



Portal Advanced User Guide
Accessing Judicial Records 10/27/2023

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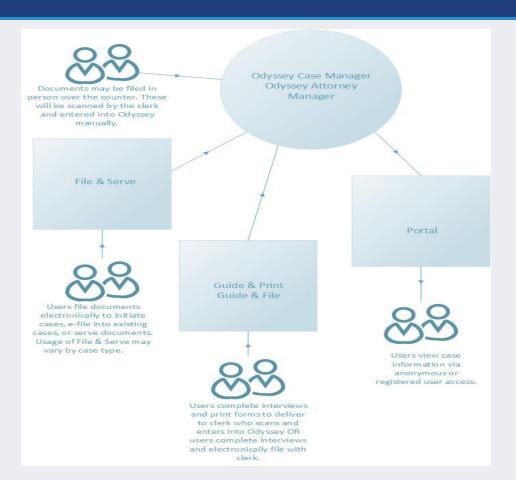
#### INTRODUCTION

**eCourts Portal,** a Tyler Technologies product, is designed for users to view court calendars, information, records, pay fees and fines online, and judgment information, indexed in accordance with North Carolina General Statute § 7A-109(b).

#### Purpose of This Guide:

 Assist the general public and registered users in accessing court information with stepby-step guidance, particularly when accessing eCourts Portal outside of a courthouse terminal.

#### INTRODUCTION



- Portal is part of the North Carolina eCourts system; which is a package of newsoftware applications and improvements that will transition the court system from paper to digital records.
- Portal is a window into Odyssey and can only be used to VIEW court records.

#### **JUSTICE FOR ALL**



The North Carolina Judicial branch is committed to providing <u>Justice</u> <u>For All</u>citizens of North Carolina. While Portal provides public access to most cases in Odyssey.

Please note the following:

Categories of records classified as confidential or sealed cannot be accessed via Portal, including:

- Court records sealed by judicial order
- Pre-Birth Determinations

Some categories of records are classified as restricted to the public and require Elevated Access to view in Portal:

- Criminal Warrants Unreturned
- luvenile case records
- Protective Order Records
  - Non-Domestic Restraining Orders Filed by Agency
  - Non-Domestic Restraining Orders Filed by Other
  - Domestic Violence Protection Orders
- Special Proceeding Confidential for Name Change, Involuntary Commitment, and Other

## TERMINOLOGY

Portlets:	Sections on the Portal home page that allow the user to a ccess Portal features
Case Summary aka Register of Actions:	A summary of public docket entries in public case types based upon the derk's official record
Wild Card:	Wild cards take the place of one or more characters in a search term
Index:	A brief snapshot of a Judgment
File & Serve:	As s ists users in filing and serving legal documents
eCourts	A package of new software applications and technology infrastructure improvements that will transition our court system from paper to digital.

#### NOTES:

 The Register of Actions is NOT the official court record

#### **ACCESSING PORTAL**

Step I Click on the link, <a href="https://portal-nc.tylertech.cloud/Portal/">https://portal-nc.tylertech.cloud/Portal/</a> or Scan the QR Code

**Step 2** The Portal Home Screen will Display as shown below:





Portal can be accessed with most phones, tablets, and mobile devices.

Scanthe QR Code

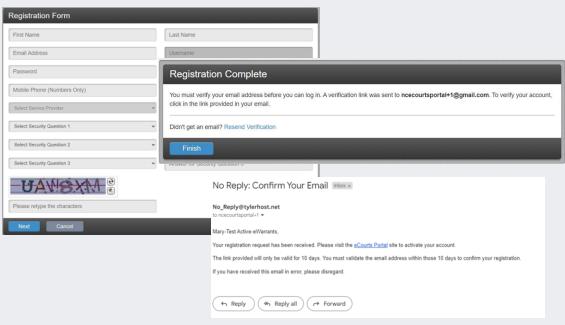


#### **REGISTERING IN PORTAL**

(Not required for attorney users)

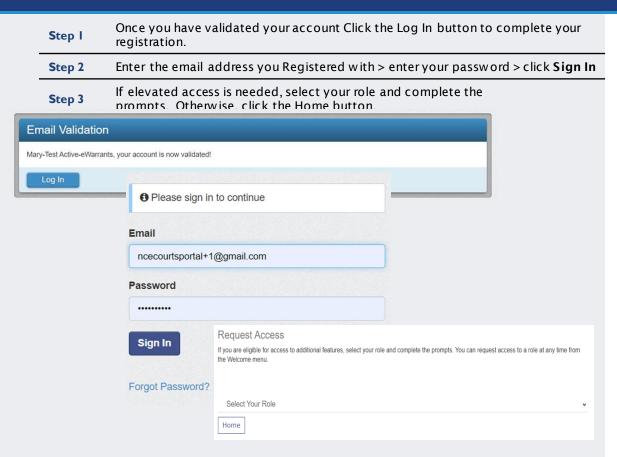
- Step I On the Portal Home Page, click Register/Sign In ♣ choose Register

  Step 2 Complete the Registration Form
- Step 3 Check your email account for a message from No\_Reply@tylerhost.net, and click link to complete activate your account.



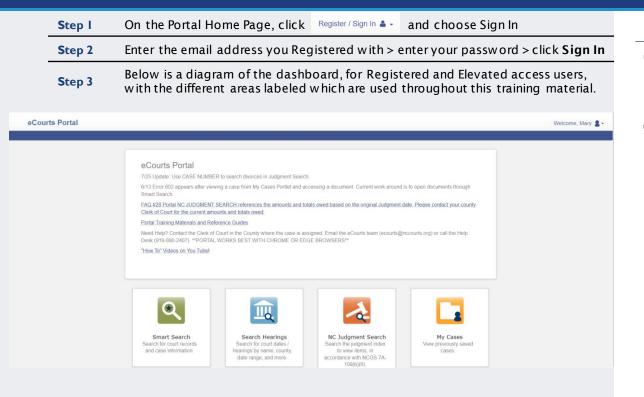
- Portal can be used without registering (anonymous user)
- Users can Register to create personal account
- Users can request Elevated Access to view additional information as entitled by statute
- Registered and Elevated Access users will have a My Cases portlet where they can save cases of interest

#### SIGNING INTO PORTAL



- Portal can be used without signing in (anonymous user)
- Users MUST loginto Portal to complete the registration process
- Users can request Elevated Access to view additional information as entitled by statute

#### SIGNING INTO PORTAL



- Portal can be used without signing in (anonymous user)
- Registered and Elevated Access users will have a My Cases portlet where they can save cases of interest

#### **MY CASES**

#### **Step I** Click the My Cases Portlet on the Portal Home Page



Non-Attorney Users will have one (1) tab for Added Cases. Attorney Users will have three (3) tabs: Added Cases, Attorney of Record Cases, and Juvenile Records Cases

# 🐝 My Cases

My Cases

Step 2

Added Cases Attorney of Record Cases Juvenile Records

- Added Cases Public Record cases manually added by User
- Attorney of Record Cases —
  Automatically populates based
  on ACTIVE attorney of record as
  listed in Odyssey (including
  juvenile cases); regardless of
  the active/inactive case status
- Juvenile Cases Automatically populates based on ACTIVE attorney's representing juveniles in Juvenile Delinquency (JB) court proceedings
- If errors occur when accessing cases or opening case documents for cases located in the My Cases portlet, use Smart Search to manually search for the case, Open the Case Summary and Click the Add to My Cases link to resolve the errors

# **Elevated Access**

Available for users with a verified business need and authority granted by statute to view generally restricted case information and non-public information

Requests are initiated by the user and processed by the North Carolina Administrative Office of the Courts

#### **NOTES:**

Elevated Access allows access to restricted information, permitted by statute, based on role:

- Active eWarrants PII, Warrants Unreturned, and Protective Order Cases
- Government Agency PII
- Domestic Violence Agency PII and Protective Order Cases
- Attorney Cases for which the attorney is listed as the ACTIVE attorney of record as assigned by Party ID
- DSS, Court Counselors, GAL
   Program Volunteers Cases as assigned by Party ID
- Juvenile, Parent, Guardian, or Custodian – Cases as assigned by Party ID

Sealed or confidential records and documents with sensitive information are not available for viewing on Portal.

