JUSTICE DIGITAL

Court Case Management Digital Service

Lawyers & Legal Assistants User GuideMay 2024



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Classification: Protected A

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Court Case Management Digital Service (Civil)

Court Case Management (CCM) Digital Service enables lawyers and their legal assistants to manage commercial list and civil special hearings digitally so that they can upload and deliver their materials directly to Justices within the Court of King's Bench. This pilot aims to streamline digital court case management tasks and document delivery between four primary user groups: counsel/legal assistants, clerks, court coordinators, and Justices. Within CCM, Counsel and their legal assistants can schedule commercial list hearings, digitize existing civil specials into the system, upload orders for commercial hearings, associate material(s) for an upcoming hearing, and view associated material from oneself and/or other counsel for any upcoming actions that you are a party to—that are within the Court Case Management (CCM) system. The aim is to automate many of the manual back-and-forth email processes between counsel and the courts. Commercial hearings and digitized Civil Specials within this system allows for ease of access, delivery, and visibility to materials provided from counsel/legal assistants to the Courts for your hearing(s).

Court Case Management URL: https://kb-courtcasemanagement-counsel.alberta.ca/

Service currently available for use by:

- Active and practicing Alberta lawyers (Alberta Bar ID is required)
- Both Lawyers and Legal assistant accounts are available
- Legal assistants must register into CCM with approval from their lawyer to access CCM

Service limitations:

 Counsel and legal assistants are only able to digitize Civil Specials that are previously booked with the courts, as this system does not currently schedule net new Civil Specials

Justice Digital is a partnership between the Ministry of Justice and Solicitor General, the Courts, and the Digital Design and Delivery (DDD) to deliver significant modernization of Alberta's justice system.

Thank you for participating in this pilot service. Your engagement is much appreciated!

Lawyer Justice Digital Accounts

Justice Digital allows users to access multiple services through one account and a single login. This means that you can sign-in to all your Justice Digital services using the same email address and password credentials for the different Justice Digital services you need to access. Legal assistants do not have a single sign on capability across Justice Digital services.

If you are a first-time user to Justice Digital, click 'Create an Account' to begin setting up your Justice Digital account. Court Case Management accounts are granted to individuals within law firms. There is **no** consolidated team or admin accounts. Each person that uses the service must create their own account.

For counsel, to create an account to use the service, you will need:

- Your law firm name and location, as listed with Law Society of Alberta
- Your name and Bar ID number as listed with the Law Society of Alberta

Note: Counsels can access multiple Justice Digital services using the same login credentials, if you already have an account with any of the following services:

- Adjournment Digital Service
- King's Bench Court Case Management Commercial List
- King's Bench Filing Digital Service (Civil)
- King's Bench Filing Digital Service (Family & Divorce)
- Surrogate Digital Service
- Transcripts Digital Service

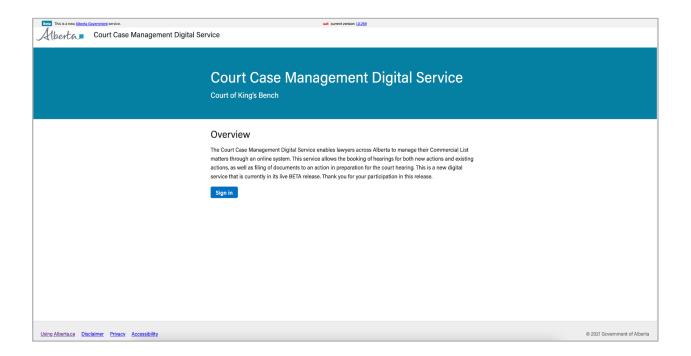
...a new account should not be created to access any of these Digital Services. Instead, sign in with the same email and password you use for your other existing account. You will be prompted to complete an account set up for access to CCM. If you are a legal assistant, you still need to create an account in CCM, even if you have an account in other Justice Digital services.

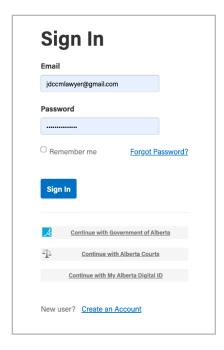
Starting in CCM

The Court Case Management (CCM) landing page describes our digital service and its current stage of development as we continue to improve our service.

Below are a few important notes to help begin your work in CCM:

- 1. We suggest using **Google Chrome** for the best experience.
- 2. Use the following link to access the CCM digital service: https://kb-courtcasemanagement-counsel.alberta.ca/
- 3. Click 'Sign in' on the landing page to launch into the Justice Digital login screen.
- 4. If you are a first-time user to Justice Digital, click 'Create an Account' to begin setting up your Justice Digital account.





Note: If your account details are not working properly, please contact our support email

<u>JSG.Courtcasemanagementsupport@gov.ab.ca</u> to resolve the issue.

Please mark this email address as a trusted sender in your email so that messages are not directed into your 'Spam', 'Promotions' or 'Low priority' folder.



Create Account First name Last name Email Password Confirm password Password Requirements: • minimum 12 characters • minimum 1 upper case Letter • cannot contain part of your username / email address Back Create an Account

Create Account

- 1. Fill out your personal details
- 2. Set a strong password as required by Justice Digital
- 3. Tips are provided for creating an effective and appropriate password for your account
- 4. Finish by clicking 'Create an Account'
- Once successfully completed, you can use the same user login credentials across all of your Justice Digital services

Existing Justice Digital Users

If you have an existing Justice Digital account with another service, or if you have previously used CCM, you can use your existing account credentials (email and password) to log into the Court Case Management (CCM) digital service and simply click 'Sign In'.

Legal Assistant Accounts

The extended functionality of legal assistant accounts in CCM allows for legal assistants to do work within CCM on behalf of their approved lawyer(s).

Requirements:

- Legal assistants MUST create their own CCM account to perform work on behalf of their lawyer(s)
- Legal assistants must request access from lawyers. Once access is granted, they can also remove their access from approved counsel
- Legal assistants cannot join or leave actions on behalf of lawyers. Actions need to be joined/left by counsel
- Counsel **must** approve a legal assistant's access request to allow them to use CCM on their behalf. Counsel can also **revoke** a legal assistant's access at any time

Legal assistants can do the following in CCM on behalf of their lawyers:

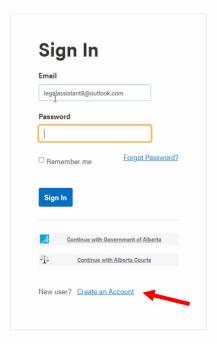
- Submit requests to schedule commercial hearings
- Submit requests to digitize an existing civil special
- Associate materials on behalf of their approved lawyer(s) to a hearing
- Download materials associated to a hearing that their lawyer is a party to
- Legal assistants can submit orders for signing and filing for a commercial hearing

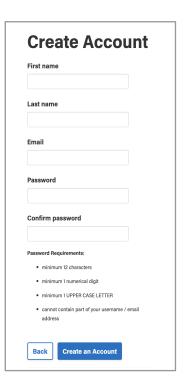
Creating a Legal Assistant Account

As a legal assistant, if you are a first-time user of Court Case Management (CCM), click 'Create an Account' to begin setting up your account. Court Case Management accounts are granted to individuals within law firms. There is **no** consolidated team or admin accounts. Each person that uses the service must create their own account.

Instructions:

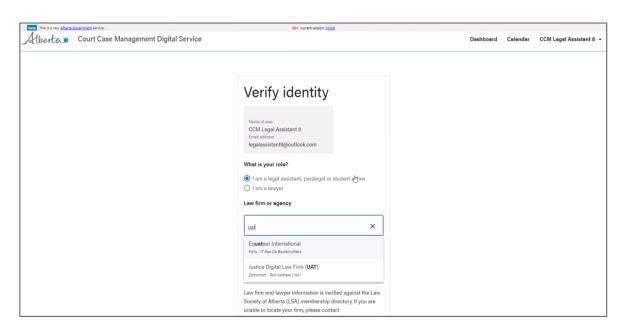
- 1. Click 'Create an Account' on the Sign in page, then proceed to fill out your details
- 2. Set a strong password as required by Justice Digital
- 3. Tips are provided for creating an effective and appropriate password for your account
- 4. Finish by clicking 'Create an Account'



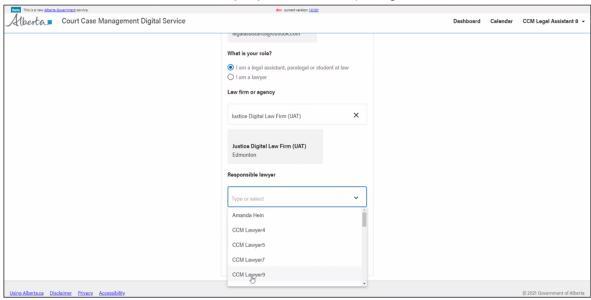


Upon completing the "Create Account" page, you will receive an email to validate your email address to finish your account a creation. For legal assistants, when validating your email address, you will be prompted to verify your identity by requesting access from a lawyer to finalize your approval to use CCM.

First, you will need to type in the law firm or agency that the lawyer you work for belongs to. Please note, you will be able to request additional lawyers after this initial account setup.

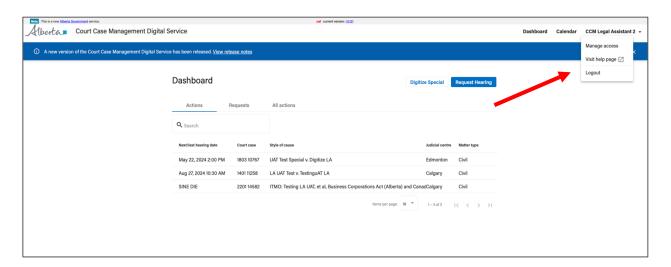


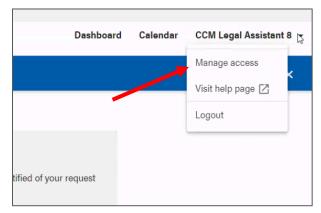
Second, enter in the name of the lawyer you will be completing work in CCM on behalf of.



Note: The lawyer must have their own CCM account, or they will not appear in the list.

Once successfully completed, and the lawyer and law firm match, complete the flow to move into your dashboard. Here you will see a message telling you that your request to access CCM is pending the lawyer's approval. Only when your lawyer approves the hear If you need to perform work for multiple lawyers in CCM, you can request access from another lawyer.





If you need to perform work on behalf of multiple lawyers in CCM, you can request access from another lawyer. You can do this once a lawyer approves your access.

You can do so by visiting the **manage access** page by clicking your user menu on the upper right-hand corner of the navigation bar.

