# Electronic Evidence Portal Instructions



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### **OVERVIEW**

The court will be accepting electronic evidence in specific courtrooms, as approved. Parties and attorneys are to visit the court public website <a href="www.occourts.org">www.occourts.org</a>, select *Online Services*, and *Electronic Evidence Portal* to upload evidence. **For the best experience, utilize a desktop computer and the Chrome or Microsoft Edge browser.** 

At various points during a case, when utilizing the Electronic Evidence Portal, follow the steps below.

# **STEPS**

# **Step 1: Complete the Following Steps Prior to Your Hearing**

|             | Prepare for your nearing  |  |  |
|-------------|---|--|--|
|             | Review the guidelines, if any, for the courtroom you are assigned   |  |  |
|             | Create an account in the Electronic Evidence portal   |  |  |
|             | Save your Username and password and have it on hand to access the portal when necessary   |  |  |
|             | Upload only the exhibits (evidence) that you intend to present to the court during your hearing   |  |  |
|             | <ul> <li>Steps to upload for all case types, except Civil Unlimited (identified by CU in the case number)</li> <li>on page 8</li> </ul>   |  |  |
|             | <ul> <li>Steps to upload for Civil Unlimited cases (identified by CU in the case number) on page 12</li> </ul>  |  |  |
|             | Print copies of the exhibit list and exhibit receipt for your reference   |  |  |
|             | Share your evidence with opposing parties, as necessary   |  |  |
| <u>Step</u> | 2: On Your Hearing Date   |  |  |
|             | Bring your account Username and password in case you need to access the portal in the courtroom   |  |  |
|             | Utilize the exhibit list and exhibit receipt to reference the assigned exhibit number for your evidence during the hearing  |  |  |
|             | The Court will determine who will share exhibits in the courtroom. Once the Court determines who will share exhibits in the courtroom, follow the applicable steps outlined below |  |  |

# Electronic Evidence Portal Instructions

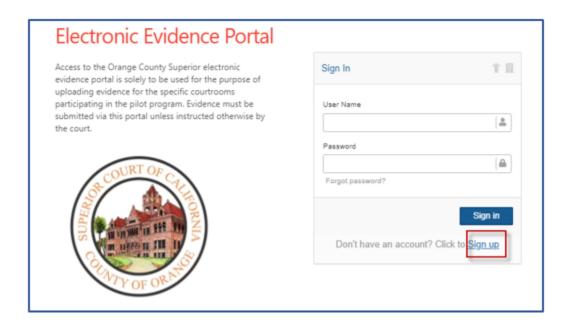


# Step 1: PRIOR TO YOUR HEARING

- □ Prepare for your hearing
- Review the guidelines, if any, for the courtroom you are assigned
- ☐ Create an account in the Electronic Evidence portal
- Save the Username and password and have it on hand to access the portal when necessary
- Upload only the exhibits
   (evidence) that you intend to
   present to the court during
   your hearing
- Print copies of the exhibit list and exhibit receipt for your reference
- ☐ Share your evidence with opposing parties, as necessary

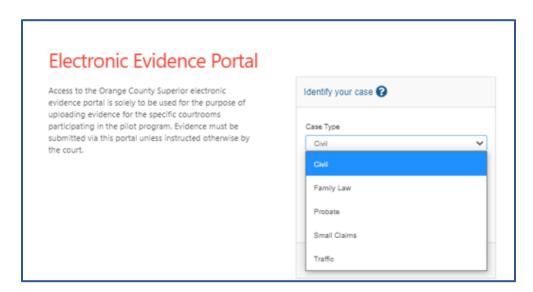
### CREATING AN ACCOUNT

1. In the web browser, select **Sign Up** to create an account.

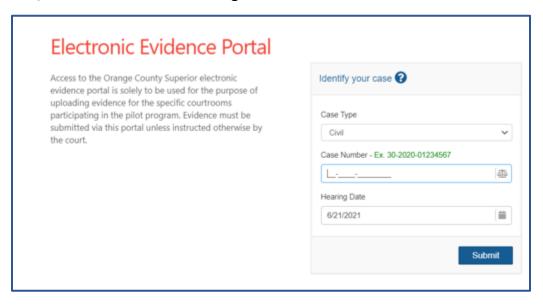


If an account has already been created, skip to step 6, and Sign in.

