



Portal Advanced User Guide Accessing Judicial Records 07/16/2024

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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 new software 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

of NORTH BRANCH CUIQUE TRIBUE RALCOUR

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
- Juvenile 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

eCourts:	A package of new software applications and technology infrastructure improvements that will transition our court system from paper to digital.	
Portal:	The eCourts system that will replace all the legacy systems and allows users to view information via the internet, 24/7, 365.	
Portlets:	Sections on the Portal home page that allow the user to access Portal features.	די N
Case Summary aka Register of Actions:	A summary of public docket entries in public case types based upon the clerk's official record.	r
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:	Assists users in filing and serving legal documents; this system is separate from Portal	
Legacy Systems:	CCIS, ACIS, VCAP, CIPRS, Juvenile-CIPRS, Pay NC Ticket, OCAP, etc. (after go live, users in that county will have inquiry-only access).	
Anonymous Users:	Users who have NOT logged into Portal. Portal is available for all users and does not require anyone to Register, request Elevated Access or even log-in.	
Registered Users:	Users who have created an account in order to be able to save case information.	
Elevated Access:	An extra level of access which users must request and be granted by the AOC Portal Team, in order to be able to access information on Portal which may be otherwise statutorily restricted.	
Restricted Information:	Specific data and documents that cannot be made public and/or available via the internet, per statute.	
Restricted Case Types:	Case types that are statutorily protected from being available publicly.	
Personally Identifiable Information (PII):	Information that is considered private and must be restricted.	

### **NOTES:**

 The Register of Actions is NOT the official court record

### **ACCESSING PORTAL**



### **REGISTERING IN PORTAL**

(Not required for attorney users)

Step I         On the Portal Home Page, click         Register / Sign In 4 - choose Register	NOTES:
Step 2         Complete the Registration Form	Portal can be used
Step 3Check your email account for a message from No_Reply@tylerhost.net, and click link to complete activate your account.	without registering (anonymous user)
Registration Form       First Name       Last Name       Email Address       Username       Password       Registration Complete	<ul> <li>Users can Register to create personal account</li> </ul>
Mobile Phone (Numbers Only)         Select Service Provider         Select Security Question 1         Select Security Question 2         Select Security Question 3	<ul> <li>Users can request Elevated Access to view additional information as entitled by statute</li> </ul>
Please retype the characters       No Reply: Confirm Your Email Informed Please retype the characters         Next       Cancel         Mary-Test Active-eWarrants,         Your registration request has been received. Please visit the <u>eCourts Portal</u> site to activate your account.         The link provided will only be valid for 10 days. You must validate the email address within those 10 days to confirm your registration.         If you have received this email in error, please disregard.         (*, Reply)       (*, Reply all)	<ul> <li>Registered and Elevated Access users will have a My Cases portlet where they can save cases of interest</li> </ul>

### SIGNING INTO PORTAL

	Step I	Once you have variable variabl	alidated your account Click the Log In button to complete your
	Step 2	Enter the email a	ddress you Registered with > enter your password > click <b>Sign In</b>
	Step 3	If elevated access prompts Otherv	s is needed, select your role and complete the vise click the Home button
Em	nail Validation		
Mary	-Test Active-eWarrants	s, your account is now validated!	
	Log In	Please sign in	to continue
		Email	
		ncecourtsportal+1	@gmail.com
		Password	
		Sign In	Request Access If you are eligible for access to additional features, select your role and complete the prompts. You can request access to a role at any time from the Welcome menu.
		Forgot Password?	
			Select Your Role

