

ID	Description	Category	Source	Recommended Priority	LOE	Notes	Focus	Impacts?	Tyler Comments
2	Provide the ability for a court admin user to see the Review History of other court staff	Administration	Supreme Court Appellate Courts	1		To allow the ability to view the reviewing party from within the user interface. This would allow supervisors to find out who reviewed specific filings, on-demand, without having to wait for the Operations report to come out.	Op. Efficiency		
58	Error queue - once resolved by TYL support, back to court for processing.	Administration	Harris DC	1		Currently, when TYL support is required to resolve a filing in the error queue, TYL support accepts the doc and the file stamp shows with the support person's username. It needs to go back into the court error queue for processing by the court.	Op. Efficiency		
6	Civil Case Information Sheet	Filing	Bexar DC Denton DC/CC Collin DC/CC Dallas DC/CC Travis DC Bell DC/CC Brazoria DC El Paso DC/CC Tom Green DC Williamson DC	1	Medium	The Civil Case Information Sheet is a state mandated cover sheet that must act as the cover sheet on each electronic filing within the state. The electronic Case Information sheet has recently been revised and the revised copy has been made effective on 3/1/13. This request is to have the system automatically add this as part of each submittal and fill out the appropriate fields based on the information provided in order to prevent the attorneys from this added step. To add to this request, the initial court stamp will need to go on the actual document, not the cover sheet.	Op. Efficiency	EFSP	3.8
55	In the FreeFax system today, the attorney has the ability to specify specific fields for services. These fields match up with our traditional service tracking fields in Odyssey and include things like: • Party to Serve • Service Type (citation, writ, etc.) • Service Method (by person, by publication, by posting, etc.)	Filing	Harris DC	1			Op. Efficiency	EFSP	
81	Preview PDF	Filing	Harris DC	1		Requested the enhancement to be able to preview their uploaded PDF, prior to submitting.	Op. Efficiency		
92	Quantity default value, allow for 4 digit quantities	Filing	Potter DC	1		Make the default quantity 1 - allow for up to 4 digits as a valid quantity (copy charges per page)	Op. Efficiency	EFSP CMS	3.8/HTML5
66	Financial Report Additions	Reporting	Tarrant CC Dallas DC/CC Collin DC/CC Travis DC	1		Financial Report add: Case Category Name of party being charged in a filing EFSP associated with the transaction	Op. Efficiency		3.8
5	Support capturing the Reviewers User ID from OFS to be sent to the CMS so that there is an audit trail for who accepted filings.	Review	Ft Bend CC Collin DC/CC	1	Medium		Op. Efficiency		
45	EFSP Indicator to Clerk	Review	Supreme Court Denton DC	1		On clerk review screen, add indicator as to the EFSP that submitted the document	Op. Efficiency		
49	Increase comment box size	Review	Appellate Courts	1		For accepting/rejecting and other comments, increase the size of the box from one line to three lines	Op. Efficiency		3.8 / HTML5
50	Alert when a filing is sent to the error queue	Review	Collin DC/CC	1			Op. Efficiency		
65	Display assessed fees for a Waiver	Review		1		Display assessed fees for a Waiver and indicate that a waiver is used (close to where the fee)	Op. Efficiency		
72	Change payment amount	Review	Travis DC	1		The ability to change any payment amount from the original amount to the amount of their choice, during review.	Op. Efficiency		
76	Insufficient funds message	Review	Travis DC	1		Display the insufficient funds message when upon completion of the edit process of the filing, prior to acceptance as opposed to after the filing is accepted by the reviewer.	Op. Efficiency		
82	Filing tab change	Review	Supreme Court	1		The would like to see the user who accepted and rejected the filing and have this information listed on the Filings tab.	Op. Efficiency		
85	Search reviewer's name	Review	Supreme Court	1		They would like the ability to search filings by the reviewer's name.	Op. Efficiency		
86	Notification request	Review	Travis DC	1		Can't get case information. If the electronic filings haven't been reviewed/accepted yet, they are wanting to know that something has actually been filed.	Op. Efficiency		
95	Documents with security should not be getting through	Review	Supreme Court Appellate Courts Harris DC Travis DC	1			Op. Efficiency		3.8
