ADDING ATTORNEY ADDRESS RECORDS

To add a new attorney to your system, you'll need to navigate to Technical/Case Management Tables/Edit Attorneys. From there, go to the File menu to add a new attorney. The fields are fairly straight-forward, so only a few extra notes are provided below.

SSN and FEIN: These fields are optional, but quite helpful when it comes time to send 1099 forms to attorneys who have received their fees from bond money.

Group ID: This field is reserved for future use.

Electronic service: Counties that were grandfathered in with Judici EFiling use this field to indicate that an attorney only receives e-service for e-filings, or wants to receive e-service for e-filings and court notices such as notices of a hearing, or notice of a docket entry. For counties that never used Judici EFiling, e-service for e-filings will be handled by EFileIL, so the only important thing to note here is whether the attorney wants to receive other court notices electronically. If they do, then choose **Notices**. If they don't, choose **None**.

EFiling Pay-Down Account: This option is only used by counties that were grandfathered in with Judici EFiling. The Add Pay-Down button enables an attorney to pre-pay for their e-filings, so they aren't subject to credit card fees when it comes time to pay for each filing.

Last PD Appt: In counties where private attorneys are rotated to serve as Public Defender, this date field tracks the last date that attorney was assigned to a defendant as a PD. This date is linked to the Next PD button in the Edit Case screen, which reaches out to your attorney address file and pulls the name of the next attorney who is in line to serve as PD.

Active: If an attorney is no longer Active, uncheck the Active checkbox. With the attorney marked as inactive, users who attempt to put that attorney on a case will receive a warning message.

FIXING UP YOUR ATTORNEY ADDRESS RECORDS TO PREPARE FOR E-FILING

For counties preparing to begin e-filing, it will be important to get the registration numbers in your Attorney Address records fixed to the correct registration numbers. To do this you'll need to use the following steps:

1. First, in the Edit Attorney screen, use the File/New Attorney option to add the attorney's address record under the correct registration number.

2. Once you're done adding the new address record, search for that attorney by name using the Name tab of the Edit Attorneys screen. Right-click on the incorrect registration number and choose Change Regis.
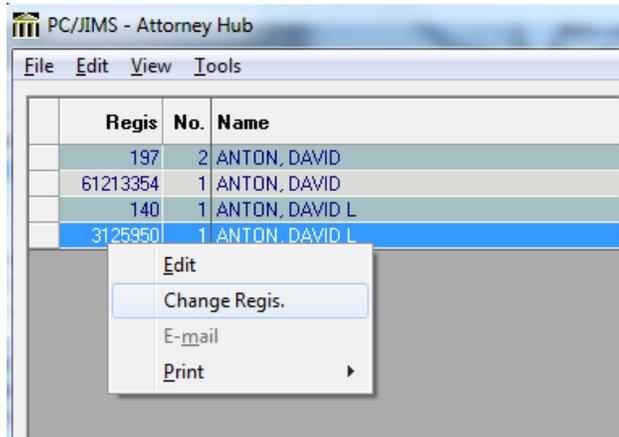

Note that you will need to do this for each and every one of the incorrect address records you have for that attorney--and sometimes, as in this picture, you will see several.

The Change Attorney Registration screen reaches out to your case data and searches for any cases that have that registration number associated with an attorney on a case. In the picture below, we are converting attorney registration number 197, and you see multiple attorney names have been associated with that number.

This happens if, at any time in the past, a user changed the name on the attorney address record for that registration number. So in the picture above, attorney registration number 197 was used for the name ANTON, DAVID in 1 case (the Count column represents the number of times it locates that registration number and name in a case) and for the name HOPKINS, JOHN J in two cases. If this happens when you are fixing attorney records, you will either want to convert the cases with the other name to a better attorney address record for that attorney, or leave them alone if you don't find a better attorney address record for that attorney.

