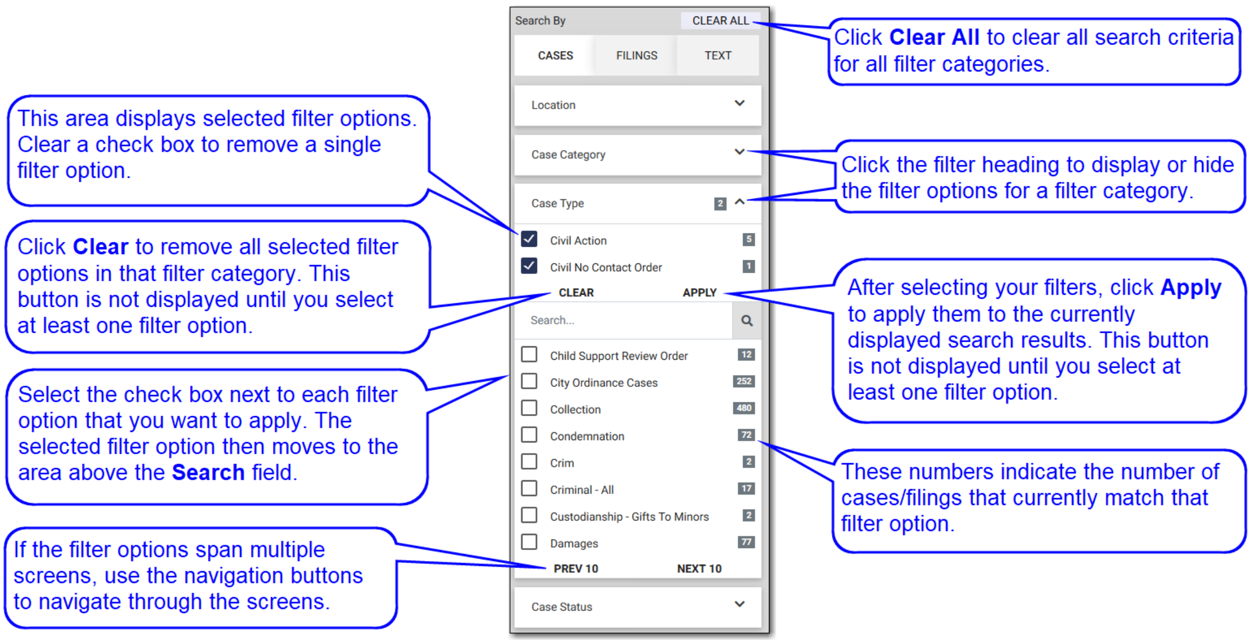


Figure 6.4 – Filter Options for Cases

In addition, when you use the **Search** field within a filter category to search for specific filter options, a new **Select All** button is displayed to allow you to select all displayed filter options with one click.

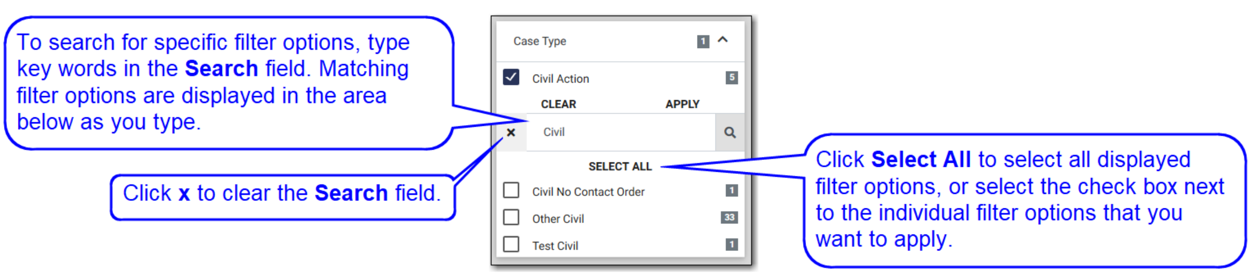


Figure 6.5 – Search Option within Filter Option Category

If you cannot see the entire name of a filter option, simply pause your mouse pointer on the option, and re:Search will display it in a tooltip as shown in the following screen shot.

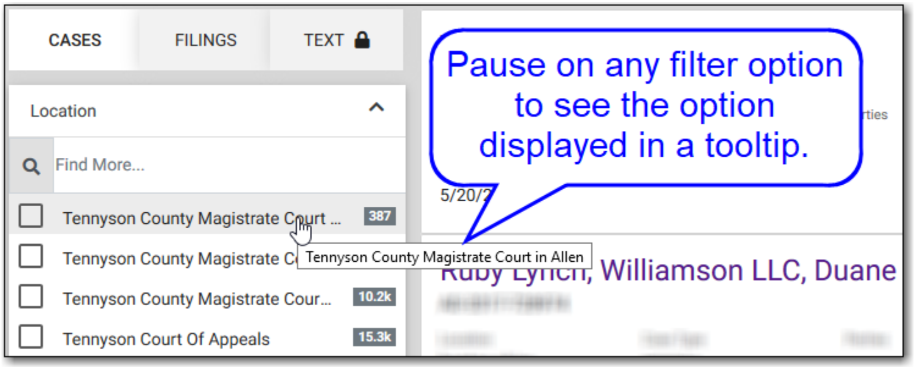


Figure 6.6 – Tooltip for Filter Option

Search Results

Search results are displayed in the center of the *Search* page.

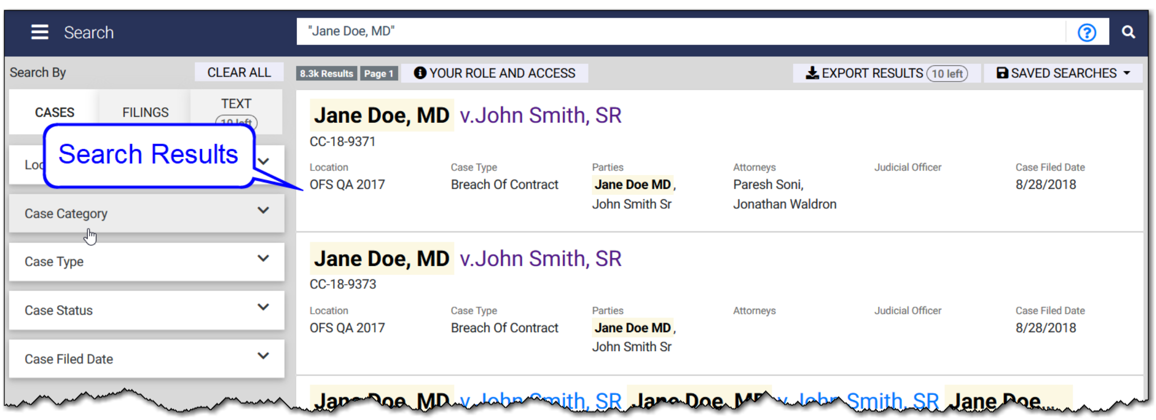


Figure 6.7 – Search Results

Information Displayed for Cases, Filings, and Documents

For cases, the following information, if available, is displayed for each case:

- Case style
- Case number
- Location
- Case type
- Parties
- Attorneys
- Judicial officer
- Case filed date

For filings, the following information, if available, is displayed for each filing:

- Filing type
- Case type
- Location
- Case number
- Case description
- Case filed date
- Filing filed date

Note: The case description is a link to the *Case Details* page for the case.

For documents, the following information, if available, is displayed for each document:

- Filing type
- Case type
- Location
- Case number
- Case description
- Case filed date
- Filing filed date
- Document
- Highlighted search terms (first five only) and surrounding text

Note: The case description is a link to the *Case Details* page for the case.

If a Locked icon ( ) is displayed next to a case, filing, or document in the search results, the case, filing, or document is marked as confidential. Depending on the state, a confidential case, filing, or document is typically available only to judges and clerks within their respective jurisdictions, an attorney on the case, a self-represented litigant (SRL) on the case, and a party on the case. If a Gavel icon ( ) is displayed next to a case or document in the search results, the case or document is sealed. Depending on the state, a sealed case or document is typically visible only to judges and clerks within their respective jurisdictions. Your state may support one or both of these security levels, or your state may use these security levels differently than how they are described here.

Note: At this time, filings cannot be marked as sealed.

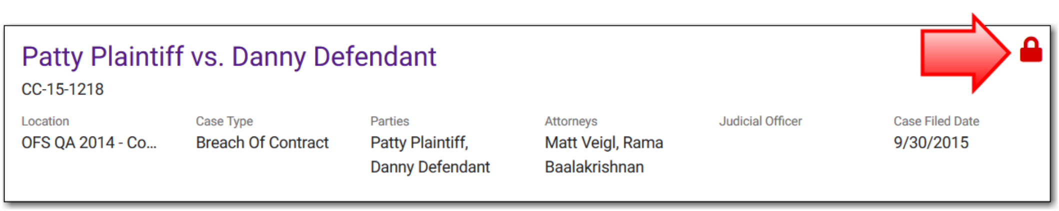


Figure 6.8 – Locked Icon Displayed for a Case

Search Results Navigation Buttons

If the search results span multiple pages, navigation buttons are displayed at the bottom of the page.

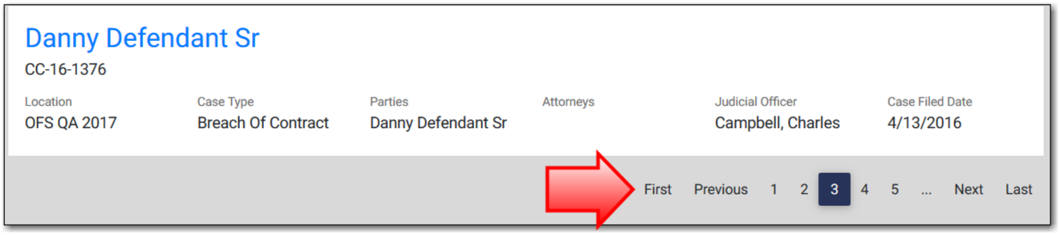


Figure 6.9 – Search Results Navigation Buttons

Shortcut Menu for Case and Filing Links

If you want to open the *Case Details* page or the *Filing Details* page in a new browser tab or window, right-click the link to open the shortcut menu, and then select **Open link in new tab** or **Open link in new window**. Depending on your browser, other options may be available.

Figure 6.10 – Shortcut Menu for Case and Filing Links

Viewed Links vs. Unviewed Links

After you click a case or filing link, the link changes from blue to purple. This is useful because when you return to the *Search* page, it tells you at a glance whether you previously viewed the case or filing.

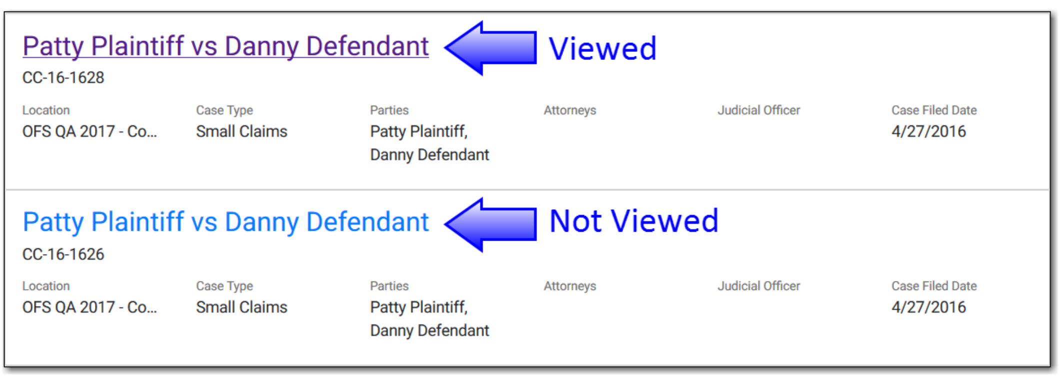


Figure 6.11 – Viewed Links vs. Unviewed Links

Note: This functionality is also available on any page or *Dashboard* card that lists cases.

Note: This functionality is not supported in the Microsoft® Internet Explorer® and Edge® browsers.

Export Results Button

Click **Export Results** to export the search results to a comma-separated values (CSV) file, which you can then open in a spreadsheet application.

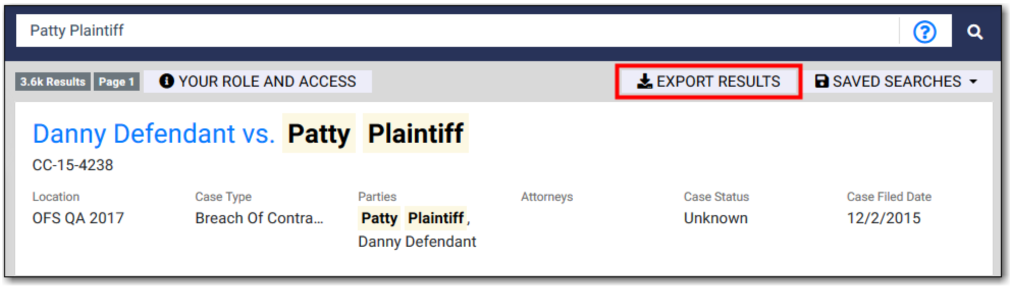


Figure 6.12 – Export Results Button on Search Page

Saved Searches Menu

If you tend to perform the same searches over and over, you can save a search to use later. Use the **Saved Searches** menu to save a new search and perform a search that you have already saved. Saved searches are also displayed on the **Saved Searches** card on the *Dashboard*.

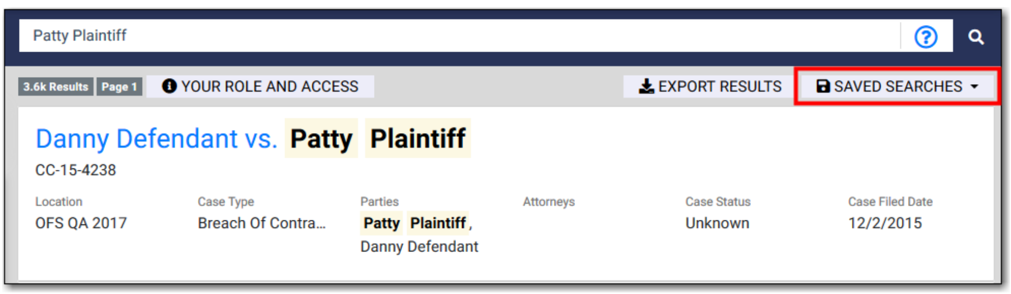


Figure 6.13 – Saved Searches Menu on Search Page

Searching for Cases and Filings

On the *Search* page, you can search for cases and filings by entering keywords in the **Search** field, selecting filter options to narrow the search results, or both.

To search for a case or filing:

1. Access the *Search* page either by clicking the **Search** card on the *Dashboard* or by clicking **Search** on the re:Search menu ( ).
2. If you are searching for a case, click **Cases**. If you are searching for a filing, click **Filings**.

   Note: The Cases option is normally selected by default. If you searched for a filing or document earlier in the session, however, the Filings or Text option may still be selected when you return to the *Search* page.
3. To perform a keyword search, type your search criteria in the **Search** field, and then press ENTER or click the Search icon ( ). Skip this step if you want to search for cases or filings using only filter options.

   Note: If you are searching for a case by its case number and the case number includes hyphens (dashes), you can omit the hyphens or enclose the case number in quotation marks to tell re:Search that you want to see only cases with the exact same case number. Otherwise, re:Search will list all cases with a similar case number.

Note: If you are searching for cases associated with a specific attorney, you can search on the attorney's name or attorney number.

Note: The Search field supports Boolean searches, which can be useful when you are trying to narrow down your search results. Click the Search Help icon (?) to display descriptions of the available Boolean search operators.

If re:Search finds any matches, it displays them in the search results area. The search results may span across multiple pages.

4. If you want to filter the search results, select the filter options.

Note: To clear a filter option, select it again. To clear all filter options for a particular filter category, click the Clear button that appears directly above the selections.

Option	Description
To filter by location:	a. Click the **Location** filter category to display the available locations. b. Select one or more locations, and then click **Apply**. If necessary, click **Next** and **Prev** to scroll through the available locations. You can also start typing the location in the **Find More** field and then select the location when it is displayed. Matching locations are displayed as you type.
To filter by case category:	a. Click the **Case Category** filter category to display the available case categories. b. Select one or more case categories, and then click **Apply**. If necessary, click **Next** and **Prev** to scroll through the available categories. You can also start typing the category in the **Find More** field and then select the category when it is displayed. Matching categories are displayed as you type.
To filter by case type:	a. Click the **Case Type** filter category to display the available case types. b. Select one or more case types, and then click **Apply**. If necessary, click **Next** and **Prev** to scroll through the available case types. You can also start typing the case type in the **Find More** field and then select the case type when it is displayed. Matching case types are displayed as you type.
To filter by case status (Cases only):	a. Click the **Case Status** filter category to display the available case statuses. b. Select one or more case statuses, and then click **Apply**.

<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td>To filter by case filed date:</td><td>a. Click the Case Filed Date filter category to display the predefined date ranges.
b. Select one or more of the following predefined date ranges:
• In The Last Year
• In The Last Month
• In The Last Week
• Yesterday
• Today
c. Click Apply.

To specify your own date range, perform the following steps:
a. Click Choose Dates.
b. Click From Date, and then select a beginning date from the calendar that is displayed.
c. Click To Date, and then select an end date from the calendar that is displayed. To use the current date, leave this field blank.
d. Click Search.</td></tr>
<tr><td>To filter by filing type (Filings only):</td><td>a. Click the Filing filter category to display the available filing types.
b. Select one or more filing types, and then click Apply.

If necessary, click Next and Prev to scroll through the available filing types. You can also start typing the filing type in the Find More field and then select the filing type when it is displayed. Matching filing types are displayed as you type.</td></tr>
<tr><td>To filter by file date (Filings only):</td><td>a. Click the File Date filter category to display the predefined date ranges.
b. Select one or more of the following predefined date ranges:
• In The Last Year
• In The Last Month
• In The Last Week
• Yesterday
• Today
c. Click Apply.

To specify your own date range, perform the following steps:
a. Click Choose Dates.
b. Click From Date, and then select a beginning date from the calendar that is displayed.
c. Click To Date, and then select an end date from the calendar that is displayed. To use the current date, leave this field blank.
d. Click Search.</td></tr>
</table>

When you select a filter option, the filter is applied automatically. In addition, the selected filter option moves to the top of the filter option list so that you can more easily review which options you have selected and clear any, if necessary.

5. Once you locate the case or filing that you want to view, click the case or filing link to open the *Case Details* page for the case or the *Filing Details* page for the filing.

Figure 6.14 – Case and Filing Links

Searching for Documents

On the *Search* page, you can search for text within documents by entering keywords in the **Search** field. You can also select filter options to narrow the search results.

To search for a document:

1. Access the *Search* page either by clicking the **Search** card on the *Dashboard* or by clicking **Search** on the re:Search menu ().
2. Click **Text**.
3. Type your search criteria in the **Search** field, and then press ENTER or click the Search icon ().

   Note: The Search field supports Boolean searches, which can be useful when you are trying to narrow down your search results. Click the Search Help icon (?) to display descriptions of the available Boolean search operators.

   If re:Search finds any matches, it displays them in the search results area. For each match, re:Search displays the filing details, the document, the matching text (highlighted in yellow), and the surrounding text to give it some context. Note that re:Search will show only the first five matches within a document.

   Note: Remember that search results may span across multiple pages.

4. If you want to filter the search results, select the filter options.

Note: To clear a filter option, select it again. To clear all filter options for a particular filter category, click the Clear button that appears directly above the selections.

Option	Description
To filter by location:	a. Click the **Location** filter category to display the available locations. b. Select one or more locations, and then click **Apply**. If necessary, click **Next** and **Prev** to scroll through the available locations. You can also start typing the location in the **Find More** field and then select the location when it is displayed. Matching locations are displayed as you type.
To filter by case category:	a. Click the **Case Category** filter category to display the available case categories. b. Select one or more case categories, and then click **Apply**. If necessary, click **Next** and **Prev** to scroll through the available categories. You can also start typing the category in the **Find More** field and then select the category when it is displayed. Matching categories are displayed as you type.
To filter by case type:	a. Click the **Case Type** filter category to display the available case types. b. Select one or more case types, and then click **Apply**. If necessary, click **Next** and **Prev** to scroll through the available case types. You can also start typing the case type in the **Find More** field and then select the case type when it is displayed. Matching case types are displayed as you type.
To filter by case filed date:	a. Click the **Case Filed Date** filter category to display the predefined date ranges. b. Select one or more of the following predefined date ranges: • In The Last Year • In The Last Month • In The Last Week • Yesterday • Today c. Click **Apply**. To specify your own date range, perform the following steps: a. Click **Choose Dates**. b. Click **From Date**, and then select a beginning date from the calendar that is displayed. c. Click **To Date**, and then select an end date from the calendar that is displayed. To use the current date, leave this field blank. d. Click **Search**.

Option	Description
To filter by filing type:	a. Click the **Filing** filter category to display the available filing types. b. Select one or more filing types, and then click **Apply**. If necessary, click **Next** and **Prev** to scroll through the available filing types. You can also start typing the filing type in the **Find More** field and then select the filing type when it is displayed. Matching filing types are displayed as you type.
To filter by file date:	a. Click the **File Date** filter category to display the predefined date ranges. b. Select one or more of the following predefined date ranges: • In The Last Year • In The Last Month • In The Last Week • Yesterday • Today c. Click **Apply**. To specify your own date range, perform the following steps: a. Click **Choose Dates**. b. Click **From Date**, and then select a beginning date from the calendar that is displayed. c. Click **To Date**, and then select an end date from the calendar that is displayed. To use the current date, leave this field blank. d. Click **Search**.

When you select a filter option, the filter is applied automatically. In addition, the selected filter option moves to the top of the filter option list so that you can more easily review which options you have selected and clear any, if necessary.

5. Once you locate the document that you want to view, do one of the following:

    - Click the filing link to display the *Filing Details* page for the filing.
    - Click the file name to open or preview the document, depending on whether you already own the document.
    - Click **Add** to add the document to your shopping cart. If you change your mind, click **Remove** to remove the document from your shopping cart. If `Owned` is displayed, you already bought the document or are not required to purchase the document.

    Note: The Add button changes to a Remove button after you add the document to the shopping cart.

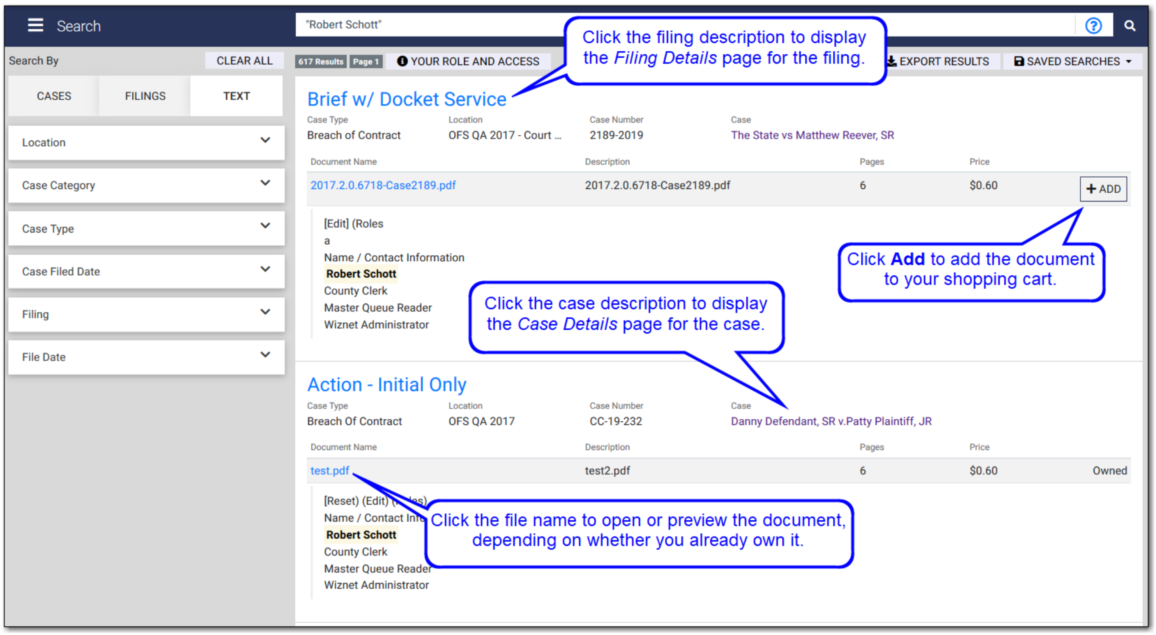


Figure 6.15 – Search Results for In-Document Text Searching

Saving Searches

If you perform the same searches over and over, you can save a search so that you do not have to reenter the same search criteria each time you perform the search.