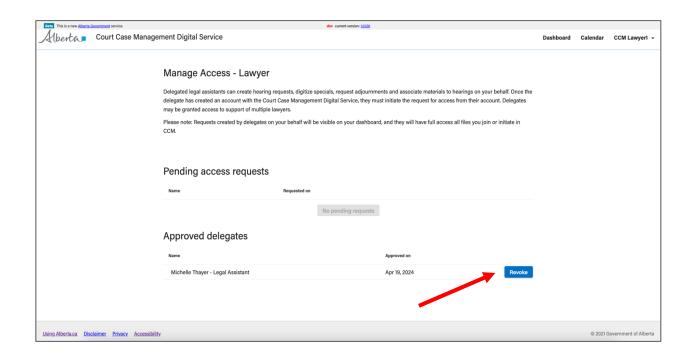
Once the legal assistant's lawyer(s) approve their requests to access CCM, those legal assistants will be able to perform work on behalf of their approved lawyer(s). Legal assistants will have visibility into the matters that their lawyer(s) are a part of, as well as those hearings and materials within CCM that their lawyers can view.

Managing Access to CCM

Both lawyers and their legal assistants can manage their access to CCM. However, only legal assistants can "**request access**" to use CCM on behalf of lawyers.

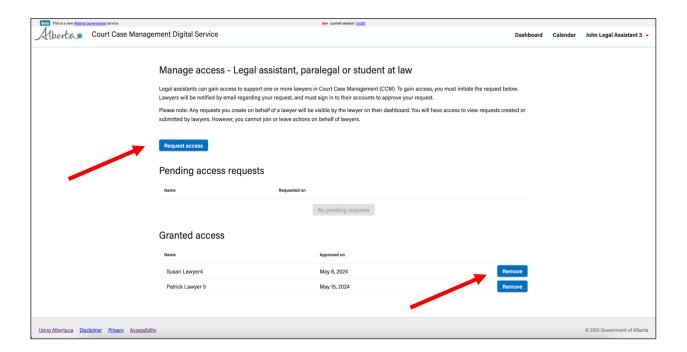
For Lawyers managing legal assistants:

- Lawyers can view pending legal assistant access requests as well as their approved delegates within CCM
 - o Note: this is not for all the other Justice Digital services, only CCM.
- Lawyers can revoke their approved delegates access to CCM at any time
- Revoking access from a delegate removes them from viewing what the lawyer sees and completing work on behalf of the lawyer. If the delegate requires access again to CCM, they will need to request access again from their manage access page.



For Legal Assistants managing access to CCM:

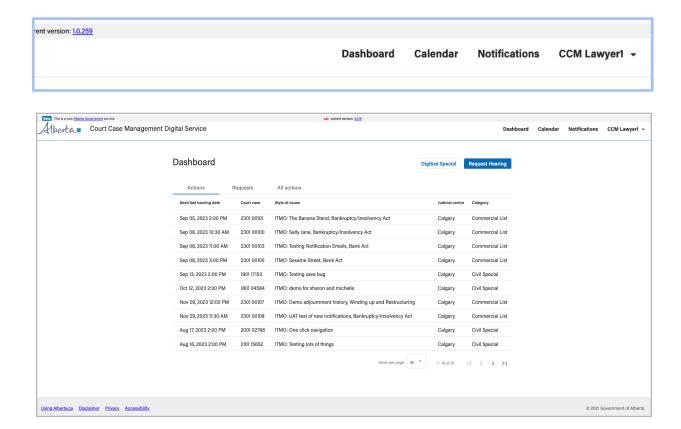
- Legal assistants can request access to one(1) or more lawyers in CCM
 - o Note: this is not for all the other Justice Digital services, only CCM.
- Legal assistants can remove their own access from a lawyer they have been granted access to
- Removing access from a lawyer removes them from viewing what that lawyer sees and they can no longer complete work on behalf of that lawyer. If the legal assistant requires access again to CCM for that lawyer, they will need to request access again and gain approval from that lawyer



Your Dashboard

Navigate through Court Case Management (CCM) using the top navigation to view the following:

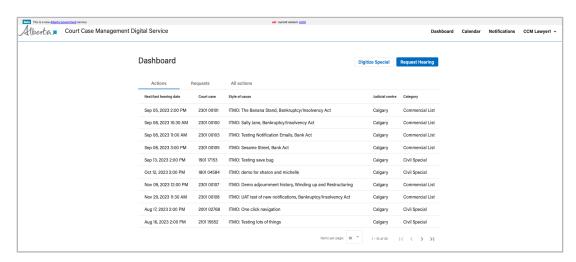
- 1. **Your Dashboard** View and manage your court cases and active actions, as well as your hearing requests.
- 2. Judicial Calendar View the Commercial list calendar.
- 3. **Notifications** Stay up to date with activity on your actions and hearing requests.
- 4. Your Account (Your Name) View your account details.



Note: The primary navigation menu can be found at the top of the screen.

There are **three(3) tabs** on the dashboard to manage your court cases:

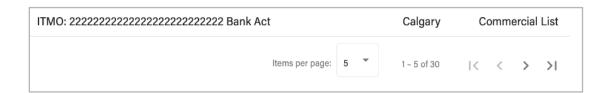
- 1. **Actions** Actions you have joined as counsel within the CCM system.
- 2. **Requests (hearing requests)** These are your pending hearing requests that have been submitted for approval to the Court Coordinator.
- 3. **All Actions** All actions initiated in the CCM system are available to other CCM users within the CCM system.





Note: Your dashboard tabs are displayed as shown in the image above. The blue line underneath the tab (i.e. as seen below the word "Actions"), indicates which tab you are currently viewing.

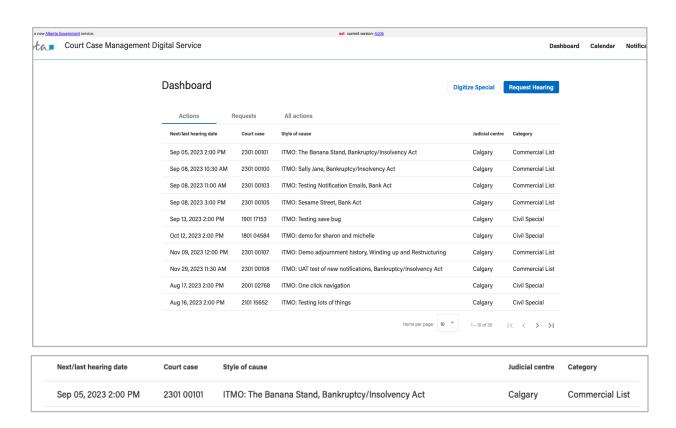
Navigate and adjust the view of your dashboard to manage your work.



Your actions tab

Actions you have joined as counsel within the CCM system.

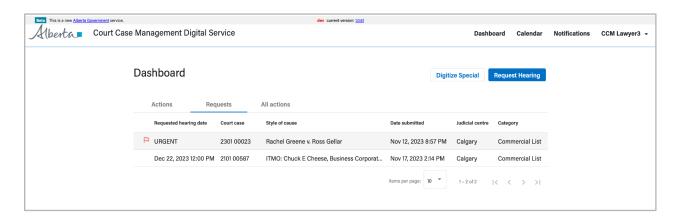
- 1. **Next/last hearing date** Your hearings will either be listed displaying the upcoming hearing date, or most recently passed date.
- 2. **Court case** actions are listed with either an action number or a reference number. (i.e. COM1234567)
- 3. **Style of cause** the style of cause listed are formatted as either applicant vs. respondent or as an "In the matter of" (ITMO).
- 4. **Judicial centre** the judicial centre is the jurisdiction where the action was created.

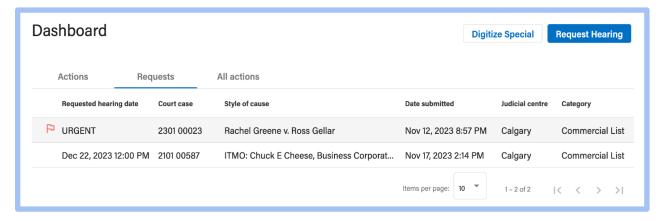


Your hearing requests tab

Your pending hearing requests that have been submitted for approval to the Court Coordinator.

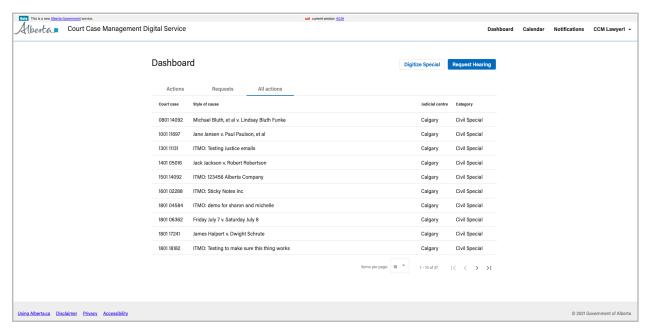
- 1. **Requested hearing date** the date you requested the hearing for.
 - a. Urgent requests will display a **red flag** and will be marked as **URGENT**.
- 2. **Date submitted** the day in which the hearing request submission was submitted to the system for the Court Coordinator to review.





Your all actions tab

Actions listed in the all actions tab are public for all users with access to the CCM system to view. **If you are not part of an action, you have limited access to it**. Listed are actions within the CCM digital service that have received an official action number.





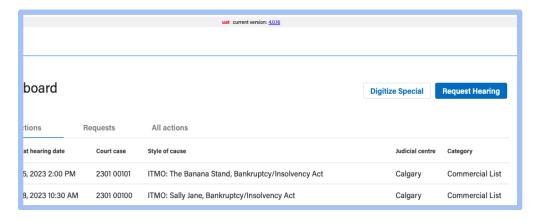
Note: The court case number may also be referred to as action number within the courts.

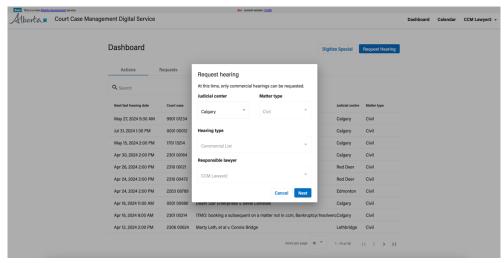
Commercial Hearing Requests

Booking an originating hearing request

To request a hearing, simply click the "**Request Hearing**" button to begin. To begin you will be prompted to define the following:

- The judicial centre from which the matter is originated from
- A legal assistant must select the responsible lawyer that they are submitting a hearing on behalf of, while lawyers are defaulted as the responsible lawyer submitting the request



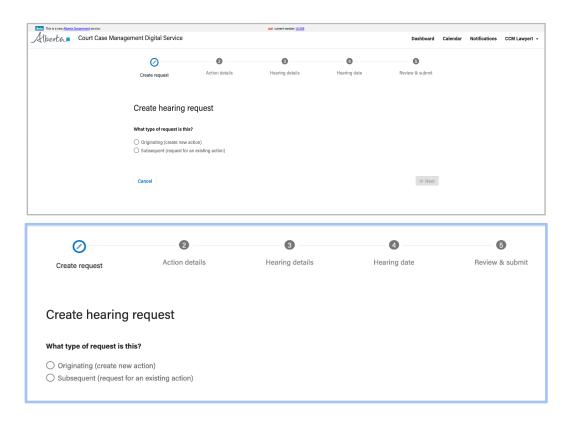


Note: Matter type and hearing type are non-selectable fields as CCM only intakes Commercial List hearings under the civil. Similarly, submitting requests to digitize an existing civil specials behaves in the same way.

