Benchmark™

User Guide

E-File Web & Windows

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INTRODUCTION

This manual introduces and assists with submitting electronic file submissions via the Benchmark Web interface and processing electronic file submissions received from Benchmark Web in the Benchmark client.

Revision History

Name	Date	Reason For Changes	Version
Emily Ball	07/12/11	Document Created	2.3
Nancy Ford	08/5/11	Updated with Graphics	2.3
Bryan Rosenfarb	11/19/13	Updated for Wayne Ohio	2.3

This manual is designed to provide an overview of the basic processes and workflow items contained within Benchmark. Pioneer Technology Group reserves the right to update, change, delete or append to this manual at any time.

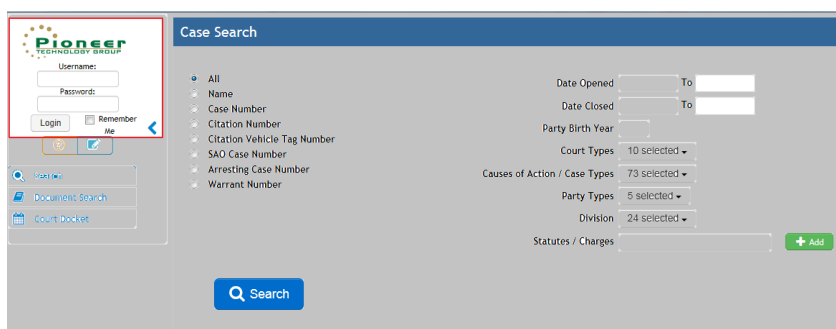*Please note that some screens and/or text may appear differently in the most current version.*
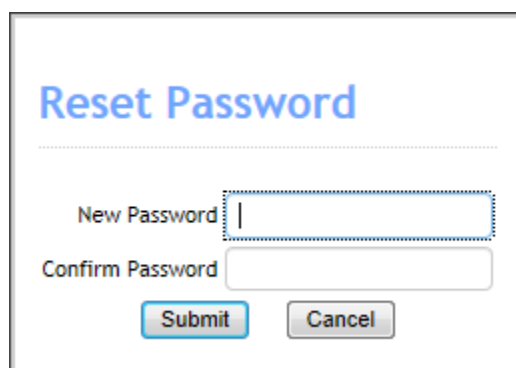
SUMMARY

This user guide details the e-File functionality. The guide begins with the creation a new case e-file submission and the process of filing to an existing case via a secure login through Benchmark Web. The guide then reviews viewing submissions that have come in from Benchmark Web, and the process of updating and accepting or rejecting those submissions.

# Creating a New e-File Submission via Benchmark Web

1. Navigate to the Benchmark Web homepage through the Court's Public Access link located at www.waynecourts.org. You will then login to the secure access site using an authorized username and password.

2. If this is your first time accessing the system with your temporary password you will immediately be prompted to enter a new, secure password. All passwords must be a minimum of 5 characters and include at least one letter and one number. You will be prompted to change your password every 90 days to ensure system security and integrity.
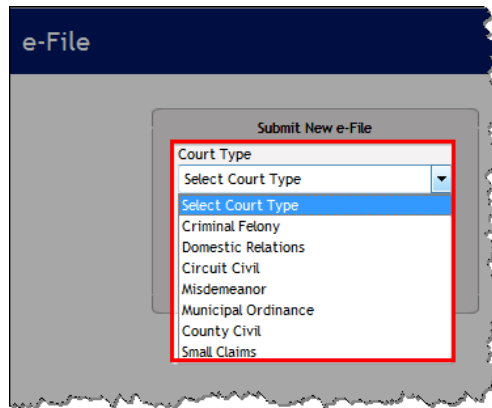

3. Navigate to the e-File option in the main menu on the left side of the screen and click the **Submit New** button to open the e-File page.
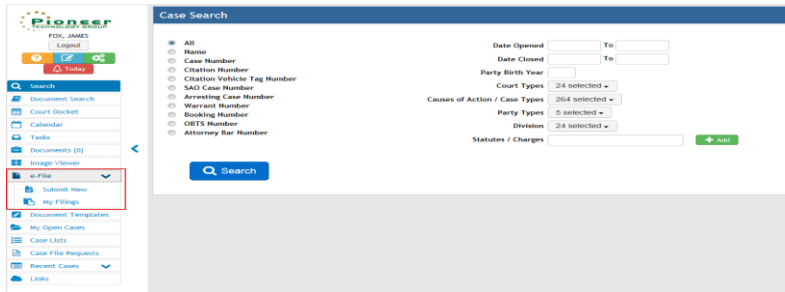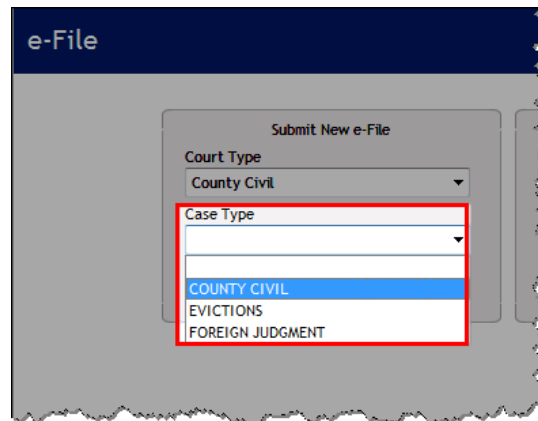
Select Case Type

1. Select the Court Type of the case to be filed from the options in the dropdown list.

2. Based upon the Court Type selected, a pre-determined list of Case Types will be available in the Case Type dropdown list. Select the appropriate option for the case to be filed.

