User manual (Portal) Office of the Chief Justice Court Online System

Version: 1.0
Date:

OFFICE OF THE CHIEF JUSTICE
REPUBLIC OF SOUTH AFRICA

Notice

Copyright © 2021, SITA SOC Ltd (Registration no.: 1999/001899/30). All rights reserved. No part of this document may be reproduced or transmitted in any form or by any means without the express written permission of SITA SOC Ltd.

Document enquiries can be directed to:
Configuration Management Office
SITA SOC Ltd
PO Box 26100, Monument Park, 0105, South Africa
Attention: SITA DRM – sitadrm@sita.co.za
Telephone: 012 482 3041
www.sita.co.za

Title: Court Online Portal User Manual
No.: eOCJC-00001
Author/originator: Slindile Moeti – silindle.moeti@sita.co.za

Amendment history

Version	Date	Change proposal	Change comment
1.00	2021-08-10	New document	First release

Approval page



SITA: Senior Manager: Application Training (Acting) – L Makgolela

2022/07/26

Date

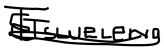


SITA: Author: Specialist ETDP – S Moeti

2022/07/26

Date

Client approval



OCJ Project Manager: Tebogo Tsweleng

2022/08/15

Date

Noted



Director of Court Administration: Michael Ndlokovane

2022/09/21

Date

Table of contents

Table of contents 4
Abbreviations 8
Terms and Definitions 9
CHAPTER 1 - LAYOUT OF THE MANUAL 10
1. Purpose and layout of the user manual 10
2. References 11
3. Typographical conventions 11
CHAPTER 2 - ADMINISTRATION 12
Section 1- The Judiciary screen 13
1. Introduction 13
2. Accessing the Portal 13
3. The Daily Court Roll screen 15
Section 2- Register as an Individual 17
1. Description 17
2. Registering as an individual 17
3. My Profile 22
3.1 Purpose of the Profile 22
3.2 How to access to the Individual Profile screen 22
Section 3 - Register an Organisation 24
1. Description 24
2. Process to register an Organisation 24
3. Organisational Profile Management 30
4. Manage members 31
Section 4- Contact Us 35
1. Description 35
2. Process flow for Contact Us 35
Section 5 - Sign in 38
3. Sign in 38
4. Process to Sign in 38
Section 6 - Forgot password 41
1. Password 41
2. Reset Password 41
CHAPTER 3 - LODGING AND JOINING A CASE 43

Section 1- Start a case 44
1. Start a case 44
2. Notifications 48
2.1 Change notification options 48
2.2 View notification 50
2.3 Urgent cases 50
Section 2- Accessing and joining cases 52
1. Description 52
2. Add a litigant to a case 52
3. Access a case 53
CHAPTER 4 - CASE LIFECYCLE 59
Section 1- Filing a Document 60
1. Description 60
2. Submit a document 60
3. Court Rules 64
Section 2 - Pleadings 66
1. Description 66
1. Description 70
1. Description 73
2. Create an event and bundles 73
1. Description 81
2. The trial screen 81
Section 6- Motion case 83
1. Description 83
2. Filing of Documents 83
3. Process to submit a document 83
4. Exchange of documents 84
5. Set Down 86
6. Ready for hearing 86
7. Hearing 87
8. Post Hearing 88
Section 7- Appeal case 89
1. Description 89
2. Filing of documents 89
3. Submit a Document 90
4. Filing Stage 90

5. Heads 91
6. Appeal Hearing 91
7. Post Appeal Hearing 92
Section 8- Taxation 93
1. Description 93
2. Upload settled bills 94
3. File notice of intention to tax bill of costs 97
4. Notice of objection to tax bill of costs 99
5. Process to file Notice of objection to tax bill of costs 99
6. Application for Taxation hearing 101
Section 9- Closed cases 104
1. Description 104

Table of tables

Table 1 - User manual layout 10
Table 2 - Typographical conventions 11

Abbreviations

OCJ	Office of the Chief Justice
DJP	Deputy Judge President
SITA	State Information Technology Agency
ETDP	Education Training and Development Practices

Terms and Definitions

Court day(s)	A normal working day (business hours) for the court. In terms of Rule 3 of the Uniform Rules of Court: 3 Registrar's Office Hours Except on Saturdays, Sundays and Public Holidays, the offices of the registrar shall be open from 9:00 to 13:00 and from 14:00 to 16:00, save that, for the purpose of issuing any process or filing any document, other than a notice of intention to defend, the offices shall be open from 9:00 to 13:00, and from 14:00 to 15:00.

Chapter 1- Layout of the manual

1. Purpose and layout of the user manual

This user manual is intended for officials at the Office of the Chief Justice (OCJ). It is the main reference document for the OCJ e-Filing Solution.

The manual is meant to be used as a reference document on how to use the system.

The layout of the user manual is indicated in table 1 below:

Table 1 - User manual layout

Chapter	Section
Chapter 1 – Layout of the manual	Layout of the manual
Chapter 2 – Administration	Section 1 – Home Page
	Section 2 – Register as an Individual
	Section 3 – Register an Organisation
	Section 4 – Contact us
	Section 5 – Sign in
	Section 6 – Forgot Password
Chapter 3 – Lodging and Joining a Case	Section 1 – Start a Case
	Section 2 – Accessing and Joining a Case
Chapter 4 – Case Lifecycle	Section 1 – Filing a Document
	Section 2 – Pleading
	Section 3 – Applying for Hearing
	Section 4 – Creating Events and Bundles

Chapter	Section
	Section 5 – Trial
	Section 6 – Motion
	Section 7 – Appeal
	Section 8 – Taxation
	Section 9 – Closed Case

2. References

a) Functional Design Document Version 2.8

b) Functional Requirements Document Version 2.0



The latest revision of a document applies.

3. Typographical conventions

The typographical conventions used in this document are described in the table below:

Table 2 - Typographical conventions

Convention	Object or term	Example
Bold	Window, dialog box or screen name	The **Notepad** window will be displayed.
	Message as it is displayed on the window or screen	A message, **Click here to begin**, will be displayed.
	Button or option in a dialog box, toolbar, window or screen	Click on the **SUBMIT** button.
	Indication of a note	You can also display the …
Screens	Some screens are omitted to avoid repetition	Follow the steps indicated.

Chapter 2- Administration

This chapter consists of the sections listed below.

(a) Section 1 – Home Page

(b) Section 2 – Register as an Individual

(c) Section 3 – Register an Organisation

(d) Section 4 – Contact us

(e) Section 5 – Sign in

(f) Section 6 – Forgot Password

Section 1- The Judiciary screen

1. Introduction

A user of the Portal must be a registered. The log in credentials created during the registration process must be used whenever the user wants to access the Portal.

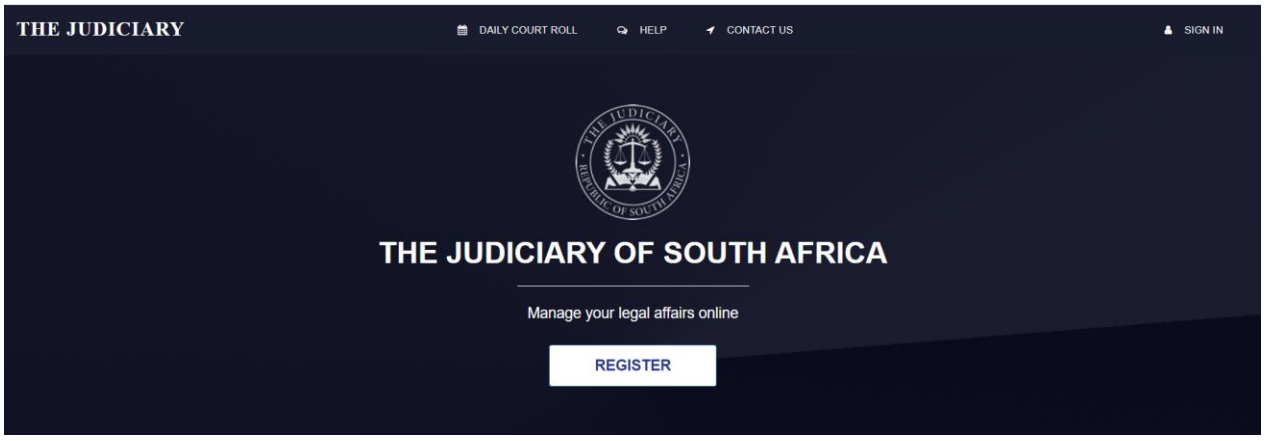
The Judiciary screen which is the home page provides general information about access to the entire Portal. This include information about Frequently Asked Questions, Contact Us, registration and Video.

This allows a user to contact the Office of the Chief Justice in a contact form, to register for access to the Digital filing system. Register dialog screen is presented to the user to provide them with the option of registering as an Individual or as an Organisation. Video Provides a brief animation of how to start with the Legal Digital Filing system. When using this Portal, the individual should be a registered user of the e-Registry Portal and must have the sign in credentials to access the Portal.

2. Accessing the Portal

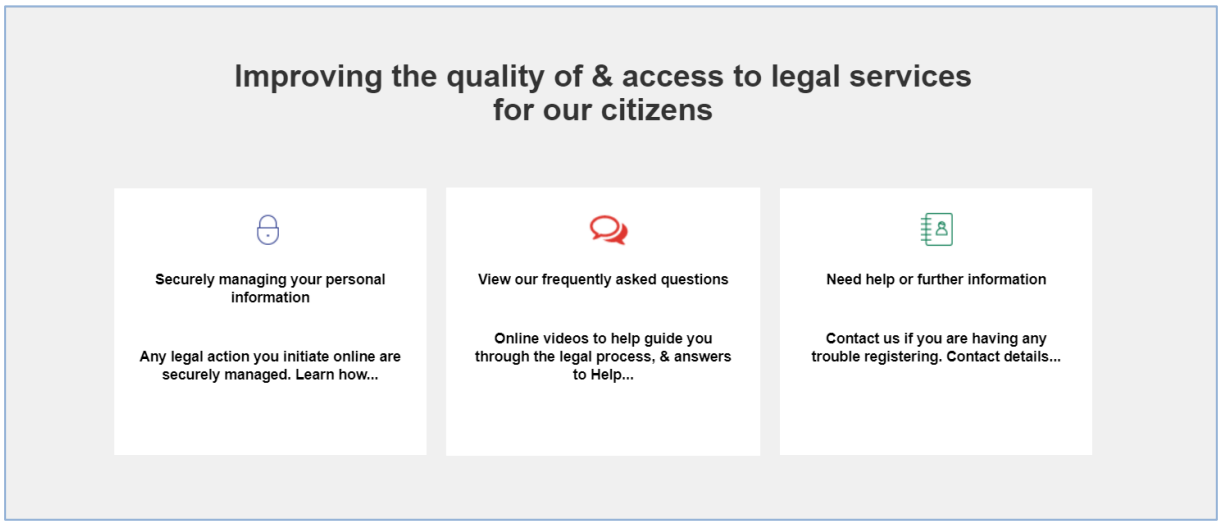
1. Navigate to the Portal website in your browser using the portal website provided. The Judiciary landing page will be displayed as illustrated.

Figure 1 - Portal Landing page



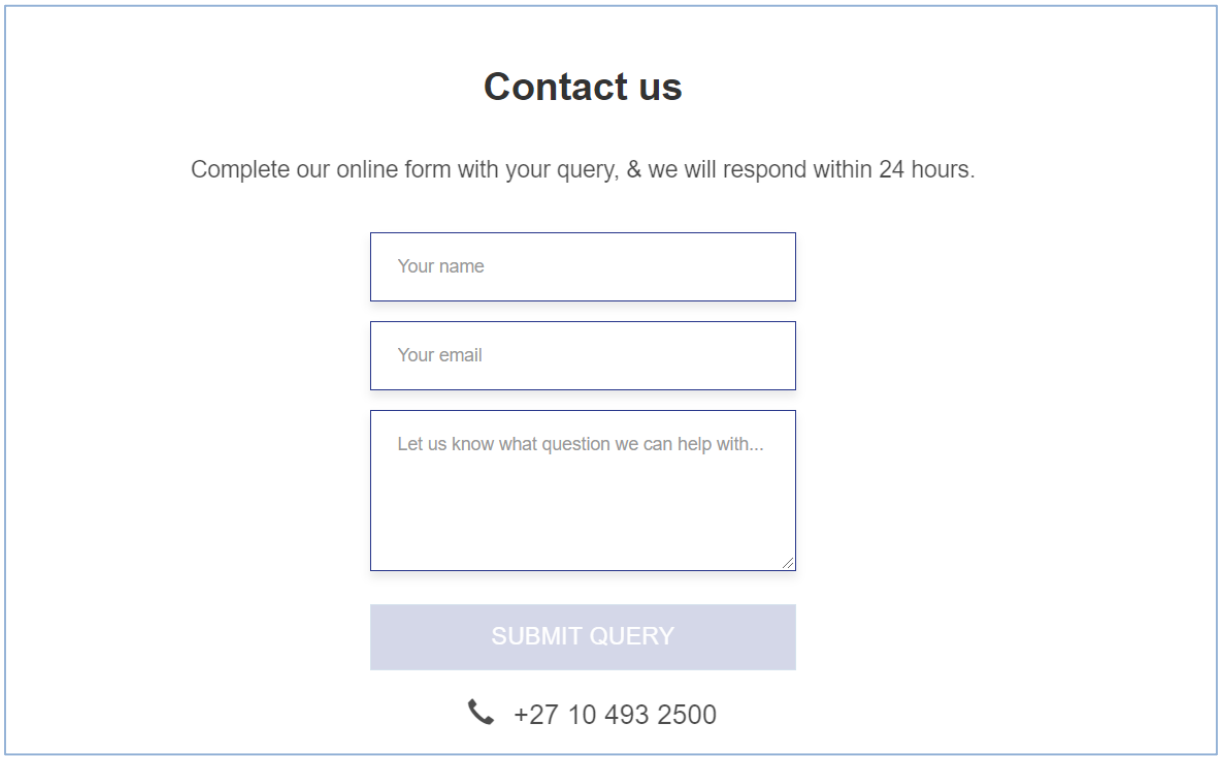
2. This is where you can register both as an individual or an organisation and access the daily court roll.
3. Scroll down to the next screen, where the FAQs and the help options screens may be accessed.

Figure 2 - Portal landing page second screen



4. Scroll down to the next screen, where the **Contact us** screen may be accessed.
5. This is the **Contact us** screen where a user can complete an online form with their query and submit their query which will be responded to in 24 hours

Figure 3 - Contact us screen



3. The Daily Court Roll screen

The **Daily court roll** screen displays the court schedule for a specific date.

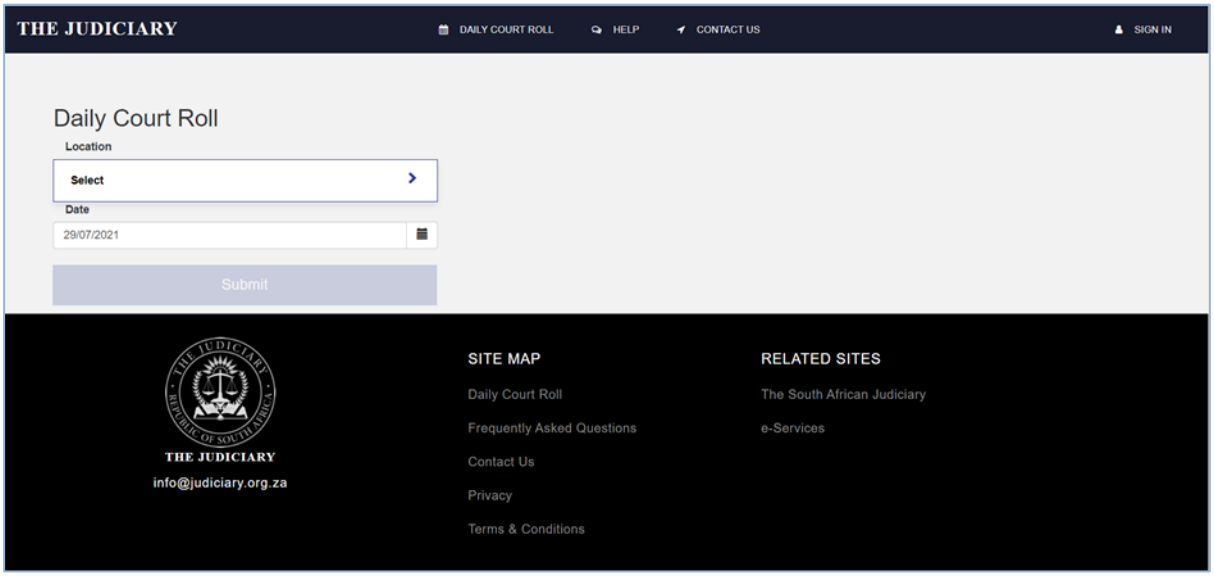
1. From the Judiciary screen, click on the **Daily court roll** button

Figure 4 - Daily court roll button



2. The **Daily court roll** screen will be displayed as shown below

Figure 5 - Daily court roll screen



3. Select the location of the court.
4. click on the calendar icon to select the date
5. Click on the **Submit** button
6. The court roll for the chosen date will be displayed

Notes

Section 2- Register as an Individual

1. Description

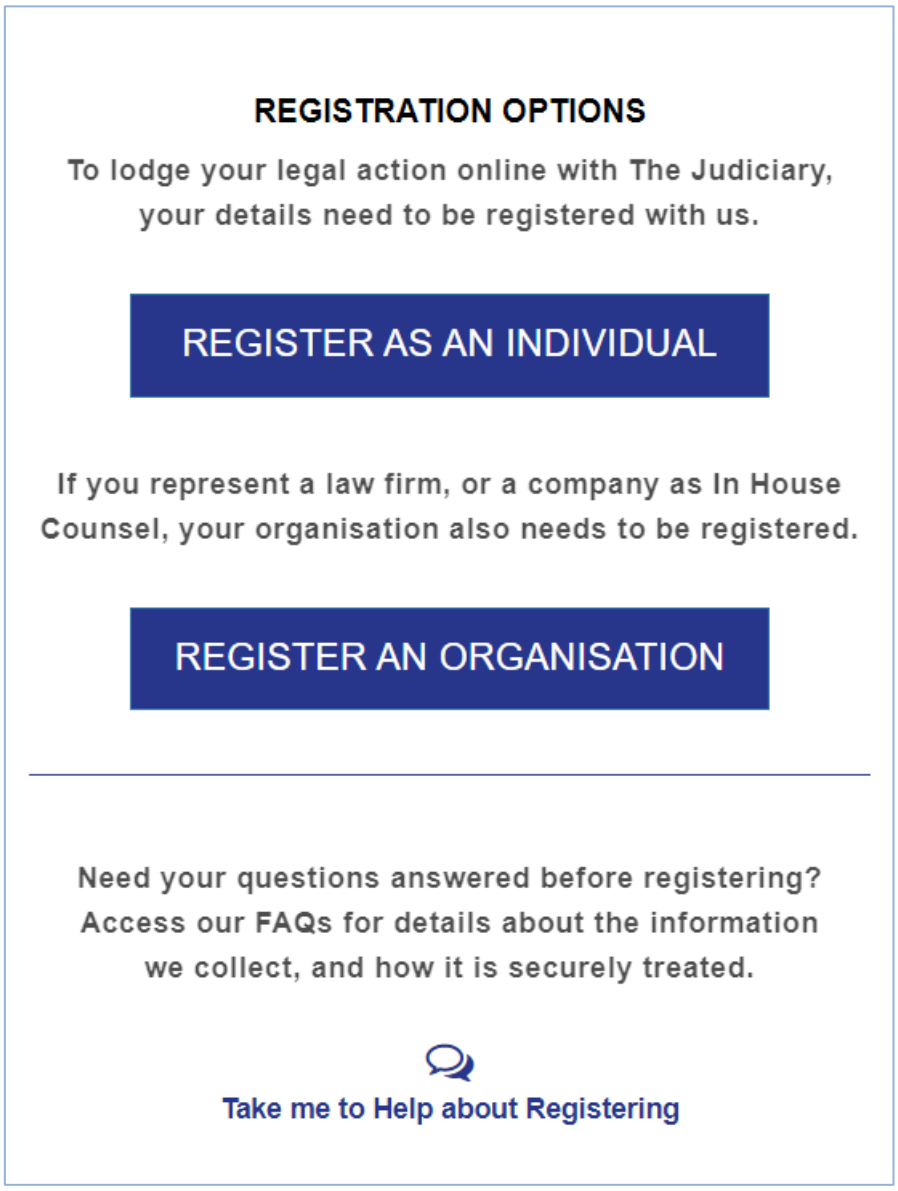
To lodge legal action online with The Judiciary, the details of an individual must be registered. Registration provides the ability to register an organisation or an individual. The initial step of registration is the registration option page. This will give a user an option to register as an individual and also as an organisation.

Click on the **Register** button on **The Judiciary** screen will take a user to the registration page.

2. Registering as an individual

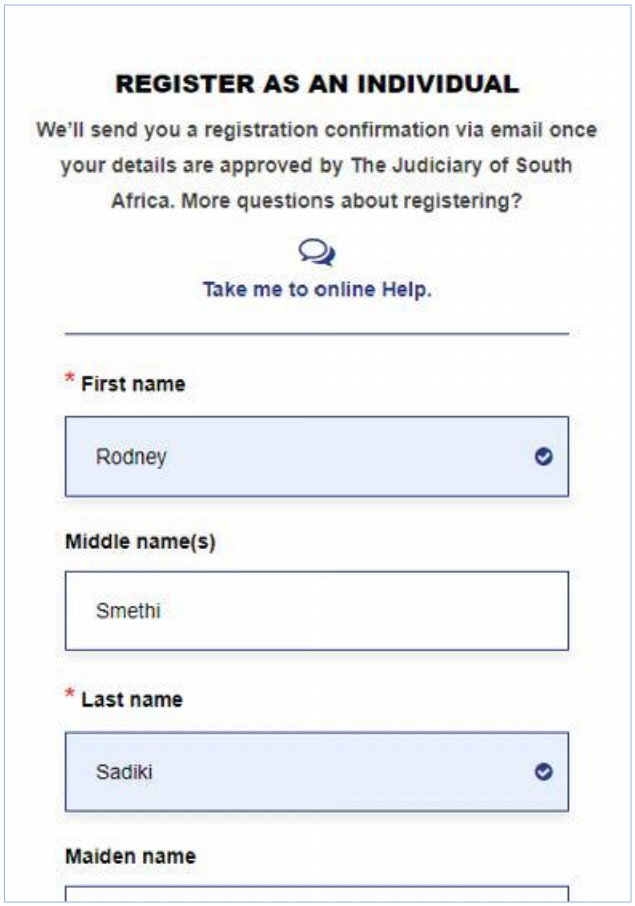
1. Click on the **Register** button
2. The **Registration options** screen will be displayed as shown below

Figure 6 - Registration options screen



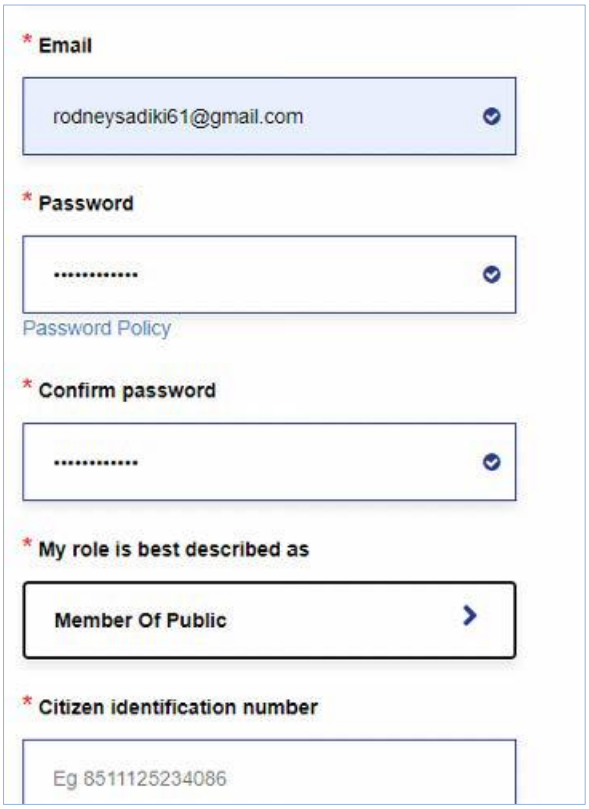
3. Click on the **Register as an individual** button.
4. The **Register as an individual** screen will be displayed.
5. Fill in all the mandatory fields on the screen as illustrated.