2. Complete the **Case Type** section by selecting the appropriate selection from the drop-down menu.



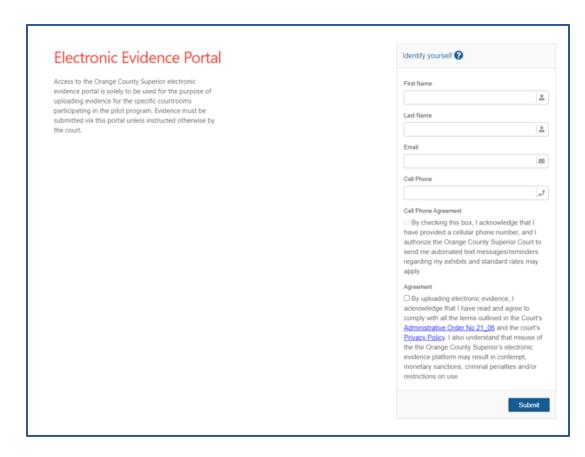
3. Complete the Case/Citation Number and Hearing Date fields. Click Submit.



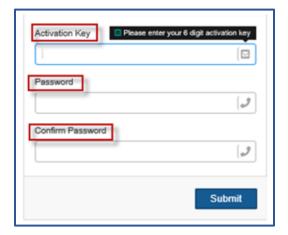


Check case initiating documents for case type, case number, and hearing dates.

 Complete the Identify yourself window (First Name, Last Name, Email or Cell Phone). Check the box under Cell Phone Agreement (if providing a cell phone) and Agreement acknowledging responsibility. Click Submit.



5. A **Verifying you are in the system** window will open and must be completed with the 6-digit activation key sent to the email or cell phone provided in step 4.





If activation key is not received via email, check the spam/junk folder.

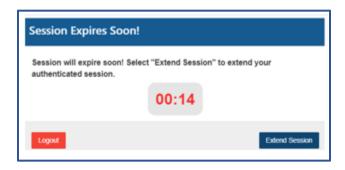
When both a cell number and email are provided, an activation key will be sent to the email address.

6. In the **Sign in** window, the **Username** should be completed with the email address used to create the account. Complete the **Password** box with the password created for the account. Click **Sign in**.



### **FXTENDING THE TIMEOUT PERIOD**

After twenty minutes of inactivity, parties will be automatically logged out of the portal. Prior to this, parties will receive a pop-up indicating the session will be expiring soon. To extend the session, select **Extend Session** or the **Logout** button if you wish to log out.



### **NAVIGATING THE SITE**

### How to Add Case/Citation

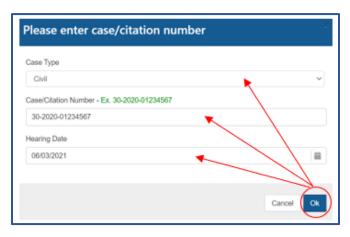
1. After logging into the website, you will land on the homepage. To begin uploading evidence, you must first click on **Add Case/Citation**.



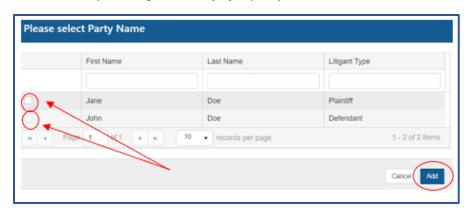


For assistance at any point, select the "?" question mark icon next to Court Hearings.

2. A prompt will appear requesting the case number/citation number. Select the **Case Type** from the drop-down menu. User must enter the **case/citation number** as listed on the case/citation initiating file document (for example: 30-2020-00123456). Select the **Hearing Date** from the calendar. Click **Ok**.



3. A list of party names will appear. Select the check box next to the appropriate party name. *Do not select the attorney or law firm name when uploading on behalf of a party*. Click **Add**.





If uploading on behalf of two or more parties (joint exhibits), select as many parties as necessary. In order for all parties to view the exhibits, exhibits will need to be shared via the **Virtual Viewing Room**. See instructions on page 18

### How to Upload Evidence

After adding the case/citation, the CASE NUMBER, HEARING DATE and HEARING TYPE will appear on the **Court Hearings** screen. After confirming the information is accurate, proceed to upload electronic evidence by clicking **Upload**.



