

## How to Use Filevine for SCS Appeals

## To Register for Filevine

Welcome to Filevine! As a new user, click Sign in to Filevine.



A new window tab should open with the following screen. Click Activate Account.

Account Confirmation
Please click "Activate Account" to finish

Create a login then click **Reset Password**.



This screen will follow. Click Sign In.



You will be brought back to the Sign In screen. Enter your new credentials, then click **Sign In** again. You will be brought to your **Feed** page, which will show you any notes or tasks that have been assigned to you through all of Filevine for any and all cases you are party to with Appeals.



Before you begin, go the Menu and click **Setup**.



Under the **Immediate** tab, we recommend selecting all. The **Daily** and **Configure Notification Methods** tabs can be completed however you feel appropriate.

Next, click Notifications.

Immediate	🛗 Daily	Configure Notification Methods		
Email	Notify me immediately of			
	Selec			
	Each	task that gets assigned to me		
	Each	task that gets assigned to me for projects I follow		
<b>~</b>	Each	incoming text to Mailroom		
✓	Each	incoming text to projects that I follow		
~	Role	Role-based taskflow notifications		
✓	Each	Each incoming fax to Mailroom		
✓	Each	incoming fax to projects that I follow		
✓	Each	note where I am mentioned		
	Each	note that I am mentioned on for projects I follow		
✓	Each	time I am made a follower on a project		
✓	Phas	e changed on a project I follow		
✓	Each	failed fax on projects I follow		
	Each	failed fax sent by me		
<b>~</b>	A Re	port Fusion I generated has completed		

Once this is completed, go back to your **Feed** page. If there is nothing in your **Feed**, you can start typing the caption of the appeal in the **Search** box and it will appear as below:



Click on the appeal. This will bring you to the **Activity** page for this particular appeal.



This is where you will see any notes and tasks in which you are tagged. You can also enter notes here, which we encourage you to do when uploading documents (more on this later).

Next, access the **Documents** section.

JD John Doe	vs. LDAF, Docket# 18802		
	Filter docs	x Q Search Deeper	
Activity     Appeal	Louisiana State Civil Service > John Doe va. LDAF, Docket# 18802 +		h ± 0
S Documents			
		This folder is empty Drop files here to add them	

Here, you will be able to upload documents, pleadings, etc. for the Referee's review, as well as view documents that are shared with you.

## TO UPLOAD A DOCUMENT:

Drag files from your computer drive to the folder, OR

Click the **Upload files** button on the far right-hand side.



The following pop-up will appear. Click **Add Files** and select the appropriate files you wish to upload. Then, click **Close**.

	Upload ×	
	Upload Location John Doe vs. LDAF; Docket# 18802	
	Drop files here	
Louisiana State Civil Service > John Doe va. LDAF. Docket# 18902 ~	Q South Deeper In Most Recent 12 Name	!
		h ± 0
Capture_PNG		me (33.01 K8) Mar 31, 2022

After the document uploads and appears in the **Documents** folder, click on the banner containing the document name.

Click the **Document Options** button and select **Note This**.



The following pop-up will appear:

	for 'John Doe vs. LDAF, Docket# 18802'	
😮 🖻 Cap	ture.PNG 🗸	
Save	<u>+</u>	
Preview	Posted by you on 3/31/2022	
	Recent Activity	

Here, please state the title of the document and tag the Referee in the textbox.

```
Marty Mansfield = @marty
```

## Brent C. Frederick = @brent2

Your screen should look similar to below:

reate Note fo	or 'John Doe vs. LDAF, Docket# 18802'	
Screen	shot for your review @marty	
😮 🖻 Captu	re.PNG 🗸	
Save	We'll make this a task for Marty Mansfield.	
Preview	Screenshot for your review @marty Posted by you on 3/31/2022 Capture PNG Recent Activity	
		Cancel

Once this is completed, click **Save**. You can then go back to the **Activity** page and confirm that your document was successfully uploaded and assigned to the Referee.