To save a search:

1. Access the *Search* page by clicking the **Search** card on the *Dashboard* or by clicking **Search** on the re: Search menu (☰).
2. Enter your search criteria.
3. Once you are satisfied with the search results, click **Saved Searches**.

4. Type a name for the search in the **New Name** field.

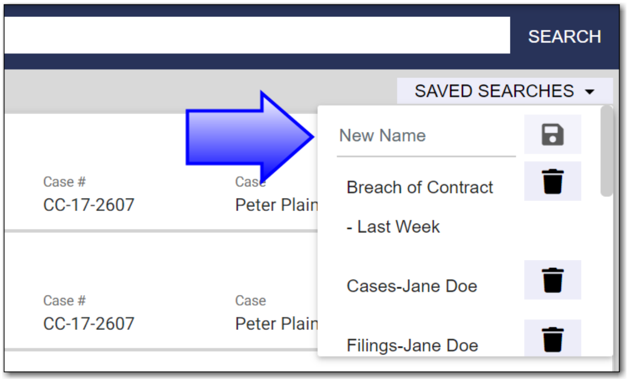


Figure 6.16 – New Name Field for Saved Search

5. Either click or press ENTER.

The search is displayed on the **Saved Searches** card on the *Dashboard* under the name you specified.

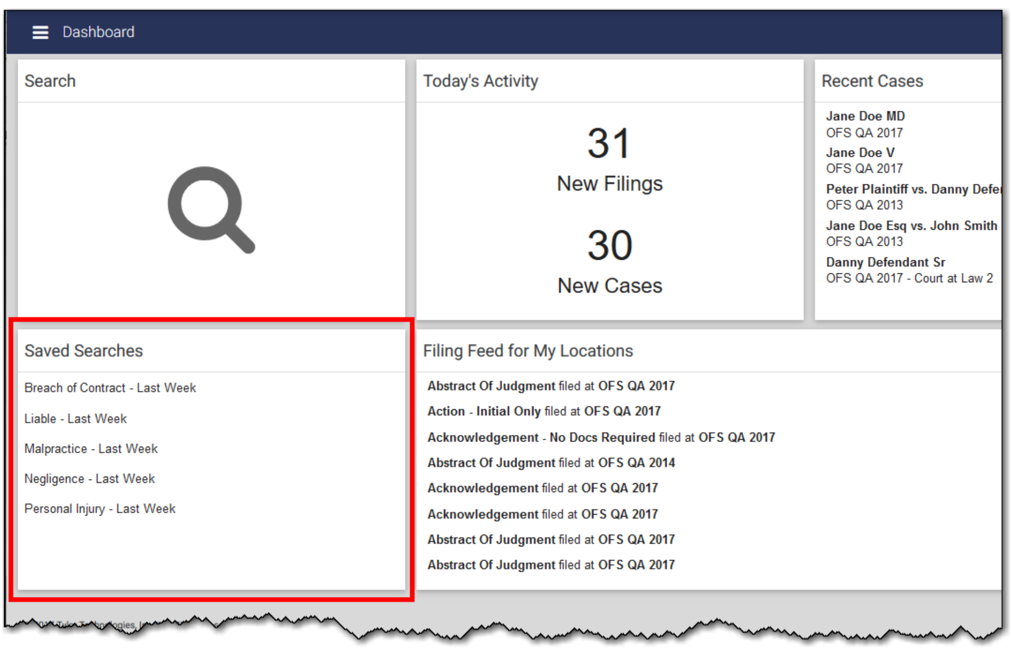


Figure 6.17 – Saved Searches Card

Applying Saved Searches

Once you have saved a search, you can initiate that search from either the *Dashboard* or the *Search* page.

To apply a saved search:

Option	Description
On the Dashboard:	Click the saved search in the **Saved Search** card on the *Dashboard*.
On the *Search* page:	1. Access the *Search* page either by clicking the **Search** card on the *Dashboard* or by clicking **Search** on the re:Search menu ( ). 2. Click **Saved Searches**. 3. Click the saved search.

The saved search is performed automatically.

Deleting Saved Searches

If you no longer need a saved search, you can easily delete it.

To delete a saved search:

1. Access the *Search* page either by clicking the **Search** card on the *Dashboard* or by clicking **Search** on the re:Search menu ( ).
2. Click **Saved Searches**.
3. Click next to the saved search that you want to delete.

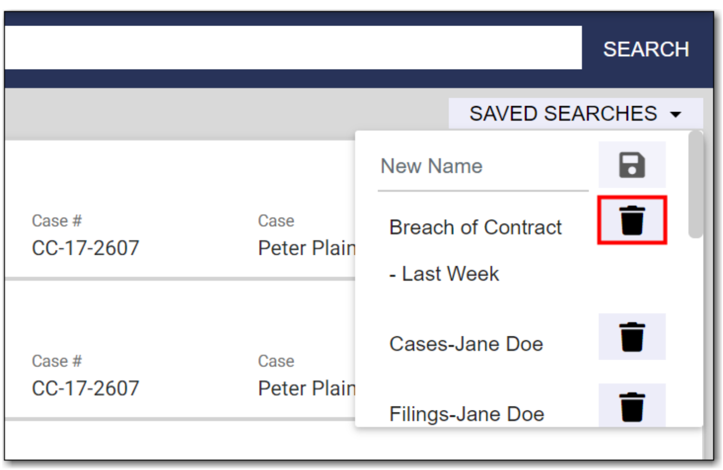


Figure 6.18 – Deleting a Saved Search

The saved search is removed.

Downloading Search Results

You can download the search results to a comma-separated values (CSV) file and then open the file in a spreadsheet application, such as Microsoft® Excel®, Google Sheets™, or Apple® Numbers®.

To download search results:

1. Access the *Search* page either by clicking the **Search** card on the *Dashboard* or by clicking **Search** on the re:Search menu ( ).
2. Enter your search criteria.
3. Once you are satisfied with the search results, click **Export Results**.

   re:Search exports the search results. Depending on your browser or device, you may be prompted to save the file or open it in a spreadsheet application, or the file may open automatically in a default spreadsheet application.

   In the spreadsheet, the search results are displayed in columns as follows:

Search Results	Columns
Cases	Case Description Case Number Case Location Case Type Case Filed Date Case Status Attorneys Judicial Officer
Filings	Filing Code Filing Description Case Description Case Number Case Location Case Type Case Status Case Filed Date Judicial Officer
Text (Document Text)	Case Description Case Number Filing Code Document Name Pages Content Text

The following figure is an example of how case search results are displayed in an Excel spreadsheet.

	A	B	C	D	E	F	G	H
1	Case Description	Case Number	Case Location	Case Type	Case Filed Date	Case Status	Attorneys	Judicial Officer
2	Rick Villareal vs. Texas Liberty	CC-16-9424	Denton County Court at Law	Condemnation	9/3/2015	Open	Jack Stone	Bessel, Karen
3	Matt Veigl vs. Tony Spears	CC-16-0327	Denton County Court at Law	Condemnation	1/4/2016	Open	Victor Evans, Jeff Moore	Bessel, Karen
4	Peter Plaintiff vs. Danny Defendant	CC-16-1826	Denton County Court at Law	City Ordinance Cases	12/6/2016	Open	Jack Stone	Judge Mathis
5	Monica Singh v. Rajat Singh	CC-15-9477	Denton County Court at Law	Divorce	8/28/2015		Jack Stone	Barton, Robert R.
6	Jane Doe, MD v.John Smith, MD	CC-16-1669	Denton County Court at Law	Appellate Case	11/22/2016	Open	Jeff Moore	Barton, Robert R.
7	Debbie Defendant vs Penny Plaintiff	CC-17-1521	Denton County Court at Law	Breach Of Contract	12/22/2017	Open	Pro Se, Pro Se	Clark, Fred

Figure 6.19 – Search Results in Excel Spreadsheet

7 Case Details and Filing Details

Topics covered in this chapter

The *Case Details* page displays key information about the case, the parties and attorneys connected to the case, and all related filings. Although it is not shown in the following example, charge and hearing information can also be displayed.

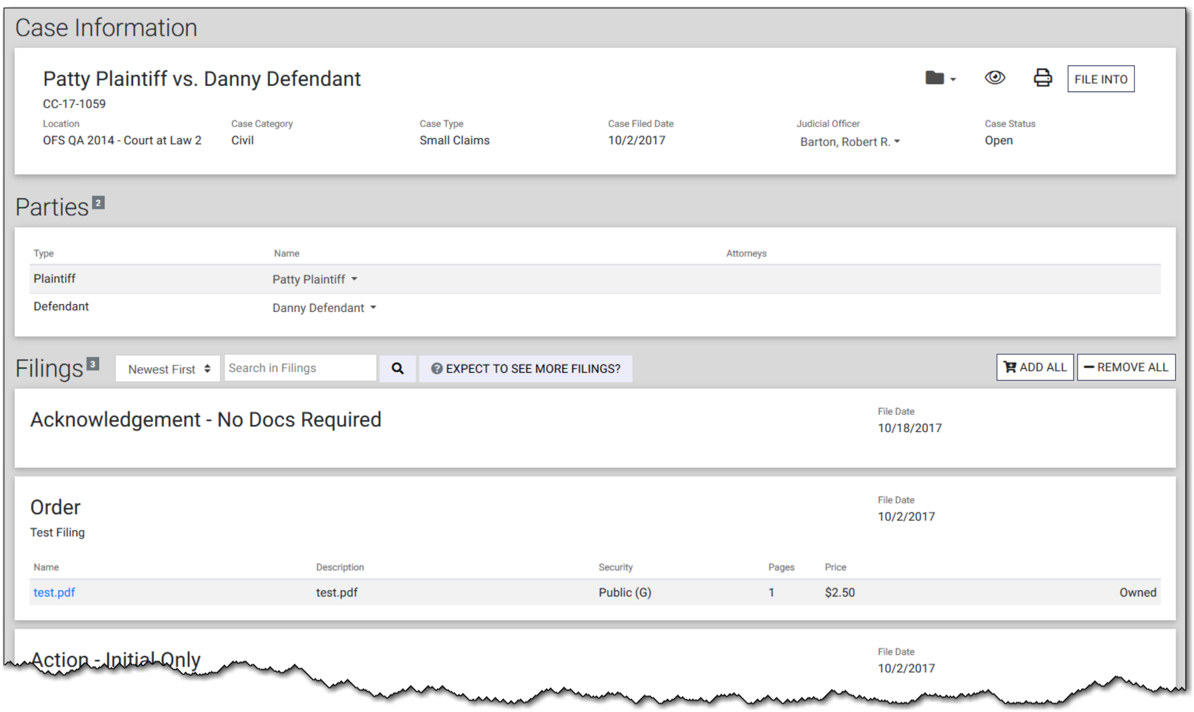


Figure 7.1 – Case Details Page

The *Filing Details* page displays key information about the case and just one filing.

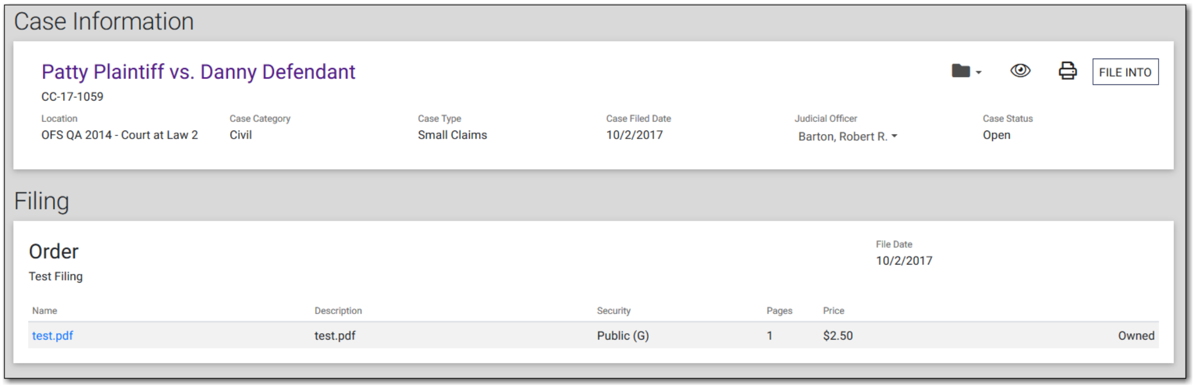


Figure 7.2 – Filing Details Page

Note: The preceding figures show the *Case Details* page and the *Filing Details* page as they appear for attorneys and other non-court users. For court users, the pages include additional options.

As shown in the preceding figures, the *Case Details* page and the *Filing Details* page display information in sections, which are described on the following pages.

Case Information Section

On both the *Case Details* page and the *Filing Details* page, the **Case Information** section displays information about the case.

Figure 7.3 – Case Information Section on the Case Details Page

Case Information Section Details and Options

The following fields and options are included in the **Case Information** section.

Field/Option	Description
Case Description	The case description is the name or title of the case. On the *Filing Details* page, you can click the case description to display the *Case Details* page for the case. This link is available only on the *Filing Details* page. **Note: If a case description is not available for any reason, re:Search uses the case number for the case description.**
Case Number	The case number is the number assigned to the case by the court.

<table>
<tr><th>Field/Option</th><th>Description</th></tr>
<tr><td>Location</td><td>The location is the court to which the case is assigned.</td></tr>
<tr><td>Case Category</td><td>This field displays the case category. Depending on how cases are categorized in your location, categories may include the following:
Appellate
Criminal
Civil
Family
Probate or Mental Health</td></tr>
<tr><td>Case Type</td><td>The case type is the type of case within the case category.</td></tr>
<tr><td>Case Filed Date</td><td>The case-filed date is the date on which the case was filed.</td></tr>
<tr><td>Conditions</td><td>This field is used for displaying interim conditions on criminal cases. The Conditions field is displayed any time charges are linked to the case, even when no interim conditions have been added.
If a View link is displayed in the Conditions field, interim conditions have been added to the case. Click the View link to display details about the interim conditions.
If a hyphen (-) is displayed in the Conditions field, no interim conditions have been added to the case.</td></tr>
<tr><td>Judicial Officer</td><td>The judicial officer is the judge to whom the case is assigned.
Click the judicial officer's name to open the Name Options menu. From the Name Options menu, you can do the following:
Select Name Alert to set a name alert. When you set a name alert, re:Search notifies you by email whenever that name is added to a case.
Select Search to search for other cases or filings with the same judicial officer.
Note: If a judge has not been assigned, this field is not displayed.</td></tr>
<tr><td>Clerk’s Office</td><td>The clerk’s office is where the case is filed. Click the name of the clerk’s office to display contact information and a link to the office’s website.
Note: If contact information has not been defined for the office, this field is not displayed.</td></tr>
</table>

Field/Option	Description
Case Status	The case status indicates whether the case is open or closed according to the court system. The case status can be one of the following: • **Open**—The case is open. • **Closed**—The case is closed. • **Unknown**—The case status is unavailable. **Note: In integrated locations, the court's case management system (CMS) sends the case status to re:Search, so the case status is updated automatically when a case is closed. In non-integrated locations, the clerk admin must update the case status manually when necessary.**
	A Locked icon ( ) is displayed when the case is marked confidential. Depending on the state, a confidential case, filing, or document is typically available only to judges and clerks within their respective jurisdictions, an attorney on the case, a self-represented litigant (SRL) on the case, and a party on the case.
	A Gavel icon ( ) is displayed when the case is sealed. Depending on the state, a sealed case or document is typically visible only to judges and clerks within their respective jurisdictions.
	Use this drop-down list to save the case to a folder on the **My Folders** card on the *Dashboard*. You can create a new folder at the same time by entering a folder name in the **New Folder Name** field. If you have already saved the case to a folder, the name of the folder is displayed, as shown in the following example: Family - Divorce
(case alert not set) **(case alert set)**	Click the Case Alert icon to set or remove a case alert. The Case Alert icon is white ( ) when a case alert is not set, and the icon is dark ( ) when a case alert is set.
	Click the Case Summary icon ( ) to display the case summary that is connected to the case in the court's CMS. Depending on your browser, the case summary opens in a new tab or browser window. If the case summary is not available for any reason, the icon is not displayed. **Note: The name used for the case summary in your court may be different. For example, it may be called a Register of Actions or a docket sheet.** **Note: This option is available only in locations that are integrated with their court's CMS. This option must be configured for your site.**

Field/Option	Description
🖶	Click the Print View icon (🖶) to display a simplified view of the *Case Details* page that is optimized for printing. The print view opens in a new tab or browser window, depending on your browser. **Note: When you view re:Search on a small mobile device or resize your window to make it smaller, the Print View icon becomes the Print View option on the More Options menu (⋮) to save room.**
≪	Click the Share Case icon (≪) to open the *Share Case* dialog box, and then choose one of the following options: • Click **Copy** to copy a link to the *Case Details* page to your clipboard. You can then paste the link into any email, text message, spreadsheet, or other document that you choose. • Click **Email** to start an email. The email will include a subject in the subject line and a link to the *Case Details* page in the body of the email. You can change the subject or modify the body of the email before sending it.

Field/Option	Description
File Into	Click this button to file into the case. re:Search will direct you to your e-filing service provider to complete the process.
⋮	On the More Options menu (⋮), you can do the following: • Select **Edit** to open the *Edit Case Information* dialog box and update the case information. This function is available only to clerk admins within their jurisdictions and only for cases in non-integrated locations. • Select **Mark as Confidential** to mark the case as confidential. When available on your site, this function is available only to clerk admins within their jurisdictions and only for cases in non-integrated locations. • Select **Mark as Non-confidential** to mark the case as non-confidential. When available on your site, this function is available only to clerk admins within their jurisdictions and only for cases in non-integrated locations. • Select **Mark as Sealed** to mark the case as sealed. When available on your site, this function is available only to clerk admins within their jurisdictions and only for cases in non-integrated locations. • Select **Change Log** to display the change log for the case. The change log is a list of changes made to the case. This function is available only to clerk admins within their jurisdictions. • Select **Viewer Log** to display the viewer log for the case. The viewer log is a list of users who have viewed the case. This function is available only to clerk admins within their jurisdictions.

Filing into Cases

If you would like to e-file documents into existing cases, you can start the process in the **Case Information** section on either the *Case Details* page or the *Filing Details* page. re:Search then directs you to your e-filing service provider to complete the process.

To file documents into cases:

1. Access the *Case Details* page for the case, or access the *Filing Details* page for any filing attached to the case.
2. In the **Case Information** section, click **File Into**.

   If you are in a location that supports two or more e-filing service providers and you have not already selected a preferred e-filing service provider, re:Search prompts you to do so now.
3. If prompted, select your preferred e-filing service provider from the drop-down list on the *Choose Preferred EFiling Service Provider* dialog box, and then click **Continue**.

   re:Search redirects you to your e-filing service provider by opening its website in a new tab.

Note: If you signed in to re:Search with your Odyssey File & Serve or eFile account, re:Search will sign you in to that account and then directly access the case.

Searching for Cases and Filings with Matching Judicial Officer

You can use the **Case Information** section of the *Case Details* page to display a list of other cases and filings with the same judicial officer.

Note: This function is possible only if a judicial officer has been assigned to the case. If a judicial officer has not been assigned, the Judicial Officer column is not displayed in the Case Information section.

To search for other cases and filings with the same judicial officer:

1. Access the *Case Details* page for the case.

   Note: If you are currently viewing the *Filing Details* page for a related filing, click View Case to access the *Case Details* page.

2. In the **Case Information** section, click the judicial officer's name in the **Judicial Officer** column to open the Name Options menu, and then click **Search**.

   re:Search opens a new browser tab and displays all cases with a matching judicial officer.

3. If you want to see a list of filings with a matching judicial officer, click **Filings**.

   re:Search now displays all filings with a matching judicial officer.

4. Click any case or filing in the search results to view details for that case or filing.

Charges Section

On the *Case Details* page, the **Charges** section displays the offense date, charge, degree, and disposition for all charges linked to the case. The **Charges** section is displayed only for criminal cases.

Note: This functionality is currently available only in integrated court locations that use Odyssey® Case Manager™ as their case management system (CMS).

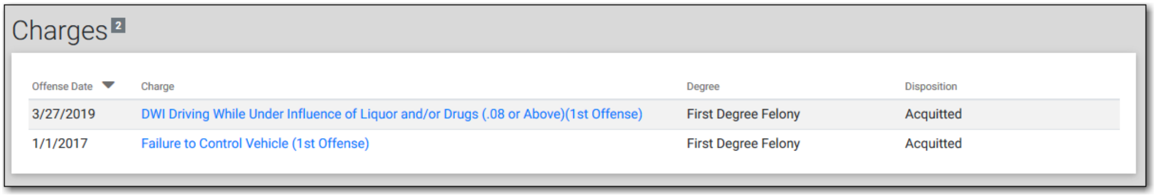


Figure 7.4 – Charges Section on the Case Details Page

re:Search can display up to 10 charges in the **Charges** section at one time. If more than 10 charges are linked to the case, navigation buttons are displayed to allow you to browse through the charges.

Clicking the charge description displays a summary of the charge.

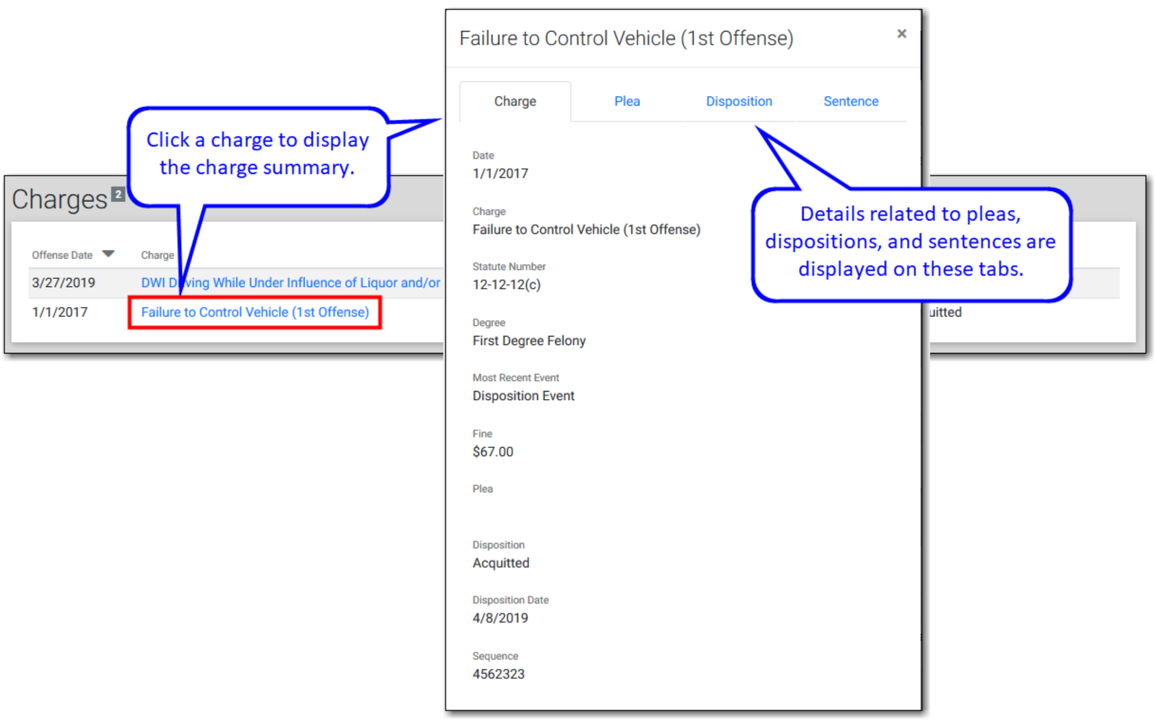


Figure 7.5 – Charge Summary

Charges Section Details

The **Charges** section displays charge details in columns. The following details, when available, are displayed for each charge.