#### **ELEVATED ACCESS**

# Who can apply for Elevated Access?

# Active eWarrant User •Any LEO or a dministrative support who is statutorily permitted to view Warrants Government & Domestic Violence Agencies

- Any government agency employee who has DCIN certification and a verifiable business need for PII
- Any domestic violence a gency who has a primary service of providing support to domestic violence victims and
- a business need to Protective Order Cases
- Registration with Agency email required!

# Active Party assigned to Odyssey Case

- Attorney
- GAL Program Volunteer
- Mother, Father, Father (Legal), Father (Putative), Guardian, Custodian
- luvenile
- DSS Social Worker
- Juvenile Court Counselor
- Special Proceeding Confidential (SPC) Respondent

#### **NOTES:**

#### **Application Process**



 Processing times vary dependent on the volume of requests received; requesters are notified by email or through File & Serve when approved or denied

Unreturned

email required!

Registration with Agency

## Reasons for being denied Elevated Access:

# Non-Attorney

- •Active eWarrants User Only: Requester must register and request Elevated Access with his/herfederal, state, or law enforcement email address (UPN is not an email address).
- Active eWarrants User Only: Requestor must have an ACTIVE eWarrants User ID. Contact your Agency eWarrants Administrator for resolution before submitting a new request.
- Active eWarrants User Only: The Agency may not be an authorized user of eWarrants or your identity cannot be verified. Contact your Agency eWarrants Administrator for resolution before submitting a new request.
- Requestor is not listed as an Active Party or Participant on the case provided.
- Requestor must register and request elevated access with the email issued by his/her federal, state or local government employer.

#### **NOTES:**

#### If Denied:

 Non-attorney us ers will be notified via email from Portal

#### **ELEVATED ACCESS**

## Reasons for being denied Elevated Access:

# **Attorney**

- AOC-A-264 Form was not included on the File
   Serve submission.
- AOC-A-264 Form was not completed/signed and/or was completed incorrectly.
- Filing attorney has already been granted Elevated Access. Additional questions may be submitted to ecourts@nccourts.org or by calling the NCAOC Help Desk at (919) 890-2407.
- Only one Elevated Access request can be accepted perfiling. Please re-submit filings individually.
- •There was an error on your filing; correct and resubmit.
- Filing attorney has initiated the Portal Registration process and must complete the process, including logging into Portal, prior to resubmitting a completed AOC-A-264.

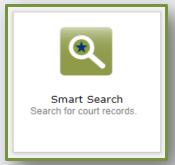
#### **NOTES:**

#### If Denied:

 Attorney us ers will be notified via e Courts File & Serve

#### **SMART SEARCH - BASIC SEARCH**

#### **Step I** Click the Smart Search Portlet on the Portal Home Page



# To begin searching for court records, use Smart Search to enter a case number or a person's name (last, first)

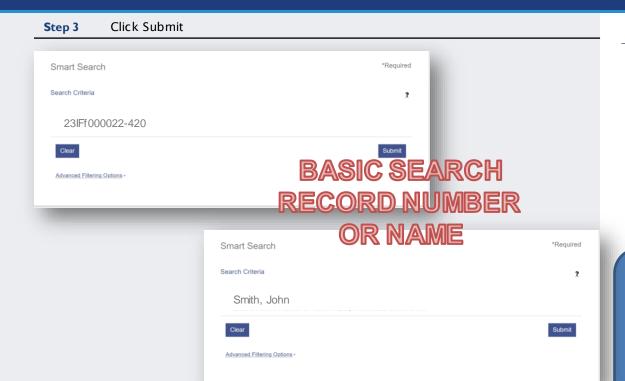


#### **NOTES:**

Smart Search is for ALL
 Odyssey implemented
 counties. Court records
 from counties not using
 Odyssey do not return

Sealed or confidential records and documents with sensitive information are not available for viewing on Portal.

#### **SMART SEARCH - BASIC SEARCH**



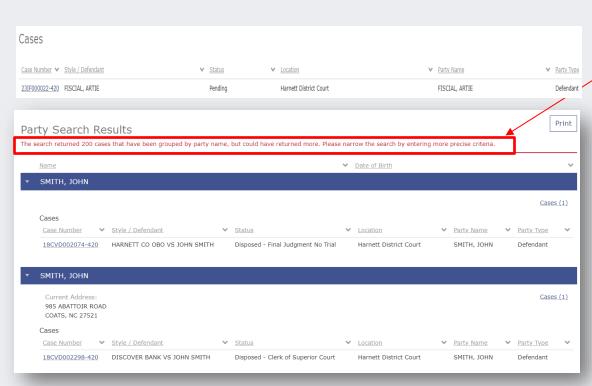
#### **NOTES:**

 Smart Search is for ALL Odyssey implemented counties. Court records from counties not using Odyssey do not return

Sealed or confidential records and documents with sensitive information are not available for viewing on Portal.

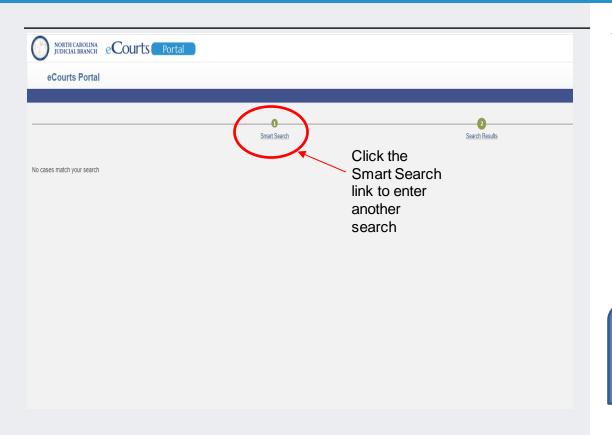
#### **SMART SEARCH – BASIC SEARCH**

#### **Step 4** Select a Case Number from the results returned to display the Register of Actions.



- The maximum results returned is 200
- If the error message stating,
   "200 results were returned,"
   then use the Advanced
   Filtering Options to narrow
   search results
- Case number results are specific and return only records with that case number
- Name searches typically return a greater number of records

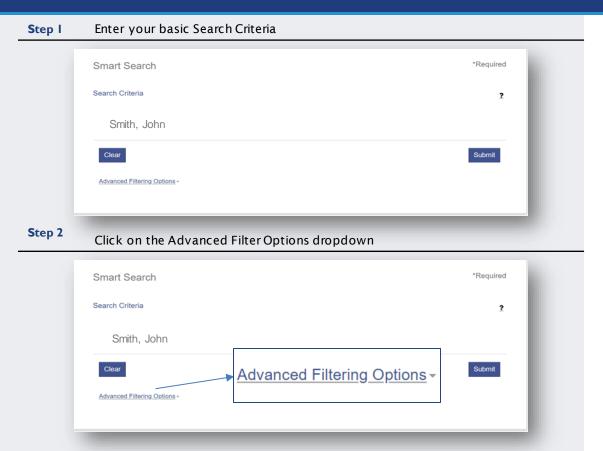
#### **SMART SEARCH - BASIC SEARCH**



#### **NOTES:**

- If "No cases match your search" displays:
  - Confirm the case number/name entered is correct
  - Confirm the case number/name entered is in the correct format
  - Confirm the case is in a county that has gone live with Odyssey
  - The record may not exist
  - The record may be
     a Restricted case type

Sealed or confidential records and documents with sensitive information are not available for viewing on Portal.