96	File Stamp: Automatic conformance to rules.	Review	Supreme Court	1		If a document is filed on Sat, Sun, or holiday, the file stamp should be 8:00AM the next business day. System currently stamps submission time.	Rules Based Change		3.8
7	Allow Admin accounts to access more than one firm/court	Administration	Tarrant DC/CC Collin DC/CC Denton DC/CC	2		Ability to have a single user account for each member of their IT team and/or Audit personnel that will have access to all courts in their organization. Currently a user account can only be associated with one court. Getting around this now by using multiple accounts/email addresses for each user to access the different courts. However, this presents a problem in that the email addresses are not actually valid.	Op. Efficiency		
8	Allow courts to edit their configuration via the UI	Administration	All	2	Xlarge	Business Case: Update user rights due to promotion or retirement; modify queues due to change in business process.	Op. Efficiency	EFSP	
10	Make the UI Configuration Configurable Per Node	Administration	Harris DC	2	Large	* There are certain contextual help that Harris county would like to display that will assist their filers, however if we display this information for Harris, then the same information will be displayed for the entire state. * We currently only have the ability to configure the UI at a global level instead of at a node level.	Op. Efficiency	EFSP	HTML5
46	The ability for a Court Admin(or another Role to modify queues that are only available to their specific Nodes.	Administration	Denton DC	2			Op. Efficiency		
94	Verify that administrators can only access queues in their nodes.	Administration	Harris DC	2			Op. Efficiency		

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18	Require Parties tied to Filing Code	Filing	Harris DC	2	Medium	Ability to base the party requirements off of the filing code instead of the case type. They are attempting to prevent filers from forgetting to add additional parties when they select a certain filing code.	Op. Efficiency	EFSP	
19	Ability to search the Filing Code List	Filing	Dallas DC	2		Ability to search the filing code table when creating a new filing. Preferably the ability to launch a search box much like the "F4" option in some systems. Or the ability to type and filter the list of available codes	Op. Efficiency		
20	Expand Matching Fields & Add Additional Required Fields	Filing	Williamson DC	2		Require Address, Drivers Licenses, Date of Birth or Social on certain filings, which are generally included in the cover sheet.	Op. Efficiency	EFSP	
47	Additional Party Information - DOB/DOD	Filing	Dallas CC	2		Allow for the entry of date of birth and date of death on party information.	Op. Efficiency	EFSP CMS	
48	Text change on UI - COAs would like to replace text 'Courtesy Copies' with 'Additional Notification Recipient'	Filing	Appellate Courts	2			Op. Efficiency		
54	Format the display of fee multiplier when large qty is selected	Filing	Comal DC	2		Currently the filer is presented with an item by item breakdown of any multiple of an optional services they select. (Fee Multiplier). This becomes tough to read if the filer requests a quantity of 10 or more (i.e., 100 copies) Request a summary of the Fee Multiplier be shown such as "(100 X 1.00)"	Op. Efficiency		
73	Court location	Filing	OAG	2		Display the court filing location for each envelope. Where it was filed on filing tab reviewer queue and review history.	Op. Efficiency		
75	EFSP insufficient funds message	Filing	Travis DC	2		Travis County would like all EFSPs to display a message that states that insufficient fund transactions may be rejected and that it is the filer's responsibility to ensure that they have sufficient funds when making transactions via credit card.	Op. Efficiency	EFSP	
80	Pop Up Window for filer	Filing		2		Have a pop up window when a filer tries to submit a filing on an Amex card in a county/court that does not accept American Express, that explains that they will need to provide another payment option. Or eliminate AMEX as a payment option in counties that do not accept it.	Op. Efficiency	EFSP	
51	Add Reviewer name to the financial reports.	Reporting	Dallas DC/CC Tarrant DC/CC	2			Op. Efficiency		3.8
59	Add Card Type to the financial reports.	Reporting	Bell DC	2		Needed to assist with reconciliation. Add the card type used so that accounting can investigate if needed.	Op. Efficiency		3.8?