1. Create hearing request

Select the type of hearing request that you are submitting:

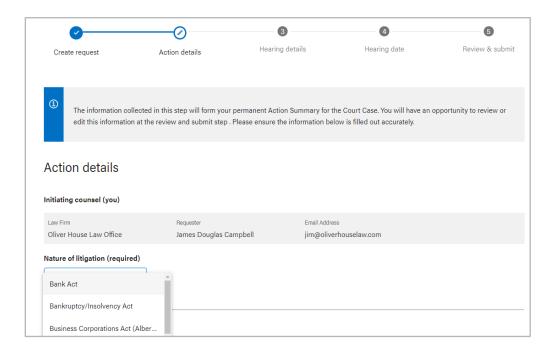
- 1. **Originating request** Request a new hearing with no action number existing. This will generate a 'new' court case.
- 2. **Subsequent request** Request a hearing for an existing action with an action number This will add another hearing to an existing court case.

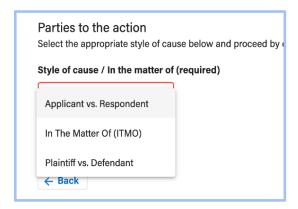


2. Action details

Visibility of your **initiating counsel** details is automated so that the Court Coordinator will know who and where this request is coming from.

The **nature of litigation** will further aid the Court Coordinator in clarifying the nature of your hearing request that is to be reviewed. For the nature of litigation, you should enter the most relevant nature of litigation if there are multiple.





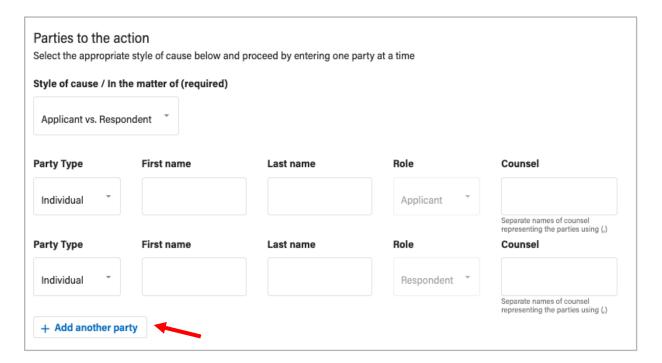
Defining the style of cause

First, define the **style of cause** as either:

- Applicant vs. Respondent
- In The Matter Of (ITMO)
- Or Plaintiff vs. Defendant

Defining the style of cause (parties to the action)

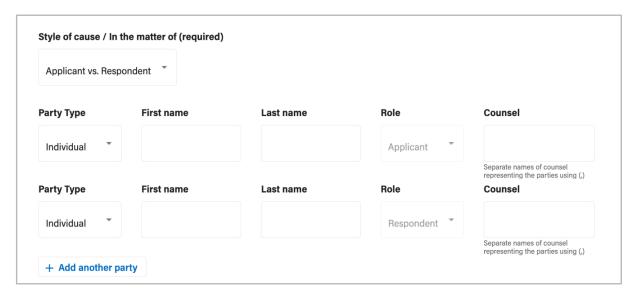
- If you list individuals, you can enter the first and last of the person being listed, their role within the application, and the name of any counsel representing them (if known)
- If you list organizations, you can enter name of the organization being listed, their role within the application, and the name of any counsel representing them (if known)
- You can keep adding more parties by clicking "Add another party." You can remove parties entered in error by clicking on the "Remove" button.
- A counsel name must be provided for at least one(1) applicant.



Note: As the requester, you must fill out all the required fields to proceed to the next step.

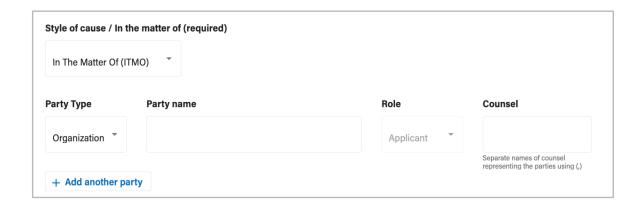
Defining style of cause - Applicant v. Respondent

If you select an Applicant v. Respondent style of cause, you will be required to enter at least **one(1) applicant and one(1) respondent.** You can add and remove party lines as needed. Parties do not need to be entered in order of applicants and respondents.



Defining style of cause - In The Matter Of (ITMO)

If you select an **In The Matter Of (ITMO)** style of cause, you will be required to enter at least **one(1) applicant.** You can add and remove party lines as needed. Parties do not need to be entered in order of applicants and respondents.

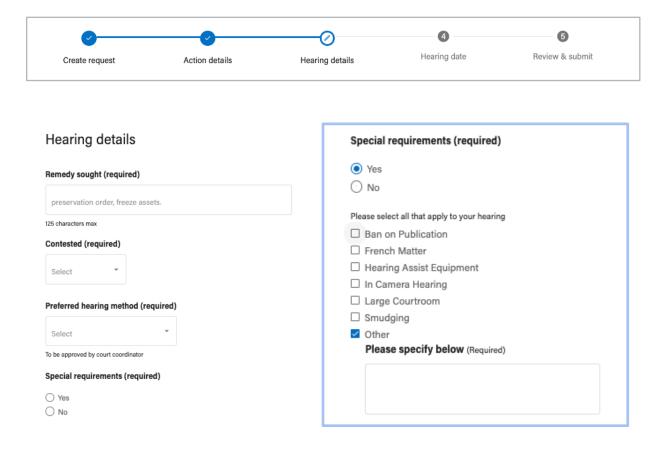


3. Hearing details

Stating the **remedy sought for your hearing request is required** and will help the Court Coordinator schedule your hearing request appropriately.

If known, please state whether the hearing is contested, not contested or unknown.

Also, state the preferred hearing method for the Court Coordinator to review so that they can schedule your hearing accordingly.

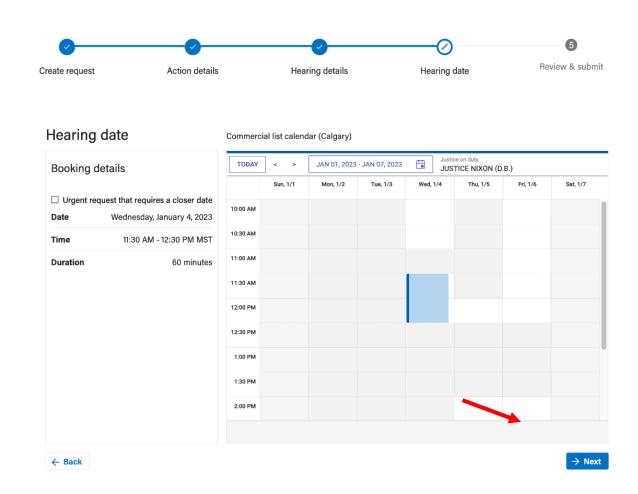


List any **special hearing requirements** necessary for your requested hearing. If what your hearing requires is not listed, please select other to specify what those requirements are.

4. Select hearing date

Request your desired hearing date and time of hearing from what is available:

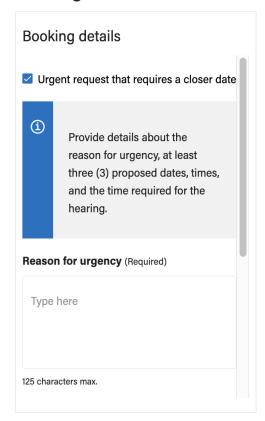
- Commercial Calendar Visibility to Commercial court schedule and assigned Justices for each commercial week.
- 2. **Request Date & Time** Select an available time block and drag the box to expand the time slot.

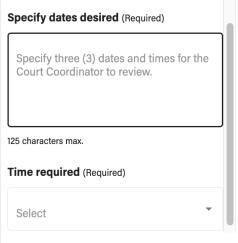


Selecting a date using the interactive calendar (right side) will automatically populate the requested hearing time, date and duration from your selection.

Click 'Next' to proceed with your hearing request.

Hearing date





Urgent hearing requests

Urgent hearing dates are for when your matter is urgent, and you need to see a justice before there is calendar availability.

When you submit an urgent hearing request, the court coordinator will choose a date for your hearing.

Fill out three(3) text boxes to help the coordinator to identify an appropriate time for your hearing.

Once the coordinator has made a decision, **you** will receive an in-app notification with the date and time of your hearing.

Reason for Urgency

Provide a brief description of the nature of the urgency of the request.

Specify dates desired

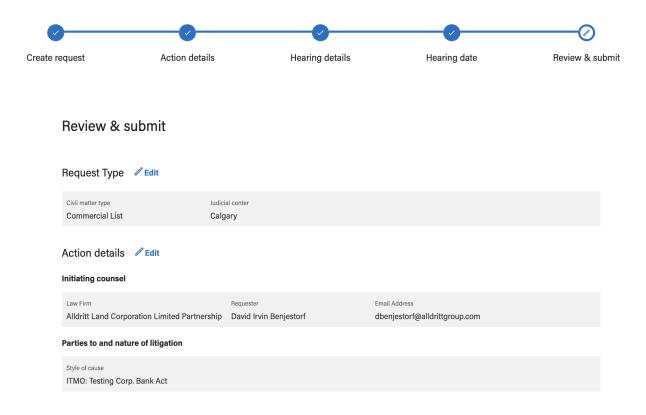
Please list three proposed dates and times for your hearing for the coordinator to review.

Select time required

Please indicate the time required for your hearing.

5. Review and submit

Before submitting your request, you will have the opportunity to review the details that you've included in your submission request so that you can complete your submission with confidence.



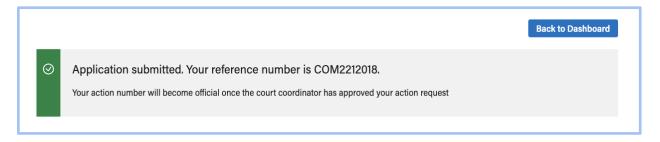
If you see something that appears incorrect, you can go back and edit that section before submitting your request.

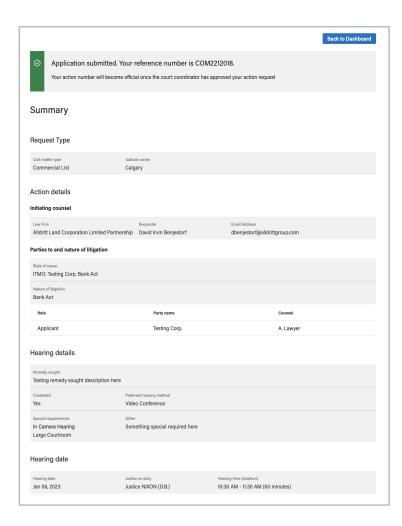
Click the 'Edit' button beside each section title to quickly navigate back to that section.



