



Auto-Accept Review & Press Review Tool

07/01/2022

Auto-Accept Review

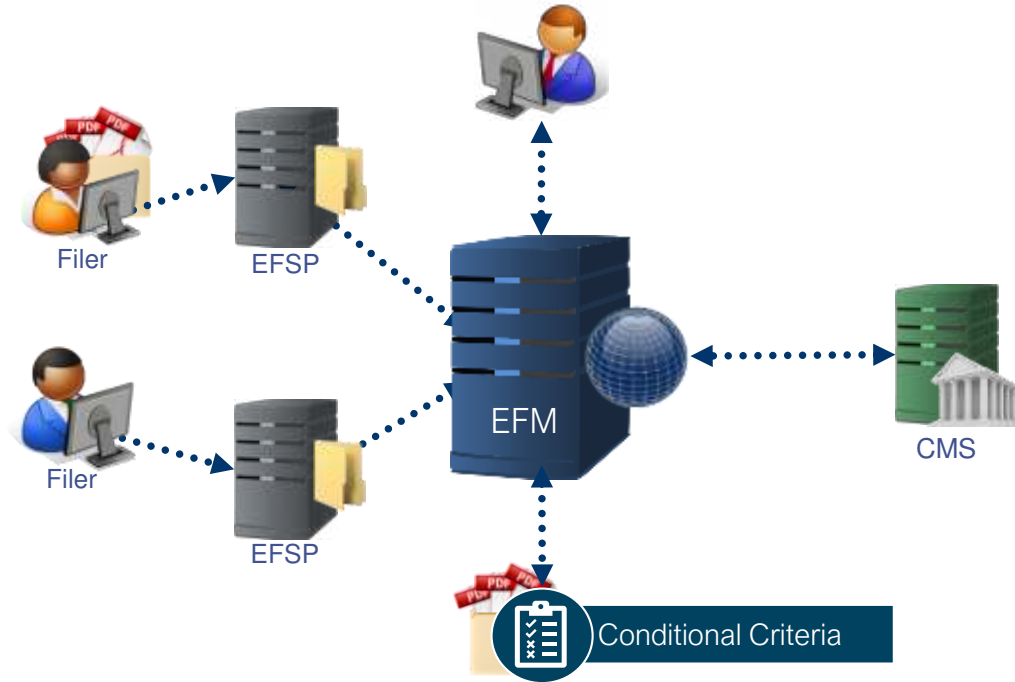
eFiling function that allows clerks to automatically accept filings if the filing matches locally-configured criteria (conditions)

Conditions can be configured based upon:

- Filing Firms
- Filing Codes
- Filings with/without Financials
- Filing Source (EFSP)
- Additional Services
- Judicial Officers
- Party Types
- And more...