3. In the New Name field, type that attorney's name again. After you have enough of it, hit the drop-down arrow and you'll see both the old record, with the incorrect registration number, and the new record with the correct number. Click on the new record.   You should see that it puts the new registration number in the Change Attorney Registration screen, as well as the attorney's name, as you can see in the picture here:
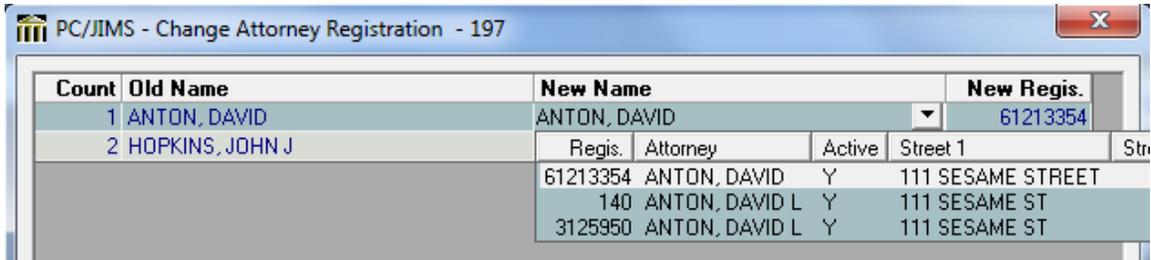

4. If your screen is showing another attorney associated with that same registration number, search for a new address record for that attorney also--one that seems to be associated with a real registration number.
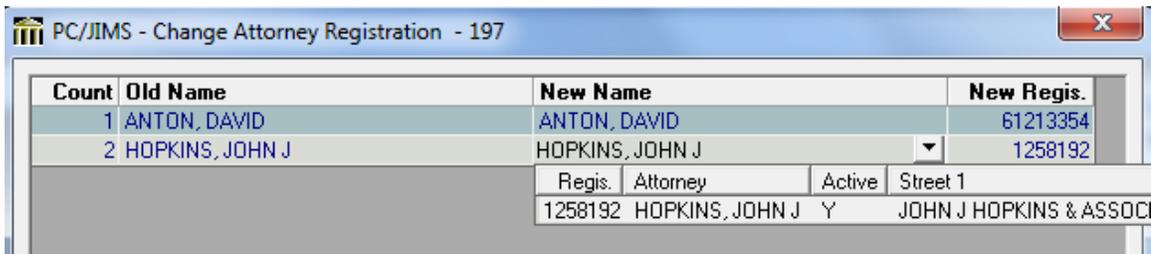
If you don't find one, you can simply leave those records unconverted.

5. If you have assigned a more correct attorney address record to each row, you'll see that the checkbox at the bottom of the screen becomes enabled. Doing this will ensure that the attorney address records you are converting are deleted after they are converted to the correct number, leaving your users with only one option for those attorneys, instead of two or more. So, when that checkbox opens up, it means you're converting all of the cases that have that old registration number, and there is no need to keep the attorney address record for that registration number. Checkmark the Delete Attorney Record option, and then hit Save. *(Note that if you aren't converting each row in the screen, this won't be an option, but you can still hit Save.)*
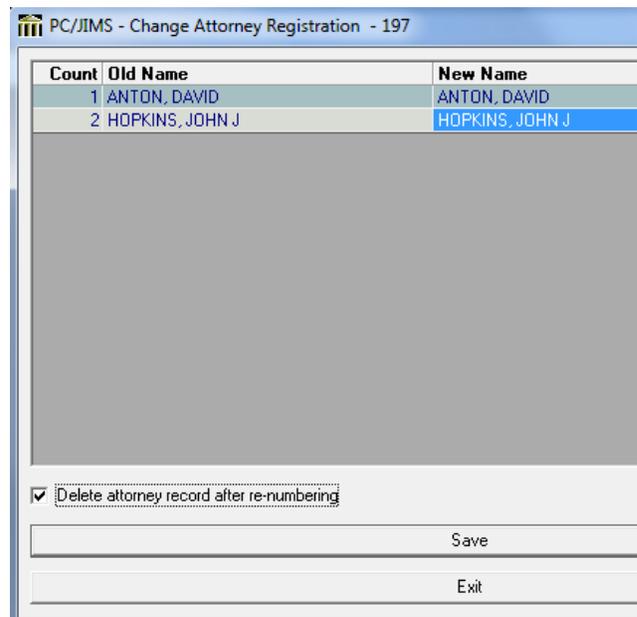

6. If you had multiple attorney address records for that same attorney name, repeat steps 2-5 until you have dealt with each one of them.

FIXING CASES THAT HAVE A FIRM NAME AS THE ATTORNEY

One of the other ways in which your county's prior practices could affect e-filing is if a firm name was ever used in place of an actual attorney name in the Attorney Address screen.   In some counties, rather than identifying a specific attorney who represented a litigant, they would occasionally create an attorney address record for the firm. They would then put the firm on the case as the attorney, instead of the actual attorney. This is now unacceptable, for a variety of reasons:

- Per the state's electronic access policy for court records, Judici can't show the online case file to just any attorney... only the attorney of record
- All e-filings have to be associated with a specific attorney.
- Electronic service has to be done to a specific attorney, or a specific person they designate. And the EFM asks the CMS which specific attorneys should get service.
- The AOIC has advised that attorneys can run into trouble when their client thinks they're be represented by one attorney, and another attorney jumps in without officially being recognized by the client and court.