3. Click the **Submit** button to open the **Case Parties** screen.

Add Case Parties

1. The required party types for filing the case will be listed based on the Court Type and Case Type selected.

   Example: If a Common Pleas Civil/Foreclosure case is selected, the required party types will show as *Plaintiff* and *Defendant*.
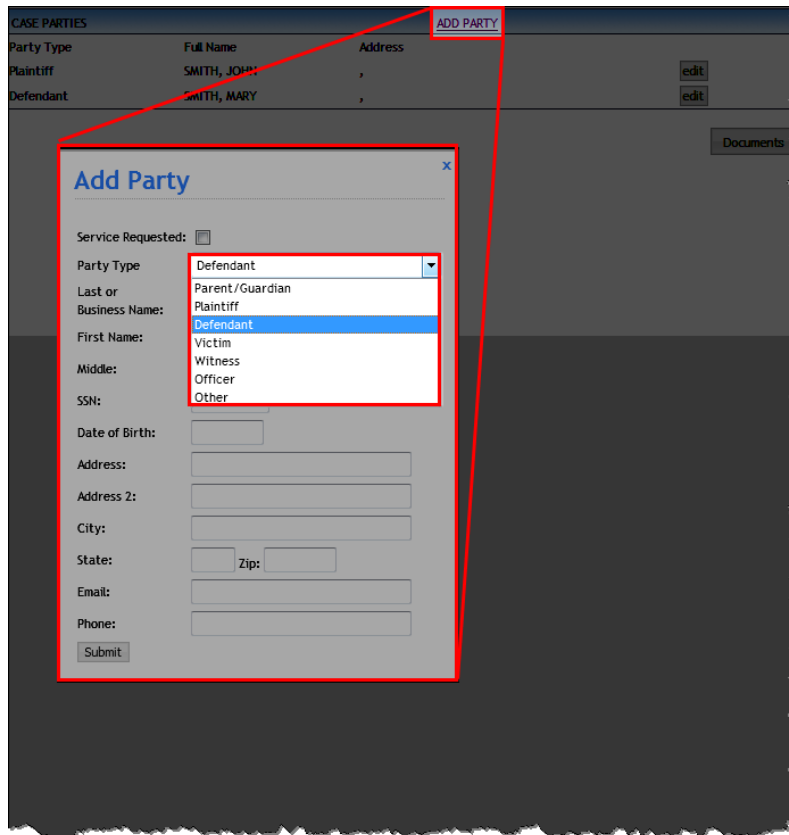

2. Click the **Edit** button associated with each of the required parties in turn to open the **Add Party** window and add the parties.
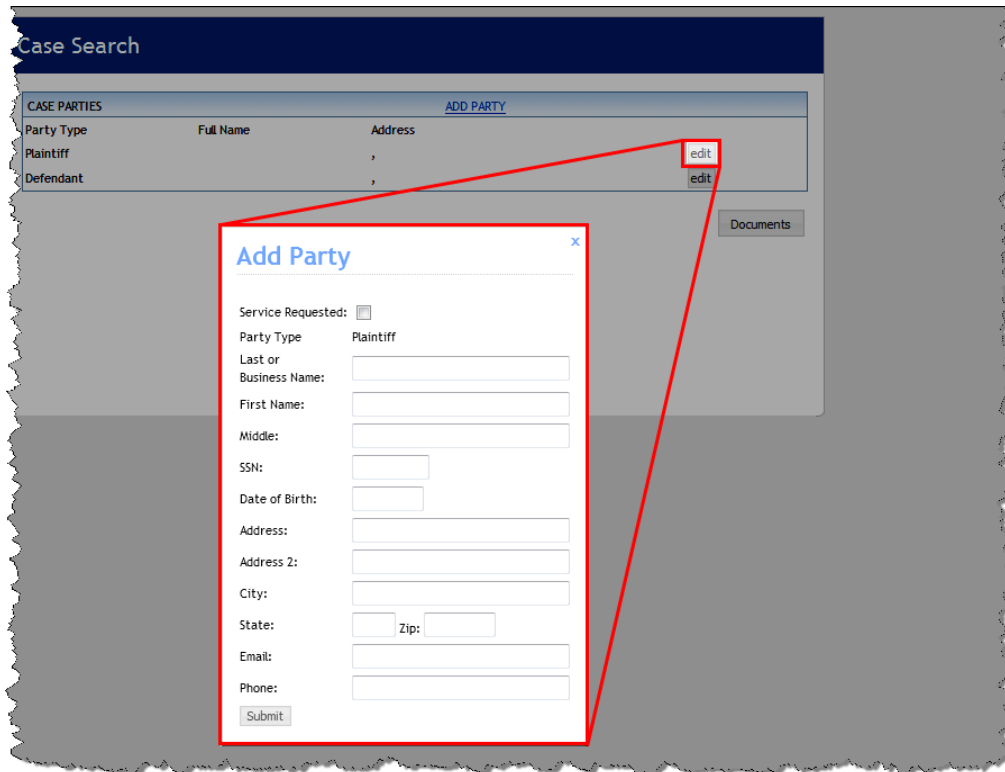
3. The following fields are available. *Last or Business Name* is required.

    a. *Service Requested*: allows a confirmation email to be sent to the party if an email address is provided.

    b. *Party Type*: this field will be pre-populated based upon the selected Court Type/Case Type.

    c. *Last or Business Name*:

    d. *First Name*:

    e. *Middle*:

    f. *SSN*:

    g. *Date of Birth*:

    h. *Address*:

    i. *Address 2*:

    j. *City*:

    k. *State*:

    l. *Zip*:

    m. *Email*:

    n. *Phone*:

4. After all information is populated, click the **Submit** button.

5. Repeat the process for any other required parties.

6. To add additional parties click the **Add Party** button. A list of available party types for the selected Court Type/Case Type will be available in the dropdown list.
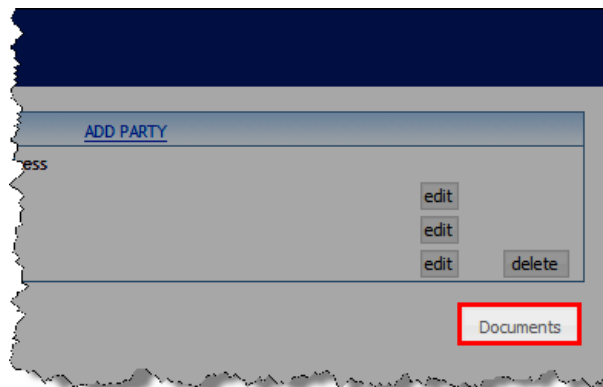
7. Any party entered may be changed using the Edit button associated with the row.