Reviews Overview														
ID	Product ID	Client	Location	Issue	First Date	First Incident	Count	Last Date	Status	Notes	Resolution	Owner	Assignee	Link
Issue 1	1000001	John	1000001	Subscribed	2023-01-01 10:00 AM	Subscription purchase	1	2023-01-01 10:00 AM	Active	Initial setup	Issue resolved	John Doe	John Doe	View Details
	1000002	John	1000001	Unsubscribed	2023-01-02 11:00 AM	Not an existing feature	1	2023-01-02 11:00 AM	Active	Not an existing feature	Issue resolved	John Doe	John Doe	View Details
	1000003	John	1000001	Unsubscribed	2023-01-03 12:00 PM	Not an existing feature	1	2023-01-03 12:00 PM	Active	Not an existing feature	Issue resolved	John Doe	John Doe	View Details
Issue 2	1000004	John	1000001	Subscribed	2023-01-04 13:00 PM	Subscription purchase	1	2023-01-04 13:00 PM	Active	Initial setup	Issue resolved	John Doe	John Doe	View Details
	1000005	John	1000001	Unsubscribed	2023-01-05 14:00 PM	Not an existing feature	1	2023-01-05 14:00 PM	Active	Not an existing feature	Issue resolved	John Doe	John Doe	View Details
	1000006	John	1000001	Unsubscribed	2023-01-06 15:00 PM	Not an existing feature	1	2023-01-06 15:00 PM	Active	Not an existing feature	Issue resolved	John Doe	John Doe	View Details
Issue 3	1000007	John	1000001	Subscribed	2023-01-07 16:00 PM	Subscription purchase	1	2023-01-07 16:00 PM	Active	Initial setup	Issue resolved	John Doe	John Doe	View Details
	1000008	John	1000001	Unsubscribed	2023-01-08 17:00 PM	Not an existing feature	1	2023-01-08 17:00 PM	Active	Not an existing feature	Issue resolved	John Doe	John Doe	View Details
	1000009	John	1000001	Unsubscribed	2023-01-09 18:00 PM	Not an existing feature	1	2023-01-09 18:00 PM	Active	Not an existing feature	Issue resolved	John Doe	John Doe	View Details
Issue 4	1000010	John	1000001	Subscribed	2023-01-10 19:00 PM	Subscription purchase	1	2023-01-10 19:00 PM	Active	Initial setup	Issue resolved	John Doe	John Doe	View Details
	1000011	John	1000001	Unsubscribed	2023-01-11 20:00 PM	Not an existing feature	1	2023-01-11 20:00 PM	Active	Not an existing feature	Issue resolved	John Doe	John Doe	View Details
	1000012	John	1000001	Unsubscribed	2023-01-12 21:00 PM	Not an existing feature	1	2023-01-12 21:00 PM	Active	Not an existing feature	Issue resolved	John Doe	John Doe	View Details
Issue 5	1000013	John	1000001	Subscribed	2023-01-13 22:00 PM	Subscription purchase	1	2023-01-13 22:00 PM	Active	Initial setup	Issue resolved	John Doe	John Doe	View Details
	1000014	John	1000001	Unsubscribed	2023-01-14 23:00 PM	Not an existing feature	1	2023-01-14 23:00 PM	Active	Not an existing feature	Issue resolved	John Doe	John Doe	View Details
	1000015	John	1000001	Unsubscribed	2023-01-15 00:00 AM	Not an existing feature	1	2023-01-15 00:00 AM	Active	Not an existing feature	Issue resolved	John Doe	John Doe	View Details
Issue 6	1000016	John	1000001	Subscribed	2023-01-16 01:00 AM	Subscription purchase	1	2023-01-16 01:00 AM	Active	Initial setup	Issue resolved	John Doe	John Doe	View Details
	1000017	John	1000001	Unsubscribed	2023-01-17 02:00 AM	Not an existing feature	1	2023-01-17 02:00 AM	Active	Not an existing feature	Issue resolved	John Doe	John Doe	View Details
	1000018	John	1000001	Unsubscribed	2023-01-18 03:00 AM	Not an existing feature	1	2023-01-18 03:00 AM	Active	Not an existing feature	Issue resolved	John Doe	John Doe	View Details
Issue 7	1000019	John	1000001	Subscribed	2023-01-19 04:00 AM	Subscription purchase	1	2023-01-19 04:00 AM	Active	Initial setup	Issue resolved	John Doe	John Doe	View Details
	1000020	John	1000001	Unsubscribed	2023-01-20 05:00 AM	Not an existing feature	1	2023-01-20 05:00 AM	Active	Not an existing feature	Issue resolved	John Doe	John Doe	View Details
	1000021	John	1000001	Unsubscribed	2023-01-21 06:00 AM	Not an existing feature	1	2023-01-21 06:00 AM	Active	Not an existing feature	Issue resolved	John Doe	John Doe	View Details
Issue 8	1000022	John	1000001	Subscribed	2023-01-22 07:00 AM	Subscription purchase	1	2023-01-22 07:00 AM	Active	Initial setup	Issue resolved	John Doe	John Doe	View Details
	1000023	John	1000001	Unsubscribed	2023-01-23 08:00 AM	Not an existing feature	1	2023-01-23 08:00 AM	Active	Not an existing feature	Issue resolved	John Doe	John Doe	View Details
	1000024	John	1000001	Unsubscribed	2023-01-24 09:00 AM	Not an existing feature	1	2023-01-24 09:00 AM	Active	Not an existing feature	Issue resolved	John Doe	John Doe	View Details
Issue 9	1000025	John	1000001	Subscribed	2023-01-25 10:00 AM	Subscription purchase	1	2023-01-25 10:00 AM	Active	Initial setup	Issue resolved	John Doe	John Doe	View Details
	1000026	John	1000001	Unsubscribed	2023-01-26 11:00 AM	Not an existing feature	1	2023-01-26 11:00 AM	Active	Not an existing feature	Issue resolved	John Doe	John Doe	View Details
	1000027	John	1000001	Unsubscribed	2023-01-27 12:00 PM	Not an existing feature	1	2023-01-27 12:00 PM	Active	Not an existing feature	Issue resolved	John Doe	John Doe	View Details