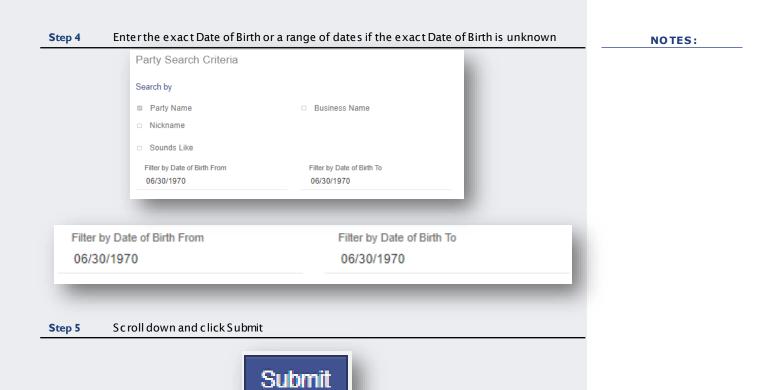


#### **NOTES:**

Advanced Filtering
 Options allow you to
 filter by the Search
 Criteria. They cannot
 be used alone to
 complete a Search

#### Select your Advanced Filtering Search Criteria Options Step 3 General Options Filter by Location Party Search Criteria All Locations Search by □ Harnett County Party Name □ Business Name □ Johnston County □ Nickname □ Lee County □ Sounds Like Filter by Date of Birth From Filter by Date of Birth To Filter by Search Type Smart Search Filter by Gender Include Filter by Ethnicity Cases Filter by FBI Number Bail bondsmen are listed as Businesses in Filter by SO Number Odyssev. Case Search Criteria Filter by Case Type Filter by Case Status Filter by File Date Start Filter by File Date End

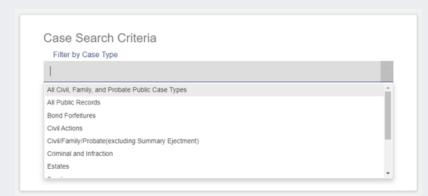
- Advance Filtering Options allow results to be filtered (or narrowed) by any one or combination of the following:
  - Search Type (Case Number, Business Name, Citation Number, etc.)
  - Location
  - Party Search Criteria section, includes Date of Birth
  - Case Search Criteria
- Smart Search defaults to Case Number or Party Name. Selecting the Party Name Search, from Advanced Filtering Options is NOT RECOMMENDED! It will limit search results and does not support the use of the wild card.





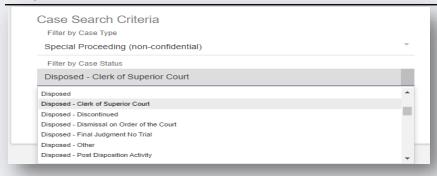
- The month and day of the Date of Birth is masked by "xx/xx" to protect the individual's privacy, but the year displays to help narrow search returns
- Elevated Access is required to see the entire, unmasked Date of Birth

#### Step 7 Select a Case Type from the Filter by Case Type Drop Down



The Case Type filter can be used to find cases indexed according to NCGS § 7A-109(b).

#### **Step 8** Based on the selected Case Type, select the appropriate Case Status



Selecting a Case
Status, which is not applicable to the
Case Type, will lead to incomplete search results.

- Filtering by Case Type does NOT narrow the Case Status selections
- A crosswalk list of Case Status by Case Type follows on slides 14-23

# Case Status Civil Actions

# Choose Case Type

**Bond Forfeiture** 

Civil Foreclosure (CV)

Civil Foreclosure (M)

Civil General

Civil Magistrate

Confession of Judgment

 ${\bf Non\text{-}Domestic\,Restraining\,Orders}$ 

Summary Ejectment

## 2

#### **Choose Case Status**

djudicated Incompetent

Appealed

isposed - Clerk of Superior Court

Disposed - Discontinued

Disposed - Dismissal on Order of the Court

Disposed - Final Judgment No Trial

Disposed - Othe

Disposed - Post Disposition Activity

Disposed - Trial by Judge

Disposed - Trial by Jury

Disposed - Trial by Magistrate

Disposed - Voluntary Dismissal

Incompetent to Stand Trial (Incapable to Proceed)

Inpatient Involuntarily Committed

Not Guilty by Reason of Insanity

Outpatient Commitment Dangerous

Pending

Removal of Mental Health Bar

Reopened

Small Claims Appeal

Stayed

Substance Abuse Commitment

Transfer of SPC file

Transfer to Another County

Transferred to Superior Court

Trial De Novo

Unserved

SPC Index Conversion



# Case Status Civil Actions Continued

1

### **Choose Case Type**

Civil Domestic with Divorce

Civil Domestic without Claim for

Divorce

Domestic Violence Protection Order

Filed By Agency

Domestic Violence Protection Order

Filed By Other

Miscellaneous Domestic Filings



Administrative Closure

Appealed

Completed

Disposed

Disposed - Clerk of Superior Court

Disposed - Discontinued

Disposed - Dismissal on Order of the Court

Disposed - Final Judgment No Trial

Disposed - Other

Disposed - Post Disposition Activity

Disposed - Trial by Judge

Disposed - Trial by Jury

Disposed - Trial by Magistrate

Disposed - Voluntary Dismissal

Pending

Remanded

Reopened

Sta ye d

Transfer to Another County

Transferred to Superior Court

**Unserved** 

Transfer of SPC file

Transfer to Another County

Transferred to Superior Court

Trial De Novo

Unserved

# Case Status Bond Forfeiture

Choose Your Case Type

**Bond Forfeitures** 



#### **Choose Case Status**

Adjudicated Incompetent

Appealed

Disposed - Clerk of Superior Court

Disposed - Discontinued

Disposed - Dismissal on Order of the Court

Disposed - Final Judgment No Trial

Disposed - Other

Disposed - Post Disposition Activity

Disposed - Trial by Judge

Disposed - Trial by Jury

Disposed - Trial by Magistrate

Disposed - Voluntary Dismissal

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Reopened

Small Claims Appeal

Stayed

Substance Abuse Commitment

Transfer of SPC file

Transfer to Another County

Transferred to Superior Court

Trial De Novo

Unserved

SPC Index Conversion

27

Transferred to Superior Court Voluntarily Dismissed with Leave

### Case Status **Criminal and Infraction Choose Case Status Choose Your Case Type** Appealed – Appellate Archived Criminal Completed Disposed Infraction **Pending** Pending – Reported to DMV Out of State Probation Pending Expungement Remanded Out of State Parole Transfer to Another County

