

How To Change a Case Filing Type (You will need certain permissions to completed this action)

1. Navigate to the Case Filing Ledger section at the bottom of the Case Details screen and select the filing type that needs to be changed.

Case Filing Ledgers

Date	Type
2/17/2000	Civil: Real Property / Quiet Title

Change Case Number

2. This will take you to the Case Filing Ledger screen. From here, navigate to the bottom of the Ledger and look for the “Change Filing Category” button. This will give you a drop down of the Case Filings you have to choose from.

Ledger Clear All Select All

		Date	Category	Sub-Category	Memo
☐	•	02/17/2000	Imported Costs	County Filing Fee	PET NAME CHANG
☐	•	02/17/2000	Imported Costs	Automation Fee	AUTOMATI
☐	•	02/17/2000	Imported Costs	County Filing Fee	NOTAR
☐	•	02/17/2000	Imported Costs	State Tax	TAX ON NAME CH
☐	•	02/17/2000	Imported Costs	JCS / ATJ	JCP 5.00-VOID
☐	•	02/17/2000	Imported Costs	County Filing Fee	ORDER 14.00-VO
☐	•	02/17/2000	Imported Costs	Automation Fee	AUTOMATION FEE
☐	•	02/17/2000	Imported Costs	County Filing Fee	COMPLAINT

Transfer to Accounts **Undo Transfer** **Delete Row**

Change Filing Category ▼

Move Selected Deposit To Filing: ▼

3. Once the correct Filing type is selected, the “Change Filing Category” button will update to read “Update Filing Category”. Clicking this button will change the filing type of the case.

☐	•	02/17/2000	Imported Costs	County Filing Fee	ORDER 14.00-VOID_AMOUNT
☐	•	02/17/2000	Imported Costs	Automation Fee	AUTOMATION FEE 5.00-VOID_
☐	•	02/17/2000	Imported Costs	County Filing Fee	COMPLAINT FILED

Transfer to Accounts **Undo Transfer** **Delete Row** **Balance**

Update Filing Category **Civil: Contract** ▼

Move Selected Deposit To Filing: ▼

4. After you change the Case Filing type, make sure the costs on the ledger screen are correct for that particular filing type.