Auto-Accept Review – How Does It Work?



1. Upon submission, filings are evaluated against the locally-configured Auto-Review condition(s)
2. If the envelope details do not meet the Auto-Review condition(s), the envelope is routed to the appropriate review queue to be reviewed by clerk (as it is today)
3. If the envelope details meets the Auto-Review condition(s), the filings are automatically accepted, stamped, funds captured, and notifications sent to filers/service recipients

Benefits of Auto-Accept



Improves Average Response Time

Automatically accepting common, low priority filings allow Clerks to focus on more complex, high priority filings, and respond to filers faster



Reduces Return for Correction Rates

Many Courts' effectiveness are measured by the percentage of accepted filings, auto acceptance improves these metrics



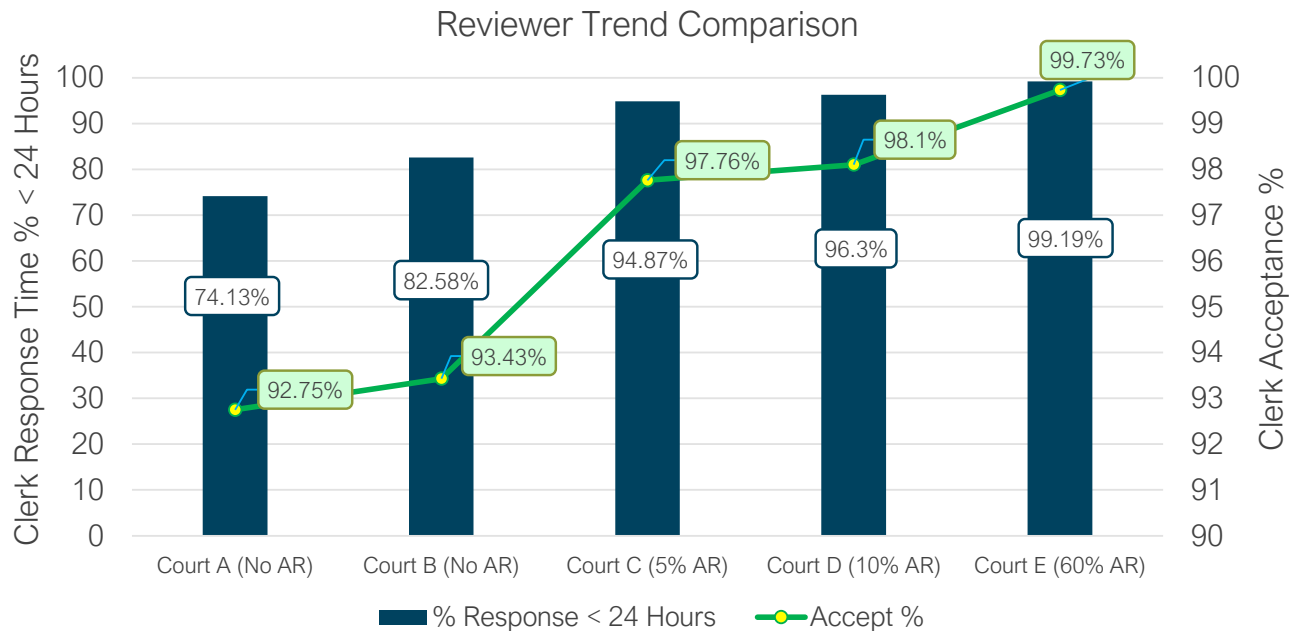
Reduces Operational Overhead

Auto acceptance removes the need for Clerk intervention, instantly increasing an office's reviewing capacity

