



How To Manual

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How To Add a Case Filing

Pre-Requisites

Start by launching CountySuite Civil Court.

At the top-left of the home page, click the **Receiving** button to go to the **Receiving** page.

The screenshot shows the 'Receiving' page in CountySuite Civil Court. The page is titled 'Receiving' and shows 'luke.gatchell | Home'. It has sections for 'Plaintiff' and 'Defendant' with fields for Last Name / Company Name, First, Middle, and Suffix. There are also sections for 'Attorney' and 'Attorney' with similar fields. A 'Payment Information' section includes a checkbox for 'Paid By: Use Attorney / Plaintiff', a 'Last Name / Company Name' field, a 'Contact Category' dropdown, and fields for 'Check Date:' and 'Check No.'. A 'Memo' section for 'Filing Fee' shows a table with columns for Date, Name, Check No., Memo, and Amount, with a total of '\$105.50'. A checkbox for 'Generate Receipt on Add' is checked. At the bottom are 'Add' and 'Add/Goto' buttons. Numbered callouts point to specific fields: 1 points to the 'Case No.' field; 2 points to the 'Category' dropdown; 3 points to the 'Primary' Plaintiff fields; 4 points to the 'Primary' Defendant fields; 5 points to the 'Attorney' Plaintiff fields; 6 points to the 'Paid By' checkbox; 7 points to the 'Check Date' field; 8 points to the 'Amount' field for the filing fee; 9 points to the 'Generate Receipt on Add' checkbox; and 10 points to the 'Add/Goto' button.

Step-by-step

1. Enter the Case Number associated with this Case Filing (or part of the case number) and press **ENTER** (or click on the search icon with the magnifying glass) to see if this case is already in the system.
 - o If the Case is NOT in the system, the popup status bar at the top of the page will indicate that no case with this number has been found.
 - o If the Case is in the system, a list of Cases that match the text that was entered will be presented to the user. Selecting one of the Cases from the list will automatically initialize the Case participant information on this page.

2. Next choose the Category for this Case Filing from the dropdown.
 - o The category chosen will automatically set the expected Filing Fee (under the Payment Information section, next to the Add Payment button). This value is configured specifically for the installation county and will be based on their fee schedule.
3. Next enter the last name of the primary plaintiff.
 - o Begin by entering part of the name (especially in the case of a company name), and then press **ENTER** (or click on the search icon) to see if this contact is already in the system. The name can be searched by entering part of the first name and part of the last name (ie. "Jo Do" will find a match for "John Doe" or "Joseph Dougherty"). The name can also be entered with the last name first (ie. "Do, Jo" which will find the same matches).
 - o If the individual is not already in the system, the popup status bar at the top of the page will indicate this. Finish entering the full name of the plaintiff.
 - o If the individual is already in the system, a set of search results will be displayed. **Select** one of the contacts from this list, or, if none of the results is the correct individual, press **Cancel** and finish entering the full name of the plaintiff.
4. Next enter the last name of the defendant.
 - o Again, enter part of the name and press ENTER to see if the defendant is already present in the system.
 - o Either select one of the contacts returned by the search, or finish entering the full name of the defendant.
5. Next, enter the name of the attorney(s).
 - o Again, enter part of the name and press ENTER to see if the plaintiff attorney is already present in the system.
 - o Either select one of the contacts returned by the search, or finish entering the full name of the plaintiff attorney.
 - o We recommend that the user enter the name of the plaintiff attorney firm that appears on the Filing Fee check. Individual attorneys can be entered later as part of the Case information, but entering the firm here allows the user to select the "Use Attorney / Plaintiff" checkbox under the Payment Information, which makes the receiving process more efficient.
 - o If there is a defendant attorney, enter the information in the same way as above.
6. Next enter the Payment Information. If the filing fee check is provided by the Plaintiff Attorney, then keep the "Use Plaintiff / Attorney" checkbox checked. If not, uncheck this box and enter information for the Payer.

- The payer name is remembered by the system and is used later to select the default Payee when writing the refund check when closing the Case Filing.

7. Next enter the check date, and the check number.

- Although the expected advance fee amount is entered, the user can override this amount by typing in any number.
- The memo field text can also be changed to add any additional information.