91	Metric request for clerk time	Reporting	Dallas DC/CC Tarrant DC/CC Collin DC/CC	2		Metrics on duration of time clerk is in a filing. Provide details on financial report.	Op. Efficiency		
21	File Stamp: Option to use reviewer initials	Review	Denton DC/CC Bell DC/CC Collin DC/CC Brazoria DC/CC	2		Several counties have asked about inserting initials to the stamp options. Currently you have to create a stamp per user, there should be an option to parse the First name, last name fields and be able to create an initials stamp.	Op. Efficiency		
22	Add sort options to Review queues	Review	Harris DC	2	Small		Op. Efficiency		
23	Add prompt to alert user and void inadvertent exit from review screen e.g., "Warning, you are about to exit the filing. Do you wish to continue?"	Review	Ft. Bend CC	2			Op. Efficiency		
24	Add reviewer comments to the filing Details screen (Review History -> Case Details) as well as the corresponding print out (Review History -> Case Details -> Print Preview)	Review	Ft Bend DC/CC	2			Op. Efficiency		
25	Search / filter for the clerk needs to have an option, for expediting requests a. To search by Firm b. To search by attorney or bar number c. Search by firm description d. Search by firm reference	Review	Supreme Court Appellate Courts Harris DC	2			Op. Efficiency		
26	Include the name of the reviewer within the filing details screen	Review	Dallas DC/CC	2			Op. Efficiency	EFSP	
27	Retain annotations added to a document by a reviewer on rejected filings and pass the annotated document to the filer	Review		2			Op. Efficiency	EFSP	
61	Case Number needed on manually accepted eFilings	Review	El Paso DC/CC Travis DC	2		The case number entered by the clerks office needs to appear on the filings when accepted.	Op. Efficiency		
62	Format Queues Display - Add Item Counts	Review	Harris DC Travis DC	2		Add item county's on the queue display page to indicate the number of items in the queue (like outlook does with unread email)	Op. Efficiency		
63	Review Queue - Case Type Filter update	Review	Harris DC	2		Restrict the review queue filters to the case types used in that node (not globally)	Op. Efficiency		
64	On summary screen add Court subtotal.	Review	All	2		On Summary screen add Court only subtotal on list of charges. Not able to see a total for the fees that the court are due. This has to manually be added up separately. Their clerks have to manually key in information, and they don't want them to have to calculate for a total in their head, or on a calculator.	Op. Efficiency		
69	Show reviewer's name	Review	Collin DC/CC	2		Show reviewer's name when rejecting (workaround now is clerk enters initials or name in comment) and add it to the filing details.	Op. Efficiency	EFSP	
71	Increase Business Name size	Review	Harris DC	2		Increase available characters for Business Name (increase from 80 - 300)	Op. Efficiency		

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77	Manually lock envelope	Review	Supreme Court	2		The ability to manually lock an envelope to prevent other clerks from working that item. They would like the envelope to automatically lock when the first user enters it and require that user or a user with administrative authority to unlock the envelope. They would also like the ability for other users to enter that envelope while it is in a locked state but prevent the user from editing/working the envelope while it is locked.	Op. Efficiency		
78	Reviewer for envelope	Review	Supreme Court	2		The ability to see the last reviewer that was in the envelope. (i.e. Persist the reviewer label on the Review Queue screen)	Op. Efficiency		
84	Search filters	Review	Supreme Court	2		They would like the ability to have their search filters persist on the filings tab. This would prevent them from having to update them each time they go into this screen.	Op. Efficiency		
88	Limit filename size	Review	Appellate Courts	2		For SFTP - to limit the length of filenames in the zip	Op. Efficiency		
89	Attach a document	Review	Tarrant, Dallas, Collin	2		Add the ability to attach a document to a rejection Name of party being charged in a filing.	Op. Efficiency	EFSP	
93	Filing Details Screen - Wrap filer comments	Review	Supreme Court Appellate Courts Travis DC	2		Wrap the filer comments so that the entire comment can be seen on the reviewer page.	Op. Efficiency		
87	Payment code Request		Bexar	2		They are looking for the CMS Fee code. Currently they have their "payment code" set as the CMS Fee Code. For Ex. An Original Petition - 232.00 - CMS Fee Code - 3070. They want to receive the CMS Fee Code - 3070.	Op. Efficiency		Corrected with local code configuration solution provided by OCA
29	Changes to the Party Address Fields	Filing	Harris DC	3		Harris DC would like the following items changed: The ability to add additional mailing address. A field where a SPN# would be entered in. The SPN# is used when sending mail to an inmate they do come across this on a frequent basis. Fields needed to send a military member mail.	Op. Efficiency	EFSP	