To fix records with are really firms rather than attorneys, firm names will have to be replaced with an attorney names. To determine whether your county had this practice, you'll want to run a list of the attorneys in your system and identify those that were entered under the firm name first. That list is run from here:
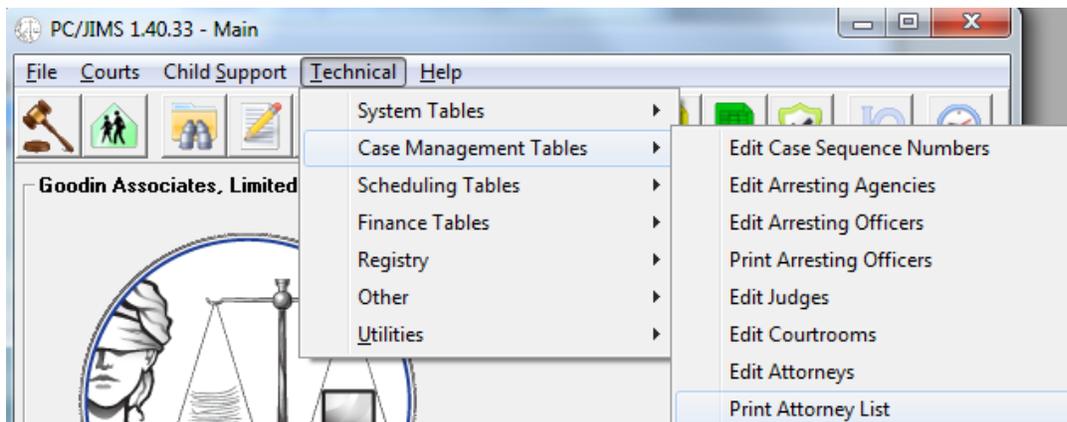
The parameters for the report are easy--simply choose the Sort you want (probably NAME) and click Run.

The report will look like this:

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3/01/17 12:40:01  GAL/JIMS 8.0   LAWRPTSQL           ATTORNEY ADDRESSES                GAL/353-950927 GAL  PAGE    1

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SORT BY: *NAME      PRINT SSN: *NO
--------------------------------------------------------------------------------------------------------------------
REGIS NO.  NAME                               ADDRESS                        PHONE / E-MAIL      FAX NUMBER
--------------------------------------------------------------------------------------------------------------------
006238958  ABBOTT, MARNY JOY                  WELTMAN WEINBERG & REIS        312/782-9676        312/782-4201
                                              180 N LASALLE ST  STE 2400
                                              CHICAGO           IL  60601-0000
006271833  ABEL, GREGORY D                    HAUSMANN-MCNALLY SC            217/424-8833        217/424-8855
                                              132 S WATER ST  SUITE 529
                                              DECATUR           IL  62523-0000
006677450  ABELL, JOHN                        ATTY AT LAW                    618/667-7450        618/667-9866
                                              PO BOX 321
                                              TROY              IL  62294-0000  kg2881@aol.com
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Now, to identify those that were entered under the firm name, glance down the Name column and highlight any names of law firms that you see.

Once you've identified those address records that were entered under the firm name, it's time to identify the pending cases that have that firm name in them. To do this, you'll need to run an Attorney Caseload report for that attorney registration number. Navigate to Courts/Case Management/Reports/General/Attorney Caseload to run those reports.

Fill out the parameters, choosing to select by registration number, and supply the registration number in the field provided.

For Case Status, choose *PENDING.

For Attorney capacity, choose *ALL.

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Run this caseload report to find the pending cases that have the firm representing a litigant--these are the cases in your system that need to be fixed. Each case on the report will need to be updated to reflect the actual attorney who is representing the litigant. How that is determined depends on your office's usual procedures, but typically the attorney of record is noted on the record sheet. Still, if you can't find it there, you might need to look at the file (complaint, answer, entry etc)... which may even indicate multiple attorneys. Unfortunately, there is no easier way.

Once you've determined the specific attorney, replace the firm name on the case with the name of the actual attorney. If that attorney isn't in your attorney address file, you'll need to add that attorney address record first.