8. Click the "Add Payment" button to add this check to the payment grid.

- If an additional check has been sent by the attorney, the user may enter another check date and another check number and a new amount and click the "Add Payment" button again.
- If cash or some other form of payment has been received, select the proper choice from the dropdown and enter the associated number (for things like money orders, etc.)
- The user may enter an unlimited number of checks for the advance fee.

9. If the user wishes to generate a receipt right now and refresh the page so a new filing can be entered, check the "Generate Receipt on Add" checkbox, and click the "Add" button. This is usually done when using this screen at a front desk where a receipt is required immediately.

- A receipt can be created at any time later by going to the Ledger for this Case Filing, selecting the deposit entry and printing the receipt.

10. If the user wishes to add this Case Filing to the system, and then be taken to the Case page for this new filing, click the "Add/Goto" button.

- This takes the user to the Case Details page where additional details (such as address information) about the plaintiff, defendant and attorney information can be entered.
- From the Case Details page, the user can also edit the details of any Case Filings associated with this case (such as the one that was just added by following the process above)

Follow-up

Once the process above has been followed, this Case Filing has been successfully added to the system and can be searched for from the main page (using the Case Number, or names of the case participants).

The Filing Fee has also been entered into the Ledger for this Case Filing, and is also awaiting verification to be deposited into the Escrow/Checking Account. (See "How to Verify and Deposit Checks")

How To Add Case Details

Pre-Requisites

This tutorial assumes that the Case Filing has already been added to the system through the Receiving page. If the Case has not yet been added, please use the [How to Add a Case Filing](#) tutorial first.

Start by launching CountySuite Civil Court. Search for the Case by entering the Case Number or one of the names of the case participants. Click the search results row to go to the **Case Details** page.

The screenshot shows the 'Case Details' page in CountySuite Civil Court. The page is titled 'Case Details' and shows a case between 'AMERICAN GENERAL CONSUMER DISCOUNT COMPANY' vs. 'LOWRY WENDY S'. The Plaintiff information includes a name and address for 'AMERICAN GENERAL CONSUMER DISCOUNT COMPANY'. The Defendant information includes a name and address for 'LOWRY WENDY S'. The Plaintiff Attorney is 'GREGORY C. HOOK' with an address in Waynesburg, PA. The Defendant Attorney section is empty. The 'Case Details' section includes fields for SubCategory (set to 'Mortgage Foreclosure: Residential'), Filing Options (checkboxes for Pro Se, Class Action Suit, Money Damages, Outside Arbitration Limits, and MDJ Appeal), Disposition (Date, Category, AOPC Category), and Notes (a large text area). The 'Case Docket Entries' section lists several entries: 'Praecipe For Writ Of Execution (Mortgage Foreclosure)', 'JUDGMENT ENTERED BY DEFAULT IN THE AMOUNT OF \$ 33,324.47 PLUS I...', 'PRAECIPE FOR DEFAULT JUDGMENT FILED BY GREGORY C. HOOK, ESQUIRE.', 'NOTICE OF IMPORTANT NOTICE FILED BY GREGORY C HOOK, ESQUIRE.', 'SHERIFF'S RETURN: SHOWING THAT ON THE 15TH DAY OF JANUARY, 1999...', 'SHERIFF'S RETURN: SHOWING THAT ON THE 15TH DAY OF JANUARY, 1999...', and 'COMPLAINT IN MORTGAGE FORECLOSURE FILED BY GREGORY C. HOOK, FSO...'. The 'Case Judgments' section shows two entries: 'DEFAULT JUDGMENT' and 'DEFAULT JUDGMENT', both dated 3/8/1999, with an amount of \$33,324.47. The 'Case Filing Ledgers' section shows a single entry for '1/7/1999 Civil: Real Property / Mortgage Foreclosure: Residential'.