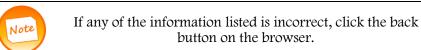
### Do's and Don'ts of Uploading

| DO   | DON'T  |
|--|--|
| Upload each exhibit individually.  | Upload an Exhibit List. The portal will generate a list during the upload process. |
| Type a description of each exhibit according to the description on the Exhibit List. | Add an exhibit number to the exhibit description, this is generated automatically. |
| Print a receipt of uploaded exhibits.  | Select the attorney's name when uploading on behalf of a party.                    |

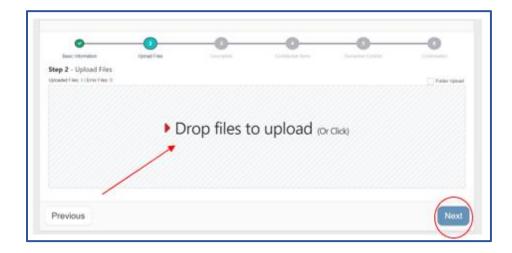
Uploading steps for all case types, except Civil Unlimited (identified by CU in the case number)

1. Step 1 – Basic Information. Confirm the Case Number, Hearing, and Party Name. Click Next.





**Step 2 – Upload files**. Drag and drop the necessary files or open the necessary folder on the user's device and select the appropriate files. When all the necessary files have been selected, click **Next**.



If an exhibit was uploaded in error, click on the red x on the exhibit to remove from the upload window.



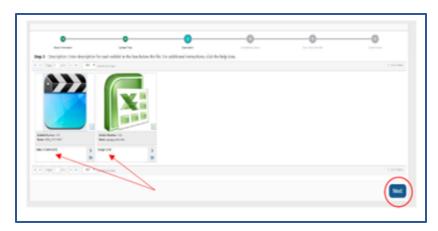
A pop-up will appear as shown below. Click **OK** if exhibit should be deleted or **Cancel** if the red x was selected by mistake and there is no need to delete the exhibit.





To avoid interruptions during the upload process, select all the necessary exhibits to upload at once. Once **Next** is clicked, additional exhibits may not be uploaded until this set has completed Step 6. Exhibits will be automatically numbered in the order they are uploaded. Exhibits in this set may be rearranged into the desired order when Step 5 is reached. **Exhibits will not be considered uploaded until** clicking "Finish" in step 6.

3. **Step 3 – Description**. After files have been uploaded, type in a unique description for each exhibit in the space available under each image. This description should accurately identify the exhibit. It will be used by you during the hearing to identify exhibits you wish to present to the court. It will also be used by the portal to generate an **Exhibit List** to be used during the hearing. When complete, click **Next**.



4. **Step 4** - To mark an exhibit(s) confidential/graphic, click on the appropriate exhibit. Once a green checkmark appears over the image, click **Next.** The image will be replaced with a manila folder marked "Confidential" after the upload process is finalized.



5. **Step 5** - To renumber exhibits, drag and drop them to the desired location. Exhibit numbers will not appear until the confirmation page (the next step). When exhibits are in the desired order, click **Next**.



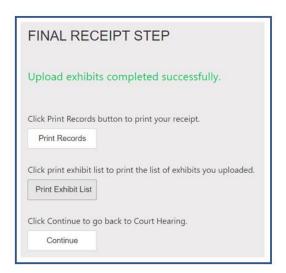
6. **Step 6 - Confirmation**. Verify the exhibit number, description, and confidential status are accurate. If corrections are necessary, click on the **Previous** button to update information. If satisfied with the exhibits, click **Finish**.





Selecting this option will prevent the user from further editing of exhibits. Ensure the upload process is <u>complete</u> with the desired exhibits, numbers, order, and description, prior to completing finish.

7. **Final Receipt Step.** Click **Print Records** to have a receipt of the completed upload.





It is important to print an Exhibit Receipt and Exhibit List of uploaded documents to have on hand during the hearing. The assigned exhibit number and description entered should be referenced during the hearing.

### Uploading steps for Civil Unlimited cases (identified by CU in the case number)

To upload exhibits for Civil Unlimited cases (i.e., 30-2020-0123456-CU-BC-CJC), follow the steps below:

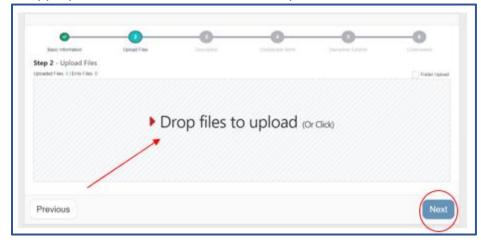
**Step 1 – Basic Information.** Confirm the Case Number, Hearing, and Party Name. Click **Next**.