### Case Status

### **Estates**

### **Choose Case Type**

Decedents' Estate – Full Administration

Decedents' Estate - Small Estate

Document / Filing (No Further

Action)

Funds Deposited for a Minor / Incapacitated Person

Guardianship - Acceptance of

Transfer from Another State

Guardianship - General or Estate

Guardianship – Person

Proceeding For Judicial Relief

Trust - Cemetery Trust

Trust - Testamentary Trust With

**Accountings Required** 

### Choose Case Status

Active Reopened

Adjudicated Incompetent

Appealed

Closed

Disposed - Clerk of Superior Court

Disposed - Discontinued

Disposed - Dismissal on Order of the Court

Disposed - Final Judgment No Trial

Disposed - Other

**Disposed - Post Disposition Activity** 

Disposed - Trial by Judge

Disposed - Trial by Jury

Disposed - Trial by Magistrate
Disposed - Voluntary Dismissal

Filed

Incompetent to Stand Trial (Incapable to

Proceed)

Inpatient Involuntarily Committed

Not Guilty by Reason of Insanity

**Outpatient Commitment Dangerous** 

Pending

Remanded

Removal of Mental Health Bar

**Substance Abuse Commitment** 

Transfer of SPC file

Transfer to Another County

Transferred to Superior Court

Will/Codicil for Safekeeping Withdrawn

**SPC Index Conversion** 

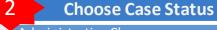
# Case Status Family

Choose Case Type

Civil Domestic with Divorce

Civil Domestic without Claim for Divorce

Miscellaneous Domestic Filings



Administrative Closure

**Appealed** 

Completed

Disposed

Disposed - Clerk of Superior Court

Disposed - Discontinued

Disposed - Dismissal on Order of the

Court

Disposed - Final Judgment No Trial

Disposed - Other

Disposed - Post Disposition Activity

Disposed - Trial by Judge

Disposed - Trial by Jury

Disposed - Trial by Magistrate

Disposed - Voluntary Dismissal

**Pending** 

Remanded

Reopened

Stayed

Transfer to Another County

Transferred to Superior Court

Unserved



## **Case Status**

Registration

1

**Choose Your Case Type** 

Registration



#### **Choose Case Status**

diudicated Incompetent

Appealed

Disposed - Clerk of Superior Court

Disposed - Discontinued

Disposed - Dismissal on Order of the Court

Disposed - Final Judgment No Trial

Disposed - Other

Disposed - Post Disposition Activity

Disposed - Trial by Judge

Disposed - Trial by Jury

Disposed - Trial by Magistrate Disposed - Voluntary Dismissal

ncompetent to Stand Trial (Incapable to Proceed

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Pending

Removal of Mental Health Bar

Reopened

Small Claims Appeal

Stayed

Substance Abuse Commitment

Transfer of SPC file

Transfer to Another County

Transferred to Superior Court

Trial De Novo

Unserved

SPC Index Conversion



# Case Status Special Proceeding

Choose Case Type

Foreclosure (Special Proceeding)

Incompetency

Name Change

**Special Proceeding** 

Choose Case Status

Active Reopened

Adjudicated Incompetent

Appealed

Closed

Disposed - Clerk of Superior Court

Disposed - Discontinued

Disposed - Dismissal on Order of the Court

Disposed - Final Judgment No Trial

Disposed - Other

Disposed - Post Disposition Activity

Disposed - Trial by Judge

Disposed - Trial by Jury

Disposed - Trial by Magistrate

Disposed - Voluntary Dismissal

Filed

Incompetent to Stand Trial (Incapable to

Proceed)

Inpatient Involuntarily Committed

Not Guilty by Reason of Insanity

Outpatient Commitment Dangerous

Pending

Remanded

Removal of Mental Health Bar

Substance Abuse Commitment

Transfer of SPC file

Transfer to Another County

Transferred to Superior Court

Will/Codicil for Safekeeping Withdrawn

SPC Index Conversion

# Case Status Special Proceeding Continued

Choose Case Type

Adoptions

#### Choose Case Status

Administrative Closure

**Appealed** 

Completed

Disposed

Disposed - Clerk of Superior Court

Disposed - Discontinued

Disposed - Dismissal on Order of the

Court

Disposed - Final Judgment No Trial

Disposed - Other

Disposed - Post Disposition Activity

Disposed - Trial by Judge

Disposed - Trial by Jury

Disposed - Trial by Magistrate

Disposed - Voluntary Dismissal

Pending

Remanded

Reopened

Stayed

Transfer to Another County

Transferred to Superior Court

Unserved

## **Case Status**

Wills Deposited for Safekeeping

1

**Choose Case Type** 

Wills Deposited for Safekeeping



### **Choose Case Status**

Active Reopened

Adjudicated Incompetent

Appeale

Closed

Disposed - Clerk of Superior Court

Disposed - Discontinued

Disposed - Dismissal on Order of the Court

Disposed - Final Judgment No Trial

Disposed - Other

**Disposed - Post Disposition Activity** 

Disposed - Trial by Judge

Disposed - Trial by Jury

Disposed - Trial by Magistrate

Disposed - Voluntary Dismissal

Filed

Incompetent to Stand Trial (Incapable to

Proceed)

Inpatient Involuntarily Committed

Not Guilty by Reason of Insanity

Outpatient Commitment Dangerous

Pending

Remanded

Removal of Mental Health Bar

Substance Abuse Commitment

Transfer of SPC file

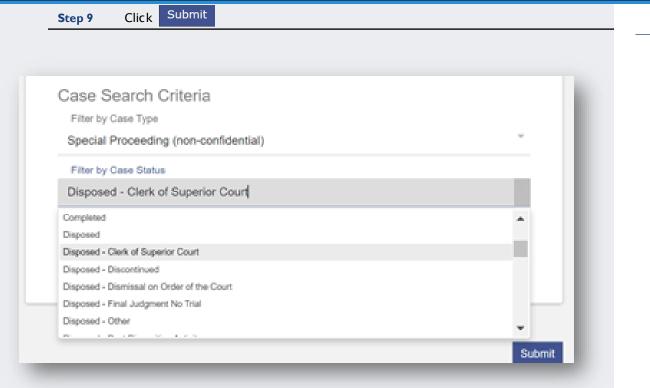
Transfer to Another County

Transferred to Superior Court

Will/Codicil for Safekeeping Withdrawn

**SPC Index Conversion** 





**CLICK TO RETURN TO TABLE OF CONTENTS** 

#### **Step 10** Results meeting the Filtering options will display

Cases					
Case Number V Style / Defendant	✓ Status	<ul> <li>Location</li> </ul>	✓ Party Name	✔ Party Type	~
23CR000001-910 STATE OF NORTH CAROLINA VS QCTECR def civil	Pending	Wake Superior Court	civil, QCTECR def	Defendant	
23CR100002-910 STATE OF NORTH CAROLINA VS QCTECR def civil	Pending	Wake District Court	civil, QCTECR def	Defendant	
23CR100003-910 STATE OF NORTH CAROLINA VS QCTECR def civil	Pending	Wake Clerk of Superior Court	civil, QCTECR def	Defendant	

#### SMART SEARCH - WILDCARD SEARCH

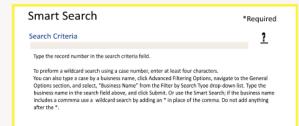
#### **Step I** Use the \* wildcard to assist with Searching (see examples below)

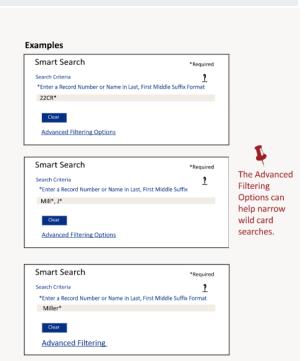
1 Click the ? in the upper right hand corner.

