MINNESOTA
OFFICE OF ADMINISTRATIVE HEARINGS

Workers' Compensation

eFiling

USER GUIDE

CONTENTS

I. Introduction

Any party to a Workers' Compensation case at the Office of Administrative Hearings (OAH) can eFile. Using OAH's new eFiling system is voluntary at this time.

When you register, you'll get all of the benefits of the new system – including these:

a. Faster filing and service with associated savings of time and cost;

b. Electronic, immediate service **to and from other registered users**;

c. Immediate up-to-date access to all documents in any of your cases from any computer or mobile device;

d. Intuitive, easy-to-use system; and

e. Saves trees!

Once you have a registered eFiling account, you will automatically receive eService from other parties on your cases who are registered eFilers. If you do not register for eFiling, however, other registered parties will not be able to serve you electronically through the new system. Your decision not to register will force all other parties to serve you in paper, unless you have authorized other forms of service as allowed by Minn. R. 1415.0700, subp. 2 (2016). Whether you register for eFiling or not, most filers will not continue to receive paper service from OAH. Whether you sign up for eFiling or not, **beginning on March 26, 2018, OAH started electronically serving all attorneys, insurers, self-insured employers, third party administrators and rehabilitation providers,** as now allowed by Minn. Stat. § 176.285, subd. 2 (2016).

Under current law, beginning June 1, 2018, the following documents are the only ones that must be filed with DLI and not OAH:

- Requests for .106 administrative conferences (and related documents including motions to intervene in pending conferences at DLI), regardless of the amount in dispute, unless primary liability is disputed;
- Claim Petitions that only identify medical or rehabilitation disputes, unless primary liability is disputed;
- Requests for med/rehab dispute certification under Minn. Stat. § 176.081, subd. 1(c) (and related documents); and
- Objections to penalties assessed by DLI;
- Any other documents that OAH does not take action on (NOPLDS, NOBPs, FROIs, Rehab Plans/amendments, other required compliance forms, etc.).

Any documents not listed above should be filed directly with OAH, not DLI. Dual filing is NO LONGER REQUIRED.

We've worked hard to design the eFiling system to be easy to understand and simple to use. We hope you'll give it a try, and that you'll find that it meets your clients' needs for faster, cheaper and more reliable processing of contested Workers' Compensation claims.

II. Registration and Setup

A. Pre-Registration Account Confirmation

Prior to go-live, OAH set up eFiling accounts for all known Workers' Compensation attorneys and their legal assistants. Attorneys' accounts have already been linked to all open, pending Workers' Compensation disputes.

- Pre-registered attorneys should complete the following instructions in order to opt in to eService and eFiling. If attorneys don't want to opt in, they do not need to do anything.

  How do you know if you are a pre-registered attorney? You got an email from Chief Judge Pust on March 25 or 26 informing you of your username and temporary password. If you didn't get an email, you can register as described beginning on page 7 of this guide.

- Pre-registered legal assistants should complete the following instructions if they want to use their own separate eFiling account. Legal assistants who plan to use their attorneys' eFiling accounts to access the system do not need to do anything (other than make sure that their attorney(s) complete the steps below to confirm their account(s).)

  How do you know if you are a pre-registered legal assistant? You got an email from Chief Judge Pust on March 25 or 26 informing you of your username and temporary password. If you didn't get an email, you can register as described beginning on page 7 of this guide.

i. Log In to eFiling and Confirm Your Email Address

1. Click on the Workers' Compensation eFiling link on OAH's website: http://mn.gov/oah
2. Enter the **Username** and **Password** provided in the email from Chief Judge Pust.
3. Click **Login**.

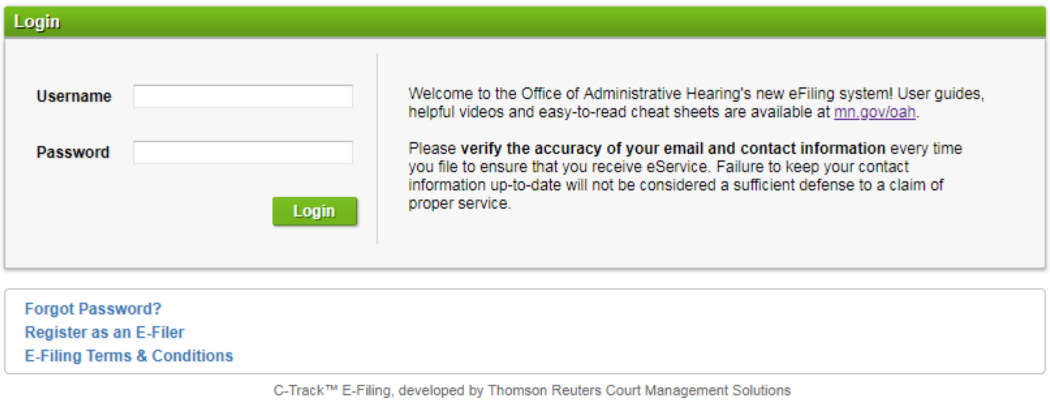


Image: Login screen

4. Click the down arrow next to your name in the upper-right corner of the screen.

5. Click **My Account.**

Image: My Account link

6. Click **Resend Approval E-mail**. Note that the email will be sent to the address listed in the **Primary E-Mail** box.

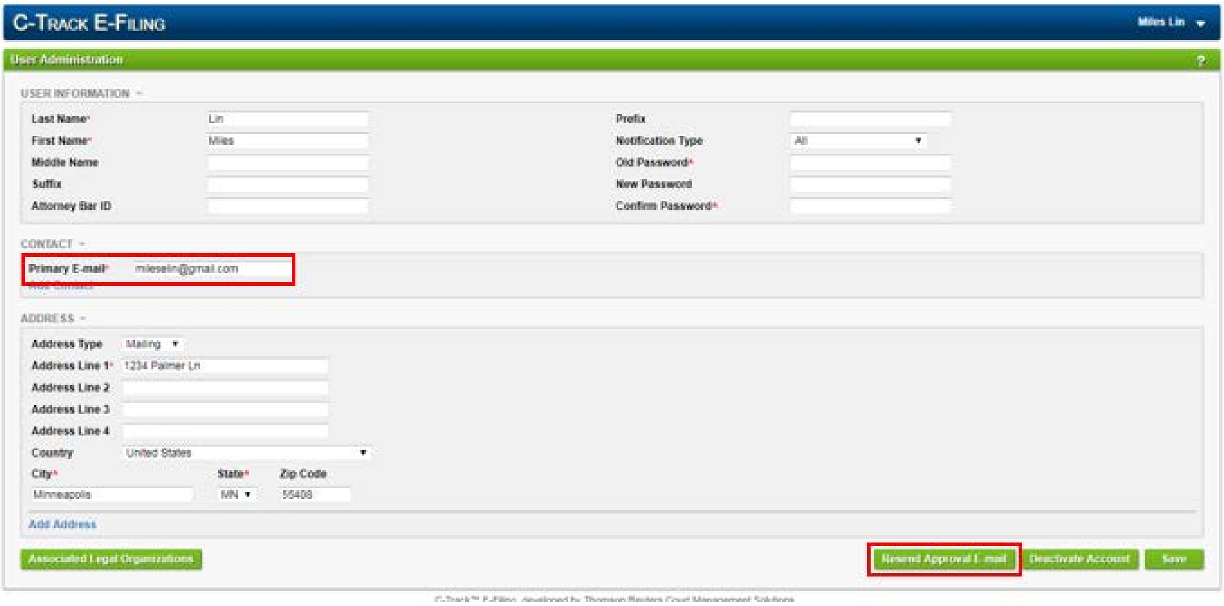
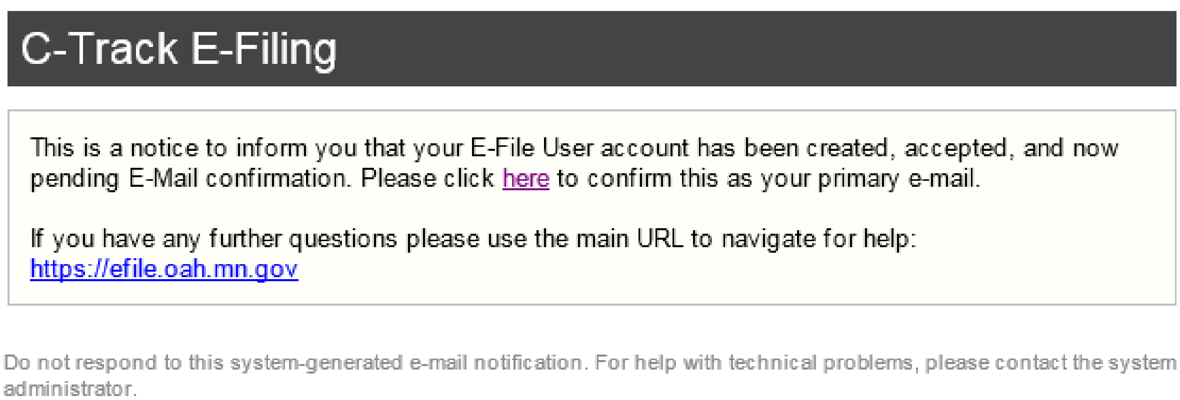


Image: User Administration screen

7. Log into your email account (the one listed in the **Primary E-Mail** box of the **User Administration** screen).

8. Open the eFiling account confirmation email from OAH. If you do not receive the account confirmation email, check your spam box. The email will appear similar to the image below.


C-Track E-Filing

This is a notice to inform you that your E-File User account has been created, accepted, and now pending E-Mail confirmation. Please click here to confirm this as your primary e-mail.

If you have any further questions please use the main URL to navigate for help: https://efile.oah.mn.gov

Do not respond to this system-generated e-mail notification. For help with technical problems, please contact the system administrator.

Image: Example email confirmation

9. **Click the link** provided in the email.

What happens next? A browser window opens and navigates to the **eFiling Login** screen. The green **Success** notification is displayed.

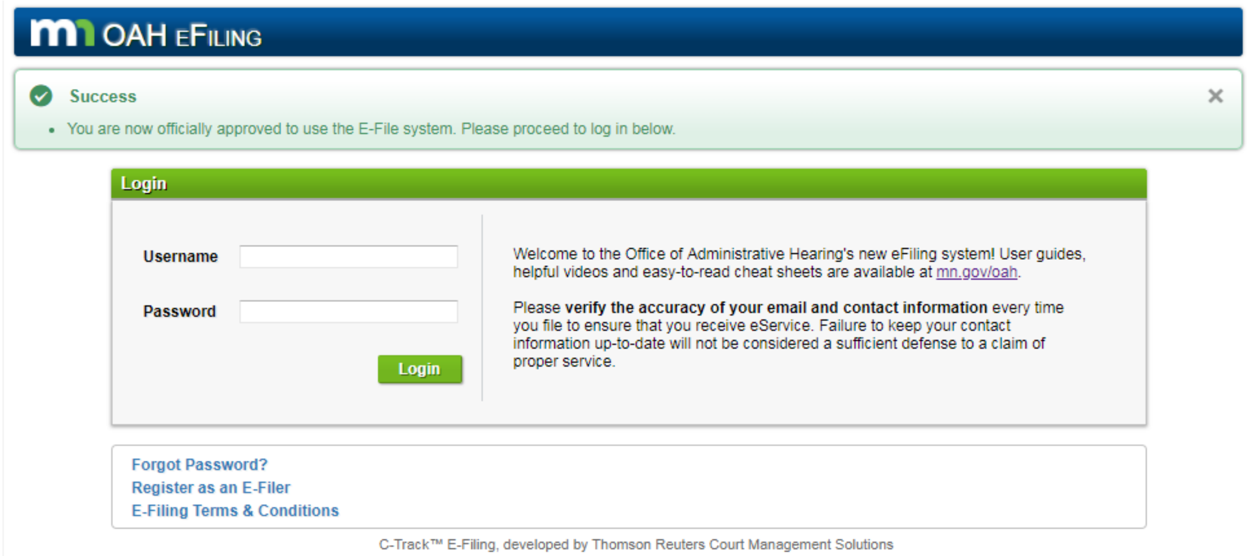


Image: eFiling Login screen

ii. Log In and Switch to Legal Organization Account

1. Enter your **Username**.
2. Enter your **Password**.
3. Click **Login**.

What happens next? The **eFiling Home** screen appears. Your first and last name display in the top right corner of the page.

Image: eFiling Home screen

4. You are registered as part of a legal organization (law firm, etc.), so you should switch to your legal organization view to view your cases or submit a filing.
5. Click the down arrow next to your name.
6. Click **Switch Association.**

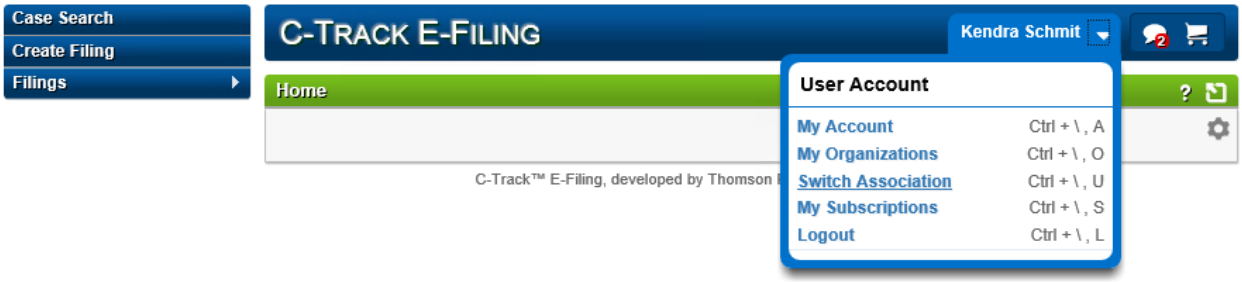


Image: Switch Association link

7. Select your legal organization from the **Legal Organization** dropdown menu.

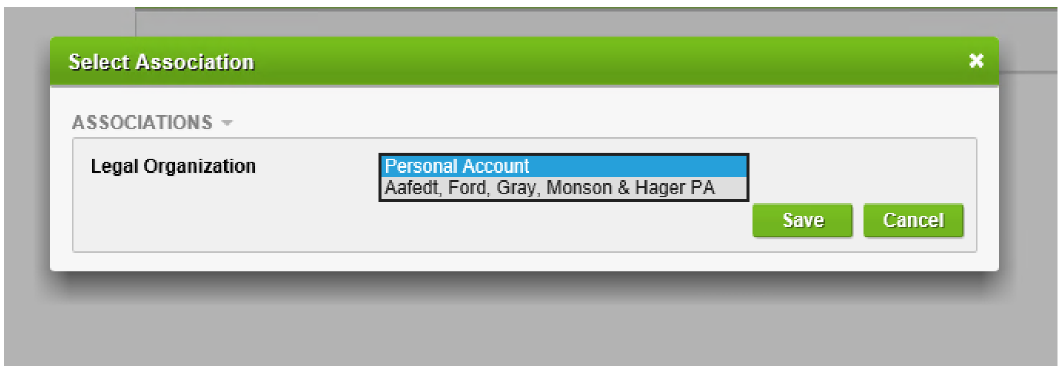


Image: Legal Organization Association dropdown menu

8. Click **Save**.

iii. Change Your Password

1. Click the down arrow next to your name in the upper-right corner of the screen.

2. Click **My Account.**

Image: My Account link

3. Type the temporary password provided by OAH in the **Old Password** box.

4. Enter your chosen password in both the **New Password** and **Confirm Password** boxes.

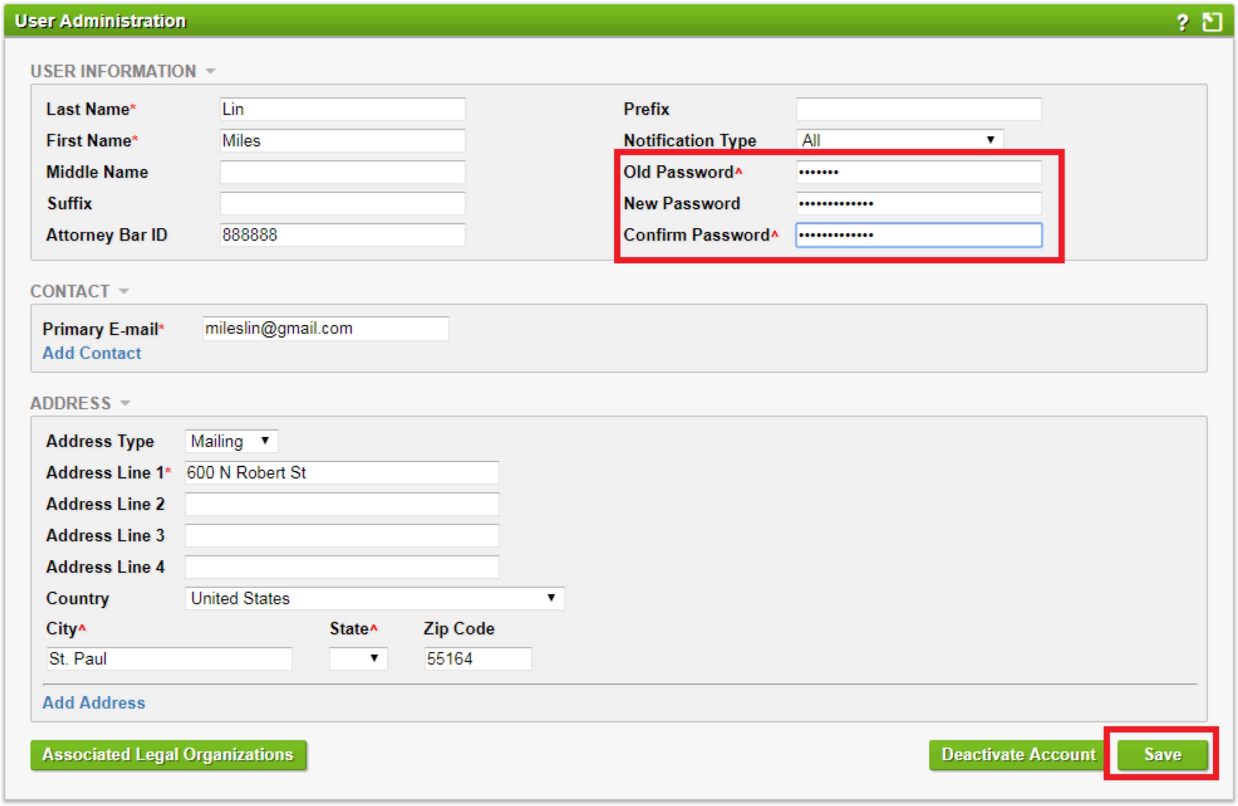


Image: User Administration screen – Change Password

5. Click **Save**.

B. Register as an eFiler

Individuals who are not pre-registered should follow these instructions to create an account.

1. Click the **Workers' Compensation eFiling** link on OAH's website: http://mn.gov/oah.

2. Review the eFiling Terms and Conditions.

3. Click **Register as an eFiler**.

OAH eFiling

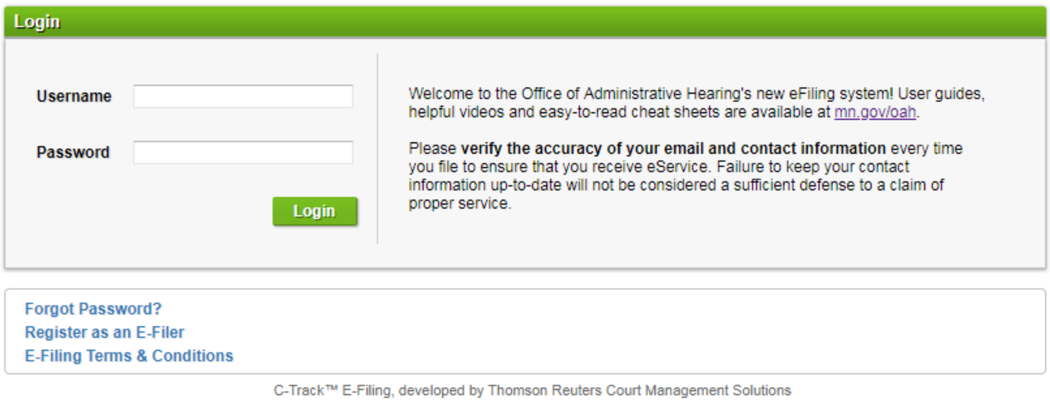


Image: eFile Registration / Log In screen

What happens next? The **eFile Registration** screen appears.

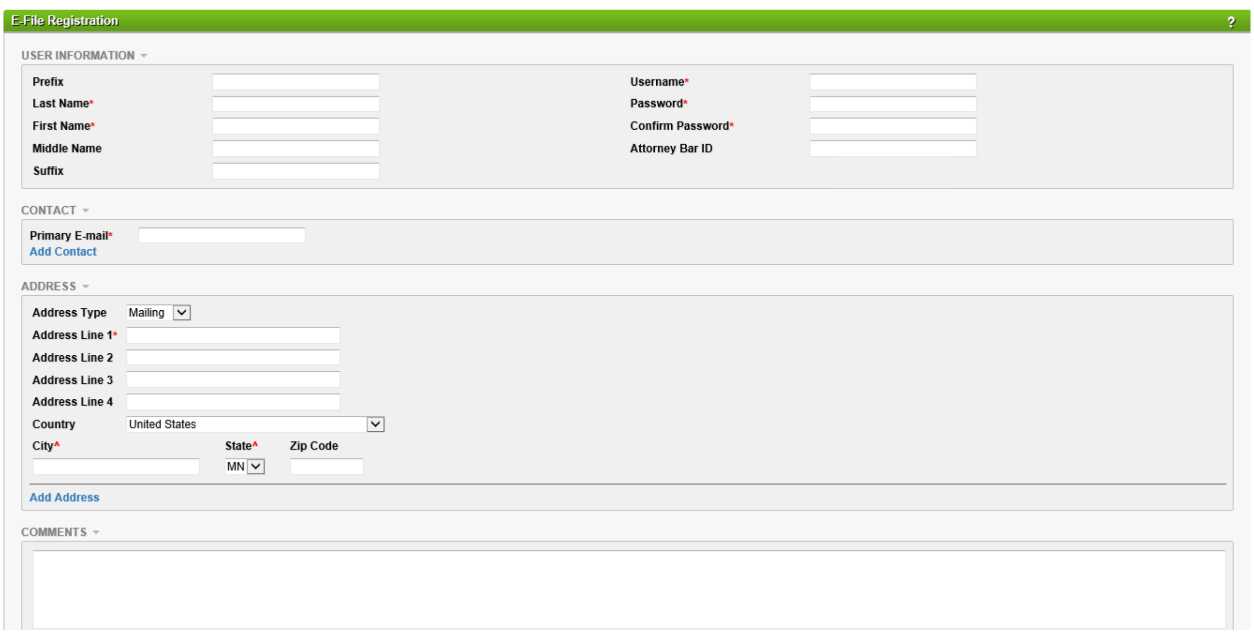


Image: eFile Registration screen

In the **User Information** section:

4. Enter a **Username**. Your username must be unique. If your username is already taken, the system will prompt you to choose another.

5. Enter your **Last Name**.

6. Enter your **First Name**.

7. Enter a **Password**.

8. **Confirm Password**.

In the **Contact** section:

9. Enter a **Primary email**. This is the email at which you will receive eService notifications and system notifications.

10. Click **Add Contact** to enter additional email addresses as needed.

In the **Address** section:

11. Enter your mailing address using **Address Line 1** through **Address Line 4**.

12. Enter your **City**.

13. Select your **State**.

14. Enter your **Zip Code**.

i. Associate with a Law Firm or Other Organization

If you are part of a Legal Organization, such as a registered law firm or government agency, you should associate your eFiling account with your organization so that you can share cases with your colleagues and support staff.

1. Click **Add Legal Organization**.

What happens next? The **Legal Organization Search** window appears.

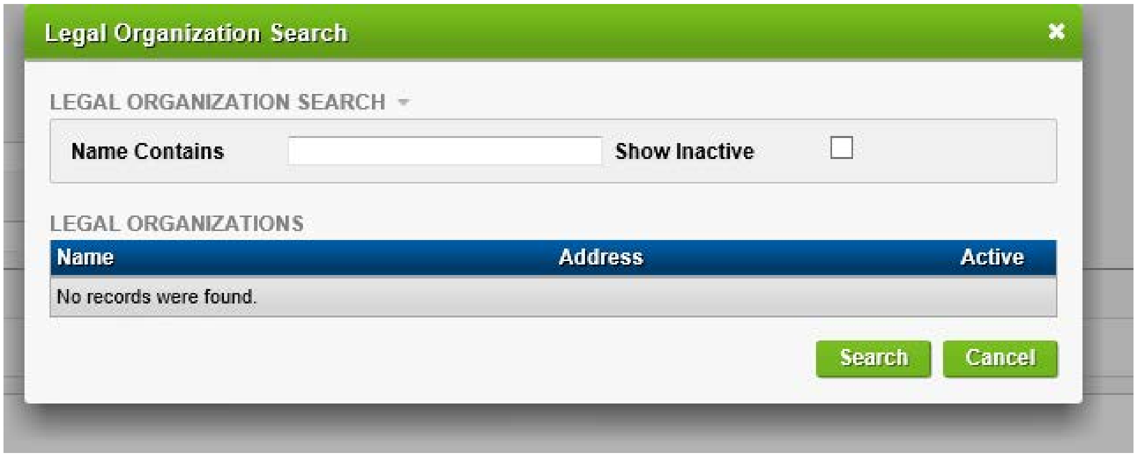


Image: Legal Organization Search window

2. Enter the name, or part of the name, of your legal organization.

3. Click **Search**.

What happens next? The **Legal Organization Search** results appear.