Figure 7 - Register as an individual screen



6. Continue filling in all the mandatory fields.

Figure 8 - Register as an individual screen



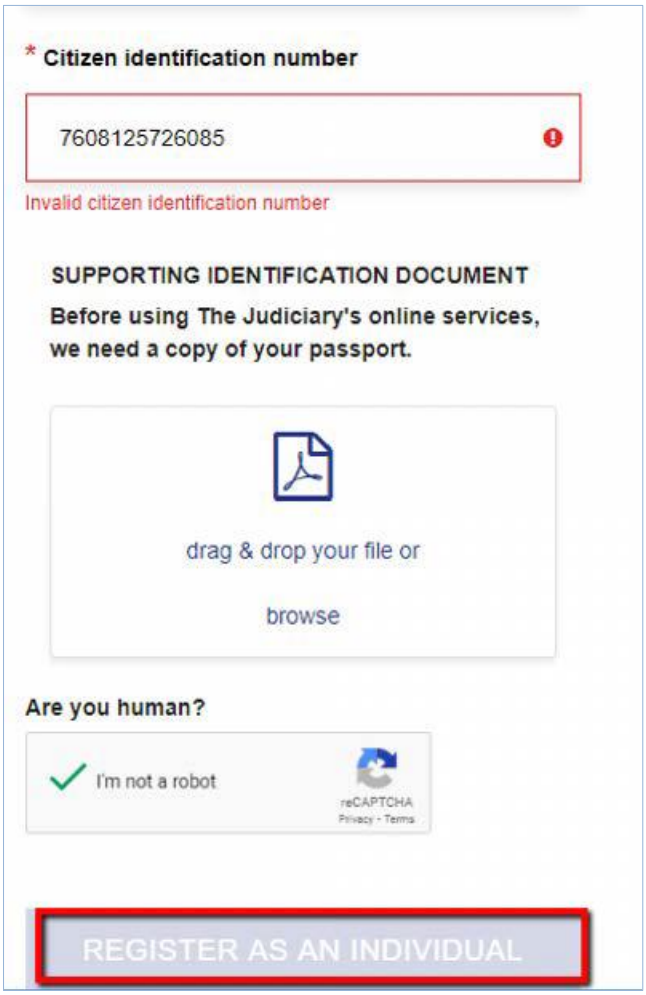
NOTE

The password criteria are as follows: password should contain both upper case and lower-case characters. Password must have digits and punctuation characters as well as letters, Password must be at least eight

The following should also be noted when on the drop-down list of "My role is best described as ". If the "representing myself" field is selected, there will be no further options, however if the "with a law firm or in-house legal team" field is selected, the name of the law firm and the Legal Practice Council (LPC) Number must be added. An Advocate belonging to chambers should select Law firm (No email restriction) and select the relevant chambers or law firm. An Advocate who does not belong to chambers should select Sole Practitioner/Advocate.

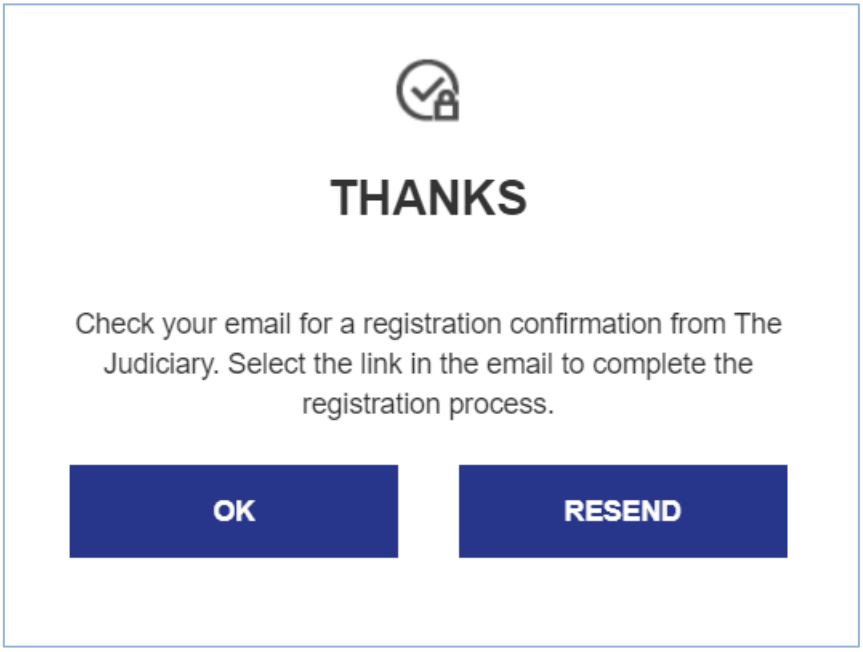
7. Continue capturing all the mandatory fields.

Figure 9 - Register as an individual screen



8. Capture a correct identification number in the Citizen Identification number field, the system validates the numbers.
9. If a passport is entered at the Citizen Identification number the copy of the passport must be attached.
10. Answer the question at the “Are you human? field
11. Click on **Register as an individual** button. The system will send a confirmation e-mail to the user with an activation link.

Figure 10 - Registration notification screen



12. Click on the **Ok** button to close the message box or click on the **Resend** button to have the link resend.

3. My Profile

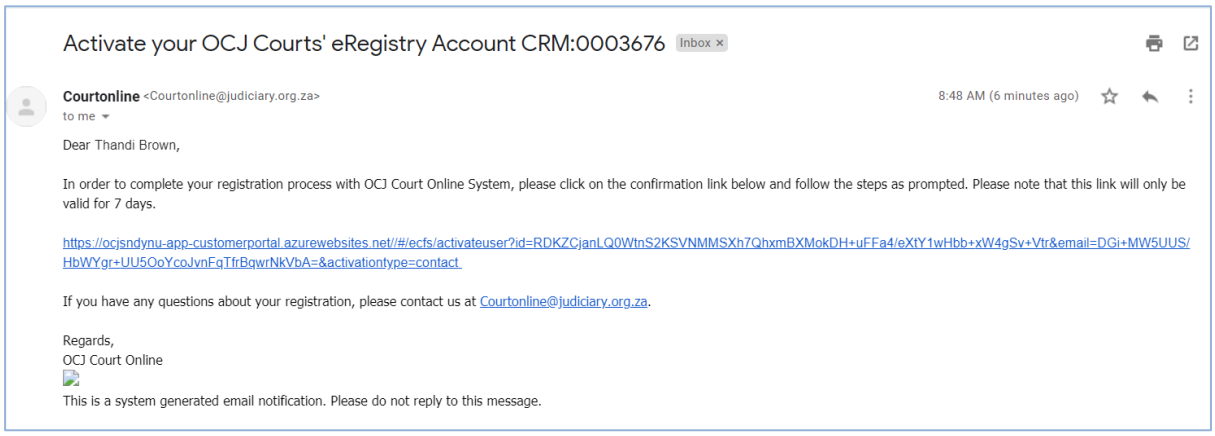
3.1 Purpose of the Profile

A user will receive profile activation email after completing individual profile registration screen. The individual profile displays the details that were entered by the user when they registered. The profile will display the personal details of the user, the contact details and the documentation uploaded by the user.

3.2 How to access to the Individual Profile screen

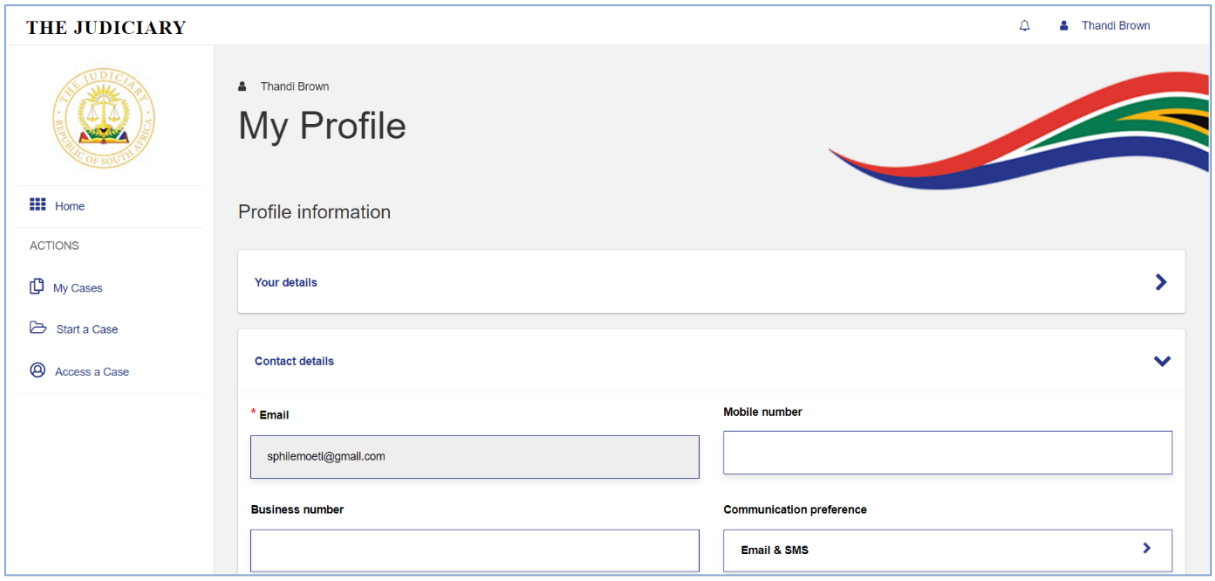
1. Click on Activation link in the e-mail received after registering.

Figure 11 - Activation email



2. Accept the terms and conditions.
3. The **My profile** window will display as shown below:

Figure 12 - Individual profile screen



4. Update all mandatory fields, indicated by the Asterisk (*).
5. Update any optional fields.
6. Upload ID Document or any other relevant documents.
7. Classify document from the type of document picklist.
8. Click **Save Changes**.

Section 3- Register an Organisation

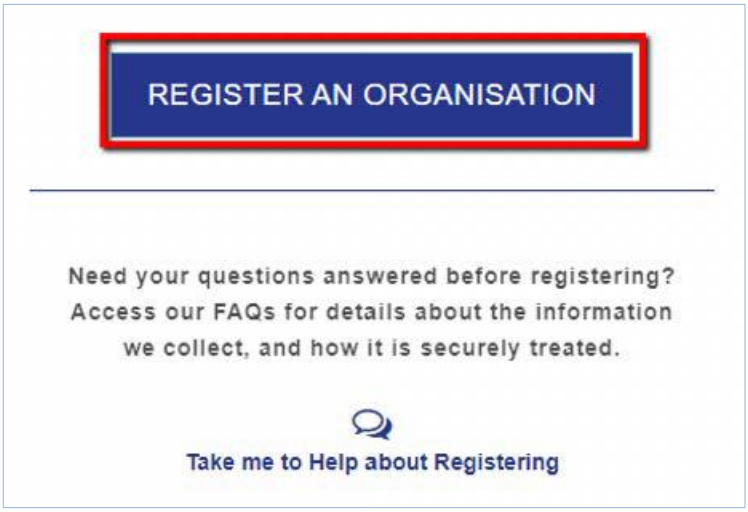
1. Description

The purpose of registering as an organisation is to register an organisation and all members associated with the organisation. This will display the details of the registered organisation and the administrators associated with that organisation. Only if the users are associated with the organisation will they be registered.

2. Process to register an Organisation

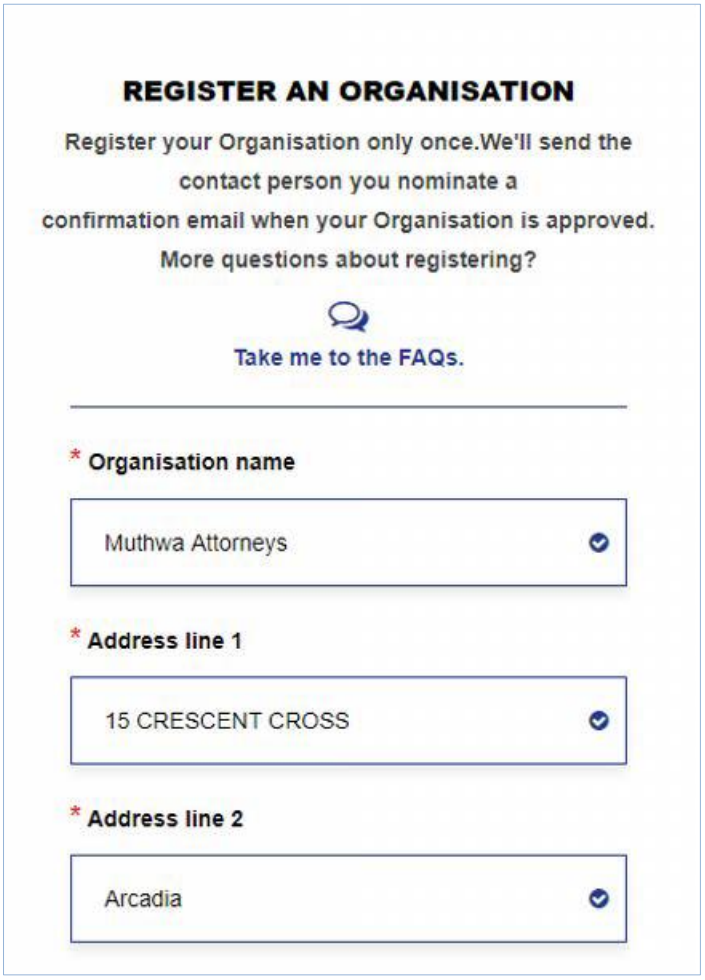
1. Click **Register** button on **The Judiciary** screen
2. Select **Register an organisation** button from the **Registration options** window as shown below

Figure 13 - Register an organization button



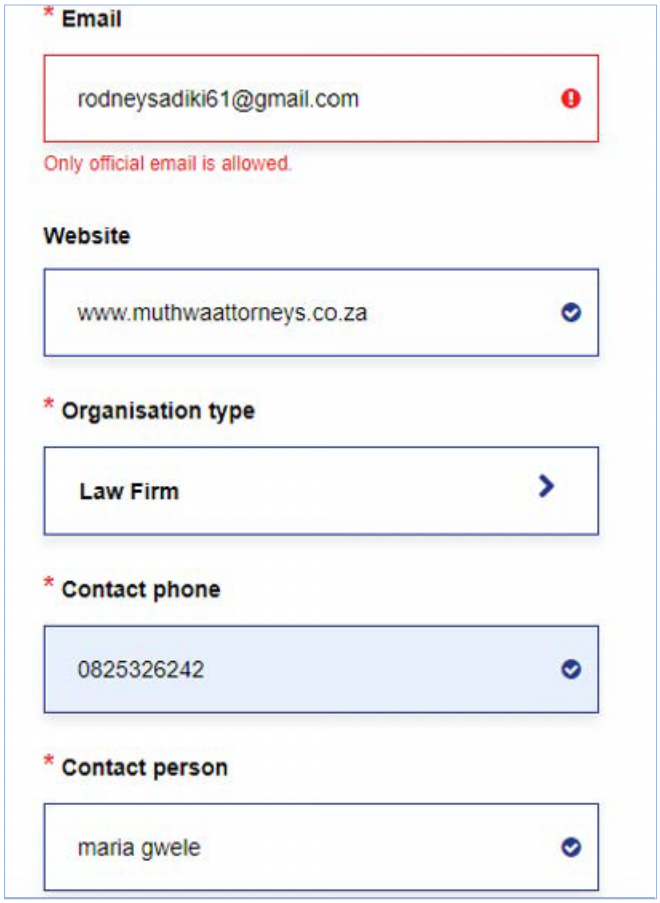
3. The **Register an organisation** screen will be displayed

Figure 14 - Register an organisation screen



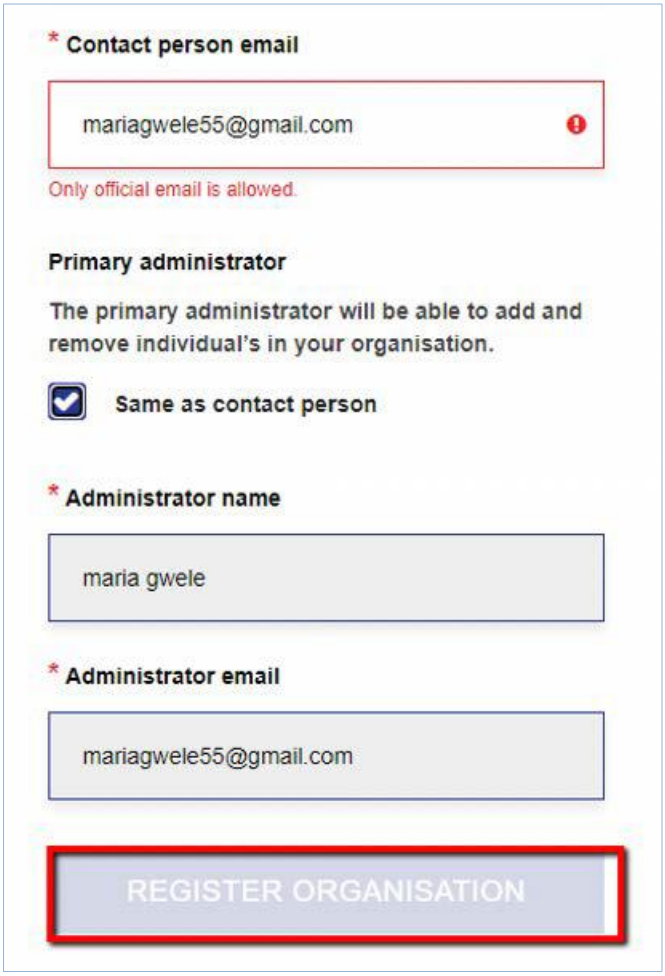
4. Capture the organisation name.
5. Capture address Line 1.
6. Capture address line 2.

Figure 15 - Register an organisation screen



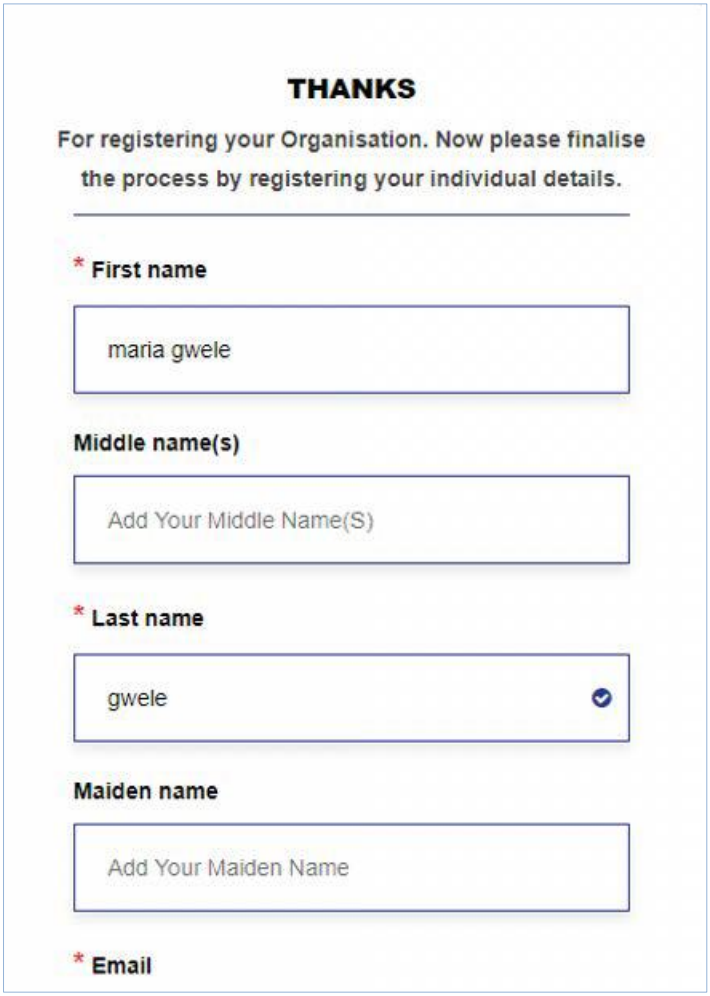
7. Capture the correct official email.
8. Capture the website of the organisation.
9. Select the organisation type.
10. Capture the contact Phone number.
11. Capture the contact person.
12. Proceed to the last part of the screen and complete all mandatory fields.

Figure 16 - Register an organisation screen



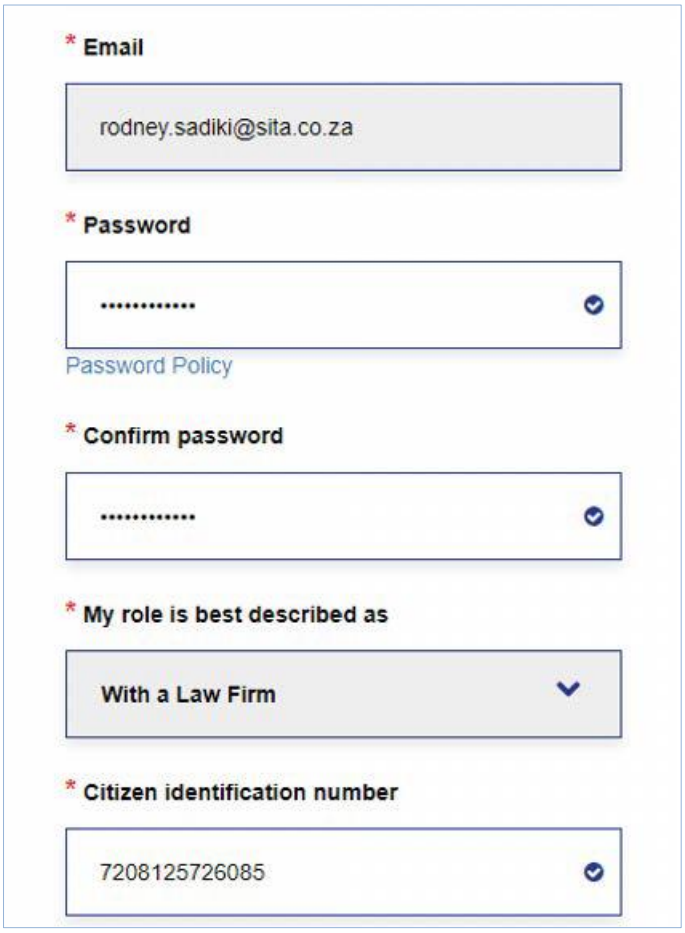
13. Capture the contact person email address.
14. Capture the name of the administrator of the organisation
15. Capture the administrator email address.
16. Click on **Register organisation** button, the screen will be displayed as illustrated below.

Figure 17 - Register an organisation screen



17. To finalise the registration the user must register as an individual as shown in Figure 17.

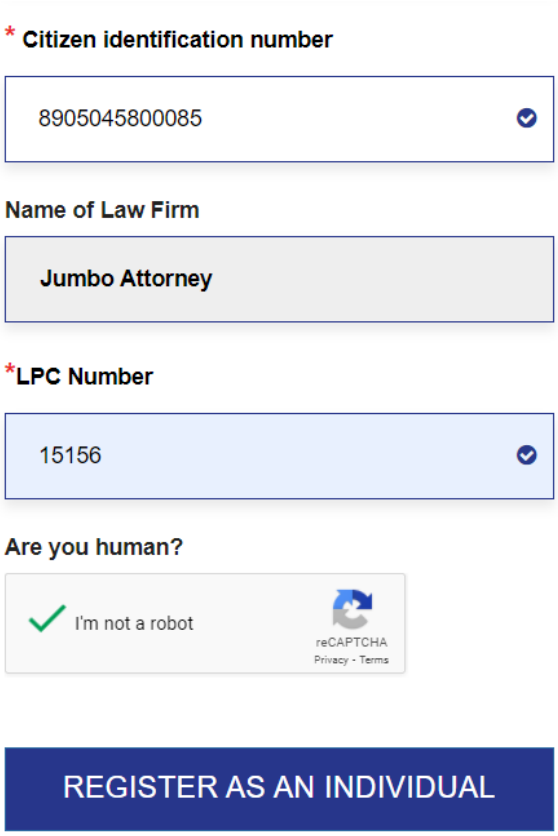
Figure 18 - Register an organisation screen



NOTE

The password criteria are as follows: password should contain both upper case and lower-case characters. Password must have digits and punctuation characters as well as letters, Password must be at least eight

Figure 19 - Register an organisation screen



18. Click on the **Register as an individual** button and the system will send a confirmation e-mail to the user with activation link.

3. Organisational Profile Management

1. Click on the **Activation** link in the e-mail received.
2. Accept terms and conditions.
3. Update all mandatory fields.
4. Update any optional fields.
5. Upload ID Document and other relevant documents.
6. Click on the **Save changes** button.
7. The system will update status to Submitted- Approval Pending.
8. The registration will be approved by the court registrar.