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

### SIGNING INTO PORTAL

Step		On the Portal Home Page, click Register / Sign In 🛎 - and choose Sign In	NOTES:
Step	2	Enter the email address you Registered with > enter your password > click <b>Sign In</b>	<ul> <li>Portal can be used</li> </ul>
Step	3	Below is a diagram of the dashboard, for Registered and Elevated access users, with the different areas labeled which are used throughout this training material.	without signing in (anonymous user)
eCourts Portal	_	Welcome, Mary 🛔 -	<ul> <li>Registered and</li> </ul>
		eCourts Portal 7/25 Update: Use CASE NUMBER to search divorces in Judgment Search. 6/13 Error 602 appears after viewing a case from My Cases Portiet and accessing a document. Current work around is to open documents through Smart Search. FAQ 4/28 Portal NC JUDGMENT SEARCH references the amounts and totals owed based on the original Judgment date. Please contact your county Client of Clount for the current amounts and totals owed. Portal Training Materials and Reference Guides Need Heip? Contact the Client of Court in the County where the case is assigned. Email the eCourts team (ecourts@nccourts.org) or call the Heip Desk (16)-8400-2407, "PORTAL WORKS BEST WITH CHROME OR EDGE BROWSERS" "How To" Videos on You Tube!	Elevated Access users will have a My Cases portlet where they can save cases of interest
		Smart Search Search for coult records and case information.     Search Hearings Search for count dates / hearings by name, county, date range, and more.     NC Judgment Search by Dudgment Search Search the indgment index, to kew Items, in accordance with NCGS TA- 109(b)(6).     My Cases View previously saved cases.	

### **MY CASES**



# **Elevated Access**

Available for users with a verified business need and authority granted by statute to view generally restricted case information and nonpublic 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.

# Who can apply for Elevated Access?

#### Active eWarrant User

- Any LEO or administrative support who is <u>statutorily</u> <u>permitted</u> to view Warrants Unreturned
- Registration with Agency email required!

### Government & Domestic Violence Agencies

 Any government agency employee who has DCIN certification and a verifiable business need for PII

 Any domestic violence agency 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
- Juvenile
- DSS Social Worker
- Juvenile Court Counselor
- Special Proceeding Confidential (SPC) Respondent



NOTES:

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

# Reasons for being denied Elevated Access:

# Non-Attorney

Active eWarrants User Only: Requester must register and request Elevated Access with his/her federal, 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 users will be notified via email from Portal

# Reasons for being denied Elevated Access:

# Attorney

- •<u>AOC-A-264 Form</u> 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 <u>ecourts@nccourts.org</u> or by calling the NCAOC Help Desk at (919) 890-2407.
- Only one Elevated Access request can be accepted per filing. 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 users will be notified via eCourts File & Serve



click Submit			NOTES:
Smart Search earch Criteria 23IFf000022-420	*Required		<ul> <li>Smart Search is for ALL Odyssey implemented counties. Court records from counties not using Odyssey do not return</li> </ul>
Clear			
Advanced Filtering Options -	Dagic Slakch		
	RECORD NUMBER		
	Smart Search	*Required	
	Search Criteria	2	
	Smith, John		Sealed or confidential records and documents
	Clear	Submit	with sensitive information are not available for
	Advanced Filtering Options -		viewing on Portal.