   **Note**: The *Last or Business Name* is the only information required to add a party.

Add Filing Documents

1. Click the **Documents** button to open the **e-File Documents** page.

2. Based on the Court Type/Case Type selected, the required document types for filing the case will be listed.
   Example: If a Common Pleas Civil/Foreclosure case is selected, the required documents will show as *Cover Letter* and *Complaint*. To upload a document, click the **Select File** button.
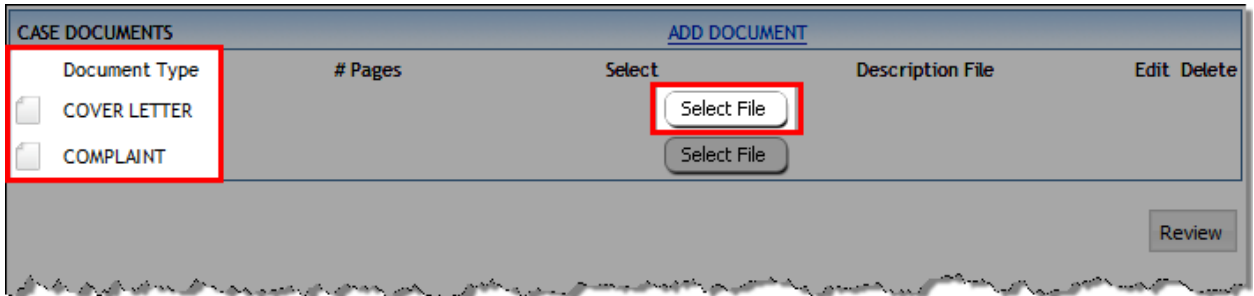
3. Navigate to the location of the electronic document, select the appropriate file and click the **Open** button.
   Note: The accepted file formats are PDFs (.pdf) or TIFFs (.tif).
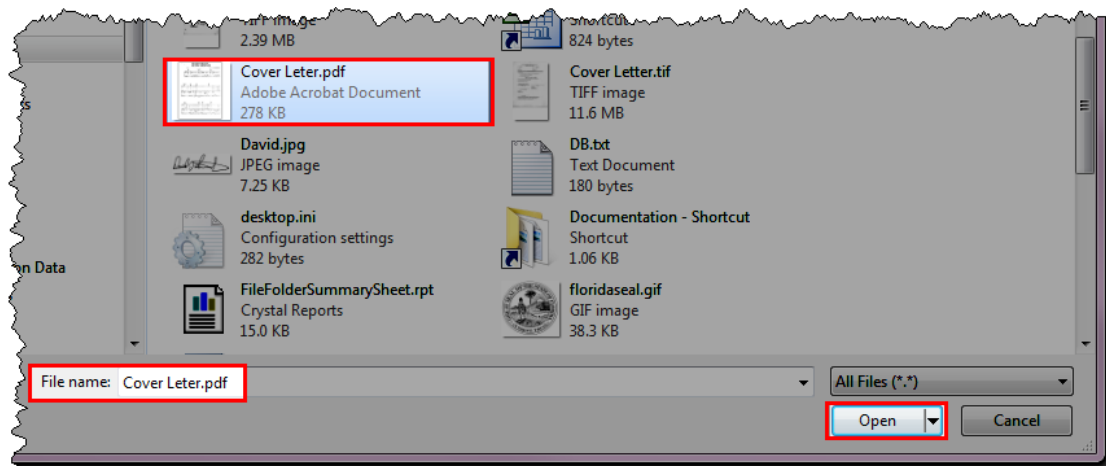