Smart Search
Search \*Required
Search Criteria
\*Enter a Record Number or Name in Last, First Middle Suffix Format

Clear
Advanced Filtering Options

2 This message will appear.



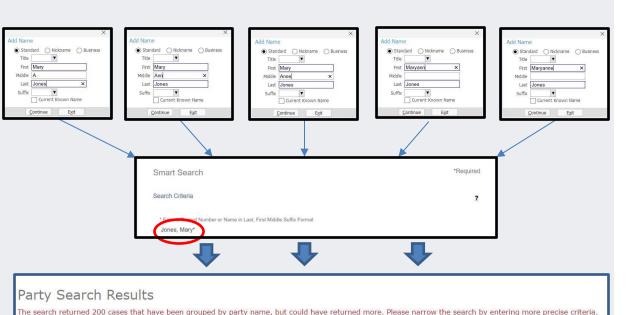


#### **NOTES:**

Wildcard Search WILL NOT work with business names that have a space or special character in the 1st 3 letters of the name (ex: A-1 will not work with wildcard due to the special characters of – and 1; A Helping Hand will not work with a wildcard due to the space between A and Helping)

#### SMART SEARCH WILDCARD SEARCH - COMPOUND AND COMPLEX NAMES

Use of wildcard functionality aids in searching for compound and complex names when the indexing standard used for the name is unknown. Placing a (\*) after the first known name yields all indexed name variations in the search results.

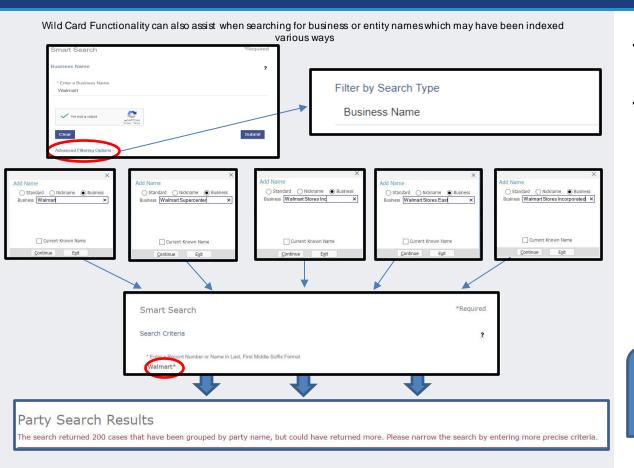


#### **NOTES:**

More information on e-Courts Name Indexing Standards can be found here

> Sealed or confidential records and documents with sensitive information are not available for viewing on Portal.

#### SMART SEARCH WILDCARD SEARCH - BUSINESS AND ENTITY NAMES



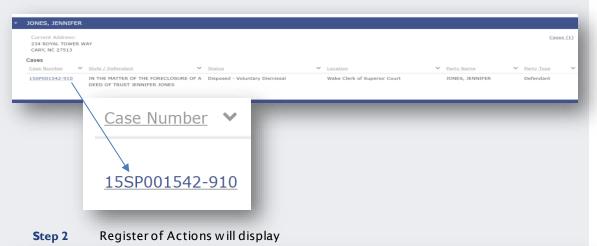
#### **NOTES:**

- More information on e-Courts
   Name Indexing Standards can be found here
- When s earching for a Business you MUST Click the Advanced Filtering Options link and Select Filter by Search Type: Business Name
  - If the business name includes a comma, then use the wild card in place of the comma and nothing after the wild card
  - If the 1st three letters of the Business Name is a number, space or special character, the wildcard will NOT work

Sealed or confidential records and documents with sensitive information are not available for viewing on Portal.

#### **REGISTER OF ACTIONS**

# Step I When a Search Returns, Click on the underlined Case Number to display the Register of Actions





Case Suffirmary

Case No. 155P001542-910

IN THE MATTER OF THE FORECLOSURE OF A DEED OF TRUST JENNIFER JONES § Location: Wake Clerk of Superior Court § Filed on: 06/02/2015 § Microfilm Number: 15 100 9999

- The Register of Action is also known as the Case Summary
- The county Clerk of Court has Odyssey functionality to view the same Case Summary to assist with questions

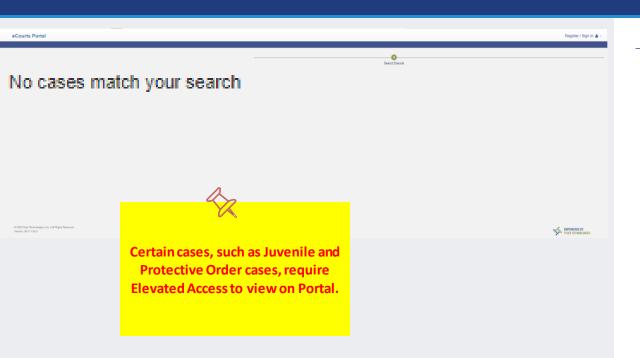
#### **REGISTER OF ACTIONS**

Step 3 Use the menu on in the upper left corner of the Register of Actions Sections to jump to specific sections

CASE SUMMARY CASE INFORMATION ASSIGNMENT INFORMATION PARTY INFORMATION **CAUSES OF ACTION CASE EVENTS** DISPOSITIONS ADD TO MY CASES

- Causes of Action are only applicable to the following Case Categories:
  - o Civil
  - o Family
  - Probate/Mental Health
- The Hearings and/or Financial Information sections display when there is information to display

#### **NO CASES MATCH YOUR SEARCH**



#### **NOTES:**

- Verifythe information was entered correctly (ex., 01CR123456-100)
- Verify the Search information was entered in the correct format (ex., Lastname, Firstname)
- If you are Searching a case that requires elevated access, verify you are logged in with the User ID that was granted elevated access
- If you are not seeing the expected cases and/or case information, contact the Clerk of Court in the county where the case is assigned

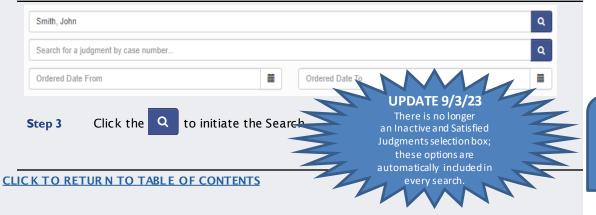
Sealed or confidential records and documents with sensitive information are not available for viewing on Portal.

#### **Step I** Click the Judgment Search Portlet on the Portal home page



Judgment Search returns items indexed in accordance with NCGS § 7A-109(b).