1 Add / Edit 2 SubCategory: Mortgage Foreclosure: Residential 3 Filing Options: Pro Se Class Action Suit Money Damages Outside Arbitration Limits MDJ Appeal 4 Disposition: Date: Select Date Category: < Select Category > AOPC Category: < Select Category > 5 Notes 6 Reference Number(s) 7 Remarks (not visible to the public) 8 9 Add New Docket Entry 10 Add New Judgment 11

Date	Category	Description
7/2/1999	Praecipe For Writ Of Execution (Mortgage Foreclosure)	PRAECIPE FOR WRIT OF EXECUTION (MORTGAGE FORECLOSURE) AND VERIF...
3/25/1999	Praecipe For Writ Of Execution (Mortgage Foreclosure)	JUDGMENT ENTERED BY DEFAULT IN THE AMOUNT OF \$ 33,324.47 PLUS I...
3/25/1999	Judgment Entered By Default	PRAECIPE FOR DEFAULT JUDGMENT FILED BY GREGORY C. HOOK, ESQUIRE.
2/17/1999	Praecipe For Default Judgment	NOTICE OF IMPORTANT NOTICE FILED BY GREGORY C HOOK, ESQUIRE.
2/9/1999	Notice	SHERIFF'S RETURN: SHOWING THAT ON THE 15TH DAY OF JANUARY, 1999...
2/9/1999	Sheriff's Return	SHERIFF'S RETURN: SHOWING THAT ON THE 15TH DAY OF JANUARY, 1999...
1/7/1999	Sheriff's Return	COMPLAINT IN MORTGAGE FORECLOSURE FILED BY GREGORY C. HOOK, FSO...

Date	Name	Description	Amount
3/8/1999	LOWRY WENDY S	DEFAULT JUDGMENT	\$33,324.47
3/8/1999	LOWRY DAVID A	DEFAULT JUDGMENT	\$33,324.47

Date	Type	Description
1/7/1999	Civil: Real Property / Mortgage Foreclosure: Residential	

Step-by-step

1. Use the Add/Edit buttons next to the case participants to add further details (addresses, phone numbers) to the case. Additional plaintiffs, defendants and attorneys can also be added this way. (See the [How to Add Case Participant Details](#) tutorial for more information on this process).
2. Some filing types will have sub-categories, and others will not. If the Case can have a sub-category, a dropdown list will show the available choices. Select the sub-category (if applicable) for the Case.
3. Enter the AOPC filing options (if applicable) for the Case.
4. If the Case is being closed, enter the Disposition date, the Disposition category, and the AOPC Disposition Category
5. Enter any Notes pertaining to this Case. These notes are viewable to the public.
6. Enter any alternate Reference Numbers for this Case. This would be the place to enter any related Case numbers, such as when a case has been consolidated, or there is a superior court case number.
7. Enter any Remarks pertaining to this Case. These notes are NOT viewable to the public.
8. Click the "Save" button to save any changes made to this page
9. Click "Add New Docket Entry" to add any Docket Entries to this Case. (See [How To Add Docket Entry Details](#))
10. Click "Add New Judgment" to add any Judgments to this Case. (See [How To Add Judgment Details](#))
11. Click a row under "Case Filing Ledgers" to see the deposits, costs and fees associated with a particular Case Filing on this Case. Here the user can also make adjustments to any fee distributions (such as additional copy fees or overpayments).

Follow-up

This completes the entry of Case Details. At any point in time, the user can follow the steps above to look-up and go to the Case, and then add additional information (either Notes, or Docket Entries or Judgments)

To view all the Docket Entries, click the "Print Dockets" button in the upper right corner of the page.

To view a specific Docket Entry, click on any of the rows in the Case Docket Entries section.