4. Manage members

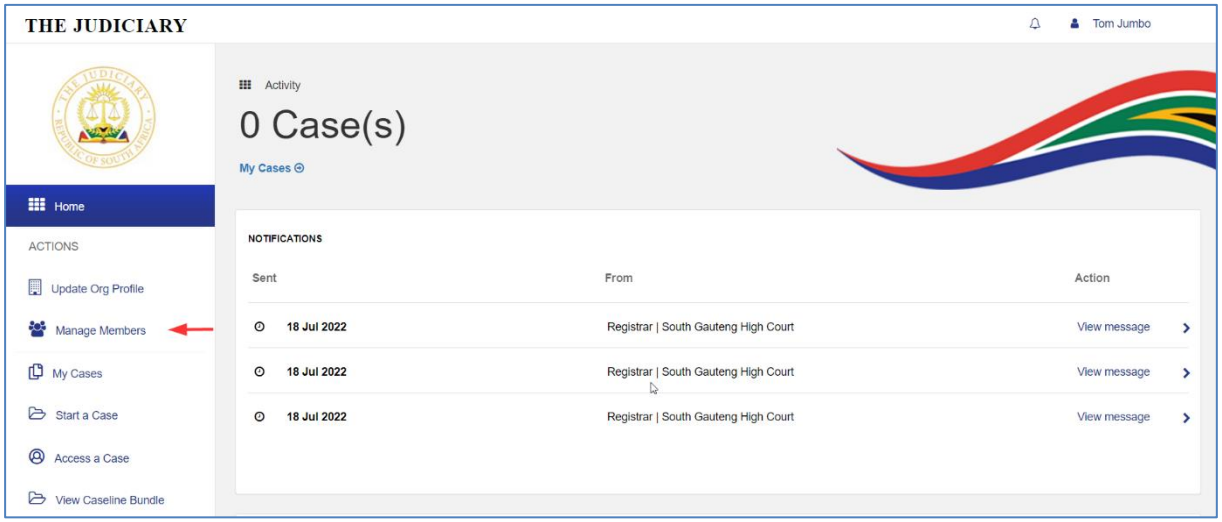
The user registered as the organisation's administrator has the role of managing users that register under the same organisation.

4.1 Add an administrator

The main administrator is able to assign the administrator role to other users registered under the same organisation.

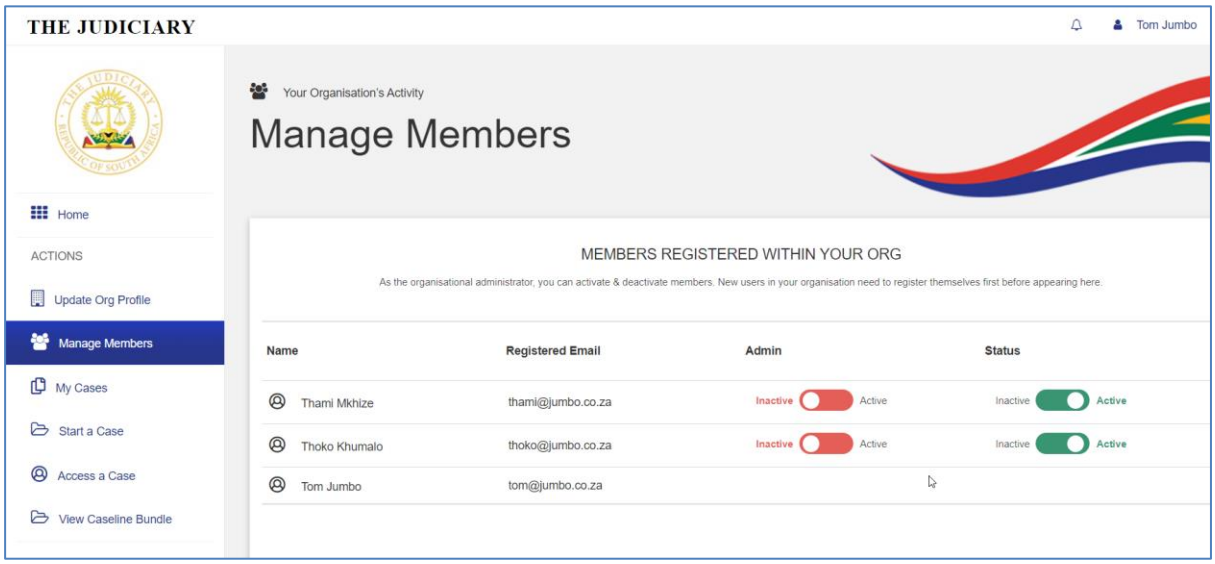
1. Sign in on the portal.
2. From the landing page click on **Manage members** as illustrated below.

Figure 20 - Administrator home page



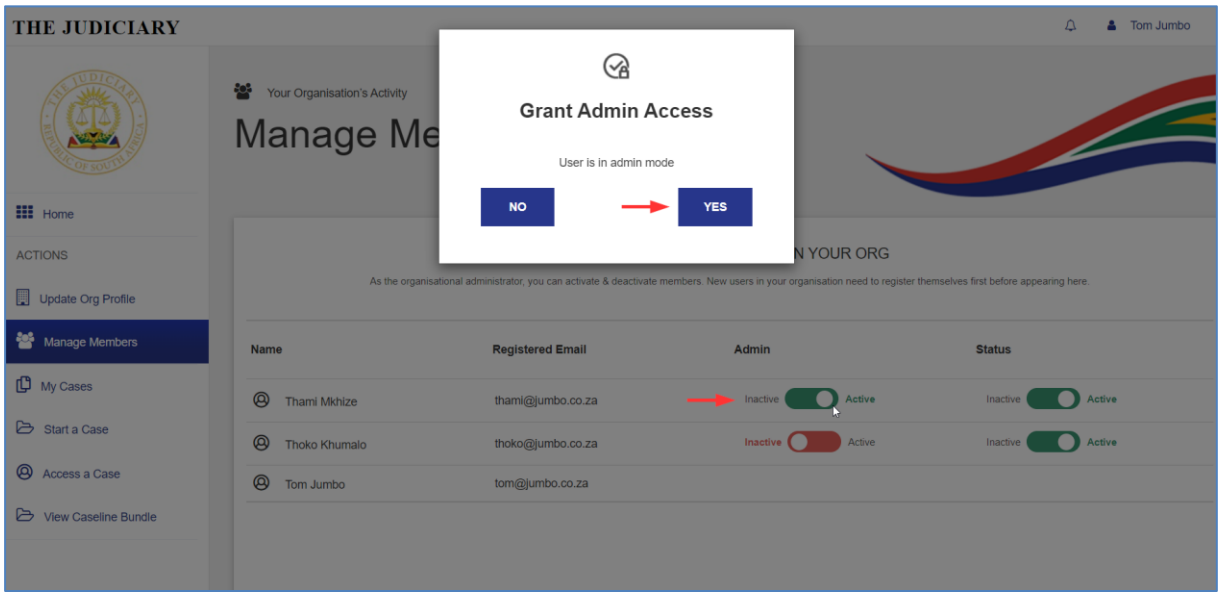
3. The **Manage members** window will be opened as illustrated below.

Figure 21 - Manage members window



4. Assign the administrator status to another user by activating the admin button.

Figure 22 – Active admin button

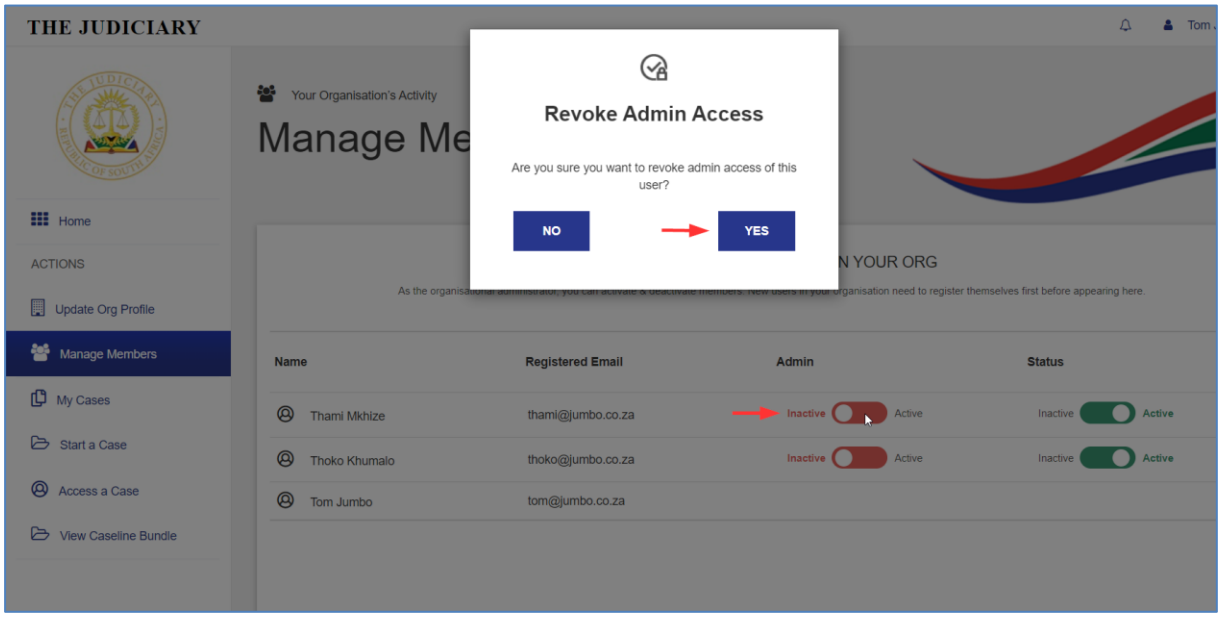


5. Click on the **Yes** button to grant admin access.
6. The user will be granted administrator rights.

4.2 Remove administrator rights from another member

The administrator can remove the administrator status from another user by de-activating the admin button.

Figure 23 - Inactive admin button



1. Click on the **Yes** button to revoke the administrator access from the user.
2. The user's administrator rights will be revoked.

NOTE

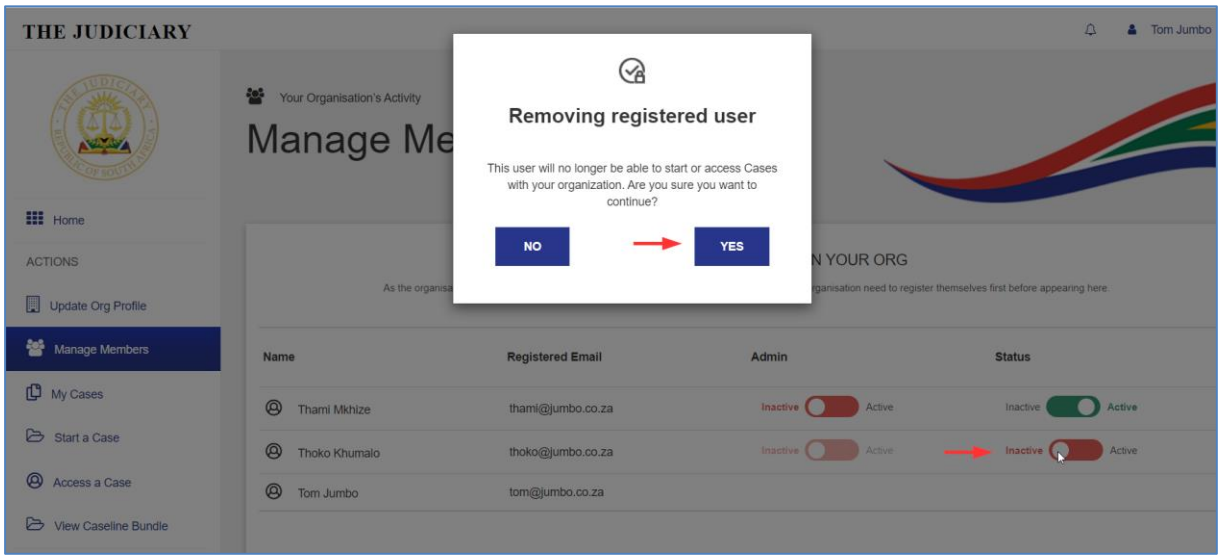
Only existing administrators of the registered law firm may add / remove other administrators.

4.3 De-Activate users

The administrator can deactivate users that no longer require access to the portal.

1. Click on **Manage members**.
2. Click on the status button to change it to inactive.
3. Click on **Yes** to confirm.

Figure 24 - Inactive status button



4. The user will no longer have access to the portal.

NOTE

An administrator cannot remove him / herself as administrator from the Portal

Section 4- Contact Us

1. Description

This is a platform where you submit your query, anything that you don't understand about the system so that you can get clarity.

2. Process flow for Contact Us

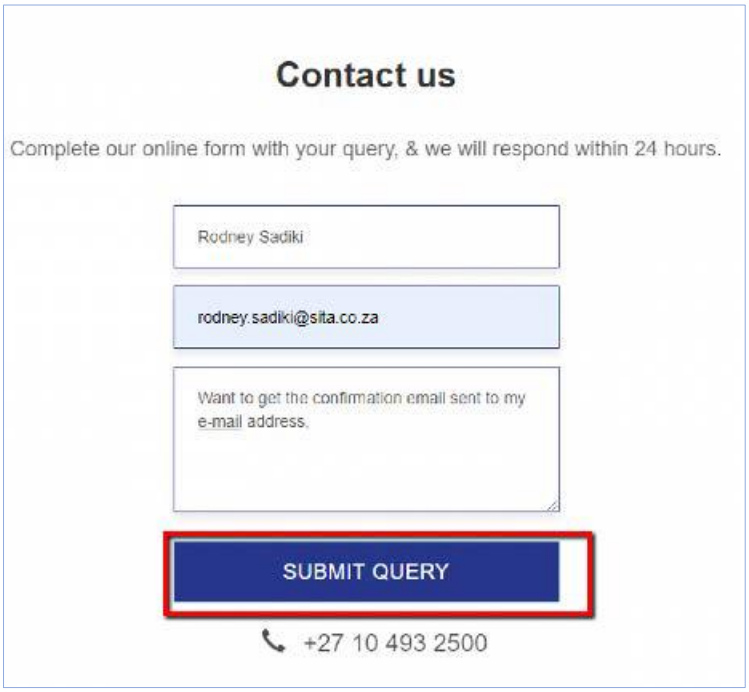
1. The user accesses the home page as illustrated

Figure 25 - Contact us button



2. Click on **Contact Us** and the **Contact Us** screen will be displayed as illustrated.

Figure 26 - Contact us screen



3. Capture your name on the **Your Name** field.
4. Capture your email in **Your Email** field.
5. Capture the reasons of what you want in a paragraph form.
6. Click on **SUBMIT QUERY** and your query will be submitted.

Notes

Section 5- Sign in

3. Sign in

Only users who are registered in the e-registry portal and be in an active state.

4. Process to Sign in

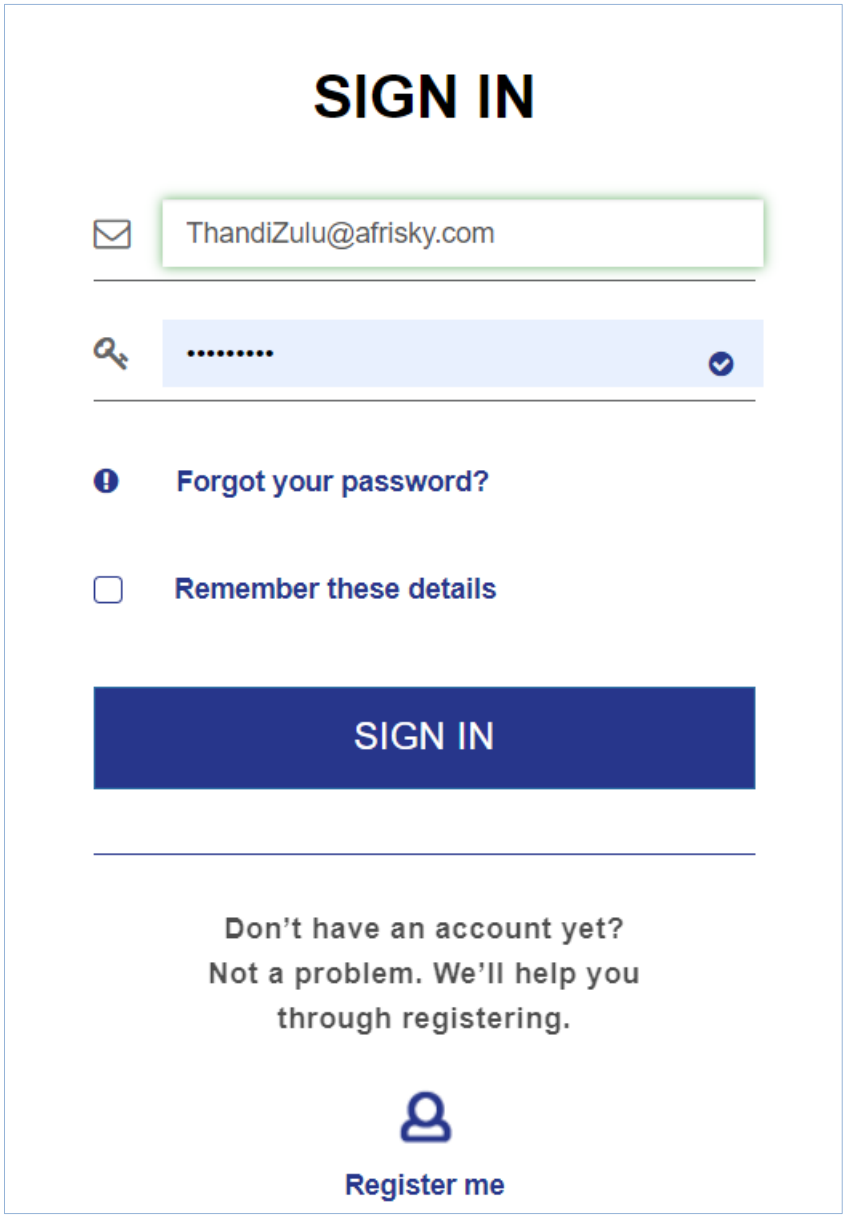
1. The User accesses **The judiciary** screen as illustrated below:

Figure 27 - Sign in button



2. Click on **Sign in** button.
3. The **Sign in** screen will be displayed as illustrated below.

Figure 28 - Sign in screen



4. Capture the registered **e-mail** address on the email address field
5. Capture the **Password** in the password field.
6. Click on **Sign in** button.
7. The system will validate the credentials and the user will be taken to the **e-Registry** portal landing page.
8. If the credentials are invalid, the system will display an activation error message.

Notes

Section 6- Forgot password

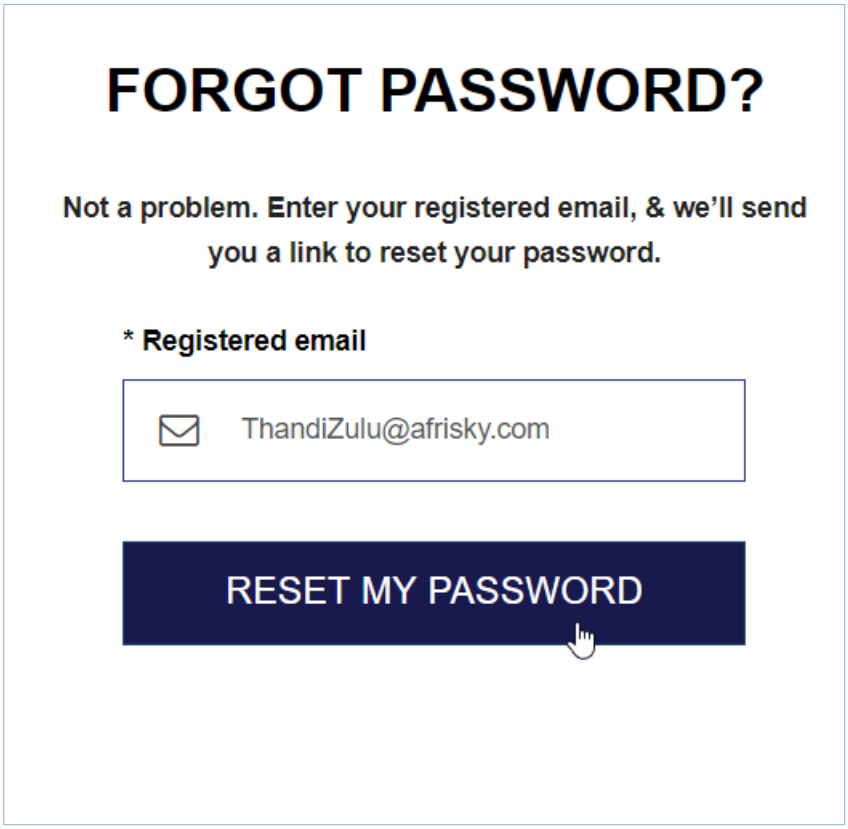
1. Password

This option will be used when the user has forgotten their password. The option will allow the user to reset the password.

2. Reset Password

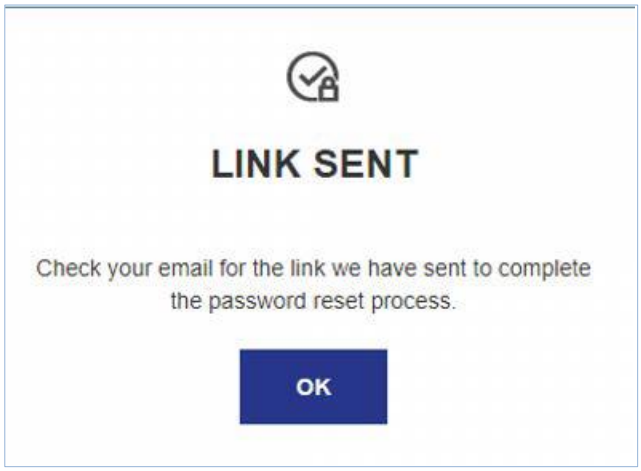
1. From the sign in screen, click on **Forgot password** hyperlink.

Figure 29 - Forgot password screen



2. Capture the registered email address in the **Registered email** field.
3. Click on the **Reset my password** button. A link to reset the password will be emailed to the provided email.

Figure 30 - Link sent screen



4. Click the **Ok button.** The user status will be updated to “Password reset pending”
5. The system will send an email to the user with a link to reset the password.
6. The user will reset the password by providing a new password that is different from previous passwords.
7. The password is updated.

NOTE

The system does not permit password reuse

Chapter 3-
Lodging and Joining a Case

This chapter consists of the sections listed below.

a) Section 1 – Start a Case

b) Section 2 – Accessing and Joining a Case

Section 1- Start a case

1. Start a case

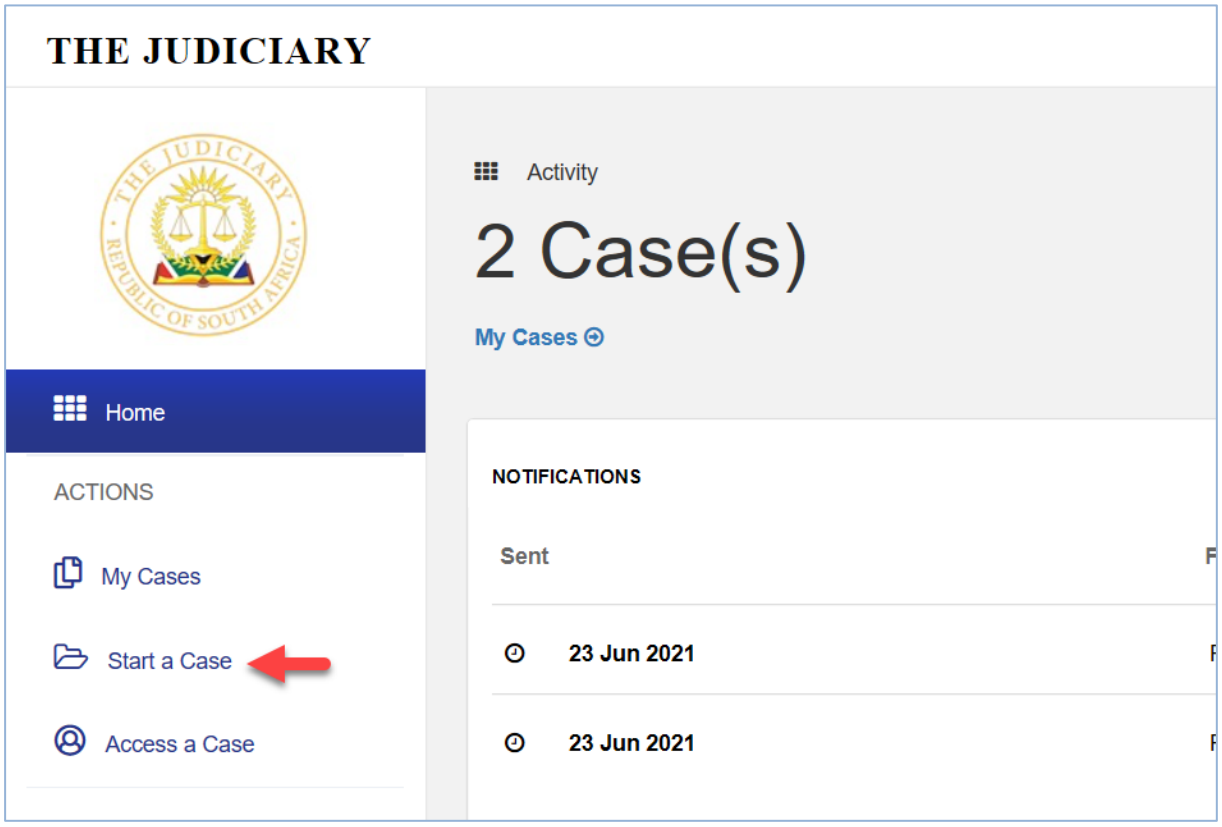
Civil proceedings will be initiated through **Start a case** on the Portal. This covers the initiation of any Action, Motion, Review or Appeal processes.