If the case number, party name, or hearing are incorrect, click the back button on the browser.

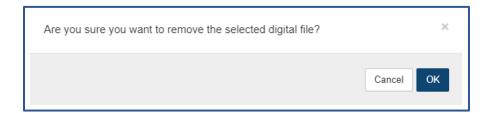
**Step 2 – Upload files**. Drag and drop the necessary files or open the necessary folder on the user's device and select the appropriate files. When all the necessary files have been selected, click **Next** 



If an exhibit was uploaded in error, click on the red x on the exhibit to remove from the upload window.



A pop-up will appear as shown below. Click **OK** if exhibit should be deleted or **Cancel** if the red x was selected by mistake and there is no need to delete the exhibit.



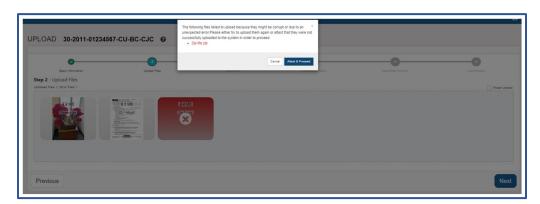


Ensure all necessary exhibits in this set have been uploaded. Once Next is clicked, additional exhibits may not be uploaded until this set has completed step 6. Exhibits will not be considered uploaded until clicking "Finish" in step 6.

Zip files are not allowed in accordance with court policy. If a user attempts to upload a zip file, the user will receive a red error on the upper right-hand corner of the screen, and a red box will be added to the uploading area.



To remove the error box, the user must select **Next** and click on **Attest & Proceed** option.



**Step 3 – Exhibit Numbers.** Type in the desired exhibit numbers to be assigned to the appropriate exhibits based off the exhibit list, and then click **Next**. Exhibit numbers will appear as four-digit numeric scheme.



**Step 4 – Description**. After files have been uploaded, type in a unique description for each exhibit in the space available under each image. Then click **Next**.



**Step 5** – To mark an exhibit(s) confidential/graphic, click on the appropriate exhibit. Once a green checkmark appears over the image, click **Next.** The image will be replaced with a manila folder marked "Confidential" after the upload process is finalized.



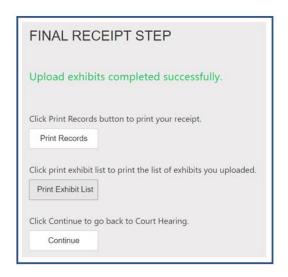
**Step 6 – Confirmation**. Verify the exhibit number, description, and confidential status are accurate. If corrections are necessary, click on the **Previous** button to update information. If satisfied with the exhibits, click **Finish**.





Selecting this option will prevent the user from further editing of exhibits. Ensure the upload process is complete with the desired exhibits, numbers, order, and description, prior to completing finish.

Final Receipt Step. Click Print Records to have a receipt of the completed upload.





It is important to print an **Exhibit Receipt** and **Exhibit List** of uploaded documents for the party to have on hand during the hearing.

### How to View Exhibits in the Case/Citation

To view all exhibits uploaded in the case, visit the **Court Hearings** screen, and click **View**.



### NAVIGATING THE ICONS IN THE GALLERY VIEW

Below is a guide to the icons in the Gallery view:



- 1. To select all exhibits, click the **solid green checkmark** icon.
- 2. To deselect exhibits, click the **outline of the green checkmark** icon.
- 3. To refresh the screen, select the **blue arrows** icon.
- 4. To generate an exhibit tag while dowloading exhibits, select the exhibit(s) and click the **file folder** icon.



- 5. To download a file, select the icons with the **green arrow** icon.
- 6. To share exhibits, select the **share** icon. For detailed instructions on this item, see page 18.
- 7. To place an **Exhibit Ribbon** on exhibits, select the **generate ribbon** icon. For detailed instructions, see page 21.
- 8. To delete a lodged exhibit, select the exhibit and click the **Delete** icon. Exhibits can be deleted up to 24 hours before the first day of hearing or original hearing date. Once the hearing has commenced and exhibits are marked and/or admitted, they cannot be deleted.
- 9. To print a receipt of all exhibits uploaded, select the **printer** icon. Bring this to the hearing for reference.
- 10. To create an exhibit list, select the paper. Bring this to the hearing to use as exhibits are presented. For detailed instructions on how to print an exhibit list, see page 18.
- 11. To view exhibits as a list rather than icons, select the icon with the **image of a list** icon. Example of the updated view shown below.



