

How To Consolidate Cases

Pre-Requisites

Start by launching CountySuite Civil Court.

Step-by-step

1. Enter the Case Number of the TARGET case (or LEAD case), click the Search button, and then go to that case. This is the case which will contain all future actions.

The screenshot shows the CountySuite Civil Court interface in a Windows Internet Explorer browser window. The title bar reads "CountySuite Civil Court - Windows Internet Explorer". The page header includes the CountySuite CIVIL COURT logo and the text "LANCASTER COUNTY PROTHONOTARY'S OFFICE". Navigation tabs include "Receiving", "Contacts", "Accounts", "Check Out Log", "Scheduled Events", and "Reports". A search bar is labeled "Search for a Case" with a link to "Show Advanced Options". Below the search bar, a dropdown menu is set to "Search by Name or Case Number" and the text "CI-14-02222" is entered. A table displays the search results:

Case Number	Case Participants	Case Category	Opened	Status	...
CI-14-02222	PLA: COOPER PRINTING INC DEF: WOLFORD, CHEENA	CIVIL: COMPLAINT	3/17/2014	OPEN	

2. At the top of the Case Details page, click the Maintenance button.

The screenshot shows the "CASE DETAILS" page for case "COOPER PRINTING INC vs. CHEENA WOLFORD" with case number "CI-14-02222". The title bar reads "CountySuite Civil Court - Windows Internet Explorer". The page header includes the CountySuite CIVIL COURT logo and the text "CASE DETAILS". Navigation tabs include "Close", "Ledger", "Attachments", "Check Out Log", "Scheduled Events", "Maintenance", "Forms", and "Print Dockets". The "Maintenance" tab is selected. The page displays the case title "CIVIL: COMPLAINT - DECLARATION OF TAKING". On the right, there are fields for "Date filed:" (03/17/2014 12:37 AM) and "Date closed:" (empty). The "Status:" is "OPEN" in a green box.

3. Enter the Case Number of the SOURCE case, and click the Search button. This is the case that will be consolidated INTO the TARGET case. The SOURCE case will no longer receive entries. All action will take place in the new TARGET (LEAD) case.

The screenshot shows the "CASE MAINTENANCE" page for case "CI-14-02222". The title bar reads "CountySuite Civil Court - Windows Internet Explorer". The page header includes the CountySuite CIVIL COURT logo and the text "CASE MAINTENANCE". A "Close" button is visible. The "Case Consolidation" section is active. It shows "Target Case Number: CI-14-02222". Below this, there is a field for "Source Case Number:" with a search icon and a "Consolidate" button.

- The search results will show any cases that match the search criteria. Click on the row in the search results, and the page should return the details of the SOURCE case for preview. PLEASE MAKE SURE THIS IS THE CORRECT CASE.

CountySuite Civil Court - Windows Internet Explorer

CountySuite™ CIVIL COURT **CASE MAINTENANCE** Itg | Home CI-14-02222

Close

Case Consolidation

Target Case Number: CI-14-02222

Source Case Number: CI-14-02224

Search Results

Case Number	Participants
CI-14-02224	PLA: WELLS FARGO FINANCIAL, INC. DEF: KREIDER, SHAWN

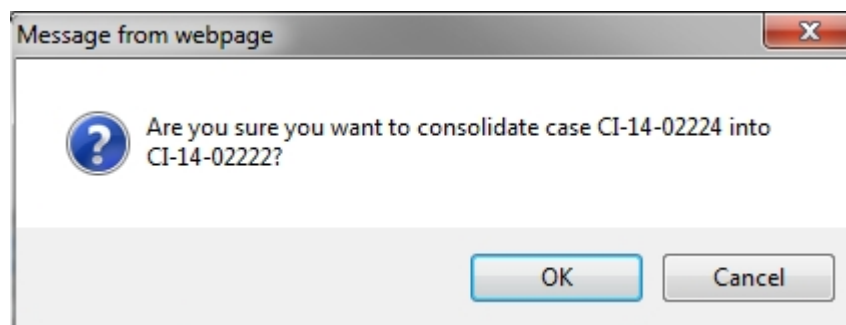
Case Participants

Case Participant	Category
WELLS FARGO FINANCIAL, INC.	Plaintiff
AUTOVEST LLC	Plaintiff
FULTON FIEDMAN & GULLACE LLP	PLAINTIFF LAW FIRM
RENEE MARTIN	Defendant
MICHAEL B VOLK	ATTORNEY FOR PLAINTIFF
SHAWN KREIDER	Defendant

Requests

Date	Type	Description
3/17/2014 3:15:00 PM	CIVIL: CONTRACT	

- If the information looks correct, click the “Consolidate” button to merge the cases. The application will prompt the user to verify this action.



6. At this point, the following actions should occur:

- o The most recent docket entry in the SOURCE case will be copied to the TARGET case, along with any attachments to that docket entry. (This should be the Order for Consolidation.)
- o The rest of the docket entries will be moved to the TARGET case, along with their scanned images.
- o Any Scheduled Events that occur in the future will be moved to the TARGET case.
- o Any Checkout Log entries that are active (ie. the folder is still checked out) will be moved to the TARGET case.
- o The Case Number of the TARGET case will be inserted into the Reference Number field of the SOURCE case.
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- o The Notes field in the TARGET case will say "<Source Case #> was consolidated into this case".
- o The Notes field in the SOURCE case will say "This case is consolidated into <Target Case #>"
- o Any additional contacts in the SOURCE case (that are not in the TARGET case already) will be added to the TARGET case (along with all attorney relationships)
- o The AOPC Disposition on the SOURCE case will be set to "H – Other"
- o NO Judgments will be moved (or copied) from the SOURCE case to the TARGET case
- o NO Filing Ledgers will be moved (or copied) from the SOURCE case to the TARGET case

Follow-up

1. Click the Close button at the top of the page to return to the TARGET case page and verify that the consolidation action completed successfully.
2. Return to the Home page (click Home in the upper-right of the page header), look up the SOURCE case, and verify:
 - o That the Docket Entries have been moved, except for the Order for Consolidation
 - o That the TARGET Case Number is in the Reference Number field
 - o That the Notes field indicates that the case was consolidated into the TARGET case