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Cases							
<u>Case Number</u> ¥	<u>Style / Defendant</u>		✓ <u>Status</u>	✓ Location		✓ Party Name	✓ Party
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Darty C	oarch Do	oulto					Prin
Party So	earch Re	SUILS	urtu namo	but could have returned more. Pla	aco parrow the coarch	by entering more precise criter	
The searchite	turrieu 200 case	s that have been grouped by pa	irty name,	, but could have returned more. He	ase narrow the search	by entering more precise criter	na.
Name					✓ Date of Birth		
Name	H, JOHN				✓ Date of Birth		
Name SMITH	H, JOHN				♥ Date of Birth		Cases (1)
Name SMITH	н, јони				✓ Date of Birth		 <u>Cases (1</u> )
Name SMITH Cases Case N	H, JOHN	Style / Defendant	~	Status	<ul> <li>Date of Birth</li> <li>Location</li> </ul>	✓ Party Name	Cases.(1)
Name     SMITH     Cases <u>Case N     18CVE </u>	H, JOHN	Style / Defendant HARNETT CO OBO VS JOHN SI	<b>~</b> MITH	Status Disposed - Final Judgment No Tri	Date of Birth     Location     Harnett Distri	✓ Party Name et Court SMITH, JOH	Cases_(1) <u>Party_Type</u>
Name SMITH Cases Case N 18CVC	H, JOHN	<u>Style / Defendant</u> HARNETT CO OBO VS JOHN SI	✓ MITH	<u>Status</u> Disposed - Final Judgment No Tri	Date of Birth     Location     Harnett Distri	✓ Party Name ct Court SMITH, JOH	Cases (1) : <u>Party Type</u> N Defendant
Name SMITH Cases <u>Cases</u> <u>18CVD</u>	H, JOHN	Style / Defendant HARNETT CO OBO VS JOHN SI	<b>~</b> MITH	<u>Status</u> Disposed - Final Judgment No Tri	Date of Birth     Location     Harnett Distri	✓ Party Name ct Court SMITH, JOH	Cases (1) : <u>V Pariy Type</u> V IN Defendant
Name SMITH Cases Cases № 18CVC	H, JOHN Number 🗸	<u>Style / Defendant</u> HARNETT CO OBO VS JOHN SI	<b>↓</b> MITH	<u>Status</u> Disposed - Final Judgment No Tri	Date of Birth     Location     Harnett Distri	✓ Party Name ict Court SMITH, JOH	Cases (1) : <u>Party Type</u> IN Defendant
<ul> <li>Name</li> <li>SMITH</li> <li>Cases</li> <li>Case №</li> <li>18CVC</li> <li>SMITH</li> <li>Current</li> </ul>	H, JOHN Number  CO02074-420 H, JOHN ent Address:	<u>Style / Defendant</u> HARNETT CO OBO VS JOHN SI	<b>∽</b> MITH	<u>Status</u> Disposed - Final Judgment No Tri	Date of Birth     Location     Harnett Distri	✓ Party Name ct Court SMITH, JOH	Cases (1) :      Party Type     M     Defendant     Cases (1)
Name     SMITH     Cases     Cases     18CVC     SMITH     Curre     985 A     COAT	H, JOHN Number  CO02074-420 H, JOHN H, JOHN H, JOHN	<u>Style / Defendant</u> HARNETT CO OBO VS JOHN SI	∽ MITH	<u>Status</u> Disposed - Final Judgment No Tri	Date of Birth     Location     Harnett Distri	✓ Party Name ct Court SMITH, JOH	Cases (1) :
<ul> <li>Name</li> <li>SMITH</li> <li>Cases</li> <li>Case 1</li> <li>18CVI</li> <li>SMITH</li> <li>Curre</li> <li>985 A</li> <li>COAT</li> <li>Cases</li> </ul>	H, JOHN Number V D002074-420 H, JOHN ent Address: ABATTOIR ROAD S's, NC 27521	<u>Style / Defendant</u> HARNETT CO OBO VS JOHN SI	<b>~</b> MITH	<u>Status</u> Disposed - Final Judgment No Tri	Date of Birth     Location	✓ Party Name ct Court SMITH, JOH	Cases (1) Party Type  IN Defendant Cases (1)
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CLICK TO RETURN TO TABLE OF CONTENTS

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- 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



#### **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

#### Step 3 Select your Advanced Filtering Search Criteria Options **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 Odyssey. 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.)
  - $\circ$  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.

	Party Search Criteria		NOTES:
	Search by		
	Party Name	Business Name	
	Nickname		
	<ul> <li>Sounds Like</li> </ul>		
	Filter by Date of Birth From	Filter by Date of Birth To	
ilter by Dat	e of Birth From	Filter by Date of Birth To	
6/30/197	0	06/30/1970	
-			
s Scr	oll down and click Submit		
5 Scr	oll down and click Submit		
5 Scr	oll down and click Submit		

#### Search Results will display based on entered Name and Date of Birth Step 6 Party Search Results ✓ Date of Birth Name SMITH, JOHN BLAIR XX/XX/1970 Race White Male Cases Style / Defendant Party Name Case Number $\mathbf{v}$ Status Location 20CR713175-910 SMITH, JOHN BLAIR Wake District Court SMITH, JOHN BLAIR Disposed SMITH, JOHN BLAIR Disposed Wake District Court SMITH, JOHN BLAIR 17CR748480-910 02CR046021-910 SMITH, JOHN BLAIR Disposed Wake District Court SMITH, JOHN BLAIR 00CR048571-910 SMITH, JOHN BLAIR Disposed Wake District Court SMITH, JOHN BLAIR