6. Confirmation summary

Upon submitting your hearing request, you will receive a Court Case Management (CCM) Digital Service **reference number for originating requests** so that you can easily refer back to your hearing requests while your court cases are being prepared.





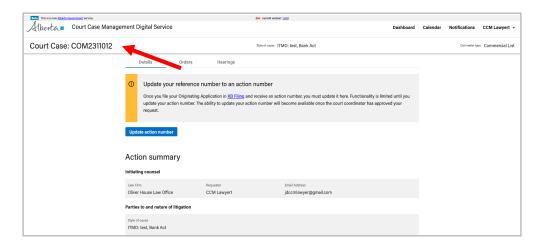
Your hearing request summary is kept in the system while it is pending, **for your reference**, so that you can contact support or the Commercial Court Coordinator in regard to your request at any time.

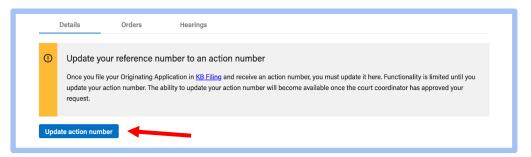
Update your reference number to an action number

Once your hearing request has been approved by the Court Coordinator in CCM, you will notice that the hearing will appear on your dashboard underneath the **Actions tab**. You will also see that the **court case number** listed displays the **reference number** (i.e. COM123456) that was initially provided to you upon submitting the hearing request in CCM.

To **update this reference number in CCM to appropriately reflect the action number** of your court case, please follow these steps:

- Begin your filing in KB Filing Digital Service for your matter: https://gb-filing.alberta.ca/
- Start filing your documents in KB filing and reference your action details from Court Case Management (CCM) Digital Service
- Once you've successfully filed to KB Filing, you will receive an action number
- Come back into CCM, locate the action on your dashboard and click to view it
- On the action **details** screen you will see a prompt to update your action number
- Click the 'Update action number' button

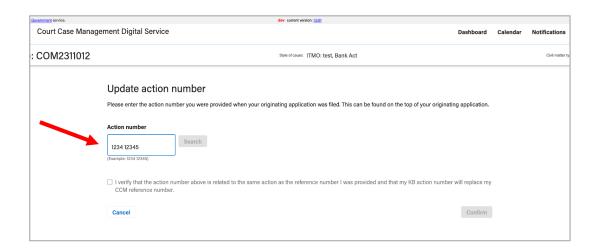




If you have successfully filed in the **KB filing Digital Service** for your action, you would have received an action number for your filed materials.

The action number provided by KB Filing is what you will be entering in the **update action number** screen (as shown below).

In the **action number** field, enter the action number from your filing and click **search**.

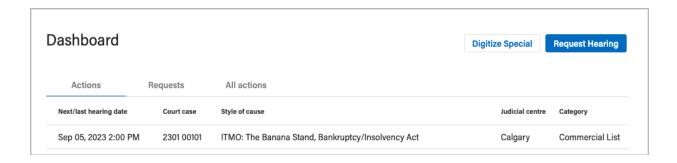


If the **action number** you entered matches the original jurisdiction of the hearing in CCM and the action details match **check off** the verification acknowledgement and click the **confirm** button. This will then return you to the action details screen, and you will see that the court case number now reflects your action number

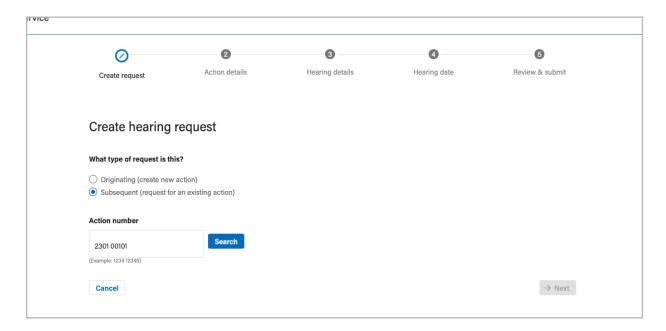


Booking a subsequent hearing

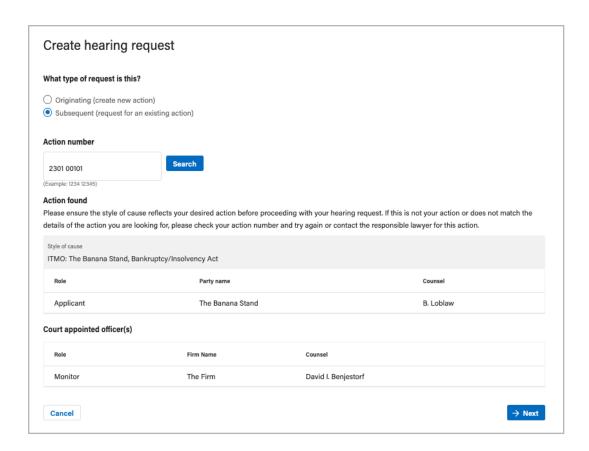
To request a subsequent hearing for an existing action, simply click **request hearing** on your Court Case Management dashboard to begin.



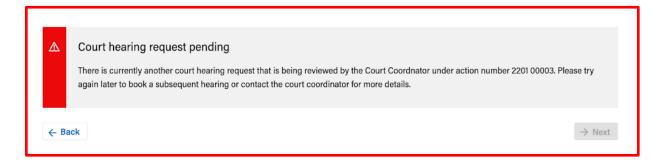
- On the following screen, select the **subsequent** option, below originating, when creating your hearing request.
- Enter the appropriate action number of the desired action in which you wish to schedule a subsequent hearing for. (Example: Action number 2301 00101 as shown below)



Once you have entered the action number, click **Search**. The system will then display the style of cause as well as a list of parties to the action for you to confirm that this action is the one you are seeking to book a subsequent hearing for. If the details are correct, proceed by clicking **Next**.



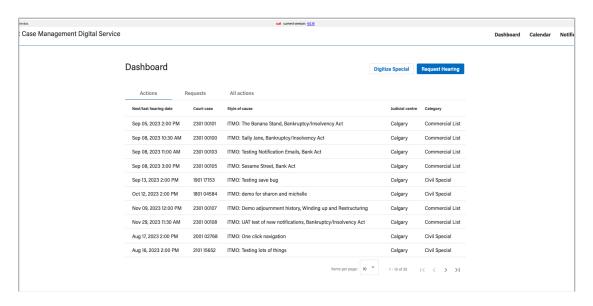
To request a subsequent hearing for an existing action, an action number must exist for that action and a prior hearing must be already initiated within the CCM system.



Note: An error message will appear if there is a conflicting subsequent hearing request in process.

Submitting Orders

To **submit orders to the official court record**, you will need to go to your **Actions tab** first and find the case in which you wish to submit orders to.

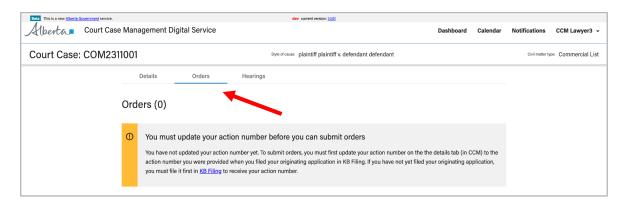


Note: Your action must have an action number in order for you to submit orders to the action.

The orders tab

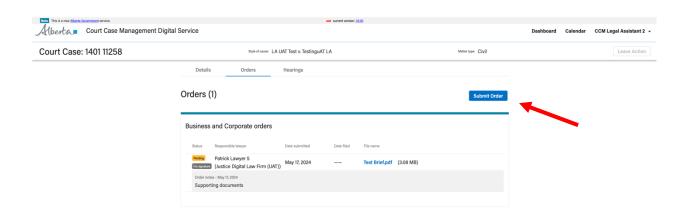
Upon entering your court case, you will first land on the action details summary and will need to navigate to your **orders tab**. Your action **must have an action number** (provided by KB Filing upon filing documents):

- 1. View orders filed to the official court record and
- 2. File new orders to the official court record



If your action has an action number but orders have yet to be filed to your action, then there would be no orders listed and a **submit orders** button will be visible. **If the action only has a reference number, this button will be unavailable to counsel.**

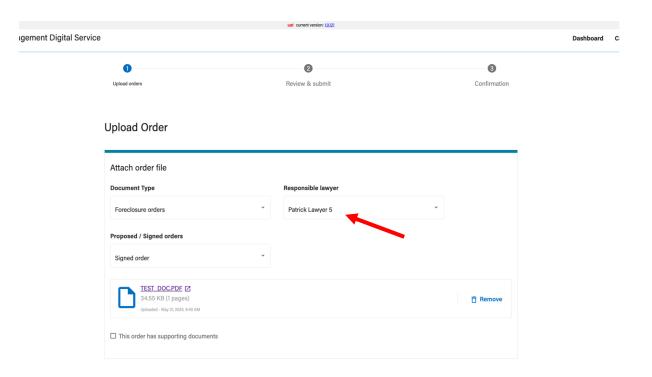
Click **Submit Order** to submit your own orders to the action.



Defining the order to be filed

When you click submit order, you will be first taken to a file uploader where you will:

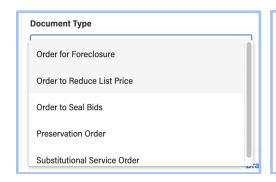
- 1. Define the **order type** you wish to submit
- 2. **Upload** your pdf file (current version of the App only supports PDF documents)

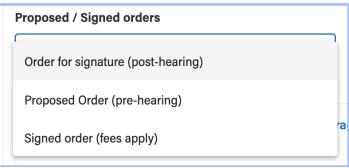


Note: If you are a legal assistant, you will need to select the responsible lawyer you wish to submit this order on behalf of. For lawyers, this will default to your name if you are submitting the order.

You must **define the order type you wish to upload first**, before uploading your pdf file from your device. There is also a second selection to define whether this order being submitted is an:

- Order for signature (submitted post-hearing),
- a proposed order (submitted pre-hearing),
- or is a signed order.