1. Initiate a Case

The following steps must be followed to initiate a case on the Portal:

1. When the user has successfully logged in to the Portal, the following screen will be displayed:

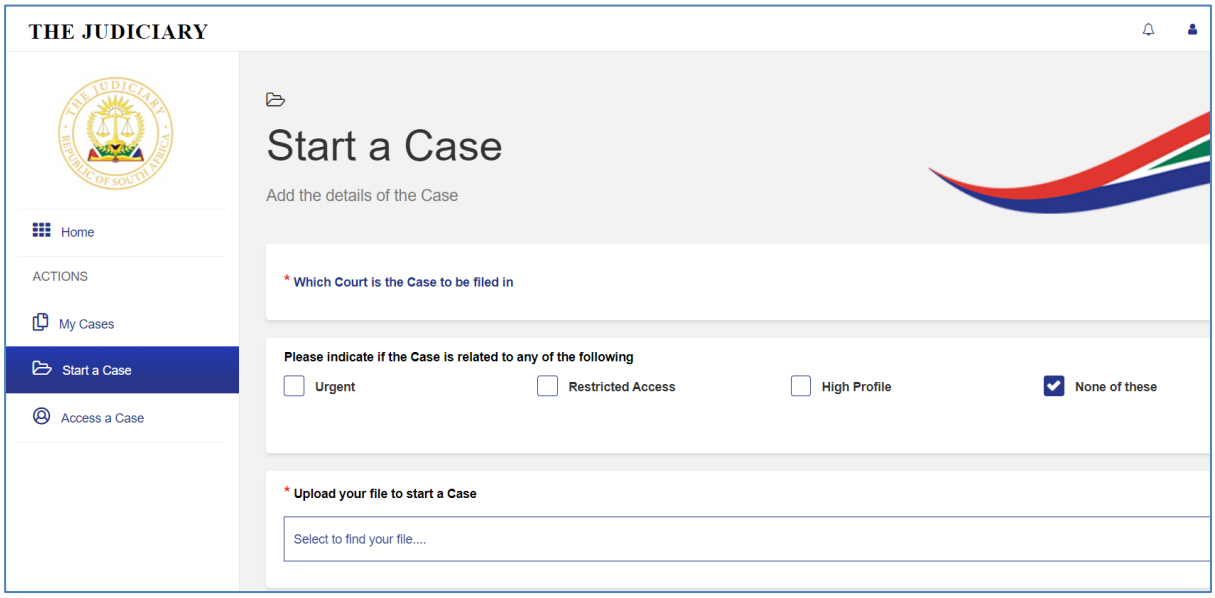
Figure 31 - The judiciary screen



2. Click on **Start a case** option.

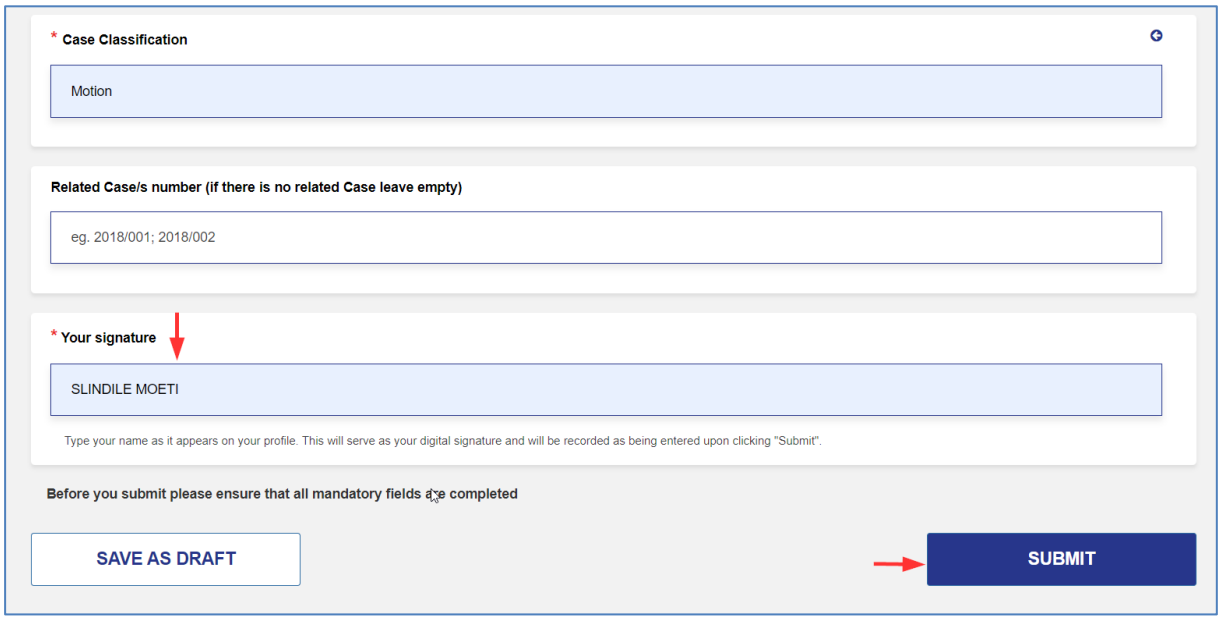
3. The following screen will be displayed:

Figure 32 - Start a case screen



4. Complete all fields on **Start a case** screen and attach a **pdf** of initiating document and any supporting documents.
5. Sign the submission by entering your portal name in the signature block and click **Submit**.

Figure 33 - Submit button



6. The system will provide notification that the case is lodged and it is pending the registrar's

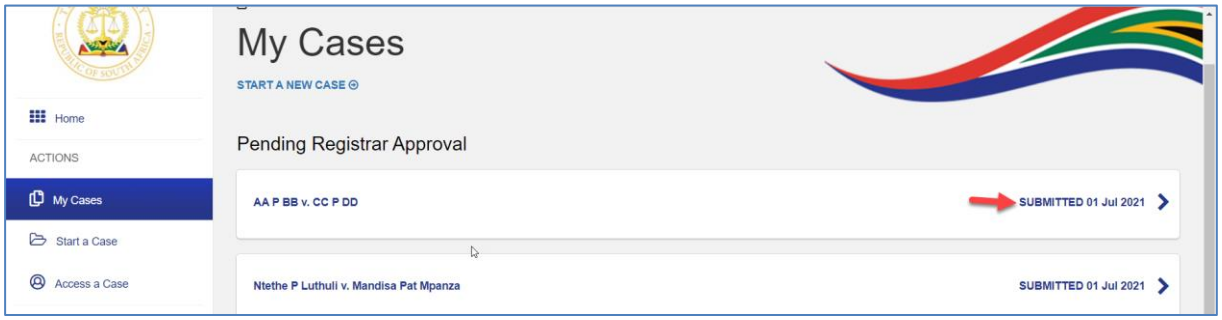
approval.

Figure 34 – Case initiated screen - notification



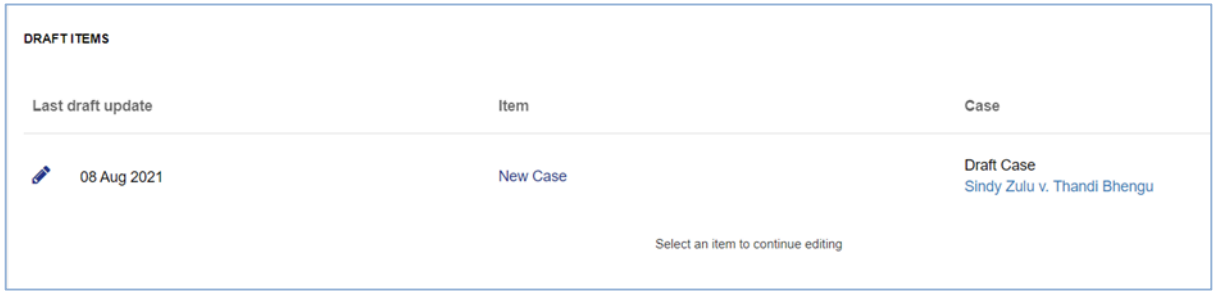
7. A case reference number and the other information for the case will be issued on the **Case initiated** screen. The case reference number is not the case number.
8. Click on the **Ok** button to close the screen.
9. Click on **My Cases** option on the My cases **screen**, the status of the case will be indicated as below:

Figure 35 - Pending cases screen



10. The submitted case will be waiting for Registrar/Registrar's Clerk's approval.
11. *Alternatively*, complete all fields on **Start a Case** screen and click on **Save as draf**t.
12. To locate a case saved in drafts, click on the **Home** tab and scroll down to draft items at the bottom of the screen.

Figure 36 - Draft Items





- Submitted case(s)will be shown under “Pending Registrar Approval”.
- Saved case(s)will be shown under Draft items and user can open and submit them.
- The user will be notified about the outcome of the case, whether it was approved, rejected or referred

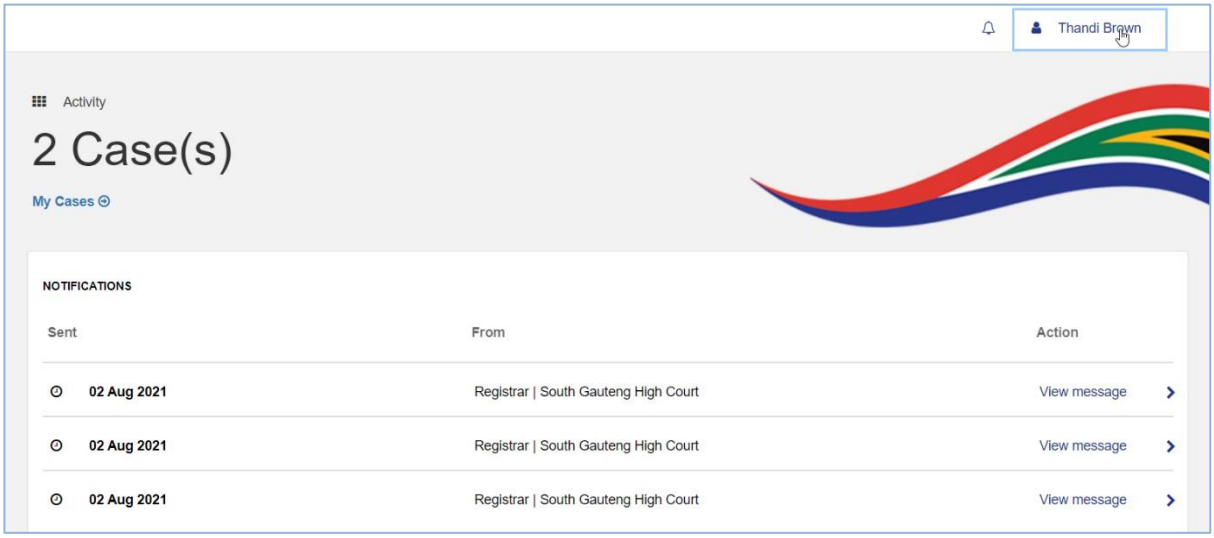
2. Notifications

Notifications on case progress will be sent by SMS and by email, depending on the option the user selected.

2.1 Change notification options

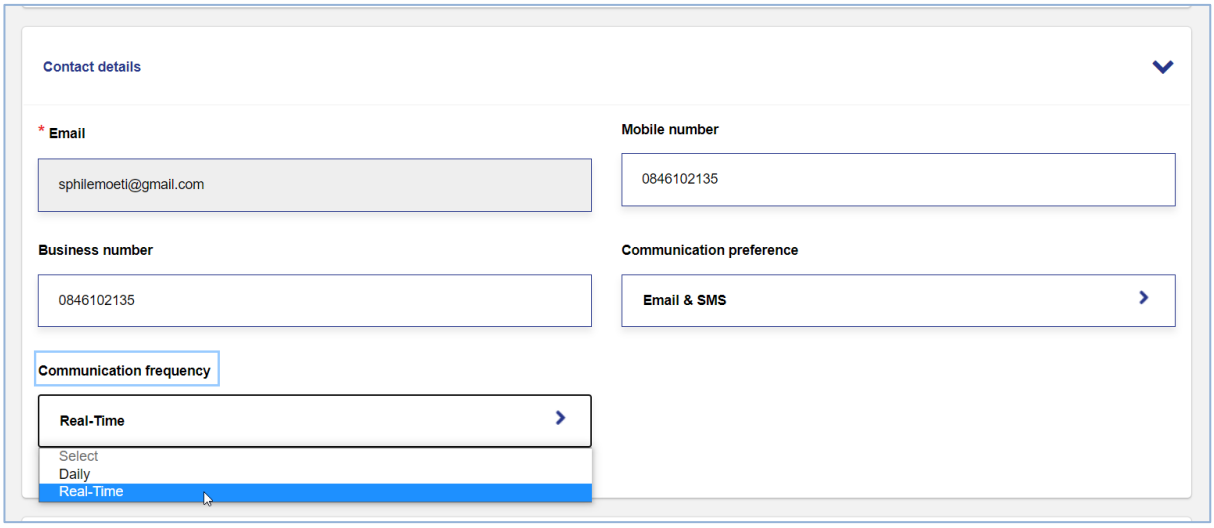
1. Sign in to the portal
2. Click on your name to access your profile as illustrated below:

Figure 37 - Name button to access your profile



3. Click on the **My profile** button.
4. Click on the **Contact details** button.
5. Select the preferred communication by clicking in the drop-down list.
6. Select the preferred frequency from the list.

Figure 38 - Communication frequency



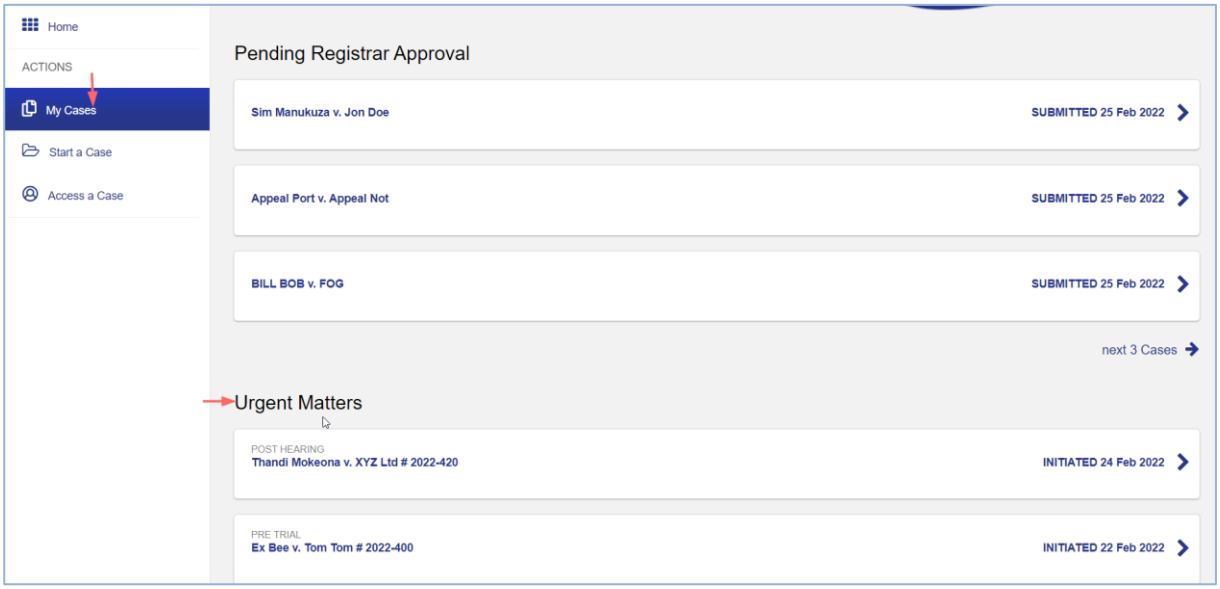
2.2 View notification

1. Notifications will be sent via SMS or/and via email. Notifications are also available on the portal.
2. Click on the **Home** tab on the portal
3. The notifications are displayed on the right side of the screen

2.3 Urgent cases

1. Cases that were marked as urgent during creating a case are placed under urgent matters
2. To view the urgent matters, click on **My cases** option on the screen.
3. The urgent cases are displayed under **Urgent matter** field as shown below on the screen:

Figure 39 - Urgent Matters Pending Registrar Approval



Notes

Section 2- Accessing and joining cases

1. Description

Accessing a case is when the user uses the **Access a Case** option and select accessing a case as a member of the public which will immediately give the user read-only access to the case for 24 hours. A member of the public can only access finalised cases, where an order has been issued.

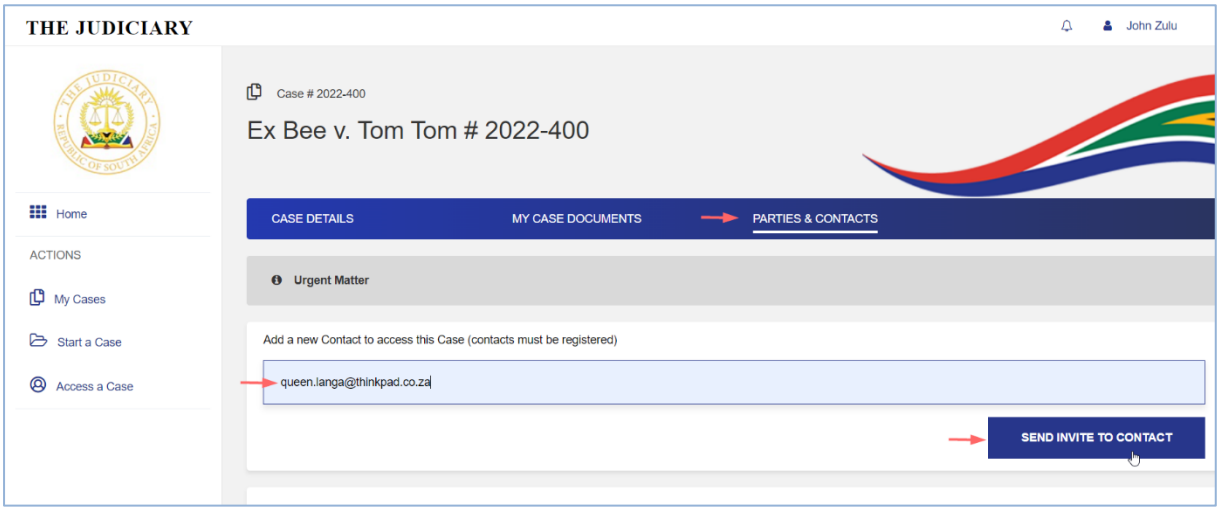
Joining a case is when a user uses the **Access a case** option and select that not allowing a member of the public to access the case. This will force the user to upload a document. Once the document is filed, the user will be part of the case.

2. Add a litigant to a case

The litigant that initiated the case can invite other relevant parties to the case. The litigant being invited should be a registered portal user.

1. Open the relevant case.
2. Click on the **Parties and contact** tab.
3. Add the email of the litigant being invited to the case as shown below

Figure 40 -Parties and contacts tab



4. Click on the Send invite to contact button.
5. The litigant will be added to the case.

3. Access a case

The following steps must be followed to access a case on the Portal:

1. Log in to the **Portal**.
2. Click on **Access a case** option on the screen.
3. The **Access a case** screen will be displayed.

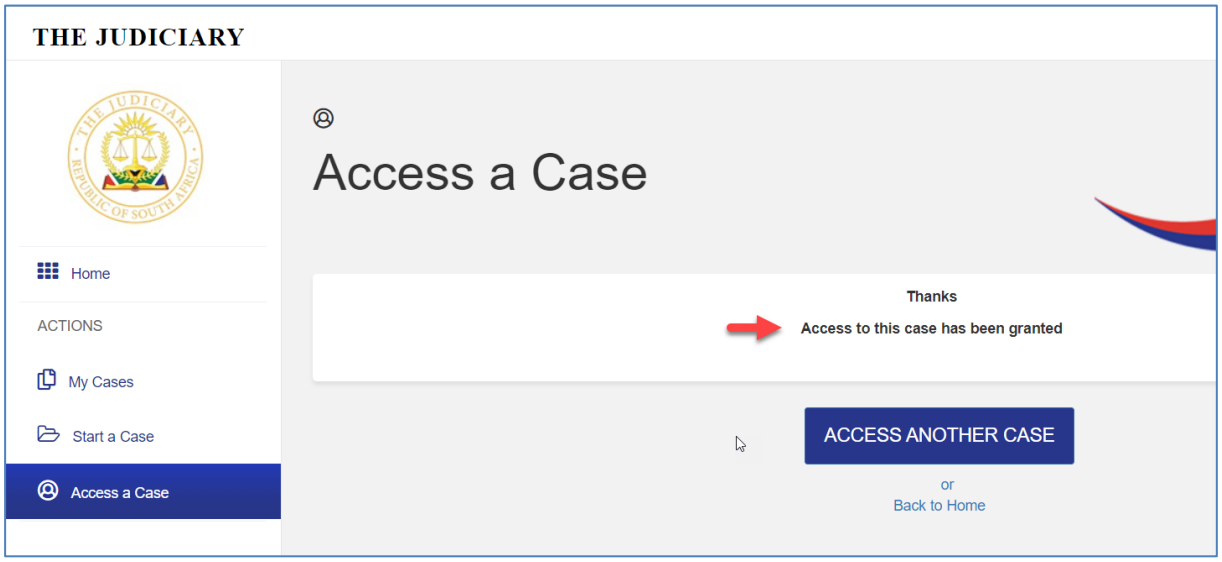
Figure 41 - Access a case screen



4. Captured the case number of the case to be accessed.
5. Select **Yes/No** to indicate if it is a member of the public accessing the case.