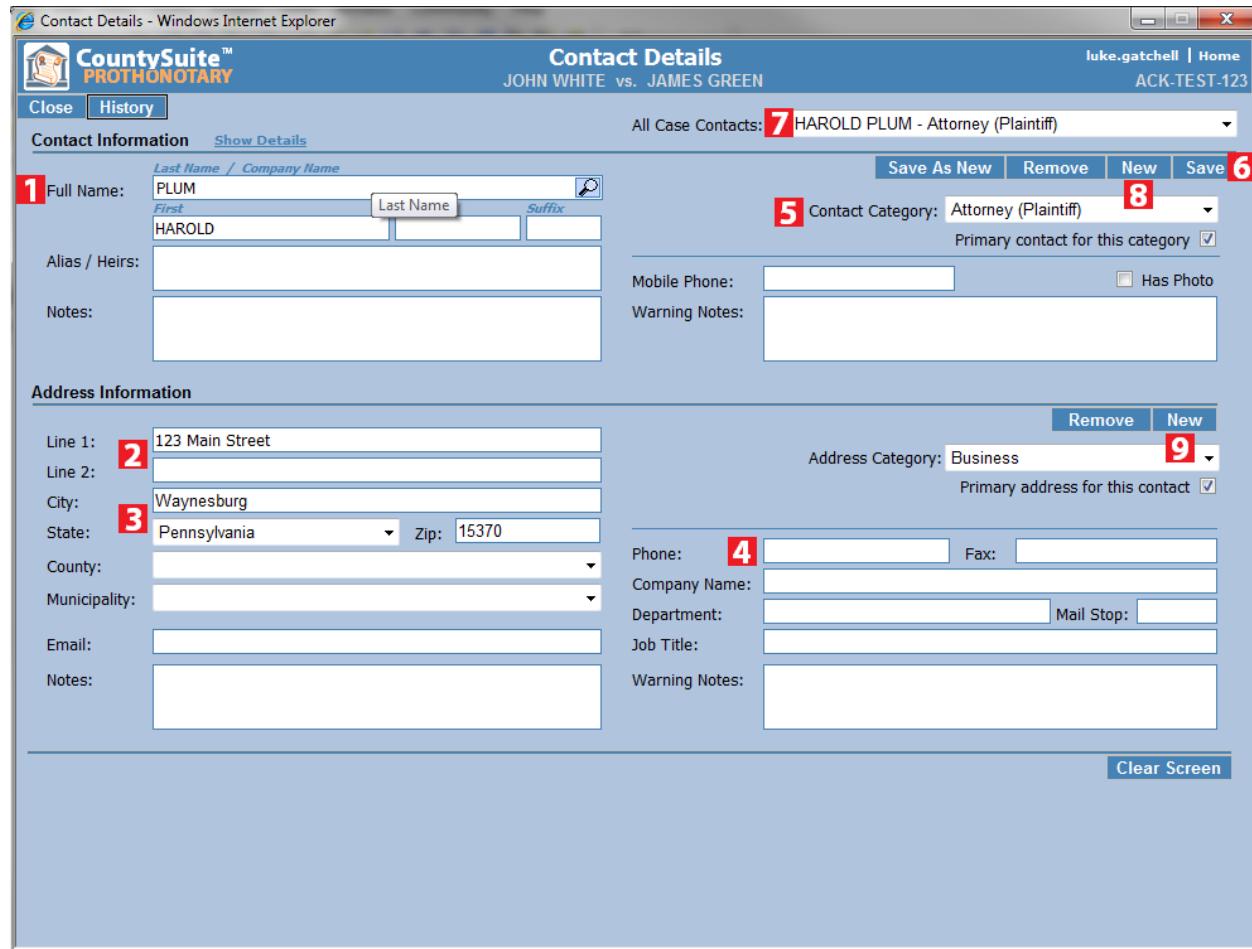
To view the scanned images for a Docket Entry, click on the paperclip icon on any of the rows in the Case Docket Entries section. The paperclip will only show for Docket Entries that have attachments.

To view a specific Judgment, click on any of the rows in the Case Judgments section.

How To Add Case Participant Details

Pre-Requisites

Start by launching CountySuite Civil Court. Search for a Case by entering the Case Number or one of the names of the Case Participants. Click the search results row to go to the **Case Details** page. Click on one of the “Add/Edit” buttons next to a Case Participant section to go to the **Contact Details** page.



The screenshot shows the 'Contact Details' page for a case involving JOHN WHITE vs. JAMES GREEN. The 'Contact Information' tab is selected. Key fields include:

- Full Name:** PLUM (Last Name), HAROLD (First)
- Alias / Heirs:** (empty)
- Notes:** (empty)
- Contact Category:** Attorney (Plaintiff)
- Mobile Phone:** (empty)
- Address Information:**
 - Line 1:** 123 Main Street
 - Line 2:** (empty)
 - City:** Waynesburg
 - State:** Pennsylvania (3) Zip: 15370
 - County:** (empty)
 - Municipality:** (empty)
 - Email:** (empty)
 - Notes:** (empty)
- Address Category:** Business
- Primary address for this contact:** (checkbox checked)
- Phone:** (4) (empty)
- Company Name:** (empty)
- Department:** (empty)
- Job Title:** (empty)
- Mail Stop:** (empty)
- Warning Notes:** (empty)

Step-by-step

1. Verify that the Full Name is correct. (Enter Last, First, Middle and Suffix information).
 - o If entering a new Case Participant (after clicking the “New” button), begin by entering part of the name (especially in the case of a company name), and then press **ENTER** (or click on the search icon) to see if this contact is already in the system. The name can be searched by entering part of the first name and part of the last name (ie. “Jo Do” will find a match for “John Doe” or “Joseph Dougherty”). The name can also be entered with the last name first (ie. “Do, Jo” which will find the same matches).