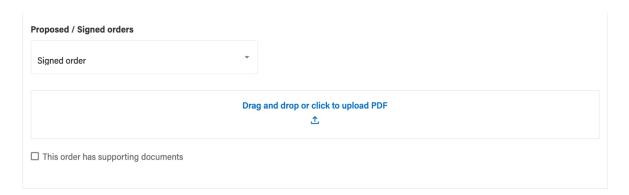




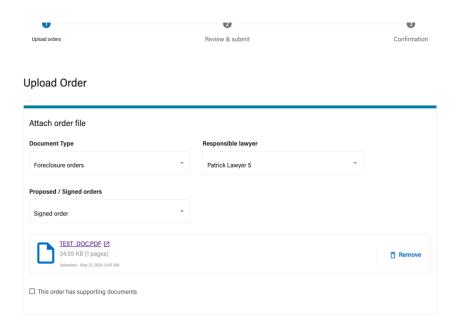
Uploading orders

You can upload your orders (PDF files) by:

- 1. **Clicking the uploader** Click the uploader to open a dialogue box that allows you to select a file to upload from your computer
- 2. Drag & drop Drag files directly from your computer into the uploader to upload a file

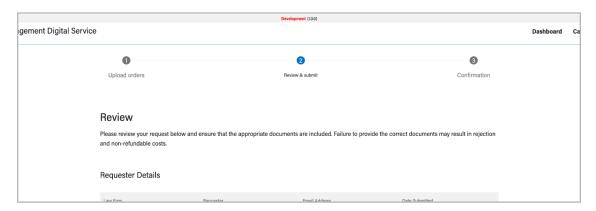


In this current version, you are only able to submit **one order (PDF) at a time** during this process. Once you upload a file, you may also remove it if you accidentally uploaded an incorrect file. You may also describe to the Justice as to whether the order has any supporting documents to reference as necessary.



Review and submit

Once you have uploaded your order file and have noted any supporting documents that have been filed that may accompany the order within your order notes, you will move forward onto your **review page** before you submit your order to the Courts to process.



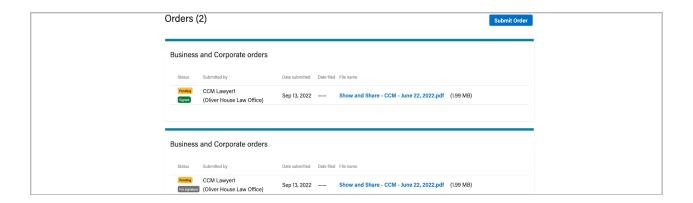
Note: Orders are free of charge and require no payment. Please ensure that all your order documents and order notes are all in order so that they may be processed in an efficient and timely manner

Viewing Orders for an Action

Once your orders have been **successfully submitted** for review and filing, they will appear in a list under your documents tab within your action.

Each order successfully granted and filed to the Courts will display a **status tag** as they are pending review by the Justice or a Clerk.

You can continue to submit orders to the courts regarding your action as necessary for your upcoming hearings.



- Green status means that the order is filed.
- Yellow status means that the order is pending.
- Red status (not pictured) means that the order has been rejected and will be accompanied with notes.
- Grey status is informational and requires no action by you within the CCM system.

Status tags for orders

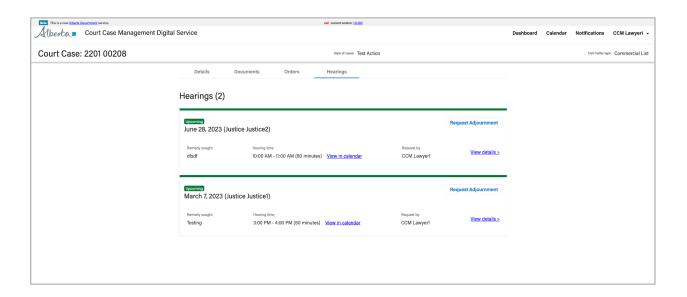
You may see a combination of tags depending on its current status:

- 1. Pending Orders submitted that are pending Justice to review.
- 2. Filed Orders granted and successfully filed to the Courts.
- 3. **Granted** Orders granted by the Justice but have yet to be filed.
- 4. Signed Orders that are signed but are still processing to be filed by a clerk.
- 5. Revised & Granted Orders revised by the Justice and sent directly to the clerk to file.
- 6. Clerk to file Files granted by the Justice but pending Clerk to file.
- Clerk to sign Orders that have been granted and approved by the Justice which are directed to the Clerk to sign on behalf of the Justice.
- 8. For signature Orders requiring to be signed and pending a signature.
- 9. Revised Filed orders that are noted as revised.
- 10. Rejected Orders that have been rejected by the Justice or the Clerk.

Pre-Court Adjournments

Moving a scheduled hearing date

Scheduled hearing dates can be **adjourned pre-hearing by counsel** if the scheduled hearing date needs to be changed to a new date or adjourned sine die (put on hold with no set date).

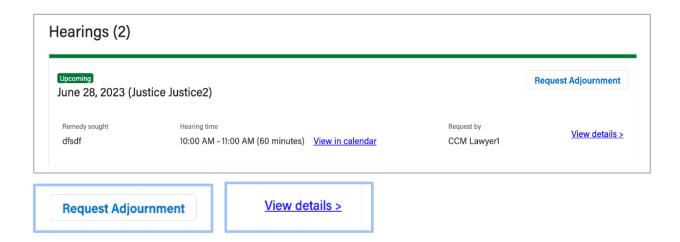


Request an adjournment

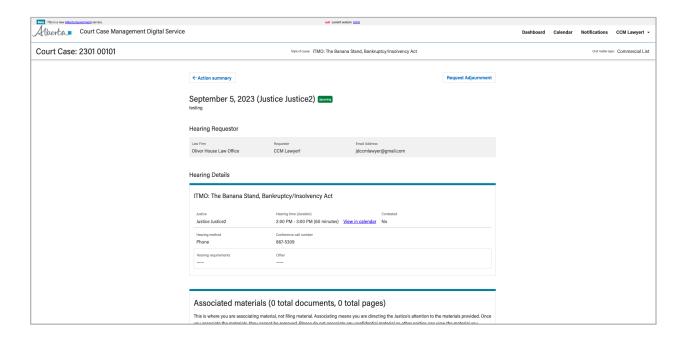
To request an adjournment for a hearing, the hearing must be:

- 1. An **upcoming hearing** in the Commercial Calendar that has already been scheduled by the Court Coordinator.
- 2. Is **not a pending** hearing or pending adjournment request.
- 3. is **not a rejected** hearing request.

Go to the hearings tab within an action and click **request adjournment** to begin your request to adjourn to a new hearing date or to adjourn a hearing sine die.



You may also click **view details** to view the hearing details before choosing to adjourn.

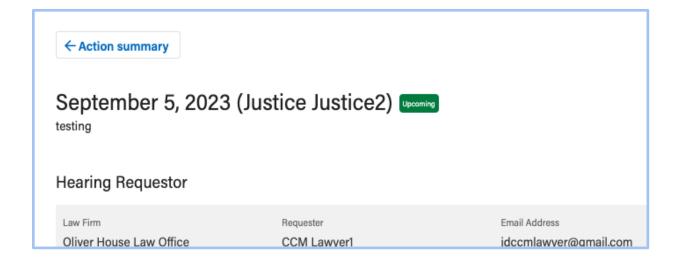


Adjourning from the hearing details view

You can also **request adjournments** from within the hearing details view as well to review the hearing details before you choose to adjourn.

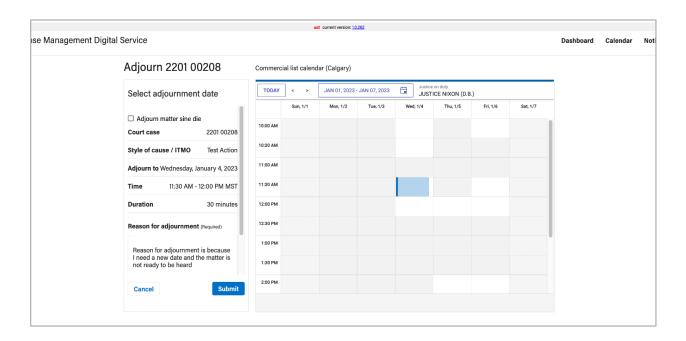


Click the **action summary** button to return to the hearings tab to navigate back to other hearings within this action.

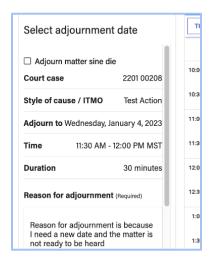


Adjourn to a set date

Select a **new date and time** using the interactive Commercial list calendar (see right side image) in which you would like to adjourn your upcoming hearing to.



Note: Your adjournment request must adhere to the rules and request deadlines of the Commercial calendar. To see the current guidelines to the Commercial practice, please visit: https://www.albertacourts.ca/gb/areas-of-law/commercial



Adjournment details

On the display to the left of the calendar, **enter your reason for adjournment** to communicate the reason for submitting the desired adjournment request to the court coordinator.

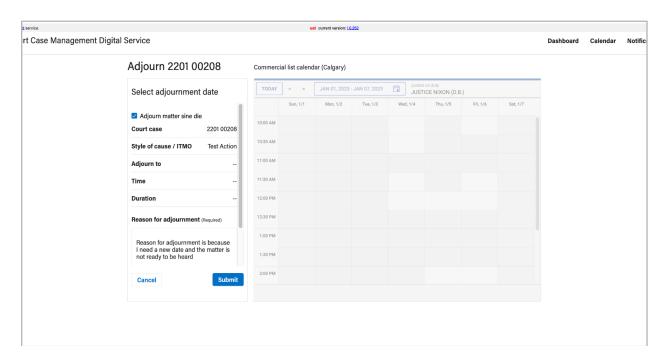
You may also request a hearing to be **adjourned sine die** if the adjournment you are requesting has **no set date defined**

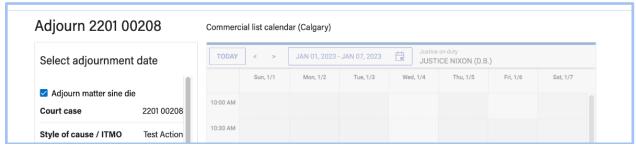
Adjourn hearing sine die

When you **adjourn a matter sine die**, you are not required to select a date on the interactive calendar (to the right of the screen), as the **adjournment request is for those adjournments** with an undefined date.

The **calendar itself will no longer be interactive** (as shown below) when adjourn matter sine die is selected on the left-hand display.

A **reason for your adjournment is required** in order to complete the adjournment request.





Adjournment statuses

Once your adjournment request has been **successfully submitted** for review, it will update the hearing under your **hearings tab** within the action. Each adjournment approved by the court coordinator will update the status tag as they are pending review by the Justice or a Clerk

Adjournment statuses that the system will display may include:

- Green status means that the hearing date is approved and scheduled (i.e. upcoming).
- Yellow status means that the adjournment is pending.
- Red status (not pictured) means that the adjournment requested has been rejected and will be accompanied with rejection notes from the coordinator.
- Grey status is informational and requires no action by you within the CCM system

Digitize Existing Civil Specials

Matter eligibility

This service allows you to **input previously booked half-day, civil specials and SafeRoads applications** onto Court Case Management so you can submit your filed materials to the Justice assigned to your matter (your matter exists in the court's record, but you are digitizing it to have visibility and to associate your hearing materials).