- 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

#### Select a Case Type from the Filter by Case Type Drop Down Step 7 NOTES: Filtering by Case Type does NOT narrow the Case Search Criteria Case Status selections Filter by Case Type **The Case Type filter** A crosswalk list of Case • can be used to find All Civil, Family, and Probate Public Case Types Status by Case Type cases indexed All Public Records follows on slides 14-23 Bond Forfeitures according to NCGS Civil Actions § 7A-109(b). Civil/Family/Probate(excluding Summary Ejectment) Criminal and Infraction Estates Step 8 Based on the selected Case Type, select the appropriate Case Status Case Search Criteria Filter by Case Type Special Proceeding (non-confidential) Filter by Case Status **Selecting a Case** Disposed - Clerk of Superior Court Status, which is not Disposed applicable to the Disposed - Clerk of Superior Court Disposed - Discontinued Case Type, will Disposed - Dismissal on Order of the Court Disposed - Final Judgment No Trial lead to incomplete Disposed - Other search results. Disposed - Post Disposition Activity

2

Case Status Civil Actions

### Choose Case Type

1

Bond Forfeiture Civil Foreclosure (CV) Civil Foreclosure (M) Civil General Civil Magistrate Confession of Judgment Non-Domestic Restraining Orders Summary Ejectment

### **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
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

2

Case Status

### **Civil Actions Continued**

### **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

### 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
Transfer of SPC file
Transfer to Another County
Transferred to Superior Court
Trial De Novo
Unserved

2



Choose Your Case Type

**Bond Forfeitures** 

1

CLIC

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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
ncompetent to Stand Trial (Incapable to Proceed)
npatient Involuntarily Committed
Not Guilty by Reason of Insanity
Dutpatient Commitment Dangerous
Pending
Removal of Mental Health Bar
Reopened
Small Claims Appeal
Stayed
Substance Abuse Commitment
Transfer of SPC file
Fransfer to Another County
Fransferred to Superior Court
Frial De Novo
Jnserved
SPC Index Conversion



## **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

#### 2 **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 - 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 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** 

### 2 **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 Registration

## Choose Your Case Type

Registration

1

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
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

2

# Case Status

### **Special Proceeding**

### **Choose Case Type**

Foreclosure (Special Proceeding)

Incompetency

1

Name Change

**Special Proceeding** 

### Choose Case Status

Active Reopened Adjudicated Incompetent Closed Disposed - Clerk of Superior Court **Disposed - Discontinued** Disposed - Dismissal on Order of the Court **Disposed - Final Judgment No Trial 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 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

2



**Special Proceeding Continued** 



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

2

# Case Status

### Wills Deposited for Safekeeping

Choose Case Type

Wills Deposited for Safekeeping

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
iled
ncompetent to Stand Trial (Incapable to
Proceed)
npatient Involuntarily Committed
Not Guilty by Reason of Insanity
Dutpatient Commitment Dangerous
Pending
Remanded
Removal of Mental Health Bar
Substance Abuse Commitment
ransfer of SPC file
ransfer to Another County
ransferred to Superior Court
Will/Codicil for Safekeeping Withdrawn
SPC Index Conversion

Step 9 Click Subline	N (	DTES
Case Search Criteria		
Jase Gealuli Olitella		
Filter by Case Type		
Special Proceeding (non-confidential)	· · · ·	
Filter by Case Status		
Disposed - Clerk of Superior Court		
Completed	A	
Disposed		
Disposed - Clerk of Superior Court		
Disposed - Discontinued		
Disposed - Dismissal on Order of the Court		
Disposed - Final Judgment No Trial		
Disposed - Other		
N IN W VICE	·	
	Submit	

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

Cases					
Case Number 💙 Style / Defendant	✓ <u>Status</u>	<ul> <li>Location</li> </ul>	Y Party Name	Y 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**



Advanced Filtering

#### **NOTES:**

\*Required

\*Required

2

\*Required

The Advanced

Options can

help narrow

Filtering

wild card searches. 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)

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.

The search returned 200 cases that have been grouped by party name, but could have returned more. Please narrow the search by entering more precise criteria.

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



#### NOTES:

- More information on e-Courts Name Indexing Standards can be found <u>here</u>
- When searching 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

· JONES, JENNIFER		
Current Address: 234 ROYAL TOWER WAY CARY, NC 27513		Cases.(1)
Cases		
Case Number V Style / Defendant V Status	Location     Wake Clerk of Superior Court	Party-Name     Party-Type     Party-Type     Party-Type
DEED OF TRUST JENNIFER JONES	wake clerk of Superior Court	JONES, JENNIER Delendant
<u>Case Number</u> ✓ <u>15SP001542-910</u>		
Step 2 Register of Actions will d	isplay	
→ Case Summary		
	Wake Clerk of Superior Court	
	Case Summary	
	Case No. 155P001542-910	
IN THE MATTER OF THE FORECLOSURE OF A DEED OF TRUST JENNIFER JONES	ş ş ş Micro	Location: Wake Clerk of Superior Court Filed on: 06/02/2015 film 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
  - Family
  - Probate/Mental Health
- The Hearings and/or Financial Information sections display when there is information to display

### NO CASES MATCH YOUR SEARCH



#### **NOTES:**

- Verify the 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.