- If the individual is not already in the system, the popup status bar at the top of the page will indicate this. Finish entering the full name of the Case Participant.
- If the individual is already in the system, a set of search results will be displayed. **Select** one of the contacts from this list, or, if none of the results is the correct individual, press **Cancel** and finish entering the full name of the Case Participant.

2. Enter the Address information, beginning with Line 1.
3. Enter the City, State and Postal Code
4. Enter a phone number (if applicable)
5. Make sure the Contact Category is correct for how this Case Participant should be related to this Case. (ie. Plaintiff, Defendant, Plaintiff Attorney, etc.)
6. Click the “Save” button to save any changes made to this page.
7. (Optional) Use the “All Case Contacts” dropdown list at the top-right of the page to select another Case Participant associated with this case, and then repeat the steps above to update the information for that Case Participant.
8. (Optional) Click the “New” button under Contact Information to clear this page, and then repeat the steps above to associate another contact with this Case.
9. (Optional) Click the “New” button under Address Information to clear the address, and then repeat steps 2-6 above to associate another address with this Contact.

Follow-up

Click the “Close” button to return from this page to the **Case Details** page.

How To Add Docket Entry Details

Pre-Requisites

This tutorial assumes that the Case Filing has already been added to the system through the Receiving page. If the Case has not yet been added, please use the [How to Add a Case Filing](#) tutorial first.

Start by launching CountySuite Civil Court. Search for the Case by entering the Case Number or one of the names of the case participants. Click the search results row to go to the **Case Details** page. Click on “Add New Docket Entry” to go to the **Docket Event Details** page.

Docket Event Details - Windows Internet Explorer

CountySuite™
PROTHONOTARY

Docket Event Details
BENJAMIN HENDERSON vs. ALAN DAVID DR
AD-71-1997

Event Details

1 Event Date: 2/10/1997

2 Event Category: Judgment From Docket Of District Justice

3 Notes: JUDGMENT FROM DOCKET OF DISTRICT JUSTICE IN THE AMOUNT OF \$219.61 ENTERED AGAINST THE DEFENDANT. NOTICE OF ENTRY OF JUDGMENT TO DEFENDANT.

4 Delete New Save

5 Add New Attachment

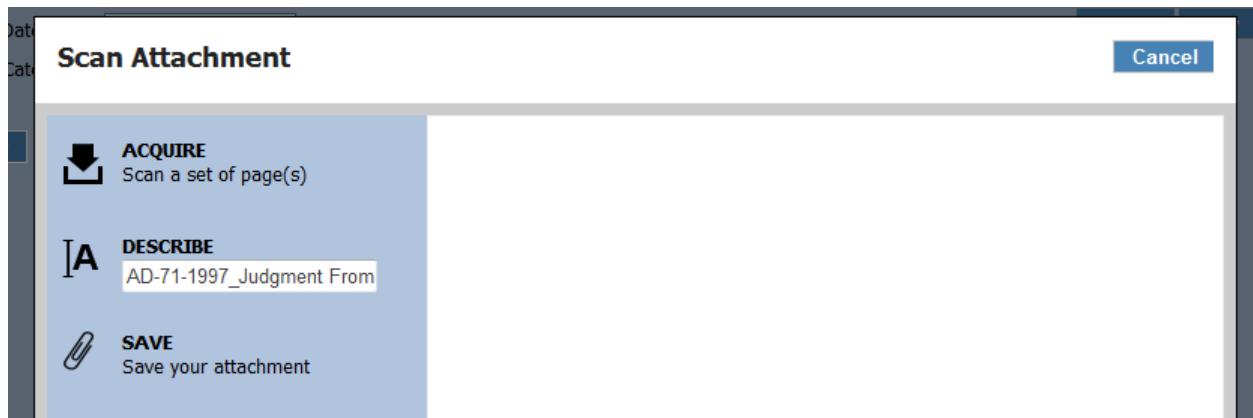
	Date	Description	Pages
<input type="checkbox"/>	12/5/2012 11:57:37 AM	AD-71-1997_Judgment From Docket Of District Justice_12052012115727	7

Delete Selected

Step-by-step

1. Specify the Date of the Docket Event
2. Select the Category of the Docket Event
3. Enter any text associated with the Docket Event
4. Click the “Save” button to save any changes made to this page

5. (Optional) Click “Add New Attachment” to scan document images and associate them with this Docket Event.