30	Increase to Name Field	Filing	Harris DC	3		Harris DC would like the combined length of the name fields to be increased to 300 characters.	Op. Efficiency		
32	Create State/Court specific data entry fields for filers to provide information such as the items on the Civil information sheet and local items such as "Will you be presenting the original will for Probate? Yes ____ No ____"	Filing	Ft. Bend CC	3			Op. Efficiency	EFSP	
60	Case Search - search base case numbers	Filing	All	3		When searching for a case numbers, allow for zeroes, dashes and other format characters, rather than requiring the case number be exactly the same as appears in the CMS.	Op. Efficiency	CMS	
67	Multiplier box	Filing	Potter DC	3		When the Fee multiplier box appears, keyboard focus should be on the quantity box without having to click in the box to give it focus.	Op. Efficiency		
68	Efile site link	Filing	Harris DC	3		Efile Site Link in Activation Email User has asked that activation email, sent after registering, contain a link to the e-filing site. The user, from the Harris Co. DA's office, said she was confused as to where to go after getting the activation notice and that the link would have helped.	Op. Efficiency	EFSP	3.8
74	Undeliverable Mail	Filing	Bexar DC	3		To add more information to undeliverable mail notification. See below: It is good to get the undeliverable notification, though since most of the fields are empty, I'm not sure it is adequate. I'd like to recommend the development team look into incorporating more information, such as envelope number, parties, etc.	Op. Efficiency		3.8
33	Print operational reports on-demand	Reporting	All	3	Medium	ex. Filing/reviewing statistics per court user for a date range. This is currently generated automatically and submitted to the court daily via e-mail	Op. Efficiency		
43	Add a "Total" line to the financial reports.	Reporting	Brazos DC	3			Op. Efficiency		
35	Alert Reviewer when case is created in the CMS	Review	Collin DC/CC	3		Alerts for when cases are finalized and created successfully in CMS (i.e. When the integration of an action is complete and the messages are sent/received successfully). When a reviewer accepts a case, it goes to the CMS and begins developing the case. The case is not finalized for a few minutes until the integration is complete. The customer would like a notification (i.e. a badge like apple has) on the review queue to let them know that the case has been created fully and that they can go into it to complete further/subsequent actions within the CMS. Potentially return reviewer back to queue and they can see status update on auto refresh.	Op. Efficiency		
36	Ability to Default Comments with Default Rejection Reasons	Review	Denton DC/CC	3		Workaround - Rejection Codes are configurable to set up a reason code. Denton District Clerk would like the functionality for a default comment to be entered in the rejection comments box when a rejection reason is selected by a reviewer in the review queue.	Op. Efficiency		
38	Would like AUTO stamps to have the ability to support images (i.e. seals)	Review	Ft Bend CC	3			Op. Efficiency		
38	Court location stamp that solely displays the court number	Review	Ft Bend CC Dallas DC/CC	3			Op. Efficiency		

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39	After accepting an e-filing, both DC and CC would like to take the reviewer back to the review queue instead of automatically pull up the next e-filing document to be reviewed. Users would also like a shorter path to print the filing receipt of the accepted filing upon returning to the review queue.	Review	Ft Bend DC/CC	3			Op. Efficiency		
40	Add description of rejected Filing Code to body of rejection e-mail (new token needed from dev.)	Review	Ft Bend DC/CC	3			Op. Efficiency		
42	Hide "Convenience Fee" on clerk review screens	Review	Bell DC	3		Eliminate convenience fee from clerk review screen to reduce the possibility of a clerk thinking that it's a court fee.	Op. Efficiency		
44	Notifications of new filings	Review		3		An option to send an email alert to clerk staff that a new filing is there to be reviewed (small county use)	Op. Efficiency		
53	Default to review queue logged in as reviewer	Review	Cass DC	3		Since courts are configured as both filers and reviewers, the request is to automatically default to the review queue for courts.	Op. Efficiency		
70	Rejection comment box	Review	Supreme Court	3		Improved Copy/Paste Into Rejection Comments Box - Initial client request went to only being able to copy into clerk review rejection comments box using 'Ctrl C/Ctrl V'; now client is complaining that hard returns or breaks in text do not paste properly	Op. Efficiency		