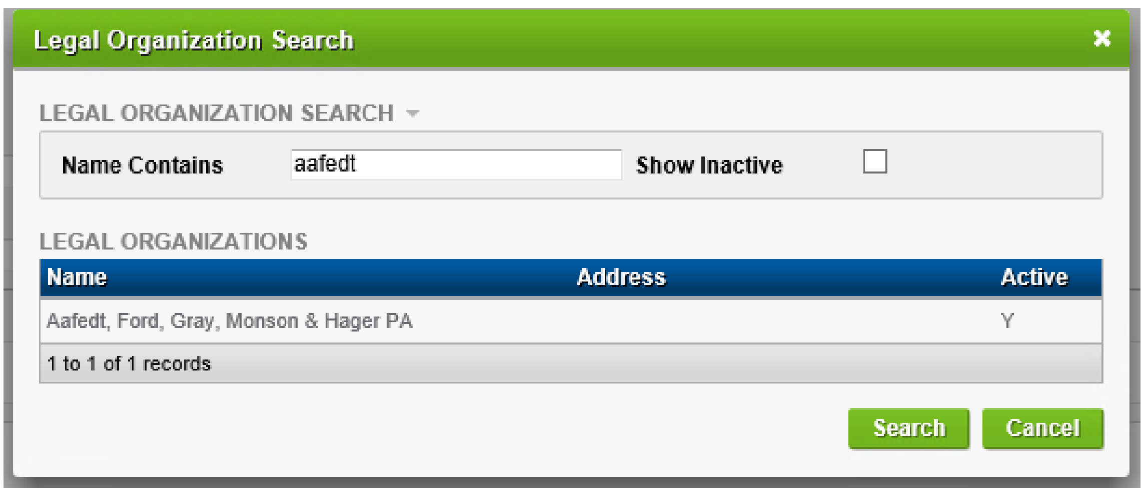


Image: Legal Organization Search results

> ➢ **NOTE:** If your Legal Organization is not returned in a search, OAH must add your Legal Organization to its database. Please email OAH.WCeFiling@state.mn.us to request that OAH add your legal organization. Then you will be able to add the Legal Organization through the **User Administration** screen after your account is set up. Please see section II, part E of this User Guide for more information about the **User Administration** screen.

4. Click the name of the Legal Organization to which you are associating your eFiling account.

What happens next? The **User-Legal Organization Details** window appears.

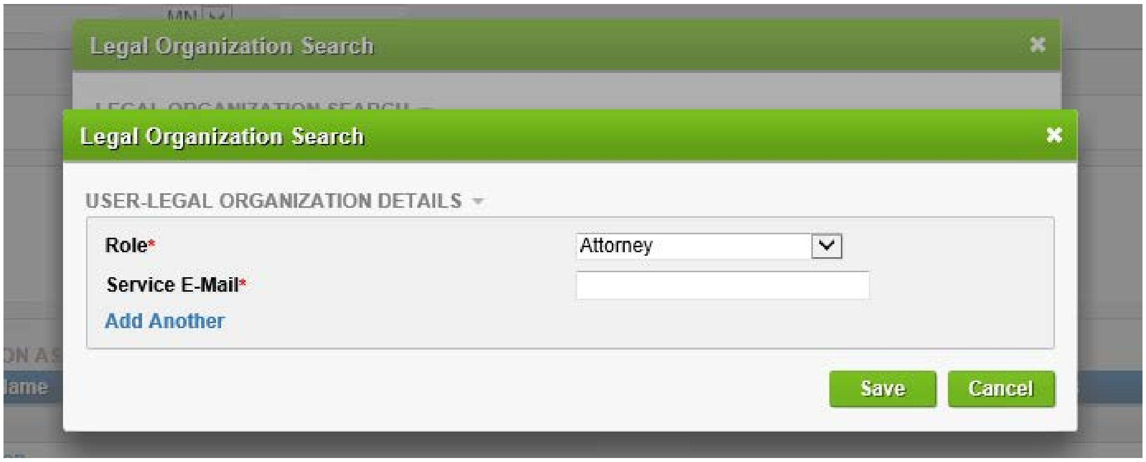


Image: User-Legal Organization Details Window

5. Select a **Role: Attorney**, **Law Firm Administrator**, **or Legal Assistant**.

6. Enter a **Service Email**.

7. Click **Add Another** to enter additional email addresses to receive eService notifications (such as your support staff), as needed.

> ➢ **NOTE:** Additional service emails **will not** automatically receive copies of OAH Notices and Orders. **Adding additional email addresses in the eFiling system does not also update your contact information in OAH's files.** Please notify OAH which email addresses should receive copies of OAH Notices and Orders via email to OAH.WCeFiling@state.mn.us.

8. Click **Save**.

9. Click the **I agree** check box in the Terms and Conditions section.

10. Click **Next**.

> ➢ **NOTE:** OAH must approve your association to your Legal Organization. Once your registration is complete, please email OAH.WCeFiling@state.mn.us to request that OAH add you to your legal organization.

What happens next? The **User Pending Approval** screen appears.

Image: User Pending Approval screen

ii. Confirm and Finalize

1. Log into the email account that you entered as your Primary Email on the Registration form.

2. Open the eFiling account confirmation email from OAH. If you do not receive the account confirmation email immediately, wait a few minutes and check your spam folder.

3. Click the link provided in the email. The email will appear similar to the figure below.

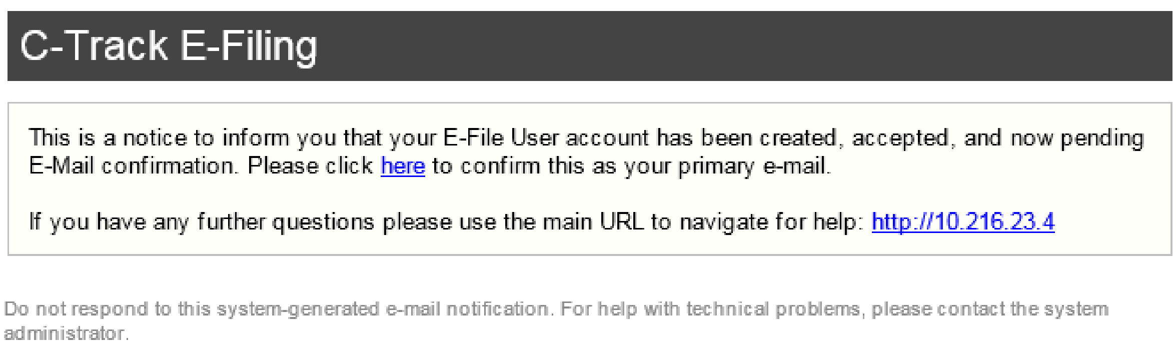


Image: eFiling Email Confirmation example

What happens next? A browser window opens and navigates to the **eFiling Login** screen.

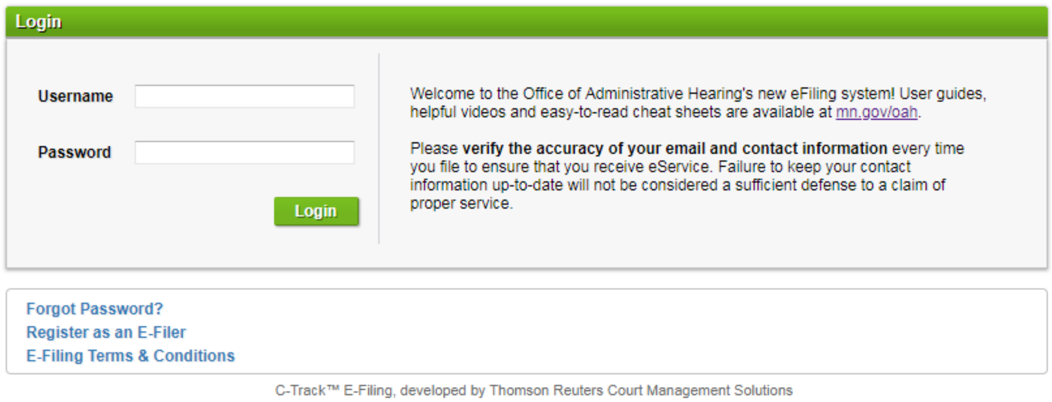


Image: eFiling Login screen

C. Log In and Switch to Legal Organization Account

1. Enter **Username**.
2. Enter **Password**.
3. Click **Login**.

What happens next? The **eFiling Home** screen appears and your registered first and last name display in the top right header of the Home screen banner.

Image: eFiling Home screen

4. If you registered as part of a legal organization, such as a law firm, you should always switch to the legal organization view before filing. Click the down arrow next to your name.
5. Click **Switch Association.**

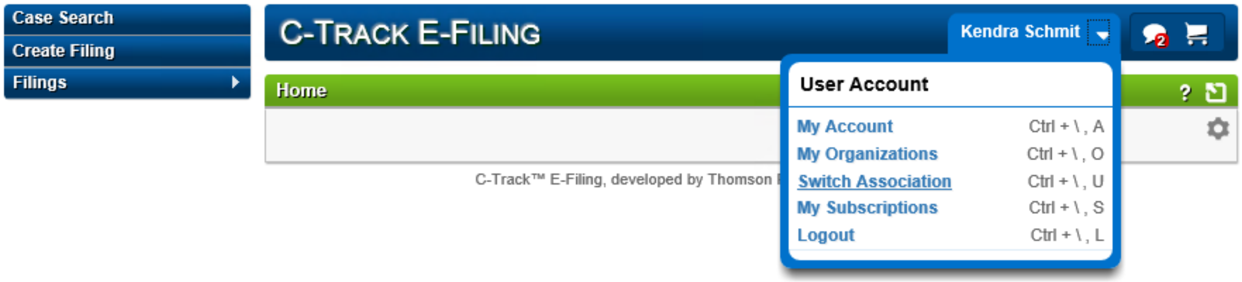


Image: Switch Association link

6. Select your legal organization from the **Legal Organization** dropdown menu.

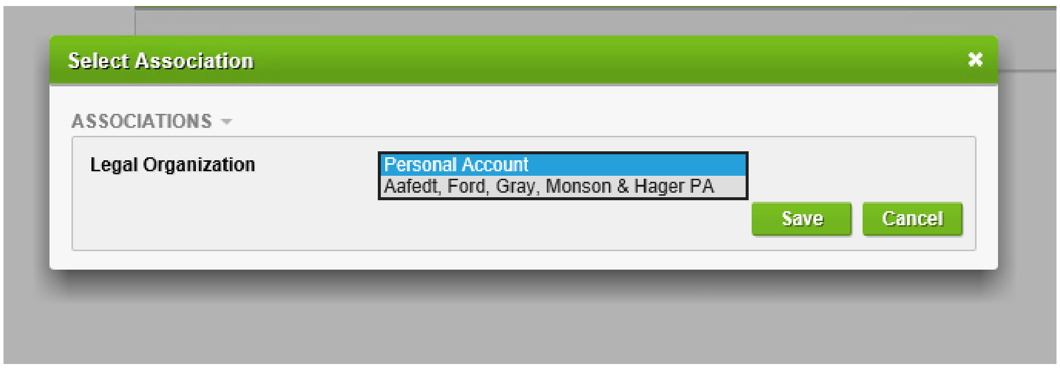


Image: Legal Organization Association dropdown menu

7. Click **Save**.

> ➢ **NOTE:** If you use Google Chrome as your browser and cookies are enabled, the eFiling system will remember that you switched to your legal organization view and you will not need to switch every time you log in.

D. User Administration Screen

User Administration lets you update your contact information and change your eFiling password.

> ➢ **NOTE**: Please remember that updating your contact information in the eFiling system does not update your contact information in OAH's Files. So whenever you update your contact information in eFiling, please remember to send an email to OAH (OAH.WCeFiling@state.mn.us) with that same update so we can change our files. Thanks!

1. To access the User Administration screen, click the down arrow icon  to the right of your username in the top right corner from any screen in eFiling.

What happens next? The **User Account** menu appears.

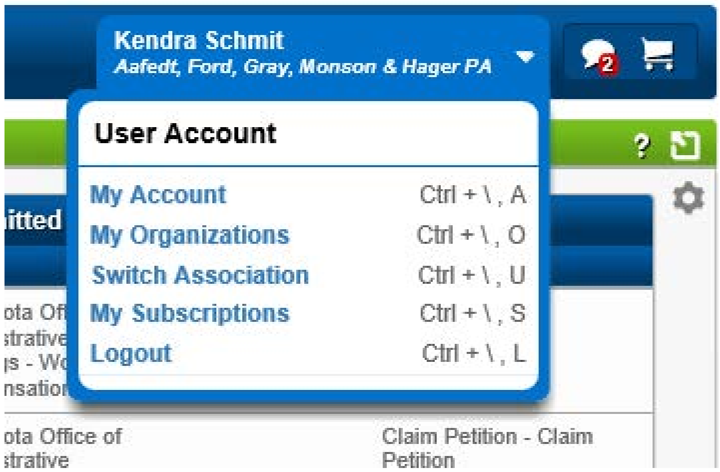


Image: User Account menu

2. Click **My Account** link.

What happens next? The **User Administration** screen appears.

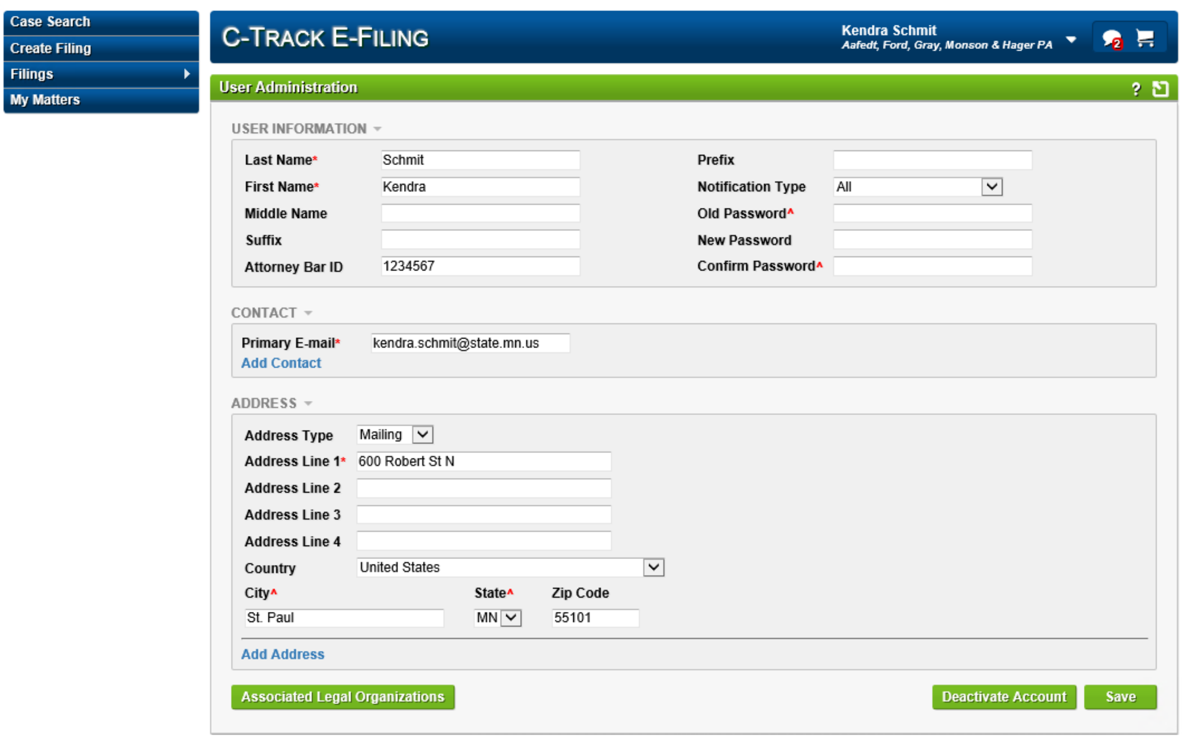


Image: User Administration screen

The **User Administration** screen has six sections. You can update your **User Information**, change your **Password**, add and edit **Email** and **Address** contact information.

i. Associate with a Law Firm or Other Organization

If you did not add your legal organization at registration, you can add it in the User Administration screen.

1. Click **Add Legal Organization**.

What happens next? The **Legal Organization Search** window appears.

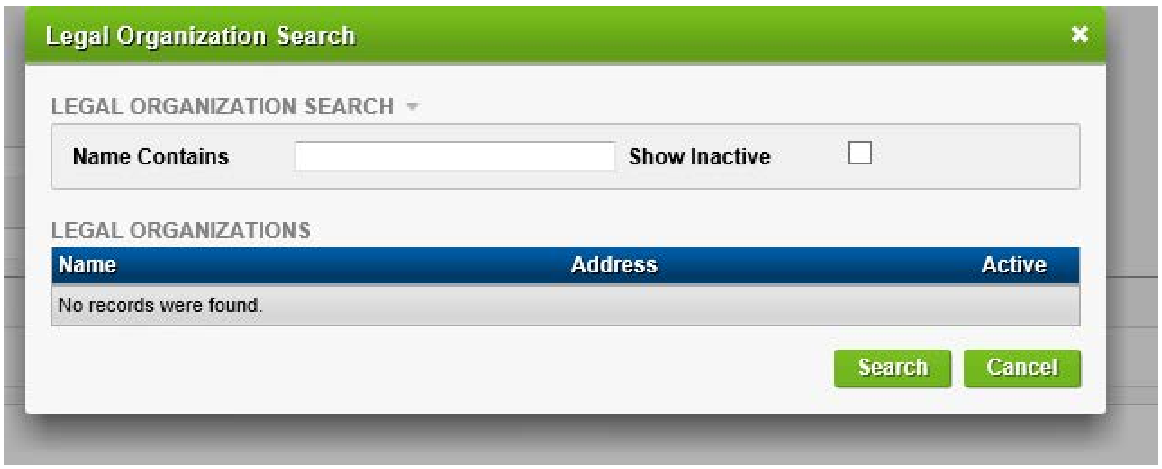


Image: Legal Organization Search window

2. Enter the name, or part of the name, of your legal organization.
3. Click **Search**.

What happens next? The **Legal Organization Search** results appear.

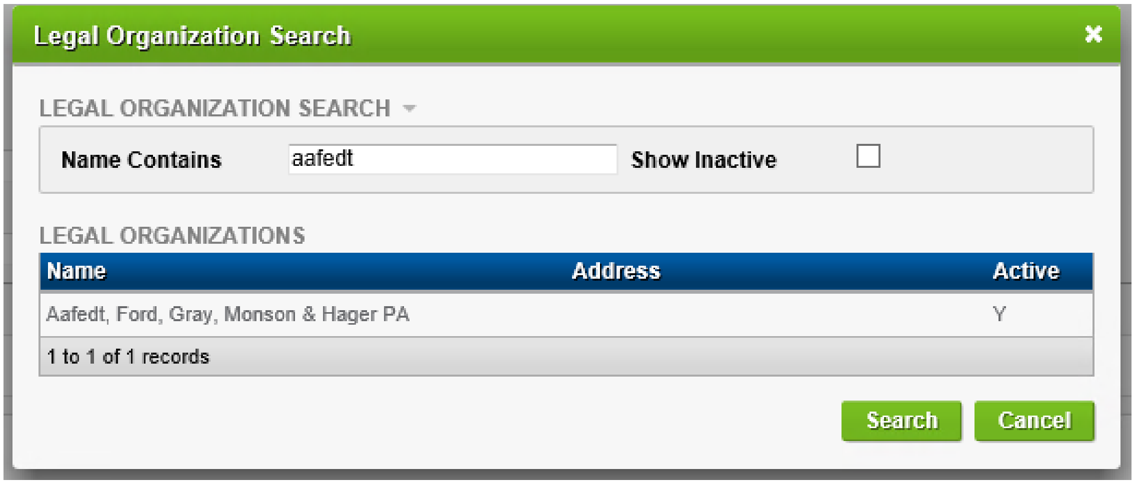


Image: Legal Organization Search results

4. Click the name of the Legal Organization to which you are associating your eFiling account.

What happens next? The **User-Legal Organization Details** window appears.

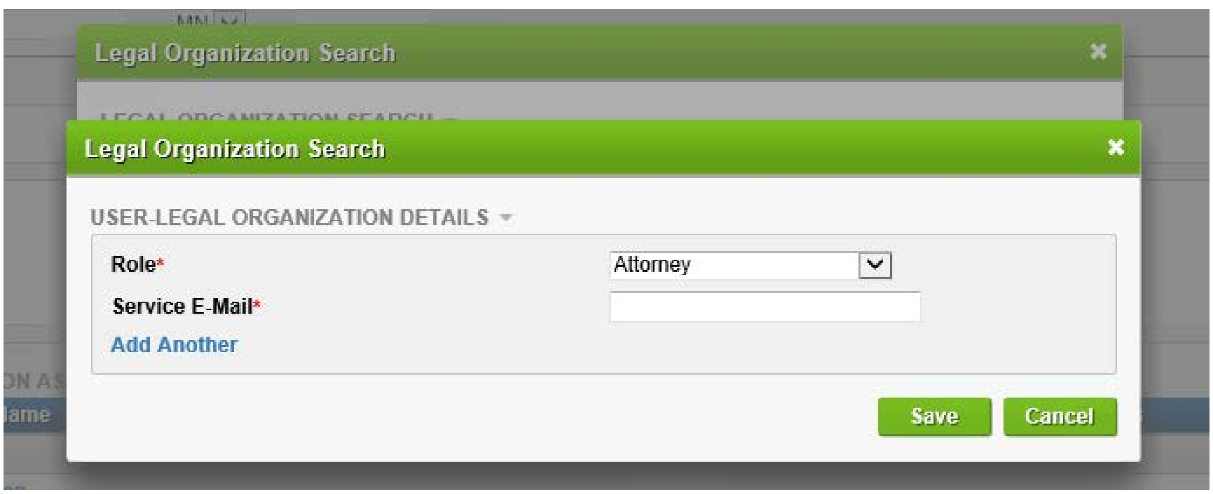


Image: User-Legal Organization Details window

5. Select a **Role: Attorney**, **Law Firm Administrator**, **or Legal Assistant**.

6. Enter a **Service Email**.

7. Click **Add Another** to enter additional email addresses to receive eService notifications (such as your support staff), as needed.

> **NOTE:** Additional service emails **will not** automatically receive copies of OAH Notices and Orders. **Adding additional email addresses in the eFiling system does not also update your contact information in OAH's files.** Please notify OAH which email addresses should receive copies of OAH Notices and Orders via email to OAH.WCeFiling@state.mn.us.

8. Click **Save**.

9. Upon adding your legal organization, you should immediately **Switch Association** as described in section II, part C of this guide.

E. Set Up Your Personalized Home Screen

The eFiling logo in the top banner of every screen is a link to your **Home** screen.

Image: Home screen – Home link

eFiling offers a variety of information for preview on your home screen through **widgets**. You control which widgets appear in your personal **Home** screen. No widgets display until you choose which widgets you want to display. To choose widgets:

1. From the **eFiling Home** screen, click the grey gear icon at the far right of the screen.

What happens next? The **Edit Dashboard** window appears.