4. The screen will display the name of the selected file along with a field to enter the number of pages in the document. Continue to upload required documents by clicking the **Select File** button next to each row.
   **Note**: The number of pages is required.
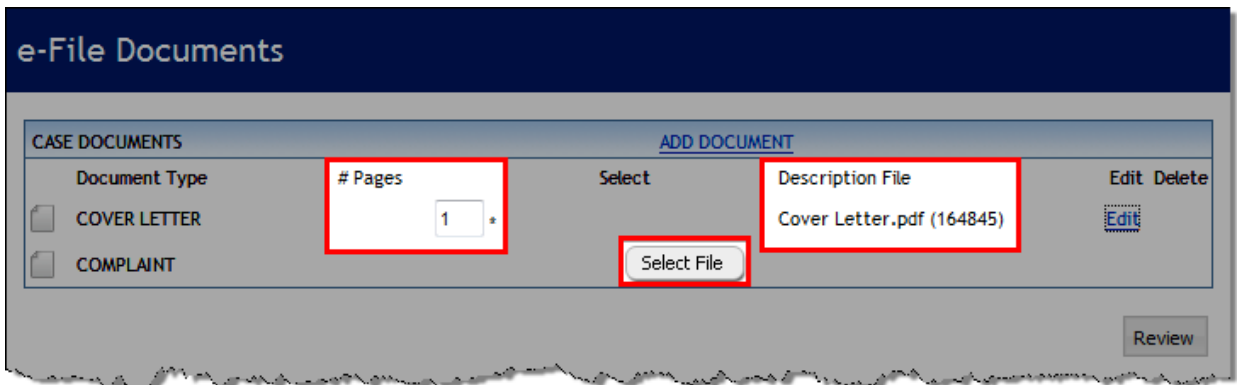
5. To add any additional documents, click the **Add Document** button at the top of the screen. The list of available document types for the type of case being filed will be available in the dropdown.
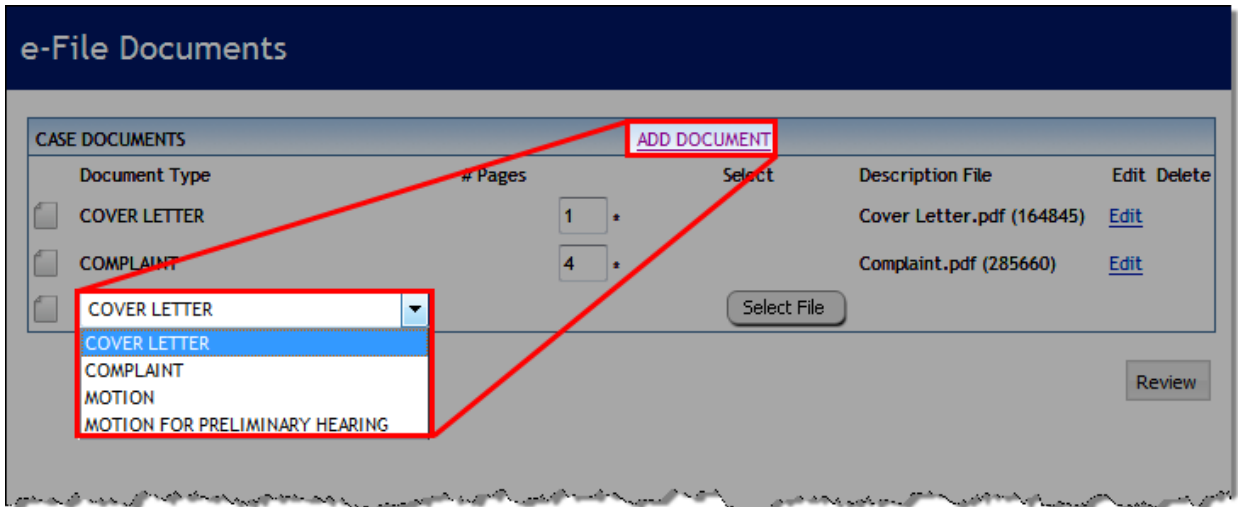
6. Any uploaded document may be replaced with a different document using the **Edit** button. Only documents that are not required may be deleted using the **Delete** button. After all documents associated with the case have been added, click the **Review** button to review the case information.
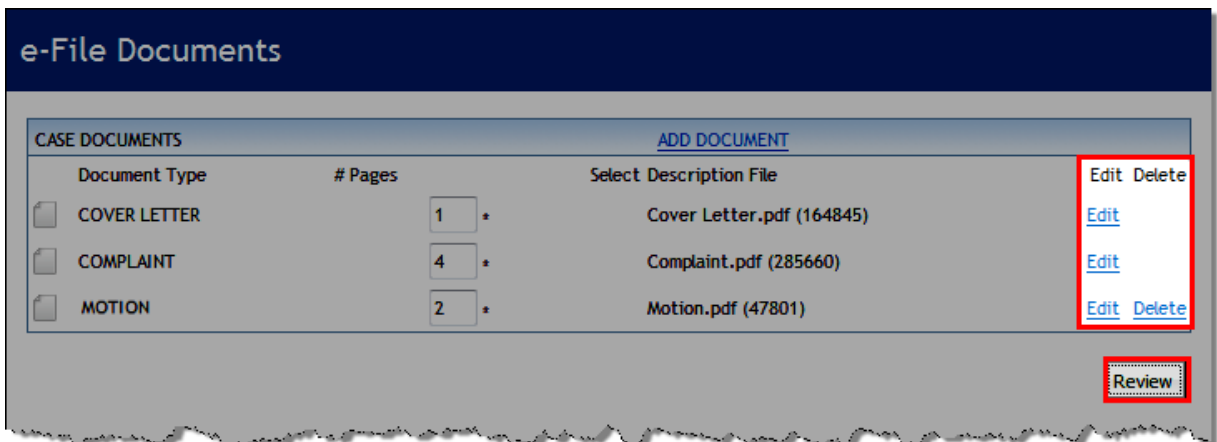
Review Filing

1. The Review & Submit screen will display a summary of all information entered.
   a. There is an Edit link on each section of the screen to allow a return to the applicable section in the filing to adjust information if necessary.
   b. This screen also displays the filing fees associated with filing the case. Select the method of payment, complete the payment information and click the Submit button to file the new case.

2. After the filing is accepted, the e-File Submitted screen with a confirmation number for the filing will open.
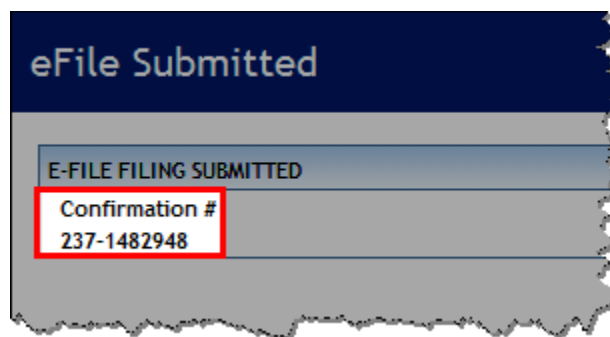
Document Filing to an Existing Case

There several methods by which a new document may be filed to an existing case. This may be done from the e-File Menu or from any case record based on Rights and Roles permissions to file to the case.

Note: Depending on the Rights that are granted, the e-File icon may be available on any case record that can be accessed and is configured for e-Filing. In some instances, only those who are parties on the case may access the case.