Column/Option	Description
Offense Date	This column displays the date of the offense. Clicking the column heading sorts the charges in ascending or descending order by offense date.
Charge	This column displays the charge description. Click the charge description to display the charge summary.
Degree	This column displays the offense degree for the charge.
Disposition	This column displays the disposition for the charge.

Charge Summary Details—Charge Tab

When available, the following details are displayed on the **Charge** tab of the charge summary.

Field	Description
Date	This field displays the date when the offense was committed.
Charge	This field displays the charge brought against the defendant connected to the case.
Statute Number	This field displays the statute number for the charge.
Degree	This field displays the degree of the charge.
Most Recent Event	This field displays the last docketable event (plea, disposition, sentence, etc.) entered on the charge.
Fine	This field displays the applicable fine, if any.
Plea	This field displays the plea entered on the charge.
Disposition	This field displays the disposition entered on the charge.
Disposition Date	This field displays the date on which the disposition was entered on the charge.
Sequence	This field displays the sequence number.

Charge Summary Details—Plea Tab

When available, the following details are displayed on the **Plea** tab of the charge summary.

Field	Description
Plea	This field displays the plea entered on the charge.
Plea Date	This field displays the date on which the plea was entered on the charge.
Plea Judge	This field displays the name of the judge assigned to the case when the plea was entered on the charge.
Jury Trial Demand	If a jury trial will be held for the defendant, this field displays the status of the jury trial.

Field	Description
Jury Trial Demand Date	If applicable, this field displays the date on which the jury trial will be held.
Speedy Trial Demand	If a speedy trial will be held for the defendant, this field displays the status of the speedy trial.
Speedy Trial Demand Date	If applicable, this field displays the date on which the speedy trial will be held.

Charge Summary Details—Disposition Tab

When available, the following details are displayed on the **Disposition** tab of the charge summary.

Field	Description
Disposition	This field displays the disposition entered on the charge.
Disposition Date	This field displays the date on which the disposition was entered on the charge.
Disposition Judge	This field displays the name of the judge assigned to the case when the disposition was entered on the charge.

Charge Summary Details—Sentence Tab

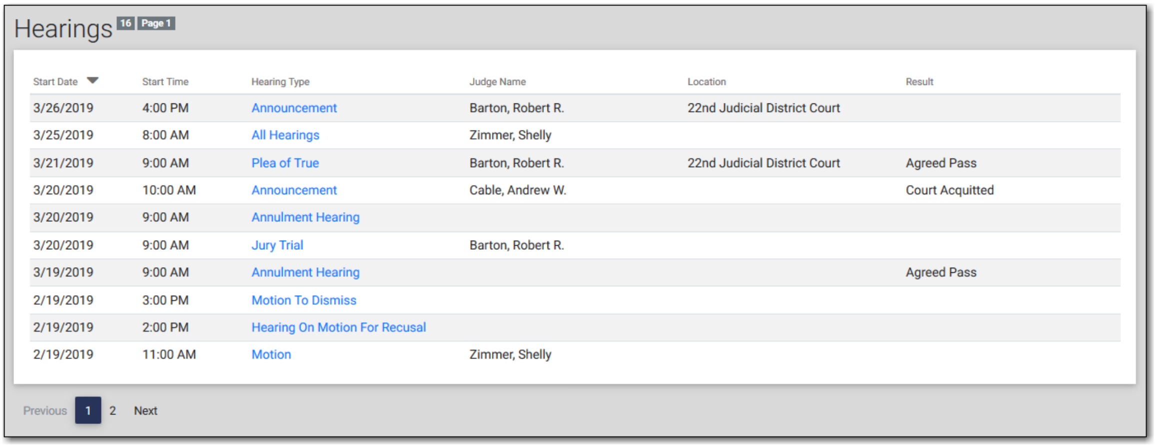
When available, the following details are displayed on the **Sentence** tab of the charge summary.

Field	Description
Sentence	This field displays the sentence entered on the charge.
Sentence Date	This field displays the date on which the sentence was entered on the charge.
Sentence Judge	This field displays the name of the judge assigned to the case when the sentence was entered on the charge.

Hearings Section

On the *Case Details* page, the **Hearings** section lists all hearings associated with the case. If no hearings are associated with the case, the **Hearings** section is not displayed.

Note: This functionality is currently available only in integrated court locations that use Odyssey® Case Manager™ as their case management system (CMS).



Hearings 16 Page 1

Start Date	Start Time	Hearing Type	Judge Name	Location	Result
3/26/2019	4:00 PM	Announcement	Barton, Robert R.	22nd Judicial District Court	
3/25/2019	8:00 AM	All Hearings	Zimmer, Shelly		
3/21/2019	9:00 AM	Plea of True	Barton, Robert R.	22nd Judicial District Court	Agreed Pass
3/20/2019	10:00 AM	Announcement	Cable, Andrew W.		Court Acquitted
3/20/2019	9:00 AM	Annulment Hearing			
3/20/2019	9:00 AM	Jury Trial	Barton, Robert R.		
3/19/2019	9:00 AM	Annulment Hearing			Agreed Pass
2/19/2019	3:00 PM	Motion To Dismiss			
2/19/2019	2:00 PM	Hearing On Motion For Recusal			
2/19/2019	11:00 AM	Motion	Zimmer, Shelly		

Previous 1 2 Next

Figure 7.6 – Hearings Section

re:Search can display up to 10 hearings in the **Hearings** section at one time. If more than 10 hearings are associated with the case, navigation buttons are displayed to allow you to browse through the hearings.

Clicking the hearing type displays a summary of the hearing.

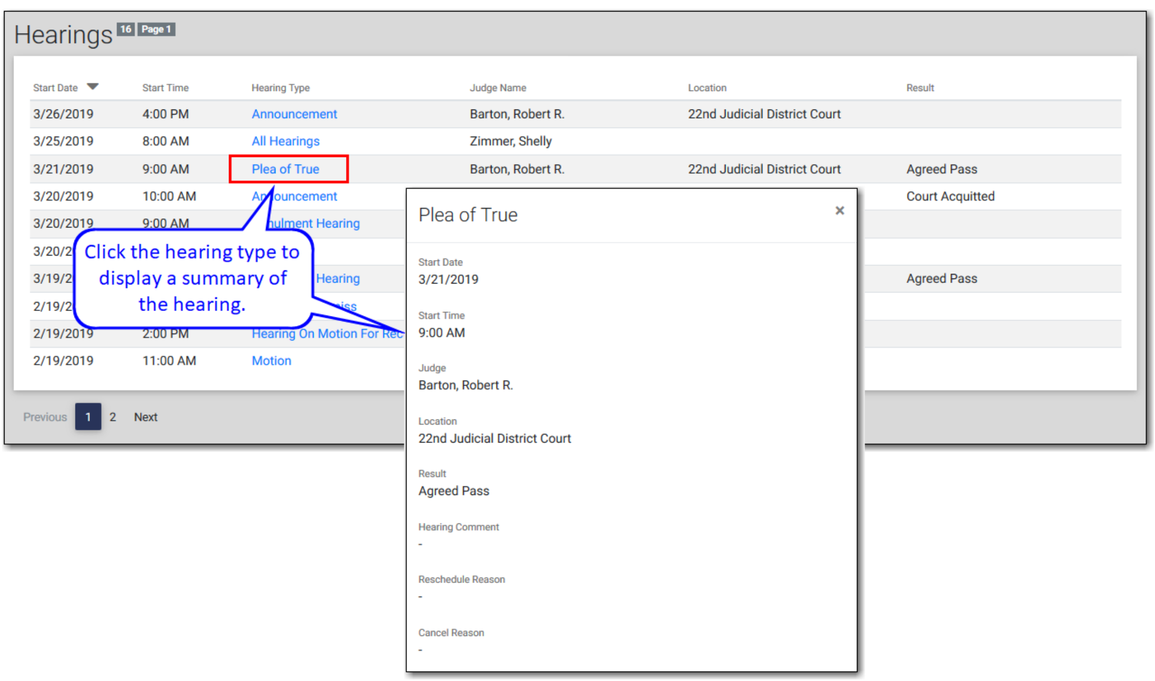


Figure 7.7 – Hearing Summary

Hearings Section Details

The **Hearings** section displays hearing details in columns. The following details, when available, are displayed for each hearing.

Column/Option	Description
Start Date	This column displays the start date for the hearing. Clicking the column heading sorts the hearings in ascending or descending order by start date.
Start Time	This column displays the start time for the hearing.
Hearing Type	This column displays the hearing type. Click the hearing type to display the hearing summary.
Judge Name	This column displays the name of the presiding judge.
Location	This column displays the court location.
Result	This column displays the hearing result or the cancel reason.

Hearing Summary Details

When available, the following details are displayed on the hearing summary.

Field	Description
Hearing Type	The hearing type is displayed at the top of the summary.
Start Date	This field displays the date of the hearing.
Start Time	This field displays the time when the hearing starts.
Judge	This field displays the name of the presiding judge.
Location	This field displays the hearing location.
Result	This field displays the hearing result.
Hearing Comment	If hearing comments are available, they are displayed in this field.
Reschedule Reason	If the hearing was rescheduled, this field displays the reason.
Cancel Reason	If the hearing was canceled, this field displays the reason.

Parties Section

On the *Case Details* page, the **Parties** section lists all parties and attorneys connected to the case.

Figure 7.8 – Parties Section

Parties Section Details and Options

The following fields and options are included for each party in the **Parties** section.

Field/Option	Description
Type	This field identifies the party's relationship to the case.
Name	This field displays the name of the party. Click the name to open the Name Options menu. From the Name Options menu, you can do the following: • Select **Name Alert** to set a name alert. When you set a name alert, re:Search notifies you by email whenever that name is added to a case. • Select **Search** to search for the party's other cases or filings. • Select **Give Party Access** to give the party access to the case. This option is available only to clerk admins within their jurisdictions. • Select **Add Attorney** to add an attorney to a party. This function is available only to clerk admins within their jurisdictions and only for cases in non-integrated locations. • Select **Mark as Confidential** to mark the party as confidential. When available on your site, this function is available only to clerk admins within their jurisdictions and only for cases in non-integrated locations. • Select **Mark as Non-Confidential** to mark the party as non-confidential. When available on your site, this function is available only to clerk admins within their jurisdictions and only for cases in non-integrated locations. • Select **Mark as Sealed** to mark the party as sealed. When available on your site, this function is available only to clerk admins within their jurisdictions and only for cases in non-integrated locations.

Field/Option	Description
	A Locked icon ( ) next to a party indicates that the party is marked as confidential. Depending on the state, a confidential party is typically visible only to judges and clerks within their respective jurisdictions, an attorney on the case, a self-represented litigant (SRL) on the case, and a party on the case.
	A Gavel icon ( ) next to a party indicates that the party is marked as sealed. Depending on the state, a sealed party is typically visible only to judges and clerks within their respective jurisdictions.
Attorneys	This field displays the name of the attorney who represents the party. Click the name to open the Name Options menu. From the Name Options menu, you can do the following: • Select **Name Alert** to set a name alert. When you set a name alert, re:Search notifies you by email whenever that name is added to a case. • Select **Search** to search for other cases or filings with that attorney. • Select **Remove Attorney** to remove the attorney from the party. This function is available only to clerk admins within their jurisdictions and only for cases in non-integrated locations. The Name Options menu also displays the attorney's attorney number.

Searching for Cases and Filings with Matching Party or Attorney

You can use the **Parties** section of the *Case Details* page to display a list of other cases and filings for a particular party or attorney.

To search for other cases and filings with the same party or attorney:

1. Access the *Case Details* page for the case.

   Note: If you are currently viewing the *Filing Details* page for a related filing, click View Case to access the *Case Details* page.

2. In the **Parties** section, do one of the following: .

   - To search for a party's other cases and filings, click the party's name in the **Name** column to open the Name Options menu, and then click **Search**.
   - To search for an attorney's other cases and filings, click the attorney's name in the **Attorneys** column to open the Name Options menu, and then click **Search**.

   re:Search opens a new browser tab and displays all cases with a matching party or attorney.

3. If you want to see a list of filings with a matching party or attorney, click **Filings**.

   re:Search now displays all filings with a matching party or attorney.

4. Click any case or filing in the search results to view details for that case or filing.

Filings and Filing Sections

On the *Case Details* page, the **Filings** section displays information about all filings for a case. The number of filings is displayed next to the **Filings** section heading. On the *Filing Details* page, the **Filing** section displays information for only one filing.

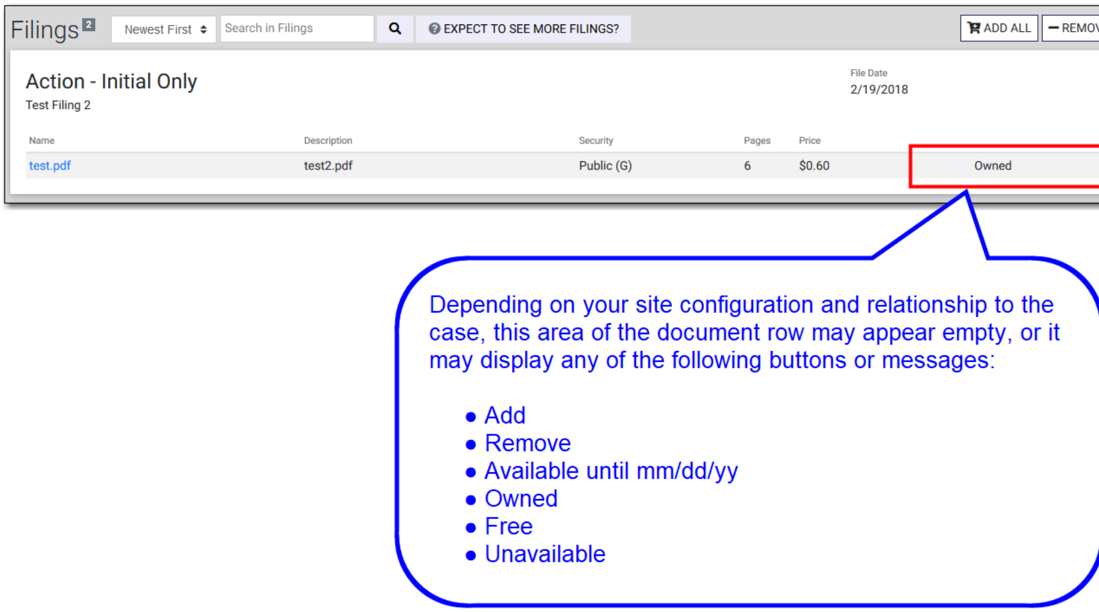


Figure 7.9 – Filings Section on Case Details Page

Sort Order and Search Options

On the *Case Details* page, you can change the order in which the filings are listed, and you can search for a specific filing.

Note: These options are not available on the *Filing Details* page because it lists only one filing.

Field/Option	Description
Sort Order	Select **Newest First** from the **Sort Order** drop-down menu to list the newest filings first. This option is the default sort order. Select **Oldest First** to list the oldest filings first.
Search in Filings	Use this field to search through the filings attached to the case. Search criteria can include a filing code or description or a document file name or description.
Expect To See More Filings?	Click this button to display the *Expect to See More Filings on this Case?* dialog box, which lists reasons why you might not see all of the filings on the case. If necessary, you can use this dialog box to send feedback to Tyler Technologies customer support.
Add Filing	Click this button to add a new filing to the case. This function is available only to clerk admins within their jurisdictions and only for cases in non-integrated locations.

Field/Option	Description
Add All	Click this button to add all documents on the case to the shopping cart.
Remove All	Click this button to remove all documents on the case from the shopping cart. **Note: Documents from other cases will not be removed from the shopping cart.**

Filings Section Details and Options

The following fields and options are included for each filing in the **Filings** section.

Note: Depending on your state and your site configuration, some fields and options may not be available.

Field/Option	Description
Filing Type	The filing type indicates the type of document that was submitted to the court.
Filing Summary	The filing summary is a brief summary of the filing provided by the filer. If the filer did not provide a summary, this field is not displayed.
File Date	The file date is the date on which the document was filed into the case.
Name	This field displays the file name of the document attached to the filing. Click the file name to view the document. If you need to purchase the document first, clicking the file name displays a preview of the document instead of the entire document.
Description	This field displays a brief description of the document as provided by the filer.
Security	This field displays the security level assigned to the document.
Pages	This field displays the length of the document.
Price	If applicable, this field displays the price of the document. If the document is free, or if your state does not support document purchases, the price is not displayed. **Note: The state determines the pricing structure.**
Free	This message is displayed if your state supports document purchases but you are not required to purchase the document for any reason (for example, documents might be free in certain court locations).
Add	Click this button to add the document to the shopping cart. This button is displayed only if you need to purchase the document before you can view it.
Remove	Click this button to remove the document from the shopping cart. This button is displayed only if you have already added the document to your shopping cart.

Field/Option	Description
Available until mm/dd/yy	This message indicates the purchase expiration date of the document. This message is displayed only if you purchased the document in a state in which document purchases expire.
Owned	This message is displayed if you have free access to the document, if you purchased the document and the document purchase has not yet expired, or if you purchased the document in a state in which document purchases do not expire.
Unavailable	This message is displayed if the document is not available for purchase or cannot be viewed for any reason (for example, if there is a problem with the file).
(in the top-right corner of the filing record)	A Locked icon ( ) is displayed in the top-right corner of the filing when the filing is marked confidential. If no icon is displayed, the filing is non-confidential. Depending on the state, a confidential case, filing, or document is typically available only to judges and clerks within their respective jurisdictions, an attorney on the case, a self-represented litigant (SRL) on the case, and a party on the case.
(on the document row)	A Locked icon ( ) is displayed on the document row when the document is marked confidential. Depending on the state, a confidential case, filing, or document is typically available only to judges and clerks within their respective jurisdictions, an attorney on the case, a self-represented litigant (SRL) on the case, and a party on the case.
(on the document row)	A Gavel icon ( ) is displayed when the document is sealed. Depending on the state, a sealed case or document is typically visible only to judges and clerks within their respective jurisdictions.

Field/Option	Description
⋮ **(in the top-right corner of the filing record)**	On the More Options menu (⋮) in the top-right corner of the filing record, you can do the following: • Click **Mark as Confidential** to mark the filing as confidential. • Click **Mark as Non-confidential** to mark the filing as non-confidential. • Select **Add Document** to add a document to the filing. • Select **Edit Filing** to edit the filing. • Select **Delete Filing** to delete the filing. These functions are available only to clerk admins within their jurisdictions and only for cases in non-integrated locations.
⋮ **(on the document row)**	On the More Options menu (⋮) on the document row, you can do the following: • Select **Mark as Sealed** to mark the document as sealed. • Select **Mark as Confidential** to mark the document as confidential. • Select **Mark as Non-confidential** to mark the document as non-confidential. • Select **Replace Document** to replace the document. • Select **Delete Document** to remove the document from the filing. These functions are available only to clerk admins within their jurisdictions and only for cases in non-integrated locations.

Viewing and Purchasing Documents

On the *Case Details* page and the *Filing Details* page, you can open documents that you already own or have free access to. If you are required to purchase a document first, you can add the document to your shopping cart, complete the purchase transaction, and then return to the *Case Details* page or the *Filing Details* page to open the document.

Documents are either free or available for purchase, depending on your re:Search user profile, your relationship to the case, your jurisdiction, or any combination of these factors as determined by your state. In some instances, a document may not be available because it has been marked as confidential or sealed by the state or a judge's order.

Note: Depending on your state, purchases may expire after a predetermined number of days. When a purchase expires, you can no longer view the document. To view the document, you must purchase it again. For more information, contact the clerk's office.

To view or purchase documents:

1. Access the *Case Details* page for the case with the documents that you want to view.

2. View or purchase documents as follows.

   Note: If the Add button is displayed on the document row, you need to purchase the document before you can view it.

Option	Description
To view a document that is free or that you already own:	a. Click the document name to view the document. Depending on the file type, your browser, and the type of personal computer (PC) or device that you are using, the document opens in a new browser tab, opens in a new window, or is downloaded to your PC or device and then opens. If the document does not open automatically, check your Downloads folder. b. Repeat for each document that you want to view.
To purchase individual documents:	a. Click **Add** to add a document to your shopping cart. The **Add** button changes to a **Remove** button to indicate that you have added the document to your shopping cart. If you decide not to purchase the document, click **Remove** to remove the document from the shopping cart. b. Repeat for each document that you need to purchase. c. After you finish adding documents to the shopping cart, continue with the next step to finish purchasing the documents.
To purchase all documents on the case:	a. Click **Add All** to add all documents on the case to your shopping cart. b. Continue with the next step to finish purchasing the documents.

3. Click the Shopping Cart icon ( ).

   The *Shopping Cart* page opens.
4. Review the documents in the **Shopping Cart** section. Documents are grouped by case.

   The following options are available for each document:

   - To remove a document, click **Remove**.
   - To preview the document, click the document name.
5. Review the order summary in the **Buy Documents** section.
6. Review the selected payment method in the **Buy Documents** section.

   The following options are available:

   - To choose a different payment method, select it from the **Payment Method** drop-down list.
   - To add a new payment method, click **Add a Payment Method**.
7. Optional: Type a client reference number (1 to 40 alphanumeric characters) in the **Client Reference Number** field.

   Note: After you complete your purchase, you can use this client reference number to locate documents on your *My Purchases* page.
8. Click **Buy Documents**.

   If your purchase is successful, the *Purchase Successful* page opens.

9. To view or print an invoice for the purchase, click **View or Print Invoice**.

   Depending on your browser, the invoice opens in a new browser tab or window.

10. To view a purchased document, use one of the following options:

    - Click the document name on the *Purchase Successful* page.
    - Return to the *Case Details* page or the *Filing Details* page that you accessed in Step 1, and then click the document name.
    - Access the *My Purchases* page, click the order number to open the *Order Details* page, and then click the document name.

    Depending on the file type, your browser, and the type of PC or device that you are using, the document opens in a new browser tab, opens in a new window, or is downloaded to your PC or device and then opens. If the document does not open automatically, check your Downloads folder.

    Note: In non-integrated court locations, re:Search retrieves the document from its own database. In integrated court locations, re:Search retrieves the document directly from the court's case management system (that is, the clerk's office). If this process takes more than a few seconds, the following message may be displayed:

8 Search Alerts

Topics covered in this chapter

re:Search allows you to create search alerts for cases, filings, and documents. When you create a search alert, re:Search notifies you by email whenever any case, filing, or document that matches your specified search criteria is added to re:Search.

Search Alerts Page

The *Search Alerts* page lists all of the search alerts that you have added. You can access the *Search Alerts* page from the re:Search menu (☰).

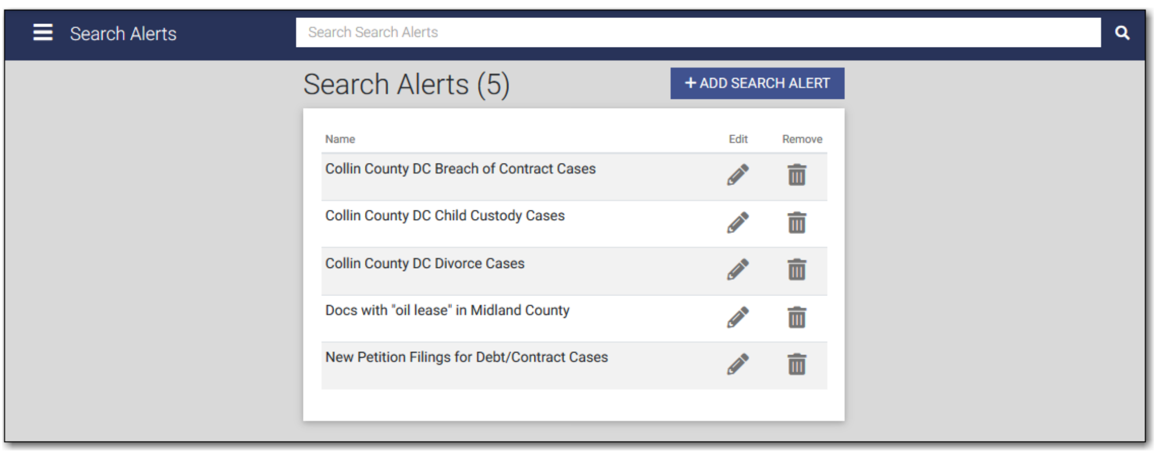
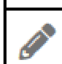


Figure 8.1 – Search Alerts Page

Search Alerts Page Options

The *Search Alerts* page includes the following options.