83	Use Hot keys for dates	Review	Supreme Court	3		They would like the ability to hot key dates in the date filters. For example (t=today, tom=tomorrow, y=yesterday, t+4=4 days from now, etc.). This would allow them to keep their filters set to the current day's filings.	Op. Efficiency		
90	Add court location	Review	Dallas DC/CC Tarrant DC/CC Collin DC/CC	3		Add court location filter to the review queue	Op. Efficiency		
79	Waiver options		All	3		Currently each of the waiver options (no assessment, assessment and credit, assessment and no credit) can only be setup once per node/location in the system. County offices handle multiple case types and each be handled differently. The request would be to allow the multiple waiver options to be available at the same location.	Op. Efficiency	CMS	
97	Case Search on EFSP and EFM to validate county is selected when searching for a case.	Filing	Harris DC	3		When doing a quick search on a case number to file into the case, the state EFSP and the EFM allows the search to be performed without the county select which causes an error. If you select the correct county then the search works. Need to validate the county is selected before performing the search	Op. Efficiency		
99	Optional Services - service	Filing	Bexar DC	1		Should have ability to indicate services (process) by an indicator next to the litigant name. This is where you should be able to select type of service	Op. Efficiency		
98	Needing a way to mark a filing as Waived when the filer pays for the filing	Review	Harris DC	3		Up for Discussion - We would like to see if the filer chooses a filing code (like protective order) that the fees are waived when filing and if the filer pays with credit card - reviewer allowed to change to a waiver to not charge the filer for the filing	Op. Efficiency		
100	Strip illegal characters from filenames	Review	Bexar-DC			Have the EFM strip special characters not allowed by Windows OS from the filenames prior to sending over to the court via FTP	Op. Efficiency		Completed
101	Alert needed for missing case number	Review	Bexar DC	1		If the reviewer fails to put the case number in the Edit Box you should not be able to proceed	Op. Efficiency		
102	Force the filer to say who is responsible for the fees	Review	Bexar-DC			If the filer does not indicate who the responsible party is for the fees the reviewer has to fill in the information	Op. Efficiency		Completed
103	Validate PDF prior to entry into eFileTexas	Filing	Supreme Court Appellate Courts Travis-DC	1		If the filer attempts to send something for clerk review, ensure that it can be fully processed prior to presenting to the clerk for review. Several times documents are accepted, go to the error queue where the court is instructed to return the document because of a technical error.			DUP of #95
104	Financial Report: Separate AMEX report	Reporting	Travis DC			Due to the timing of fund delivery between V/MC and AMEX we need a separate financial report for AMEX transactions			
105	Disallow multiple initial case filings inside of one envelope	Review	Harris DC	2		Via the back button and other methods, filers can file initiating documents for multiple cases inside one envelope. The request is to not allow this.			
106	File Stamp: Restrict movement of Judicial Stamps	Review	Hidalgo DC/CC			Once a judge places a signature stamp on a document, clerk and court staff should not be able to move it.			
107	File Stamp: Justify reviewer name	Review		1		Justify the reviewer name in the stamp so that the person's name (especially someone with a long name) will fit in the stamp area. Currently it runs off the page.			
108	Filer portal: Use the filing type code as the description	Filing	All	1		For the filer portal, the description field is pre-populated with the file name. It should be pre-populated with the filing type description instead.			
109	Sealed Cases: Indicator from the CMS	Filing	Harris DC	1		Currently, when EFM requests info on a sealed case, the CMS is returning an error. The EFM should be modified to allow the CMS to return a code to indicate that the case is sealed (or similar situation)			3.8
110	Sealed Cases: Removal from the EFM	Filing	Harris DC	1		If a case was once available on through eFiling but becomes sealed at a later date, the EFM still returns case information even though the CMS returns an error indicator (indicating the case is sealed).			
111	Errored Filing Report	Reporting	Dallas DC/CC			Need a daily report to show what came in and was resolved from the error queue			
112	Comments for Manual Acceptance	Review	Tarrant DC			Need a comment field to pass back comments to filer upon manual acceptance.			
113	Add Global Payment Indicator	Review	Harris DC	1		Add to all applicable review screens an indicator that the filer is using a Global Payment Account from an EFSP.			3.8