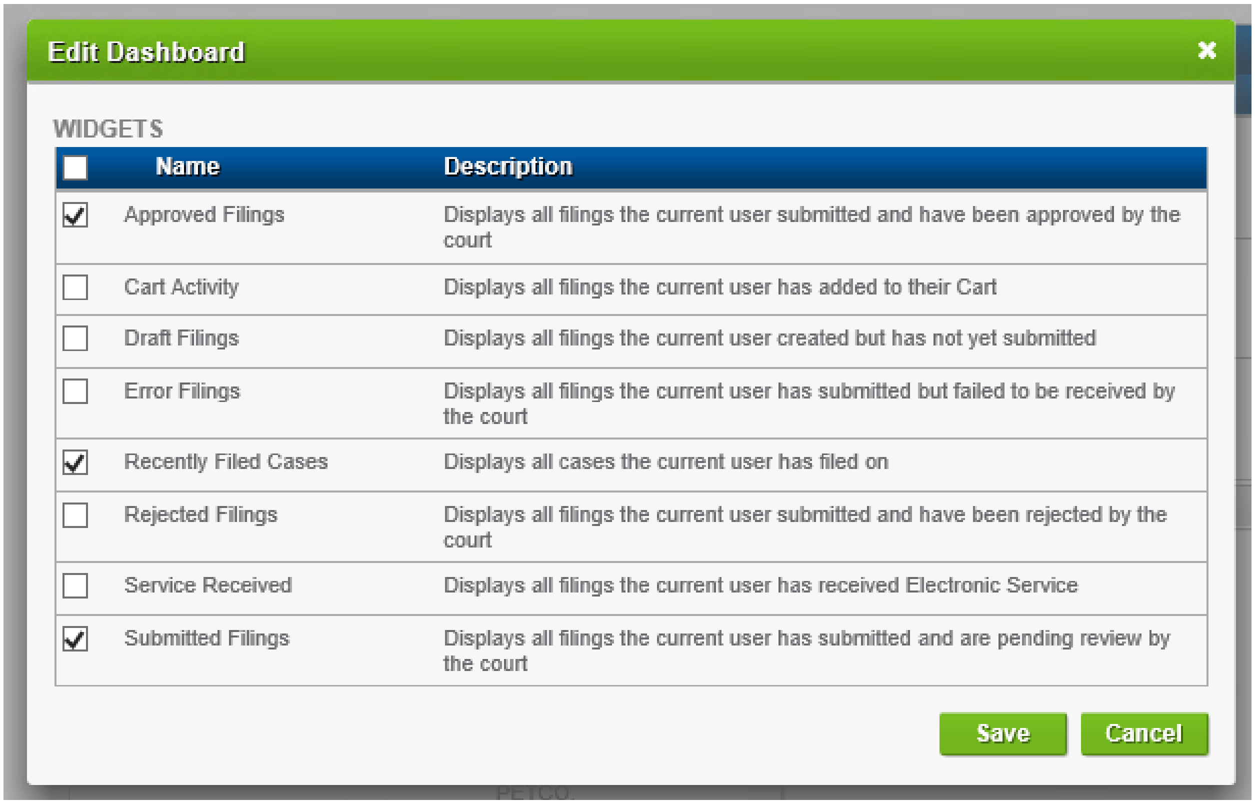


Image: Edit Dashboard window

2. Click the **checkboxes** for the **widgets** you wish to see. To select all of the widgets, click the check box in the header of the **Widgets** box.

3. Click **Save**.

What happens next? The selected widgets are added to your **Home** screen.

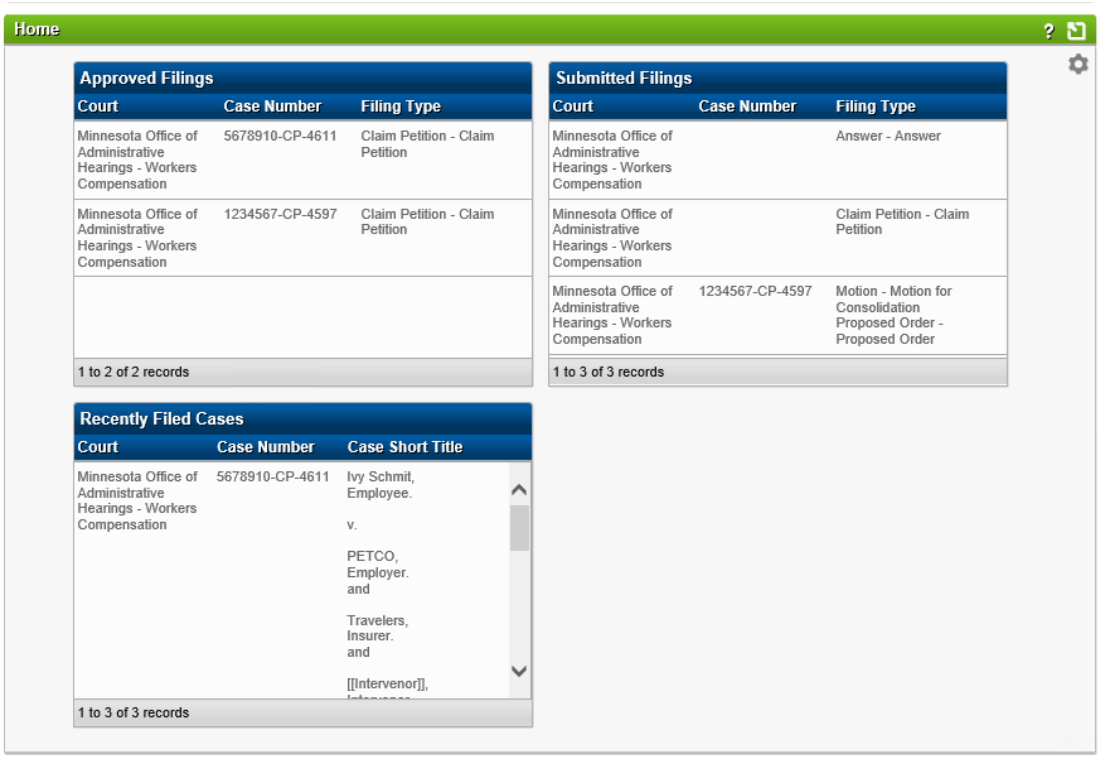


Image: Home screen – Widgets added

4. To rearrange your widgets, click and drag the header of any widget to a new location on the screen.

5. To remove widgets from your home screen, again click the **Configure** icon.

6. Uncheck the boxes for widgets that you want to remove from the **Home** screen.

7. Click **Save**.

What happens next? The selected widgets are removed from your **Home** screen.

F. Notifications

OAH Notices and Orders are always sent via email regardless of the notification preference chosen in the eFiling system. System notifications only relate to your own filing submissions and electronic service from other parties. You receive notifications from the eFiling system when:

- You receive electronic service from other parties;
- You submit a filing;

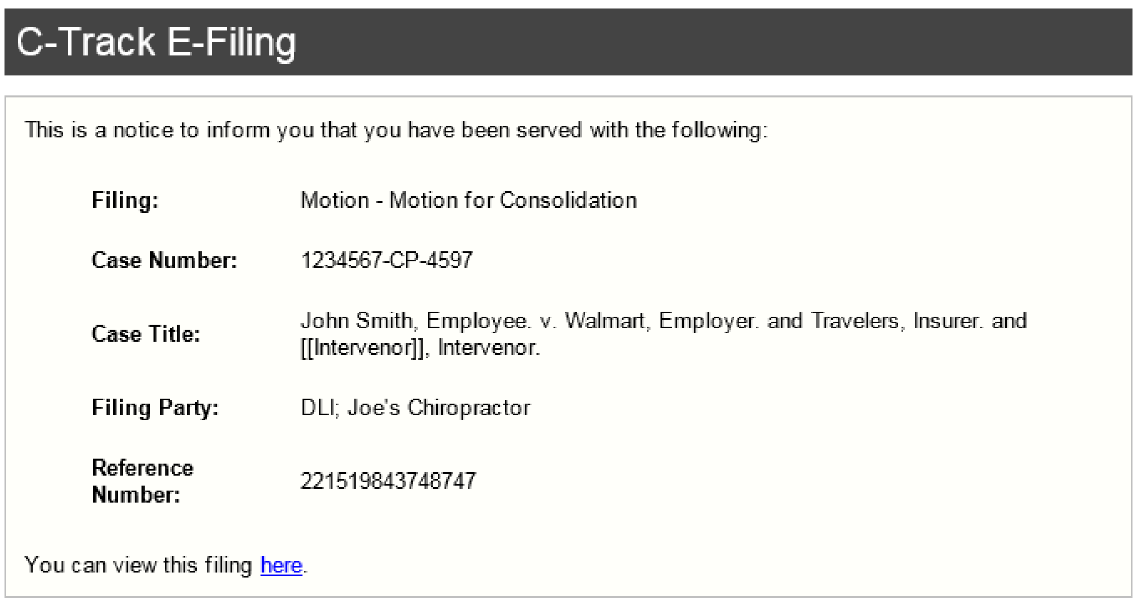
- OAH accepts your filing.

You can choose between three ways to receive notifications:

- Via email sent to the email address(es) listed in your registration;
- In the eFiling application only (**<u>not recommended unless you will log in at least once per day to check for new notifications</u>**);
- Both via email and in the eFiling application (selected by default upon registration).

i. Email Notifications

If you choose to receive notifications via email, you will receive an email from OAH with a direct link to the filed document. When other parties serve you electronically, you must log in to the eFiling system to view the document.


C-Track E-Filing

This is a notice to inform you that you have been served with the following:

Filing:	Motion - Motion for Consolidation
Case Number:	1234567-CP-4597
Case Title:	John Smith, Employee. v. Walmart, Employer. and Travelers, Insurer. and [[Intervenor]], Intervenor.
Filing Party:	DLI; Joe's Chiropractor
Reference Number:	221519843748747

You can view this filing here.

Image: Example email notification

ii. eFiling Application Notifications

If you choose to receive eFiling application notifications only, you will **not** receive an email notice from OAH. You will only be notified of new filings via the Notifications icon in the eFiling system. **<u>For this reason, OAH does not recommend selecting this option unless the user will log in at least once per day to check for new notifications.</u>** To view notifications in eFiling:

1. Click the **Notification** icon.

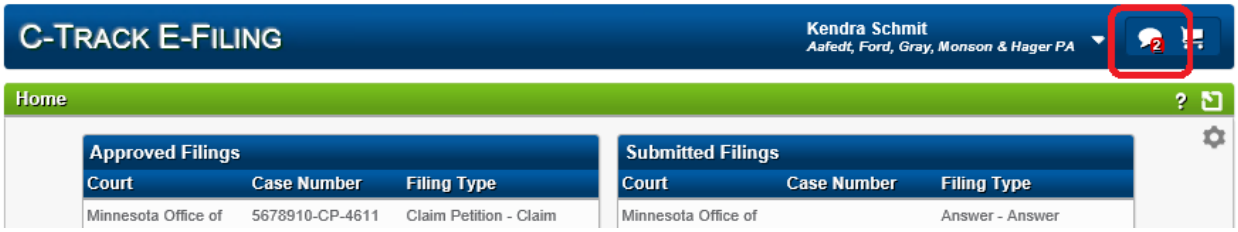


Image: Home screen - Notifications

What happens next? The **Notifications** quick view window is exposed.

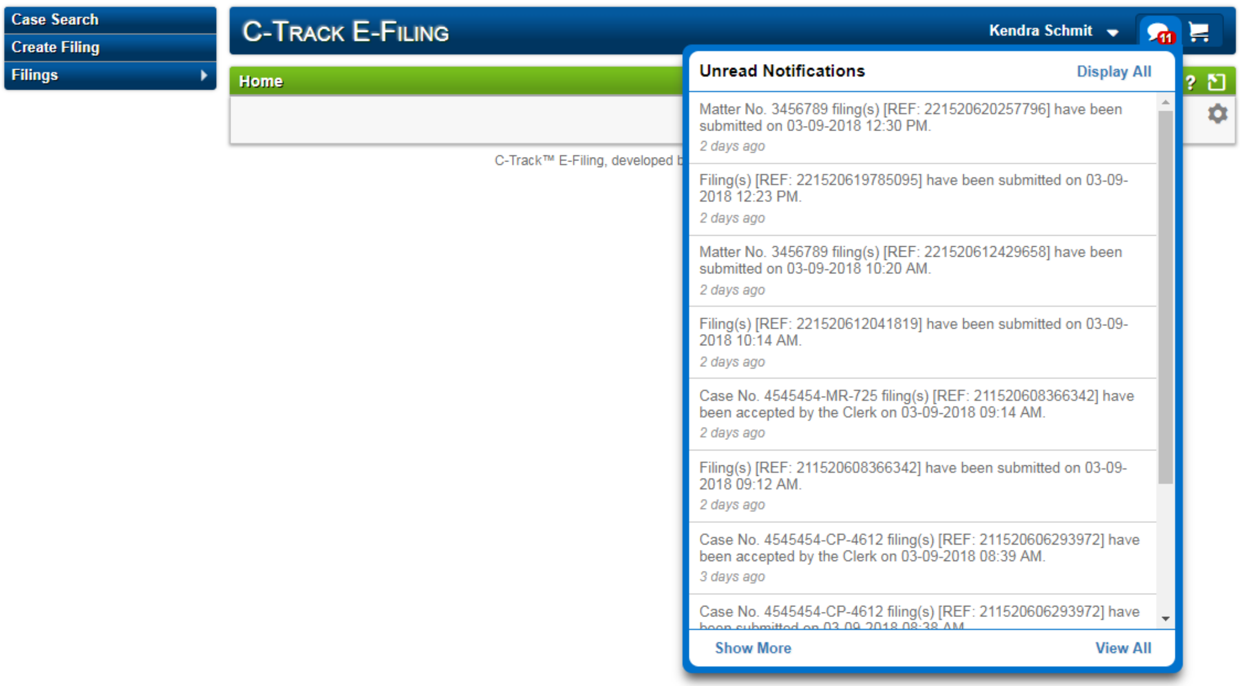


Image: Home screen - Notifications quick view window

2. Click on any notification in the list to view it in detail. Click **View All** to view all your notifications on a new page.

What happens next? The **Notifications** screen appears.

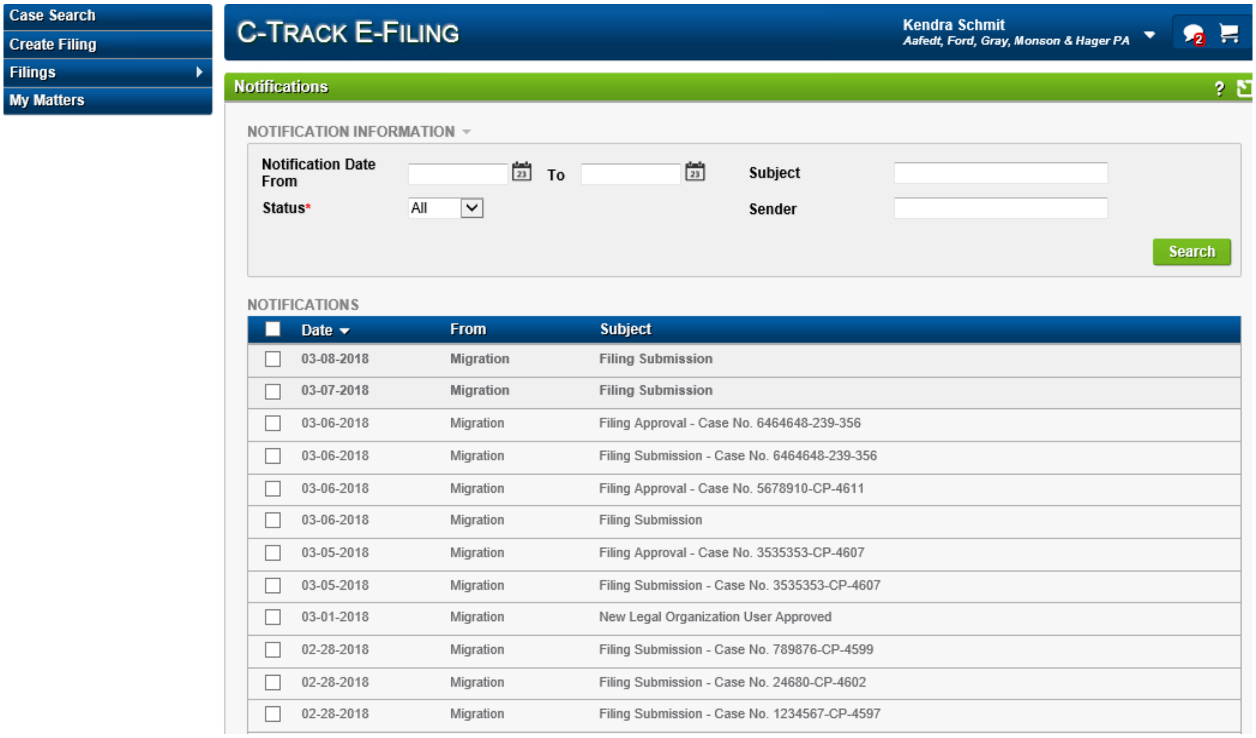


Image: Notifications screen

By default, the screen displays all notifications with a status of **Unread**. You can search notifications by **Date**, **Subject**, **Status** and **From**.

3. Click any header in the **Notifications** table to sort the information in ascending / descending order:

   - **Date** column –the date the system sent the notification to you
   - **From** column –the name of the sender
   - **Subject** column – a description of the notification; includes a case number if one exists for the filing

4. Click any notification to view more details. Click on the details to open the relevant **Filing Summary**.

   - Use the **Checkbox Column** to select specific notifications to mark as read or unread. Use the checkbox in the table header to select all notifications to mark as read or unread
   - **Mark Read** button – marks the selected notifications as **Read** and reduces the **Notification** icon number displayed at the top of all eFiling screens.

- **Mark Unread** button – marks the selected notifications as **Unread** and increases the **Notification** icon number displayed at the top of all eFiling screens

iii. Select Notification Preference

1. Click your **name** in the upper-right corner of the eFiling application.

2. Click **My Account**.

3. Make your selection from the **Notification Type** dropdown menu.

4. **<u>If you opt to receive notifications in the eFiling application only, you should log in at least once per day to check for new notifications.</u>** OAH recommends selecting both email and eFiling notifications to ensure that no service is missed.

5. Click **save**.

G. Reset Password

1. Should you forget your password, click the **Forgot Password?** link on the **eFiling Login** screen.

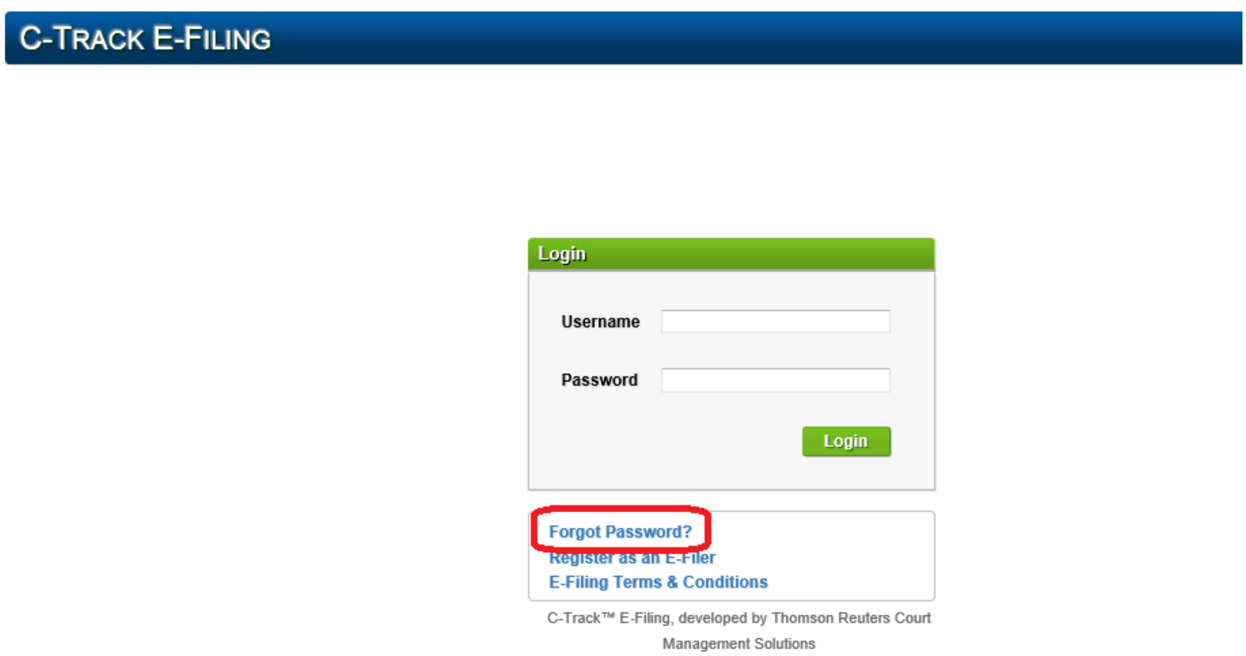


Image: Login screen – Forgot Password Link

What happens next? The **Forgot Password** Information message and **Password Reset Request** page appear.

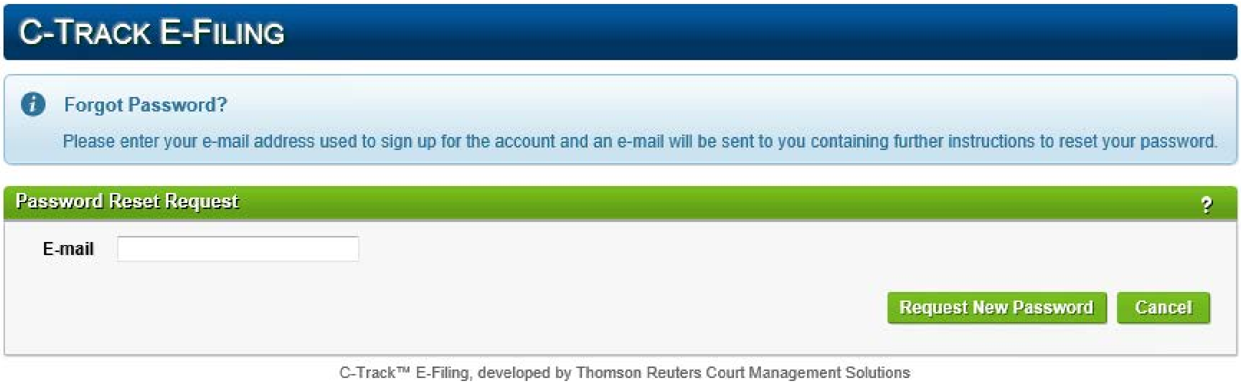


Image: Password Reset Request page

2. Enter the email address you provided on the Registration form.

3. Click **Request New Password**.

4. An email is sent to the email account on file. Follow the instructions in the email to reset your password.

III. Update Contact Information and Service Email Address

Contact information can be updated in the eFiling system. Each user controls the email address(es) that receive electronic service.

A. Notify OAH (for Notices and Orders)

If your contact information changes at any time, you must notify OAH of the change **in addition** to taking the steps shown below. **Updating your information in the eFiling system does not also update your contact information in OAH's files – so please remember to tell us directly via email to OAH.WCeFiling@state.mn.us. Thanks!**

B. Update Name or Mailing Address

1. Notify OAH of the changed information as described above.

2. Click your name in the upper-right corner of the eFiling application.

3. Click **My Account**.

4. Update information as necessary.

5. Click **Save.**

C. Change or Add a Service Email Address (for eService from other parties)

i. Notify OAH

Adding additional email addresses in the eFiling system does not also update your email addresses in OAH's files. Please notify OAH which email addresses should receive copies of OAH Notices and Orders, via email to OAH.WCeFiling@state.mn.us.

ii. My Account

1. Click your name in the upper-right corner of the eFiling application.

2. Click **My Account**. The **User Administration** screen appears.

3. To change your email address, edit the information in the **Primary Email** box.

4. To add an additional service email, click **Add Contact**. Select **email** from the dropdown menu that appears, and type the additional email address.

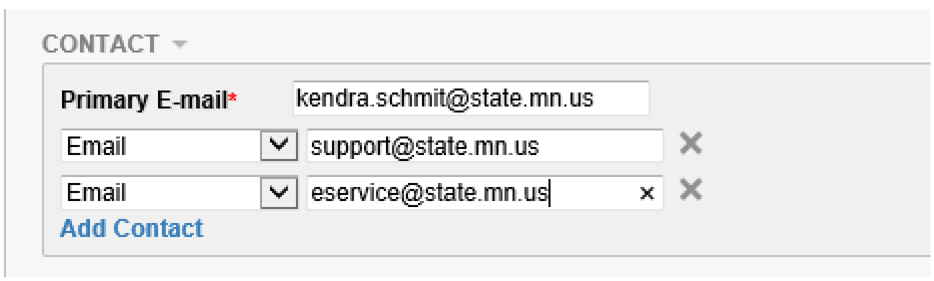


Image: Additional Email Address in My Account screen

5. Click **Save.**

iii. Legal Organization Account

If you are part of a legal organization (such as a law firm or government agency), your service email address must also be updated on the legal organization level.

1. From the **My Account/User Administration** screen, click **Associated Legal Organizations.**

2. Click on your email address in the "Legal Organization Association" section of the page.

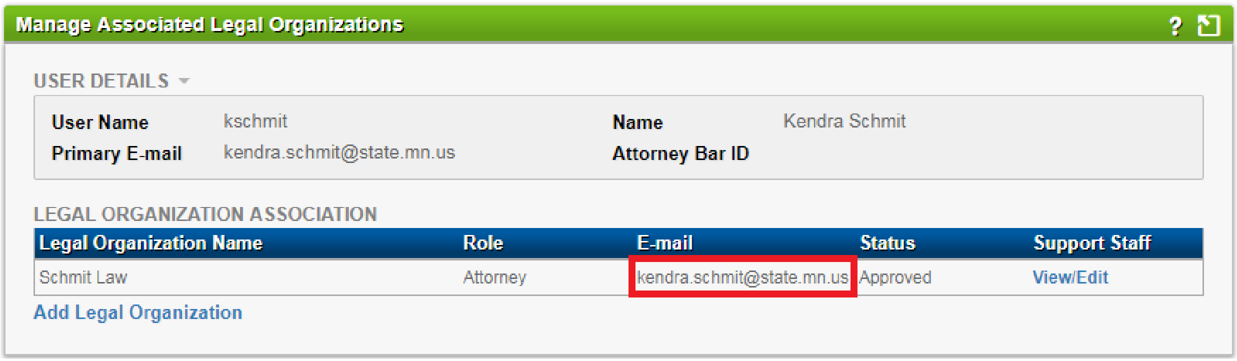


Image: Manage Associated Legal Organizations screen

What happens next? The **User-Legal Organization Details** screen appears.