From the e-File Menu

Search by Name

1. Navigate to the Benchmark Web homepage and login to the secure access site using an authorized username and password.

1. Enter known information to generate a list of cases from which to choose. The more information entered, the smaller the list of results will be. Click the Advanced Options button to narrow the search even more.
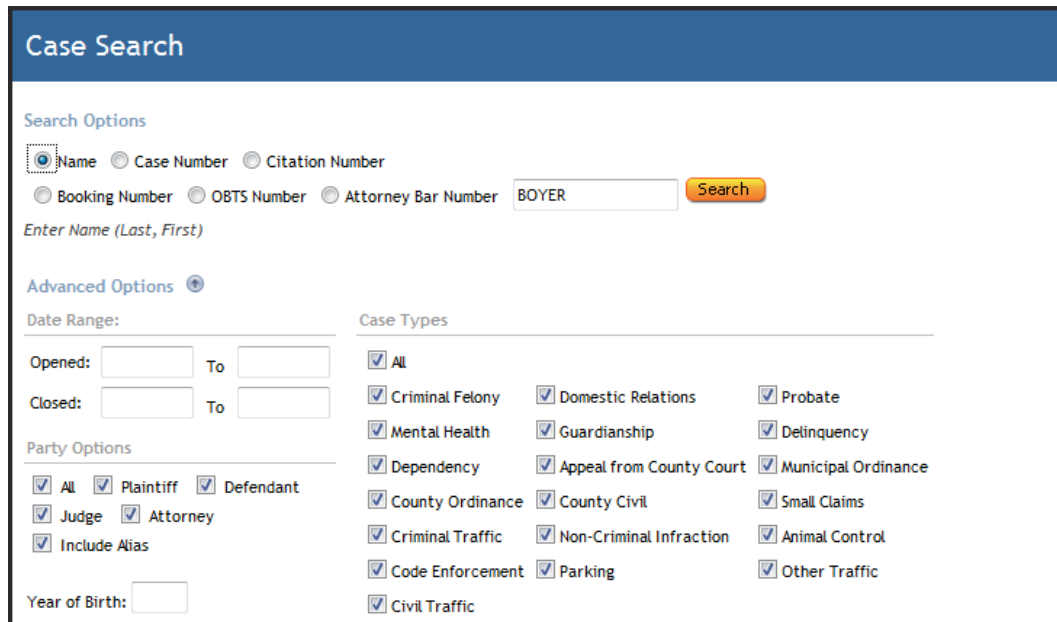
2. The Case Search Results window provides an overview of the cases returned which includes (based on availability from within the case):
   a. Name
   b. Party Type
   c. Case Number
   d. Status
   e. Citation Number
   f. Booking Number