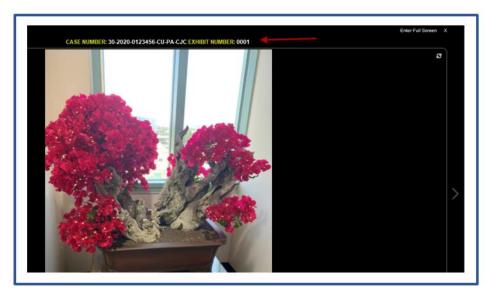
12. To view exhibits in a gallery, select the **picture** icon. Example of the updated view shown below.



13. To view an exhibit in **Full Screen**, or to watch an uploaded video, select the **Expand** icon on the exhibit. Use the rotate icon to spin the image as needed for appropriate view. Depending on the exhibit file, the icon may appear differently or in another area of the exhibit. See below.



- 14. To view additional information about the exhibit, or to play a video exhibit that has been uploaded, select the "i" icon on the exhibit.
- 15. An exhibit ribbon containing the case and exhibit numbers appears above each exhibit in the filmstrip view.



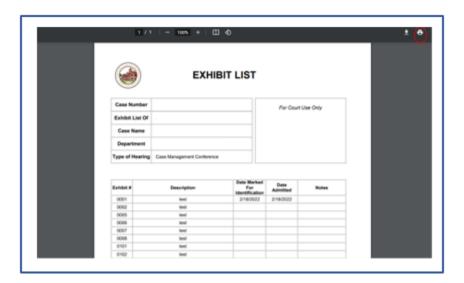
16. **Confidential** exhibits will display a file folder with the word **CONFIDENTIAL** across it. To view them, click **Ok** on the warning message. The image will remain visible until you exit the view.



### PRINTING YOUR EXHIBIT LIST

An Exhibit List can be used to reference the exhibits uploaded in your case by the assigned exhibit number. It will list all the exhibits you have uploaded. Bring this to your hearing so you can reference the exhibit number when you present your evidence to the court. To print an exhibit list, follow the steps outlined below.

- 1. Click on the Exhibit List icon.
- 2. A PDF will generate in the bottom left of your screen or will populate into a separate window.
- 3. To print, select the print icon in the window that populates.



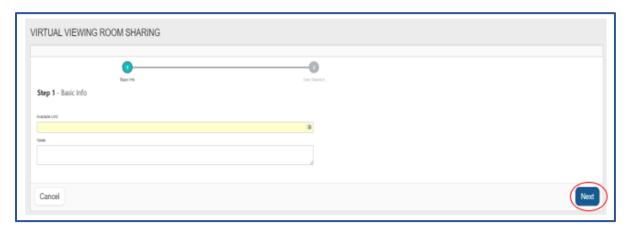
### SHARING EXHIBITS

To share electronic exhibits uploaded to the portal with other parties on your case the **Virtual Viewing Room** feature must be utilized. The First Name, Last Name, and Email address of the person(s) the exhibits will be shared with are required. If the cell phone number of the party is available as well, it may also be entered.

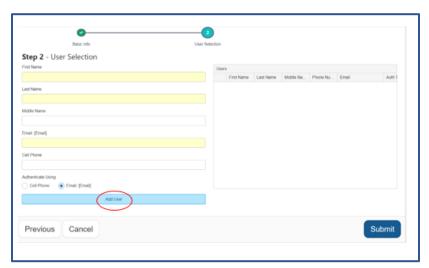
1. Navigate to the **Gallery** of the case exhibits that will be shared. Select the desired exhibits by clicking on them.



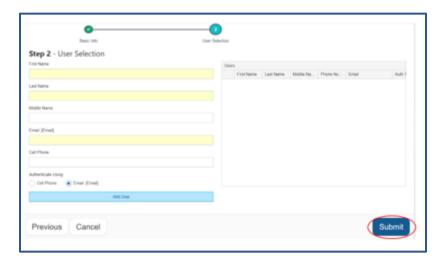
- 2. Select the **Share** icon from the toolbar.
- 3. Type in or select the last date the exhibits should be available for viewing by others. Type in any **Notes** if desired. Click **Next**.