Option	Description
Search Search Alerts	To search for a specific search alert, type the full or partial name in the **Search Search Alerts** field, and then click **Search** or press ENTER. The page refreshes to display matching search alerts. Alternate spellings are included in the search.
Add Search Alert	Click this button to set a new search alert.
	Click this icon to view or edit details about the search alert.

Option	Description
	Click this icon to remove a search alert.
First, Previous, 1, 2, ..., Next, Last	Use these navigation buttons to browse through your search alerts.

Adding and Editing Search Alerts

You can add a new search alert or edit an existing search alert at any time.

To add or edit a search alert:

1. Access the *Search Alerts* page from the re:Search menu ().
2. Do one of the following:
    - To add a new search alert, click **Add Search Alert**.
    - To edit an existing search alert, click the Edit icon () on the row for the search alert that you want to edit.

   The *Add Search Alert* or *Edit Search Alert* page opens.
3. Complete or update the fields.
4. Click **Save**.

Search Alert Fields

Use the *Add/Edit Search Alert* page to specify the search criteria for a search alert.

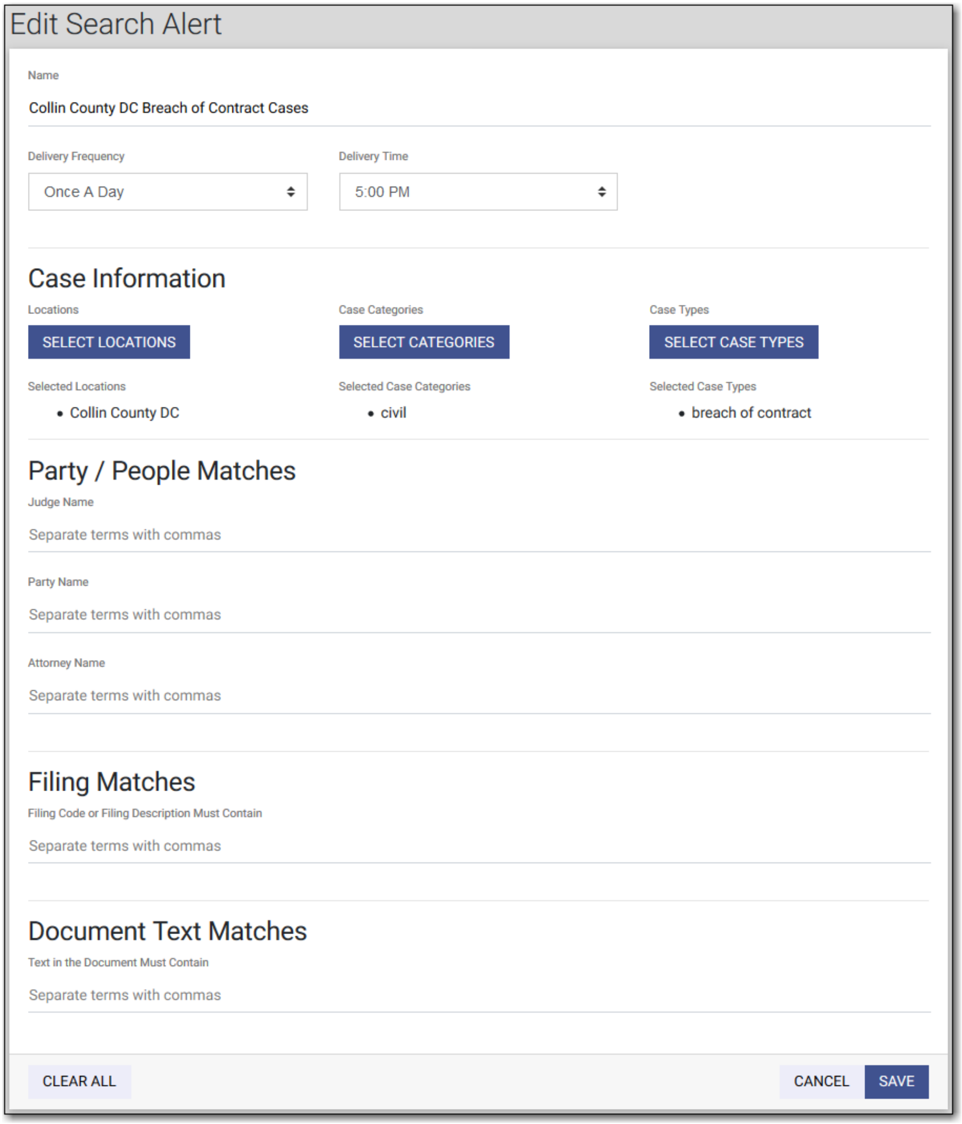


Figure 8.2 – Edit Search Alert Page

Note: Except for the Name field and the Delivery fields, all fields are optional.

The *Add/Edit Search Alert* page includes the following fields.

Area or Field	Description
Name	Type a name for the search alert.
Delivery Frequency	Use the **Delivery Frequency** drop-down list to select when or how often you want to receive notifications. Depending on the frequency that you select, additional fields for the day and time will be displayed. Select one of the following options: • Instantly • Once A Day • Once A Week • Once A Month
Delivery Day Of Week	**Note: This drop-down list is displayed when you select Once A Week from the Delivery Frequency drop-down list.** Select the day of the week that you want to receive notifications.
Delivery Day	**Note: This drop-down list is displayed when you select Once A Month from the Delivery Frequency drop-down list.** Select the day of the month that you want to receive notifications.
Delivery Time	**Note: This drop-down list is displayed when you select Once A Day, Once A Week, or Once A Month from the Delivery Frequency drop-down list.** Select the time of day that you want to receive notifications.
Locations	Click **Select Locations** to select one or more court locations to include in the search criteria. If you do not select any locations, re:Search will consider all locations.
Case Categories	Click **Select Categories** to select one or more case categories to include in the search criteria.
Case Types	Click **Select Case Types** to select one or more case types to include in the search criteria.
Judge Name	If you want to associate the search alert with specific judges, type their names in this field. Separate the names with commas.
Party Name	If you want to associate the search alert with specific parties or participants, type their names in this field. Separate the names with commas.
Attorney Name	If you want to associate the search alert with specific attorneys, type their names in this field. Separate the names with commas.

Area or Field	Description
Filing Matches	Use this field to include filing codes or filing descriptions in the search alert. Separate the filing codes or filing descriptions with commas.
Document Text Matches	Use this field if you want the search alert to look for specific text within documents. If you type two or more phrases, separate them with commas. In addition, this field supports advanced search operators as described in the next table.

The **Document Text Matches** field supports the following search operators.

Operator	Example	Description
" "	"CC-18-5512-001"	The results must contain exact matches.
AND	probate AND will	The results must contain both “probate” and “will.”
OR	affidavit OR testimony	The results must contain either “affidavit” or “testimony,” but not both.
NOT	civil NOT probate	The results must contain “civil,” but not “probate.”
*	Jon*	Use an asterisk (*) as a wildcard at the end of a search term. In this example, use “Jon*” to search for “Jon,” “Jonathon,” or “Jonathan.”
“ “~n	“pay structure”~2	Find matches that have “pay” and “structure” no more than two words apart. You must specify at least two keywords in quotation marks.

Removing Search Alerts

You can remove a search alert at any time.

To remove a search alert:

1. Access the *Search Alerts* page from the re:Search menu ( ).
2. On the row for the search alert that you want to remove, click the Remove icon ( ).

   A confirmation message opens, asking you to confirm that you want to remove the search alert.
3. Click **Remove**.

The search alert is removed from the *Search Alerts* page.

9 Case Alerts

Topics covered in this chapter

re:Search allows you to set an alert on a case. When you set an alert on a case, re:Search sends you an email whenever someone files into the case or whenever a hearing is scheduled for the case. The email includes the case description and number, the location, details about the filing or hearing, and a link to the case.

The Case Alert icon (or) is used as follows to set or remove a case alert and to indicate whether a case alert is currently set:

- The Case Alert icon appears white () when a case alert is not currently set on the case. To set a case alert, click the icon.
- The Case Alert icon appears dark () when a case alert is set on the case. To remove a case alert, click the icon.

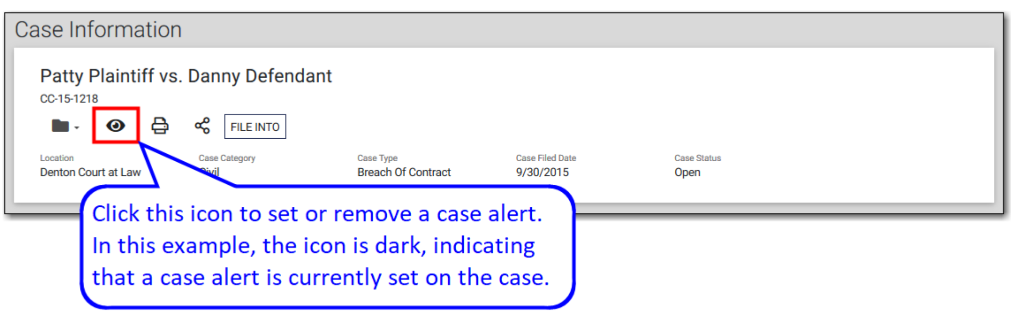


Figure 9.1 – Case Alert Icon on Case Details Page

The Case Alert icon (or) is available on the following pages in re:Search:

- *Case Alerts* page
- *Case Details* page for a case
- *Filing Details* page for a filing

Case Alerts Page

The *Case Alerts* page lists all of the cases on which you have set case alerts. You can access the *Case Alerts* page from the re:Search menu ().

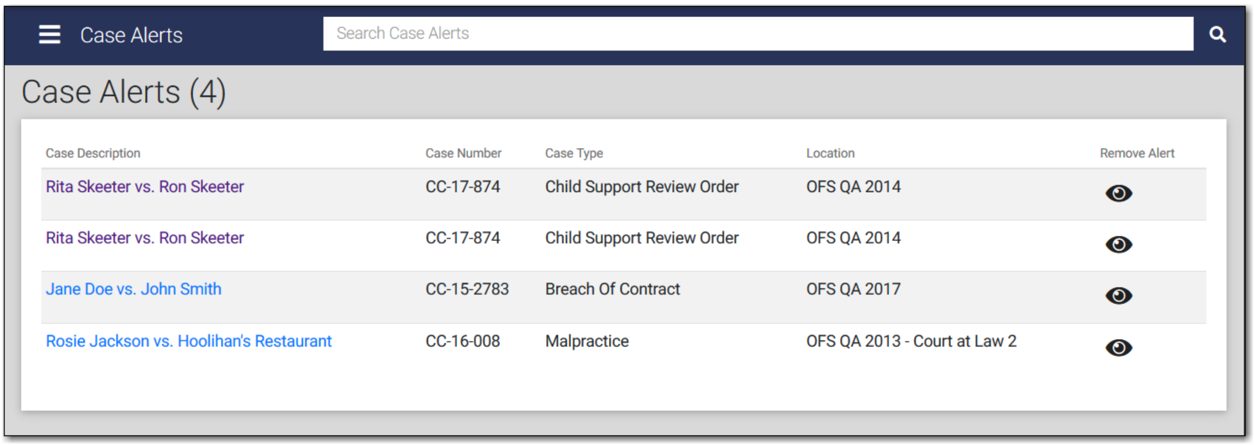


Figure 9.2 – Case Alerts Page

Case Alerts Page Details

The *Case Alerts* page displays the following information for each case alert.

Column	Description
Case Description	The case description is the name or title of the case. Click the case description to display the *Case Details* page for the case. **Note: If a case description is not available for any reason, re:Search uses the case number for the case description.**
Case Number	The case number is the number assigned to the case by the court.
Case Type	The case type is the type of case within the case category.
Location	The location is the court to which the case is assigned.
Remove Alert	A dark Case Alert icon () is displayed for each case.

Case Alerts Page Options

The *Case Alerts* page includes the following options.

Option	Description
View Case Details	Click any case description to open the *Case Details* page for that case.
Search Case Alerts	To search for a specific case, enter search criteria in the **Search Case Alerts** field, and then click **Search**.
Remove Case Alerts	Click the dark Case Alert icon ( ) to remove the case alert. The icon changes to a white Case Alert icon ( ) to indicate that you removed the case alert. To give you time to set the case alert again in case you clicked the icon by mistake, the case remains displayed on the *Case Alerts* page until you refresh or leave the page.
First, Previous, 1, 2, ..., Next, Last	Use the navigation buttons to browse through your case alerts.

Setting a Case Alert

If you would like re:Search to notify you by email whenever someone files into a particular case, you can set a case alert on that case.

You can use one of the following methods to set a case alert.

Option	Steps
To use the *Case Details* page to set a case alert:	1. Access the *Case Details* page for the case. 2. In the **Case Information** section, click the white Case Alert icon ( ).
To use the *Filing Details* page to set a case alert:	1. Access the *Filing Details* page for any filing attached to the case. 2. In the **Case Information** section, click the white Case Alert icon ( ).

The icon changes to a dark Case Alert icon ( ) to indicate that you set a case alert on the case.

Removing a Case Alert

You can remove a case alert from a case at any time.

You can use one of the following methods to remove a case alert.

Option	Steps
To use the *Case Alerts* page to remove a case alert:	1. Access the *Case Alerts* page from the re:Search menu (☰). 2. Locate the case. 3. In the **Remove Alert** column, click the dark Case Alert icon (👁).
To use the *Case Details* page to remove a case alert:	1. Access the *Case Details* page for the case. 2. In the **Case Information** section, click the dark Case Alert icon (👁).
To use the *Filing Details* page to remove a case alert:	1. Access the *Filing Details* page for any filing attached to the case. 2. In the **Case Information** section, click the dark Case Alert icon (👁).

The icon changes to a white Case Alert icon (👁) to indicate that there is no longer a case alert set on the case.

10 Name Alerts

Topics covered in this chapter

re:Search allows you to set an alert on the name of a party, attorney, or judicial officer.

When you set a name alert, re:Search notifies you by email whenever the name is added to a case. The email includes the case description and number and a link to the case.

Name Alerts Page

The *Name Alerts* page lists all of the names on which you have set an alert. You can access the *Name Alerts* page from the re:Search menu ().

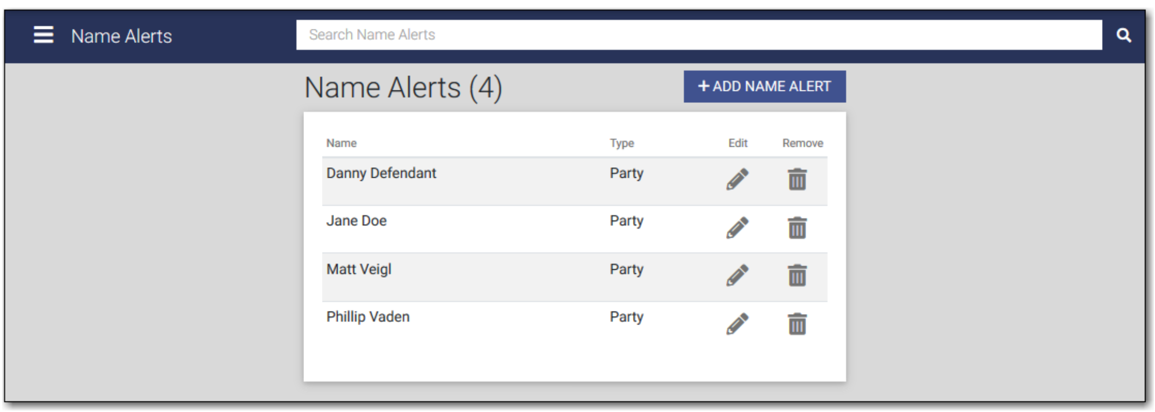


Figure 10.1 – Name Alerts Page

The *Name Alerts* page includes the following options.

Option	Description
Search Name Alerts	To search for a specific name, type a full or partial name in the **Search Name Alerts** field, and then click **Search** or press ENTER. The page refreshes to display matching names. Alternate spellings are included in the search.
Add Name Alert	Click this button to open the *Name Alert* dialog box to set a new name alert.
	Click this icon to view or edit details about the name alert, including any alternate spellings.

Option	Description
	Click this icon to remove a name alert.
First, Previous, 1, 2, ..., Next, Last	re:Search can display up to 10 name alerts at a time. If you have created more than 10 name alerts, these navigation buttons are displayed to help you browse through your name alerts.

Adding a Name Alert

If you would like re:Search to notify you by email whenever someone adds a specific party, attorney, or judicial officer to a case, you can create an alert for the name. The name can be a person's name or the name of a business or law firm.

Use one of the following options to add a new name alert:

Option	Steps
To add a name alert from the *Name Alerts* page:	1. Access the *Name Alerts* page from the re:Search menu (). 2. Click **Add Name Alert**. The *Name Alert* dialog box opens. 3. Complete the fields. 4. Click **Save**.
To add a name alert from the *Case Details* page for a case:	1. Access the *Case Details* page for the case. 2. Click the name of the party, attorney, or judicial officer to open the Name Options menu, and then click **Name Alert**. The *Name Alert* dialog box opens with the name of the party, attorney, or judicial officer already displayed in the **Name** field and the appropriate type selected in the **Type** drop-down list. 3. Complete the fields. 4. Click **Save**.
To add a name alert from the *Filing Details* page for a filing: **Note: This option works only if you are adding a name alert for a judicial officer.**	1. Access the *Filing Details* page for the case. 2. Click the name of the judicial officer to open the Name Options menu, and then click **Name Alert**. The *Name Alert* dialog box opens with the name of the judicial officer already displayed in the **Name** field and the value **Judge** selected in the **Type** drop-down list. 3. Complete the fields. 4. Click **Save**.

Name Alert Fields

Use the *Name Alert* dialog box to add or edit a name alert.

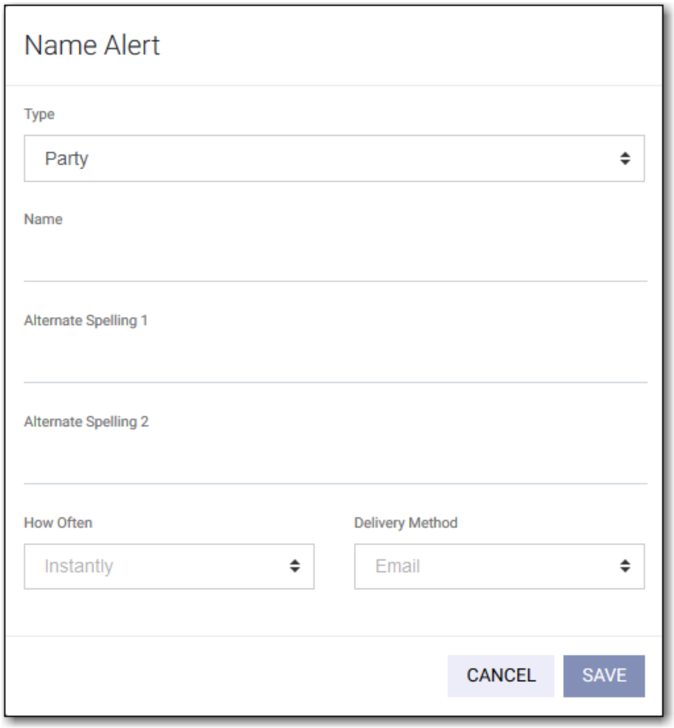


Figure 10.2 – Name Alert Dialog Box

The *Name Alert* dialog box includes the following fields.

Field	Description
Type	Select whether you are setting a name alert for a party, an attorney, or a judge.
Name	Type the name of the party, attorney, or judicial officer. If you selected the name from the *Case Details* page, the name is already displayed. The name can be a person's name or the name of a business or law firm.
Alternate Spelling 1/ Alternate Spelling 2	Use these fields to enter alternate spellings or known misspellings of the name entered in the **Name** field. These fields are optional.
How Often	This field indicates when or how often notifications are sent. Currently, the only option for this field is **Instantly**.
Delivery Method	This field indicates how notifications are sent. Currently, only email notifications are supported.

Editing a Name Alert

You can edit details about an existing name alert at any time.

To edit details for a name alert:

1. Access the *Name Alerts* page from the re:Search menu ().
2. On the row for the name alert that you want to edit, click the Edit icon ().

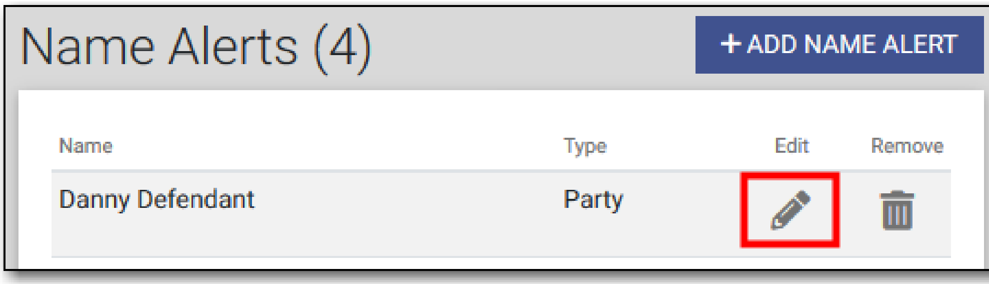


Figure 10.3 – Edit Icon on Name Alerts Page

The *Name Alert* dialog box opens.

3. Update the fields as required.
4. Click **Save**.

Your changes to the name alert are saved.

Name Alert Fields

Use the *Name Alert* dialog box to add or edit a name alert.

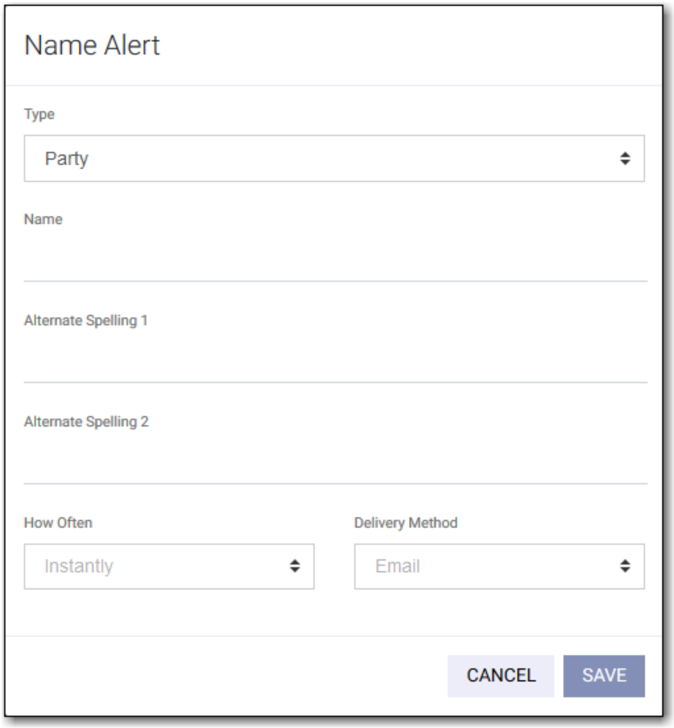


Figure 10.4 – Name Alert Dialog Box

The *Name Alert* dialog box includes the following fields.

Field	Description
Type	Select whether you are setting a name alert for a party, an attorney, or a judge.
Name	Type the name of the party, attorney, or judicial officer. If you selected the name from the *Case Details* page, the name is already displayed. The name can be a person's name or the name of a business or law firm.
Alternate Spelling 1/ Alternate Spelling 2	Use these fields to enter alternate spellings or known misspellings of the name entered in the **Name** field. These fields are optional.
How Often	This field indicates when or how often notifications are sent. Currently, the only option for this field is **Instantly**.
Delivery Method	This field indicates how notifications are sent. Currently, only email notifications are supported.