To begin searching for court records, use Judgment Search to enter a person's Step 2 name (last, first, middle) or a case number



#### **NOTES:**

- Anyitems deemed confidential should not return
- Results include judgments related to Civil, Family, Small Claims, Special Proceedings, Criminal, and Miscellaneous courtitems
- To view the complete case summary, a searcher must navigate to the SMART SEARCH portlet
- Portal NC JUDGMENT
  SEARCH references the
  amounts and totals owed
  based on the <u>original</u>
  Judgment date. Please
  contact your county Clerk of
  Court for the <u>current</u>
  amounts and totals owed

Sealed or confidential records and documents with sensitive information are not available for viewing on Portal.

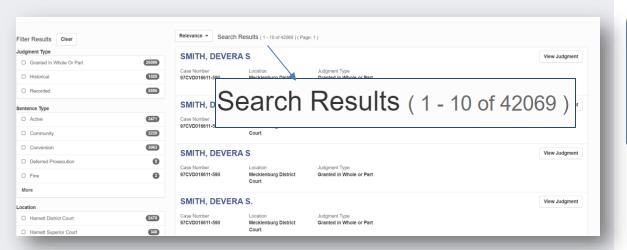
#### JUDGMENT SEARCH - WILD CARD USAGE

Last Name or	First Name	Middle	Party or Business	Results		
Business		Name	Name Searched			
Smith	Adam		Smith, Adam			
				Smith, Adam returns		
Forest	James Dean	Paul	Forest, James Dean	No results for Forest, James Dean. No results		
				found.		
Forest	James Dean	Paul	Forest, James Dean	No results for Forest, James Dean Paul. No		
			Paul	results found.		
Forest	James Dean	Paul	Forest, Jam*	Judgment Returns		
Forest	James Dean	Paul	Forest	Judgment Returns		
Snyder	T		Wildcard	Results are returned where first name starts		
			Snyder, T*	with "T"		
Snyder	T		Wildcard	Results are returned where last name start		
			Sny*, T*	with "Sny", and first name start with "T"		
Snyder	T		Wildcard	Results are returned where first name starts		
			Snyder, T*	with "T" and includes by judgments.		
			Select "Include by			
			judgment"			
Insurance Depot			Insurance Depot	Insurance Depot returns		
			Wildcard	Any business name with insurance will return.		
			Insurance*			
Jackson			Wildcard Jac*	Results include business name and last name		
Brother LLC,				where Jac* is part of the name.		
				Jackson Brother, LLC & Jackson, Tierra		
Jackson,	Tierra			Lackage Times actions		
				Jackson, Tierra returns		

#### **NOTES:**

 The key is to do an exact search first, then use a Wildcard to expand the search

#### **Step 4** Numerous results will be returned



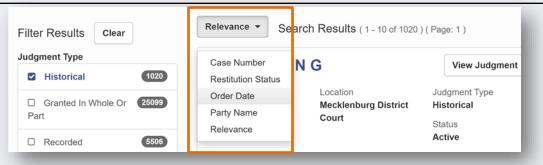
#### **NOTES:**

If Searching for divorce records by name and there are no Search Results returned, case number will need to be used. The case number can be obtained from the Clerk in the county where the divorce was filed.

**Step 5** Select the appropriate Filter from the Filter Results to narrow results



Step 6 Use the Sort dropdown to assist in finding the record



- The Advanced Filtering Options will assist users with narrowing down the judgment results based on the Judgment Type – this will include Historical, Granted, and Recorded Judgment
- This can work in conjunction with the "Location" fields and the advanced results sort field to provide a snapshot of the judgment index

# SMITH, OLIVIA Case Number 07CVM0000711-420 Location Harnett District Court Granted in Whole or Part Active View Judgment View Judgment View Judgment View Judgment View Judgment View Judgment

### Step 8 An index of the Judgment will appear

Click View Judgment

Step 7





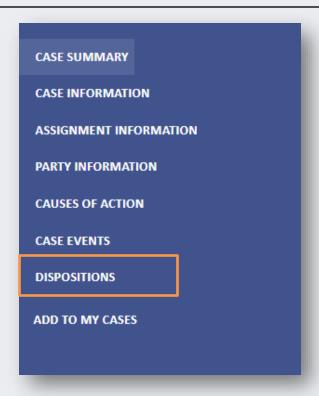
The Judgment Search provides a brief snapshot of the judgment at the time of indexing.

The Index features: Index Date Time County Current Status

#### **NOTES:**

For a more detailed description of the case index, perform a <u>Smart</u> <u>Search</u> and review the Register of Actions

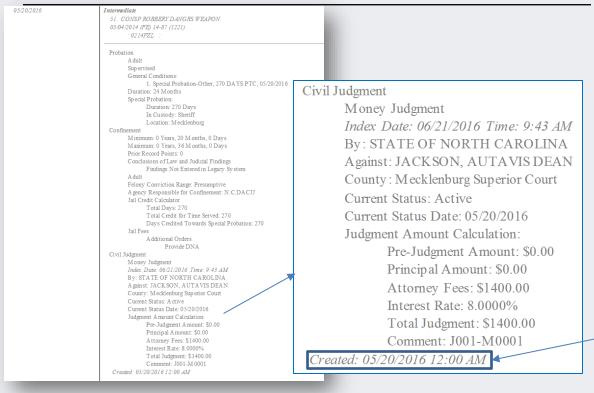
#### Step 9 Go to the Smart Search Portlet and Search for the record



#### **NOTES:**

 For additional Judgment information, perform a <u>Smart Search</u>, and access the <u>Register of Actions</u> to view the Dispositions section

# Step 10 When additional Judgment information is needed, the Disposition section of the Register of Actions provides the user with specific details



#### **NOTES:**

- AOC recommends reviewing the <u>Register of</u> <u>Actions</u> for the most current financial information on a Judgment
- However, the Portal NC JUDGMENT SEARCH is strictly for reference only
- Please contact your <u>county</u> <u>Clerk of Court</u> county Clerk of Court for the most current amounts and totals owed
- Portal NC JUDGMENT SEARCH references the amounts and totals owed based on the <u>original</u> Judgment date. Please contact your county Clerk of Court for the <u>current</u> amounts and totals owed

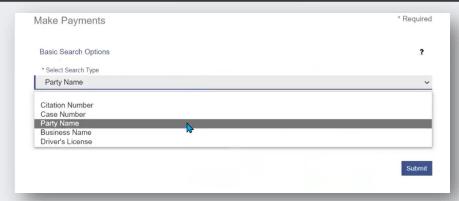
All events occurring prior to 2/13/23 display a time stamp of 12:00 AM