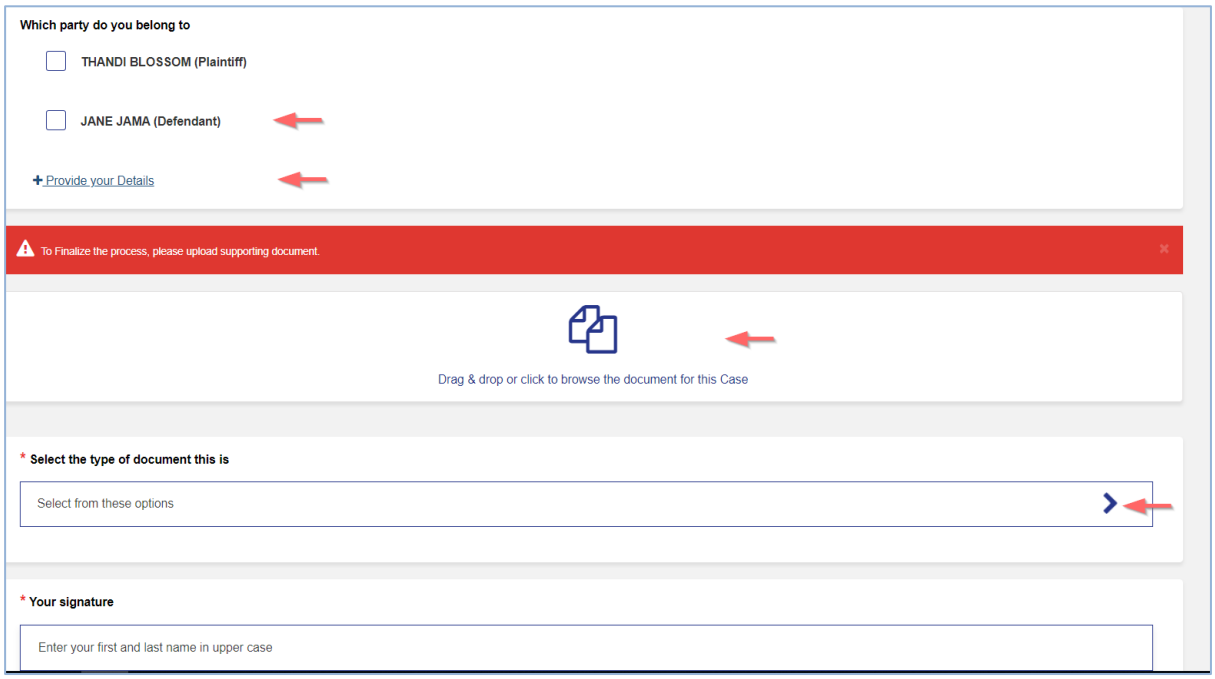
6. Click on the Request **access button**. If **Yes was selected,** the following screen will be displayed:

Figure 42 - Accessing a case screen



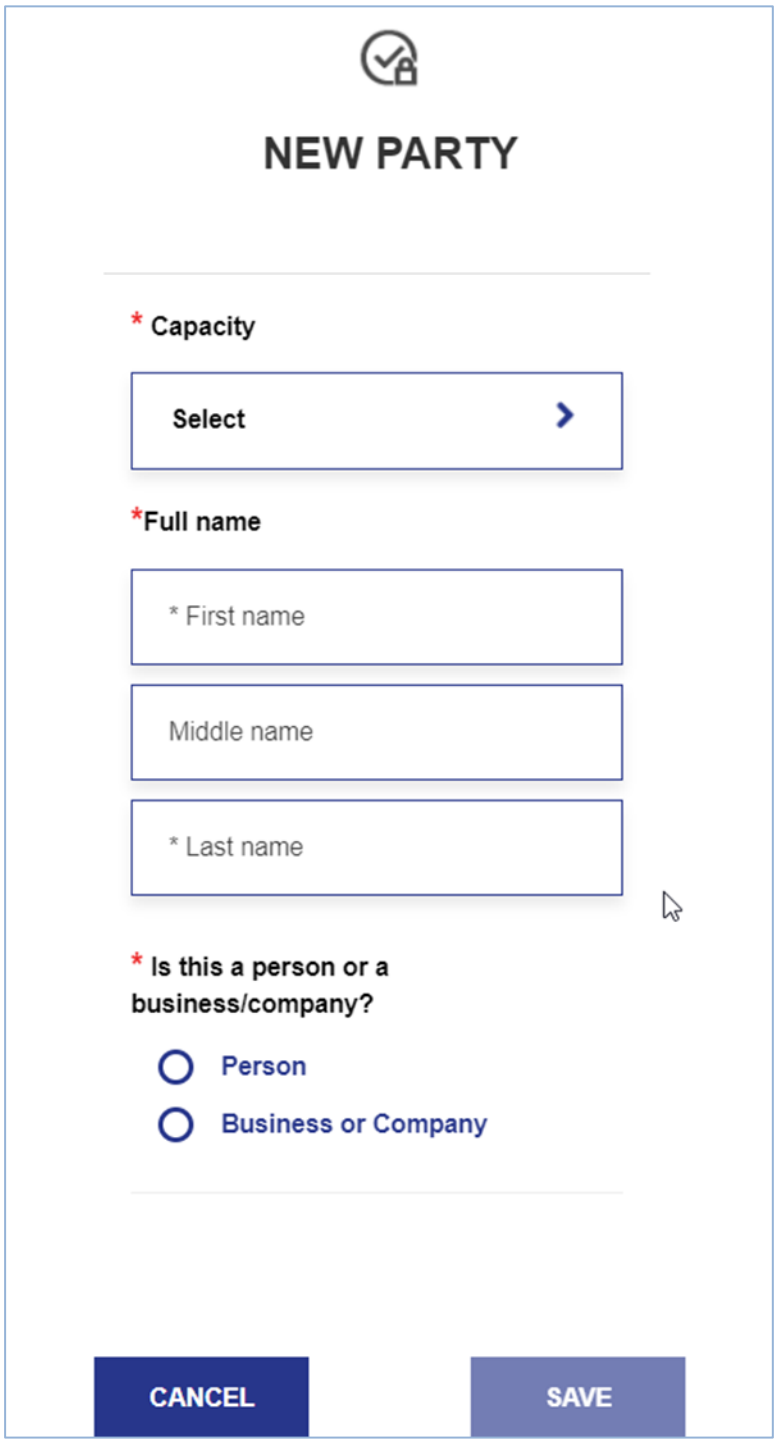
7. A message, stating that an access has been granted, the case will be displayed on the screen.
8. If No was selected, to indicate that it is a defendant legal representative, the following screen will be displayed:

Figure 43 – Access a case screen



9. Select the person are you representing
10. Click on **Provide your details** and the following screen will be displayed

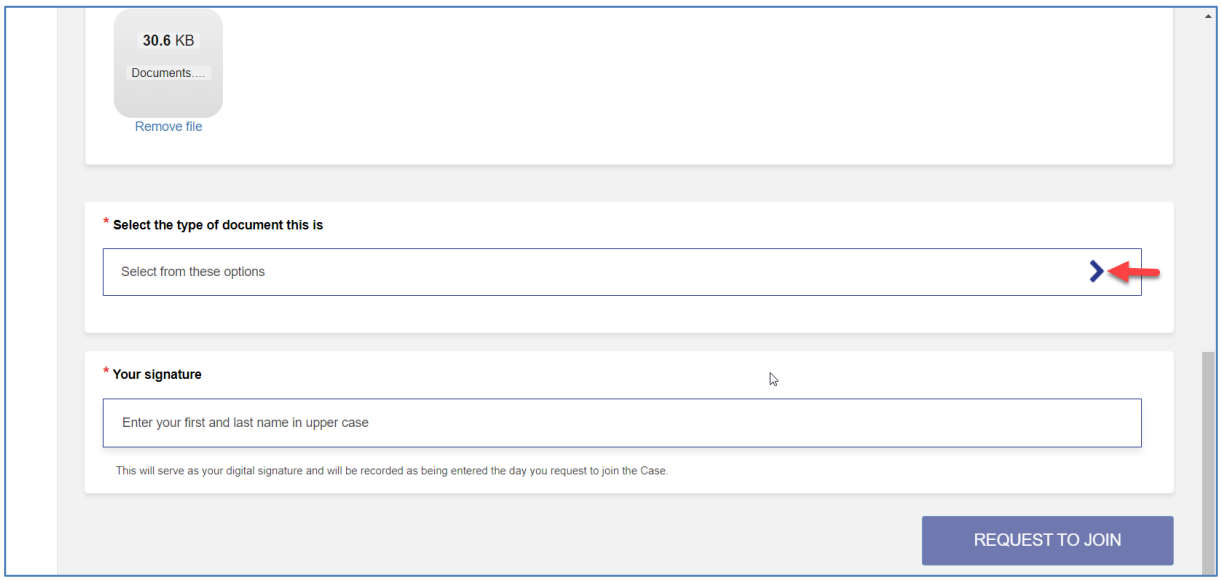
Figure 44 - New Party screen



11. Click on the Capacity drop down list to select the capacity.
12. Capture the names and the surname at the provided fields.
13. Click on the radio button to select whether the user is a person or a company.
14. Click on the **Save** button to save changes.

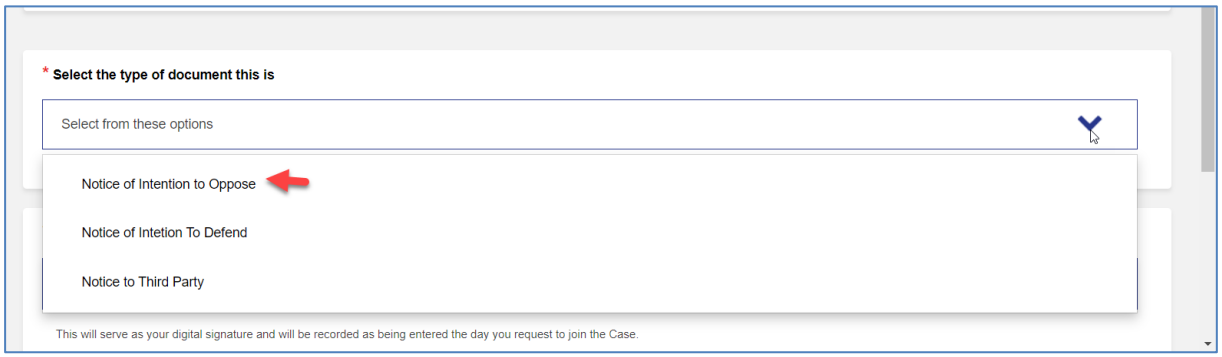
15. Click on the **Cancel** button to cancel the information captured on the screen.
16. Upload the supporting document.

Figure 45 - Requesting to join screen



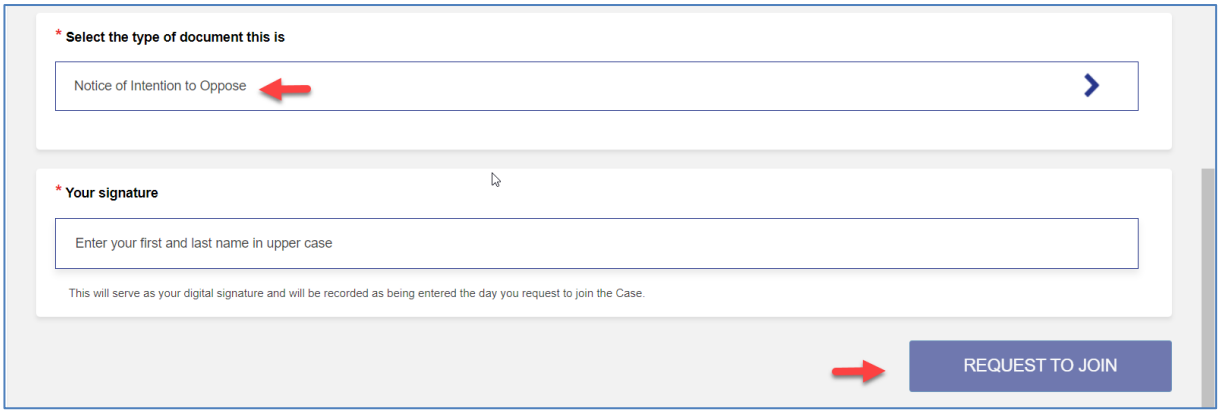
17. Click on the arrow to select the type of document uploaded. The following screen will be displayed:

Figure 46 - Document type screen



18. Select the document type and add your signature.
19. Click **Request to join** button as shown in Figure 47.

Figure 47 - Request to join button





The request will be forwarded to the registrar for approval and once access to the case is granted the user will receive notification.

Notes

Notes

Chapter 4- Case lifecycle

This chapter consists of the sections listed below.

a) Section 1 – File Stage
b) Section 2 – In Pleadings Stage
c) Section 3 – Pre-Trial Stage
d) Section 4 – Creating Events and Bundles (Pre-Trial)
e) Section 5 – Trial
f) Section 6 – Motion Case
g) Section 7 – Appeal Case
h) Section 8 – Taxation
i) Section 9 – Closed Cases

Section 1- Filing a Document

1. Description

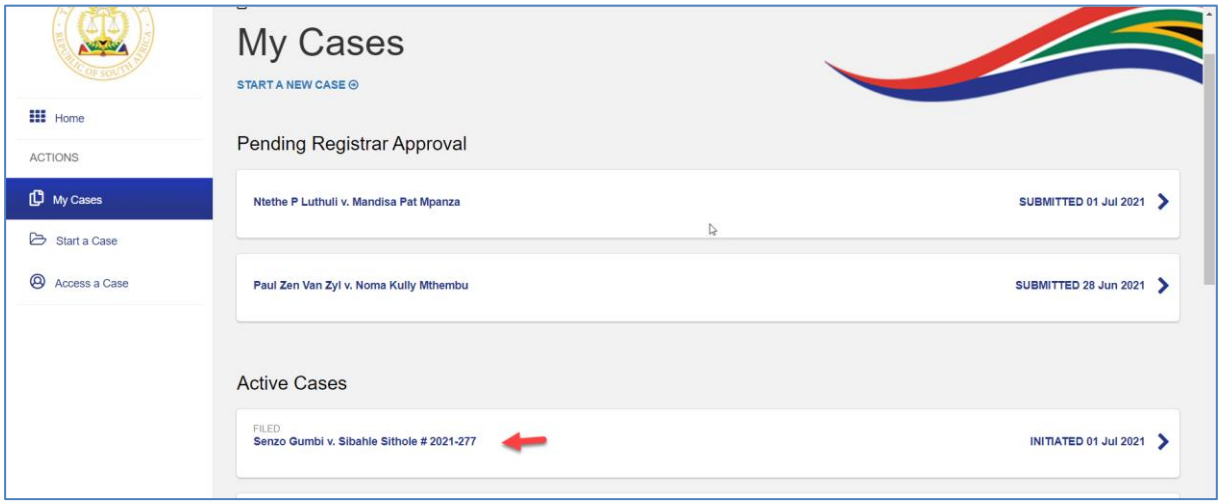
This feature provides a portal user with the ability to submit documents to the court as part of the court case process. Once the case has been issued by the registrar the portal user will be notified of the approval and can log in to the Portal to file the necessary case documents.

2. Submit a document

The following steps must be followed to file a document on the Portal.

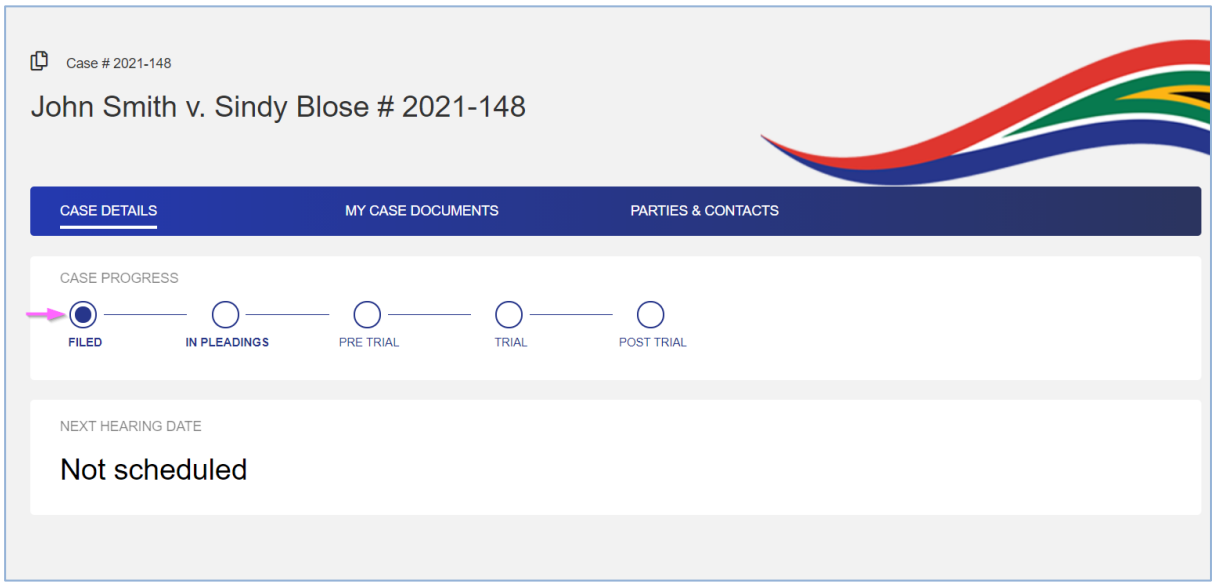
1. Upon logging into the Portal, click on **My cases**. The following screen will be displayed:

Figure 48 - My Cases screen



2. Click on the case required case on the **Active cases**, option dropdown list.
3. The following screen will be displayed:

Figure 49 -Filed case screen



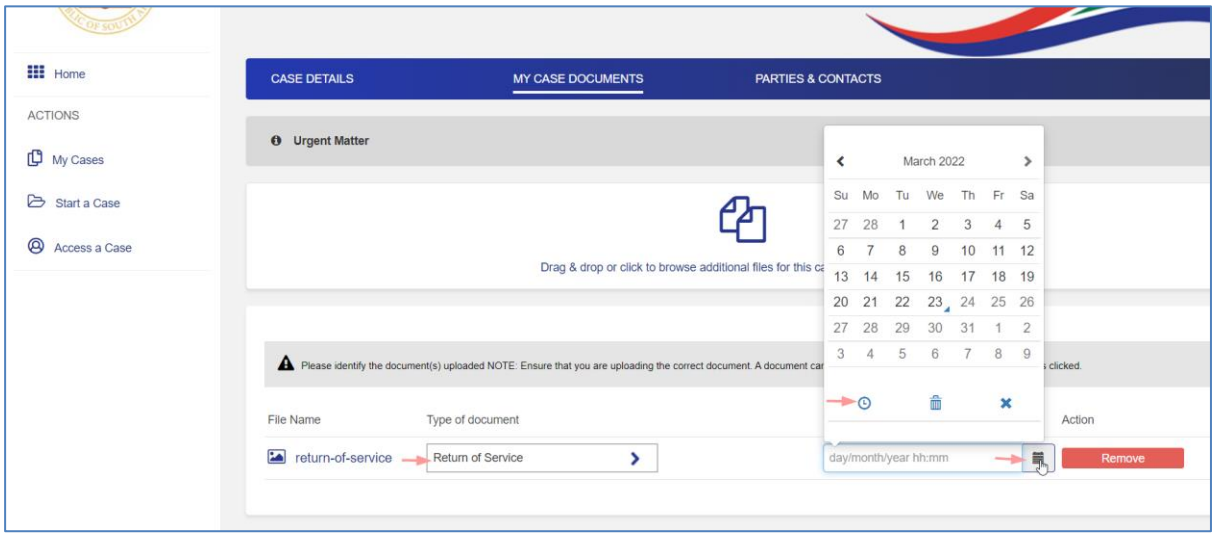
4. The Filed radio box will be selected to indicated that the case has been filed.
5. Click on the **My case documents** menu to upload the case documents.
6. The following screen will be displayed:

Figure 50 - Uploading documents screen



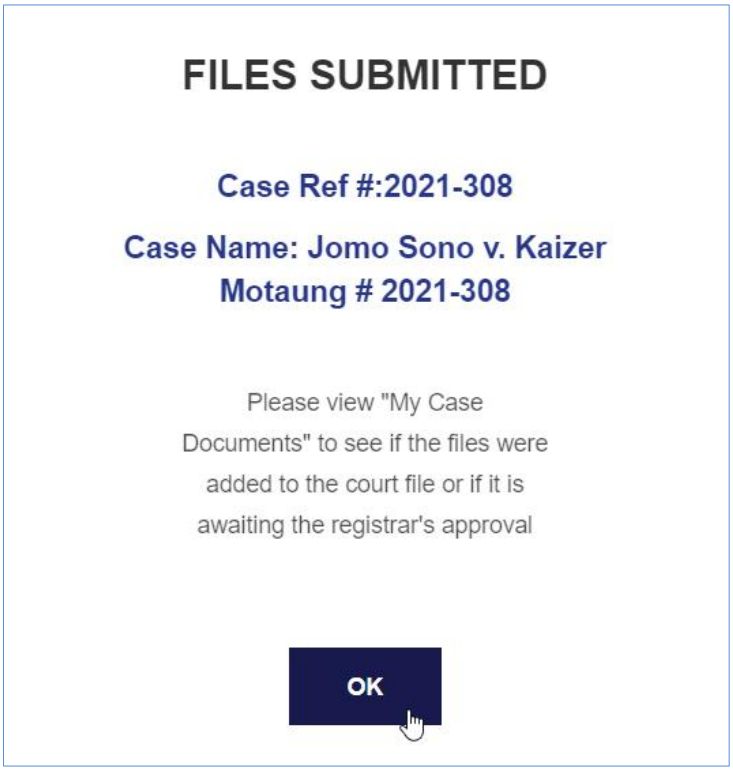
7. Click on the **Upload** icon to upload the case documents. The following screen will be displayed:

Figure 51 - Document type screen



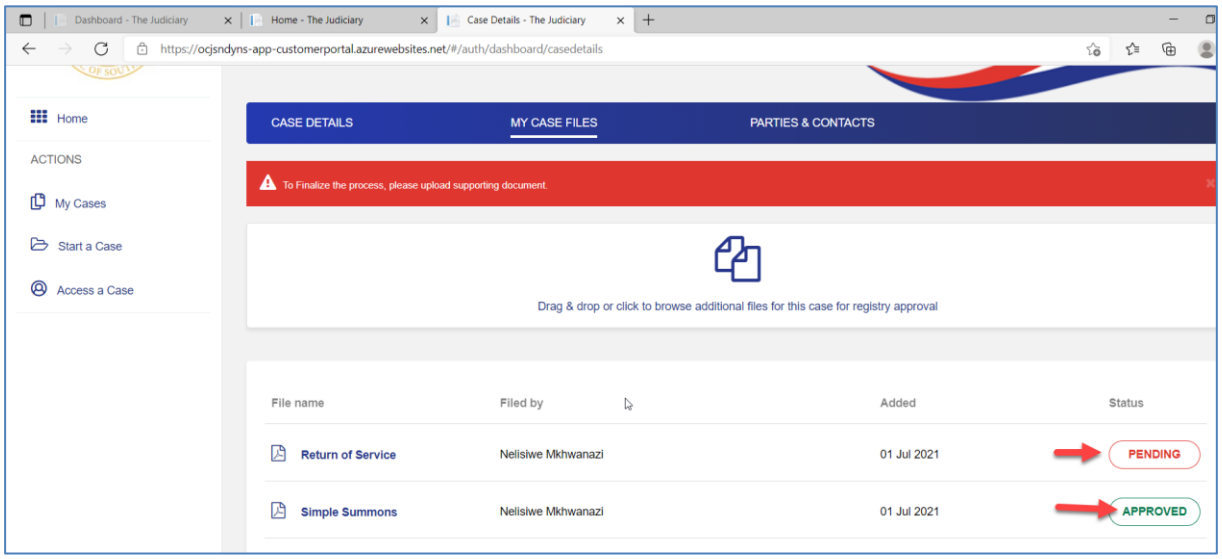
8. Click on the arrow to select the relevant document and select the date and time of service.
9. Sign using your registered name and surname in capital letters. If you click on **Save as draft**, the document will be stored in temporary storage. If you click on **Submit**, the document will be submitted and a notification will be received as indicated on the screen below:

Figure 52 - Notification screen



10. Click **Ok**. The following screen will be displayed:

Figure 53 - Approved/pending documents screen



The status of the **Approved/Pending** documents will be indicated.

(a) Approved documents are documents that have been approved by the Registrar or that do not need approval.

(b) Pending documents are documents that are awaiting Registrar's approval.

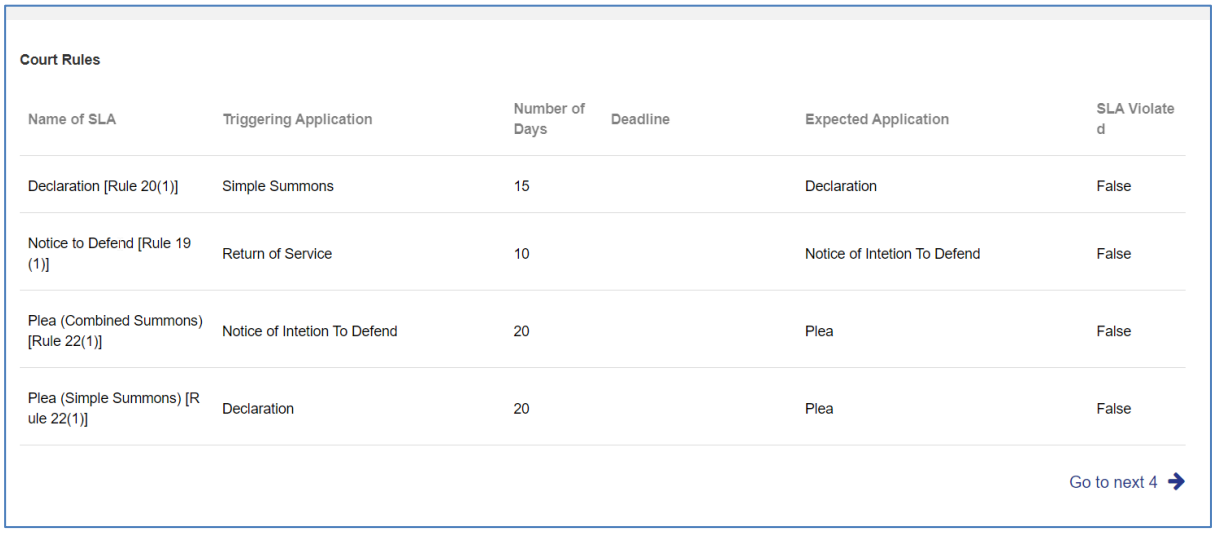
3. Court Rules



The principal behind the court rule Service Level Agreement (SLA) is that there is a specified period (court days – working hours) whereby council is allowed to submit a document (an application) to the court file. The SLA intends to calculate the deadline by which a specific application type is to be submitted once a specific application has been filed.