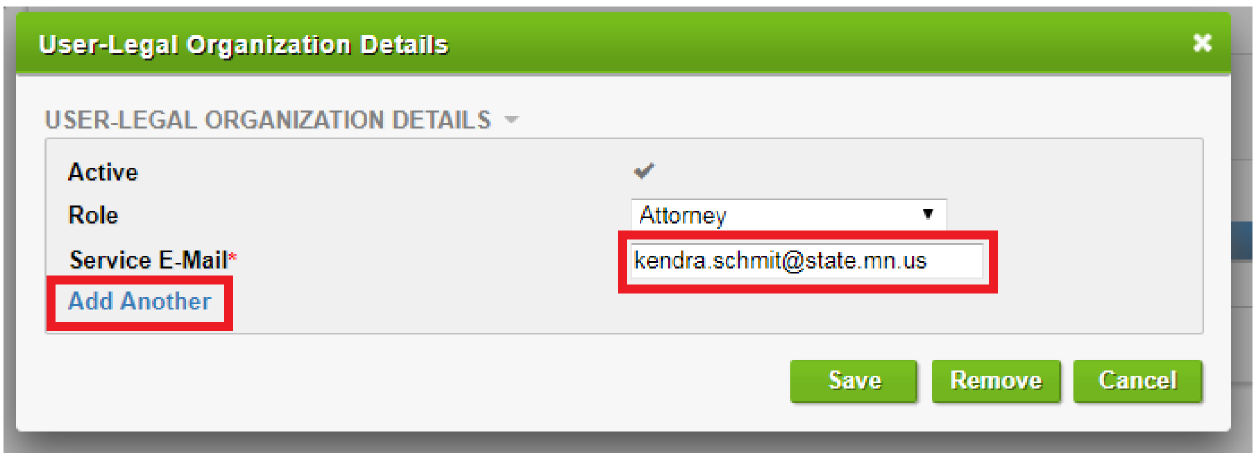


Image: User-Legal Organization Details Screen

3. To change your service email address, edit the email address in the **Service Email** box.

4. To add an additional email to receive service, click **Add Another**. Type the additional email address into the box that appears. To remove the additional email, click the grey X.

5. Click **Save**.

IV. Case Numbers and Case Search

A. Case Numbers = WID + Dispute Codes + Random#

The design of the new system requires that OAH assign a case number to all filings. Building upon the WID, OAH has tried to make the case number identifier as intuitive as possible. **Each case number is made up of three components**:

Example: **Case No. 12345678-CP-98765**

WID = 12345678 + **Dispute Type Code** (CP = Claim Petition) + **Random Number**

The system will generate the random number. You will need to know the employee's WID and the dispute type to which your filing relates in order to eFile a new case. Below is a list of the dispute types and their associated dispute type codes:

Dispute Type	Dispute Type Code
239 Request	239
Asbestos	ASB
Claim Petition	CP
Mediation	MDT
Medical/Rehabilitation request	MR
Objection to Penalty Assessment	OPA
Other	OTH
Petition for Contribution or Reimbursement	PCR
Petition for Temporary Order	TO
Wage Benefits Discontinuance	DISC

➢ **NOTE**: Because the new system has to assign a case number to each filed matter**, every dispute type involving the same employee, employer and date(s) of injury is a different case with a different case number**. For example, a 239 dispute and a Claim Petition involving the same parties and date(s) of injury will constitute two cases: 1234567-239-98765 and 1234567-CP-43210. **You will know they are related because they share the same WID.** You can find both cases by searching with the WID.

B. Case View

After you have been identified as a party or attorney to a specific case, you can see:

- A list of parties and attorneys

- A list of docket entries and related documents filed at OAH
- Any Notices or Orders issued by OAH
- The name of the block assigned judge
- The date, time and location of the next scheduled proceeding before a Workers' Compensation Judge
- The case number, case title, and case type

All existing disputes that were open and pending at OAH as of March 26, 2018 are available to view in the eFiling system. If a dispute was closed prior to March 26, 2018, it is not available to view in eFiling.
If no party has identified you as a party to the case, you will not have access to view the case or find the case number in eFiling. In this circumstance, you should contact the other parties to obtain the case number.

C. Prepare to Search

Before searching for a case, always ensure that the following steps have been completed:

1. Log into the attorney's or authorized support staff's eFiling account (see page 61 of the user guide for instructions on authorizing support staff)

2. If the attorney's firm name is not displayed below their name, complete these steps to switch to the law firm view:

    a. Click **Switch Association.**

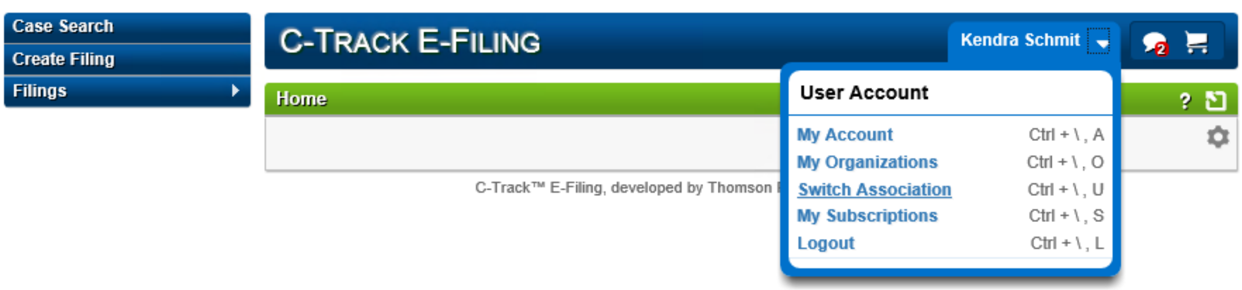


Image: Switch Association link

    b. Select the legal organization from the **Legal Organization** dropdown menu.

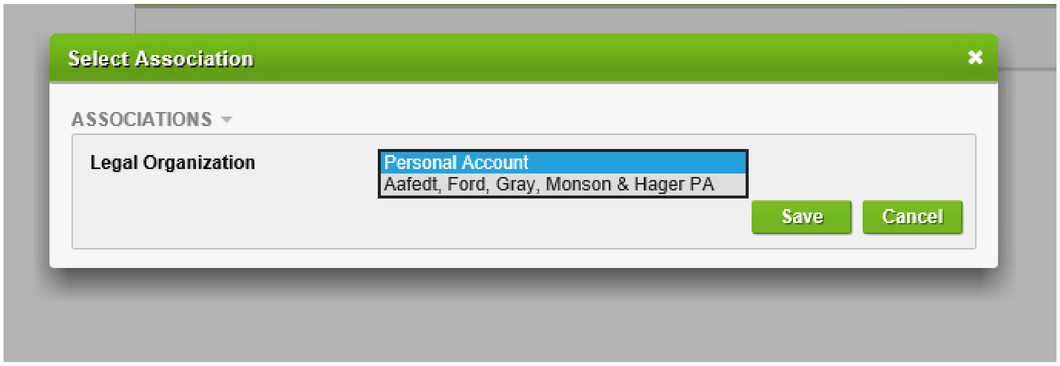


Image: Legal Organization Association dropdown menu

c. Click **Save**.

3. Click **Case Search** in the left navigation.

D. Get a Complete List of Your Cases

1. On the **Case Search** screen, select **Minnesota Office of Administrative Hearings – Workers' Compensation** from the **Court** dropdown.

2. Leave the rest of the page blank.

3. Click **Search**.

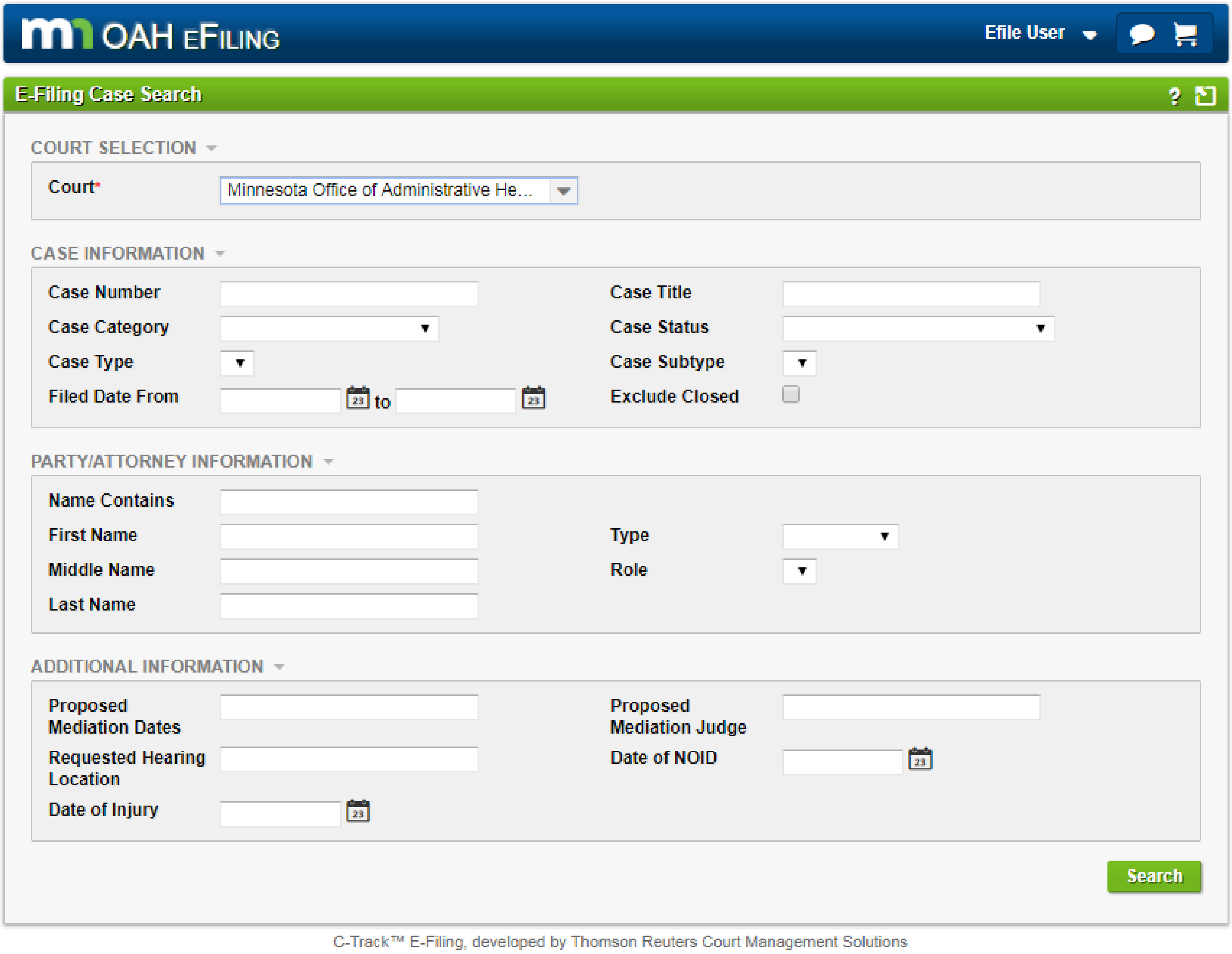


Image: Search for a list of all your own cases

E. Search for a specific case with the WID number:

1. Enter the **WID** in the Case Number field.
2. Click **Search**.

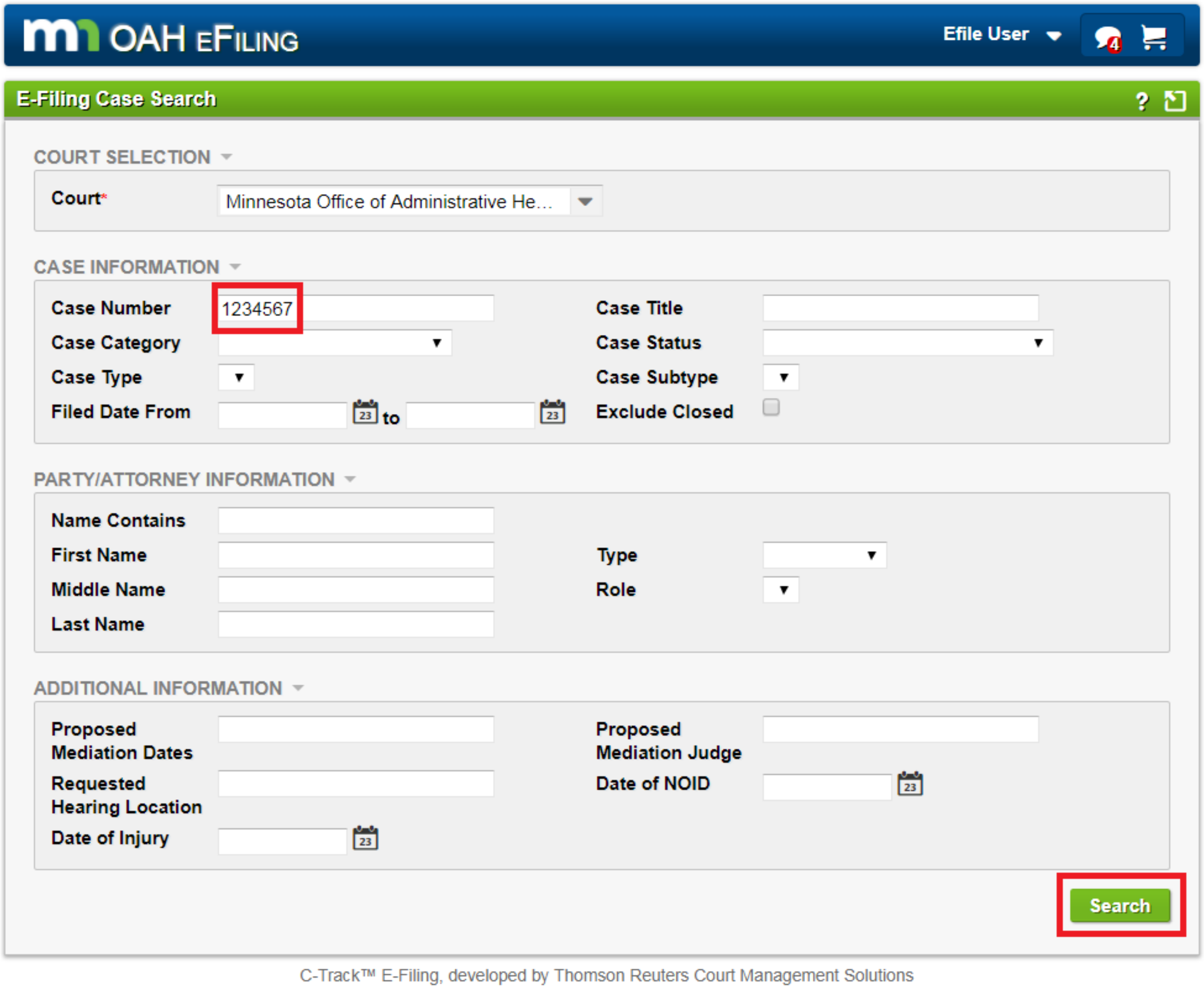


Image: Search for a case by WID

F. Search for a specific case with a party or attorney's name:

1. Enter the party or attorney's last name in the **Name Contains** field.

2. Click **Search**.

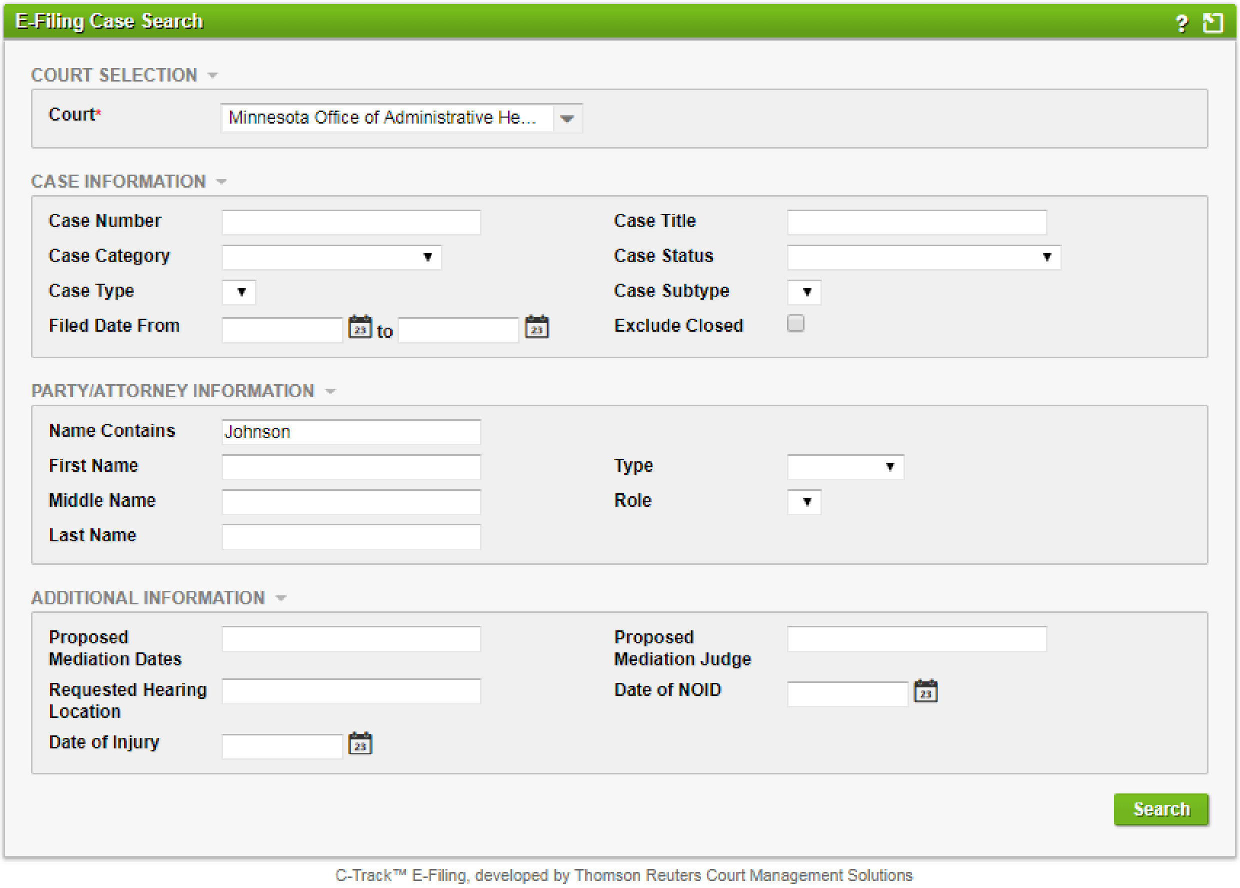


Image: Search by party or attorney name

V. eFile a New Case

Before you begin to eFile a new case, make sure you have the following information handy:

- Names, addresses and contact information for the employee, employer and insurer and any attorneys
- The employee’s WID
    - o Call DLI to obtain the WID if you do not have it. DLI’s workers’ compensation file review office can be reached at 651-284-5200; toll-free: 800-342-5354; and TTY: 651-297-4198.
- The relevant Dispute Type
- The relevant Date(s) of Injury
- The document(s) you wish to eFile, in Microsoft Word or PDF format

A. Enter Case and Filing Information

1. From the home screen, click **Create Filing** from the left menu.

What happens next? The **Create Filing** screen appears.

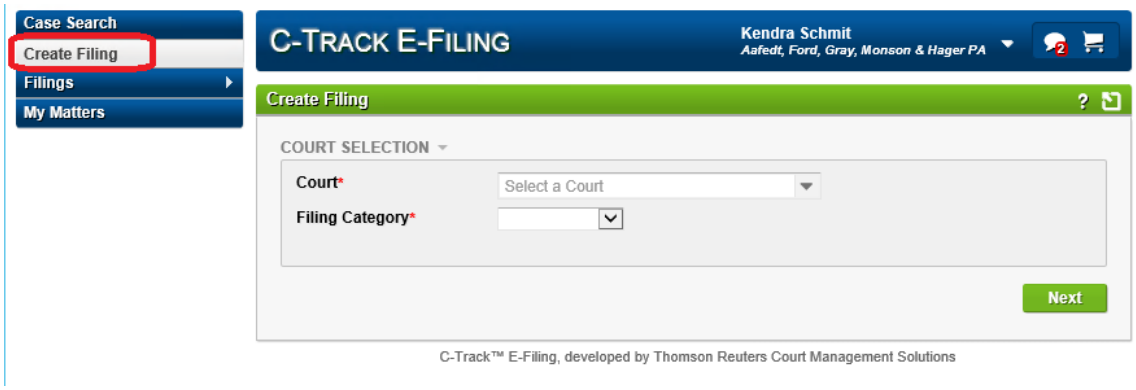


Image: Create Filing button and screen

2. Select a **Court**. For now, the only option is Minnesota Office of Administrative Hearings – Workers' Compensation.

3. Select **New Case** from the **Filing Category** dropdown.

What happens next? A second section, **New Case**, is added to the screen.

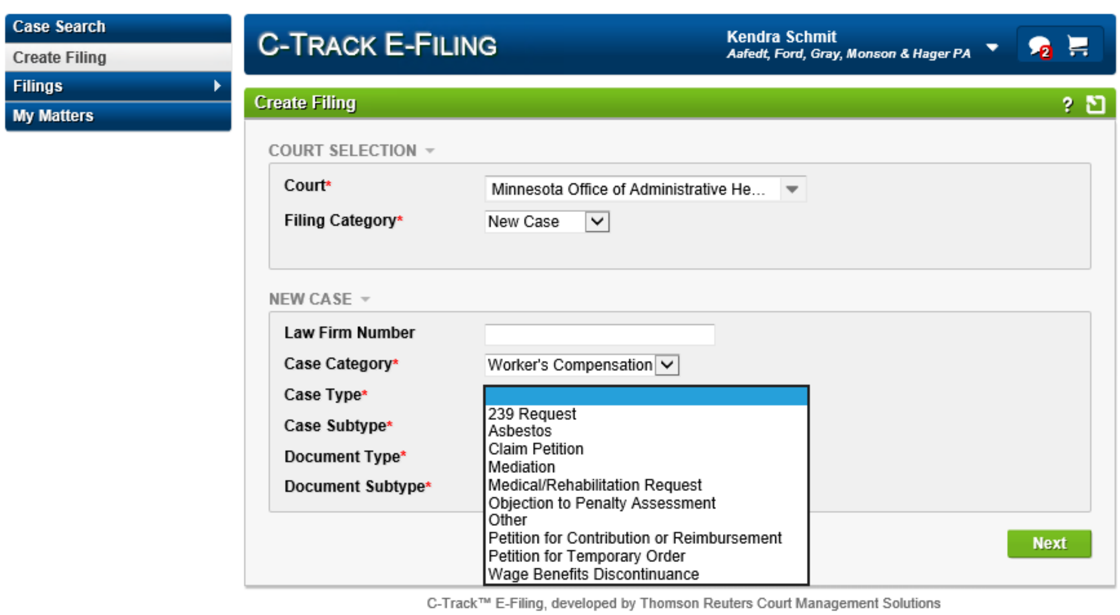


Image: New Case section – Case Type dropdown exposed

4. If you are associated with an organization and want to be able to search your cases by your internal file numbers, enter a **Law Firm Number**. This field is optional and only for internal use within your Legal Organization.

5. The **Case Category** field will prefill with **Workers' Compensation**. As OAH adds other divisions to the eFiling system over time, you may need to make a selection here.

6. Select a **Case Type**. This field represents the **type of dispute** you are creating.

7. If necessary, select a **Case Subtype**. Some Case Types only have one option for Case Subtype. If you choose one of those Case Types, the Case Subtype field will prefill. If the field prefills, you do not have to do anything.

8. Select **Document Type**. This field represents the specific type of document you are filing with OAH. This field may prefill based on the Case Type you select. If the field prefills, you do not have to do anything.

9. If necessary, select **Document Subtype**. Some Document Types only have one option for Document Subtype. If you choose one of those Document Types, the Document Subtype field will prefill. If the field prefills, you do not have to do anything.

10. Click **Next.**

> ➢ **NOTE**: Once you leave the Create Filing screen, the filing is automatically saved in Draft status. If you navigate to any other screen in the eFile application before you complete this filing, the filing can be found in **Filings > Draft** in the left navigation.

What happens next? The **Filing Information** section appears below the left navigation menu and the **Filing Progress Indicator** appears below the top eFiling banner. The **Party Information** indicator is highlighted and the **Party Information** screen appears.

Image: Filing Progress– Party Information screen

> ➢ **NOTE**: Each element of the Filing Progress Indicator is a link to the corresponding screen. You are not required to complete the screens in any particular order, but the Filing Progress is organized logically to help you enter all required information for a filing.

B. Enter Parties and Attorneys

<u>When eFiling a new case, you must enter at least 3 parties: the employee, employer, and insurer.</u> If you don't know the names and addresses of the employer, employee and insurer, you must locate that information prior to filing. It is the filer's responsibility to notify OAH of all known parties to the case.