#### **Step I** Click the Make Payments Portlet on the Portal Home Page

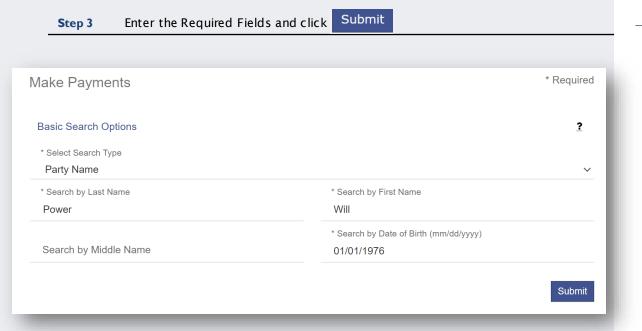




#### Step 2 Make a selection from the Select Search Type dropdown list



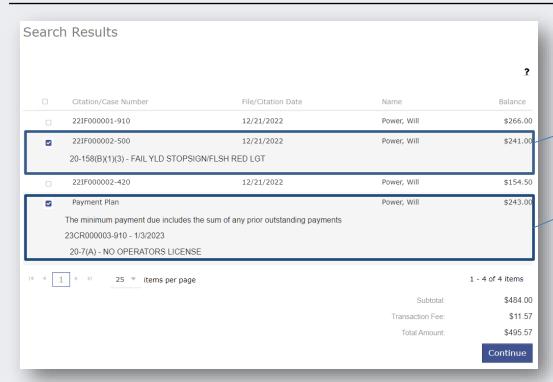
- Use a personal mobile device or see the cashier if a payment needs to be made while in the courthouse
- The Make Payments portlet is only a vailable to users that are not signedin (a nonymous users)



#### **NOTES:**

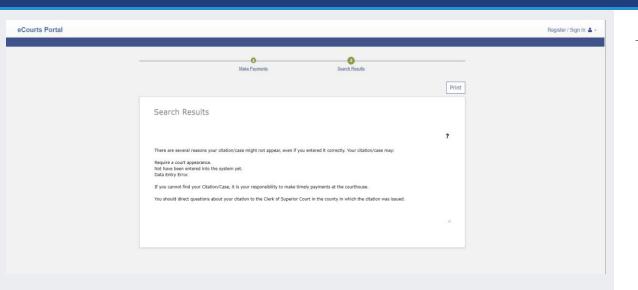
 The \* indicates a required field

## Step 4 Select the correct case(s) for payment, then click Continue



- Search results display any cases where there is an outstanding balance, including disposed waivable cases
- The total balance is required for cases that do not have a payment plan
- Selecting a case with a payment plan will display the case number and charges

#### **MAKE PAYMENTS – SEARCH RESULTS**



- Verify all the Search Criteria were entered correctly and in the correct format
- Verify the case is in a county that has gone live with Odyssey
- Verify the case type can be paid via Portal (probation, parole and some criminal and infractions cases, only)
- Use the Smart Search portlet to search for and verify there is a balance owed on the case

#### Step 5 Review Amount to Pay Help 1 Accepted card types included Visa, Mastercard, and Discover. A convenience fee of 2.39% will be assessed on the transaction amount. Balance Minimum Due Amount to Pay Citation/Case Number Name 50.00 Payment Plan Power, Will \$243.00 \$18.69 22IF000002-500 Power, Will \$241.00 \$241.00 241.00 \$291.00 Subtotal: Transaction Fee: \$6.95 Total Amount: \$297.95 Add Payment Details Step 6 I agree to the Terms and Conditions Add Payment Details Back

- Can be a djusted for cases with a payment plan only; Minimum Due is the lowest a cceptable a mount
- Cases without a paymentplan must be paid in full
- Vendor applies transaction fee of 2.39% of the charge amount, with a minimum fee being at least \$1 per transaction

#### Step 7 Complete the Cardholder Information form and click

Complete the	k Co	ontinue	
Transaction Summary - Total Amount After clicking Process Payment, pleas your payment is processed.	: \$297.95 se do not click the Back button, Cancel button or refresh the page. You will be automatic:	ally redirected after	
Cardholder Information Enter the information as it appears on th	1  e Cardholder Account. The fields marked with a red asterisk (*) are required fields.		
Card Type	MasterCard *		
Card Number	5454545454545454		
Exp Month	05 * Exp Year 2021 *		
CVV Code	555 * CVV Help		
Name on Card	Will Power	*	
Address Type	Maximum of 30 characters  © US ○ Foreign		
Address Line 1	123 Dev Drive Street address, P.O. box, company name, c/o	*	
Address Line 2	Apartment, suite, unit, building, floor, etc.		
City	Dallas	•	
State	TEXAS 🗸		
Zip Code	75201		
		Continue	
Cancel			

- The **☆** indicates a required field
- Acceptable card types:



#### Step 8 Verify Card Holder information and click

#### **Process Payment**

Transaction Summary - Total Amount: \$297.95

After clicking Process Payment, please do not click the Back button, Cancel button or refresh the page. You will be automatically redirected after your payment is processed.

MASTERCARD

#### Billing Detail

Card Type

 City
 Dallas

 State
 TX

 Zip Code
 75201

#### Terms and Conditions

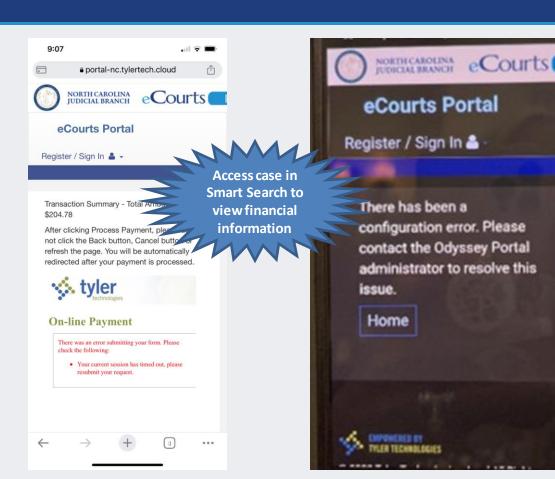
This is a confidential and secure site that does not disseminate confidential information to third parties. The effective date of the payment is the date that it is submitted. By selecting the Process Payment button you are authorizing the processing of this transaction.



#### **NOTES:**

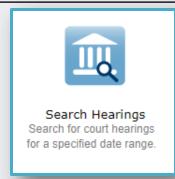
 The receipt can be printed and/or emailed after the payment has processed

#### **MAKE PAYMENTS - TROUBLESHOOTING**



- If at any point during the payment process, an error is received, verify whether the payment went through by accessing the case in Smart Search and viewing the Financial section of the Case Summary
- If the payment did not go through:
  - Verifythe Edge or Chrome Browser was being used
  - Try again, using a different device
  - Go to the Clerk of Superior Court to make the payment in person or contact the Clerk of Superior Court to request other options

#### **Step I** Click the Search Hearings Portlet on the Portal Home Page



#### Step 2 Select Location



Step 3 Select Hearing Type



- After completing steps 1-3, a Search Type must be selected. Select the Search Type below for additional steps to complete search based on Search Type:
  - o Case Number
  - <u>Party Name</u>
  - o Business Name
  - <u>Attorney Name</u>
  - Attorney Bar Number
  - o Judicial Officer
  - o <u>Courtroom</u>

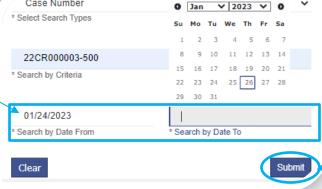
(Search Type: Case Number)

#### **Step 4** Select Case Number for Search Type **Step 5** Enter the Case Number Case Number Case Number \* Select Search Types \* Select Search Types 22CR000003-500 \* Search by Criteria \* Search by Criteria \* Search by Date From \* Search by Date To \* Search by Date From \* Search by Date To Clear Submit Clear Case Number √ 2023 ✓ \* Select Search Types