g. E-File Number

3. Click the plus sign (+) to view a summary of a case.

4. Click the View Case button to view the details of a case.

Search by Case Number

5. When the Case Number is used as the search criterion, the case will be opened automatically.

6. Click the **E-FILE** button to open the **e-File to Existing Case** screen.
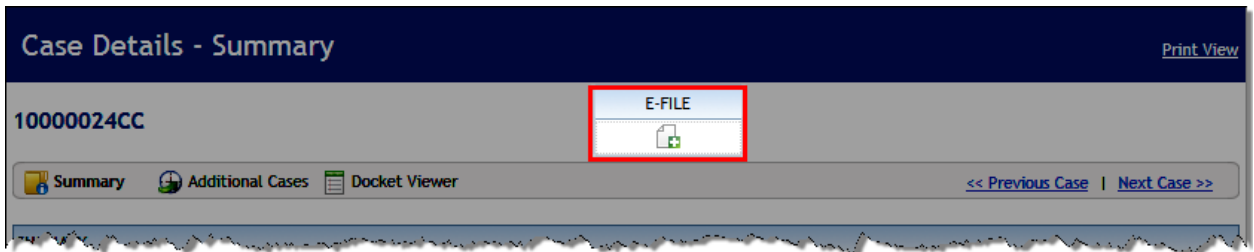
7. Click the **ADD DOCUMENT** button to add documents. Choose the **Document Type** from the dropdown menu.
8. Click the **Select File** button and navigate to the desired file. Choose the file and click the **Open** button.
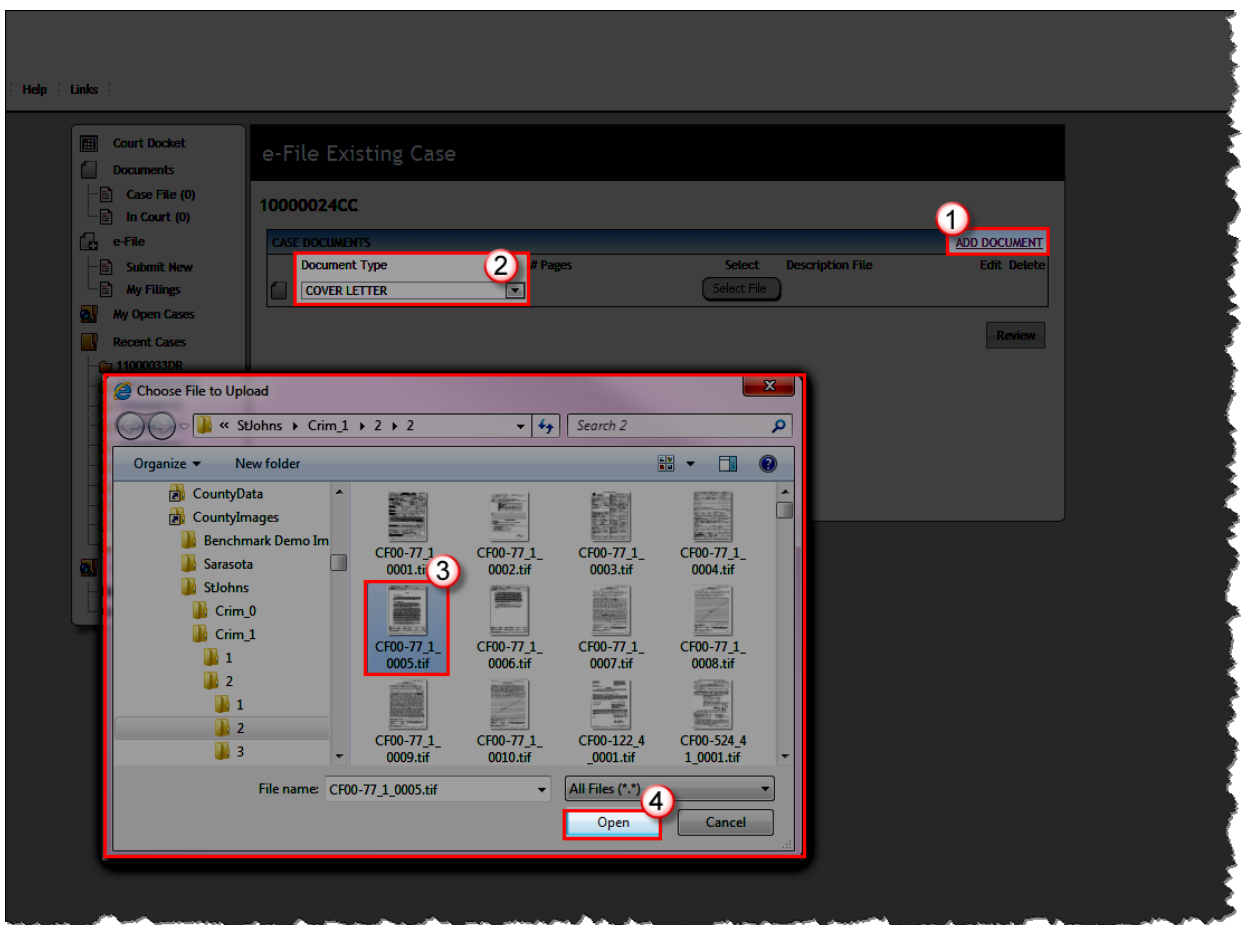
9. After all documents associated with the case have been added, enter the number of pages if necessary and click the **Review** button to review the case information.
   Note: The number of pages will populate automatically for TIFF documents. Click the **Submit** button.
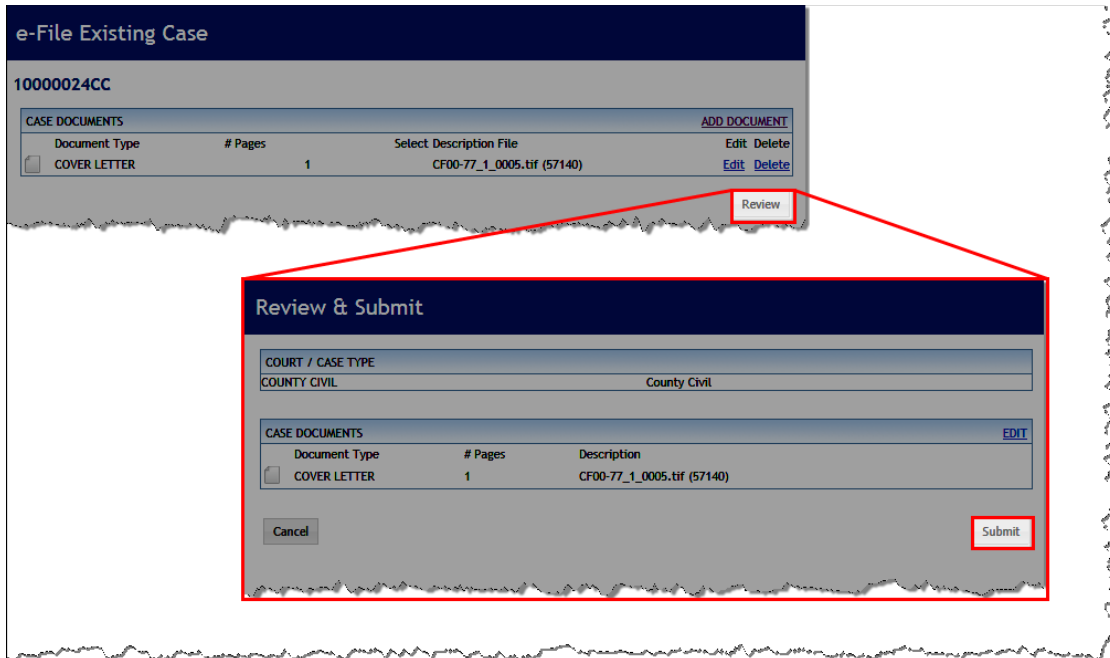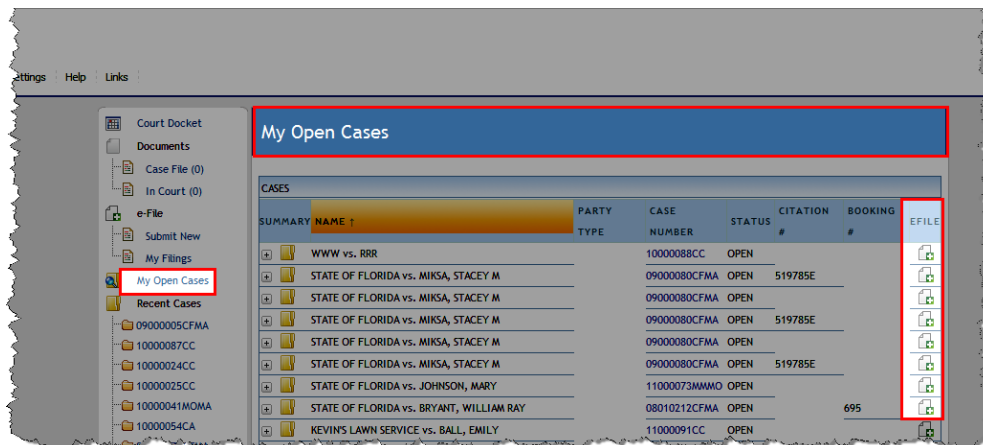
10. The **eFile Submitted** screen opens with the Confirmation number.
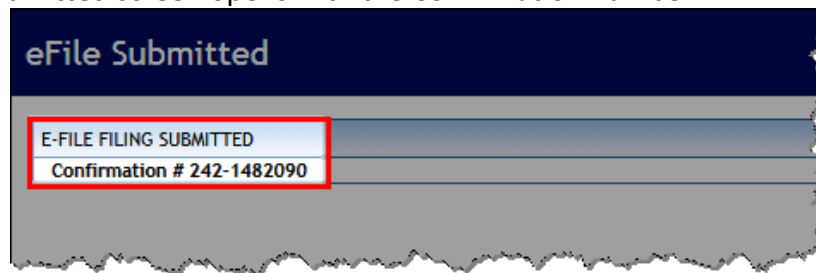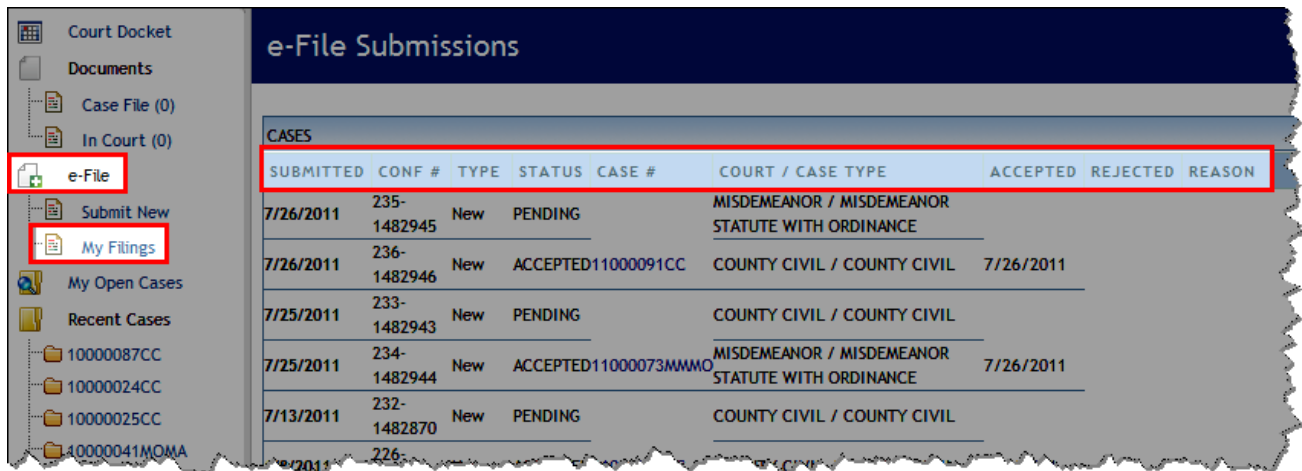

