ID	Description	Category	Source	Recommended Priority	Notes	Impacts?	Final Disposition
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.~~		**Completed**
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 CC~~	~~1~~			**Completed**
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~~	~~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.~~	~~EFSP~~	**Completed**
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.		**Included in eFile 2 (Req. 3770)**
8	Allow courts to edit their configuration via the UI	Administration	All	2	Business Case: Update user rights due to promotion or retirement; modify queues due to change in business process.	EFSP	**Included in eFile 2 (Multiple Requirements)**
10	Make the UI Configuration Configurable Per Node	Administration	Harris DC	2	* 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.	EFSP	**Included in eFile 2 (Req. 5340)**
18	Require Parties tied to Filing Code	Filing	Harris DC	2	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.	EFSP	**On roadmap**
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~~		**Completed**
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.	EFSP	**On roadmap**
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 a option to parse the First name, last name fields and be able to create an initials stamp.~~		**Completed**
22	Add sort options to Review queues	Review	Harris DC	2			**Included in eFile 2 (Req. 740, 750, 760)**
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			**On roadmap**
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~~			**Completed**
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 be firm description d. Search by firm reference	Review	Supreme Court Appellate Courts Harris DC	2			**On roadmap**
26	~~Include the name of the reviewer within the filing details screen~~	~~Review~~	~~Dallas DC/CC~~	~~2~~	~~For internal court staff, need the ability to see who is reviewing a particular envelope~~		**Completed**
27	Retain annotations added to a document by a reviewer on rejected filings and pass the annotated document to the filer	Review		2			**Included in eFile 2 (Req. 1280)**

ID	Description	Category	Source	Recommended Priority	Notes	Impacts?	Final Disposition
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 a inmate they do come across this on a frequent basis. Fields needed to send a military member mail.	EFSP	On roadmap
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.		On roadmap
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		EFSP	On roadmap
33	Print operational reports on-demand	Reporting	All	3	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		Included in eFile 2 (Multiple Requirements)
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.		Completed
38	Would like AUTO stamps to have the ability to support images (i.e. seals)	Review	Ft Bend CC	3			Completed
38	Court location stamp that solely displays the court number	Review	Ft Bend CC Dallas DC/CC	3			Completed
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			Completed
40	Add description of rejected Filing Code to body of rejection e-mail (new token needed from dev.)	Review	Ft Bend DC/CC	3			Completed
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.		On roadmap
43	Add a "Total" line to the financial reports.	Reporting	Brazos DC	3			Included in eFile 2 (Multiple Requirements)
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)		On roadmap
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		Completed
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			Included in eFile 2 (Multiple Requirements)
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.	EFSP CMS	Completed (Configurable)
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		Completed
50	Alert when a filing is sent to the error queue	Review	Collin DC/CC	1			Included in eFile 2 (Req. 930)
51	Add Reviewer name to the financial reports.	Reporting	Dallas DC/CC Tarrant DC/CC	2			Completed
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.		Completed
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)"		Completed
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		EFSP	Included in eFile 2 (Req. 1430,1450,1460)

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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.		**Completed**
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.		**Completed**
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.	CMS	**Completed**
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.		**Completed**
62	Format Queues Display - Add Item Counts	Review	Harris DC Travis DC	2	Add item count's on the queue display page to indicate the number of items in the queue (like outlook does with unread email)		**Included in eFile 2 (Req. 740,750,760)**
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)		**Included in eFile 2 (Req. 740,750,760)**
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.		**On roadmap**
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)		**On roadmap**
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		**Completed**
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.		**Completed**
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.	EFSP	**Completed**
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.	EFSP	**On roadmap**
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		**On roadmap**
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.		**Completed**
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.		**Completed**
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.	EFSP	**Communicated to EFSPs (Completed)**
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.		**Completed**
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.	CMS	**Completed**
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.	EFSP	**Completed**

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81	Preview PDF	Filing	Harris DC	1	Requested the enhancement to be able to preview their uploaded PDF, prior to submitting.		**Completed**
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.		**On roadmap**
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.		**Included in eFile 2 (Req. 740,750,760)**
85	Search reviewer's name	Review	Supreme Court	1	They would like the ability to search filings by the reviewer's name.		**On roadmap**
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.		**Completed**
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		**Completed**
88	Limit filename size	Review	Appellate Courts	2	For SFTP - to limit the length of filenames in the zip	CMS	**On roadmap**
90	Add court location	Review	Dallas DC/CC Tarrant DC/CC Collin DC/CC	3	Add court location filter to the review queue		**Included in eFile 2 (Multiple Requirements)**
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.		**Included in eFile 2 (Multiple Requirements)**
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)	EFSP CMS	**Completed**
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.		**Completed**
94	Verify that administrators can only access queues in their nodes.	Administration	Harris DC	2			**Completed**
95	Documents with security should not be getting through	Review	Supreme Court Appellate Courts Harris DC Travis DC	1			**Completed**
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.		**Completed**
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		**Completed**
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 filer pays with credit card - reviewer allowed to change to a waiver to not charge the filer for the filing		**On roadmap**
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		**Completed**
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 SFTP		**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		**Completed**
102	Force the filer to say who is responsible for the fees	Review	Bexar DC	1	If the filer does not indicate who the responsible party is for the fees the reviewer has to fill in the information		**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.		**Completed**
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		**Completed**

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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.		On roadmap
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.		Completed
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.		Completed
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)		Completed
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).		Completed
111	Errored Filing Report	Reporting	Dallas DC/CC		Need a daily report to show what came in and was resolved from the error queue		Completed
112	Comments for Manual Acceptance	Review	Tarrant DC		Need a comment field to pass back comments to filer upon manual acceptance.		On roadmap
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.		Completed
114	Ability to move whole stamp	Review	Collin DC/CC		Currently when a clerk moves a filestamp from the default location, it must be done line-by-line. Clerks office would like the entire stamp		Included in eFile 2 (Req. 1380)
116	Additional Service selections appear multiple times, consolidate dups if selected	EFM	Harris DC		If a person selects and additional service (say issue citation) and enters a quantity, then selects other services, then again selects the original service (again issue citation) with an additional quantity, the EFM doesn't combine the two issue citations into one.		Completed
118	Remove Civil Info Sheet fields from appellate nodes	Filing	COAs		The fields added to facilitate the civil case information sheet are confusing filers for the appellate courts, please remove them		Completed
119	Public Service list needs to reflect atty addy instead of bogus Tyler info	EFM	OCA		The provided XML contains the firm name and address associated with the attorneys. This list needs to be loaded as part of the daily public service list update.		On roadmap
120	Duplicate case numbers in the EFM need to be removed and blocked	EFM	Harris DC		Several case numbers are duplicated within the EFM, causing confusion to the filers by not knowing which of the dups to select. Investigate/remedy why duplicates are getting in.		On roadmap
122	Party Address Infromation should be included in the XML to courts	EFM	Harris DC		When a filer enters address information for parties, it should come over to the CMS in the XML sent.		Completed
123	EFM should reject oversized filings	EFM	Harris DC		Env 16933067 came in way oversized, the EFM needs to detect and not allow.		Completed
124	Batching expunctions to remove from the EFM	EFM	OCA				Included in eFile 2 (Multiple Requirements)