Other eligibility criteria:

- Your matter **must** have a previously civil special or SafeRoads half-day special booked.
- The matter **must have** a civil action number
- Applications **must** originate from Calgary, Edmonton, Lethbridge and Red Deer.
- The matter **must not** be confidential
- There **must not** be a self-represented litigant involved in the special
- There **must not** be an ineligible lawyer. Lawyers not in Alberta (or without a valid Alberta Bar ID) and Government Lawyers are ineligible.
- SafeRoads full day and stay applications cannot be accepted into CCM.

If you have received this communication and your matter is ineligible for one of the reasons listed above, please advise the civil court coordinator via email at:

- Civilcoordinator.QBCalgary@albertacourts.ca
- CivilCoordinator.QBEdmonton@albertacourts.ca
- <u>LethbridgeCourtCoordinator.KBJ@albertacourts.ca</u>
- RedDeerCourtCoordinator.KBJ@albertacourts.ca

Signing in

If you have an existing Justice Digital account for any other service, you can use your existing account to log into the Court Case Management (CCM) digital service.

If you do not have an account, please click <u>here</u> for instructions on how to set up a Justice Digital account.

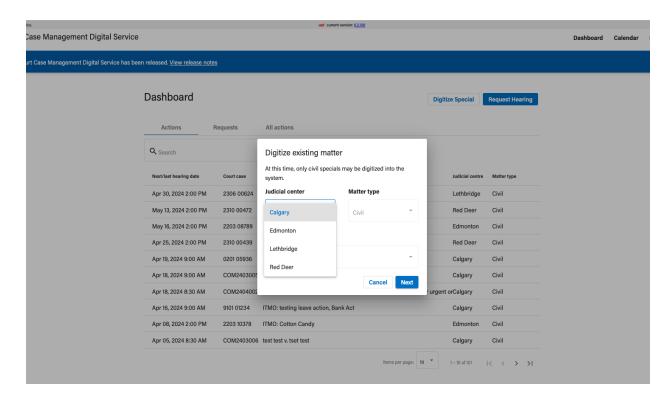
Getting ready to digitize your matter

The first thing you need to do is to digitize your matter.

Digitizing your matter means that you need to enter the details from the document that originated your matter so a digital record of the matter can be made in CCM.

To digitize your matter, click here and sign into the CCM digital service.

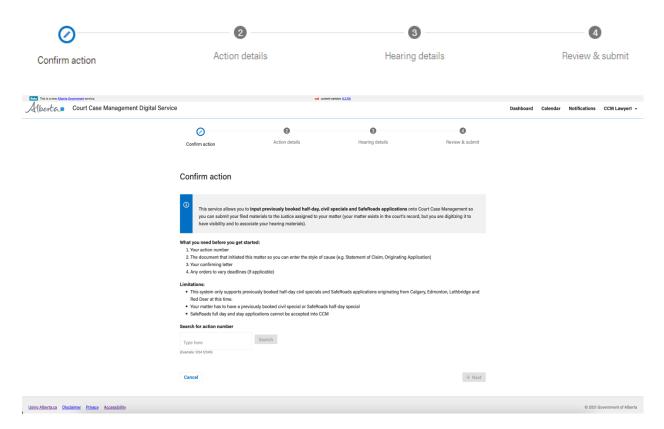
When you access the service, you will see the following informational pop-up (see next page). Please ensure that you have gathered the required materials before beginning your submission, as **you cannot save any work-in-progress.**



Note: If you are a legal assistant, you will need to select the responsible lawyer you wish to submit this request on behalf of. For lawyers, this will default to your name if you are submitting the hearing request.

Step 1 - Confirm your action

- Once you have signed into CCM, type the action number for your matter into the search box and click **Search**.
- If you have entered a valid action number, you will see the details of the action found:



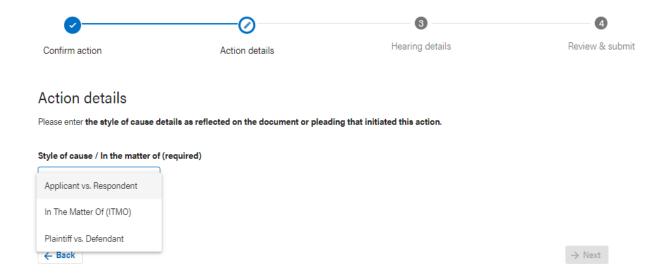
Once you have entered a valid action number (which must match your jurisdiction), confirm
that the action is the correct action you wish to digitize, and click "Next".



Step 2 - Action details

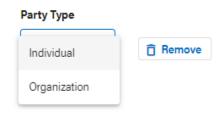
Important note: You are entering the style of cause details that **commenced** the matter, not the parties participating in the half day civil special. Even if not all parties are participating in the half day civil special, the full style of cause must be entered into CCM.

- Referring to the document that commenced this matter, please select the most appropriate style of cause type (i.e. for a Statement of Claim, Plaintiff v. Defendant is most appropriate).
 If there has been an amended commencing document, please use the latest filed commencing document.
- Depending on the style of cause type you choose, you will have to enter both a Plaintiff(s) and Defendant(s) or an Applicant(s) and Respondent(s) or an ITMO party(ies)
- If you need to add more parties, click "Add another party".



Party types

If the party you are entering is an organization or company, you can change it by clicking on the 'Party type' dropdown menu:



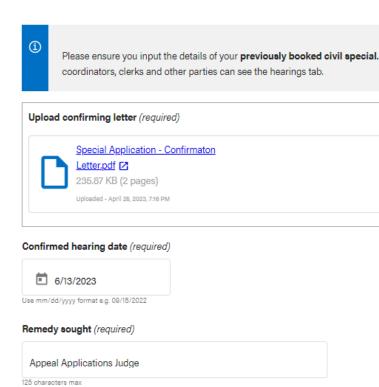
Once you have **entered all of the parties** as reflected in the commencing document, click **Next.**

Step 3 - Hearing details

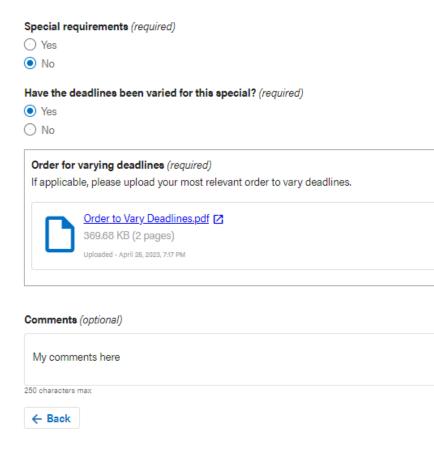


Hearing details

- 1. **Upload** the **confirming letter** as provided to you by the court coordinator when your matter was originally booked.
- 2. Use the calendar picker to select your **confirmed hearing date** as noted on your confirming letter.
- 3. Enter the most relevant remedy sought.



- 4. Indicate any **special requirements** for the hearing, such as a large courtroom. If there are no special requirements, select "**No**".
- 5. Indicate if the deadlines have been varied for this special. If they have, please upload a copy of the order to vary deadlines. If you have more than one order, please upload the most relevant one. If there is no order to vary deadlines, select "No".
- 6. Enter any comments you may have for the Court Coordinator to read and review. Please note that comments are visible to all parties involved in the action.



Once you have entered all the required information to digitize your hearing, click "Next".

Important note: The details entered here are visible to other parties, including justices, other lawyers, coordinators and clerks.

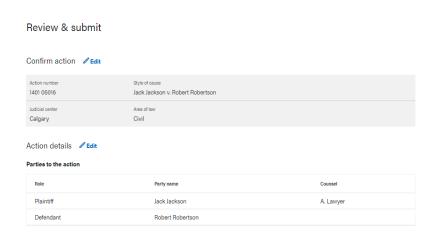
Step 4 - Review & Submit

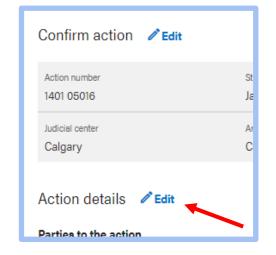


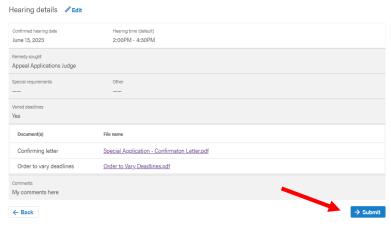
Final edits before submission

Check to ensure that all details were correctly entered.

- If you need to edit a section, click the "Edit" button beside each section header and you will be brought back to that section.
- Once you are satisfied that you have entered all of the details correctly, click "Submit" to complete your hearing request submission

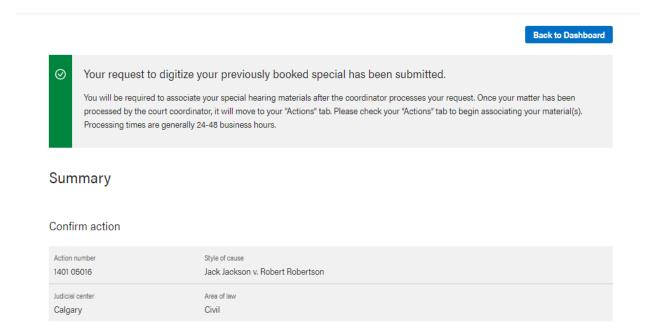






Successful submission

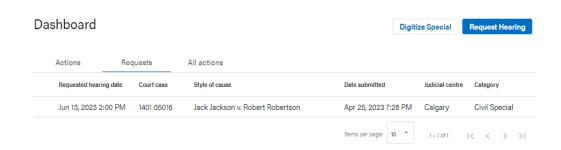
Once your digitization request has been successfully submitted, you will see the following confirmation message:



Note: You can choose to take a screenshot of this page during this time for your reference.

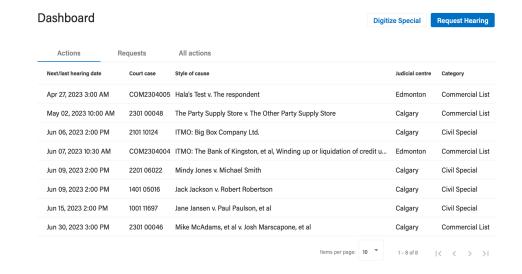
The Requests Tab

You should now see your request to digitize your previously booked civil special under your **Requests tab** on your **dashboard**. The matter will remain on your Requests tab until the court coordinator has processed it.



The Actions Tab

Once your matter is confirmed and digitized by the court coordinator, it will move from your **Requests tab** to your Actions tab on your **dashboard**. Processing times for the court coordinator are **generally 24-48 business hours**.



Congratulations!

Your Civil Special has now been successfully digitized into the CCM digital service!