**NOTES:** 

- The \*Indicates a required field
- After Clicking Submit,
  Search Results return if
  any cases meet the
  entered parameters (see
  the <u>Search Results</u> slide for
  additional information)

Step 6
Enter the Date
From and Date
To information

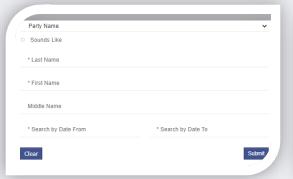


Step 7 Click Submit

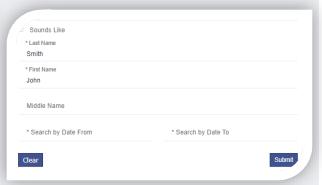
Submit

(Search Type: Party Name)

#### **Step 4** Select Party Name for Search Type

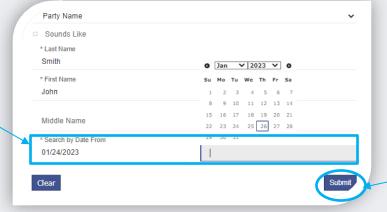


#### Step 5 Enter the Last and First Name



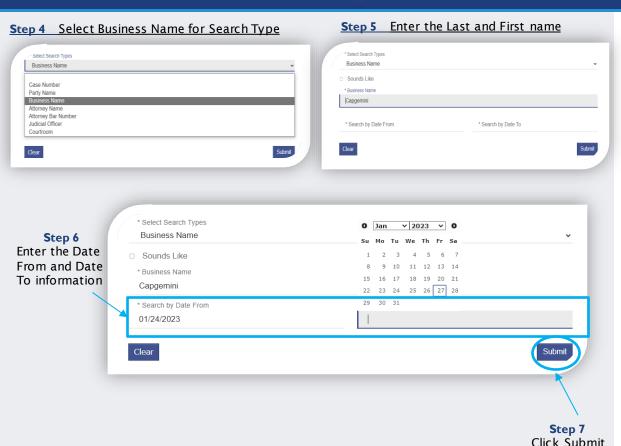
Step 7
Click Submit

# Step 6 Enter the Date From and Date To information



- The \*Indicates a required field
- After Clicking Submit,
  Search Results return if
  any cases meet the
  entered parameters (see
  the <u>Search Results</u> slide for
  additional information)

(Search Type: Business Name)



- The \*Indicates a required field
- After Clicking Submit, Search Results return if any cases meet the entered parameters (see the <u>Search Results</u> slide for additional information)

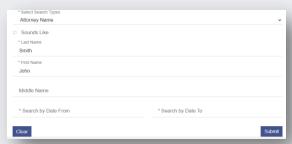
(Search Type: Attorney Name)

# Step 4 Select Attorney Name for Search Type '\*Med Search Types



\* Select Search Types

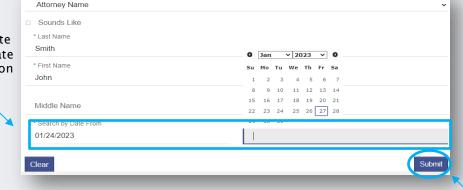
#### Step 5 Enter the Last and First name



#### **NOTES:**

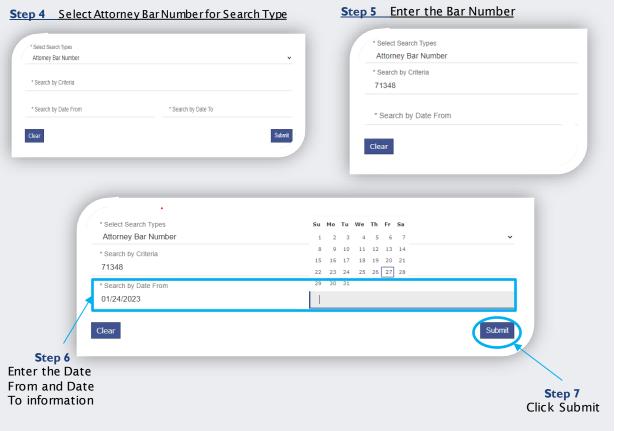
- The \* Indicates a required field
- After Clicking Submit, Search Results return if any cases meet the entered parameters (see the <u>Search Results</u> slide for additional information)





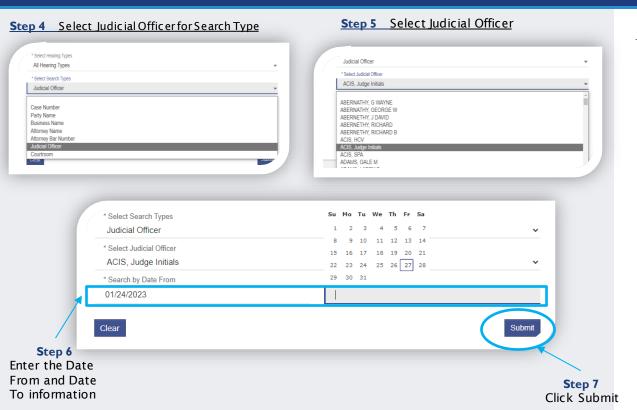
Step 7 Click Submit

(Search Type: Attorney Bar Number)



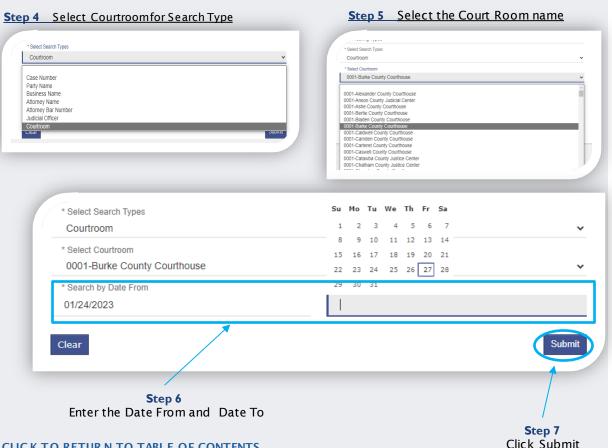
- The \*Indicates a required field
- After Clicking Submit, Search Results return if any cases meet the entered parameters (see the <u>Search Results</u> slide for additional information)

(Search Type: Judicial Officer)



- The \* Indicates a required field
- After Clicking Submit, Search Results return if any cases meet the entered parameters (see the <u>Search Results</u> slide for additional information)

(Search Type: Courtroom)



- All courtrooms within the state are listed
- For an optimal search experience, AOC recommends knowing and selecting the specific courtroom
- After Clicking Submit, Search Results return if any cases meet the entered parameters (see the Search Results slide for additional information)

#### **SEARCH RESULTS**

#### Below are examples of Hearing Search and Party Search Results









#### **NOTES:**

■ To generate a call list, ask the courtroom clerk how cases are called (oldest 1<sup>st</sup>, alphabetical, etc.) then complete a courtroom search for a single day and use the sort arrows to the right of each column header to sort the case list accordingly

#### **SEARCH HEARINGS - TROUBLESHOOTING**



#### **NOTES:**

- If the search results in a message: No hearings match your search:
  - Confirm the case number/name entered is correct
  - Confirm the case number/name entered is in the correct format
  - Confirm the case is in a county that has gone live with Odyssey
  - o The record may not exist
  - The record may be a Restricted case type and require elevated access to view

Sealed or confidential records and documents with sensitive information are not available for viewing on Portal.

