**How To Training**

**For**

**CMS Case File – Filings Tab**

## Adjudicatory and Non-Adjudicatory Cases

When the **Case File Screen** is accessed, the default view is the **Filings** tab which contains a listing of filings/issuances associated with a specific case. This screen is available to External Users (Registered and Public).

###

**Objective:**

* View Filed/Issued Documents

| **Step** | Action |
| --- | --- |
|  | From the *Home* Page 🡪, Click on Case File 🡪 Case Files on the access menu list  |
| 1.
 | Case Search will be displayed* Enter Cas*e* Number in Text Box

* Click on GO Button to display specified Case File.

- OR – |
|  | If user does not know case number:* Click on Search Button, enter known search criteria
* Click on Search Button
* Search result will display all cases matching entered parameters
* Click on Case Number hyperlink to be navigated to the Case File Screen for the specified case.
 |
|  | By default the Filings tab will be selected and the grid will display all filings and issuances in the grid with the following columns:* Item No.
* Date Filed
* Description of Filing
* Filing Party
* Filed By
* No. of Attachment(s)
* If a filing has been rejected the last column will display the following: Document deleted – submitted in Error
 |
|  | * Click on Back Button to navigated to the previous screen
 |
|  | * Click on Item No. link for the filing to view filing details and attachment(s)

 |
|  | Filing Information will be displayed in the first section:* Item No.
* Filing on Behalf of
* Description of Filing
* Compliance Filing (Yes/No)
* Date Filed
* Filed By
 |
|  | Attachments Sections will display with the following columns:* Document Title (hyperlink)
* Document Type
* Document Subtype
* Security
* View P.O.
* File Size
* Software Designator Icon
 |
|  | In the Attachments Grid:* Click on Document Title link to view attachment
* Document will open second pop-up window that will display the public document
* Document can also be saved use users computer
* Confidential Document access will be based on security measures in place (Clerk of the Commission, Assigned Staff and Staff Users who have been granted access by Clerk of the Commission)
* Close the document once it has been viewed
 |
|  | * Click on Close Button to close the Filing Information pop-up window
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