The intention of the SLA is to provide a visual indication to litigants and registrars alike regarding potential violations of the SLAs as well as SLAs that have been violated as well. Furthermore, a notification is to be sent to warn of potential violations and violations that may have occurred on a case. The court rules information is displayed on an active case as shown in **Figure 54.**

Figure 54 - Court rules



Court Rules

Name of SLA	Triggering Application	Number of Days	Deadline	Expected Application	SLA Violated
Declaration [Rule 20(1)]	Simple Summons	15		Declaration	False
Notice to Defend [Rule 19 (1)]	Return of Service	10		Notice of Intetion To Defend	False
Plea (Combined Summons) [Rule 22(1)]	Notice of Intetion To Defend	20		Plea	False
Plea (Simple Summons) [Rule 22(1)]	Declaration	20		Plea	False

Go to next 4

Notes

Section 2- Pleadings

1. Description

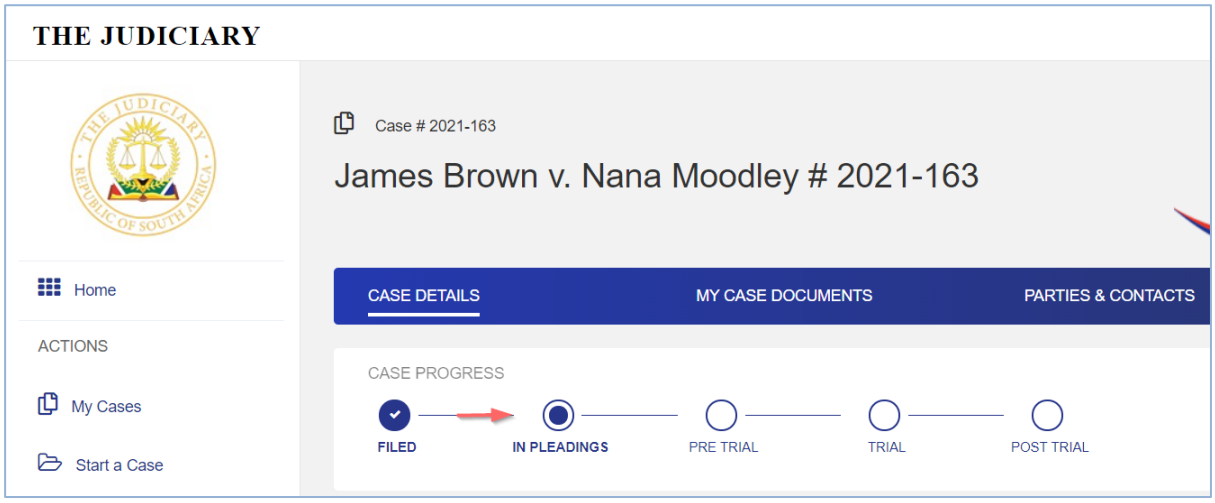
This is a stage where the different representatives will be filing documents or pleading in the case.

1. Process for pleadings

The following steps must be followed when the case is in pleadings.

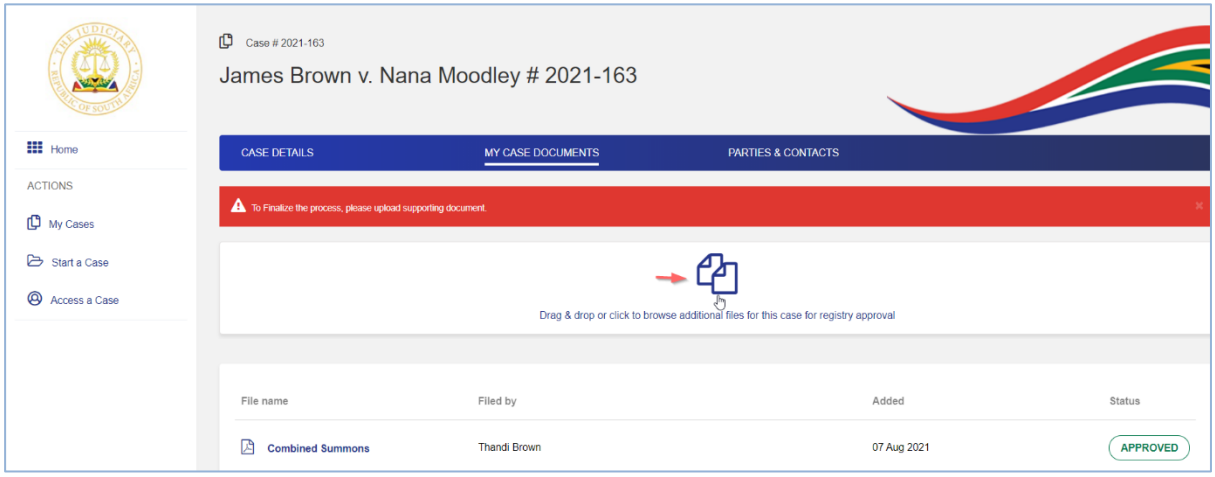
1. Upon logging into Portal, click on the case under **Active cases**. The screen will be opened showing that the case process has moved to the **In pleadings** status. The **In pleading**s radio box will be selected as indicated on the screen below:

Figure 55 - In pleadings case screen



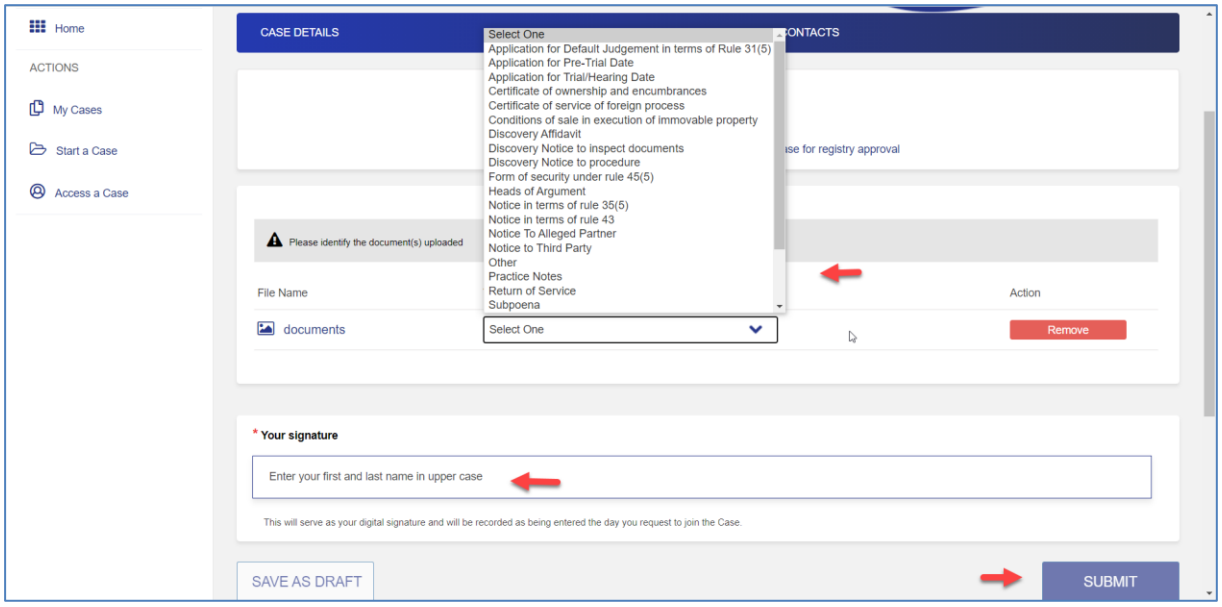
2. The case is now in pleadings. Click on **My case documents menu on the screen**. The following screen will be displayed:

Figure 56 - Upload document screen



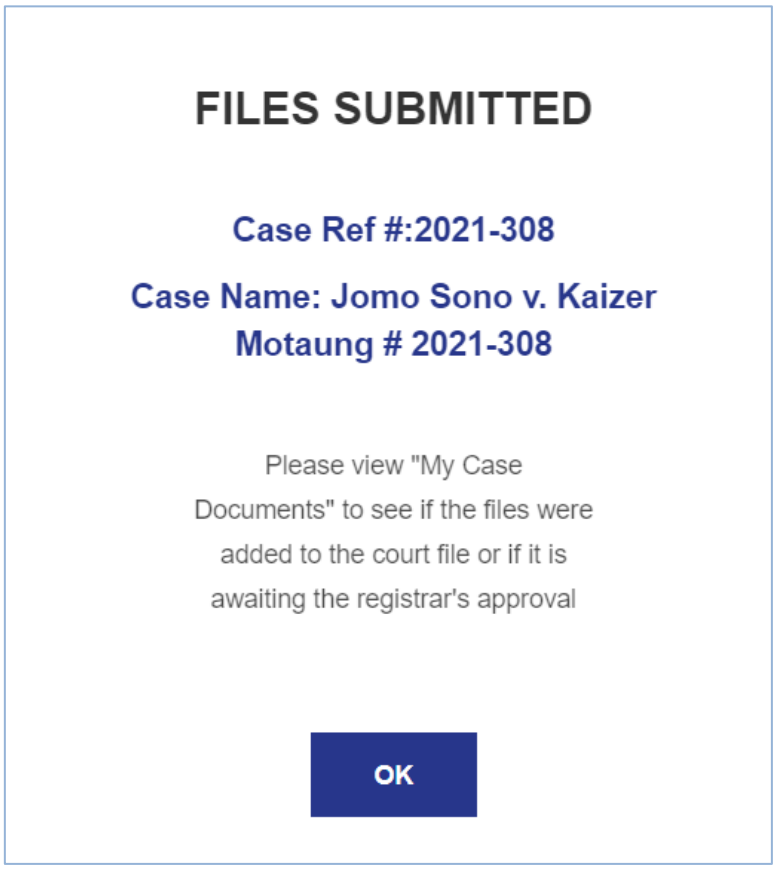
3. Upload the document. The following screen will be displayed:

Figure 57 - Document type screen



4. Select the type of document from the Documents dropdown list, e.g. heads of arguments.
5. Attach your signature and click on the **Submit** button.
6. The following notification will be displayed:

Figure 58 - Notification screen



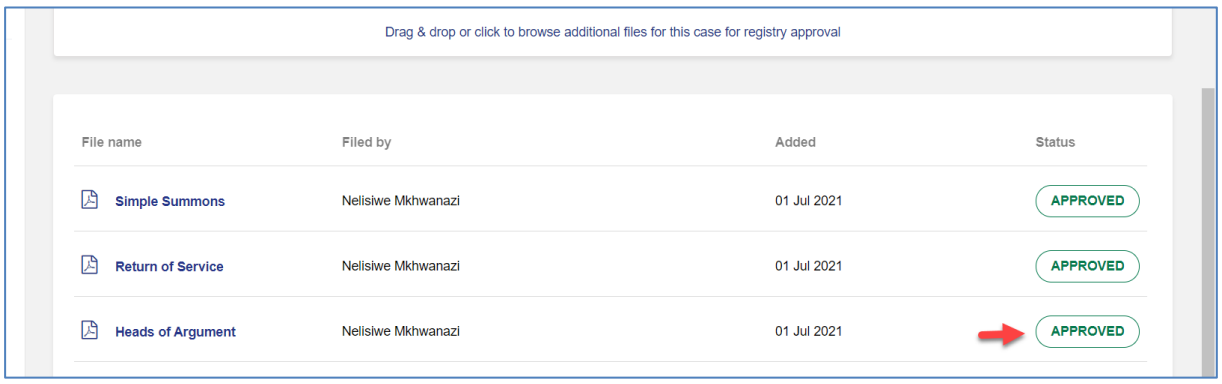
7. Click on the Ok to close the notification screen.

NOTE

If the document needs to be approved by the Registrar, it will be indicated as pending.

8. If it is marked as auto approved, it will be automatically approved as indicated on the screen below:

Figure 59 -Approved document screen



Notes

Section 3- Applying for hearing

1. Description

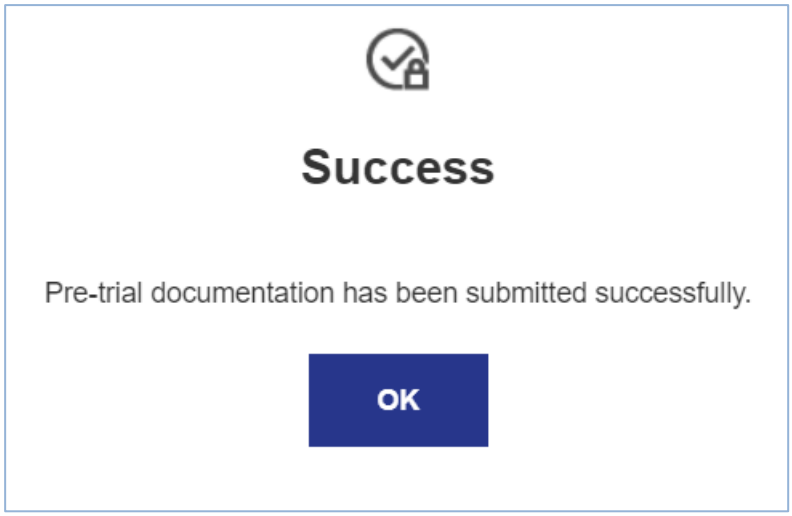
While the case is still in Pleadings, the two parties might not come to an agreement and they determine that they want to go to court and apply for hearing date.

2. Process to Apply for Hearing

The following steps must be followed when the case is in pleadings.

1. Upon logging into the Portal, click on your case under **Active cases** option.
2. The case will be opened.
3. Click on **My case documents** option on the **Judiciary** screen.
4. The screen where documents must be uploaded will be displayed.
5. Click on **Upload** icon to upload the document.
6. Select the document type e.g. application for trial/hearing date.
7. Sign the document.
8. Click on the **Submit** button.
9. A notification will be displayed to indicate that the document has been submitted and is now part of the case.

Figure 60 - Notification for pre-trial documentation



10. Click on the Ok button to close the screen.
11. The document will be indicated as pending if it needs to be reviewed by the registrar or approved if it is auto-approved.

Notes

Section 4-
Creating events and bundles (Pre-Trial)

1. Description

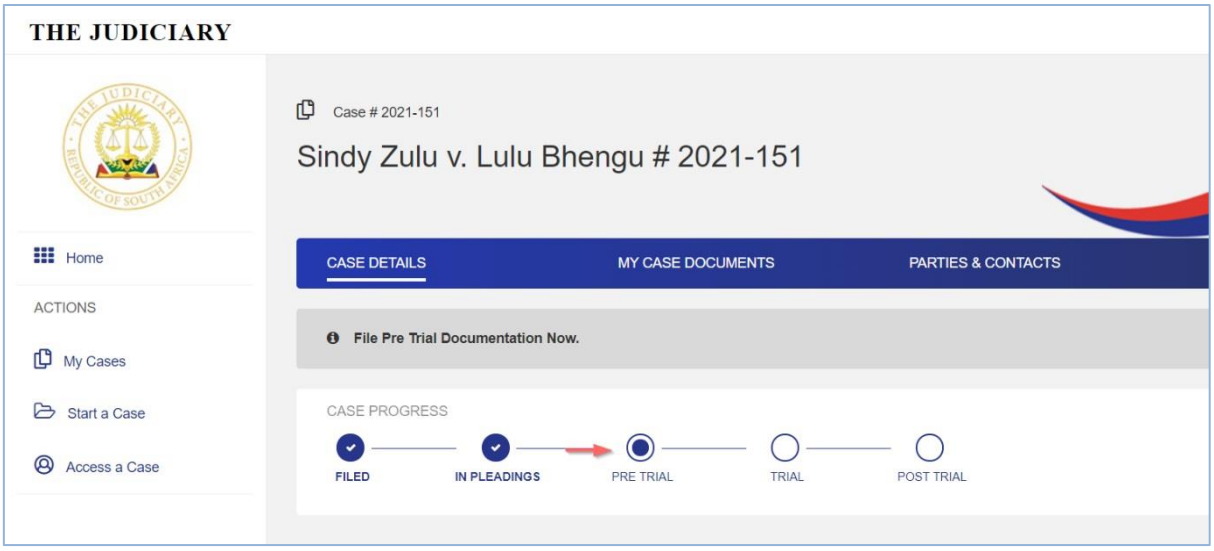
Events are created by the Registrar and once created, the Portal user can create the bundle for the event. The user can add documents to the bundle relating to the event.

2. Create an event and bundles

Follow the steps to indicate readiness for a trial or a hearing:

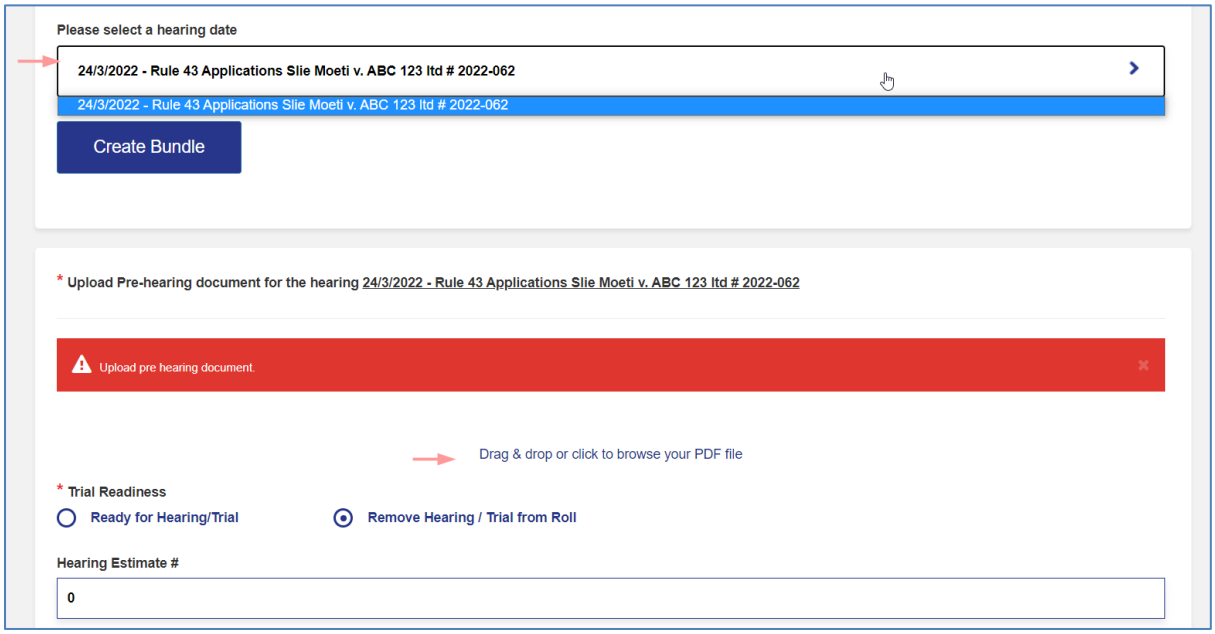
1. Go to the **Portal** to file your documents.
2. Click on **My cases** then upload the case documents.
3. The screen will be displayed with the Pre-trial radio box selected to indicate that the case has moved to the pre-trail phase.

Figure 61 - Pre-trial screen



4. The created event will be displayed under case details.
5. Select the event on **Please select a hearing date** drop down option

Figure 62 - Hearing date selection



6. Click on **Upload** icon to upload the relevant documents.
7. Select the document type e.g. practice notes
8. Sign the document.
9. Indicate the estimated duration of the trial/hearing on **Hearing estimate #** field.
10. Indicate **Hearing Estimate Units** as illustrated.

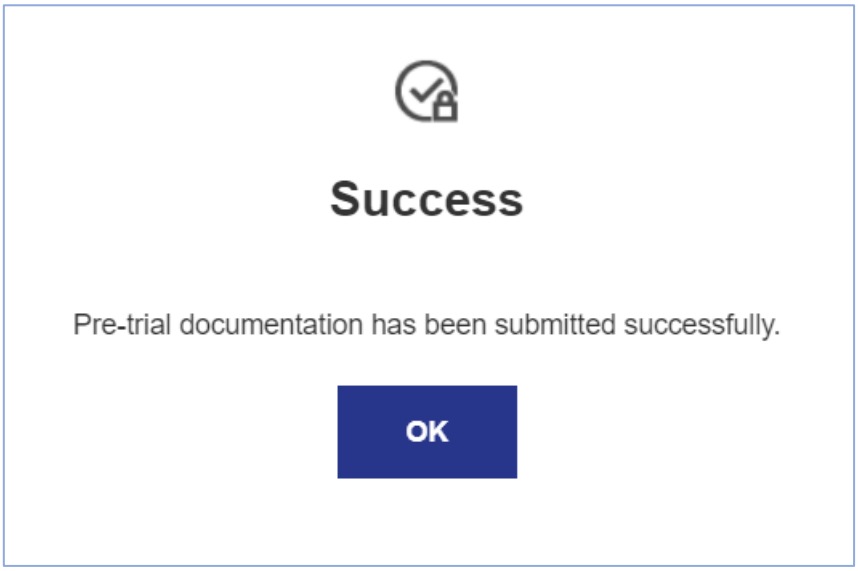
Figure 63 - Hearing estimate screen



11. Click on the **Submit** button.

12. A notification will be displayed to indicate that the document has been submitted. Once it is submitted, it will become part of the case.
13. The notification will be sent as indicated below:
14. click on the Ok button to close the screen.

Figure 64 - Notification screen

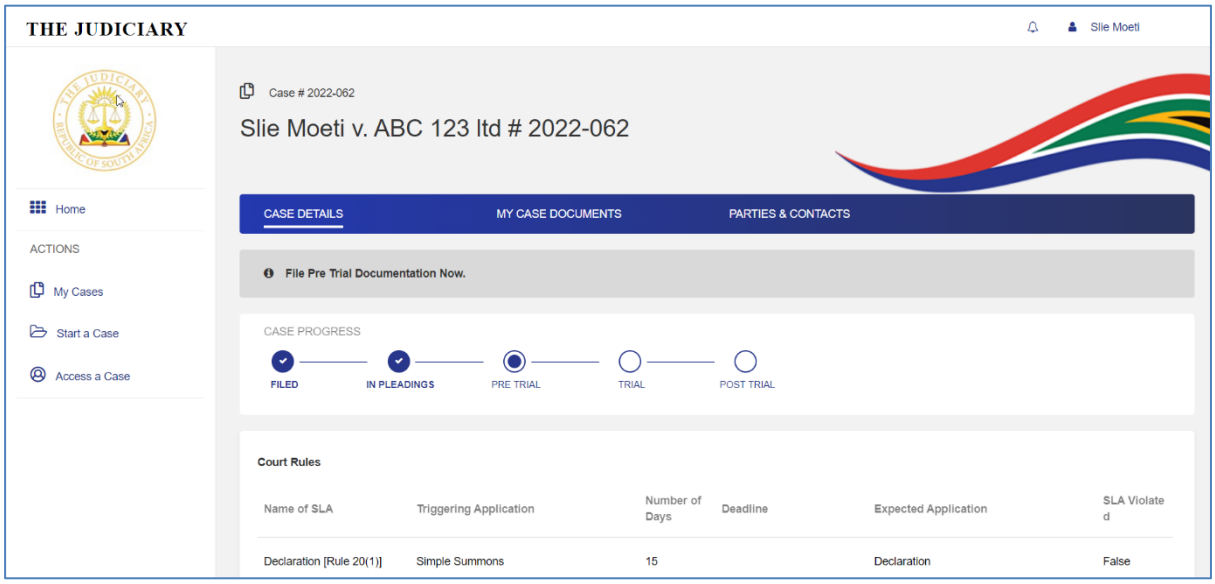


3. Bundles

A court bundle is a folder(s) which contains copies of all the documents which are considered relevant to a court case. Once an event is available on the system, the user is able to create a bundle.