Removing a Name Alert

You can remove a name alert at any time.

To remove a name alert:

1. Access the *Name Alerts* page from the re:Search menu ().
2. On the row for the name alert that you want to remove, click the Remove icon ().

Figure 10.5 – Remove Icon on Name Alerts Page

A confirmation message opens, asking you to confirm that you want to remove the name alert.

3. Click **Remove**.

The name alert is removed from the *Name Alerts* page.

11 My Folders

Topics covered in this chapter

You can create personalized folders to help organize your cases and provide quick access to those cases.

Folders are arranged in alphabetical order on the **My Folders** card on the *Dashboard*.

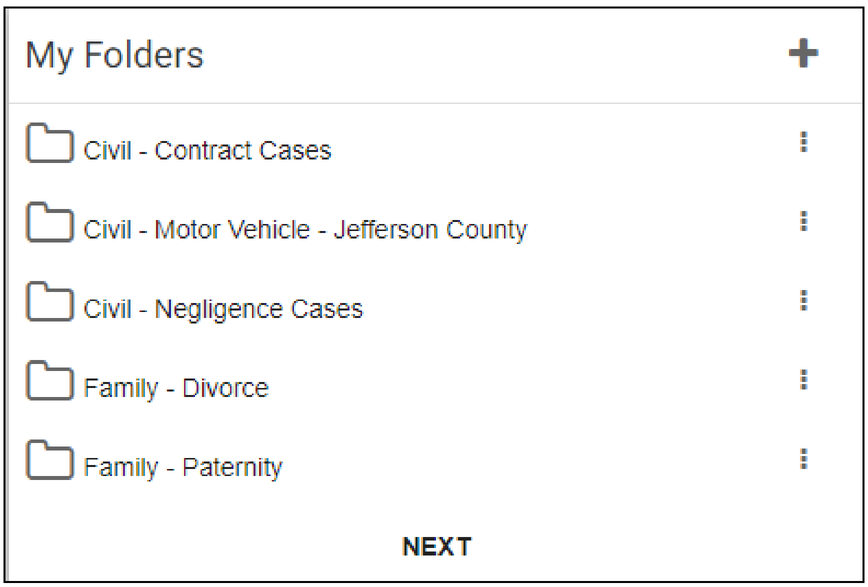


Figure 11.1 – My Folders Card

The following options are available on the **My Folders** card.

Option	Description
+	Click the Add icon to add a new folder.
⋮	Click the More Options menu to edit or delete a folder.
Folder Name	Click the folder name to open a folder.
Previous / Next	Click these buttons to move through your folders. These buttons are displayed only if the list of folders is more than one page long.

Adding a Folder

Folders can be added directly from the **My Folders** card on the *Dashboard*.

Note: You can also create a new folder from the *Case Detail* page or the *Filing Detail* page. Refer to the "Adding Cases to Folders" for more information.

To add a folder from the **My Folders** card:

1. Click +.
2. Type a name for the folder in the **New Folder Name** field.
3. Click , or press ENTER.

The new folder is now displayed on the **My Folders** card.

Renaming a Folder

You can rename a folder on the **My Folders** card on the *Dashboard*.

To rename a folder:

1. On the **My Folders** card, locate the folder that you want to rename.
2. Click , and then click **Edit**.
3. Change or overwrite the folder name.
4. Click , or press ENTER.

The folder is displayed with the new name on the **My Folders** card.

Deleting a Folder

If you no longer need a folder, you can easily delete it.

To delete a folder:

1. On the **My Folders** card, locate the folder that you want to delete.
2. Click , and then click **Delete**.

   A message is displayed, asking you to confirm that you really want to delete the folder.
3. Click **Delete**.

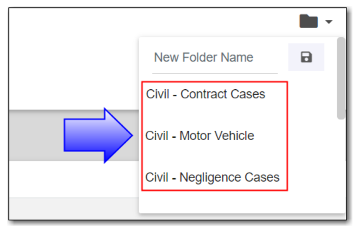
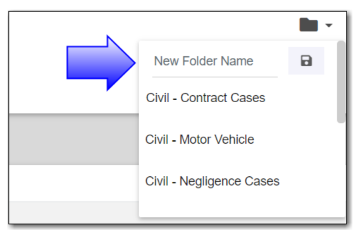
The folder is removed from the **My Folders** card.

Adding Cases to Folders

You can add cases to folders in the **Case Information** section on the *Case Details* page or the *Filing Details* page.

To add a case to a folder:

1. Access the *Case Details* page for the case, or access the *Filing Details* page for one of the filings for the case.
2. Do one of the following:

Option	Description
To save the case to an existing folder:	a. In the **Case Information** section, click **Save to Folder**. b. Select an existing folder from the list of folders. 
To create a new folder and save the case to the new folder:	a. In the **Case Information** section, click **Save to Folder**. b. Type the folder name in the **New Folder Name** field.  c. Either click , or press ENTER.

The case is now saved in the folder you selected or created, and the **Save to Folder** button is replaced with the name of the folder.

Removing Cases from Folders

You can remove a case from a folder using either the folder itself or the **Case Information** section on the *Case Details* page or the *Filing Details* page.

To remove a case from a folder:

1. Choose one of the following options to remove a case from a folder:

Option	Description
To remove a case from a folder by using the folder itself:	a. On the **My Folders** card, click the folder containing the case. b. Click next to the case that you want to remove. 
To remove a case from a folder by using the Case Information section on the *Case Details* page or the *Filing Details* page:	a. Access the *Case Details* page for the case, or access the *Filing Details* page for one of the filings for the case. b. In the **Case Information** section, click the folders menu (which currently shows the name of the folder in which the case is saved), and then click **Remove from folder**. 

The case is removed from the folder.

12 Shopping Cart

Topics covered in this chapter

- ♦ Shopping Cart Page
- ♦ Order Details Page
- ♦ Receipt Page

In states that allow document purchases, the shopping cart is where you review the documents that you want to purchase and then complete the transaction.

To access the *Shopping Cart* page, click the Shopping Cart icon ( ) at the top of the re:Search window. For instructions on how to complete your purchase, refer to Viewing and Purchasing Documents, page 63.

Note: In states where documents are free for all users, the various shopping cart-related pages, icons, and buttons described in this chapter are not available.

Shopping Cart Page

The *Shopping Cart* page is where you review the documents that you have added to your shopping cart and then complete your purchases.

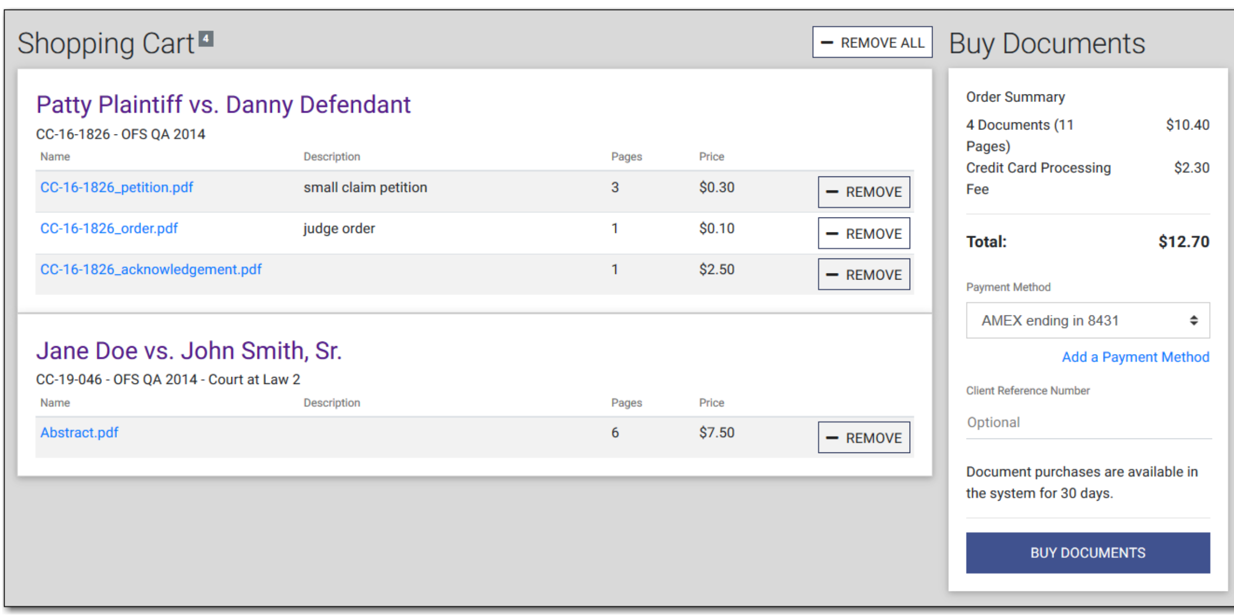


Figure 12.1 – Shopping Cart Page

Shopping Cart Section

The **Shopping Cart** section on the *Shopping Cart* page lists the documents that you intend to purchase. Purchases are grouped by case.

Field	Description
Case Description, Number, and Location	The case description, case number, and court location are displayed for each case. Click the case description to display the *Case Details* page for the case.
Name	This field displays the file name of the document. Click the file name to display a preview of the document.
Description	This field displays a brief description of the document as provided by the filer.
Pages	This field shows the length of the document.
Price	This field shows the price of the document. **Note: The state determines the pricing structure.**
Remove	Click **Remove** on the document row to remove the document from the shopping cart.
Remove All	Click **Remove All** at the top of the **Shopping Cart** section to remove all documents for all cases from the shopping cart.

Buy Documents Section

The **Buy Documents** section on the *Shopping Cart* page displays a brief summary of the charges, the payment method to be used for the purchases, and the **Buy Documents** button. This section also allows you to add a client reference number to associate with the purchases.

Field	Description
Order Summary	The order summary lists the total number of documents and pages being purchased, any additional fees, and the total charges.
Payment Method	This field shows the payment method to be used for the purchases. Use the **Payment Method** drop-down list to select a different payment method, or click **Add a Payment Method** to define a new payment method.
Client Reference Number	Use this field to associate a client reference number with the purchased documents. You can then search for and sort by this number on the *My Purchases* page. This field is optional.
Buy Documents	Click **Buy Documents** to complete your purchase.

Order Details Page

The *Order Details* page displays the documents and other details for a specific order.

To view the *Order Details* page for an order, first access the *My Purchases* page, and then click the order number.

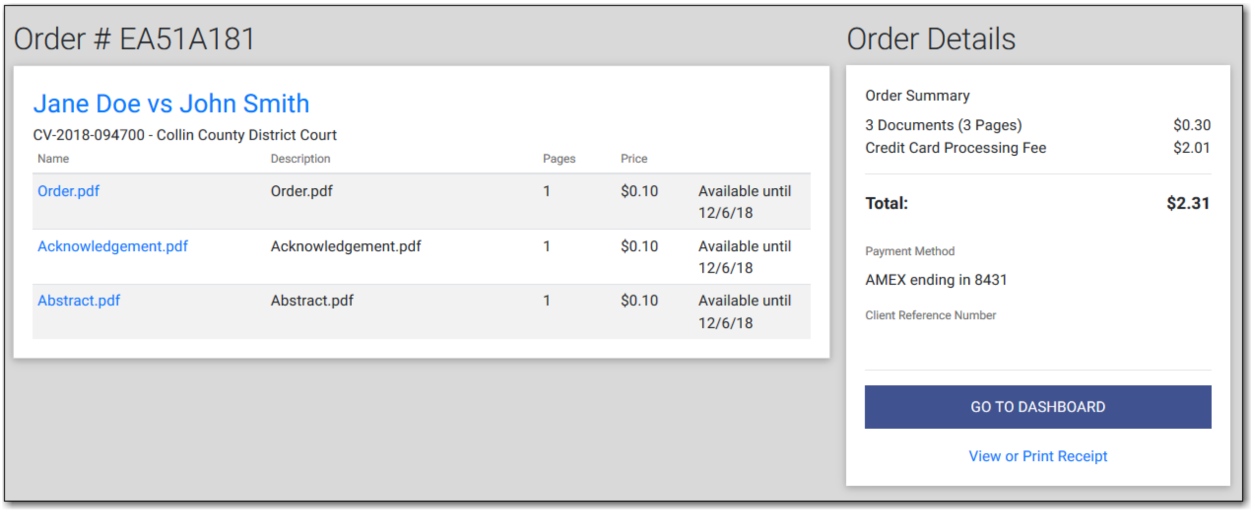


Figure 12.2 – Order Details Page

Documents Purchased Section

The **Documents Purchased** section on the *Order Details* page lists the documents that you purchased. The documents are grouped by case.

The following information is included for each case or document.

Field	Description
Case Description	The case description is the name or title of the case. Click the case description to display the *Case Details* page for the case.
Case Number and Location	The case number and location are displayed directly below the case description. The case number is the number assigned to the case by the court, and the location is the court to which the case is assigned.
Name	This field displays the file name of the document. Click the file name to view the document.
Description	This field displays a brief description of the document as provided by the filer.
Pages	This field displays the length of the document.
Price	This field displays the price of the document. **Note: The state determines the pricing structure.**
Owned / **Available until <mm/dd/yy>**	The designation `Owned` is displayed to indicate that you now own the document. If you purchased the document in a state that requires all document purchases to expire after a certain number of days, the designation `Available until <mm/dd/yy>` is displayed, where <mm/dd/yy> is the purchase expiration date for the document.

Order Details Section

The **Order Details** section on the *Order Details* page displays a brief summary of your order as well as links to the *Dashboard* and to a copy of your invoice.

Field	Description
Order Summary	The order summary lists the total number of documents and pages that you purchased, any additional fees, and the total charges.
Payment Method	This field displays the payment method that you used for the purchases.
Client Reference Number	This field displays the client reference number that you specified. If you did not specify a client reference number, this field is empty. You can search for and sort by the client reference number on the *My Purchases* page.
Go to Dashboard	Click this button to access the *Dashboard*.
View or Print Receipt	Click this button to view and print your receipt. Depending on your browser, the *Receipt* page will open in a new browser tab or window.

Receipt Page

The *Receipt* page is your purchase receipt. It provides a summary of your order that you can print or save to a file for your personal records. To open the *Receipt* page, first access the *Order Details* page, and then click **View or Print Receipt**.

re:Search

Receipt for Order 3083DFCE

Order Date: 12/26/2017
Order Number: 3083DFCE
Client Reference Number:
Documents: 2 (12 Pages)
Order Total: $1.53
Document Purchases are Available Until: 1/25/2018

Documents Purchased	**Price**
1. InitialFiling one QA1-SOAPtest.pdf Jane Doe, IIIv.John Smith, III OFS QA 2017	$0.60
2. InitialFiling one QA1-SOAPtest.pdf Jane Doe MD vs. John Smith MD OFS QA 2013	$0.60

2 Documents: $1.20
Credit Card Processing Fee: $0.33
Total: $1.53

Payment Method
AMEX ending in 8431

User
pushpin@tylertech.com

Credit Card Transaction
AMEX ending in 8431: 12/26/2017: $1.53

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Figure 12.3 – Receipt Page

13 My Account

Topics covered in this chapter

- ♦ My Account Page
- ♦ My Subscription Activity Page
- ♦ Changing Your E-Filing Service Provider
- ♦ Renewing Your Subscription
- ♦ Canceling Your Subscription
- ♦ Adding a Payment Method

This chapter describes the *My Account* page and provides instructions for maintaining your account.

Note: Procedures for managing your password are provided in the "Getting Started" chapter.

My Account Page

Use the *My Account* page to manage your account, subscriptions (if your state supports subscription services), and payment methods (if you are required to purchase documents in your state). The options available on the *My Account* page vary by user role and location.

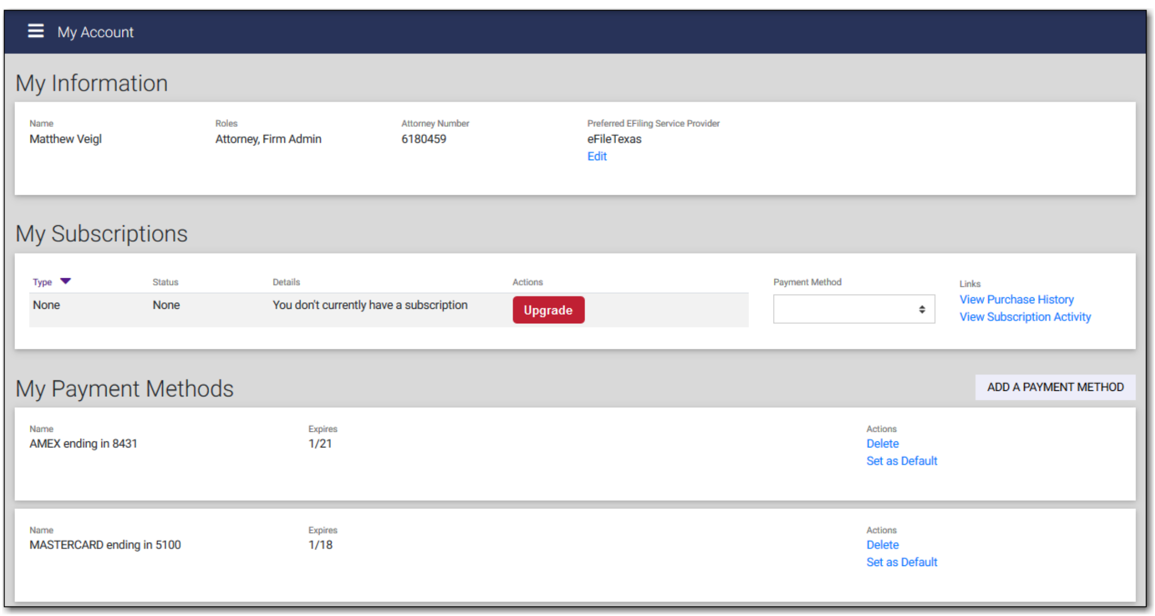


Figure 13.1 – My Account Page for Non-Subscriber

To open the *My Account* page, select **My Account** from the re:Search menu (☰).

My Information Section

The **My Information** section on the *My Account* page provides basic information about you and identifies your preferred e-filing service provider.

Field	Description
Name	This field identifies the email address associated with your account.
Roles	This field lists your assigned user roles. Your roles determine which tasks you can perform and the type of information you can modify or view.
Locations	This field lists the locations within your jurisdiction.
Preferred EFiling Service Provider	This field identifies your preferred e-Filing service provider. Click **Edit** to select a new provider. **Note: If your site supports only one e-filing service provider, this field is not displayed.**

My Subscriptions Section

The **My Subscriptions** section on the *My Account* page lets you view the status of your subscriptions and renewal dates, and perform basic functions associated with your subscriptions.

Field or Button	Description
Type	When applicable, this field displays the type of subscription.
Status	This field displays the status of the subscription.
Details	This field displays the renewal date for your subscription or points out that you do not have a subscription.
Payment Method	This field identifies the payment method used to pay for your subscription. If you have more than one payment method for your account, you can select a different payment method from the drop-down list.
Disable Auto-Renew	Click this button to turn off auto-renew for the subscription. This is also how you cancel a subscription.
Enable Auto-Renew	Click this button to turn on auto-renew for the subscription. Once enabled, the subscription will be renewed automatically at the end of the current billing period.
Upgrade	Click this button to open the *Pricing* page and learn more about re:Search subscriptions. **Note: This button is not displayed if you are already a subscriber.**
Payment Method	This drop-down list displays the payment method used for the subscription. If you have more than one payment method registered with re:Search, you can click the drop-down list to select a different payment method.
Change Subscription	Click this button to open the *Pricing* page to change your subscription. **Note: This button is displayed if you are already a subscriber.**

Field or Button	Description
View Purchase History	Click this link to open the *My Purchases* page.
View Subscription Activity	Click this link to open the *My Subscription Activity* page.

My Payment Methods Section

Depending on your state, you may be required to purchase documents. The **My Payment Methods** section on the *My Account* page is where you maintain payment methods.

Field, Button, or Message	Description
Add a Payment Method	Click this button to add a new payment method.
Name	This field identifies the type of credit or debit card used for the payment method and the last four digits on the card. The indicator **(Default)** is displayed next to the default payment method. In the list of payment methods, the default payment method is always listed first. If the payment method is managed through your eFile™ or File & Serve™ personal account or firm account, that information is shown in parentheses. Example: `AMEX ending in 0005 (Efile Firm Account)`
Expires	This field displays the expiration date on the credit card or debit card.
Delete	Click this button to delete a payment method.
Set as Default	Click this button to set a new default payment method.
eFile Payment Method, manage in eFile	This message is displayed if the payment method is managed through your eFile or File & Serve personal account or firm account. The message will reference either eFile (as shown here) or File & Serve, depending on your location.

My Subscription Activity Page

Use the *My Subscription Activity* page to view your subscription activity.

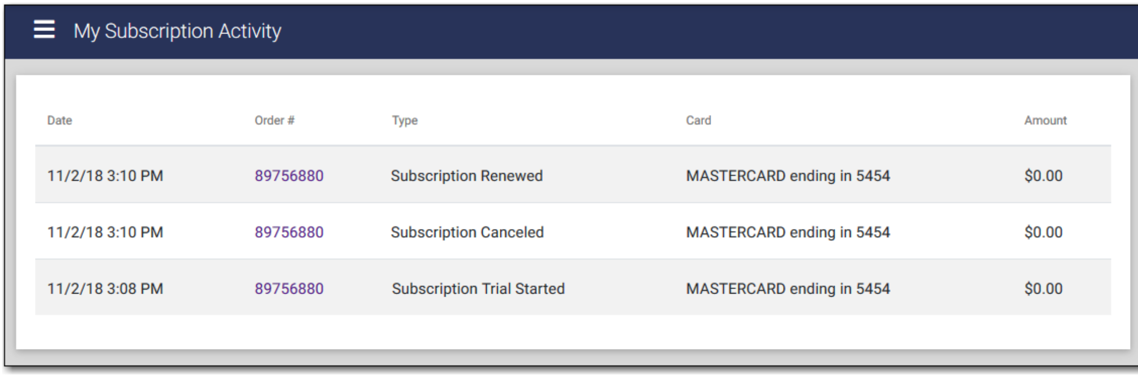


Figure 13.2 – My Subscription Activity Page

The following information is displayed for each activity.

Column	Description
Date	This column displays the date and time of the activity.
Order #	This column displays the order number. Click the order number to display your receipt for the order.
Type	This column displays the activity type. The following activity types are possible for subscriptions: • Subscription Trial Started • Subscription Canceled • Subscription Renewed • Subscription Expired
Card	This column displays the type of credit/debit card and the last four digits of the card number used to purchase the subscription.
Amount	This column displays the amount you paid for the subscription.

Changing Your E-Filing Service Provider

If your site supports two or more e-filing service providers, you can change your preferred e-filing service provider at any time.

To change your e-filing service provider:

1. Click , and then click **My Account**.

   The *My Account* page is displayed.

2. In the **My Information** section, below the **Preferred EFiling Service Provider** field where your current e-filing service provider is displayed, click **Edit**.

Note: If your site supports only one e-filing service provider, the Preferred EFiling Service Provider field is not displayed.

The *Choose Preferred EFiling Service Provider* dialog box is displayed.

3. Select your new e-filing service provider from the drop-down list.
4. Click **Save**.

Your new preferred e-filing service provider is now displayed in the **My Information** section.

Renewing Your Subscription

You can renew an expired or canceled subscription at any time by enabling auto-renew. When you enable auto-renew, the subscription will be reactivated immediately and will be renewed automatically at the end of each billing period.

To renew a subscription:

1. Click ☰, and then click **My Account**.

   The *My Account* page is displayed.

2. In the **My Subscriptions** section, click **Enable Auto-Renew** for the subscription that you want to renew.

   A confirmation message is displayed.

3. Click **Enable Auto-Renew** to finish renewing your subscription.

   re:Search sends you an email confirming that you renewed your subscription or that it will be renewed at the end of the current billing period.

Canceling Your Subscription

You can cancel a subscription at any time, but the cancellation will not go into effect until the end of your current billing period.

To cancel a subscription:

1. Click ☰, and then click **My Account**.

   The *My Account* page is displayed.