### 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	Т		Wildcard	Results are returned where first name starts
			Snyder, T*	with "T"
Snyder	т		Wildcard	Results are returned where last name start
			Sny*, T*	with "Sny", and first name start with "T"
Snyder	т		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			
				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

25099

1020

Filter Results Clear

Granted In Whole Or Part

Judgment Type

Historical

Relevance 
Search Results (1 - 10 of 42069) (Page: 1)

Location

Mecklenburg

SMITH, DEVERA S

Case Number

97CVD016611-590

#### **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.

View Judgment

Recorded  Sentence Type	5506		earch	Results (1	- 10 of 4200	69)
Active	3471	Case Number		× ×		
Community	2228	9/04/00/10011-30-	Court			
Conversion	3063	SMITH DEVERA	s			View Judgment
Deferred Prosecution	0	Case Number	Location	ludament Tuno		
C Fine	0	97CVD016611-590	Mecklenburg District	Granted in Whole or Part		
More						
Location		SMITH, DEVERA	S.			View Judgment
Harnett District Court	2478	Case Number 97CVD016611-590	Location Mecklenburg District	Judgment Type Granted in Whole or Part		
Harnett Superior Court	348		Court			

Judgment Type

Granted in Whole or Pa



- 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



#### **NOTES:**

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



CLICK TO RETURN TO TABLE OF CONTENTS

#### **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 3 Enter the Required Fields and click Submit	NOTES:
	<ul> <li>The * indicates a required field</li> </ul>
Make Payments * Required	
Basic Search Options	
* Select Search Type	
Party Name V	
* Search by Last Name * Search by First Name	
Power Will	
* Search by Date of Birth (mm/dd/yyyy)	
Search by Middle Name 01/01/1976	
Submit	

Searc	h Results			
	Citation/Case Number	File/Citation Date	Name	Balance
	22IF000001-910	12/21/2022	Power, Will	\$266.0
۲	22IF000002-500 20-158(B)(1)(3) - FAIL YLD STOPS	12/21/2022 IGN/FLSH RED LGT	Power, Will	\$241.(
	22IF000002-420	12/21/2022	Power, Will	\$154.
	Payment Plan The minimum payment due includes 23CR000003-910 - 1/3/2023 20-7(A) - NO OPERATORS LICENS	the sum of any prior outstanding payments SE	Power, Will	\$243.(
M 4 1	1 ► ► 25 ▼ items per page	e		1 - 4 of 4 items
			Subtotal:	\$484.
			Transaction Fee:	\$11.
			Total Amount:	\$495.
				o

- 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

eCourts Portal		Register / Sign In 🌡
	Make Parments Search Results	
		Print
	Search Results	
	2	
	There are several reasons your citation/case might not appear, even if you entered it correctly. Your citation/case may: Require a court appearance. Not have been entered into the system yet. Data. Entry Error.	
	If you cannot find your Citation/Case, it is your responsibility to make timely payments at the courthouse. You should direct questions about your citation to the Clerk of Superior Court in the county in which the citation was issued.	

- 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

				Help
Accepted card types included Visa,	Mastercard, and Discover. A convenience f	ee of 2.39% will be assessed or	n the transaction amount.	
Citation/Case Number	Name	Balance	Minimum Due	Amount to Pay
Payment Plan	Power, Will	\$243.00	\$18.69	\$ 50.00
22IF000002-500	Power, Will	\$241.00	\$241.00	\$ 241.00
			Subtotal:	\$291.00
			Transaction Fee:	\$6.95
			Total Amount:	\$297.95
- (		_		
p o			Add Payment Deta	llis
	onditions			
I agree to the Terms and C				
I agree to the Terms and C				
l agree to the Terms and C			Add Payr	nent Details

- Can be adjusted for cases with a payment plan only; Minimum Due is the lowest acceptable amount
- Cases without a payment
   plan 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 7Complete the Cardholder Information form and click

Enter the information as it appears on the Cardholder Account. The fields marked with a red asterisk (\*) are required fields.