> ➢ **NOTE**: Because you have to enter information for three parties when filing a new case, you will need to **take the following steps three times** – once for each party. If there are more than three parties, please do the steps whatever number of times is necessary to enter all parties of which you are aware.

i. Add Parties

1. Click **Add Party** at the bottom left of the screen.

What happens next? The **Party Information** window appears. This window expands with additional information based upon your selections in the **Role** and **Type** dropdowns.

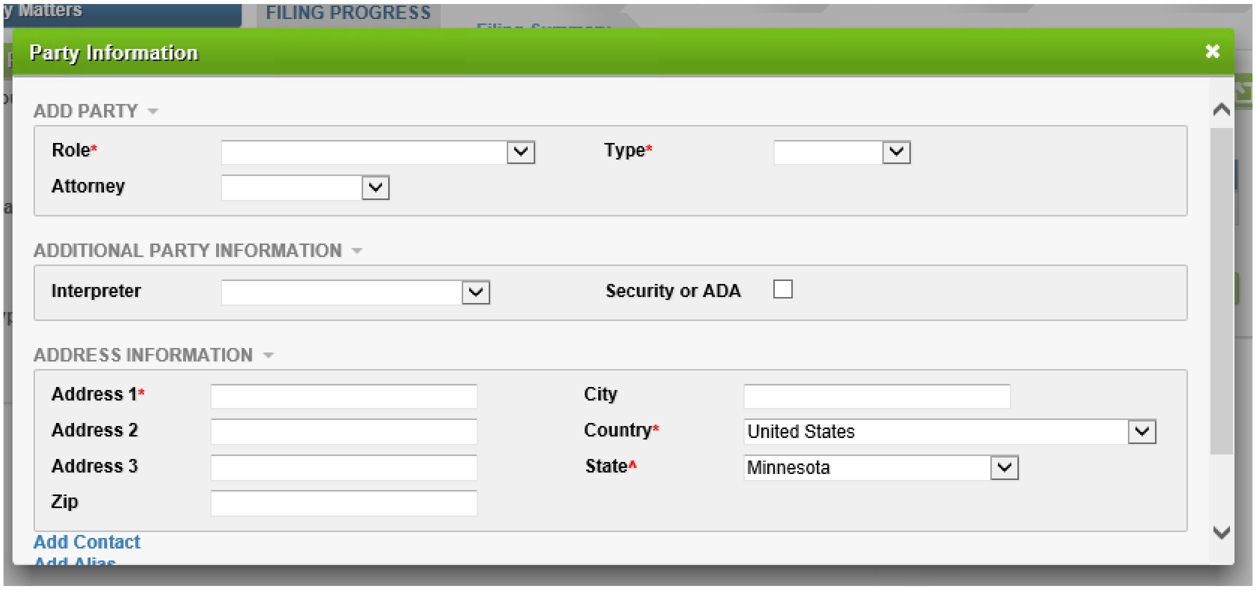


Image: Party Information window

2. Select the **Role** for the party you are adding.

3. From the **Type** dropdown, select **Person** if the party is an individual, or **Organization** if the party is a business or agency.

4. From the **Attorney** dropdown, select **Attorney** if the party you just selected above is represented by an attorney <u>and</u> you know the identity of the attorney. If you know that the party does not have an attorney, select **Self-Represented**. If you do not know, do not make a selection.

> ➢ **NOTE**: It is critical that you identify each party's attorney if you can. As soon as an attorney is identified in the system, that attorney will have electronic access to the case and be able to eFile and eServe**. If you don't identify the attorney, the system will not know that information and so access cannot be granted. In that case, you won't receive eService from that attorney** but will instead continue to receive mailed or other types of service. So – please include all attorneys representing parties that you've identifed in your filings – just as soon as you have that information.

5. Complete the required fields:

a. **Name.** If you selected **Person** from the Type dropdown, you must provide a first and last name. Middle name or initial is optional. If you selected **Organization** from the Type dropdown, you must provide an organization name.

b. **WID.** If you selected **Employee** from the Role dropdown, you must provide the Employee's Workers' ID (WID) number. If you do not have the WID number, call the Department of Labor and Industry at 651-284-5200 to get it.

c. **Address.** You must provide a mailing address.

6. If necessary, complete the optional **Additional Party Information** fields:

a. If the party requires an **Interpreter**, choose the requested language from the **Interpreter** dropdown.

b. If the party requires security or a reasonable accessibility accommodation, check the **Security or ADA** checkbox.

7. Enter a **primary phone number** for the party.

8. Enter an **email address** for the party.

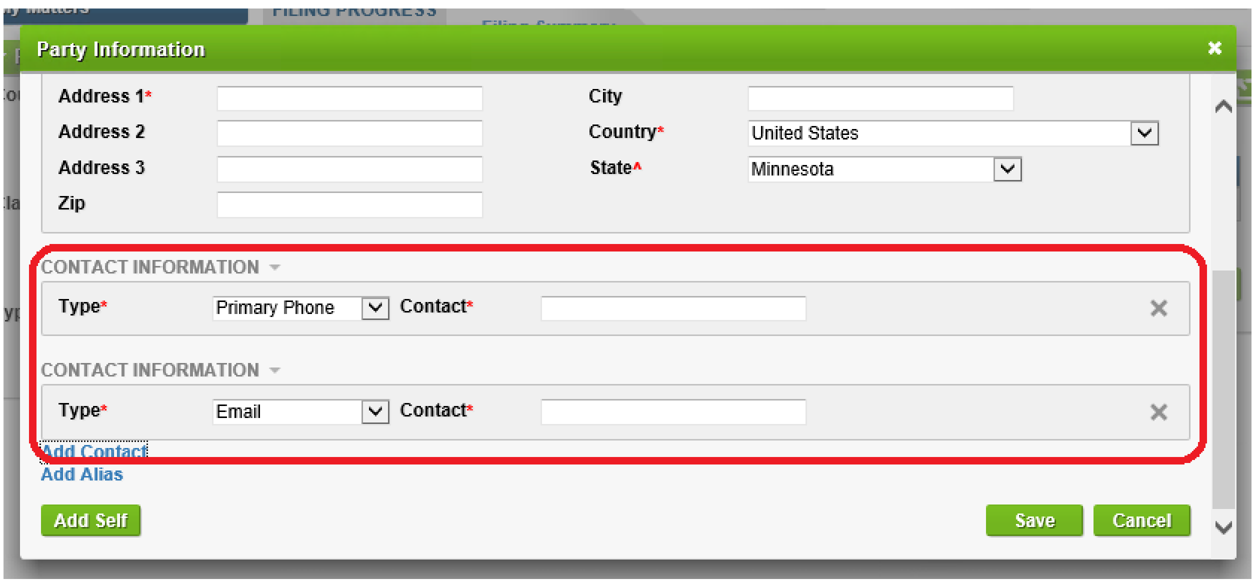


Image: Contact Information section of Party Information screen

> **NOTE**: The system indicates (red asterisk) that the email and primary phone fields are required. While OAH urges you to include an email address if you have it so that notice to parties can be accomplished electronically rather than by mail, we recognize that you will not always have contact information for all parties. To avoid the system requiring you to supply information you do not have, you can **click the grey X** on the far right corner of the **Contact Information** box to remove the box altogether.

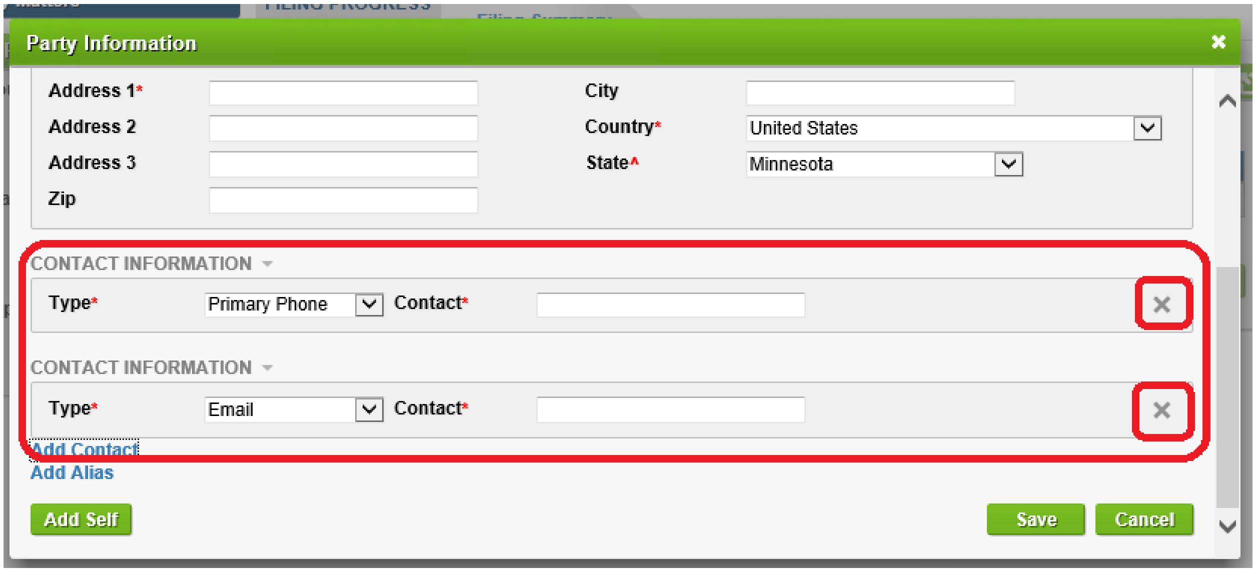


Image: Grey X to Remove Contact Information

9. If you want to add other contact information (secondary email, cell phone number, etc.), click **Add Contact**.

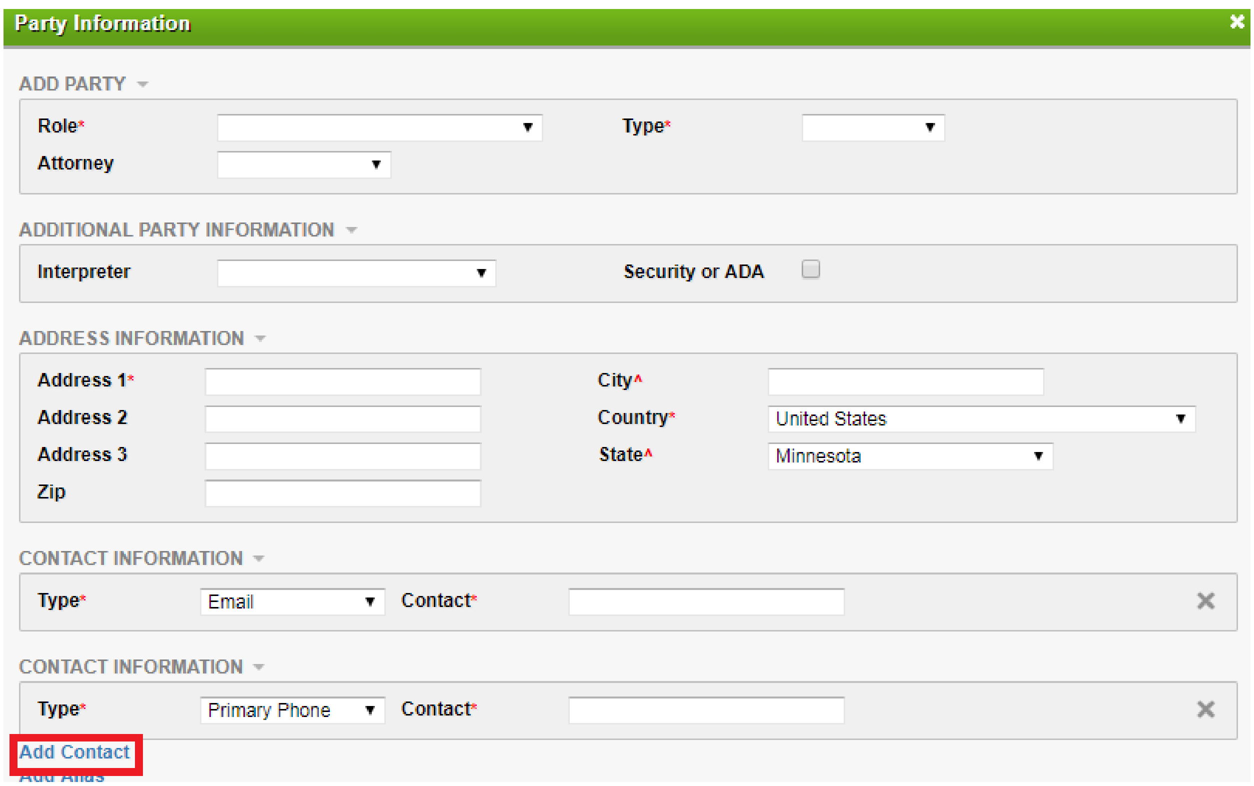


Image: Add Contact link

10. Click **Add Alias** if the party is a company doing business under another name or has another type of alias. Select the appropriate **Alias Type** from the dropdown menu and enter the party's alias in the **Name/Organization** box.

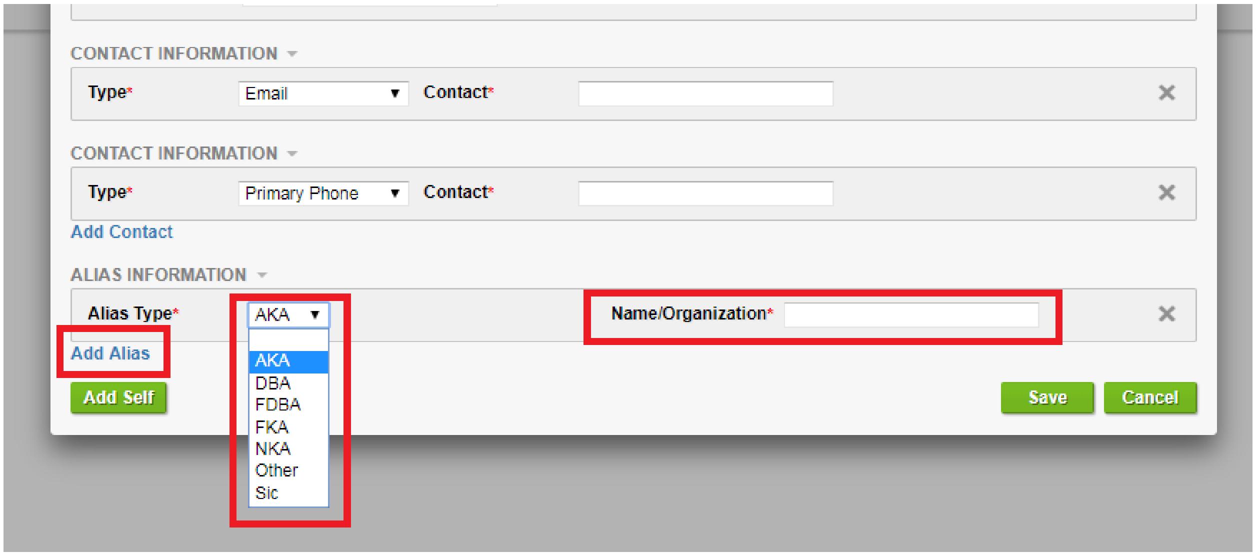


Image: Alias Information added

ii. Add Attorneys

When filing a new case, you **should add all attorneys** for (at least) the three parties identified. You must also add yourself, if you are a party's attorney. **Do not enter attorneys as separate parties.**

1. If you selected **Attorney** from the Attorney dropdown described above, an **Attorney** section was added to the bottom of the Party Information screen. To add an attorney for the party, click the **Add Attorney/Law Firm** link.

What happens next? The **Attorney Search** window appears.

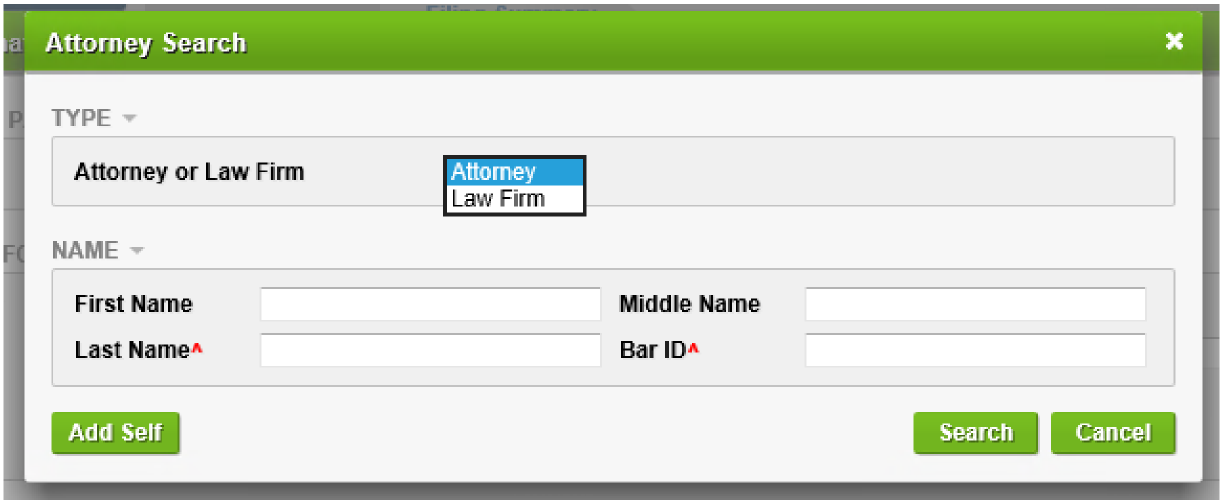


Image: Attorney Search window

2. Clicking the **Add Self** button adds the logged-in user as the selected party's attorney (if a support staff user is filing on behalf of an attorney, the attorney's name will populate).

3. Click **Add Self**.

> **NOTE:** The Add Self button will only appear on the Attorney Search window if the user has a Bar ID number associated with his or her account. If the Add Self button does not appear, search for your own name. If no results appear, click Add Attorney/Law Firm and complete the Add New Attorney form that appears. After your filing is completed, go to the User Administration screen and add your Bar ID number.

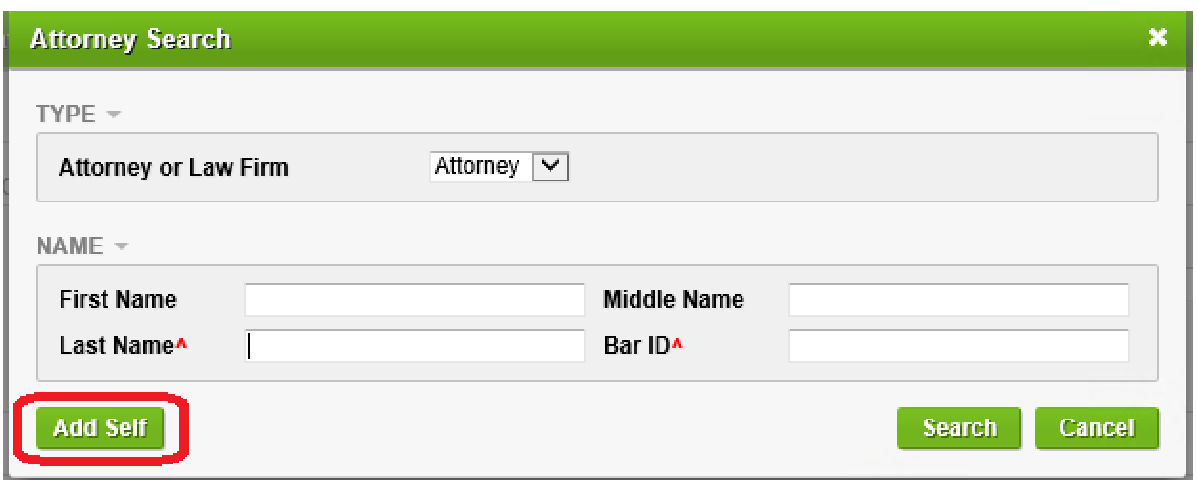


Image: Add Self button on Attorney Search window

4. To add an attorney other than the logged-in user, use the **Attorney Search** window to search for a specific attorney or a law firm. Select the type of search you wish to perform from the **Type** dropdown menu. Enter the last name of the attorney or the law firm name. Click **Search**.

What happens next? The search will return a list of attorneys that match the name you typed.

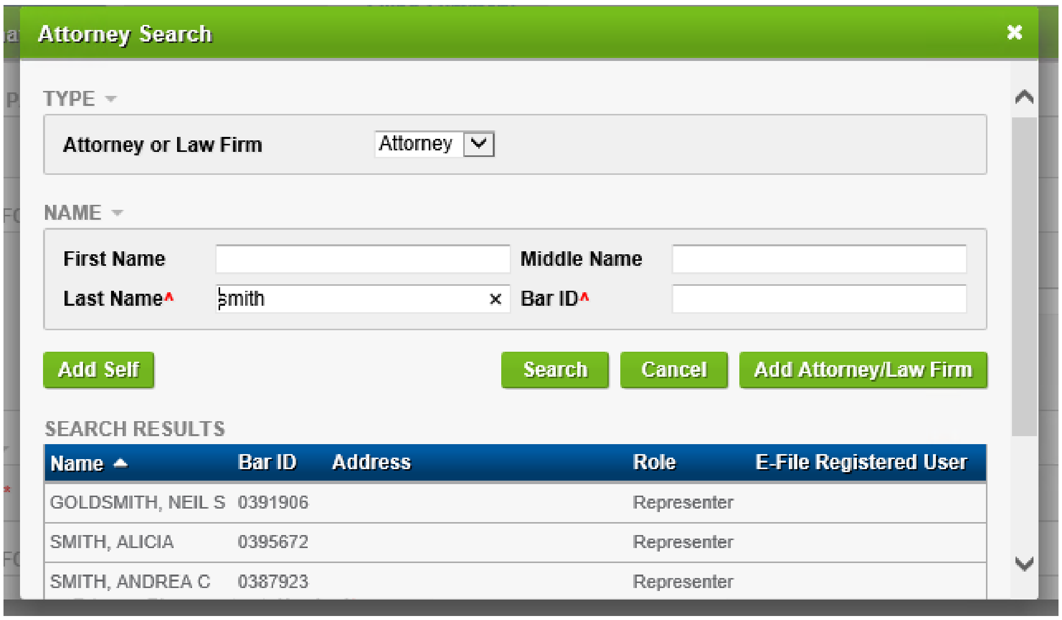


Image: Attorney Search – Search Results window

5. If the search returns the attorney or law firm you want, click on the name of the attorney or law firm you want.

What happens next? The system adds the selected attorney or law firm to the case as representing the party you entered at the top of the screen.

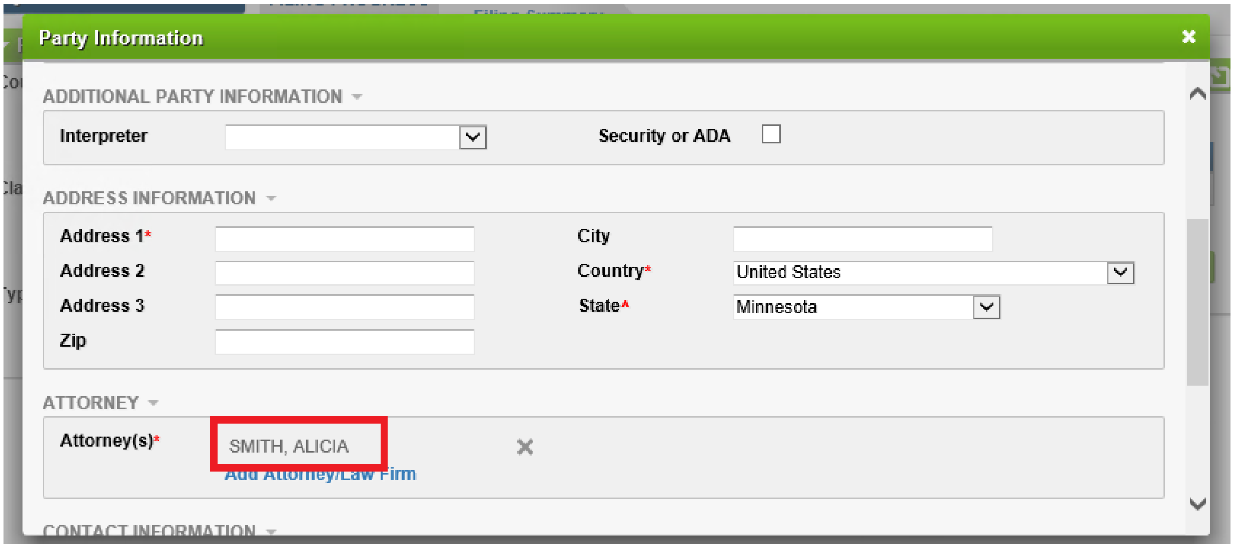


Image: Party Information screen – attorney added

> ➢ **NOTE**: If the search brings up the attorney or law firm and you add it, the system automatically adds the attorney's email and contact information into the case (from the existing system database). The filer does not need to add any contact information; it will already be added though you will not see it on this screen.

6. If necessary, you can remove the selected attorney by clicking the **grey X** to the right of the attorney's name.

7. If the search does not return the attorney or law firm you want, click on **Add Attorney/Law Firm** in the **Attorney Search screen.**

What happens next? The Add New Attorney screen appears.