2. In the **My Subscriptions** section, click **Disable Auto-Renew** for the subscription that you want to cancel.

   A message is displayed, asking why you are disabling auto-renew for your subscription. The message displays a list of common reasons.

3. Select your reason from the list, or select **Other** and then type your own reason in the space provided.
4. Click **Disable Auto-Renew**.

   re:Search sends you an email confirming that your subscription will be canceled at the end of the current billing period.

Adding a Payment Method

To purchase documents, you must add at least one payment method. Adding a payment method means registering a credit card or debit card. If you need to use more than one credit card or debit card, you can add a separate payment method for each card.

To add a payment method:

1. Click , and then click **My Account**.

   The *My Account* page is displayed.
2. In the **My Payment Methods** section, click **Add a Payment Method**.

   The *Add Payment Method* dialog box is displayed.
3. Complete the fields.
4. Click **Continue**.

   A summary of your billing information is displayed for you to verify.
5. Click **Save Information**.

The new payment method is added to the **My Payment Methods** section.

14 Purchases

Topics covered in this chapter

- ♦ Viewing the Purchase History
- ♦ Filtering the Purchase History
- ♦ Exporting the Purchase History

You can view, filter, and export your purchase history on the *Purchases* page. If you are a firm user, you can also view purchases made by other members of your firm.

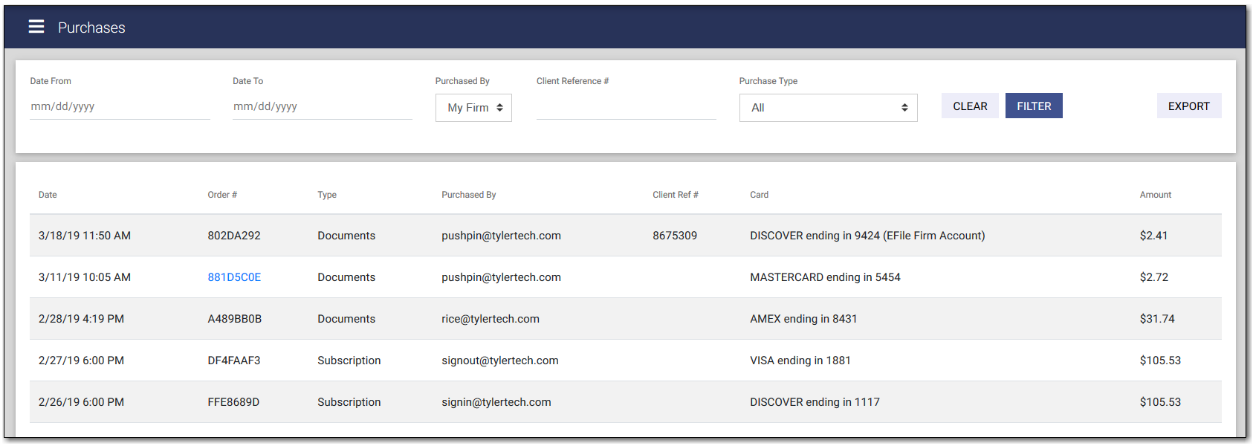


Figure 14.1 – Purchases Page

Purchases are listed in chronological order by purchase date (the newest purchases are listed first).

Viewing the Purchase History

Use the *Purchases* page to review your purchase history or your firm's purchase history.

To view the *Purchases* page:

1. Click the re:Search menu ().
2. Click **Purchases**.

The *Purchases* page opens.

Purchases Page Details

The *Purchases* page displays purchase details in columns.

The following information is displayed for each purchase.

Column	Description
Date	This column displays the date and time that you made the purchase.
Order #	This column displays the order number. Click the order number to display details about the order. If the order is for documents, clicking the order number displays the *Order Details* page for the order. If the order is for a subscription or subscription cancellation, clicking the order number displays the receipt.
Type	This column displays the purchase type. re:Search supports the following purchase types: • Documents • Subscription • Subscription Cancellation **Note: If your site does not support subscription purchases, the Documents type is the only available purchase type.**
Purchased By	This column displays the email address of the user who made the purchase.
Client Ref #	This column displays the client reference number that you provided when you purchased the document. This reference number is optional. **Note: Client reference numbers are applicable only to document purchases.**
Card	This column displays the type of credit/debit card and the last four digits of the card number used to make the purchase.
Amount	This column displays the amount you paid for the order.

Purchases Page Options

The *Purchases* page provides the following options.

Option	Description
Filter Options	Use the filter options at the top of the *Purchases* page to narrow the list of purchases to specific dates, client reference numbers, or purchase types. If you are a firm user, you can also use the **Purchased By** drop-down list to display only your purchases or all purchases made by the members of your firm. Click **Filter** to apply the filter options that you selected. Click **Clear** to remove or reset the filter options that you selected.
Export	Click this button to export the purchase history (with or without filtering) to a Microsoft® Excel® spreadsheet.
First, Previous, 1, 2, ..., Next, Last	Use these navigation buttons to browse through your purchases.

Filtering the Purchase History

You can filter the purchases listed on the *Purchases* page to display purchases made on or between certain dates or with specific client reference numbers or purchase types. If you are a firm user, you can also choose to display all purchases made by members of your firm. By default, only your own purchases are displayed when you first open the *Purchases* page.

To filter your purchase history:

1. Click on the re:Search menu (☰).

   The *Purchases* page opens.
2. Complete the **Date From**, **Date To**, **Purchased By**, **Client Reference #**, or **Purchase Type** fields, as applicable.
3. Click **Filter**.

Purchase History Filter Options

The *Purchases* page provides the following filter options, which you can apply in any combination.

Option	Description
Date From	Click this field to select a start date.
Date To	Click this field to select an end date. If you do not select an end date, the end date is the current date.
Client Reference #	Type a complete or partial reference number. If you type two or more reference numbers, separate them with a space. **Note: Client reference numbers are applicable only to document purchases.**

Option	Description
Purchased By	Use the **Purchased By** drop-down list to filter the purchase history by who made the purchase. You can select one of the following options: • **Me**—Select this option to display only your purchases. If you are not a firm user, this is the only option. • **My Firm**—Select this option to display all purchases, including your purchases, made by the members of your firm. This option is available only to firm users.
Purchase Type	Use the **Purchase Type** drop-down list to filter your purchase history by purchase type. You can select one of the following options: • All (default) • Documents • Subscription **Note: If your site does not support subscription purchases, the Documents type is the only available purchase type.**
Clear	Click this button to clear the filter criteria.
Filter	Click this button to apply the filter criteria.

Exporting the Purchase History

You can export the purchases listed on the *Purchases* page to a comma-separated values (CSV) file, which you can then open in a spreadsheet application.

Prerequisite: Your browser must be set up to allow pop-up windows.

To export the purchase history:

1. Access the *Purchases* page by clicking **Purchases** on the re:Search menu ().
2. If necessary, apply filters to narrow the list of purchases.
3. Click **Export**.

   re:Search exports the purchase history to a CSV file. Depending on your browser, you are then prompted to save the file or open it in a spreadsheet application.
4. Respond to your browser's prompt to view or save the file.

15 Document Sales

Topics covered in this chapter

You can view, filter, and export your location's document sales history on the *Document Sales* page.

Note: The *Document Sales* page is not available in locations that do not support document purchases.

Access the *Document Sales* page from the re:Search menu (☰).

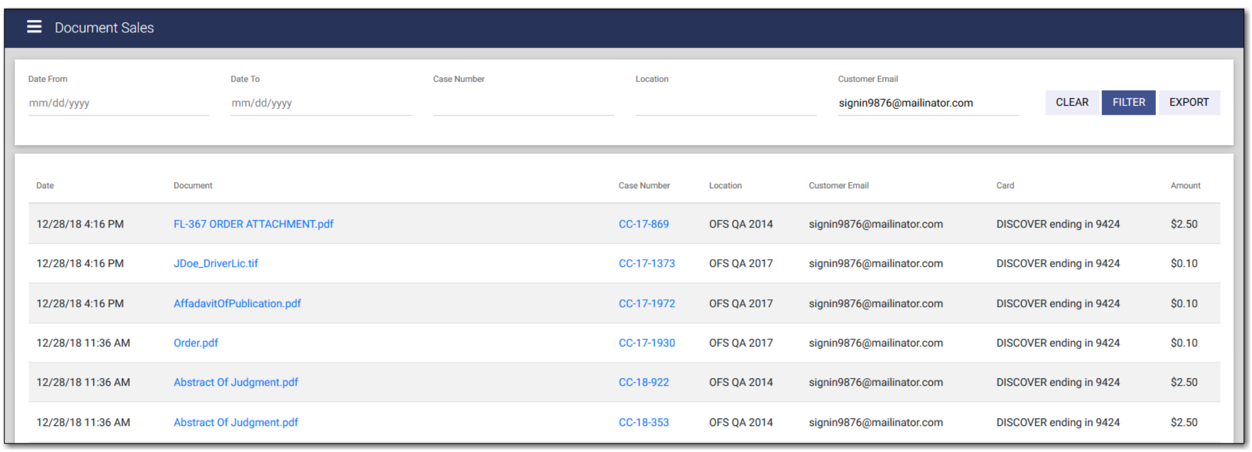


Figure 15.1 – Document Sales Page

Purchases are listed in chronological order by purchase date (newest purchases are listed first).

Viewing Document Sales

Use the *Document Sales* page to review your location's sales history.

To view the *Document Sales* page:

1. Click the re:Search menu (☰).
2. Click **Document Sales**.

The *Document Sales* page opens.

Document Sales Details

The *Document Sales* page displays details about each sale.

The following information is displayed for each sale.

Column	Description
Date	This column displays the date and time on which the document was purchased.
Document	This column displays the file name of the document that was purchased. Click the document name to view the document.
Case Number	This column displays the case number associated with the document. Click the case number to display the *Case Details* page for the case.
Location	This column displays the court or office from which the document was purchased.
Customer Email	This column displays the email address on the account used to purchase the document.
Card	This column displays the type of credit/debit card and the last four digits of the card number used to make the purchase.
Amount	This column displays the amount paid for the document.

Document Sales Options

The *Document Sales* page provides the following options.

Option	Description
Filter Options	Use the filter options at the top of the *Document Sales* page to narrow the list of purchases to specific dates, case numbers, locations, or users (using their email addresses).
Clear	Click this button to clear the filter options that you entered.
Filter	Click this button to apply the filter options that you entered.
Export	Click this button to export the purchase history (with or without filtering) to a comma-separated values (CSV) file, which you can then open in a spreadsheet application.
First	Click this button to view the first page of purchases.
Previous	Click this button to view the previous page of purchases.
1, 2, ...	Click one of these buttons to view a specific page of purchases.
Next	Click this button to view the next page of purchases.
Last	Click this button to view the last page of purchases.

Filtering Document Sales

You can filter the sales listed on the *Document Sales* page to display purchases made on or between certain dates, within certain locations, or for specific cases or users (using their email addresses).

To filter document sales:

1. Access the *Document Sales* page by clicking on the re:Search menu (☰).
2. Complete one or more of the following fields, as applicable:
   - Date From
   - Date To
   - Case Number
   - Location
   - Customer Email

   Note: For the Case Number, Location, and Customer Email fields, you can enter full or partial values. You can also enter two or more values separated with a space.
3. Click **Filter**.

Document Sales Filter Options

The *Document Sales* page provides the following filter options, which you can apply in any combination.

Option	Description
Date From	Click this field to select a start date.
Date To	Click this field to select an end date. If you do not select an end date, the end date is the current date.
Case Number	Type a complete or partial case number. Separate multiple case numbers with a space.
Location	Type a complete or partial location name. Separate multiple locations with a space.
Customer Email	Type a complete or partial email address. Separate multiple email addresses with a space.
Filter	Click this button to apply the filter criteria.
Clear	Click this button to clear the filter criteria.

Exporting Document Sales

You can export the sales listed on the *Document Sales* page to a comma-separated values (CSV) file and then open the file in a spreadsheet application, such as Microsoft® Excel®, Google Sheets™, or Apple® Numbers®.

Prerequisite: Your browser must be set up to allow pop-up windows.

To export document sales history:

1. Access the *Document Sales* page by clicking **Document Sales** on the re:Search menu ( ).
2. If necessary, apply filters to narrow the list of purchases.
3. Click **Export**.

   re:Search exports the document sales history to a CSV file. Your browser then prompts you to view or save the file.
4. Respond to your browser's prompt to view or save the file.

Court Document Purchase Reports

The court document purchase report is a report that can be used by court clerks to reconcile their document sales with the revenue payments received from Tyler Technologies.

The court document purchase report is run periodically (the state sets the frequency) for each court location and then emailed to the court clerks who wish to receive the reports. To be added to the distribution list for their court, clerks should contact Tyler Technologies technical support.

The report itself is a comma-separated values (CSV) file that can be opened in a spreadsheet application, such as Microsoft® Excel®, Google Sheets™, or Apple® Numbers®. Each report includes all purchases from the previous day, regardless of when Tyler receives the funds for the credit card purchases.

A	B	C	D	E	F
OrderItemID	Location	CaseNumber	CaseDescription	FilingDescription	DocumentDescription
13889	OFS QA 2017	CC-18-10429	Danny Defendant, SR v.Patty Plaintiff, JR	Test Filing	test.pdf
13909	OFS QA 2017	CC-18-10624	Danny Defendant, SR v.Patty Plaintiff, JR	Test Filing	test.pdf
13910	OFS QA 2017	CC-18-10500	Danny Defendant, SR v.Patty Plaintiff, JR	Test Filing	test.pdf
13948	OFS QA 2017	CC-18-10675	Danny Defendant, SR v.Patty Plaintiff, JR	Test Filing	test.pdf
13949	OFS QA 2017	CC-18-10384	Danny Defendant, SR v.Patty Plaintiff, JR	Test Filing	test.pdf

G	H	I	J	K	L
DocumentID	PurchaseDate	PurchaserName	PurchaserEmail	PageCount	Amount
8c946479-2a62-4f20-a3d9-e5ef7a588cba	10/9/2018 17:26	pushpin@tylertech.com	pushpin@tylertech.com	4	0.4
ab5a6537-871c-402e-8244-9d3f26e06216	10/10/2018 18:09	pushpin@tylertech.com	pushpin@tylertech.com	4	0.4
d9920df7-73f0-4a1f-b33e-7a00a755f289	10/10/2018 18:09	pushpin@tylertech.com	pushpin@tylertech.com	4	0.4
46da822a-66c5-4e24-8bac-a8bf09b38c44	10/12/2018 13:56	pushpin@tylertech.com	pushpin@tylertech.com	4	0.4
7819eb84-79bc-4dc7-973d-42af9d226089	10/12/2018 13:56	pushpin@tylertech.com	pushpin@tylertech.com	4	0.4

Figure 15.2 – Example Court Document Purchase Report

16 Clerk Admin Features

Topics covered in this chapter

Some features in re:Search are available only to clerk admins within their jurisdictions. This chapter describes those features and how to use them.

Note: Court admins in eFile or File & Serve are the equivalent of clerk admins in re:Search. If you need clerk admin rights in re:Search, contact your eFile administrator to update your eFile account with the court admin role.

Displaying the Change Log for a Case

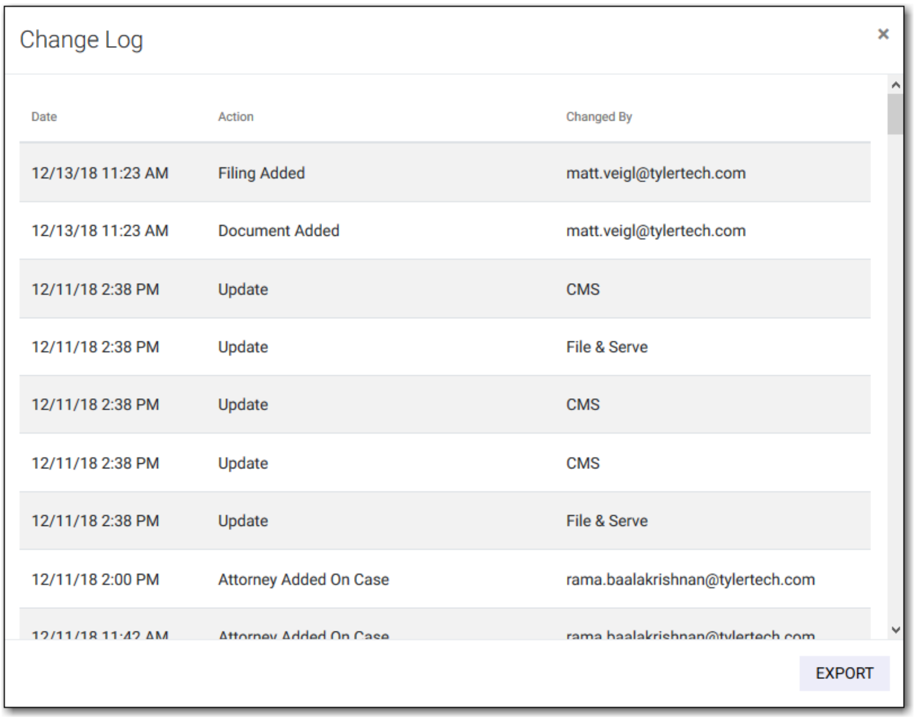
As a clerk admin, you can display a list of changes made to a case.

To display the change log for a case:

1. Access the *Case Details* page for the case, or access the *Filing Details* page for any filing attached to the case.

2. In the **Case Information** section, click , and then click **Change Log**.

   The *Change Log* dialog box is displayed.



Change Log

Date	Action	Changed By
12/13/18 11:23 AM	Filing Added	matt.veigl@tylertech.com
12/13/18 11:23 AM	Document Added	matt.veigl@tylertech.com
12/11/18 2:38 PM	Update	CMS
12/11/18 2:38 PM	Update	File & Serve
12/11/18 2:38 PM	Update	CMS
12/11/18 2:38 PM	Update	CMS
12/11/18 2:38 PM	Update	File & Serve
12/11/18 2:00 PM	Attorney Added On Case	rama.baalakrishnan@tylertech.com
12/11/18 11:42 AM	Attorney Added On Case	rama.baalakrishnan@tylertech.com

EXPORT

Figure 16.1 – Change Log for a Case

   The following information is displayed for each change on the *Change Log* dialog box:

   - Date the change was made
   - Action or type of change
   - User or system that made the change

3. To export the change log to an Excel spreadsheet, click **Export**.

Displaying the Viewer Log for a Case

Clerk admins can display a list of users who have viewed a case.

To display the viewer log for a case:

1. Access the *Case Details* page for the case, or access the *Filing Details* page for any filing attached to the case.

2. In the **Case Information** section, click , and then click **Viewer Log**.

   The *Viewer Log* dialog box is displayed.

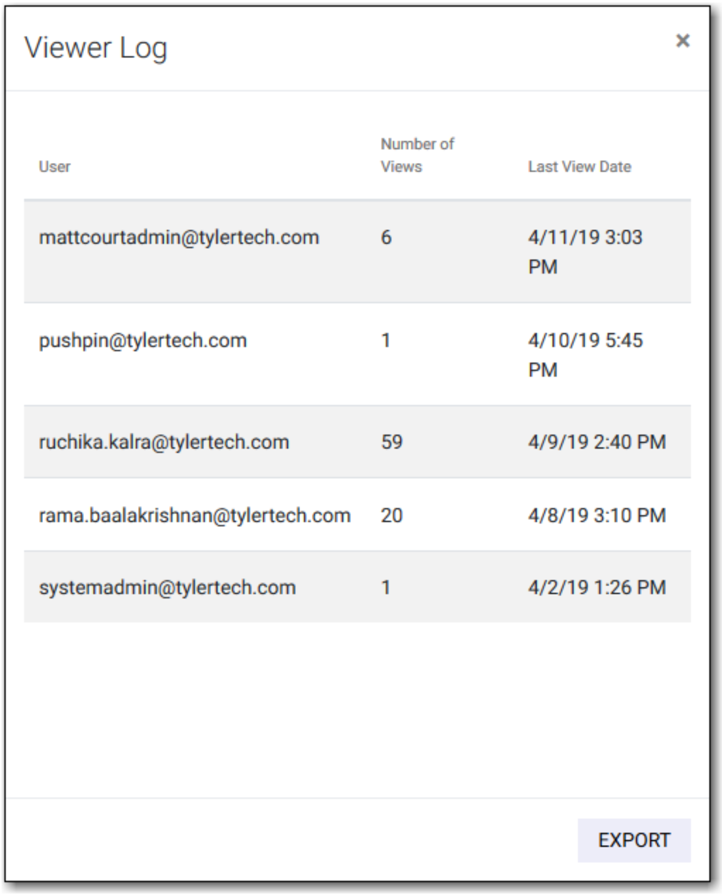


Figure 16.2 – Viewer Log for a Case

   The following information is displayed for each user on the *Viewer Log* dialog box:

   - User's email address/user name
   - Number of times the user viewed the case
   - Date and time the user last viewed the case

3. To export the log to an Excel spreadsheet, click **Export**.

Controlling Access to Cases, Filings, and Documents

Each state has rules that govern which cases, filings, and documents should be available for viewing and which should be more restricted. In cases that involve children, for example, the court may need to restrict access to cases or individual documents. When necessary, clerk admins can restrict access to individual cases, filings, and documents by marking them with the appropriate security level.

The security levels are as follows:

- Non-Confidential—A non-confidential case, filing, or document is available to all users. This is the default security level for most cases, filings, and documents.
- Confidential—Depending on the state, a confidential case, filing, or document is typically available only to judges and clerks within their respective jurisdictions, an attorney on the case, a self-represented litigant (SRL) on the case, and a party on the case. Court users outside of their respective jurisdictions, non-lead attorneys, and other non-privileged users cannot access a confidential case, filing, or document.
- Sealed—Depending on the state, a sealed case or document is typically visible only to judges and clerks within their respective jurisdictions.

Note: These are the security levels that are currently supported in re:Search. Your state, however, may not support or recognize all of these security levels, or your state may define them differently than how they are described here. Tyler Technologies configures re:Search to manage the security levels according to how each state defines them.

Note: In integrated court locations, access to cases, filings, and documents should be controlled from the court's case management system (CMS), not re:Search.

To control access to cases, filings, and individual documents:

1. Access the *Case Details* page or the *Filing Details* page for the case or filing.
2. Control access to the case, filing, or document as follows:

Option	Description
To control access to the case:	Click ⋮ in the **Case Information** section, and then do one of the following: • Select **Mark as Confidential** to mark the case as confidential. • Select **Mark as Non-confidential** to allow access to the case. • Select **Mark as Sealed** to seal the case.
To control access to the filing:	Click ⋮ in the corner of the **Filing** section, and then do one of the following: • Select **Mark as Confidential** to mark the filing as confidential. • Select **Mark as Non-confidential** to allow access to the filing. **Note: At this time, filings cannot be marked as sealed.**
To control access to a document:	Click ⋮ on the document row, and then do one of the following: • Select **Mark as Confidential** to mark the document as confidential. • Select **Mark as Non-confidential** to allow access to the document. • Select **Mark as Sealed** to seal the document.

Note: If the case is restricted, the filing is automatically restricted. If the filing is restricted, all attached documents are automatically restricted.

The following figure shows the locations of the More Options menus (⋮) on the *Case Details* page. These menus contain the options for controlling access to cases, filings, and documents. The layout is similar on the *Filing Details* page.