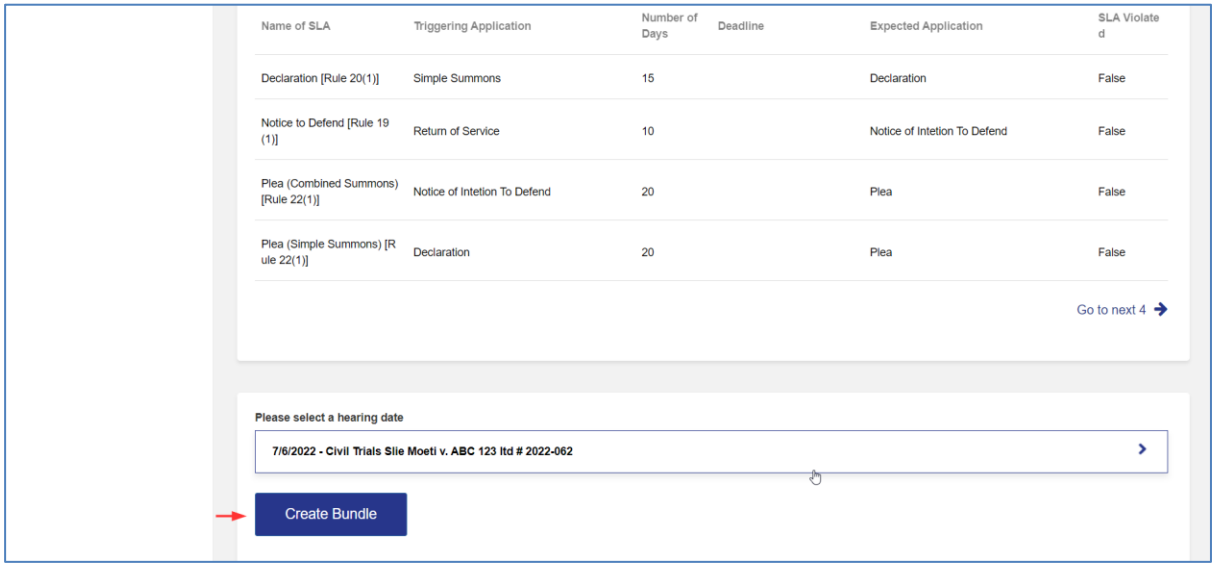
1. Upon logging into Portal, click on the case under **Active cases**
2. The case opens as displayed below

Figure 65 - Case details



3. Scroll down and click on the **Create bundle** on the case details screen as displayed in **Figure 66.**

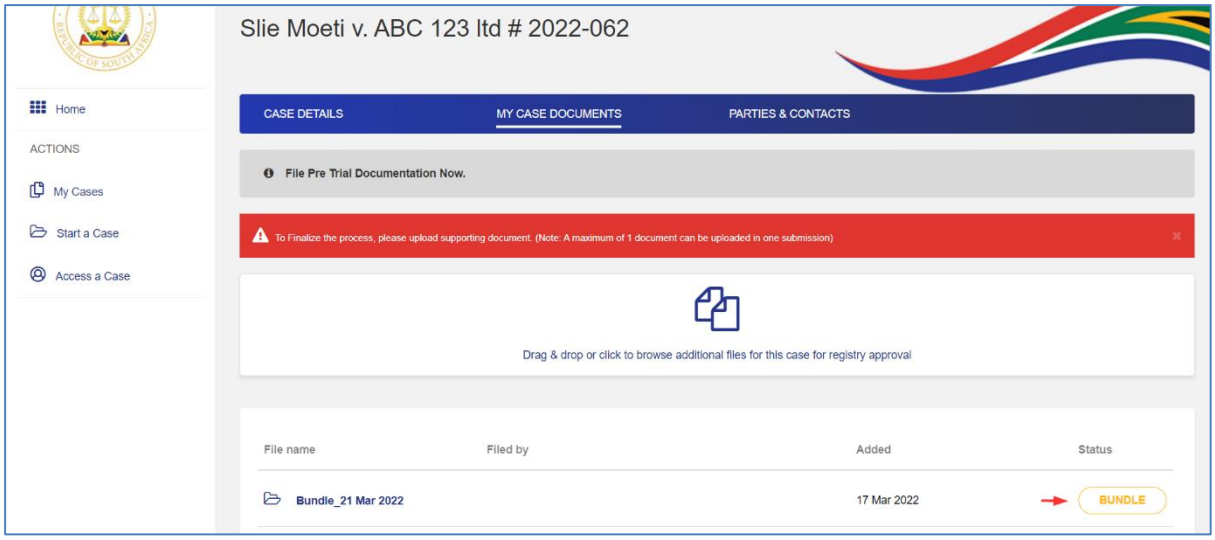
Figure 66 - Create bundle button



4. The bundle will be created in the Portal and Caselines.

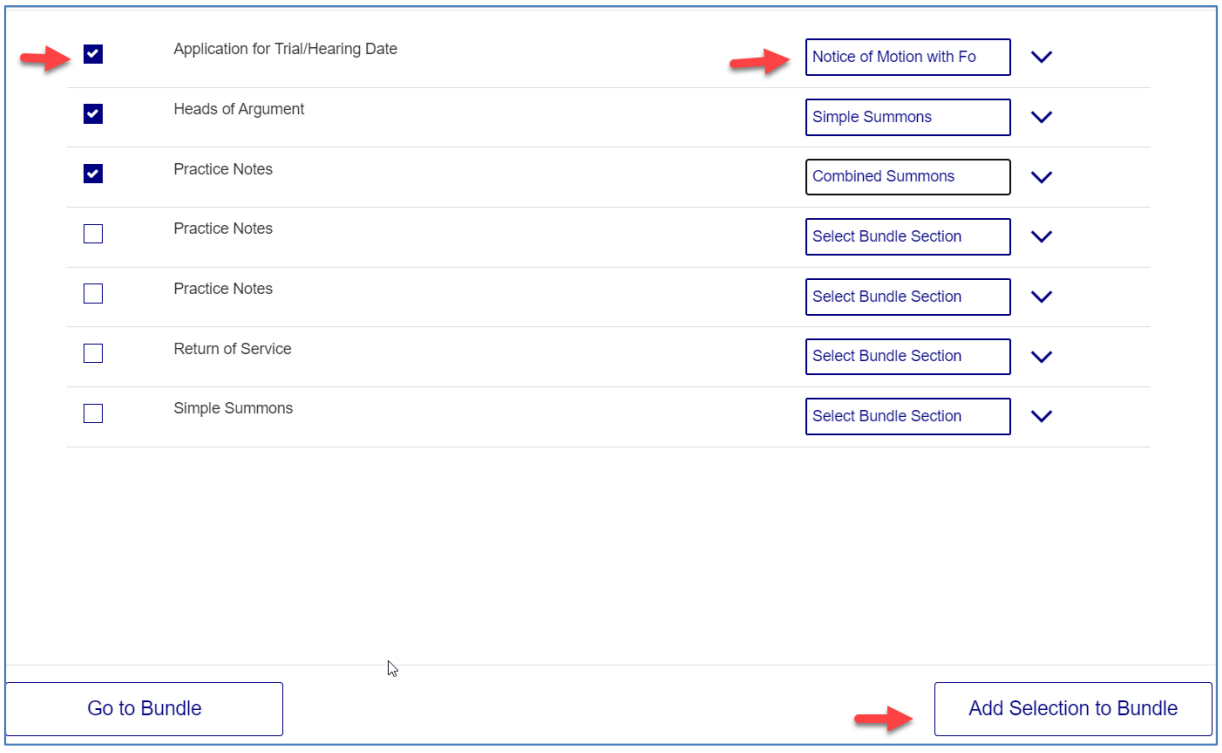
5. Go to **My case documents** and click on the **Bundle** button.

Figure 67 - Bundle button



6. The following screen will be displayed:

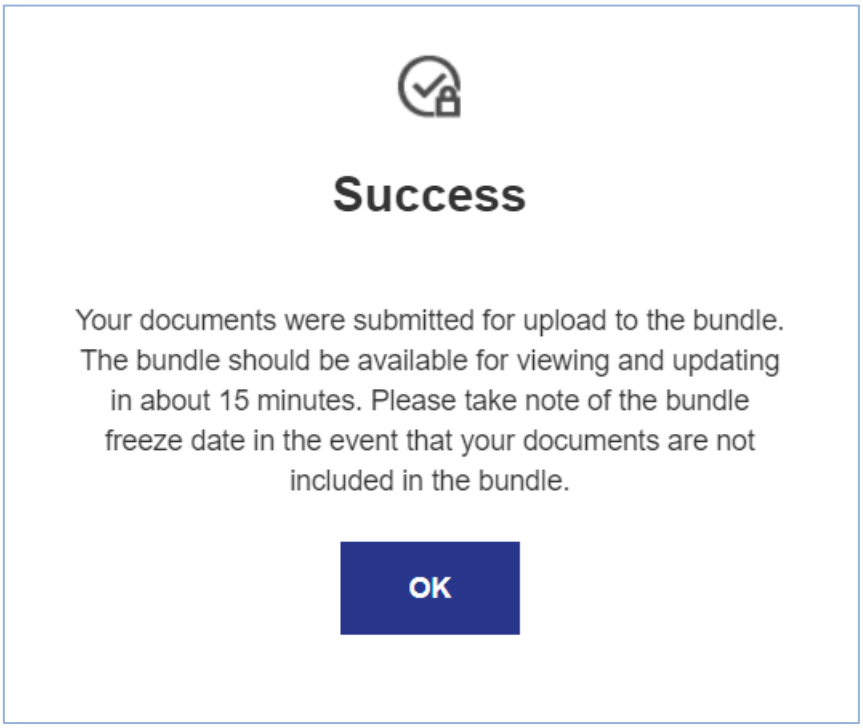
Figure 68 - Bundle screen



7. Select the documents that must be added to the case and indicate the name of the document.
8. Click on the **Add selection to bundle** button.

9. The notification screen will pop up on the screen to indicate that the bundle will be available for viewing. If the document is big it will take some time to load.
10. Click on the **Ok** button to close the screen.

Figure 69 - Notification screen

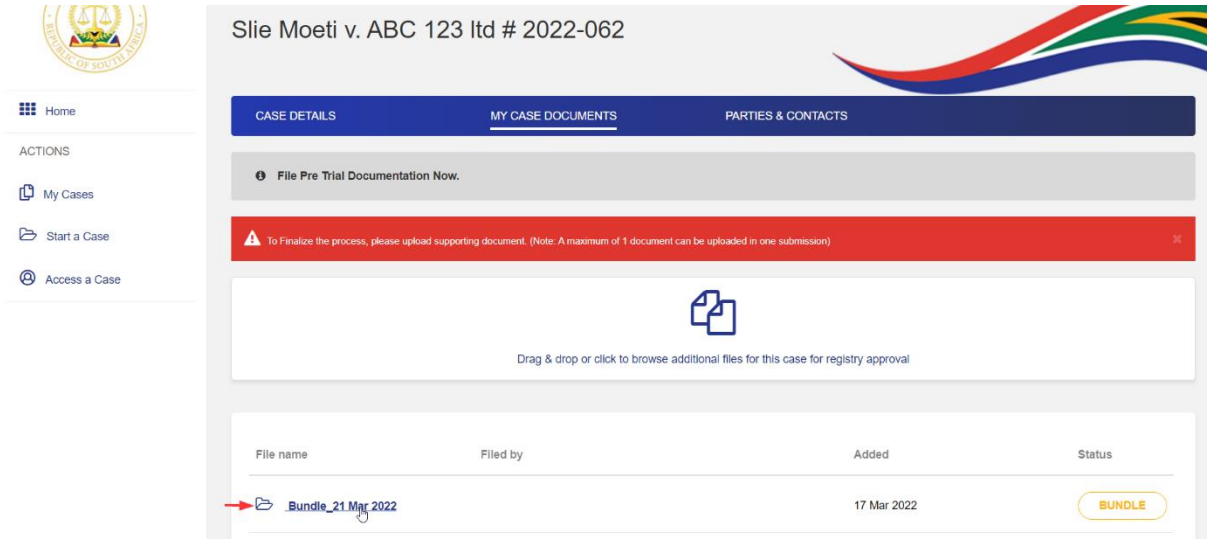


NOTE

If the bundle freeze date has been reached, no documents can be added to the bundle.

11. Click on the **Bundle name** link as displayed below:

Figure 70 - Bundle name link



12. . The following screen will be displayed where all the documents added to the bundle will be displayed:

Figure 71 - Document screen



Notes

Section 5- Trial

1. Description

When the case is on the trial stage, it means the case is enrolled. All the endorsements will be captured as outcomes. The judge will give the outcome/ judgement regarding the case conducted. That outcome/judgement must be captured either against the event or the case. Once all the outcomes have been captured, the case will move to the next stage, post-trial.

2. The trial screen

1. Upon logging into Portal, click on the case under **Active cases**. The screen will be opened showing that the case process has moved to the **Trial** status. The **Trial** radio box will be selected as indicated on the screen below:

Figure 72 - Trial screen



Notes

Section 6- Motion case

1. Description

A written application made to a court or judge to obtain a ruling or order directing that some act be done in favour of the applicant. In an application, the matter is determined with reference only to the papers and as a general rule, no oral evidence is permitted.

2. Filing of Documents

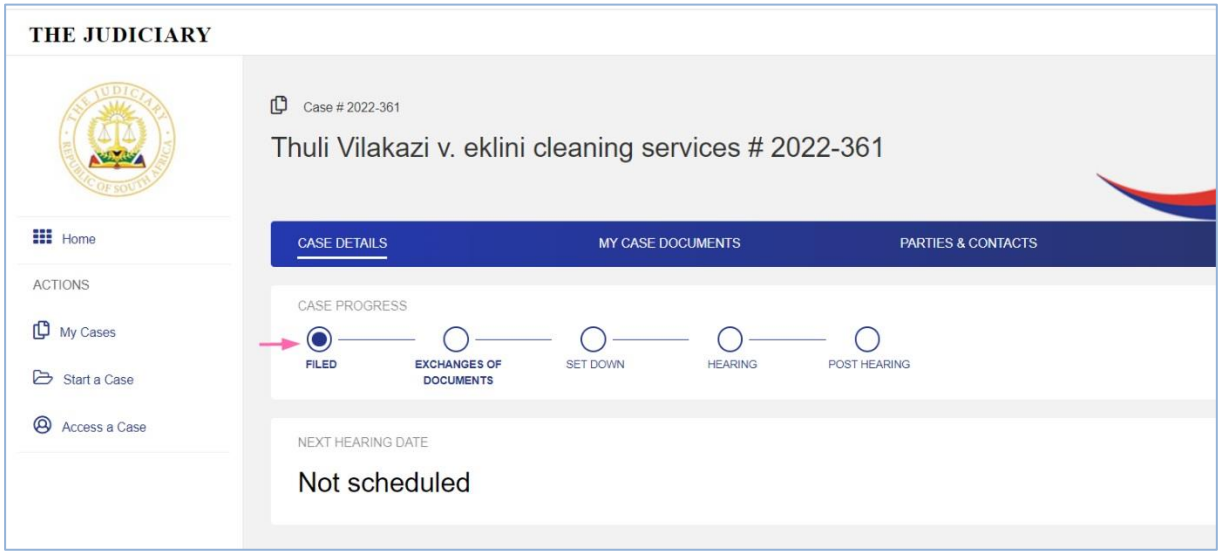
When the case is issued by the registrar it moves to the filling stage where parties can submit the required documents like the return of service.

3. Process to submit a document

The following steps must be followed to File a document on the Portal:

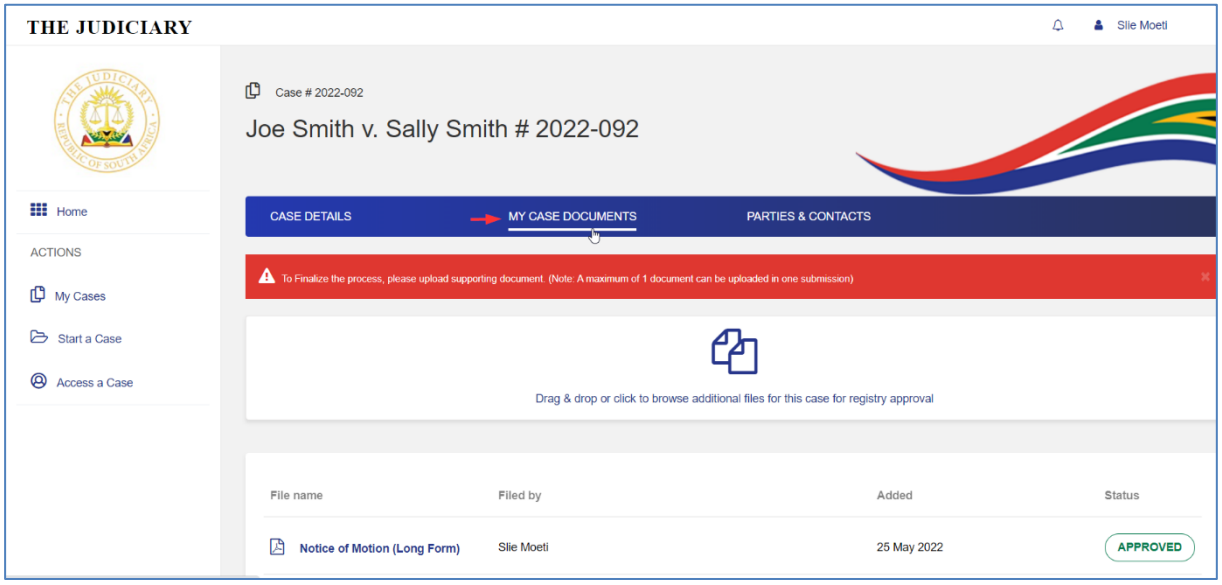
1. Upon logging into the Portal, click on **My cases** option.
2. Click on the case on the **Active cases**, option.
3. The following screen will be displayed:

Figure 73 -Filed case screen



4. The **Filed** radio box will be selected to indicate that the case has been filed.
5. Click on **My case document** menu to upload documents as displayed below.

Figure 74 - My case documents



6. Click on the **Upload** icon to upload the relevant documents.
7. Select the document type.
8. Sign the document by adding the signature.
9. Click on the **Submit** button.
10. Click on **Ok** button to close the notification screen.
11. The defendant may request access to the case and can add the **notice of intention to defend**.

NOTE

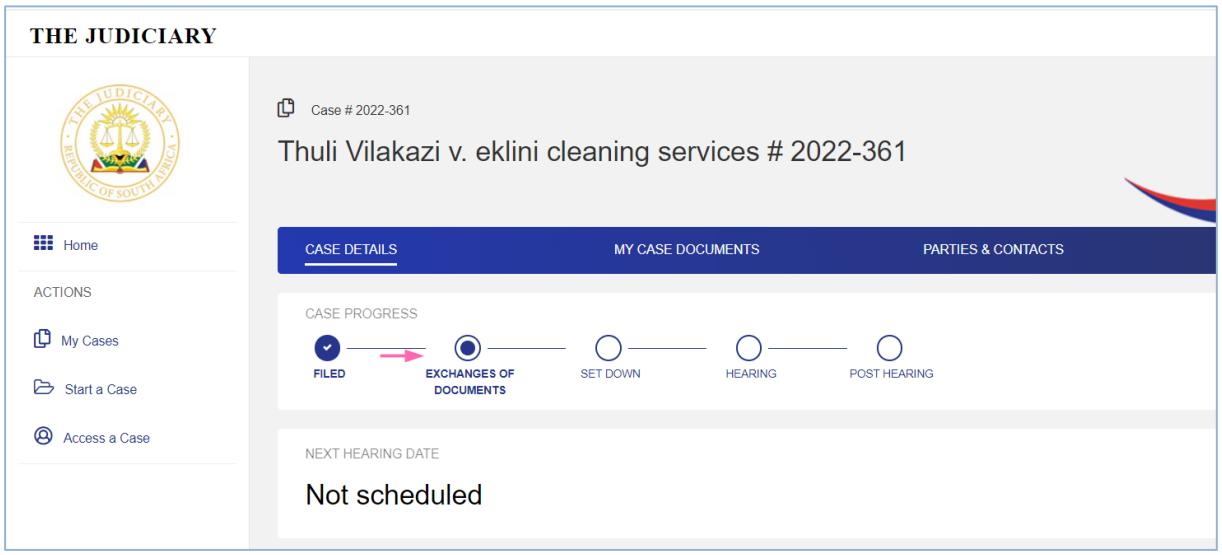
Default judgement: During the filing stage the applicant can upload documents to apply for default judgement if the respondent does not respond to the case. If the default judgement is granted the case status will be changed to post hearing status.

4. Exchange of documents

This is a stage where the different representatives will be exchanging documents or pleading in the case.

1. The **Exchange of documents** radio box will be selected to indicate that the documents may be shared between the two parties in the matter as illustrate on the screen below:

Figure 75 - Exchange of documents stage

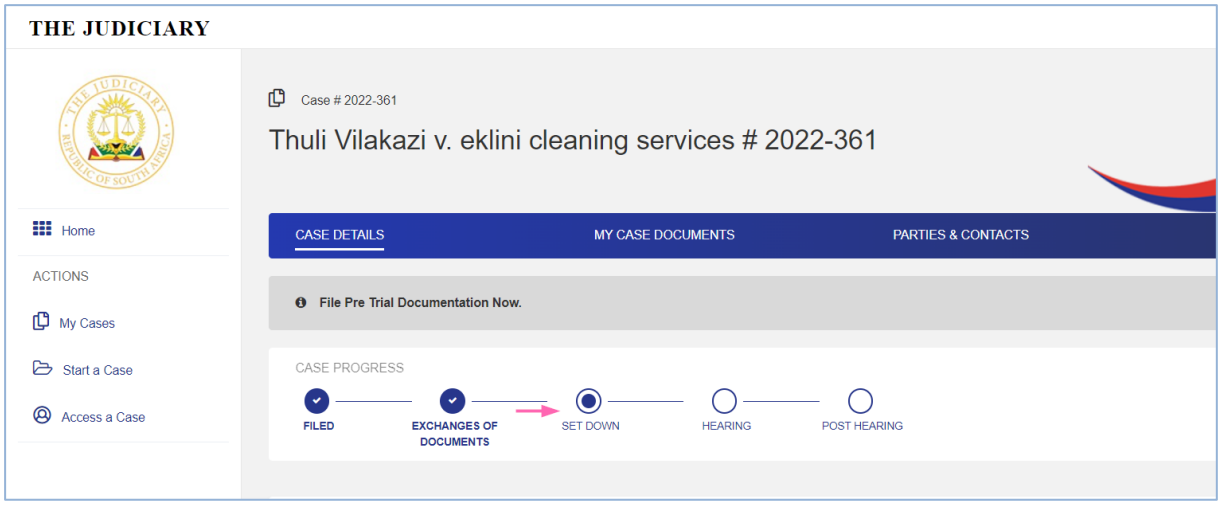


5. Set Down

When the process of exchange of documents is completed, the application is set down for hearing where the parties will attempt to prove, with evidence, what is averred in the exchange of documents.

1. The **Set down** radio box on will be selected to indicate the status as illustrated on the screen below:

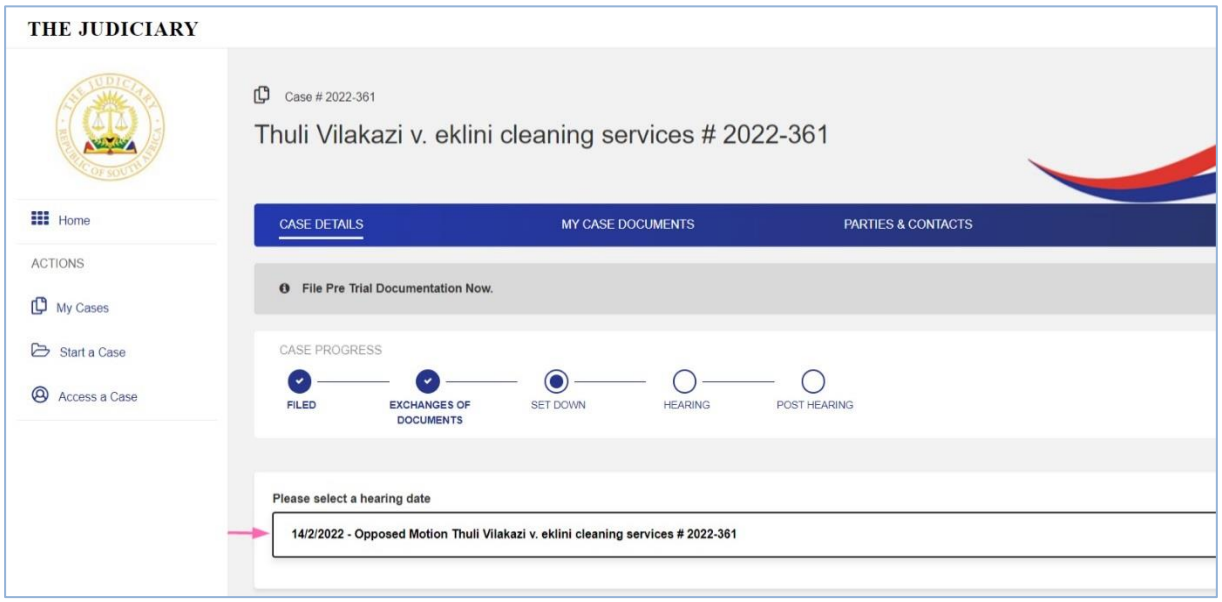
Figure 76 - Set down



6. Ready for hearing

The parties indicate their readiness for a hearing.

Figure 77 – Case details - Hearing date selection



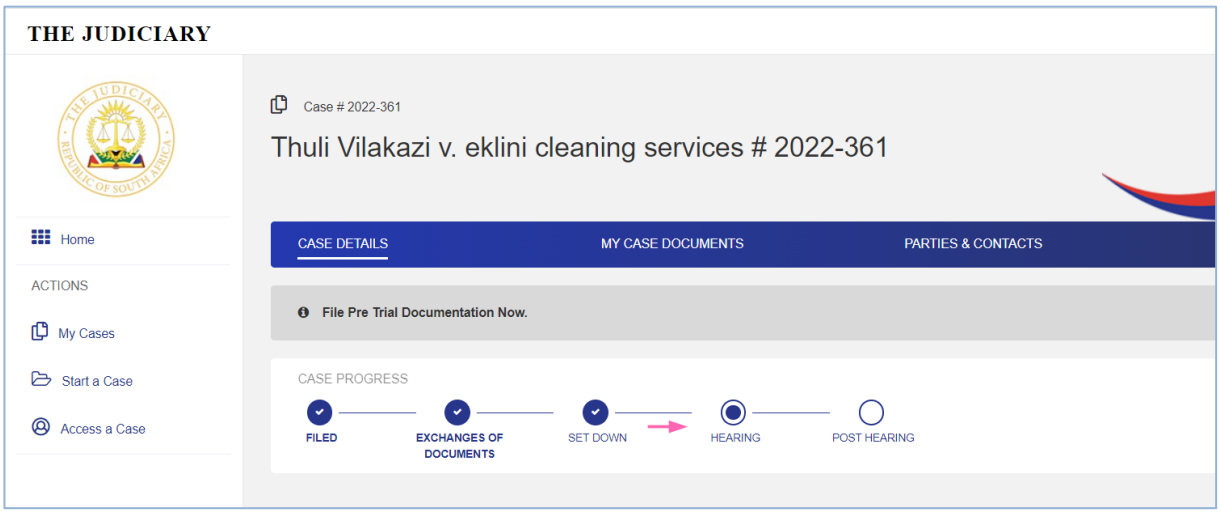
1. Select the event on **Please select a hearing date** drop down list.
2. Click on the **Upload** icon to upload the relevant documents.
3. Select the document type e.g. practice notes.
4. Sign the document.
5. On the **Trial readiness** option indicate whether the user is ready for trial or not.
6. Indicate the estimated duration of the trial/hearing on **Hearing estimate** field.
7. Indicate hearing estimate units by selecting from the drop-down list.

