Creating a Probate Case

I. Creating a Probate Case

1. Go to **CMAINIT**.

2. Enter your **Court Code**.

3. Enter your **Location**.

4. Enter the **Case Type**.

HINT: As of 1/1/2017, only the Case Type codes from the cover sheet will be entered in Contexte.

5. Leave the word **NEXT** in the Case ID field.

6. In the field next to the Case ID, type a **Case Description** using Contexte data entry standards.

7. Click in the **Filing Date** field, and enter the date that matches the file mark on your case paperwork. EX: **091513** for September 15, 2013.

8. Press **Tab** to go to the next field, and enter the Filing **Time**. EX: 0900 for 9AM or 1300 for 1PM.

9. Press **Ctrl** and **PgDn** to go to the next block. Notice that the case ID will generate for you.

10. You are now in the **Party** Tab.

II. Entering Parties

HINT: The Judge will automatically populate when you first create the case.

1. Press **F6** to insert a new record.

2. Enter the **Party Type**.

3. Click the **ID** LOV button, and this will take you to **CPIIDEN**.

4. In the top block, search for the party by Last Name and First Name. You can also narrow the search down by using the DOB or Middle Name.

5. Press **Ctrl** and **PgDn** to go to the next block.

6. Results will display. Double-click the correct party, and his/her information will automatically fill in for you in CMAINIT.

HINT: If no query results display, click the **Clear Form** icon to search a different way.

HINT: If you are unable to find the party, click the **Red Door** icon, and this will take you to CMAINIT. Type the word **NEXT** in the ID field. Enter the party's name and address. After saving, an ID will generate for the party.

7. Press **F10** to save.

8. Repeat steps 1-7 for additional parties

III. Associating Parties

HINT: When you save a certain party such as an Attorney, you will receive a dialog box asking if you want to associate this party to another.

1. Click **OK**, and this will take you to **CDAPRTY**.

2. Click on the Attorney record so that it becomes highlighted.

3. Click **Party Associations** in the Navigation Frame.

4. Click the **checkbox** beside the person who is being represented by the attorney.

5. Press **F10** to save.

6. Click the **X** on the small CDAPRTY window to close it. You can now see the associated parties with checkmarks beside them.

7. Click the **Red Door** icon, and this will take you to CMAINIT.

IV. <u>Entering Demographic Information</u>

1. Click on the **Demographic** Tab.

2. Click the **Party Type** LOV button, and this will take you to **CDAPRTY**.

3. Double-click the party to add demographic information.

4. You will be taken back to the demographic tab. Press **Ctrl** and **PgDn** to go to the next block.

5. Enter demographic information such as DOB, SSN, Sex, Race, etc.

6. Press **F10** to save.

V. <u>Entering Dockets/Filings</u>

1. Click on the **Short Docket** Tab.

2. Press **F8** to display any existing automatic docket codes.

HINT: You will not have to type the code if automatic docket codes are configured.

3. If no automatic docket codes appear, type **MFO** in the Docket field. Description will default.

4. Click the **Party Type** LOV button, and this will take you to CDAPRTY.

5. Double-click on the filing party.

6. Press **Tab** to change **Filing Date** and **Time**, if needed.

7. Press **F6** to insert a blank record and add other dockets such as petitions or orders.

8. Change the **Filing Date** and **Time** for each docket code as needed.

9. Press **F10** to save.

Adding the Confidential Information Sheet

HINT: Add the Confidential Information Sheet when you actually receive it.

1. While still in the Short Docket Tab of CMAINIT, click on **(Docket) CDADOCT** in the Navigation Frame.

HINT: The Case ID will pull over into CDADOCT.

2. Press **Ctrl** and **PgDn** to go to the next block.

3. Press **F8** to retrieve existing docket entries.

4. Press **F6** to insert a new record.

5. Type **COINF** in the Docket field. Description will default.

6. Press **Tab** to change **Filing Date** and **Time** to match the file mark on your case paperwork.

7. Press **F10** to save.

8. Click on the COINF record so that it becomes highlighted.

9. Click on **(Docket) COASITE** in the Navigation Frame.

HINT: The Confidential Information Sheet will display.

10. Enter all the relevant fields (skip the first 8 fields and begin with entering child information).

11. Press **F10** to save.

12. Click the **Red Door** icon, and this will take you back to CDADOCT.