From My Open Cases List

1. Selecting the **My Open Cases** option in the toolbar on the left side of the screen will load a list of all open or reopened cases where the logged in user is the attorney of record. Each case will have an efile button both in the list view and at the top of the case detail.

2. Clicking the e-File icon will open the **e-File to Existing Case** screen. Follow those instructions above to continue.

My Filings List

Once filings have been submitted, the logged in user may review all submissions and their current status from the **e-File > My Filings** menu on the right side of the screen.


Reviewing e-File Submissions in Benchmark

After an electronic filing has been submitted, the submissions may be reviewed and accepted or rejected through the Benchmark application. This workflow is the same regardless of the source of the submission, whether it is from Benchmark Web or another portal.

1. Once logged into the Benchmark client application, navigate to the Case Menu > By List > Pending Cases > Pending e-File Cases/Documents.
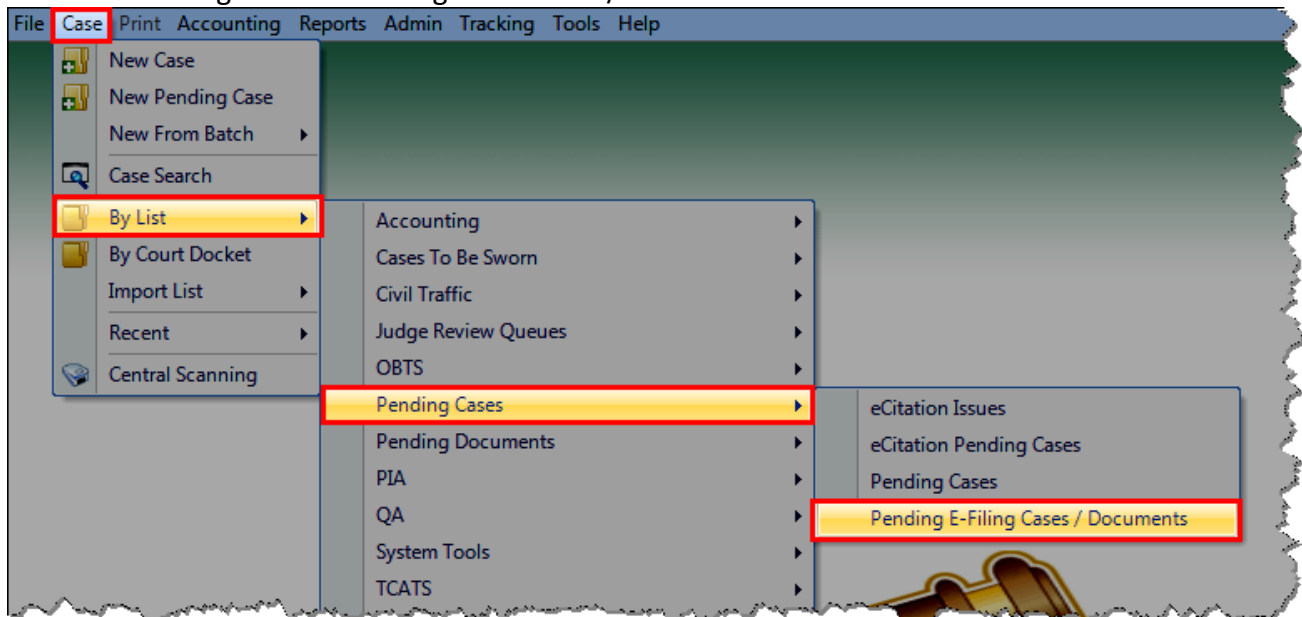
2. This will open a case list of all submissions currently pending review.
3. The case list columns indicate:
   a. EfileID
   b. Confirmation #