4. Type in the **First Name**, **Last Name**, **Email** address, and **Cell Phone** number, if desired, of the party with whom the exhibits will be shared. Select the toggle button next to **Cell Phone** or **Email** under **Authenticate Using** to have the authentication pin for the party to access the exhibits, sent to either the party's email or cell phone. Click **Add User**.



5. Continue this process until all the parties the exhibits will be shared with have been added. Click **Submit**.





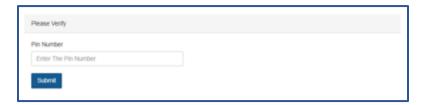
If a party is added mistakenly, or with incorrect information, select the red trash can next to their name under the Users list. Then click **Ok** to confirm it is ok to remove their information. See screenshot below.



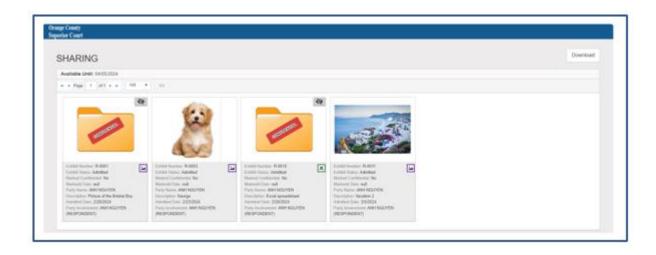
6. When the exhibits have been successfully shared, you will be directed to a **Sharing Success** page.



7. An email with a link to the **Virtual Viewing Room** will be shared with the parties whose information was entered. An authentication pin will also be sent. Parties must click the link they are sent, then enter the pin number to access the exhibits.



If the email and cell phone were entered, and the cell phone was selected to authenticate, the link to the exhibits will be sent via email, and the pin will be sent to the cell phone number. Both must be utilized to access the exhibits in the **Virtual Viewing Room**. See example of the **Virtual Viewing Room** below.



Confidential exhibits will appear in a file folder marked with the word CONFIDENTIAL. To view them, click on the **View Item** icon within the exhibit (see below).



The image will remain visible until you exit the view. Use the **Hide Item** icon to bring back the folder on the image.



# DOWNLOADING/PRINTING OF EXHIBITS/GENERATE RIBBON

If the court requests printed copies of the exhibits with the case number and exhibit number, exhibits can be printed from the portal with a ribbon generated at the top of the exhibit. To place an electronic ribbon on the exhibits that will contain the case number and exhibit number, follow the steps outlined below:

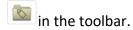
- 1. Select the exhibits that need a ribbon affixed and click the **Generate Ribbon** icon from the toolbar.
- 2. A PDF of the exhibit will populate in a new browser tab.

- 3. Verify a ribbon with the case number and exhibit number appears at the top of the exhibit.
- 4. Print the PDF or download as necessary.

### **GENERATING AN EXHIBIT TAG**

To generate an exhibit tag while downloading exhibits follow the steps outlined below:

1. From the Gallery view select the exhibit(s) that need an exhibit tag and click the Generate Exhibit Tag icon



- 2. A PDF of the exhibit(s) will populate in a new browser tab, with the exhibit tag on the first page followed by the corresponding exhibit (also containing an exhibit ribbon).
- 3. Print the PDF or download as necessary.

### HOW TO LOG OUT

There are two ways to log out of the portal.

1. Select the arrow in the upper right corner.



2. Or select the word **Logout**, on the left task bar.





# Step 2: ON THE HEARING DATE

- Bring your account Username and password in case you need to access the portal in the courtroom
- Utilize the exhibit list and exhibit receipt to reference the assigned exhibit number for your evidence during the hearing
- ☐ The Court will determine who will share exhibits in the courtroom. Once the Court determines who will share exhibits in the courtroom, follow the applicable steps

### PRESENTATION INSTRUCTIONS FOR IN PERSON HEARINGS

### Prior to the Hearing

Prior to the hearing each party or counsel in the case should have created an account, familiarized themselves with the Electronic Evidence portal, uploaded exhibits, and followed the instructions of the assigned courtroom. It is recommended that you also print the Exhibit List and exhibit receipt that note the exhibit number assigned to each exhibit. These will assist when referencing exhibits during hearings.

Prior to the start of a hearing, the court will determine who will be presenting exhibits. Follow the steps outlined below accordingly.

### Displaying and Presenting Exhibits (When a Party is Instructed to Display)

Court provided laptops are stationed on both tables located in front of the judicial officer. The laptops will allow counsel/parties to connect to the electronic evidence portal.