Email Notifications

Types of notifications

Court Case Management provides email notifications. Different types of notifications you will see provided by CCM include:

- 1. **Hearing request updates** Confirmation that the Court Coordinator has accepted and booked your hearing requests into the Commercial Calendar. This includes originating requests, subsequent hearings, and adjournments.
- 2. **Document filing updates** You will get notified when documents and orders have been successfully approved and filed in the system.
- 3. **Hearing and document rejection** You will be notified of hearings, documents, and orders that have been rejected by the courts.
- 4. **Activity on your actions** You will have visibility of others joining your action (i.e. opposing counsel joining your action).
- 5. **Email notifications** You will receive email notifications for certain activities within CCM (i.e. submitting a hearing request, your hearing request has been approved, etc.)

Important note: Please make sure to check your spam, junk mail, and promotions folders for CCM email notifications as your inbox may flag these emails initially as such.

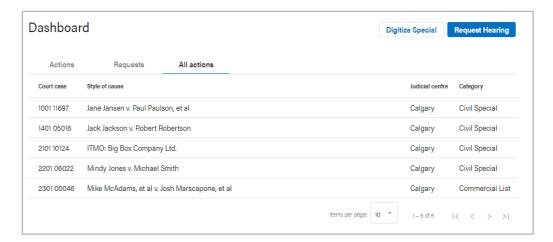
Joining an Action (Counsel)

Requirements

- 1. You **must** be a lawyer. Legal assistants cannot join an action on a lawyers behalf.
- 2. You **must** join an action as a lawyer for you and your legal assistant(s) to be able to associate materials to a hearing.
- 3. And you **must** represent a party or be a court appointed officer in that action to join it.

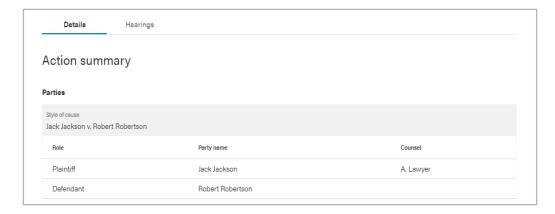
Step 1 - Locate the matter you need to join

Locate the matter in your "All Actions" tab.



Step 2 - Confirm this is the action you need to join

Review the **action summary** and ensure that this is the correct action you need to join.



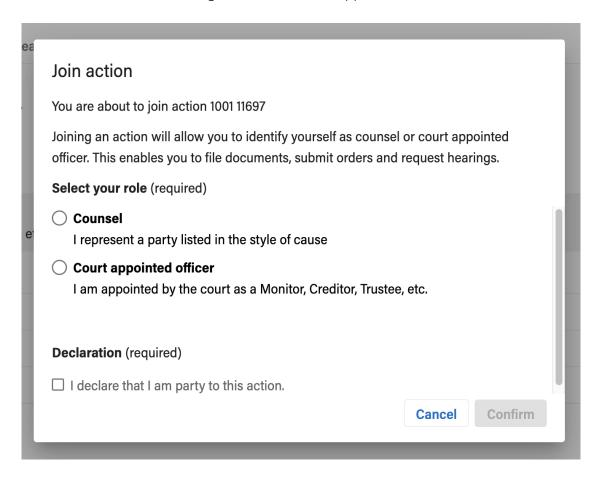
Step 3 - Click Join action button

In the top right of the Action summary, click the "Join action" button.



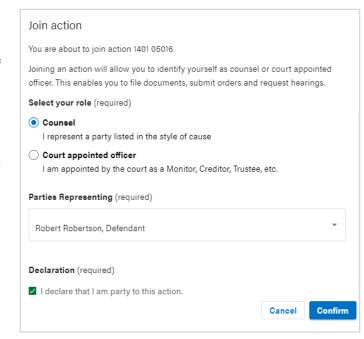
Step 4 - Joining an action

Upon clicking join action, you will be presented with a prompt that allows you to identify your role within the matter—those roles being counsel or a court appointed officer.



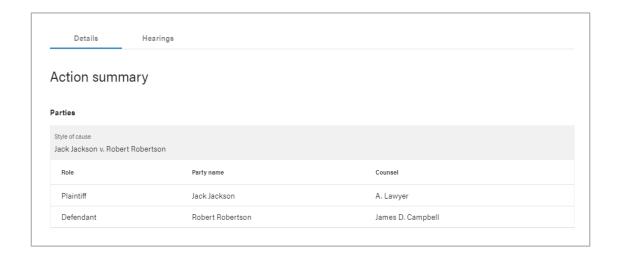
Step 5 - Joining as counsel to a named party

- If you are joining as counsel to a party of the action, select "Counsel" as your role.
- Select the party(ies) you represent.
- You can represent more than one party.
- More than one lawyer can represent any party listed.
- Once you have selected the party(ies)
 you represent, you must check the box
 and declare you are party to this action
 and click "Confirm" (as shown below).



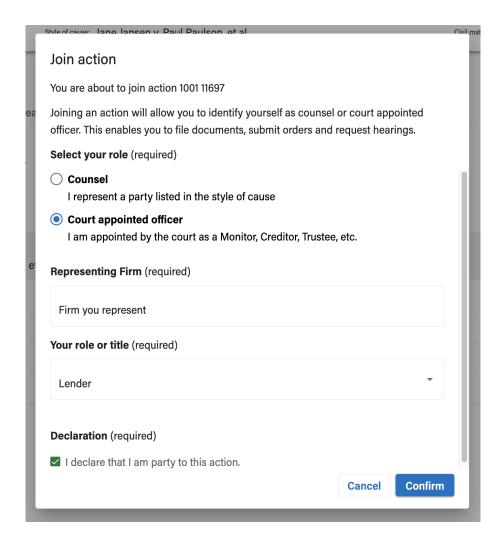
Step 6 - Review the action summary

- Review the updated action summary. Your name will now be associated with the party or parties you indicated.
- You will now have access to the hearing details of this action.
- You can now associate your materials to any hearing within this matter.



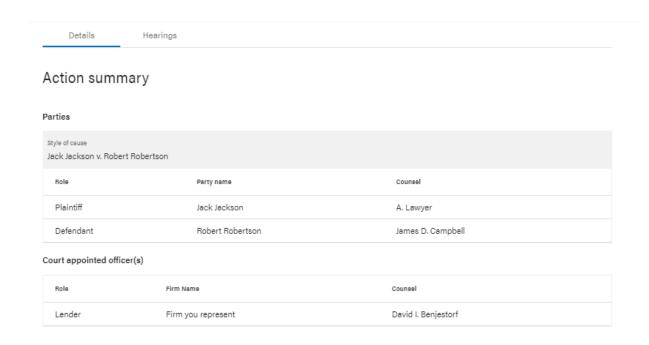
Step 7 - Joining as a court appointed officer

- To join as a court appointed officer, select "Court appointed officer" as your role.
- Indicate the **firm you represent**.
- Select the role you have been **appointed to by the Court**.
- Once you have selected the role you have been appointed to, you must check the box and declare you are party to this action and click "Confirm" (as shown below).



Step 8 - Review the action summary

- Review the updated action summary. Your name will now be associated with the party(ies) you indicated.
- You now have access to hearing details.
- You can now associate your material(s) to any hearings within this action.



If you see your name listed beside the appropriate party(ies) you've associated yourself with, you have now successfully joined the action (as shown above).

Associating Materials to Hearings

Requirements

Starting March 6, 2023 it will be mandatory to associate materials. All materials must be associated to the hearing no later than the Tuesday of the week prior to the hearing date.

- You must have joined an action in order to be able to associate materials to a hearing.
- If you have not joined an action, please refer to the instructions to **join an action first**.
- Confidential materials must not be associated to a hearing in CCM. If you have confidential material, please advise the court coordinator.
- All documents associated must follow a naming convention (see document naming convention table below).
- Once associated, documents cannot be removed.

Getting started

Step 1 - Locate the matter

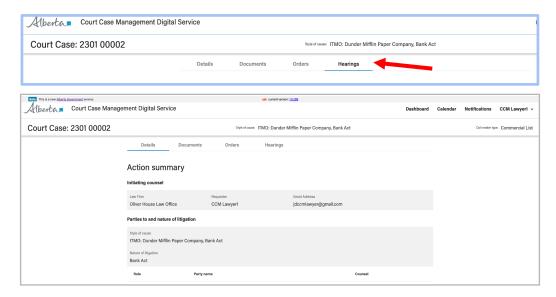
Once you are a party to an action (you have joined the action or were the one who initiated it), you will be able to associate material directly to that hearing so that a Justice has visibility of those material(s) in preparation for the upcoming hearing.

- Locate the matter in your "Actions" tab.
- You must have first joined an action to be able to see the matter in your actions tab. If you have not yet joined the action, please refer to the "**Join an action**" instructions so you can join the action and associate your materials.



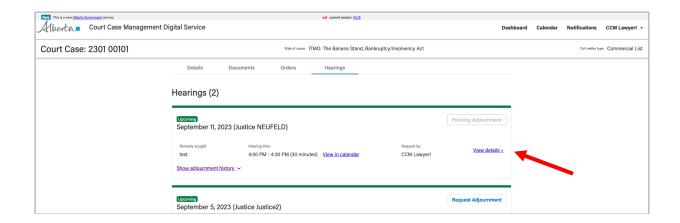
Upon entering your court case, you will first land on the action details summary. From there you can **navigate to the hearings tab** to view a list of hearings pertaining to this matter.

Here, you can view the specific hearing(s) you wish to associate materials to.



Step 2 - Locate the hearing you wish to associate materials to

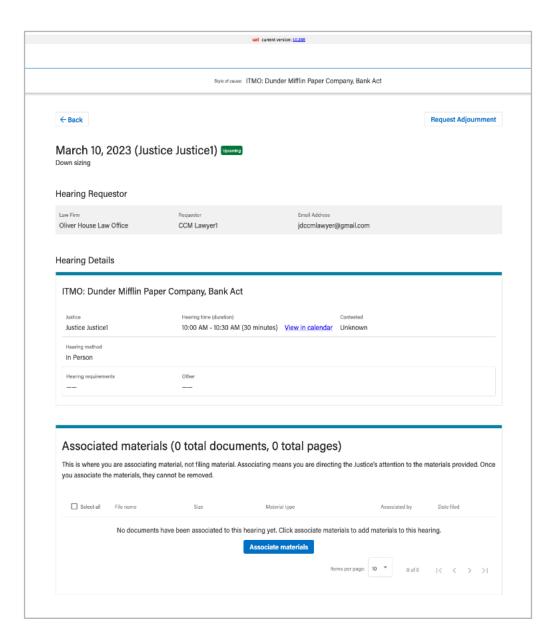
In the "**Hearings**" tab locate the hearing you wish to associate materials to and click "**View details**" to view the hearing details.



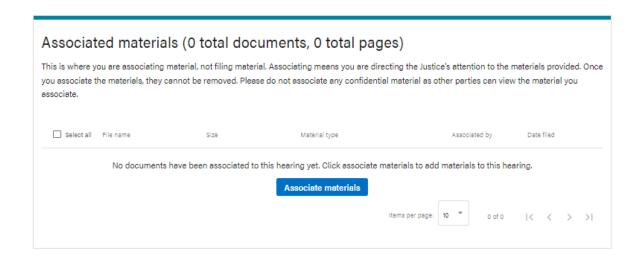
Step 3 - Find the associate materials table in that hearing

Once you are in the hearing details view of an upcoming hearing pertaining to your court case, scroll to the bottom of the page to view the **associated materials**.