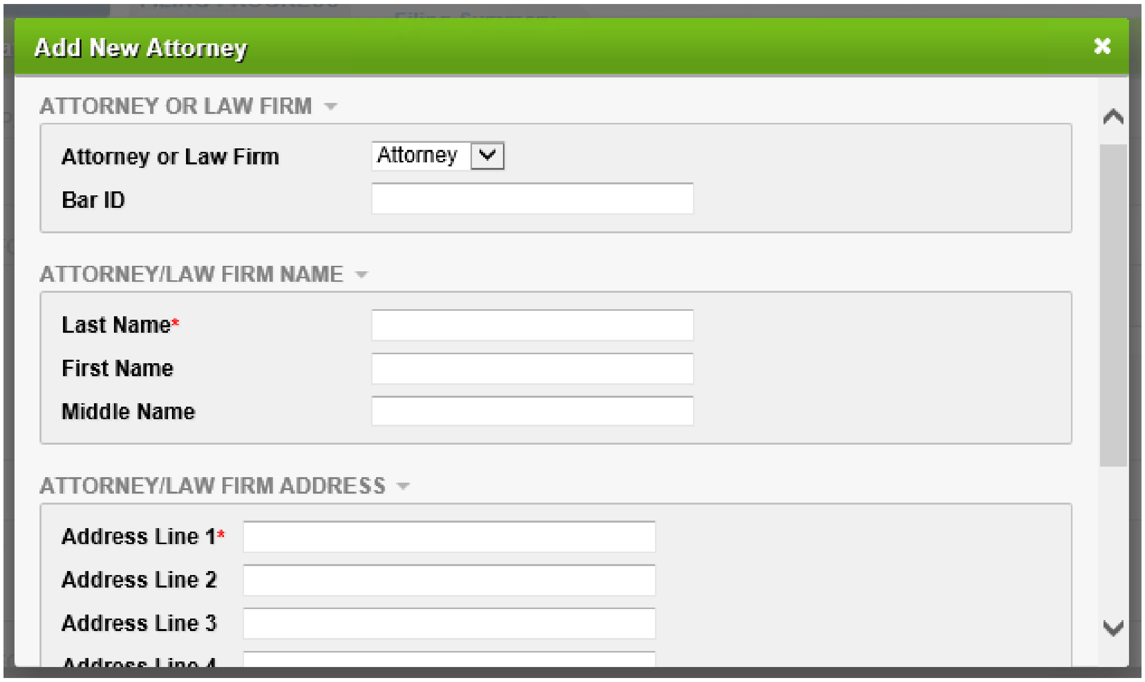


Image: Add New Attorney window

If necessary, you can remove the attorney by clicking the **grey X** to the right of the attorney's name.

8. Click **Save**.

What happens next? The party and attorney, if applicable, appears on the **Party Information** screen.

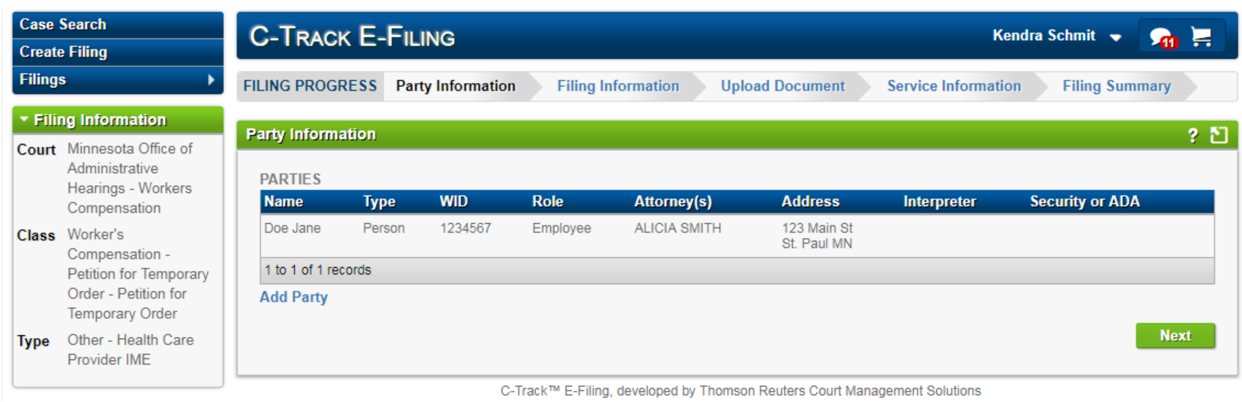


Image: Party Information screen – Party added

➢ **NOTE**: You must **repeat** all the Add Party and Attorney steps for each party you are adding to the case.

9. Click **Next**.

C. Complete Filing Information

The **Filing Information** indicator is highlighted and the **Filing Information** screen appears.

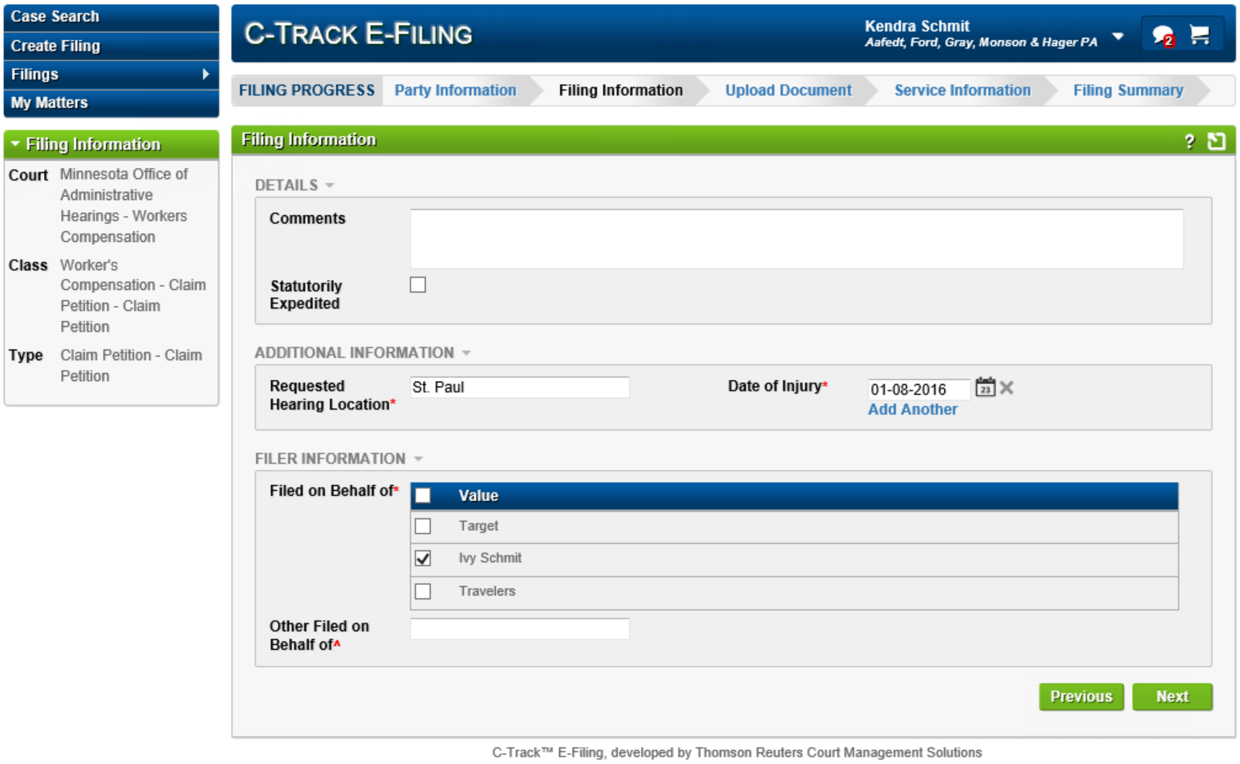


Image: Filing Information screen

1. Check **Statutorily Expedited** if applicable law requires that the matter be expedited.

2. Add the **Date of Injury**, by either selecting a date from the adjacent calendar or by typing the date in this format: MM-DD-YYYY. Click **Add Another** to enter multiple dates of injury.

> ➢ **NOTE**: **Date of Injury** is a required field. You must add it in order to proceed.

3. Add a **Requested Hearing Location**. Most often you will type in St. Paul or Duluth, but you may also request other locations. (The issued notice will inform you of the location set for any scheduled proceeding.)

4. Additional fields may appear under **Additional Information** depending on the selected Case Type selected. Complete any fields that are marked with a red asterisk.

5. Under **Filer Information**, click the checkbox(es) next to the party(ies) for whom you are filing.

6. Click **Next**.

D. Upload Documents

The **Upload Document** screen has a single section. It will allow you to upload Microsoft Word and PDF files (25 megabyte limit) as well as audio and video files (1 gigabyte limit) when used as exhibits.

> ➢ **NOTE**: OAH prefers that documents be submitted in Word format. If you upload PDF files, OAH prefers that documents be created in a word processing application, and then saved as a PDF file before eFiling. This process allows OAH to annotate filed documents. You should not print documents on paper and scan them as PDF files unless doing so is necessary to prepare the documents for eFiling, as this process does not allow for annotation. Most word processing programs can convert documents to PDF files through a "save as" functionality, and free PDF conversion software is available online.

Image: Upload Document screen

1. Click **Browse** or **Choose File.** (This button language changes based on the Internet browser used). The name of the document to be uploaded is pre-populated based on the Filing Type and Filing Subtype you selected.

2. A browser window opens to allow you to navigate to a file on your personal computer that you want to upload.

3. Select the file you want to upload.

4. Click **Open**.

What happens next? You return to the **Upload Document** screen. The document title appears to the right of the **Browse/Choose File** button.

5. If necessary due to the file size limits, click **Add Another** to upload multiple parts of the same document. Do not use **Add Another** to submit multiple filings at once.

6. Click **Next**.

E. Review Filing Summary

The **Filing Summary** screen shows all information entered on the previous eFiling screens.

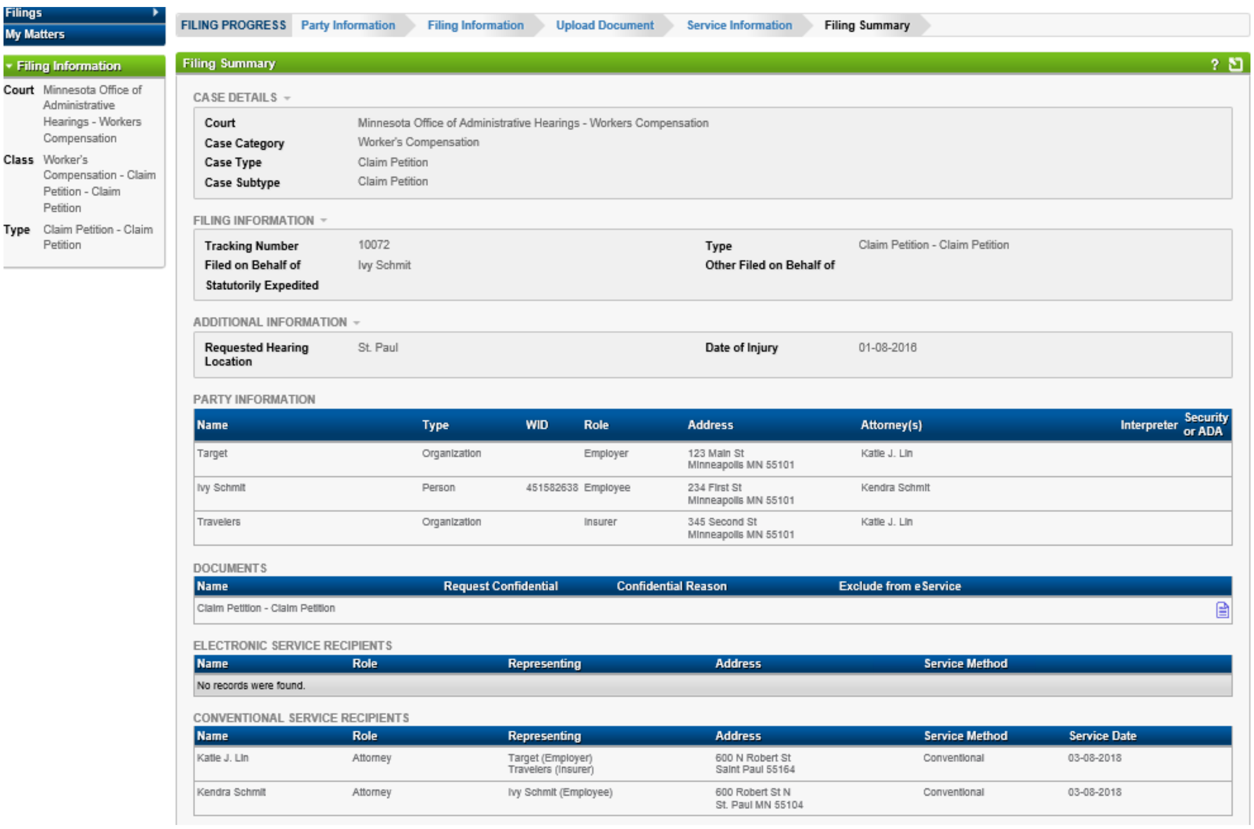


Image: Filing Summary screen

1. Review all the information on the screen in detail before proceeding.

2. If necessary, you can edit information in two ways:

a. Click the relevant link in the **Filing Progress** bar at the top of the screen to navigate back to that particular screen

OR

b. Click **Edit Filing** at the bottom of the Filing Summary screen to navigate back to the beginning of the Filing Progress – the **Party Information** screen.

3. If necessary, click **Add Additional Filing** to add a separate filing that belongs to the same case. Additional filings appear as separate Docket Entries on the case.

4. If you wish to remove the filing, click **Delete This Filing** at the bottom of the screen to move the filing to the **Draft** queue. You can completely delete the filing from the Draft Filings Queue by clicking Filings > Draft in the left navigation.

5. If necessary, review the information in the **Errors** section at the top of the screen. You must resolve any errors before proceeding.

> ➢ **NOTE**: The **Case Number** will be blank for initiating filings, as the case number is not assigned until OAH accepts your filing. When OAH accepts your filing, you will receive email confirmation, including the case number.

F. Add Additional Filing (Optional)

An additional filing is a separate document that belongs to the same case and is related to your primary filing. Additional filings appear as separate Docket Entries on the case. **If you are submitting a Proposed Order with your filing, it should be uploaded in Word format (not PDF) as an Additional Filing using the Proposed Order document type. Do not combine a Proposed Order or Award on Stipulation as part of the underlying Motion or Stipulation.** You may file any document type as an Additional Filing. This example shows how to file a Proposed Order as an Additional Filing.

1. From the Filing Summary screen, click **Add Additional Filing**.

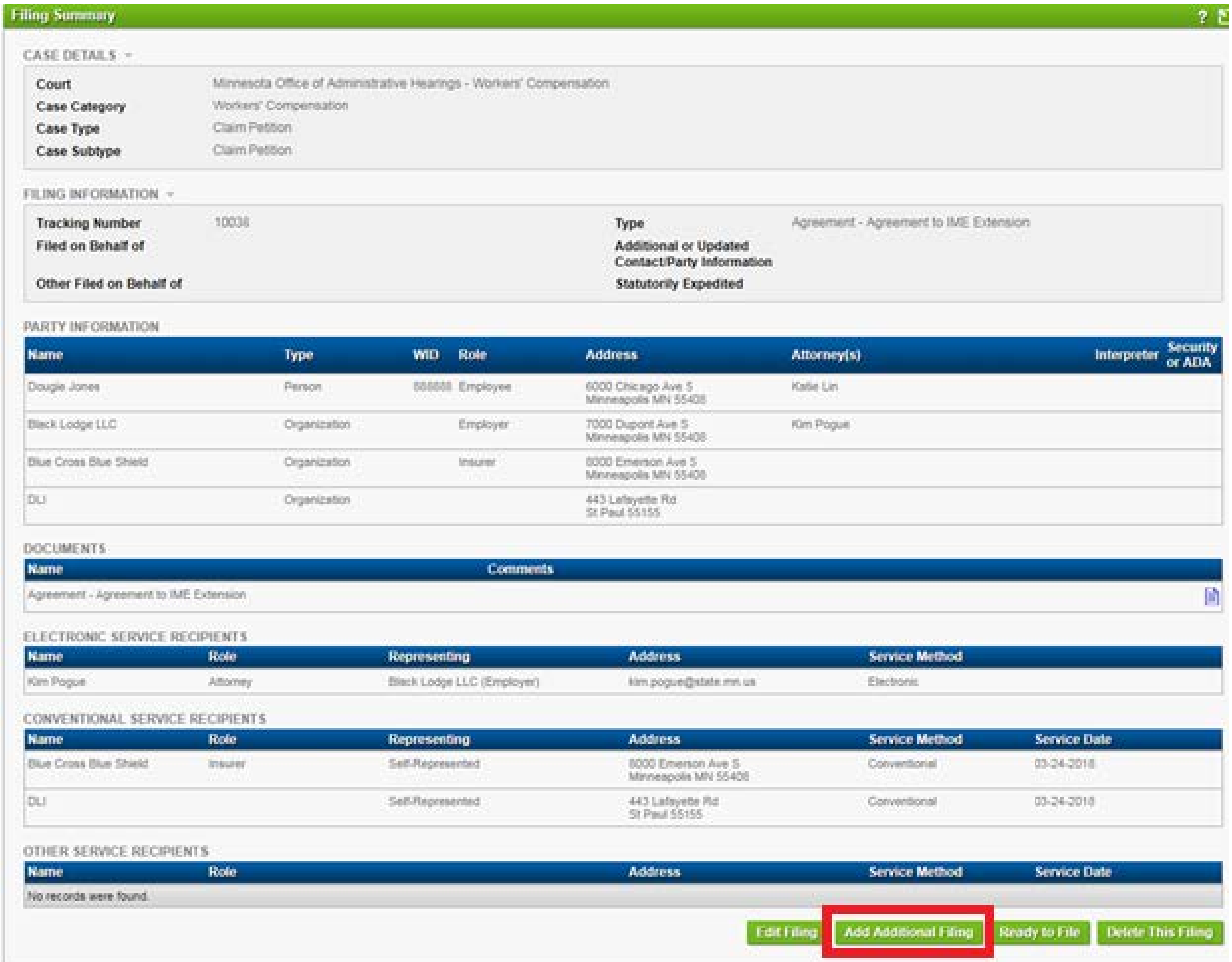


Image: Filing Summary screen – Add Additional Filing button

2. The system automatically pre-fills the case information from your primary filing. Choose the type of document you are filing from the **Document Type** and **Document Subtype** dropdowns. Proposed Order – Award on Stipulation is selected in this example. Note that the associated filing is listed on the left side of the screen.

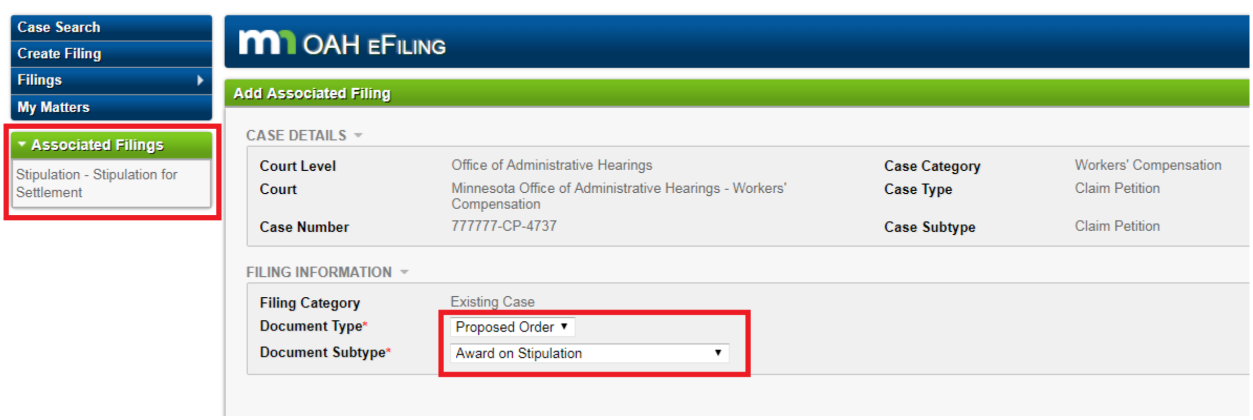


Image: Add Associated Filing screen

3. Complete the required information on the **Filing Information**, **Upload Document** and **Service Information** screens for your associated filing, as described in steps VI A-C above.

G. Add Filing to Cart and Submit

1. When you reach the **Filing Summary** screen, click **Ready to File**. If you are submitting associated filings, clicking Ready to File will add all associated filings to your cart.

What happens next? The **Cart** screen appears.

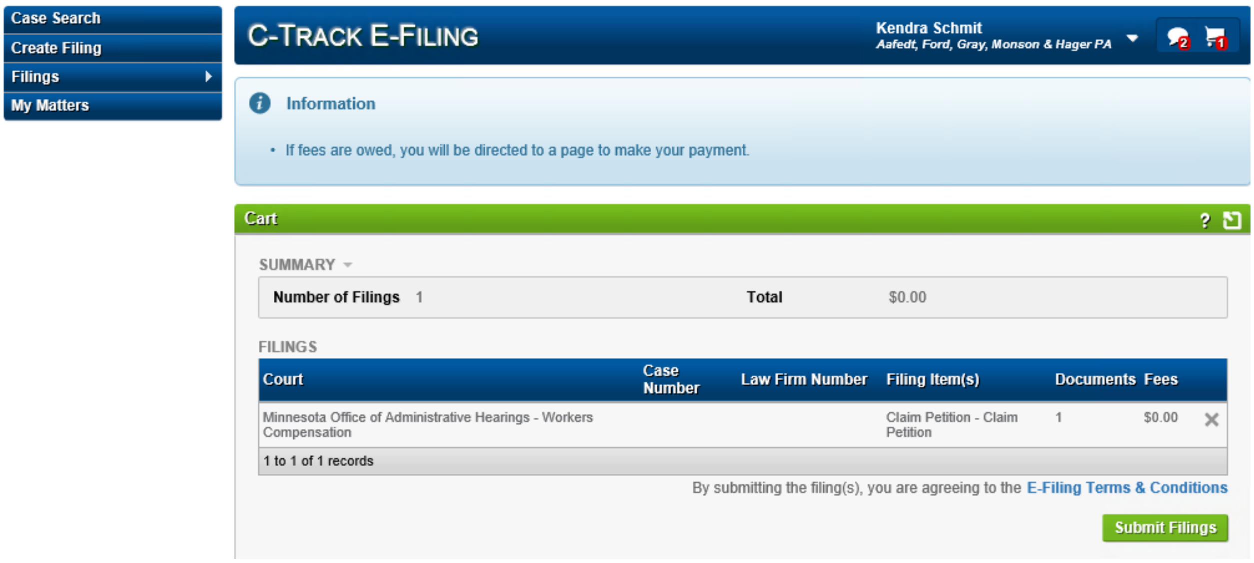


Image: Cart screen

2. Review the information in the **Filings** section.

To remove a filing from the **Cart**, click the **X** at the far right of any line item. When you remove a filing from the **Cart,** a **Confirm** window requires that you **OK** the removal. The filing is moved to the **Draft** queue, found through **Filings > Draft** in the left navigation menu.

3. Click **Submit Filings**.

What happens next? The **Submission Confirmation** screen appears. This information can be accessed at any time from the left navigation menu via **Filings > Submitted**.

Image: Submission Confirmation screen

> ➢ **NOTE**: The **Print** button opens a separate browser window to save or print a PDF of the **Submission Confirmation**.

Give yourself a gold star! You have successfully eFiled a new case.

What happens next? OAH processes the filing. You will be notified when the filing has been accepted via email or in the eFiling application, based on the Notification preference you selected in section II, part G of this guide.