- Click “Acquire”, or press the “A” key to start the scanning process. Click “Acquire”, or press the “A” key again to scan additional sets of documents.
- (Optional) Click on the edit box below the “Describe” heading, or press the “D” key to enter a description of the scanned image(s).
- Click “Save”, or press the “S” key to Store the image as an attachment for this Docket Event.

Follow-up

To **View** the scanned images for a Docket Event, click on any of the rows in the Docket Event Attachments section.

To **Delete** the scanned images for a Docket Event, click the checkbox next to the scanned attachment, and click the “Delete Selected” button below the Docket Event Attachments grid.

Click the “Close” button to return from this page to the **Case Details** page.

How To Add Judgment Details

Pre-Requisites

This tutorial assumes that the Case Filing has already been added to the system through the Receiving page. If the Case has not yet been added, please use the [How to Add a Case Filing](#) tutorial first.

Start by launching CountySuite Civil Court. Search for the Case by entering the Case Number or one of the names of the case participants. Click the search results row to go to the **Case Details** page. Click on “Add New Judgment” to go to the **Judgment Details** page.

The screenshot shows the 'Case Judgment Details' page for a case between BENJAMIN HENDERSON and ALAN DAVID DR. The 'Judgment Details' section is displayed, with the following fields populated:

- 1 Filing Date:** 2/10/1997
- 2 Amount:** \$219.61
- 3 Judgment On:** ALAN DAVID DR, WAYNESBURG EYE CENTER, 1865 E HIGH STREET, WAYNESBURG, PA 15370
- 4 Notes:** JUDGMENT/DJ

Other visible elements include:

- Add / Edit** button
- Delete** button
- New** button
- Save** button
- Print Notice** link
- Case ID:** AD-71-1997
- Close** button
- CountySuite™ PROTHONOTARY** logo
- Judgment Details** section header
- < Select Default Text >** dropdown

Step-by-step

1. Specify the Date of the Judgment
2. Enter the Amount of the Judgment
3. Select the Case Participant to whom the Judgment is applied.
 - o This can be done by selecting from the dropdown list of Case Participants

- This can also be done by clicking on the “Add/Edit” button just above the dropdown list. This will take the user to the Contact Details page where a new Contact can be entered, or looked up from within the system.

4. Enter any text description associated with the Judgment
5. Click the “Save” button to save any changes made to this page.