    c. Submission Date

    d. eFile Type – (If the filing is a new case or to an existing case)

    e. Court Type

    f. Case Type

    g. Submitted By

    h. Payment Type

    i. Amount Outstanding

    j. Amount Paid

    k. Number of Documents

    l. Number of Parties

4. To begin the review process, double click on a row in the list or highlight the row and select the **Details** button in the bottom toolbar.

New Cases

1. When a new case submission is selected from the list, the e-File Review will have 3 tabs.

    a. The Summary tab displays the basic information on the case:

        i. Submission Date

        ii. Court Type/Case Type

        iii. Payment Information

    b. There are fields available to hold:

        i. Accepted Date

        ii. Rejected Date

        iii. Submitted By

2. The **Parties** Tab does a best possible match search on all of the parties included in the filing. These will be shown in a list at the top of the screen. Details are displayed in the bottom of the screen based on selection in the top screen.

    a. When there are multiple possible matches or no party information entered, an existing party from within the system may be chosen from the **Search Results** section and the corresponding information will be updated in the grid.

    b. If it is determined that the party does not match an existing party (PossibleMatches = 0), the **New** checkbox may be selected and a new party record with a unique PIN will be created.
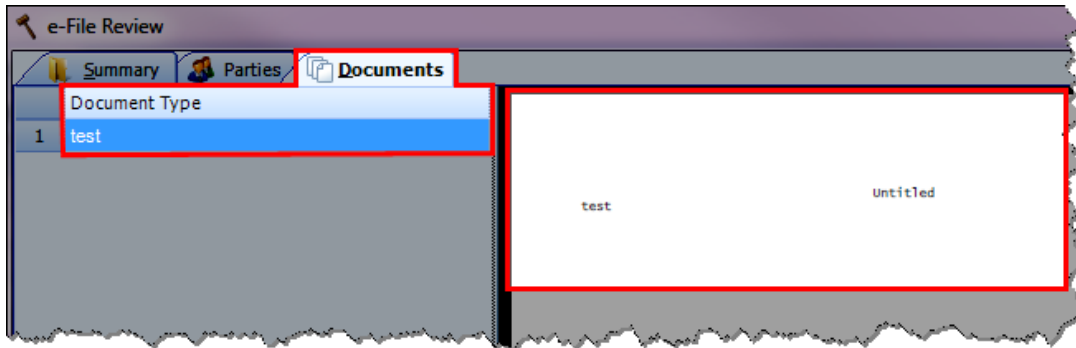

3. The submitted images may be reviewed to make sure they are legible and correctly matched to the document type or docket code on the **Documents** tab.
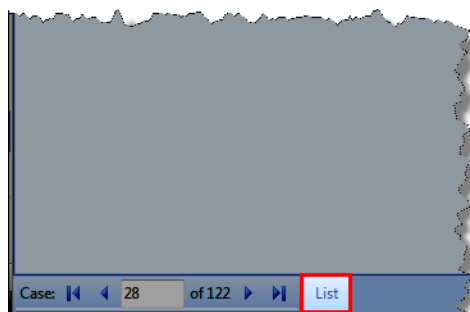
a. After all tabs have been reviewed and the information has been verified, click the **Accept** button at the bottom of the screen to create a new case record with the submitted and reviewed information.

4. The case will be created and opened to allow additional work to be done on the case if needed.
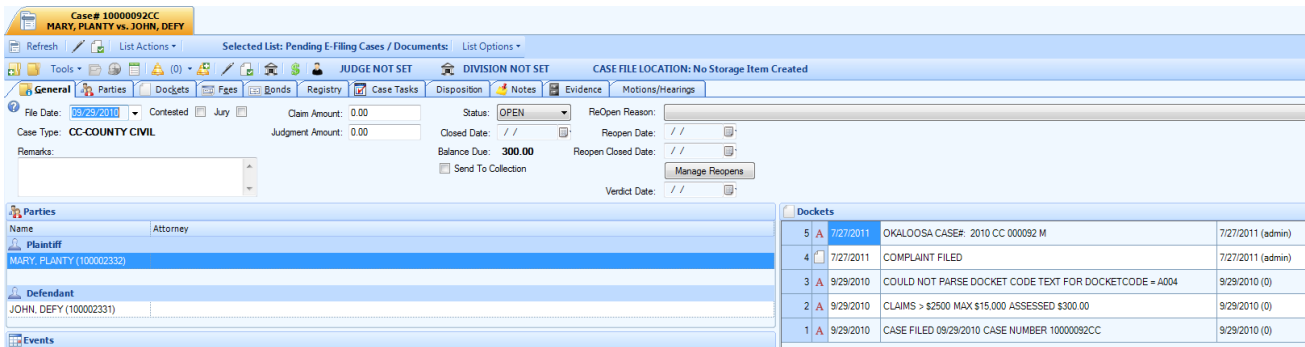
5. To return to the list, select the **List** button in the bottom toolbar

Existing Cases

1. When an existing case submission is selected from the list, the e-File Review will have only 2 tabs. These tabs serve the same functions as for new cases.
    a. The **Summary** tab
    b. The **Documents** tab
2. To return to the list, select the **List** button in the bottom toolbar