The court provided laptops should also be connected to the evidence presentation equipment. Contact the courtroom personnel for assistance if the laptop is not functioning.

### Evidence Presentation Equipment

Evidence presentation equipment will be present at the tables located in front of the judicial officer. This equipment needs to be connected to the court provided laptops to display exhibits in the courtroom. See below for a photo of the equipment. Prior to presenting exhibits, the projector screen will be lowered by the courtroom personnel, and will be viewable by those present in the courtroom. The witness stand may have a monitor that will also display the exhibits as presented.



Click on the **Counsel** button with the arrow pointing towards who would like to display their exhibits. If you are sitting on the right side of the table, click on **Counsel** . If you are sitting on the left side of the table, click on **Counsel**. If audio will be played from the portal over the evidence presentation equipment in the courtroom, adjust the volume by turning the volume nozzle to the right to make the sound louder, and left to lower the volume.



Clicking on the **Counsel** button will display what is currently present on the laptop screen. Ensure the items on the screen are ready to be displayed in the courtroom, as they will be viewable to everyone once the **Counsel** button is selected on the equipment. **To stop displaying the laptop screen at** any point, click the **Counsel** button again.



Contact the courtroom personnel immediately if exhibits do not display after clicking the **Counsel** button, or if there are any issues with the volume.



For parties who may be appearing remotely, contact the courtroom personnel for instructions.

Follow these steps when ready to display exhibits:

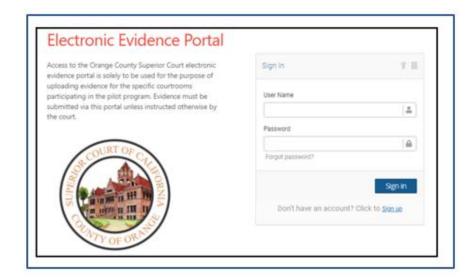
1. Ensure the laptop or device used to access the portal is connected to the evidence presentation equipment.

### If the laptop appears to be malfunctioning, or off, contact the courtroom personnel immediately.



Prior to selecting an exhibit to display via the evidence presentation equipment in the courtroom, request permission from the court to display each exhibit.

2. Log into the electronic evidence portal prior to the start of the hearing. Enter the appropriate Username and Password. Click **Sign In**.





After twenty minutes of inactivity, parties will be automatically logged out of the portal. Prior to this, parties will receive a pop-up indicating the session will be expiring soon. To extend the session, select **Extend Session**.

3. Navigate to the appropriate case in **Court Hearings**. Select the **View** option from the appropriate case to display exhibits in the **Gallery** view.



Clicking **View** will display ALL exhibits uploaded. Select the **Counsel** button when ready to display an exhibit and after requesting permission from the Court to do so. **To stop displaying the laptop screen at any point, click the Counsel button again.** 



4. In the **Gallery** window, select the list icon to display exhibits on a list or toggle back using the picture icon to view as a gallery.



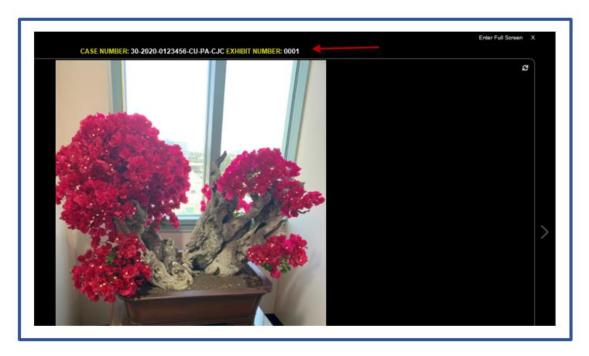
To view or display an exhibit select the **Expand** icon on the exhibit. To view in **Full Screen**, click on **Enter Full Screen**.



5. Use the rotate icon to spin the exhibit as needed for appropriate viewing. Depending on the exhibit file, the icon may appear differently or in another area of the exhibit. See below.



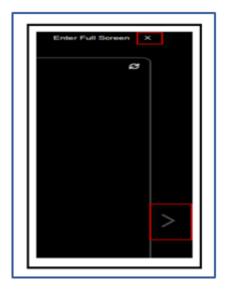
An exhibit ribbon containing the case and exhibit numbers appears above each exhibit.