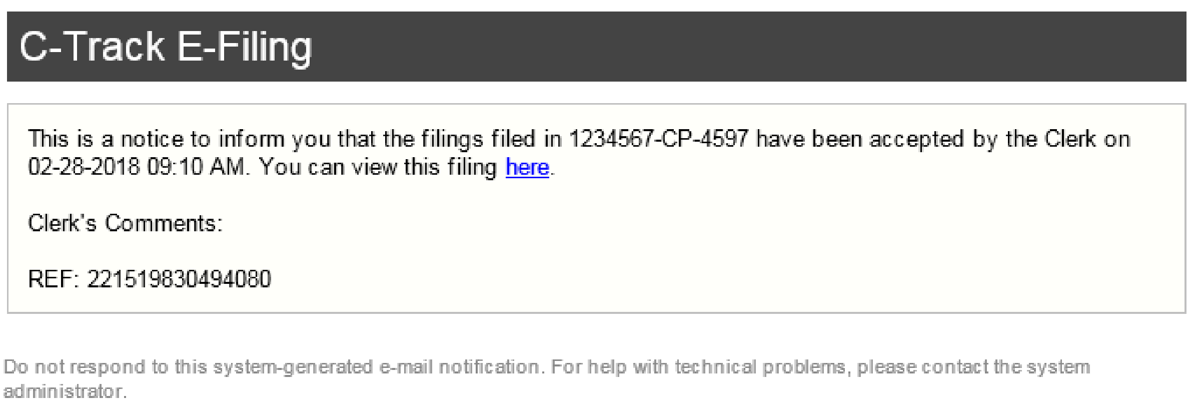
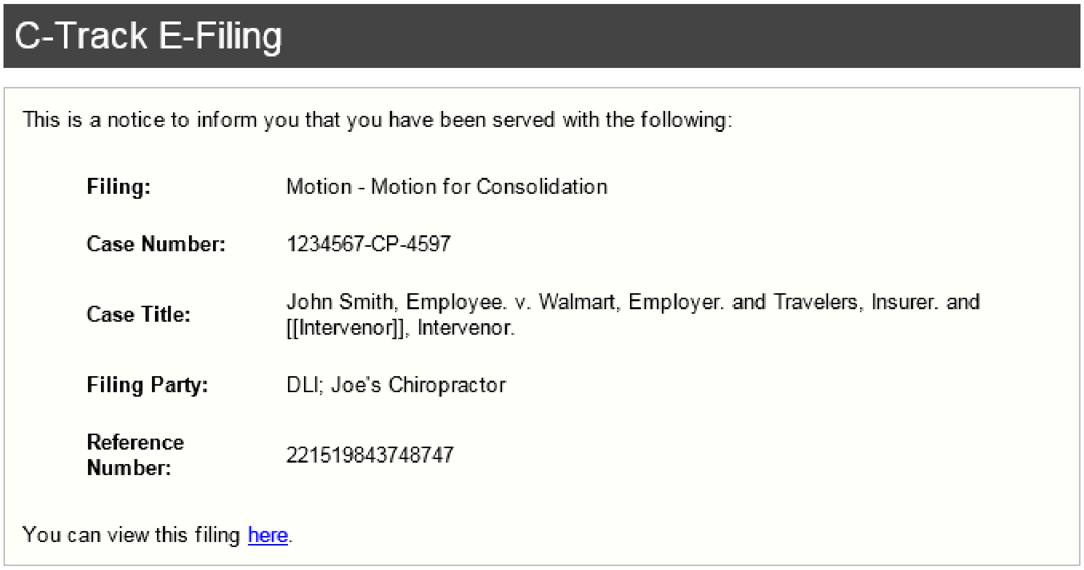


Image: Email Acceptance Notification

G. Electronic Service

Once your filing is accepted, **any party that has opted in** to the new OAH system will be served electronically with the filing you submitted. When the filing is electronically distributed, the party receives an email similar to the notification shown below, and can access the filed document(s) by clicking on the provided link. At this point, OAH staff will send you an email notifying you which parties were eServed. <u>You are responsible for serving the remaining parties conventionally.</u>


C-Track E-Filing

This is a notice to inform you that you have been served with the following:

Filing:	Motion - Motion for Consolidation
Case Number:	1234567-CP-4597
Case Title:	John Smith, Employee. v. Walmart, Employer. and Travelers, Insurer. and [[Intervenor]], Intervenor.
Filing Party:	DLI; Joe's Chiropractor
Reference Number:	221519843748747

You can view this filing here.

Image: eService Notification Email to Served Party

VI. eFile a Document on an Existing Case

Before you begin to create an eFiling on an existing case, make sure you have the following information:

- Names, addresses and emails for all parties and their attorneys (if applicable)
- The case number. (For information about the components that make up the case number, please review section IV, part A of this guide.)
- The document(s) you wish to eFile, in Microsoft Word or PDF format

A. Enter Case and Filing Information

1. From the home screen, click **Create Filing** from the left menu.

What happens next? The **Create Filing** screen appears.

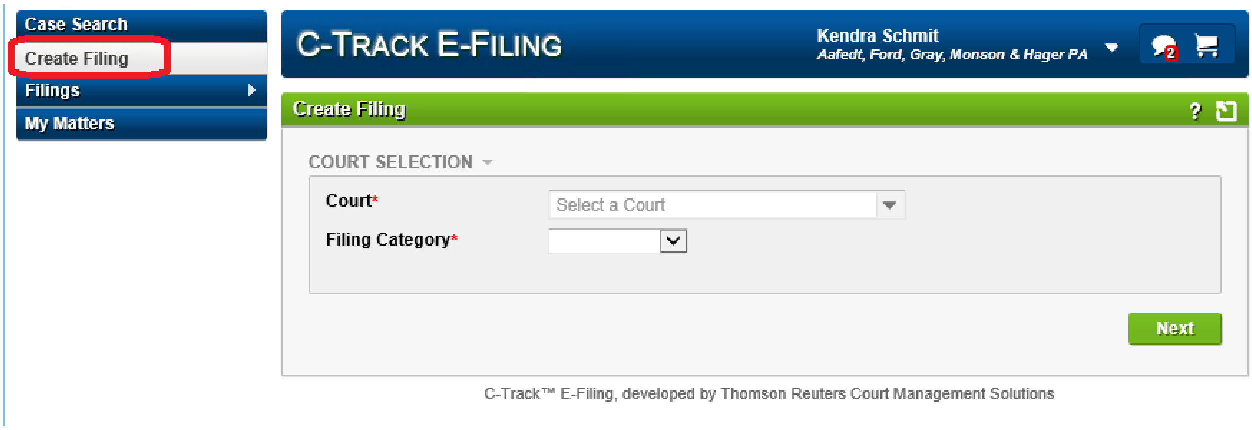


Image: Create Filing screen

2. Select a **Court**. For now, there is only one option (Minnesota Office of Administrative Hearings – Workers Compensation).Select **Existing Case** from the **Filing Category** dropdown.

3. Enter the **Case Number**.

4. Select the **Document Type**. This field represents the specific type of document you are uploading.

5. Select **Document Subtype**. Some Document Types only have one option for Document Subtype. If you choose one of those Document Types, the Document Subtype field will prefill.

6. Click **Next**.

What happens next? The **Filing Information** screen appears.

B. Enter Filing Information and Updated or New Party Contact Information

7. Check **Statutorily Expedited** if applicable law requires that your filing be expedited.

8. Check a **Filed on Behalf of** check box in the **Filer Information** section.

a. If the party you are filing for is not listed, leave the check boxes blank and type the party's name in the **Other Filed on Behalf of** box.

9. If you are aware of any parties to the case that are not listed in the **Filed on Behalf of** section of the page, type the party's name, mailing address and email address in the **Additional or Updated Contact/Party Information** box. Additionally, type any updated contact information in this box.

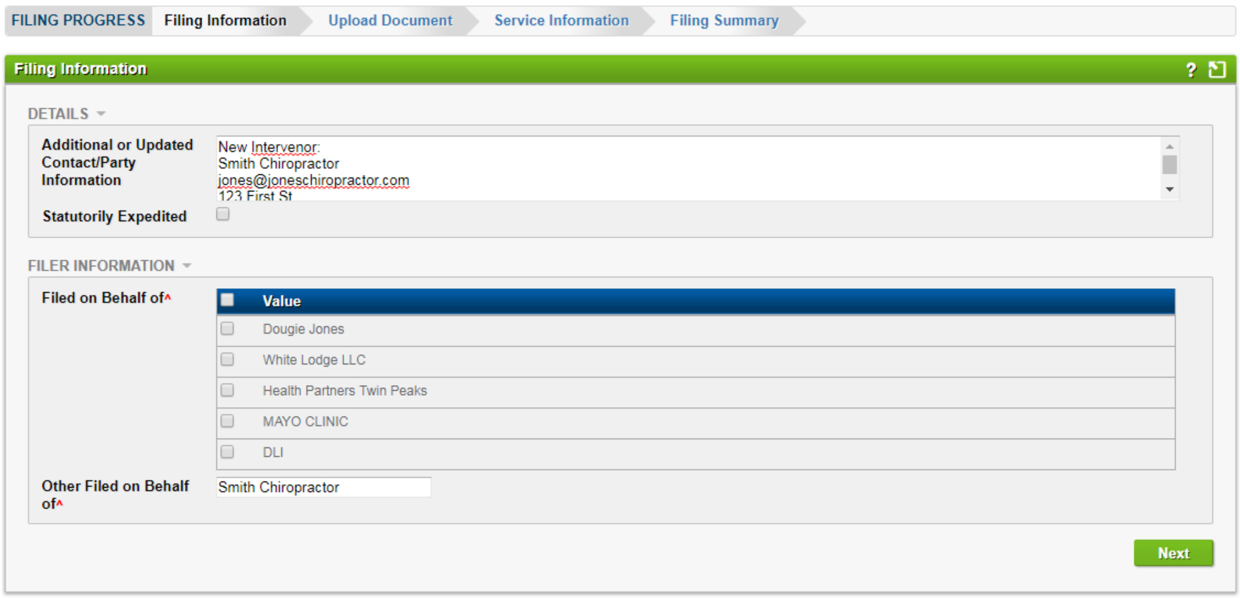


Image: Filing Information screen

10. Click **Next**.

What happens next? The **Upload Document** screen appears. The name of the document to be uploaded is pre-populated based on the Filing Type and Filing Subtype you selected.

C. Upload Document(s)

The **Upload Document** screen has a single section. It will allow you to upload Microsoft Word and PDF files (25 megabyte limit) as well as audio and video files (1 gigabyte limit) when used as exhibits.

> ➢ **NOTE:** OAH prefers that documents be submitted in Word format. If you upload PDF files, OAH prefers that documents be created in a word processing application, and then saved as a PDF file before eFiling. This process allows OAH to annotate filed documents. You should not print documents on paper and scan them as PDF files unless doing so is necessary to prepare the documents for eFiling, as this process does not allow for annotation. Most word processing programs can convert documents to PDF files through a "save as" functionality, and free PDF conversion software is available online.

Image: Upload Document screen

1. Click **Browse** or **Choose File.** (This button language changes based on the Internet browser used). The name of the document to be uploaded is pre-populated based on the Filing Type and Filing Subtype you selected.

2. A browser window opens to allow you to navigate to a file on your personal computer that you want to upload.

3. Select the file you want to upload.

4. Click **Open**.

What happens next? You return to the **Upload Document** screen. The document title appears to the right of the **Browse/Choose File** button.

5. If necessary due to the file size limits, click **Add Another** to upload multiple parts of the same document. Do not use **Add Another** to submit multiple filings at once.

6. Click **Next**.

D. Enter Service Information

The **Service Information** screen organizes parties based on their service method:

a. **Electronic Service Recipients** lists parties that have opted in to receive eService. All Electronic Service Recipients will receive service via the eFiling application. You do not need to serve Electronic Service Recipients. The eFiling system will serve these recipients.

b. **Conventional Service Recipients** lists parties that have not opted in to receive eService, and so must be served by mail, fax, personal service or other means authorized by law. **You are responsible for serving all Conventional Service Recipients.**

- **NOTE**: Click the **Apply to All** icon that appears to the right of the Service Method and Service Date fields to apply the data in those fields to all recipients.
- Click the **Date Picker** icon to access a calendar which lets you select a month and day to populate the field.

1. Select **Service Method** for each party.
2. Enter a **Service Date** for Conventional Service Recipients.
3. Click **Next**.

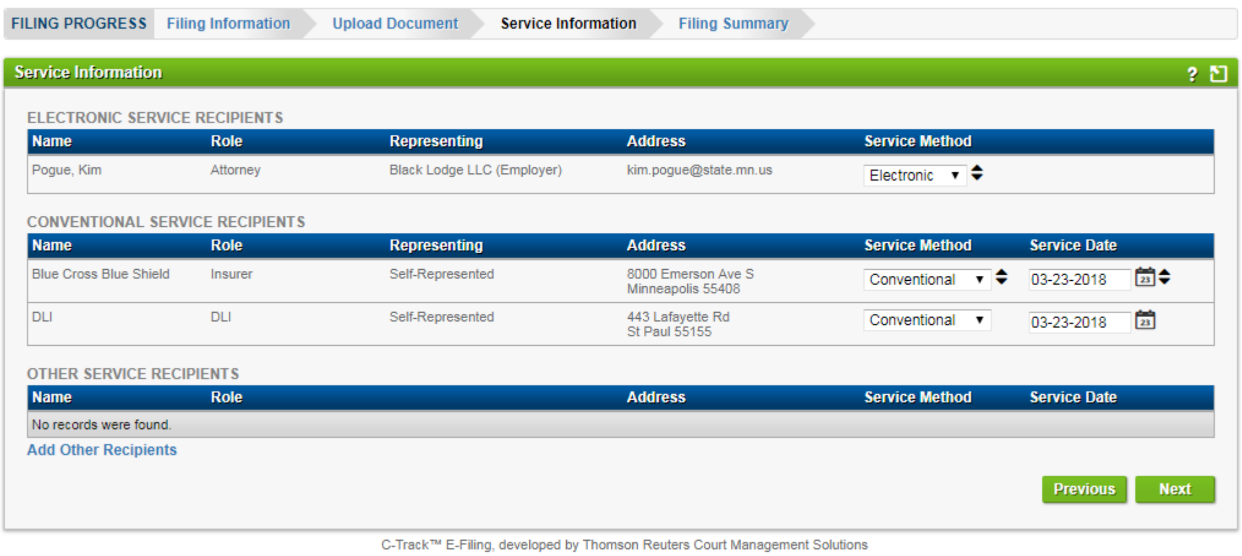
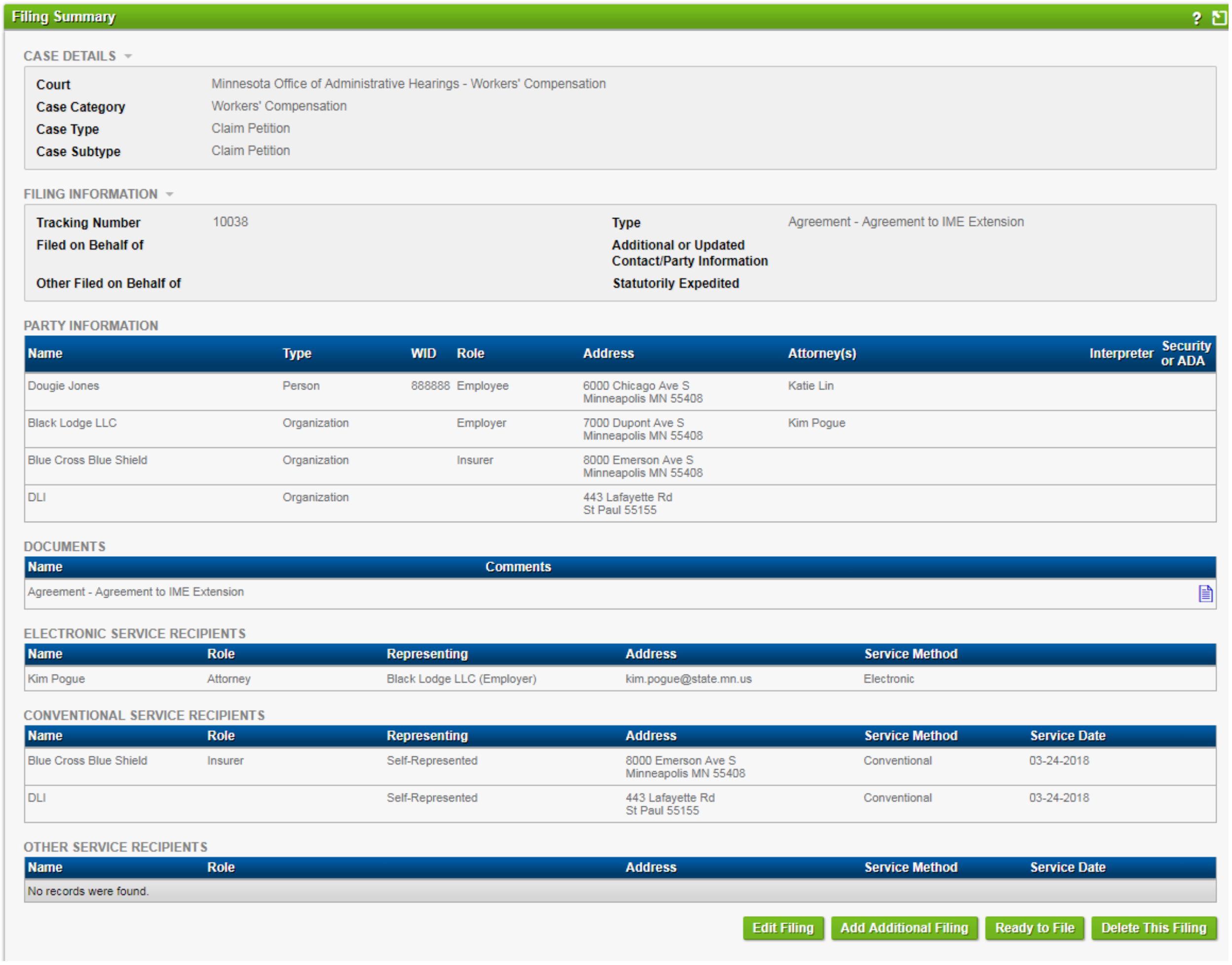


Image: Service Information screen

E. Review Filing Summary

What happens next? The **Filing Summary** screen appears. The **Filing Summary** screen shows all information entered on the previous screens.



Filing Summary

CASE DETAILS

Court	Minnesota Office of Administrative Hearings - Workers' Compensation
Case Category	Workers' Compensation
Case Type	Claim Petition
Case Subtype	Claim Petition

FILING INFORMATION

Tracking Number	10038	**Type**	Agreement - Agreement to IME Extension
Filed on Behalf of		**Additional or Updated Contact/Party Information**	
Other Filed on Behalf of		**Statutorily Expedited**	

PARTY INFORMATION

Name	Type	WID	Role	Address	Attorney(s)	Interpreter	Security or ADA
Dougie Jones	Person	888888	Employee	6000 Chicago Ave S Minneapolis MN 55408	Katie Lin		
Black Lodge LLC	Organization		Employer	7000 Dupont Ave S Minneapolis MN 55408	Kim Pogue		
Blue Cross Blue Shield	Organization		Insurer	8000 Emerson Ave S Minneapolis MN 55408			
DLI	Organization			443 Lafayette Rd St Paul 55155			

DOCUMENTS

Name	Comments
Agreement - Agreement to IME Extension	

ELECTRONIC SERVICE RECIPIENTS

Name	Role	Representing	Address	Service Method
Kim Pogue	Attorney	Black Lodge LLC (Employer)	kim.pogue@state.mn.us	Electronic

CONVENTIONAL SERVICE RECIPIENTS

Name	Role	Representing	Address	Service Method	Service Date
Blue Cross Blue Shield	Insurer	Self-Represented	8000 Emerson Ave S Minneapolis MN 55408	Conventional	03-24-2018
DLI		Self-Represented	443 Lafayette Rd St Paul 55155	Conventional	03-24-2018

OTHER SERVICE RECIPIENTS

Name	Role	Address	Service Method	Service Date
No records were found.				

Edit Filing | Add Additional Filing | Ready to File | Delete This Filing

Image: Filing Summary screen

1. Review all the information on the screen in detail before proceeding. If necessary, you can edit information in two ways:

a. Click the relevant link in the **Filing Progress** bar at the top of the screen to navigate to that particular screen

OR

b. Click **Edit Filing** at the bottom of the screen to navigate back to beginning of the Filing Progress – the **Party Information** screen.

2. If you wish to remove the filing, click **Delete This Filing** at the bottom of the screen to move the filing to the **Draft** queue. You can completely delete the filing from the Draft Filings Queue by clicking Filings > Draft in the left navigation.

F. Add Additional Filing (Optional)

An additional filing is a separate document that belongs to the same case and is related to your primary filing. Additional filings appear as separate Docket Entries on the case. **<u>If you are submitting a Proposed Order with your filing, it should be uploaded in Word format (not PDF) as an Additional Filing using the Proposed Order document type. Do not combine a Proposed Order or Award on Stipulation as part of the underlying Motion or Stipulation.</u>** You may file any document type as an Additional Filing. This example shows how to file a Proposed Order as an Additional Filing.

1. From the Filing Summary screen, click **Add Additional Filing**.

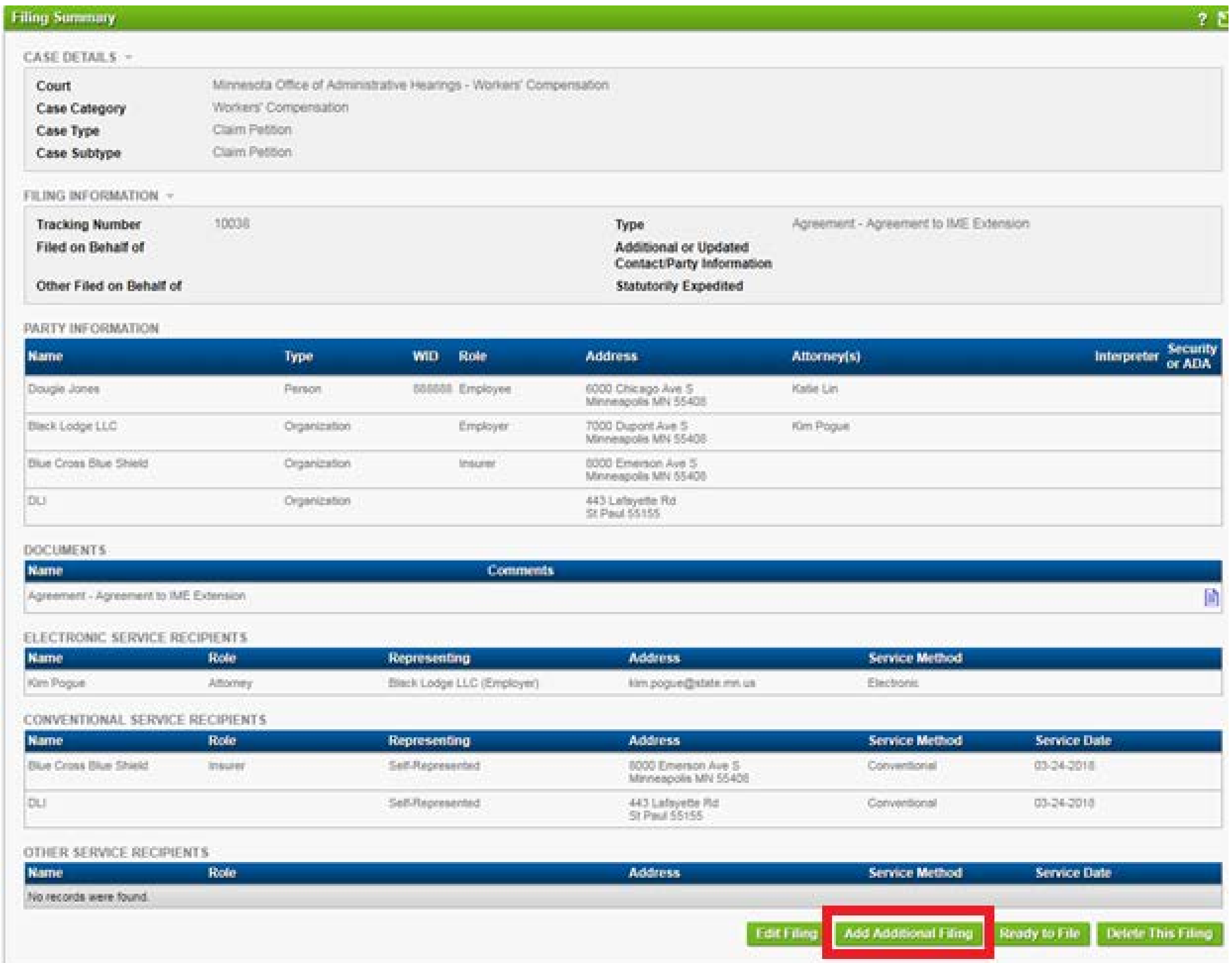


Image: Filing Summary screen – Add Additional Filing button

2. The system automatically pre-fills the case information from your primary filing. Choose the type of document you are filing from the **Document Type** and **Document Subtype** dropdowns. Proposed Order – Award on Stipulation is selected in this example. Note that the associated filing is listed on the left side of the screen.

Image: Add Associated Filing screen

3. Complete the required information on the **Filing Information**, **Upload Document** and **Service Information** screens for your associated filing, as described in steps VI A-C above.

G. Add Filing to Cart and Submit

1. When you reach the **Filing Summary** screen, click **Ready to File**. If you are submitting associated filings, clicking Ready to File will add all associated filings to your cart.

What happens next? The **Cart** screen appears.

Image: Cart screen

2. Review the information in the **Filings** section.

To remove a filing from the **Cart**, click the **X** at the far right of any line item. When you remove a filing from the **Cart,** a **Confirm** window requires that you **OK** the removal. The filing is moved to the **Draft** queue, found through **Filings > Draft** in the left navigation menu.

3. Click **Submit Filings**.

What happens next? The **Submission Confirmation** screen appears. This information can be accessed at any time from the left navigation menu via **Filings > Submitted**.

Image: Submission Confirmation screen

➢ **NOTE**: The **Print** button opens a separate browser window to save or print a PDF of the **Submission Confirmation**.