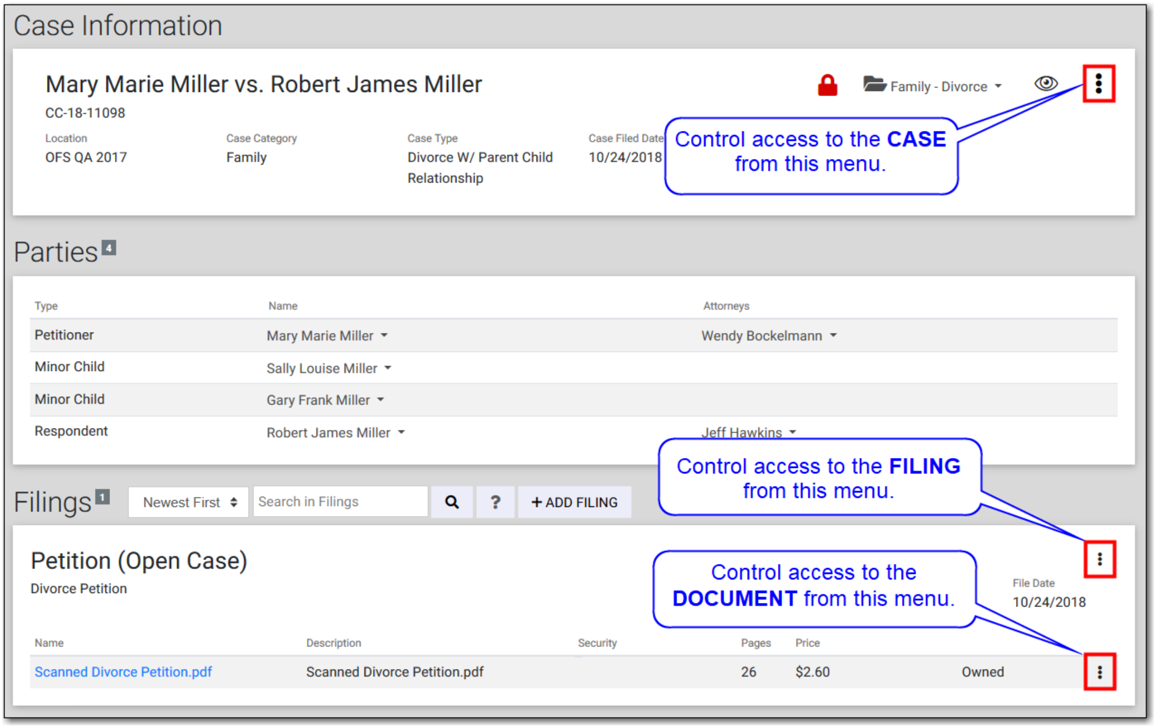


Figure 16.3 – Menus Used to Control Access to Cases and Documents

Changing the Security Level for a Party

When necessary, clerk admins for re:Search can change the security level for a party.

The security levels for parties are as follows:

- Non-Confidential—A non-confidential party is visible to all users. This is the default security level for most parties.
- Confidential—Depending on the state, a confidential party is typically visible only to judges and clerks within their respective jurisdictions, an attorney on the case, a self-represented litigant (SRL) on the case, and a party on the case. Court users outside of their respective jurisdictions, non-lead attorneys, and other non-privileged users cannot see a confidential party.
- Sealed—Depending on the state, a sealed party is typically visible only to judges and clerks within their respective jurisdictions.

Note: These are the security levels that are currently supported in re:Search. Your state, however, may not support or recognize all of these security levels, or your state may define them differently than how they are described here. Tyler Technologies configures re:Search to manage the security levels according to how each state defines them.

To change the security level for a party:

1. Access the *Case Details* page for the case.
2. In the **Parties** section, click the name of the party to open the Name Options menu, and then do one of the following:
    - Select **Mark as Confidential** to mark the party as confidential.
    - Select **Mark as Non-confidential** to mark the party as non-confidential.
    - Select **Mark as Sealed** to mark the party as sealed.

   re:Search indicates the new security level as follows:

    - A Locked icon ( ) is displayed next to the party if the party is marked as confidential.
    - A Gavel icon ( ) is displayed next to the party if the party is marked as sealed.
    - The absence of an icon indicates that the party is marked as non-confidential.

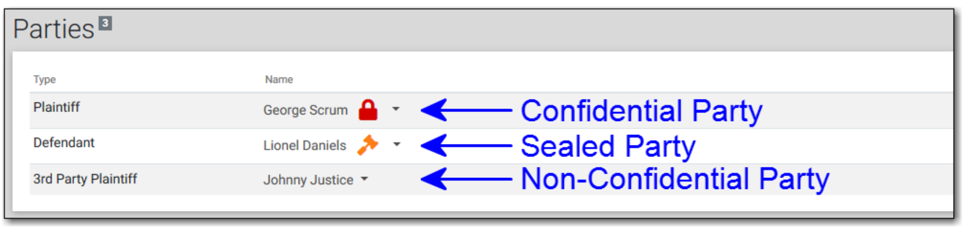


Figure 16.4 – Confidential, Sealed, and Non-Confidential Parties

Note: Case descriptions typically include party names. If a party who is referenced in a case description is marked as sealed or confidential, that party's name should not appear in the case description. Likewise, if the party is marked as non-confidential, that party's name should appear in the case description, depending on your local requirements. When you change the security level for a party, remember to edit the case description to add or remove the party's name. Refer to "Editing Case Information" for instructions on how to edit the case description.

Giving Parties Access to Cases

Clerk admins can give a party on a case privileged access to his or her case in re:Search.

To give a party access to his or her case:

1. Access the *Case Details* page for the case.
2. Click the party's name to open the Name Options menu, and then click **Give Party Access**.

   The *Give Party Access To This Case* dialog box opens.
3. Confirm or type the party's email address in the **Case Party Email** field.

   Note: If re:Search has an email address for the party, it is automatically entered in the Case Party Email field.
4. Click **Give Party Access**.

Editing Case Information

Clerk admins can edit case information, such as the case status or location.

Note: In integrated court locations, clerk admins should perform this task through the court's case management system (CMS), not through re:Search.

To edit the case information:

1. Access the *Case Details* page for the case, or access the *Filing Details* page for a filing on the case.
2. Click the More Options menu (⋮) in the **Case Information** section, and then click **Edit**.

   The *Edit Case Information* dialog box opens.

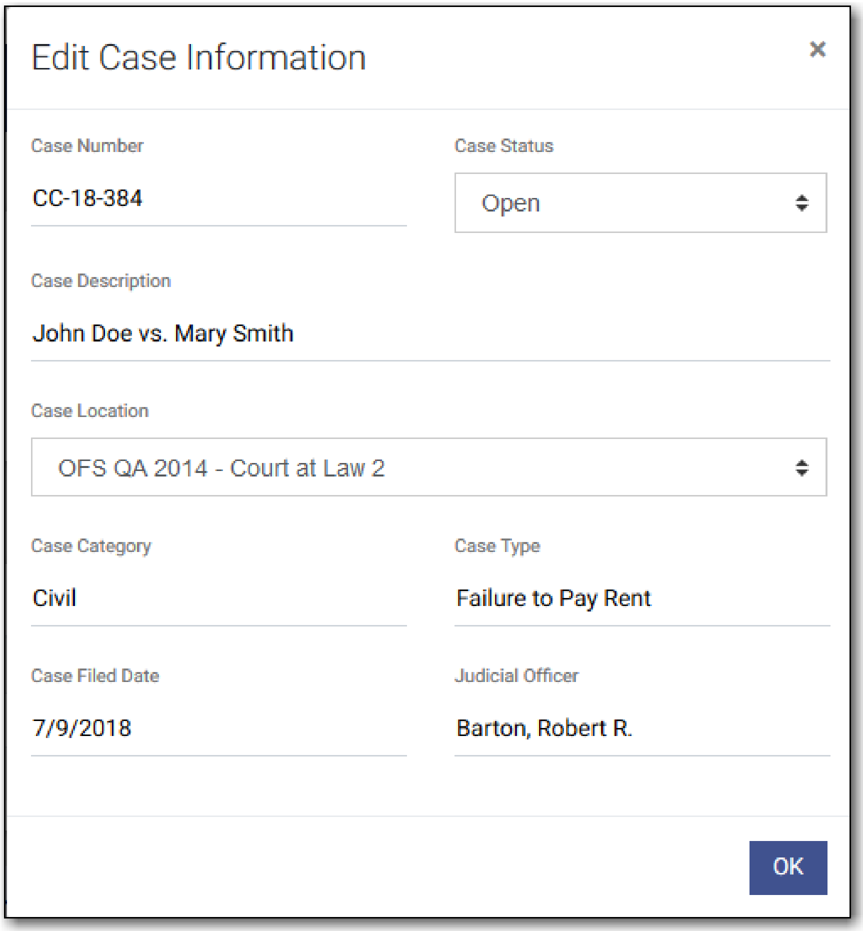


Figure 16.5 – Edit Case Information Dialog Box

3. Update the fields as required.
4. Click **OK** to save your changes.

Edit Case Information Dialog Box Fields

You can use the *Edit Case Information* dialog box to add or change case information.

Note: The *Edit Case Information* dialog box is available only to clerk admins in non-integrated court locations.

The *Edit Case Information* dialog box includes the following fields.

Field	Description
Case Number	Enter or replace the case number that was assigned to the case by the court.
Case Status	Select one of the following options from the drop-down list: • Select **Open** if the case is open. • Select **Closed** if the case is closed. **Note: When you select Closed, attorneys on the case lose privileged access to the case after a predetermined number of days.**
Case Description	Enter or update the case description.
Case Location	Select a new court location from the drop-down list.
Case Category	Enter or change the case category. The case categories are as follows: • Appellate • Civil • Family • Probate or Mental Health
Case Type	Enter or change the case type.
Case Filed	Enter or update the case filing date.
Judicial Officer	Enter or change the name of the judicial officer to whom the case is assigned.

Adding a Filing to a Case

In non-integrated court locations, clerk admins can add a filing to a case.

Note: In integrated court locations, clerk admins should perform this task through the court's case management system (CMS), not through re:Search.

To add a filing to a case:

1. Access the *Case Details* page for the case.
2. In the **Filings** section, click **Add Filing**.

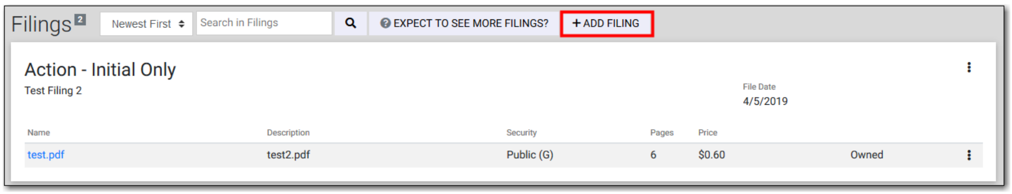


Figure 16.6 – Add Filing Button on Case Details Page

The *Add Filing* dialog box opens.

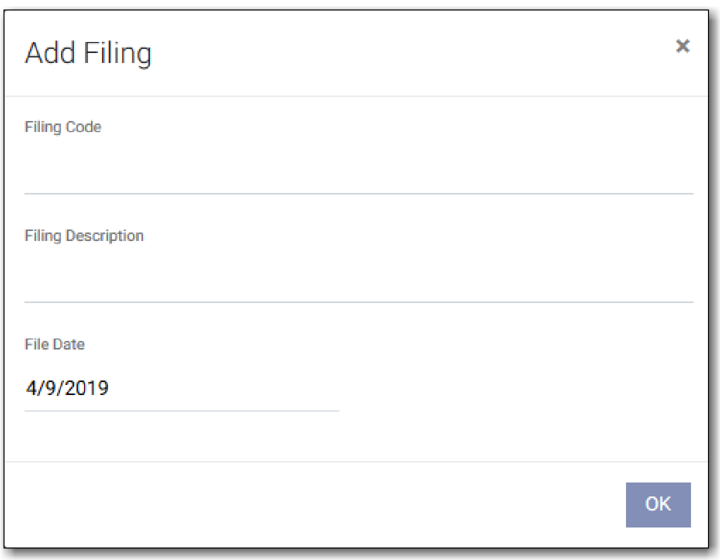


Figure 16.7 – Add Filing Dialog Box

3. Complete the fields.
4. Click **Ok**.

The filing is added to the case.

Add/Edit Filing Dialog Box Fields

You can use the *Add/Edit Filing* dialog box to add or edit a filing.

The *Add/Edit Filing* dialog box includes the following fields.

Field	Description
Filing Code	Enter or change the filing code name.
Filing Description	Enter or change the filing description.
File Date	Enter or change the filing date. Clicking the date opens a calendar from which you can select a different date.

Editing a Filing on a Case

In non-integrated court locations, clerk admins can edit filing details, such as the filing code or the file date.

Note: In integrated court locations, clerk admins should perform this task through the court's case management system (CMS), not through re:Search.

To edit a filing:

1. Access the *Case Details* page for the case, or access the *Filing Details* page for the filing on the case.
2. Click the More Options menu (⋮) on the filing that you want to edit, and then click **Edit Filing**.

Figure 16.8 – Edit Option on More Options Menu

The *Edit Filing* dialog box opens.

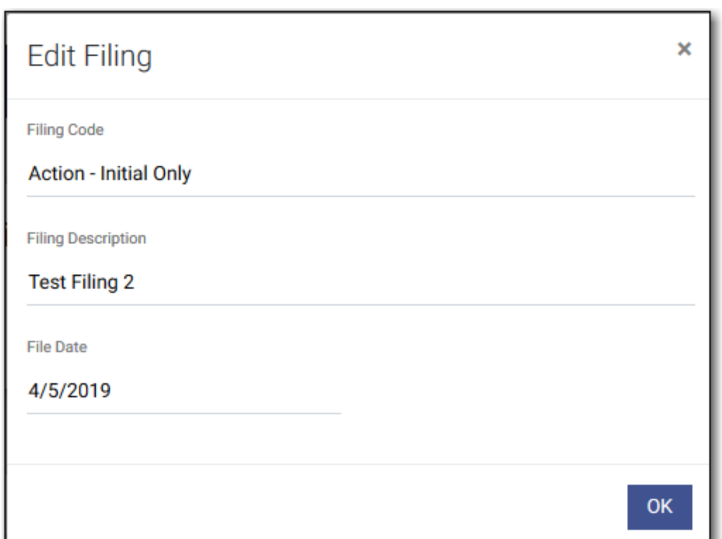


Figure 16.9 – Edit Filing Dialog Box

3. Complete the fields.
4. Click **Ok**.

The filing is updated.

Add/Edit Filing Dialog Box Fields

You can use the *Add/Edit Filing* dialog box to add or edit a filing.

The *Add/Edit Filing* dialog box includes the following fields.

Field	Description
Filing Code	Enter or change the filing code name.
Filing Description	Enter or change the filing description.
File Date	Enter or change the filing date. Clicking the date opens a calendar from which you can select a different date.

Deleting a Filing from a Case

In non-integrated court locations, clerk admins can delete a filing from a case.

Note: In integrated court locations, clerk admins should perform this task through the court's case management system (CMS), not through re:Search.

To delete a filing:

1. Access the *Case Details* page for the case, or access the *Filing Details* page for the filing on the case.
2. Click the More Options menu (⋮) on the filing that you want to delete, and then click **Delete Filing**.

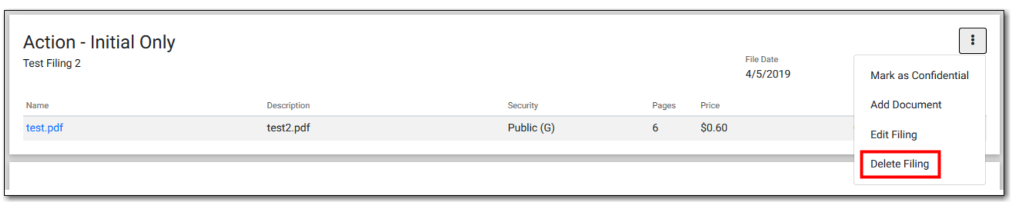


Figure 16.10 – Delete Filing Option on More Options Menu

A confirmation message opens, asking you to confirm that you want to delete the filing.

3. Click **Delete**.

The filing is removed from the case.

Adding a Document to a Filing

A clerk admin can add a document to a filing. If the document needs to be redacted, the clerk admin can do so while adding the document.

Note: Document redaction must be configured for your site and may not be available for all sites.

Note: In integrated court locations, clerk admins should perform this task through the court's case management system (CMS), not through re:Search.

To add a document to a filing:

1. Access the *Case Details* page for the case, or access the *Filing Details* page for a filing on the case.
2. Click the More Options menu (⋮) on the filing, and then click **Add Document**.

Figure 16.11 – Add Document Option on More Options Menu

The *Add Document* dialog box opens.

3. Click **Choose File**, select the file on your desktop, and then click **Open**.

   Note: re:Search supports PDF and TIFF file formats.

   The *Add Document* dialog box now displays the name of the file that you selected, as well as some additional fields. The **Name** and **Description** fields automatically display the name of the file that you selected, but you can change one or both of these fields, if necessary.

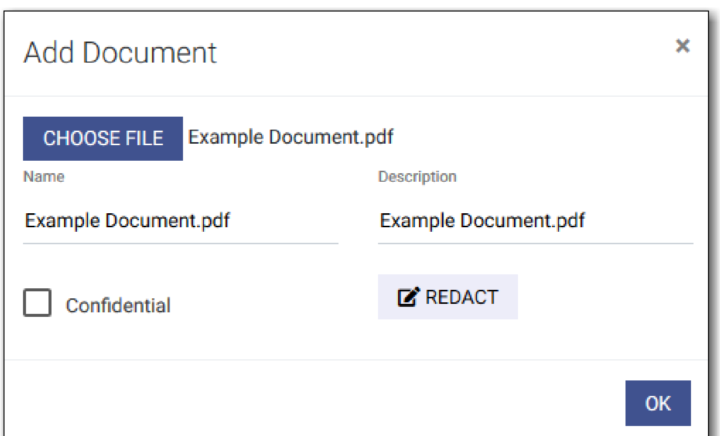


Figure 16.12 – Add Document Dialog Box After Selection of a Document

4. Update the **Name** and **Description** fields, if necessary.
5. Select the **Confidential** check box to mark the document as confidential. If you do not select the **Confidential** check box, the document will be marked as non-confidential.

6. If you need to redact the document, perform the following steps:

   a. Click **Redact**.

      re:Search uploads the document and scans it for items to be redacted. re:Search lists each step in the process and marks each step with a green check mark as it completes the step. The last step is to note the number of items (if any) that were selected to be redacted.

      Note: The document is not actually redacted until you click OK. Also, the specific items that re:Search searches for to redact, such as dates of birth and Social Security numbers, must be configured for your site.

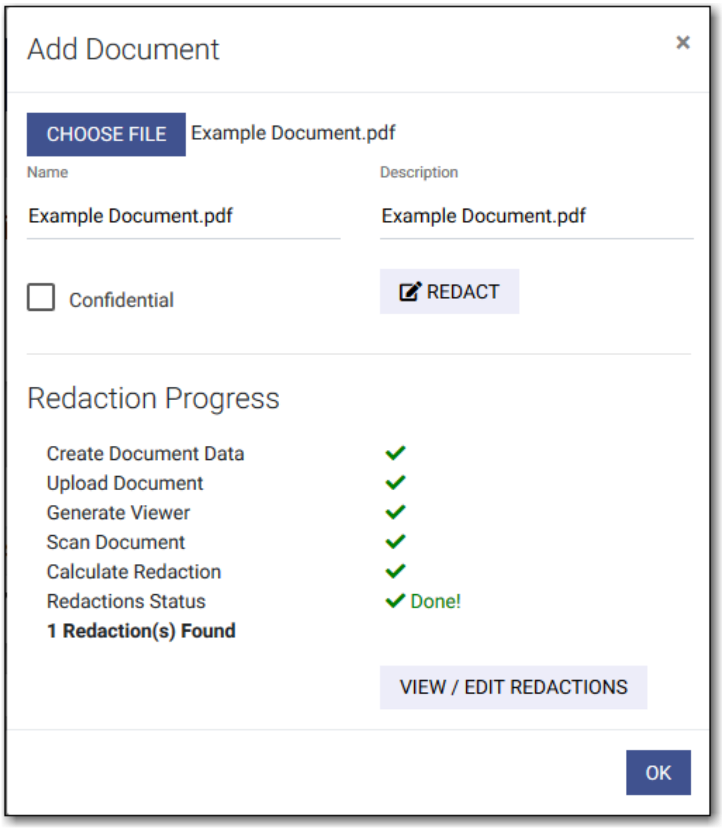


Figure 16.13 – Redaction Process on Add Document Dialog Box

   b. If you want to review the items that re:Search selected to redact, click **View/Edit Redactions**.

      The document opens in the Tyler Content Manager document viewer. The items that re:Search selected are highlighted such that you can still read them. Once you finish adding or replacing the document, the highlights become black bars.

c. To select additional items to redact in the document, click the Redact Area icon (), and then select each item or area that you want to redact by drawing a box around each item with your mouse pointer. When you finish, click the Redact Area icon () again.

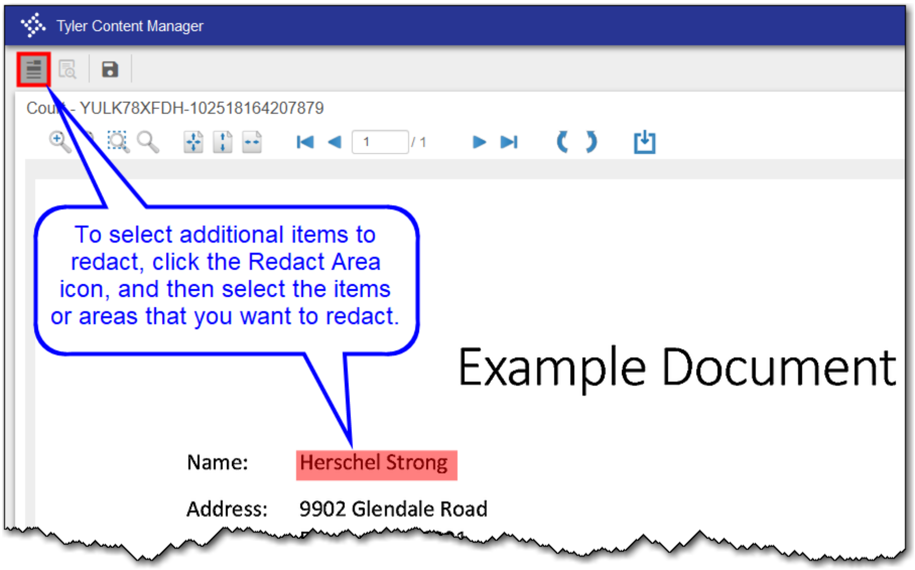


Figure 16.14 – Manually Selecting Information for Redaction

d. To unselect items that re:Search selected to redact (so that they will not be redacted), right-click the item to display a pop-up menu, and then click the Delete icon (). When prompted, click **Delete** on the confirmation message that opens.

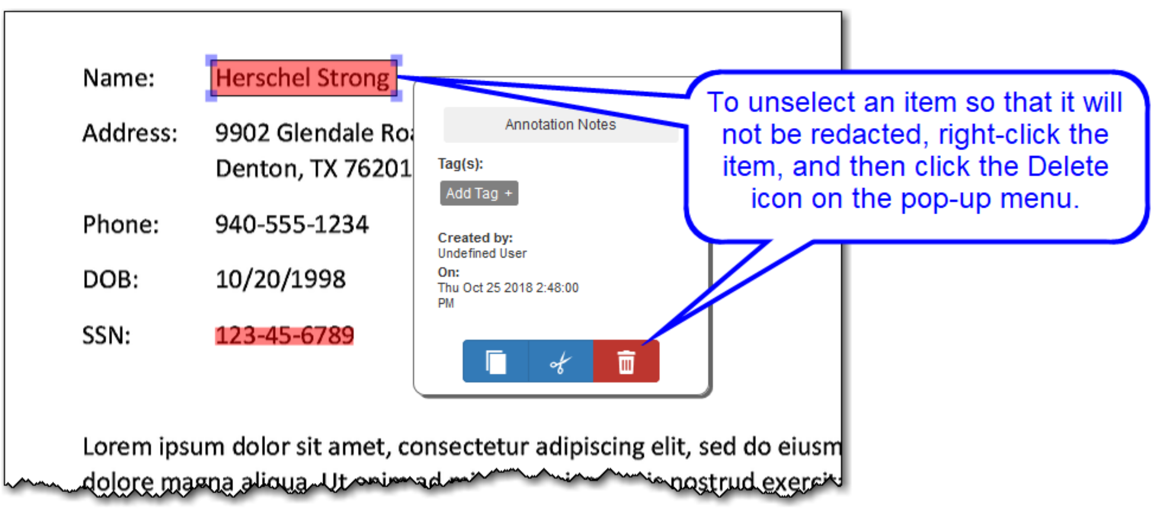


Figure 16.15 – Manually Unselecting Information for Redaction

e. When you finish, click the Save and Close Viewer icon () in the top-right corner of the viewer.