You can associate materials to that specific hearing from within the 'Associated materials' table.

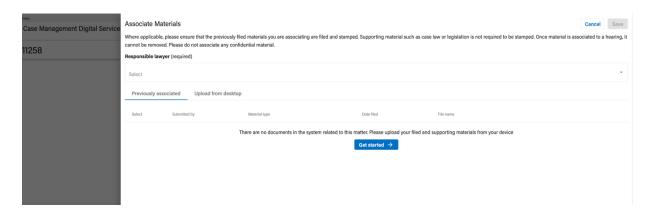


To begin to associate materials, click on "Associate materials" (see below).



Step 4 - Start associating materials

If no materials have yet to be associated with the upcoming hearing, you can start associating materials by clicking the **associate materials** button. Once you click associate materials, a shelf will appear on the screen.

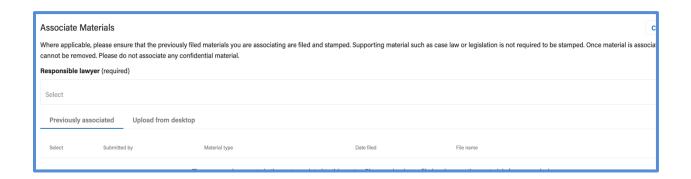


Note: If you are a legal assistant, you will need to select the responsible lawyer you wish to associate materials on behalf of. For lawyers, this will default to your name if you are associating materials.

There are **two(2)** tabs in which a user can associate materials to the hearing, those being:

• **Previously associated** - previously associated allows users to re-associate materials (documents and orders) that were associated to a previous hearing within the same action.

• **Upload from desktop** - uploading from your desktop allows users to add any previously filed materials or additional supporting materials that exist or have been downloaded to the user's device so that they can upload those files directly to CCM.



Important note: Please note that associating materials to a hearing in this service is **not to be confused with digital filing.** Associating materials is to allow users to bring those materials that have already been filed and any additional supporting materials to the Justice's attention.

Associated material naming convention

Please ensure that all associated materials uploaded meet the document naming convention requirements. (See table below)

Document Type	Naming convention
Affidavits	Name of affiant - Date Sworn Ex: Jane Doe - Sworn January 10, 2023
Briefs	Party type - Type of brief Ex: Applicant - Reply Brief
Transcripts	Type of transcript - Name of deposed - Date deposed Ex: Cross Examination of Jane Doe - Deposed Dec 5, 2022
All other documents	Document name, party name Ex: Originating application, The Company I represent

Confidential materials

Confidential material cannot be associated using the associated materials table. If you have confidential material that needs to be included, please advise the civil specials court coordinator.

Associate materials (Previously associated)

When pulling from **previously associated materials** within an action to associate material that was previously associated to a hearing, a user can select each checkbox of the desired material(s) to associate as needed and click save when ready.

Materials that have already been associated to the hearing by you or another user will be marked as "Assoc" instead of displaying a checkbox. (See next page)



Note: Once saved, a user cannot remove an associated document from the hearing. To do so you must contact support at <u>JSG.Courtcasemanagementsupport@gov.ab.ca</u>

Associate materials (Upload from desktop)

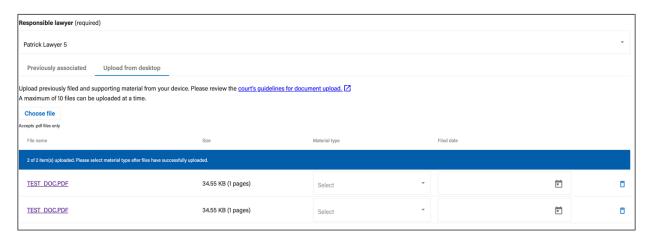
When **uploading from your desktop** to associate previously filed materials or supporting materials, a user can upload files by either clicking the **choose file** button or clicking into the large drag and drop area. **Please note that the system only accepts .pdf files**



Note: drag PDF files directly from your desktop into the drag and drop area outlined above.

If a specific file encounters an error upon uploading, an error message will be displayed.

When uploading files, a user can **select up to 10 files at a time** to upload in bulk. Once the files have been loaded in the queue, the user can continue to upload more files until they are ready to proceed with saving the associated materials.

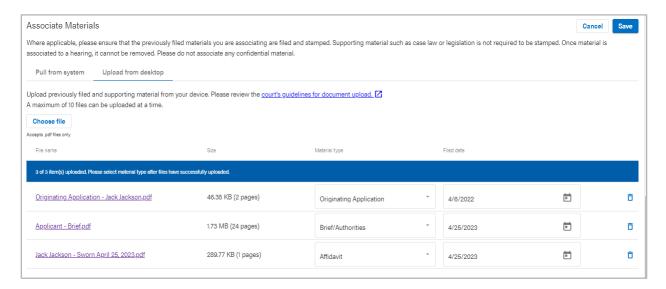


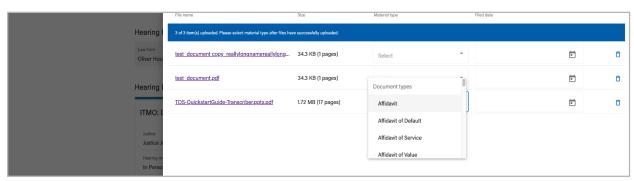
Note: Once saved, a user cannot remove an associated document from the hearing. To do so you must contact support at <u>JSG.Courtcasemanagementsupport@gov.ab.ca</u>

Step 5 - Identify material type

- Identify the material type in the "Material type" drop down.
- Indicate the date that the document(s) was filed.

- You do **not** need to indicate a filed date for materials such as:
 - Correspondence
 - Or supporting material, such as case law
- If the document type is not available in the drop-down, please associate it as "Supporting material", and email <u>JSG.Courtcasemanagementsupport@gov.ab.ca</u> to advise that your document type is unavailable.





Step 6 - Save materials, acknowledge, and confirm

Acknowledge that you would like to associate the materials to the hearing, that you **cannot remove** the materials, and you have not associated any confidential materials.

Acknowledgment of associated materials Please acknowledge that you would like to associate the uploaded materials to this hearing. I acknowledge that the uploaded material(s) cannot be removed once associated and I acknowledge that there are no confidential materials associated. Back Confirm

Note: Once saved, a user cannot remove an associated document from the hearing. To do so you must contact support at <u>JSG.Courtcasemanagementsupport@gov.ab.ca</u>

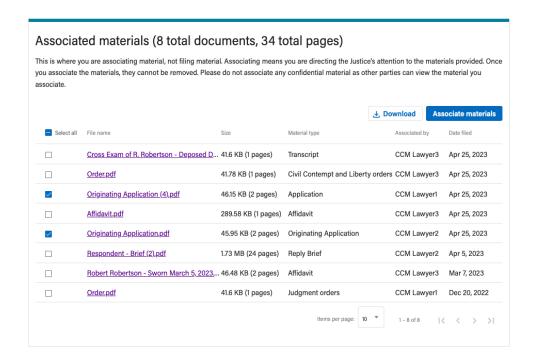
Step 7 - Reviewing the associated materials table

You can now view the materials you associated to your hearing. If associated materials have been added to a hearing, then those documents will be listed within the hearing details for users to view or download under the associated materials table.

- 1. To **view**, click the file name of a document, which will open the PDF in a new browser tab.
- 2. To **download** associated material, a user can select one(1) or multiple items using the checkboxes to the left of the file name.
- 3. A **select all** check box is also available if a user decides to download all the material associated to the matter.

All parties have a shared view of associated materials, increasing transparency between parties as well as judiciary and the courts. This includes judiciary, clerks, coordinators and any parties that have joined this action. **If counsel does not associate their materials**, the judiciary will not be able to properly prepare for the hearing.

If the judiciary is unable to prepare for the hearing, it may be adjourned.



Important note: If you are finding that you are missing material for your upcoming hearing, please contact counsel directly or contact <u>JSG.Courtcasemanagementsupport@gov.ab.ca</u> if it is a system related issue.

Step 8 - Transparency between parties

As other parties associate their materials to the hearing, it will become visible to you too.

Important note: All parties have a shared view of associated materials. This includes judiciary, clerks, coordinators and any parties that have joined this action. If you do not associate your materials, the judiciary will not be able to prepare for your hearing. If the judiciary is unable to prepare for your hearing, it may be adjourned. If you cannot associate your materials, please contact JSG.Courtcasemanagementsupport@gov.ab.ca

Justice Requesting Materials in CCM

When preparing for an upcoming hearing, if the assigned Justice requires material that you or other counsel(s) did not or have not yet provided under the "Associated materials" table in CCM, a Justice can send a **request directly to counsel(s) for additional materials.**

- 1. After the Justice sends the request to counsel(s) from CCM, **you and all other counsel(s)** who have joined the matter will receive an **email notification** that summarizes the request for material(s) sent by that Justice
- 2. If the request for material(s) is addressed to you or your law firm, counsel **must** comply and upload the materials requested (if possible). When you associate material, you will notify the Justice that new material has been **associated to the hearing in CCM**
- 3. The Justice will receive a summary of the materials they requested from you and/or other counsel(s)

Important note: All parties who have **joined the action in CCM will be notified** when a Justice makes a request for material(s)

Justice CCM Justice2 is requesting the following material(s) for an upcoming hearing on March 08, 2024

The following parties have been requested to provide additional material(s) by January 31, 2024:

• CCM Lawyer1 representing Dunder Mifflin

Please see the following message as sent by the justice: Type here the materials you would like counsel to provide.

"Please provide the Affidavit of XXXX, sworn on XX/XX/XXXX"

If you cannot provide the material by the deadline outlined above, please contact the Justice's judicial assistant.

If you are not one of the parties who material is being requested from, no further action is required. This message is sent as a notification to all parties who have joined the action.

Note: Justice assignment is subject to change.

Please note, this is a notification service only. CCM will not receive any replied to this message.

If you have any questions or require assistance, please contact jsg. courtcasemanagementsupport@gov.ab.ca

Contact Us

We greatly appreciate your feedback as we release this version of the CCM service.

All questions and comments are welcome as they will help us improve the system. We thank you in advance for your feedback and cooperation.

For general support & feedback: JSG.Courtcasemanagementsupport@gov.ab.ca

Please include the following in your email:

- Screenshots of the issue
- The date and time you encountered the issue
- One of the following tags in the subject line:
 - Usability issue
 - o Bug
 - Feature request
 - o General feedback
 - Support Question

For more information about Court Case Management Digital Service, please contact:

Michelle Thayer

Product Owner
Justice Digital
Court & Justice Services
michelle.thayer2@gov.ab.ca