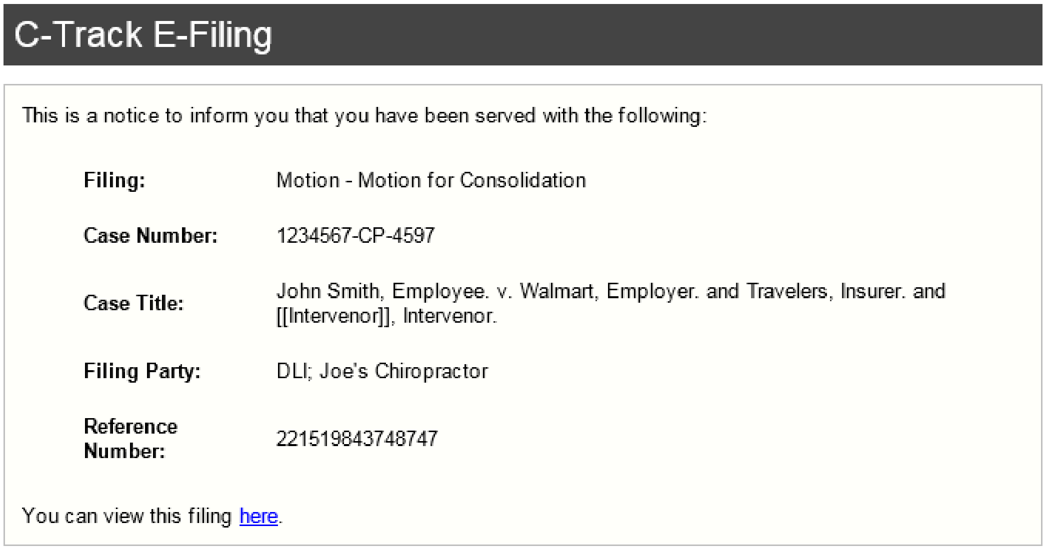
You have successfully eFiled a document on an existing case. Yay you!!!

What happens next? OAH processes the filing. You will be notified that the filing has been accepted via email or in the eFiling application, based on the Notification preference you selected in section II, part G of this guide.

Image: Filing Acceptance Confirmation Email

H. Electronic Service

Once your filing is submitted, any party that was listed as an electronic service recipient is served electronically with your filing immediately. When the filing is eServed, the party receives an email similar to the notification shown below, and can access the filed document(s) by clicking on the provided link:



C-Track E-Filing

This is a notice to inform you that you have been served with the following:

Filing:	Motion - Motion for Consolidation
Case Number:	1234567-CP-4597
Case Title:	John Smith, Employee. v. Walmart, Employer. and Travelers, Insurer. and [[Intervenor]], Intervenor.
Filing Party:	DLI; Joe's Chiropractor
Reference Number:	221519843748747

You can view this filing here.

Image: eService Notification to served party

VII. Resubmit a Rejected Filing

If your filing gets rejected, you don't need to start over! Here's how to resubmit your filing without losing all your work:

1. From the Filings menu in eFiling, click **Rejected**.
2. Click the **Arrow** button in the Resubmit column.
3. You will receive the following message: "Are you sure you want to resubmit this Filing? Clicking OK will save a copy of this filing to your Draft Filings Queue."
4. Click **OK**.
5. The original filing will be displayed.
6. Use the gray arrows near the top of the screen to jump to the Filing Information, Party Information or Upload Document screen.
7. Edit the information that caused your filing to be rejected.

8. Click **Next**.

9. Click **Ready to File** at the bottom of the screen.

10. Click **Submit Filings**.

VIII. Law Firm Matter Numbers and Matter Sharing

The My Matters feature allows members of a legal organization to enter their own internal file number into the eFiling system. The matter number may be entered on new cases or existing case filings, as long as the user files while associated to their Legal Organization. Filers may share the Law Firm Number, and filings related to that Law Firm Number, with other eFilers in the same Legal Organization.

A. Legal Organization "Switch Association" Function

eFilers associated to a Legal Organization can easily share matters and filings among attorneys and staff within the organization, delegate file access so other attorneys in the firm can file on their behalf, and input their own firm's file number for each case.

To switch from your personal account to your Legal Organization account:

1. Click the down arrow next to your name in the top-right corner of the screen.

2. Click **Switch Association.**

3. Select your legal organization from the dropdown menu.

4. Click **Save**.

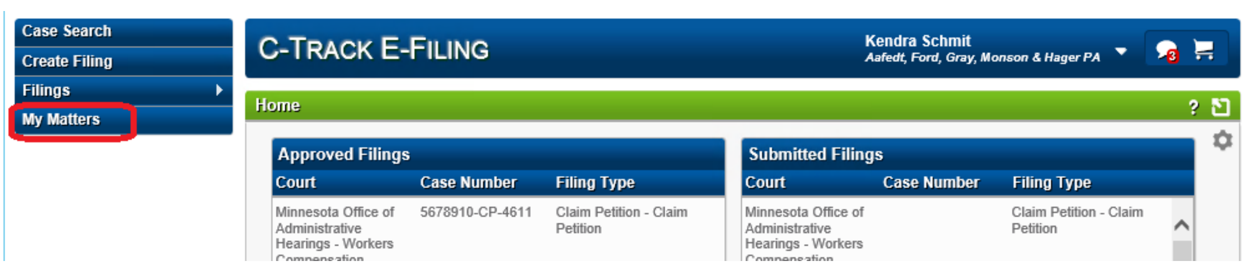


Image: Home screen and My Matters link

Once you switch to the legal organization, **My Matters** appears in the left navigation menu, and your Legal Organization name appears below your name.

B. Add a Law Firm Matter Number to a Case

1. Click **My Matters** in the left navigation menu.

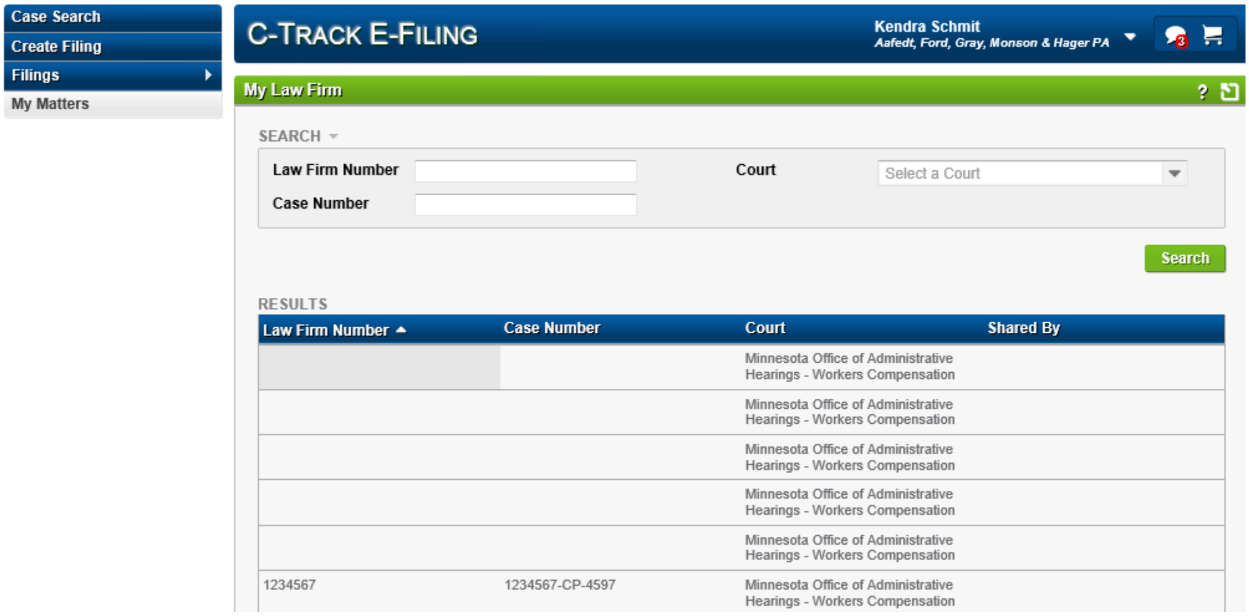


Image: My Law Firm Matters screen

2. Click the case for which you want to add a **Law Firm Number**.

What happens next? The **Law Firm Matter View** screen appears.

The **Law Firm Matter View** screen has three sections.

- The **Case Information** section provides summary information about the case and is not editable.
- The **Law Firm Details** section shows the **Legal Organization** to which the matter is associated and the **Law Firm Number**.
- The **Law Firm Sharing** display table shows the **Name**, **Email**, **Address** and **Active** status of colleagues with whom you have shared a Matter. The **Add Colleague** link lets you share your Matters with other members of your Legal Organization.

3. Click the **Edit** link in the **Law Firm Details** section.

Image: Law Firm Matter View screen

What happens next? The **Edit Law Firm** window appears.

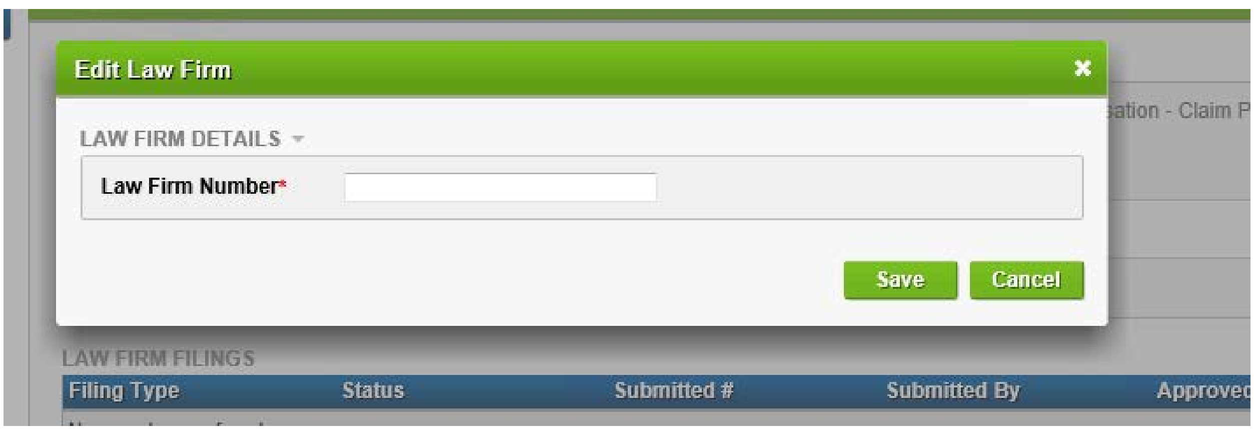


Image: Edit Law Firm Number window

4. Enter a **Law Firm Number**.

5. Click **Save**.

What happens next? The Law Firm Number you entered appears in the **Law Firm Details** section and your user information displays in the **Law Firm Sharing** section.

C. Associate and Share with Authorized Support Staff

There are two ways to share cases with support staff:

1. Attorneys can share their passwords with support staff, allowing staff to log in and file directly from the attorney's account.

2. Support staff users can create separate accounts and link their account to an attorney's account. Once this is set up, support staff can view the attorney's cases and submit a filing on behalf of the attorney.

On the User Administration screen, the **Authorized Support Staff** section lets you add support staff who are registered eFilers in your Legal Organization. Authorized Support Staff may view your filings and submit filings on your behalf on any of your cases. If you associate your support staff, there is no need to share specific matters with them.

> ➢ **NOTE:** Authorizing support staff to file on your behalf **will not** ensure that support staff receive copies of your electronic service. See section III of this user guide for detailed instructions to ensure your support staff receives copies of your electronic service.

1. Before beginning, ensure that your support staff have registered for an eFiling account, and that their account is associated with your legal organization.

2. Click the arrow next to your name in the top eFiling banner.

3. Click **My Organizations.**

4. Click **View/Edit** under Support Staff.

Image: View/Edit Support Staff link

5. The Authorized Support Staff window appears.

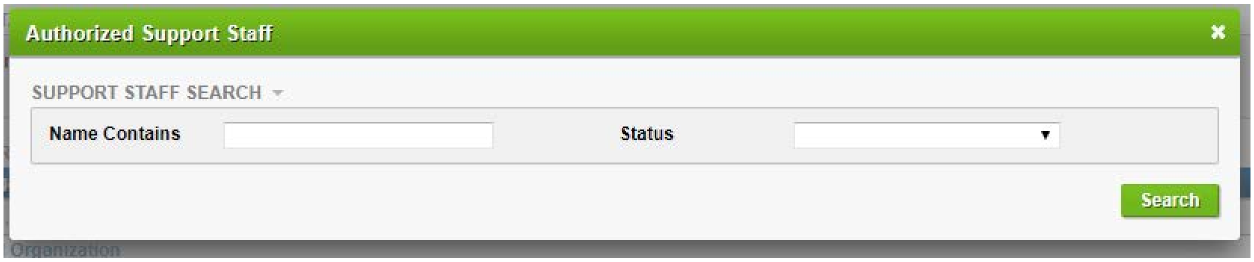


Image: Authorized Support Staff window

6. Click **Search.**
7. Click **Add Support Staff**.

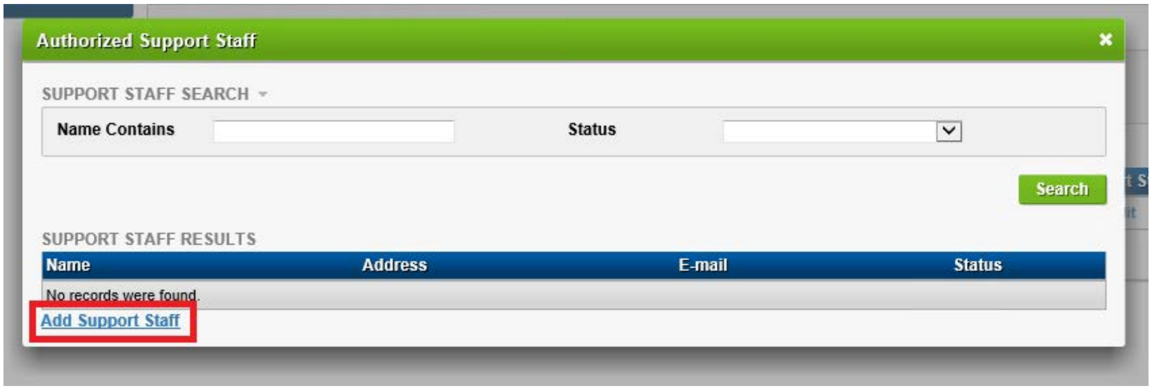


Image: Add Support Staff link

8. Enter at least three letters of the staff's first or last name.
9. Click **Search**.
10. Click the individual you want to add.
    a. If the user does not appear in search results, try using fewer search terms. Contact the individual to ensure that they have registered for eFiling **and** that both of your accounts are linked to the same legal organization.
11. Repeat the process for any additional support staff users.
12. To remove staff, click the **X** at the far right of **Authorized Support Staff** line item. A **Confirm** window appears to confirm the removal of Authorized Support Staff.

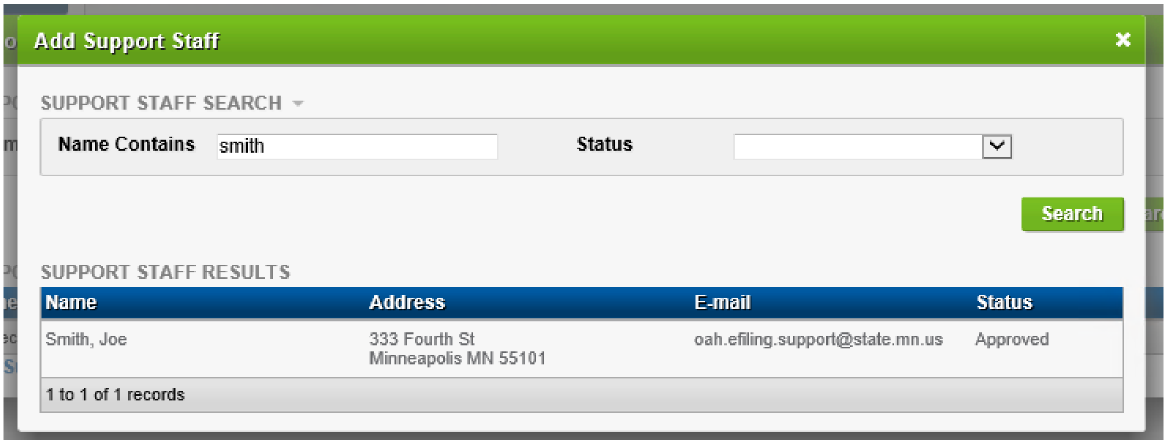


Image: Add Support Staff window – support staff added

D. Switch Accounts

If someone in your legal organization has associated you as Authorized Staff as described in the previous section of this guide, you can access their account to view and complete filings on their behalf. To switch to that filer's account:

1. Click the down arrow to the right of your username in the top banner navigation.

What happens next? The **User Account** menu appears.

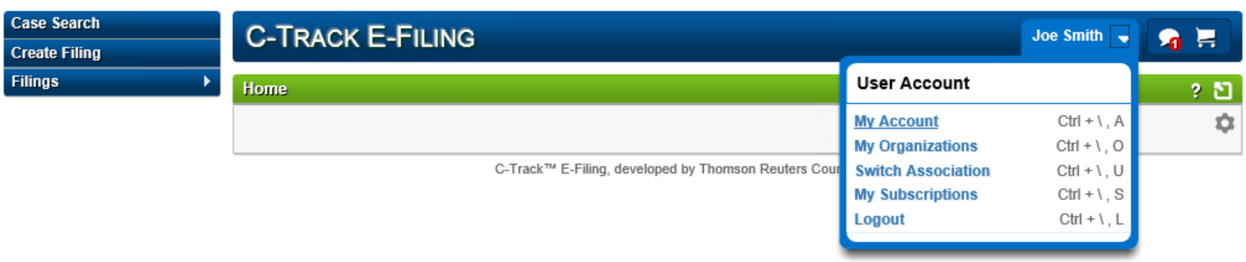


Image: User Account menu

2. Click **Switch Association**.

What happens next? The **Select Authorizing eFile User** window appears.

3. Select your law firm from the **Legal Organization** dropdown.
4. From the **Authorizing eFile User** drop down, select the eFiler for whom you will be filing.

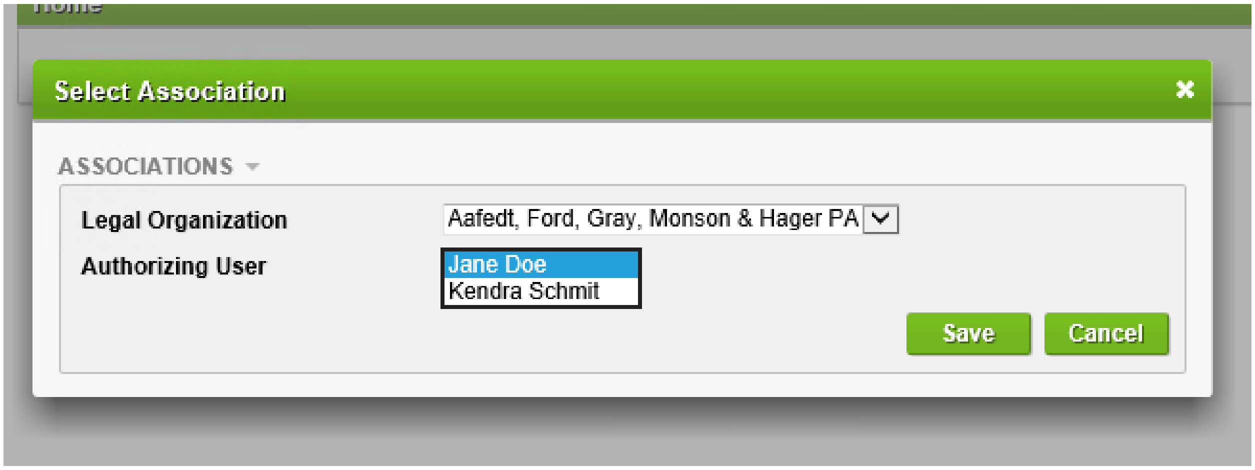


Image: Select Authorizing eFile User window

5. Click **Save**.

What happens next? You return to the **Home** screen. The authorized eFile user's name appears below your name, and the Legal Organization appears below your authorized eFile user in the upper-right banner.

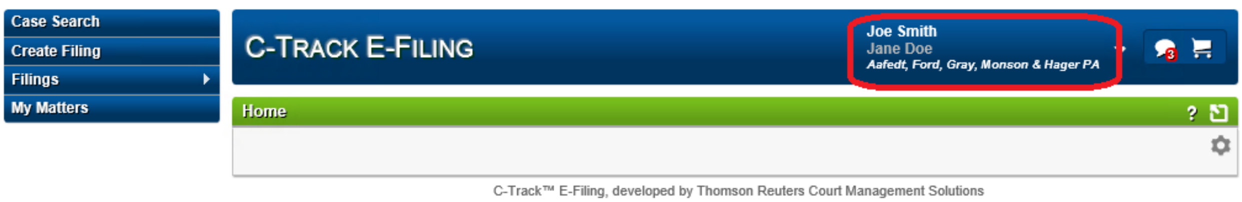


Image: Home screen with Authorizing eFiler displayed

6. You can now submit filings on behalf of the Authorizing eFiler. You can view the eFiler's filings, including draft filings. If the **Authorizing eFiler** was logged into the eFile application, the system would display identical information. However, staff are currently not permitted to use the Case Search function or view the attorney's Case View. Staff should log into the attorney's account in order to search for case numbers or locate information about a particular case.

7. Proceed with the filing instructions above just like with any other filing.

E. Share a Case with a Colleague

When a case is shared, other authorized eFilers in the Legal Organization may view the case. However, sharing a matter with a colleague will not add them to OAH's service list. In order to be served with case documents, your colleague should file a document on the case or file a request to be added to the list. If you have associated a member of your legal organization as Authorized Support Staff as described in the previous section of this guide, they are automatically granted access to all of your cases and it is not necessary to share specific matters with them.

1. From the matter view, click the **Add Colleague** link at the bottom left of the **Law Firm Sharing** display table.

What happens next? The **Add Colleague** window appears.

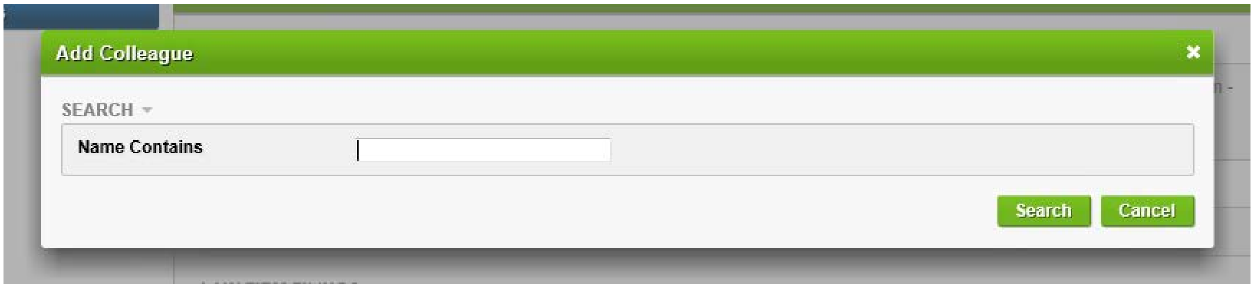


Image: Add Colleague search window

2. Enter at least 3 letters of the colleague's name in the **Name Contains** box.

3. Click **Search**.

4. All matching eFilers in your legal organization appear in the **Add Colleague** table.

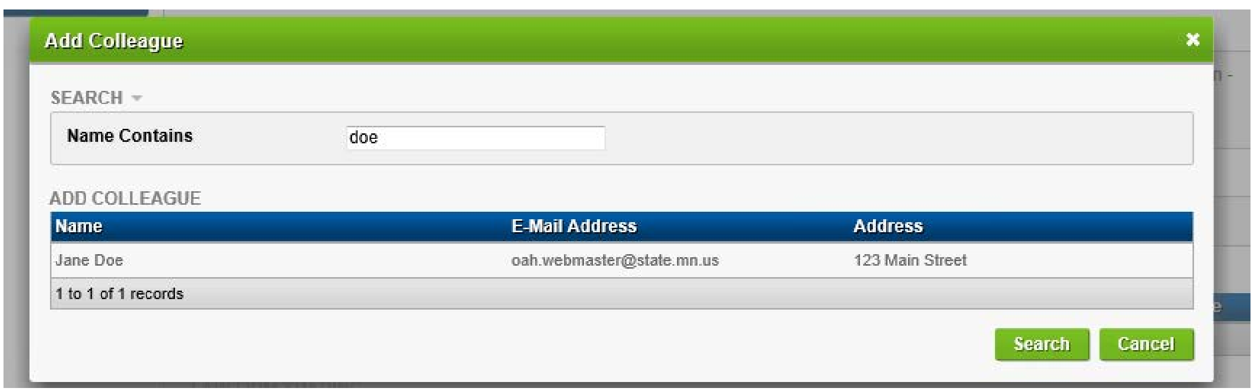


Image: Add Colleague window – search results

5. Click the colleague with whom you want to share the matter.

What happens next? You return to the **Law Firm View** screen. The colleague you selected appears in the **Law Firm Sharing** display table.

Image: Law Firm View screen - Colleague added

6. Repeat steps 1 through 4 to share this matter with additional colleagues.

> ➢ **NOTE**: Click the **X** at the far right of any line item in the **Law Firm Sharing** table to remove a colleauge's permission to access the case.