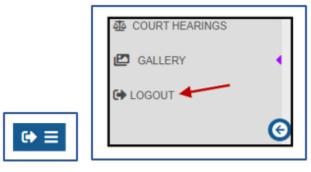
**Confidential** exhibits will display a file folder with the word **CONFIDENTIAL** across it. To view them, click **Ok** on the warning message. The image will remain visible until you exit the view.



- 6. Click on the **Counsel** button with the arrow pointing towards who would like to display their exhibits, when ready to display the exhibits to the courtroom. If you are sitting on the right side of the table, click on **Counsel** →. If you are sitting on the left side of the table, click on **Counsel** ←. If audio will be played from the portal over the evidence presentation equipment in the courtroom, adjust the volume by turning the volume nozzle to the right to make the sound louder, and left to lower the volume.
- 7. You may utilize the arrow in the open exhibit to navigate to the next or previous exhibit. Click the "X" to close the window.



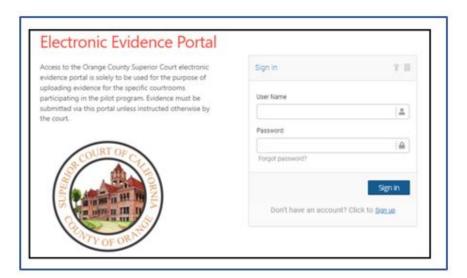
8. When finished displaying exhibits, log out of the portal by selecting the arrow in the upper right corner or the Logout option on the left task bar.



9. Reach out to the courtroom personnel, if necessary, for any further assistance with the courtroom equipment.

### Viewing Exhibits (When the Court Displays on a Party's Behalf)

1. Log into the electronic evidence portal prior to the start of the hearing to follow along during the hearing. You may utilize your exhibit list to also provide the court direction on which exhibits to display on your behalf.





After twenty minutes of inactivity, parties will be automatically logged out of the portal. Prior to this, parties will receive a pop-up indicating the session will be expiring soon. To extend the session, select **Extend Session**.

2. Navigate to the appropriate case in **Court Hearings**. Select the **View** option from the appropriate case to display exhibits in the **Gallery** view.

Clicking View will display ALL exhibits uploaded.



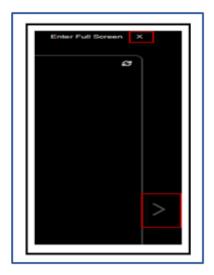
Navigating to the Gallery will allow parties to be able to follow along during a hearing and direct the court to which exhibits the court will display on a party's behalf.



3. In the **Gallery** window, select the list icon to display exhibits on a list or toggle back using the picture icon to view as a gallery.



- 4. Utilize the Exhibit List and exhibit receipt, and descriptions of exhibits, as necessary, to provide the court with information regarding which exhibit needs to be displayed.
- 5. You may utilize the arrow in the open exhibit to navigate to the next or previous exhibit. Click the X to close the window.



6. **Confidential** exhibits will display a file folder with the word **CONFIDENTIAL** across it. To view them, click **Ok** on the warning message. The image will remain visible until you exit the view.



7. When the hearing has concluded, log out of the portal by selecting the arrow in the upper right corner or the Logout option on the left task bar.



8. Contact the courtroom personnel, if necessary, for any further assistance.

### EXHIBIT RETURN - SMALL CLAIMS

When a Small Claims case has been completed, the portal will send an email to the uploader, notifying them that they have 60 days from the date of the notice to download their exhibits. Uploader can immediately log in to their account to start downloading all the uploaded exhibits. Download exhibits affixing the Exhibit Ribbon, see page 21 for instructions.

### EXHIBIT RETURN/RETENTION - CIVIL, FAMILY LAW AND PROBATE

Upon completion of any Civil, Family Law or Probate hearing, if parties stipulate to the return of the exhibits or the court makes an order to return them to the submitting party, the uploader will receive an email notifying them that they have 30 days to download their exhibits from their accounts. Download exhibits affixing the Exhibit Ribbon, see page 21 for instructions.

If the court does not make an order or the parties do not stipulate to the return of exhibits at the conclusion of the hearing, all marked and admitted exhibits will be transferred to Records and Exhibit Management for further retention pursuant to Code of Civil Procedure § 1952.



# **Important Things to Note:**

- Refer to the courtroom's individual policies and procedures for information surrounding deadlines and additional information.
- Contact the courtroom for specific questions regarding the case.