The Effectiveness of Auto-Review

Summary

- Courts A and B use no auto-acceptance criteria
- Court E's Auto-Accept Review criteria automatically accepts ~60% of filings
- Courts C and D's marginal usage (5-10% of filings auto accepted) provides noticeable impact



*Example data utilizing Q4 2019 reviewer metrics

**AR = Auto Review

The AR % is based on number of reviewable filings submitted vs. number of filings auto reviewed

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Auto-Accept Review - How To Get Started?

Determine Business Needs

- ❖ Start with simple filing scenarios with high probability of acceptance
- ❖ Common scenarios:
 - Filings from Gov. Agencies or specialized Firms
 - Subsequent, no fee filings

Design Auto Accept Criteria

- ❖ Auto Review conditions commonly include a combination of:
 - Case Category
 - Case Type
 - Filing Code
 - Filing Firm
 - Optional Services
 - Document Type
 - Payment Type
- ❖ Auto Review feature is configurable by node/court location

Submit eSolutions Support Ticket

- ❖ Allow 2-3 business weeks for setup, testing, and promotion to production
- ❖ More complex conditions may take longer
- ❖ Consultation appointment can be scheduled via Support, or contact out to eSolutions CSAM

Press Review Tool

Solution that allows clerks to make e-Filed materials immediately available to the press and other authorized stakeholders

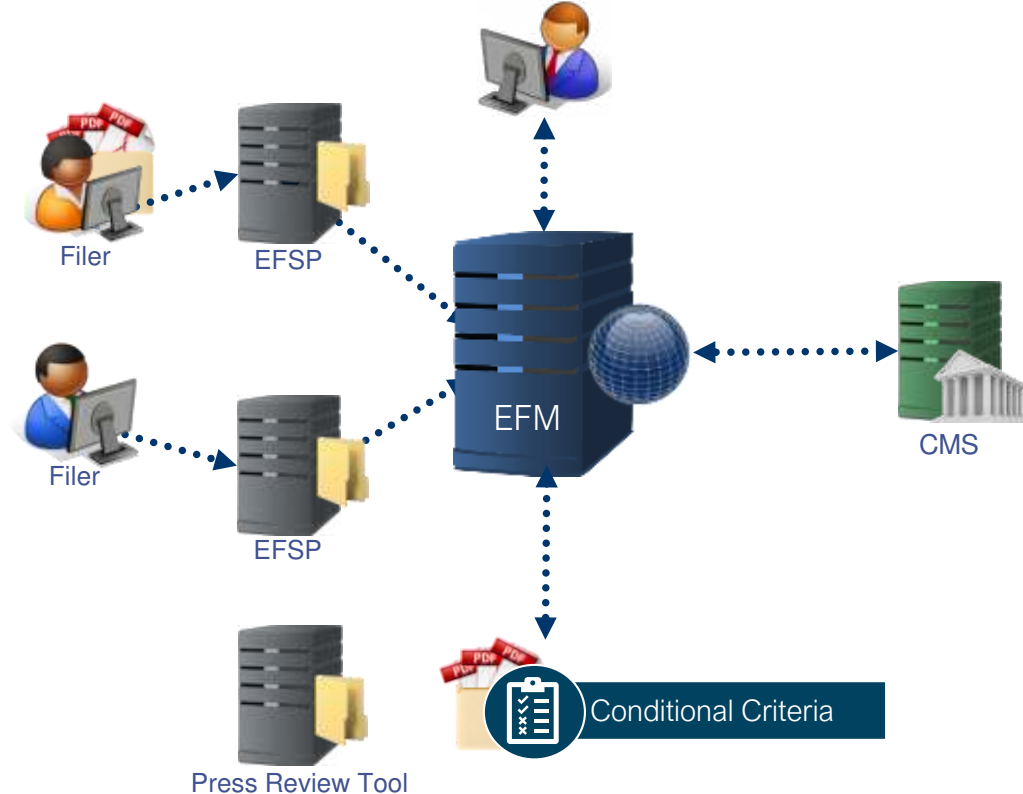
Records can be made available based upon:

- Case Type Codes
- Number of Days
- Filing States (Statuses)
- Security Groups
- Document Types

Requires eFiling contract amendment, updated terms and conditions and an annual fixed-fee

Show <input type="text" value="10"/> entries		Location: <input type="text" value="Sydney"/> <input type="button" value="Go"/>	
Location	Invoice Date	Case Number	File
Chlorine Gas at Canadian CGO	2022-06-14	New Case - ID: 3012155	View Case Details/History/Log
Chlorine Gas at Canadian CGO	2022-06-15	New Case - ID: 3012158	View Case Details/History/Log
Deposition #1	2022-06-14	A-20-00015-1	View Case Log
Deposition #1	2022-07-01	A-20-00015-2	View Case Log
Deposition #1	2022-07-01	A-20-00015-3	View Case Log
Deposition #1	2022-06-14	A-20-00015-4	View Case Log
Deposition #1	2022-07-01	A-20-00015-5	View Case Log
Deposition #1	2022-07-01	A-20-00015-6	View Case Log
Deposition #1	2022-07-01	A-20-00015-7	View Case Log
Deposition #1	2022-07-01	A-20-00015-8	View Case Log
Deposition #1	2022-07-01	A-20-00015-9	View Case Log
Deposition #1	2022-06-14	A-20-00015-10	View Case Log
Deposition #1	2022-06-14	A-20-00015-11	View Case Log

Press Review Tool – How Does It Work?



1. Upon submission, filings are evaluated against the Press Review condition(s)
2. If the envelope details meet the Press Review conditions, the envelope data and document are surfaced in the Press Review Tool while they await Clerk review
3. Once the Clerk takes action on the envelope, the envelope data and document are removed from Press Review Tool and are processed accordingly

Note: If the envelope details do not meet the Press Review conditions, the envelope data and documents are never surfaced within the Press Review Tool

Press Review Tool – Configuration Options

Configuration Option	Description
Case Type Codes	This a list of case type codes that should be included in the Press Review tool
Days	This is the number of days documents should be included. Documents that are older than this date will be omitted from the Press Review tool
Filing States	This is a list of filing states that are to be included. Any filing not in one of these states will be omitted from the Press Review tool. (ex. Submitted, Under Review, Accepted, Rejected, etc.)
Security Groups to Omit	This is a list of case security group codes that are to be omitted. Any filing linked to a case with one of these security groups will be omitted from the Press Review tool.
Document Types to Omit	This is a list of document type codes that are to be omitted from the Press Review tool.

Press Review Tool – How to Get Started?

Purchase Press Review Tool

- ❖ Press Review Tool requires an amendment to the eFile & Serve contract
- ❖ Cost for the Press Review Tool is \$108k/year for a statewide implementation
- ❖ Costs include implementation services, infrastructure and support

Determine Configuration and Access

- ❖ Review and determine your configuration preferences for the Press Review Tool
- ❖ Create generic credentials (Username/Password) to provide authorized users access to the Press Review Tool
- ❖ Provide additional usernames (email address) that have authorization to access Press Review Tool

Submit eSolutions Support Ticket

- ❖ Submit your configurations and usernames (email addresses) for the users you would like to provide access to
- ❖ Allow 2 - 6 weeks for setup, testing, and promotion to production
- ❖ Consultation appointment can be scheduled via Support, or contact your eSolutions CSAM

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