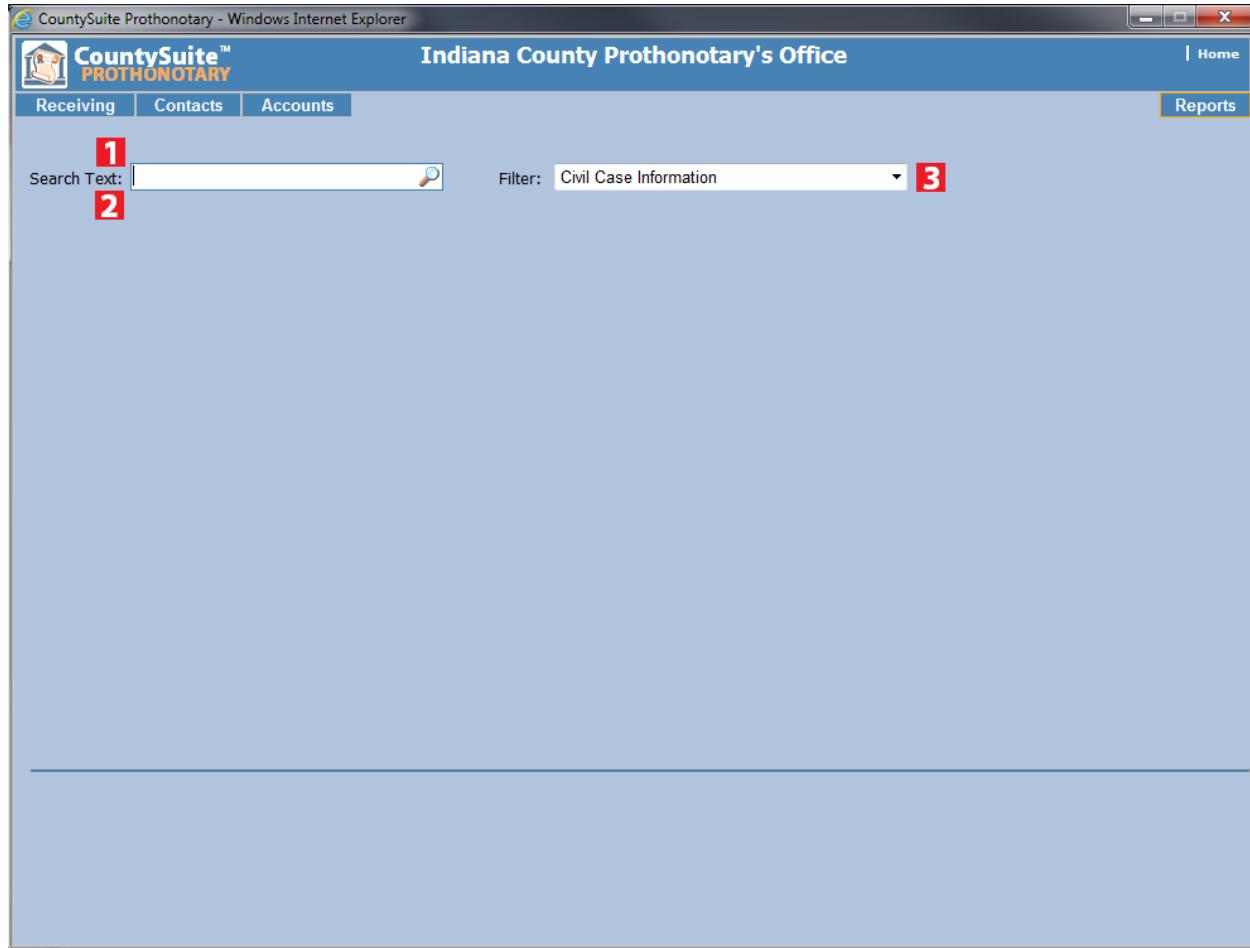
Follow-up

Click the “Close” button to return from this page to the **Case Details** page.

How To Search for a Case

Pre-Requisites

Start by launching CountySuite Civil Court.



Step-by-step

1. Enter the name of a Case Participant in the Search Text field.
 - o Begin by entering part of the name (especially in the case of a company name), and then press **ENTER** (or click on the search icon) to see if there are any cases associated with the name.
 - o The name can be searched by entering part of the first name and part of the last name (ie. "Jo Do" will find a match for "John Doe" or "Joseph Dougherty"). The name can also be entered with the last name first (ie. "Do, Jo" which will find the same matches).
 - o If there are no cases related to this name, a popup status bar at the top of the page will indicate this.

- If there is a case in the system related to this name, a set of search results will be displayed. Click on the row that contains the Case you are interested in. This will move the user to the **Case Details** page for this Case.

2. Enter part (or all) of the Case Number in the Search Text field.

- Begin by entering any part of the Case Number, and then press **ENTER** (or click on the search icon) to see if there are any cases associated with this number.
- If there is a case in the system related to this number, a set of search results will be displayed. Click on the row that contains the Case you are interested in. This will move the user to the **Case Details** page for this Case.

3. Change the Filter to limit the cases and fields that will be included in the search.

- The Civil Case Information filter will search Case Numbers and Case Participant names for all General Index cases.
- The Judgment Information filter will search Case Numbers and Case Participants names for all Judgment Index cases. Results will only be returned if a Judgment is present on the Case.
- The Contact Addresses Only filter will search only for matches in the address of a Case Participant. Results will include cases that are linked to the person whose address matches the search text.
- The Reference Numbers filter only searches the Reference Number field, and returns Cases that match the search text. These fields generally hold Case Numbers that link a particular case to another case. (Such as consolidated cases, or superior court cases).

Follow-up

Click on a row in the search results to move to the **Case Details** page for the selected Case.