545454545454545454

 $\sim$ 

\* Exp Year 2021

MasterCard

05

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

Transaction Summary - Total Amount: \$297.95

your payment is processed.

Card Type

Card Number

Exp Month

### Continue

- The indicates a required field
- Acceptable card types:





Warning! Do not click the

back button after clicking Process Payment

Process Payme

Transaction Summary - Total A	mount: \$297.95	
After clicking Process Payment your payment is processed.	, please do not click the Back button, Cancel button or refresh the page. You will be automatically redirected after	
Billing Detail		
Card Type	MASTERCARD	
Card Number	*************5454	
Exp Date	05/23	
CVV Code	111	
Name on Card	Will Power	
Address Type	US	
Address Line 1	123 Dev Drive	
Address Line 2		
City	Dallas	
State	TX	
Zip Code	75201	
Terms and Conditi	ons	

#### **NOTES:**

ceipt can be printed emailed after the nt has processed

### **MAKE PAYMENTS - TROUBLESHOOTING**



eCourts Portal Register / Sign In &

There has been a configuration error. Please contact the Odyssey Portal administrator to resolve this issue.

Home

- 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:
  - Verify the Edge or Chrome Browser was being used
  - Try again, using a different (Windowsbased) 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



(Search Type: Case Number)



## 59

(Search Type: Party Name)



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

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

(Search Type: Business Name)

Submi	Dustries rearine Sounds Like * Business Name Daggemini * Search by Date From Clear	* Search by Date To
Strif	Search by Date From  Clear	* Search by Date To
Sidmi	Cegremin * Search by Date From Clear	* Search by Date To
Sidmit	* Search by Date From Clear	* Search by Date To
Stort	Clear	
Submi	Clear	
* Select Search Types	0 Jan × 2022 × 0	
Business Name	Su Mo Tu Wo Th Fr Fo	~
Sounds Liko	1 2 3 4 5 6 7	
* Business North	8 9 10 11 12 13 14	
- Business Name	15 16 17 18 19 20 21	
Capgernini	22 23 24 25 26 27 28	
* Search by Date From	29 30 31	
01/24/2023		
Clear		Submit
		Step
	* Select Search Types Business Name Sounds Like * Business Name Capgemini * Search by Date From 01/24/2023 Clear	* Select Search Types Business Name Sounds Like * Business Name Capgemini * Search by Date From 01/24/2023 Clear * Clear * Select Search Types * Search Types * Search By Date From Clear * Search By Date From * Sear

CLICK TO RETURN TO TABLE OF CONTENTS

- 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)

* Select Search Types Attorney Name			
		* Select Search Types Attorney Name	
0 N		<ul> <li>Sounds Like</li> </ul>	
Party Name		* Last Name	
Jusiness Name		Smith	
Attorney Bar Number Judicial Officer		* First Name	
Courtroom		John	
Middle Name		Middle Name	
* Search by Date From	* Search by Date To	* Search by Date From **	Search by Date To
Henr	Sidemi		
	JUMI	Clear	Subm
	* Select Search Types		
	Attorney Name		~
Step 6	<ul> <li>Sounds Like</li> </ul>		
Enter the Date	* Last Name		
Enter the Date	Smith		
From and Date		0 Jan 💙 2023 🌱 0	
To information	* First Name	Su Mo Tu We Th Fr Sa	
	John	1 2 3 4 5 6 7	
		8 9 10 11 12 13 14	
	Middle Neme	15 16 17 18 19 20 21	
		22 23 24 25 26 27 28	
X .	* Search by Date From	29 30 31	
	01/24/2023		
	Clear		Submit
			Stop 7
			JIED /

- 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 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 <u>Search Results</u> 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 <u>sort arrows</u> to the right of each column header to sort the case list accordingly

### **SEARCH HEARINGS - TROUBLESHOOTING**

eCourts Portal	
	Search Hearings Search Results
	Hearing Search Results Hearings for Case Number 23JB000041-910 between 8/1/2023 and 8/31/2023
	No hearings match your search.

#### 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
  - 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.

