

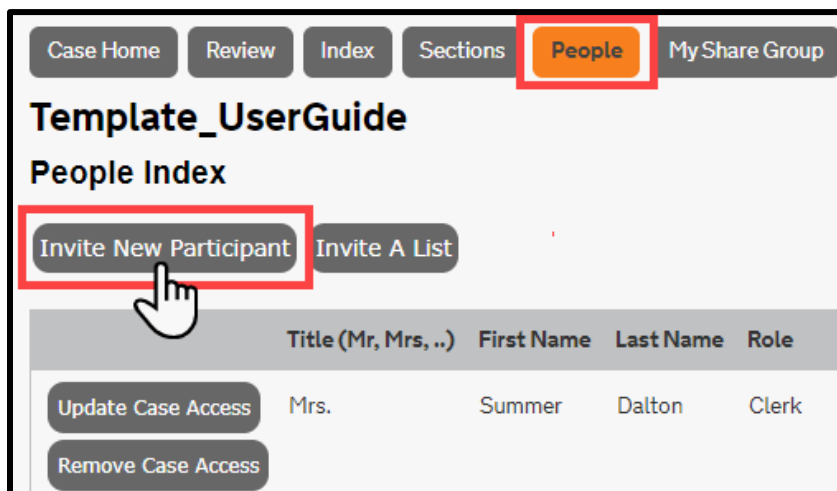
Digital Evidence

Invite a New Participant (Public Users)

Parties, Attorneys, Law Office Staff, and Court/Clerk Staff will only have access to cases that they have been invited into. Only users that have been granted access permission to Invite People will have access to the People tab and will be able to invite additional people into a case.

As a case progresses, the court/clerk will provide the attorney of record or a self-represented litigant with access to additional hearing/trial bundles (*or the court will create a new case in the portal*). When the court/clerk provides a user with access to a new/additional bundle and the user had previously invited others into the case, the user will be able to [provide those users with access to the new bundle](#).

1. Log in to portal > Locate Case > Select **Update Case** > Select **People tab**



- a. Select the **Invite New Participant** button to add a person to the case
- b. Select the **Invite A List** button to invite a group of people into a case
 - i. To use this function, an Invite List must exist
 - ii. If there is a need to create an Invite List, view the **How to Create an Invite List** document available at: <https://www.azcourts.gov/digitalevidence/Training/Attorney-and-Self-Represented-Litigants>
- c. A person or an Invite List must be added to the case **one at a time**, and the process must be repeated when adding multiple people and/or lists (*three screenshots below*)

Case Home Review Index Sections **People** My Share Group B

Template_UserGuide

Invite A New Case Participant

Instructions

Person's Email *

This email is OK. Choose a role

Role

Attorney

Interested Party

Law Enforcement


Law Office Staff

Litigant Represented by Attorney

Self Represented Litigant

Pre-Register

- i. **Person's Email:** enter the person's **email address**
 - A. When using the **Invite A List** button, this field will appear as 'Invite List' along with a **dropdown menu** for the user to choose an existing list, and the fields for role and pre-register will not appear on the screen, [skip to step iv](#)
- ii. **Role:** when a person has not registered, select the **appropriate role** for the user
 - A. Separate roles are available for Attorney and Law Office Staff
 - B. If the person already registered a user account, then the Role will be automatically selected
- iii. **Pre-Register:** **leave unchecked** – this field only appears when a person has not registered

Expiry Date
(DD/MM/YYYY) 

Bundle Access

02: First Hearing

Access Permissions

Add/Remove Party Documents	<input type="checkbox"/>
Download Documents	<input type="checkbox"/>
View Documents	<input type="checkbox"/>
Add Notes	<input type="checkbox"/>
Add Hyperlinks	<input type="checkbox"/>
Invite People	<input type="checkbox"/>

- iv. **Expiry Date:** **leave blank**, or to provide limited-time access, select the calendar icon to choose the date that the user's access to the case will expire
- v. **Bundle Access:** **select the box related to the appropriate Hearing Bundle** to add a check mark
 - A. The user adding a person/list to a case will only be able to provide access to bundles that they have been given access to
- vi. **Access Permissions:** will be **automatically selected based on the user's Role**
Note: *when inviting a list, the standard default permissions will be automatically selected, which is NOT based on user roles*
 - A. Auto-selected permissions can be removed, if needed
 - B. Additional permissions may be selected, but the user adding a person/list to a case will only be able to provide access permissions which they have been granted

Emails

Send bundle update notifications by Email

Send Advisory Invitation Email

Invitation Message

Enter Message

Invite

vii. **Emails:**

- A. **Send bundle update notifications by Email: Do NOT select**
 - B. **Send Advisory Invitation Email: Select** to send an email notification to the invited user
 1. If the text box is not visible, **deselect and reselect the box** to remove/re-add the check mark
 2. If the invited user has opted-out of receiving invitation emails, a **message will appear** indicating that the user opted to not receive advisory emails, which cannot be overridden
- viii. Select the **Invite button** to complete the invitation process
- d. **Repeat this process until all appropriate people/lists have been invited to the case**

2. Providing Access to a New Bundle for a Person Already Invited into the Case

- a. Log in to portal > Locate Case > Select **Update Case** > Select **People tab** > Locate User > Select the **box related to the appropriate Hearing Bundle** to add a check mark

Elisabeth	Attorney	Attorney	---	02	First Hearing	Yes
				03	Training Hearing Type 11/5/2021	Yes
				04	Next Hearing	Yes
Elisabeth	AttorneyStaff	Law Office Staff	---	02	First Hearing	<input checked="" type="checkbox"/>
				03	Training Hearing Type 11/5/2021	<input checked="" type="checkbox"/>
				04	Next Hearing	<input type="checkbox"/>

- i. Only the user that invited the person into the case (*or a court/clerk user*) will be able to provide access to new/additional bundles
- ii. **If a person should no longer have access to the portal** (*e.g., an employee of a law firm quit or was fired*), **contact the court/clerk** to request that the person's account be deactivated