The document viewer saves the document and then closes. At this time, the items that were selected for redaction are redacted.

7. On the *Add Document* dialog box, click **Ok**.

The new document is added to the filing.

Replacing a Document on a Filing

A clerk admin can replace a document on a filing. If the document needs to be redacted, the clerk admin can do so while replacing the document.

Note: Document redaction must be configured for your site and may not be available for all sites.

Note: In integrated court locations, clerk admins should perform this task through the court's case management system (CMS), not through re:Search.

To replace a document:

1. Access either the *Case Details* page or the *Filing Details* page for the filing with the document to be replaced.
2. On the row for the document to be replaced, click the More Options menu (⋮), and then click **Replace Document**.

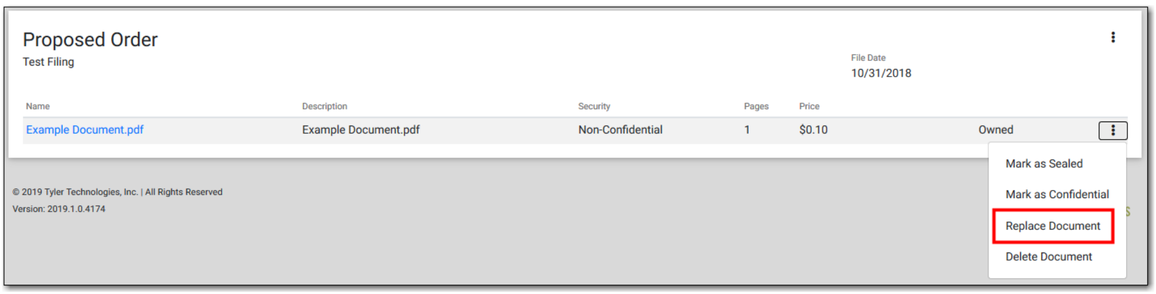


Figure 16.16 – Replace Document Option on More Options Menu

The *Replace Document* dialog box opens.

3. Click **Choose File**, select the file on your desktop, and then click **Open**.

   Note: re:Search supports PDF and TIFF file formats.

   The *Replace Document* dialog box now displays the name of the file that you selected.

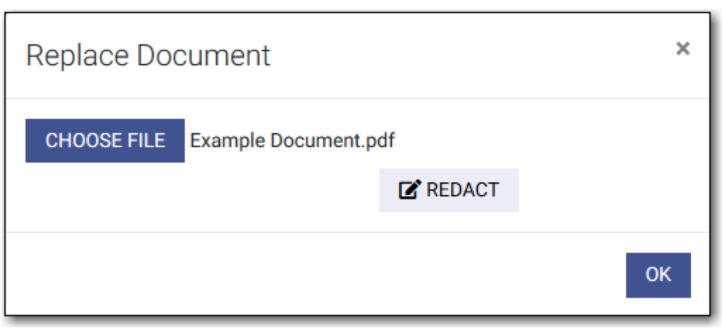


Figure 16.17 – Replace Document Dialog Box After Selection of a Document

4. If you need to redact the document, perform the following steps:

   a. Click **Redact**.

      re:Search uploads the document and scans it for items to be redacted. re:Search lists each step in the process and marks each step with a green check mark as it completes the step. The last step is to note the number of items (if any) that were selected to be redacted.

      Note: The document is not actually redacted until you click OK. Also, the specific items that re:Search searches for to redact, such as dates of birth and Social Security numbers, must be configured for your site.

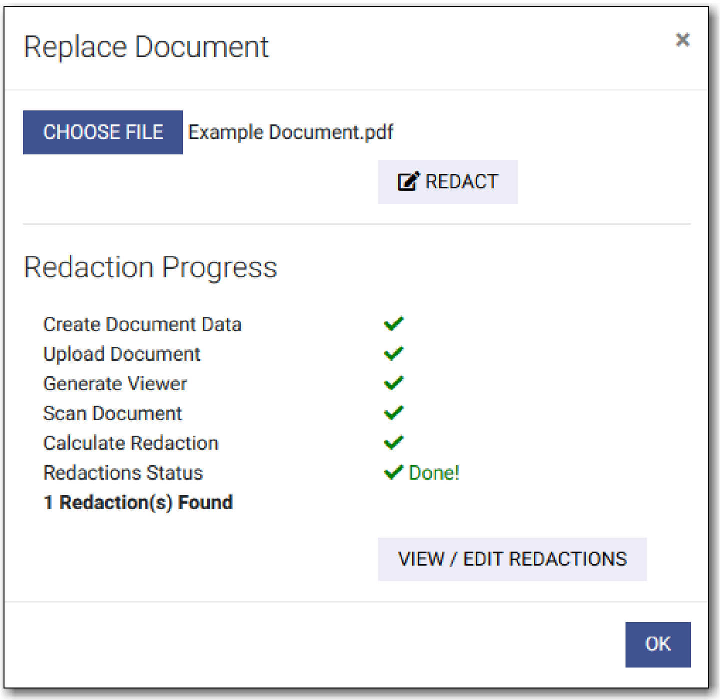


Figure 16.18 – Redaction Process on Replace Document Dialog Box

   b. If you want to review the items that re:Search selected to redact, click **View/Edit Redactions**.

      The document opens in the Tyler Content Manager document viewer. The items that re:Search selected are highlighted such that you can still read them. Once you finish adding or replacing the document, the highlights become black bars.

c. To select additional items to redact in the document, click the Redact Area icon (), and then select each item or area that you want to redact by drawing a box around each item with your mouse pointer. When you finish, click the Redact Area icon () again.

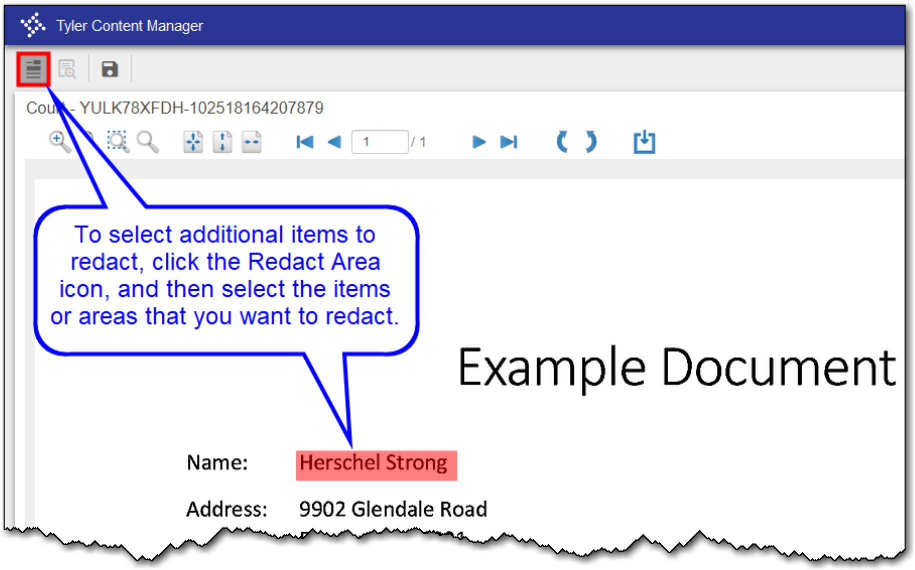


Figure 16.19 – Manually Selecting Information for Redaction

d. To unselect items that re:Search selected to redact (so that they will not be redacted), right-click the item to display a pop-up menu, and then click the Delete icon (). When prompted, click **Delete** on the confirmation message that opens.

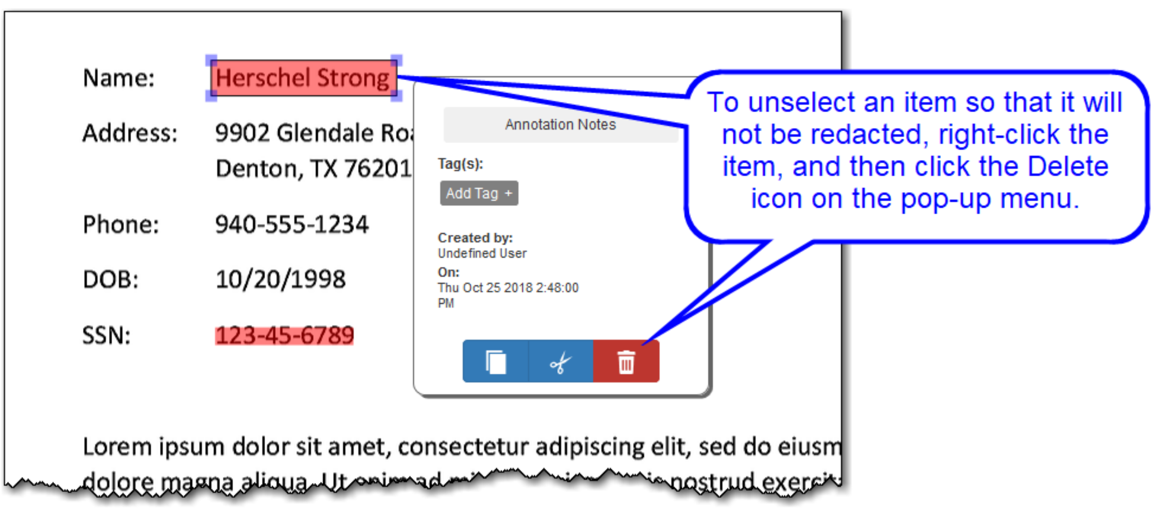


Figure 16.20 – Manually Unselecting Information for Redaction

e. When you finish, click the Save and Close Viewer icon () in the top-right corner of the viewer.

The document viewer saves the document and then closes. At this time, the items that were selected for redaction are redacted.

5. On the *Replace Document* dialog box, click **Ok**.

The old document is replaced by the new document.

Deleting a Document from a Filing

In non-integrated court locations, clerk admins can delete a document from a filing.

Note: In integrated court locations, clerk admins should perform this task through the court's case management system (CMS), not through re:Search.

To delete a filing:

1. Access the *Case Details* page for the case, or access the *Filing Details* page for the filing on the case.
2. Click the More Options menu (⋮) on the document row for the document that you want to delete, and then click **Delete Document**.

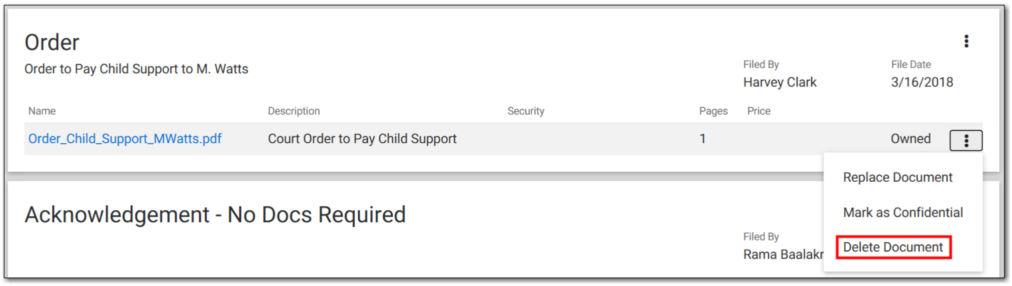


Figure 16.21 – Delete Document Option on More Options Menu

A confirmation message opens, asking you to confirm that you want to delete the document.

3. Click **Delete**.

The document is removed from the filing.

Adding an Attorney

Clerk admins can add one or more attorneys to a party on a case. Attorneys are displayed in the **Attorneys** field.

To add an attorney:

1. Access the *Case Details* page for the case.
2. In the **Parties** section, click the name of the party for whom you need to add an attorney to open the Name Options menu, and then click **Add Attorney**.

   The *Add Attorney* dialog box is displayed.
3. Type the attorney's name or attorney/bar number in the field provided, and then click **Search**.
4. Select the attorney from the listed search results.
5. Click **Save**.

The new attorney's name is displayed in the **Attorneys** field.

Removing an Attorney

Clerk admins can remove attorneys from a case.

To remove an attorney:

1. Access the *Case Details* page for the case.
2. In the **Parties** section, click the name of the attorney who needs to be removed to open the Name Options menu, and then click **Remove Attorney**.

   re:Search displays a confirmation message to verify that you really want to remove the attorney.
3. Click **Remove**.

The attorney's name is removed from the **Attorneys** field.

Maintaining Clerk's Office Contact Information

The clerk's office contact information is provided in the **Case Information** section on the *Case Details* page and the *Filing Details* page.

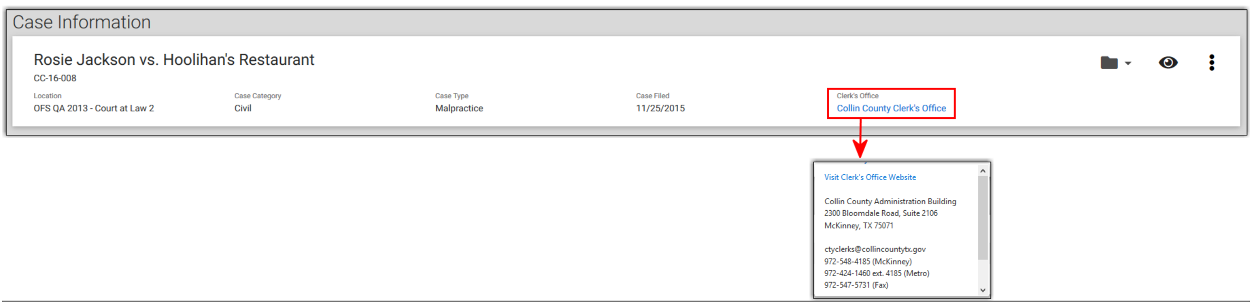


Figure 16.22 – Clerk's Office Contact Information on Case Details Page

Adding a New Clerk's Office

Clerk admins do not currently have the ability to add a new clerk's office in re:Search.

To add a new office location, contact Tyler Technologies customer support.

Resource	Contact Information
Support Hours	7:00 AM to 9:00 PM (CT), Monday through Friday
Telephone	877.687.7870
Email	Research.Support@tylertech.com

Updating Clerk's Office Contact Information

Clerk admins can update the contact information for their office locations.

Caution: Be aware that you CANNOT UNDO CHANGES after you click Save, so proceed with caution, especially if you are making changes to ALL locations.

To update the clerk's office contact information:

1. Click , and then click **Clerk Admin**.

   The clerk admin's *Settings* page is displayed.
2. Click **Clerk's Office Contact Information**.

   The *Clerk's Office Contact Information* page is displayed.

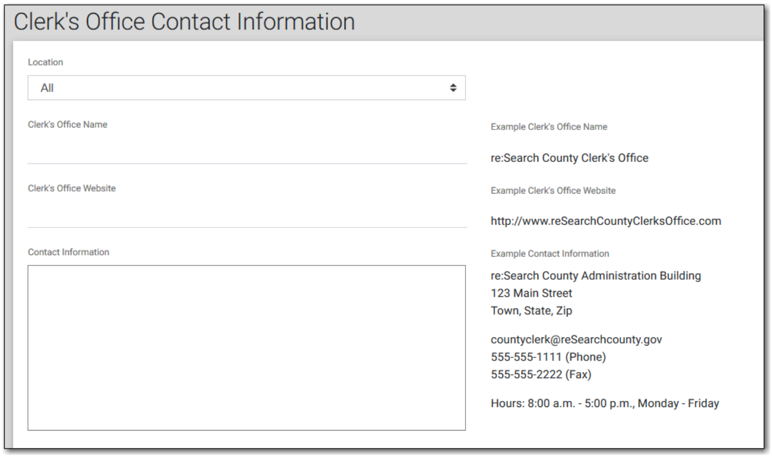


Figure 16.23 – Contact Information Fields on the Clerk's Office Contact Information Page

3. Do one of the following:
   - To update the contact information for all offices, select **All** from the **Location** drop-down list.
   - To update the contact information for one office, select the office from the **Location** drop-down list.
4. Enter the clerk's office name in the **Clerk's Office Name** field.

   This is the name that is displayed in the **Case Information** section on the *Case Details* page and the *Filing Details* page.
5. Enter the office's official website in the **Clerk's Office Website** field.
6. Enter the office's contact information in the **Contact Information** field.

   Contact information can include the street address, email address, phone numbers, and business hours.
7. Click **Save** to save the changes, or click **Clear** to cancel what you began and start over.

Configuring the Case Summary Link

Use this procedure to add or update the case summary link () that appears in the **Case Information** section on both the *Case Details* page and the *Filing Details* page for a case.

To add or update the case summary link:

1. Click the re:Search menu (), and then click **Clerk Admin**.

   The clerk admin's *Settings* page is displayed.
2. Click **External Case Summary Link Setup**.

The *External Case Summary Link Setup* page is displayed.

3. Select the office or court location from the **Location** drop-down list at the top of the page.

   If you selected a location for which a case summary link has already been configured, the **Show Icon for External Case Summary Link** check box is selected automatically, and the current values are displayed in the **Link Description** and **Link URL** fields. Otherwise, the check box is not selected, and the fields are blank.

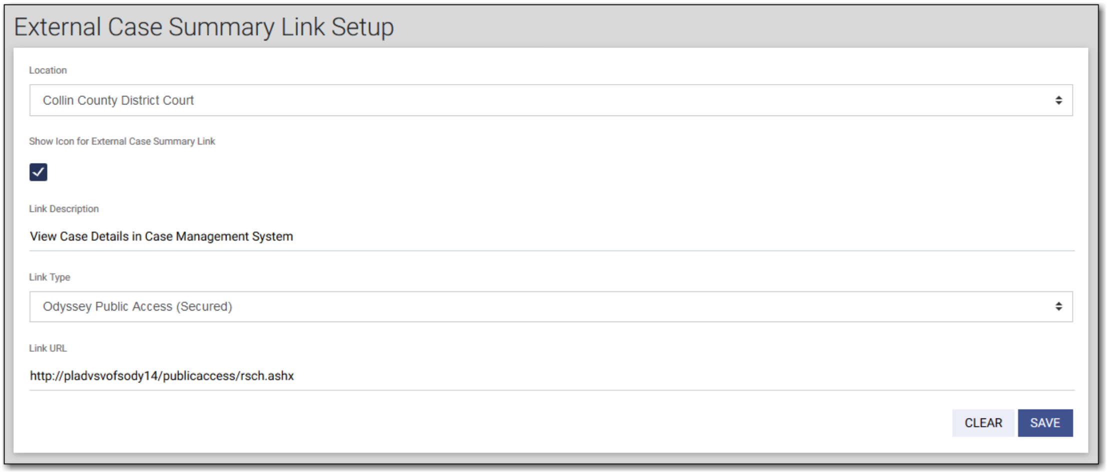


Figure 16.24 – External Case Summary Link Setup Page

4. If it is not already selected, select the **Show Icon for External Case Summary Link** check box.
5. Type a link description in the **Link Description** field, or edit the current link description.

   The link description is used for the tooltip for the case summary link ().

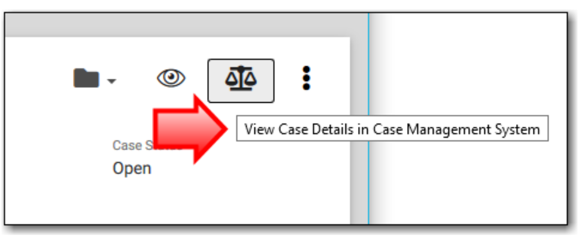


Figure 16.25 – Case Summary Link Tooltip

6. Select the appropriate link type from the **Link Type** drop-down list:
   - **Odyssey Public Access (Secured)**—Select this link type if your court uses Tyler's Secured Odyssey Public Access website for public access to court records.
   - **Other Website**—Select this link type if your court uses another website for public access to court records.
7. Type or paste the address for your court's public access website into the **Link URL** field, or edit the current URL if necessary.

   If you selected **Other Website** in the previous step, you can include the case management system (CMS) ID of the case in the address by adding the token `{0}` as shown in the following examples:
   - `https://my.court.gov/cases/{0}`
   - `https://my.court.gov/cases?caseid={0}`

8. Click **Save**.

Expunging Cases

You cannot expunge cases directly in re:Search. Cases must be expunged through the court’s case management system (CMS) or the statewide e-filing system.

In integrated court locations, when a case is expunged in the court's CMS, the CMS generates an "expunge case" message and sends it to re:Search. Upon receipt of this message, re:Search automatically expunges the case from its database. Although this process happens automatically, to minimize the impact to the system and its users, case expunctions normally take place overnight during maintenance hours.

In non-integrated court locations, when a case is expunged in the court's CMS, no notification is sent to re:Search. To expunge a case from the re:Search database, the case must be expunged through the statewide e-filing system.

Enabling Kiosk Mode

As a clerk admin, you can enable kiosk mode on a computer to designate that computer as a public kiosk.

Prerequisite: To enable kiosk mode, you will need the email address associated with the kiosk user profile. To define a kiosk user role for your site, contact Tyler Technologies customer support.

To enable kiosk mode:

1. Sign in to re:Search on the computer that will be the kiosk.

   Note: Sign in as a clerk admin, not as the kiosk user.

2. Click the re:Search menu (), and then click **Clerk Admin**.

   The clerk admin’s *Settings* page is displayed.

3. Click **Kiosk Setup**.

   The *Kiosk Setup* page is displayed.

4. Select **Make this computer a kiosk**.

   Additional fields are displayed.

5. Type the kiosk user’s email address in the **Kiosk User Email** field.
6. Type a description for the kiosk in the **Kiosk Description** field.
7. Click **Enable Kiosk Mode**.

Kiosk mode is enabled on the computer, and the *Dashboard* is displayed.

Kiosk Setup Page Fields

Use the *Kiosk Setup* page to enable kiosk mode on a computer.

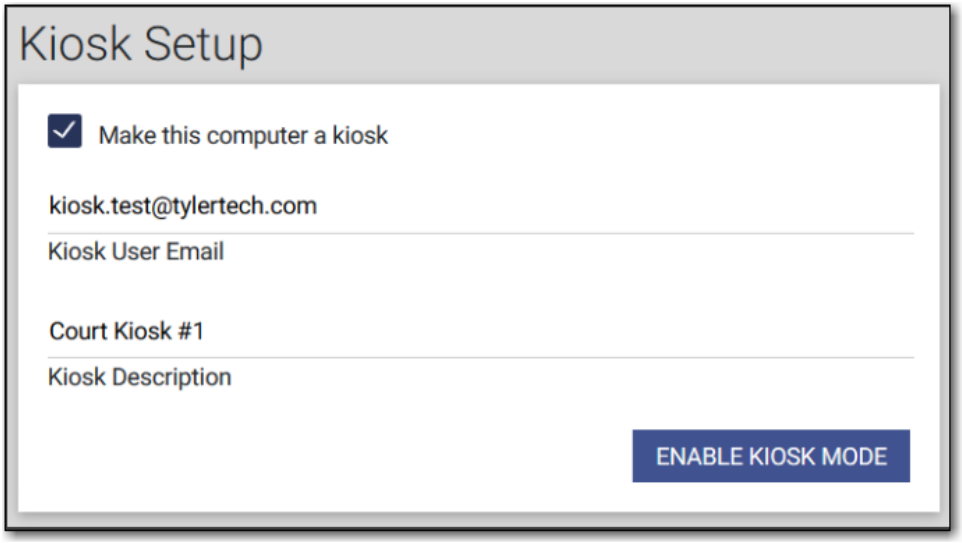


Figure 16.26 – Kiosk Setup Page

Field	Description
Make this computer a kiosk	Select this check box to enable kiosk mode. Selecting this check box displays the other two fields on this page.
Kiosk User Email	Type the email address associated with the kiosk user profile.
Kiosk Description	Type a description for the kiosk computer.

Disabling Kiosk Mode

You can disable kiosk mode on a computer being used as a public kiosk.

To disable kiosk mode, clear the browser's cookies.

Deleting the browser's cookies automatically signs out the kiosk user. re:Search then displays the re:Search home page, where you or another user can sign in.