7. Hearing

The presiding judge shall decide on the appropriate mode of hearing to address the application. When the hearing is conducted the outcome will be recorded.

1. The **Hearing** radio box will be selected to indicate that the status of the case is at the hearing stage.

Figure 78 - Hearing

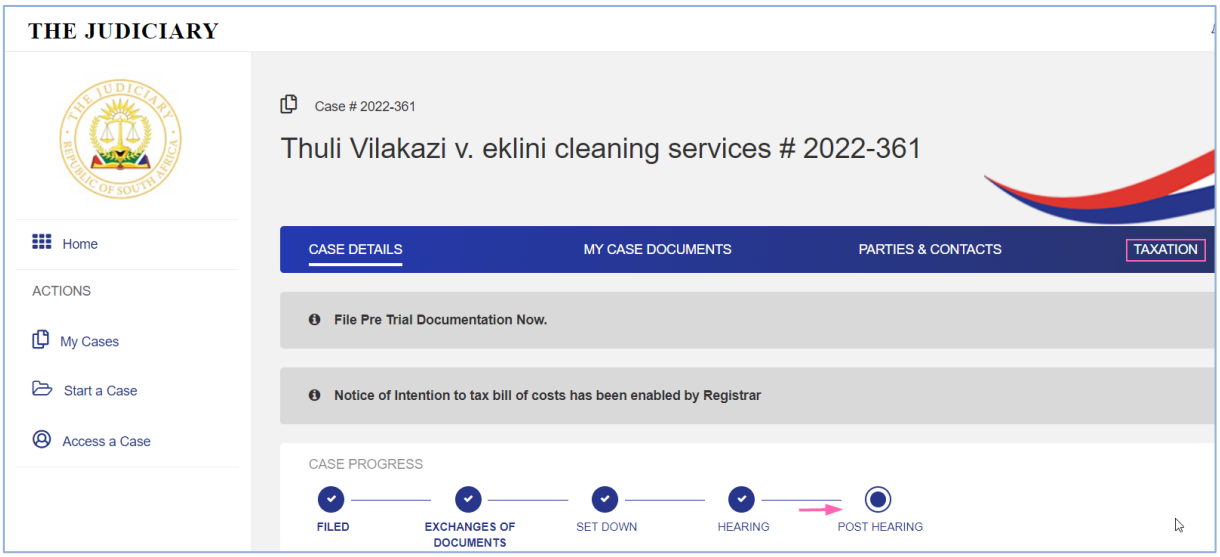


8. Post Hearing

When the hearing process is concluded, the trial will then proceed to the post hearing status. The **Taxation** tab will be available on the post hearing step. To file for taxation, follow the steps in Chapter 4; Section 8 **Taxation.**

1. The Post hearing radio box will be selected to indicate that the trial is at the post hearing stage.

Figure 79 - Post hearing



Section 7- Appeal case

1. Description

Where a dissatisfied litigant is of the view that the judgment ought to be set aside because the court reached the wrong conclusion on the facts or law, the appropriate remedy is to appeal. Since an appeal involves re-evaluation of the court's decision, it will be based solely on the record of the proceedings.

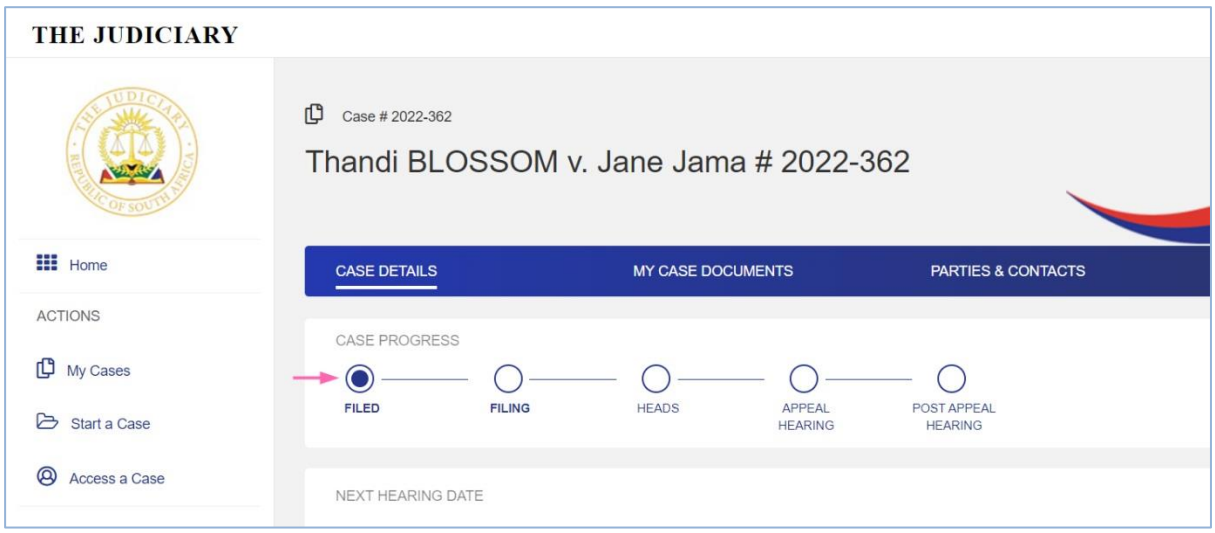
Appeal proceedings are instituted by lodging an application for leave to appeal. Leave to appeal is not granted automatically and the party bringing the application must first apply for leave to appeal to the court that handed down the decision.

2. Filing of documents

When the case is issued by the registrar it moves to the filed stage where the appellant can submit the required documents like the return of service.

1. The **Filed** radio box will be selected to show that the appeal is at a stage where it is at the filed stage as illustrated on the screen below:

Figure 80 - Filed stage Appeal case



3. Submit a Document

The following steps must be followed to file a document on the Portal:

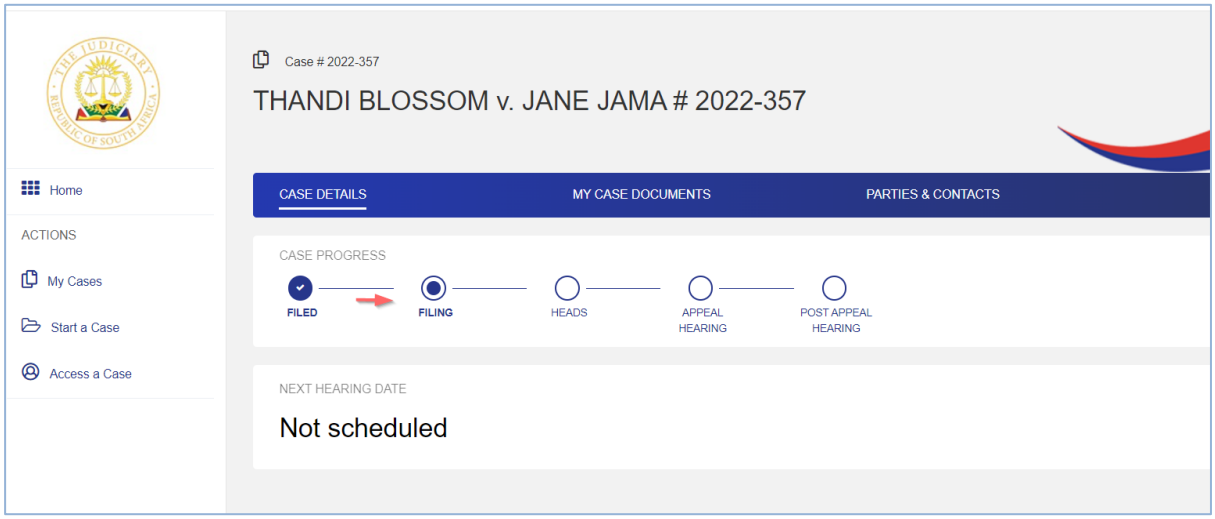
1. Upon logging in to the Portal, click on **My cases** option.
2. Under **Active cases**, click on the relevant appeal case.
3. Click on **My case documents** to upload the documents.
4. Select the type of document uploaded and sign the document.
5. Click on the **Submit** button to file the document.
6. Click on the **Ok** button to close the notification screen.

4. Filing Stage

During the filing stage the appellant will upload the relevant documents required for the appeal process. Once the registrar has received all the documents, the case is moved to the next stage, heads of arguments.

1. The **Heads** radio box will be selected to indicate that the appeal is the stage where heads of arguments will be heard.

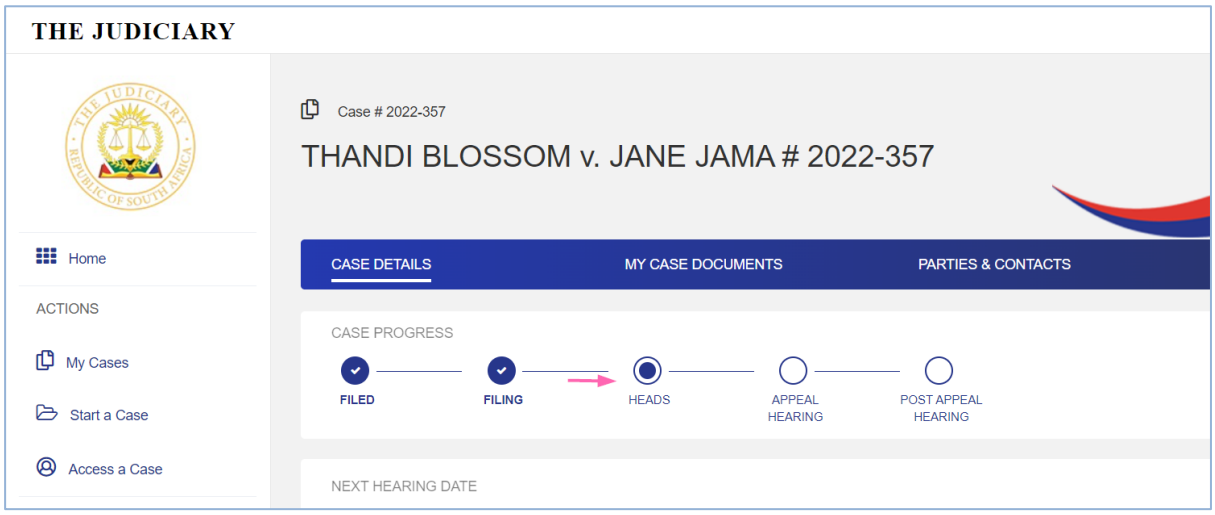
Figure 81 - Filing stage Appeal case



5. Heads

The legal representatives must each upload all necessary documents, heads of argument and practice notes.

Figure 82 - Heads

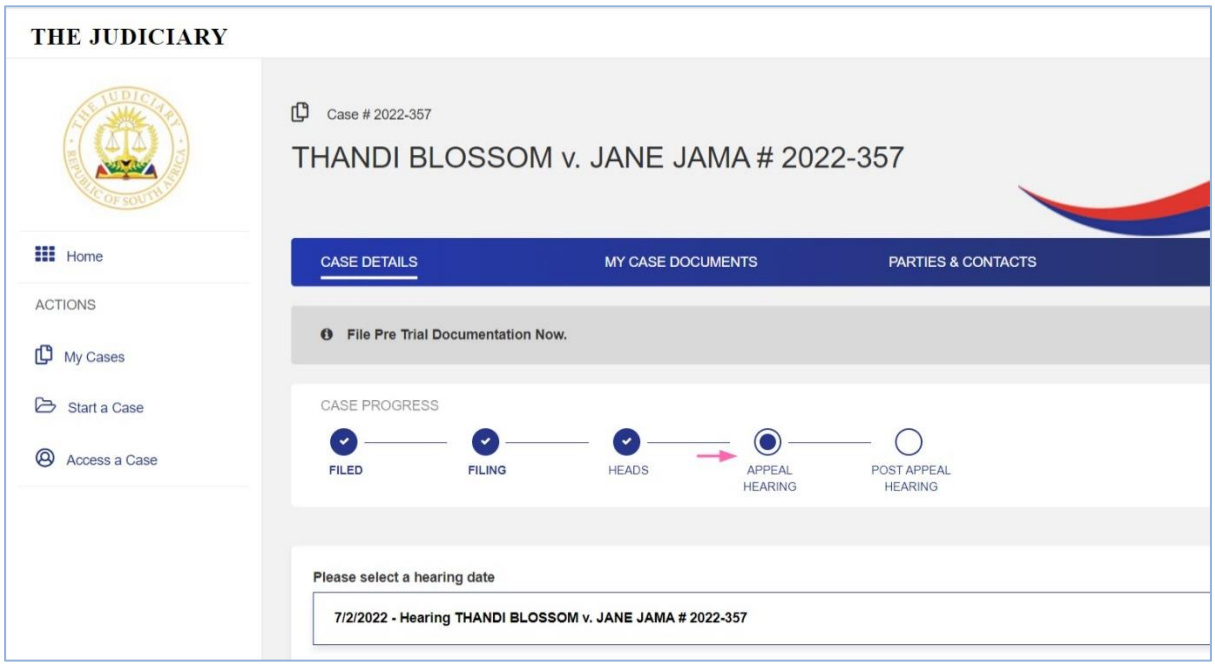


6. Appeal Hearing

When the case is at appeal hearing that means the case is enrolled. All the endorsements will be captured as outcomes. The judge will give the outcome/ judgment regarding the case conducted. That outcome/judgment should be captured either against the event or the case. Once all the outcomes have been captured, the case will move to the next stage, post appeal hearing.

1. The **Heads** radio box will be selected to indicate that the appeal is the stage where heads of arguments will be heard.

Figure 83 - Appeal hearing



7. Post Appeal Hearing

After the hearing the case moves to post appeal hearing stage. The **Taxation** tab is available on the post hearing step. To file for taxation, follow the steps in Chapter 4; Section 8 Taxation.

Figure 84 - Post appeal hearing



Section 8- Taxation

1. Description

This function enables a Portal user to submit a notice of intention to tax bill of costs together with all the bill(s) to be taxed. The taxation process contains 4 options;

a) Settled Bills
b) Notice of Intention to Tax Bill of Costs;
c) Notice of Objection to Tax Bill of Costs; and
d) Taxation Hearing.

The following steps must be followed when the case is in post-trial stage.

1. Upon logging into the Portal, click on the case under **Active cases**.
2. The screen will be opened showing that the case process has moved to post trial as indicated on the screen below:

Figure 85 - Post trial screen

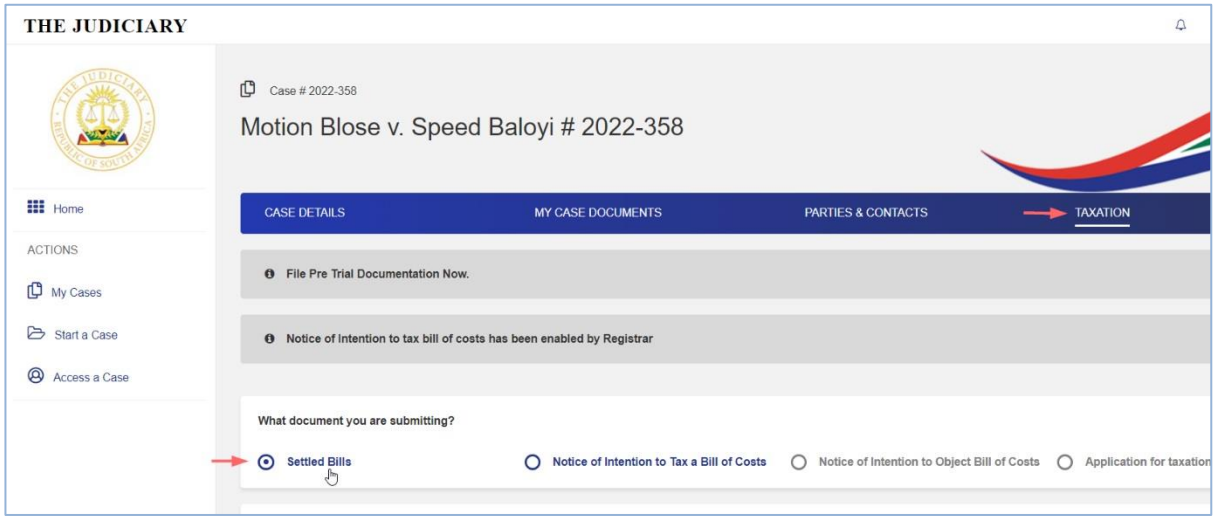


2. Upload settled bills

These steps must be followed to upload settled bills:

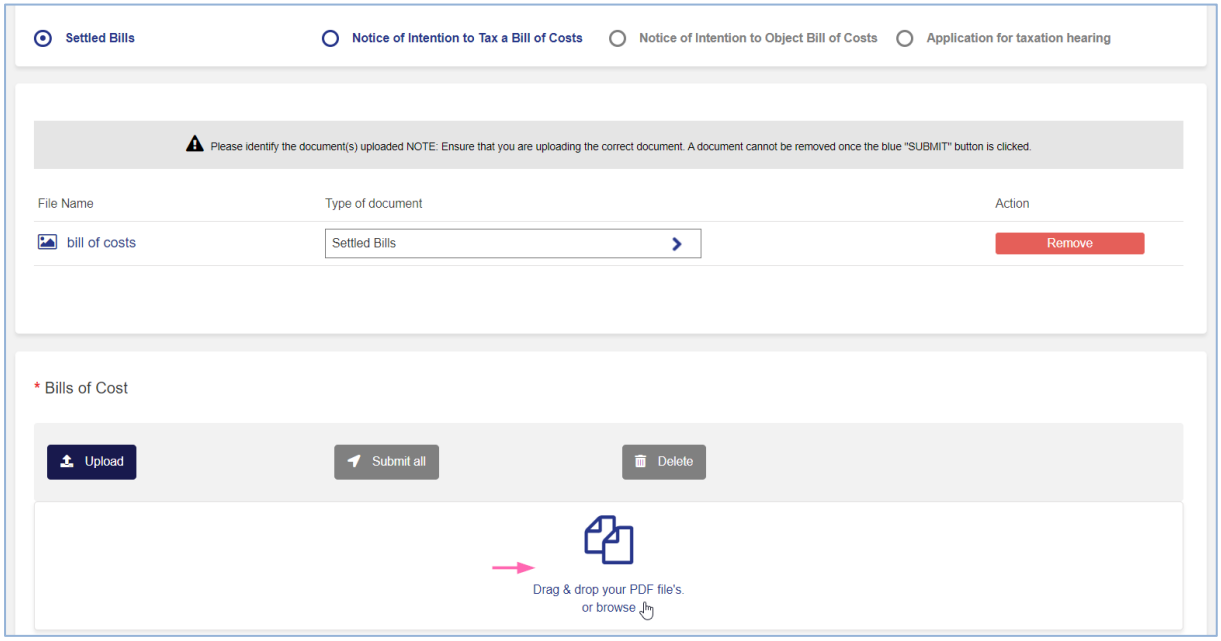
1. Click on the **Taxation** tab.
2. Click on the **Settled bills** radio button as shown in **Figure 86**

Figure 86 - Settled bills button



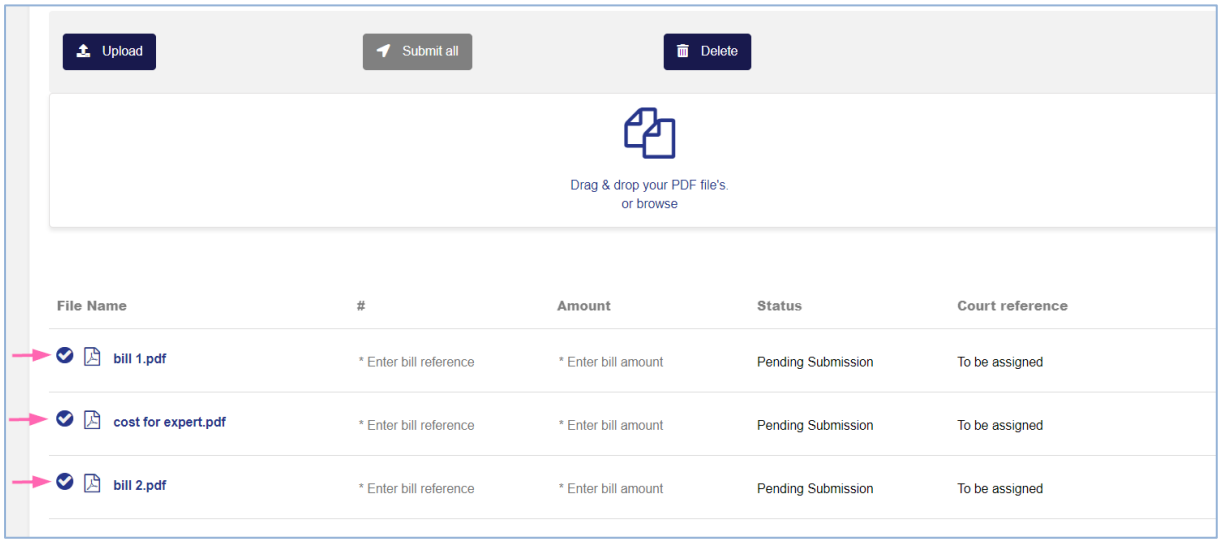
3. Upload documents
4. Select the document type by selecting the settled bills document type.
5. To upload the individual settled bills, Click on upload document option as displayed in **Figure 87**

Figure 87 - Settled bills: Drag and drop button



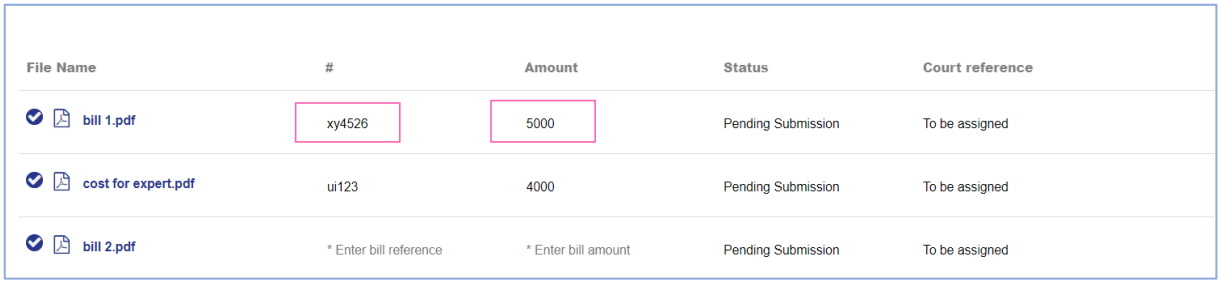
6. Select the bills to upload
7. Click on the **Open** button.
8. The bills are displayed at the bottom of the window as shown in **Figure 88**.

Figure 88 - Individual bills



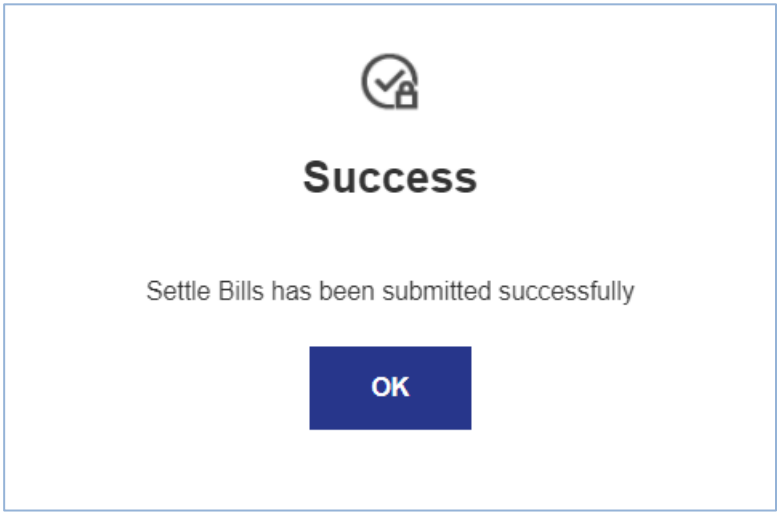
9. For each bill loaded enter a bill reference and the bill amount.

Figure 89 -Bill reference and Bill amount



10. Click on the **Submit all** button.
11. The settled bills will be submitted.
12. Click on **O**k button to confirm and close the notification screen as illustrated below:

Figure 90 - Settle bills submitted button

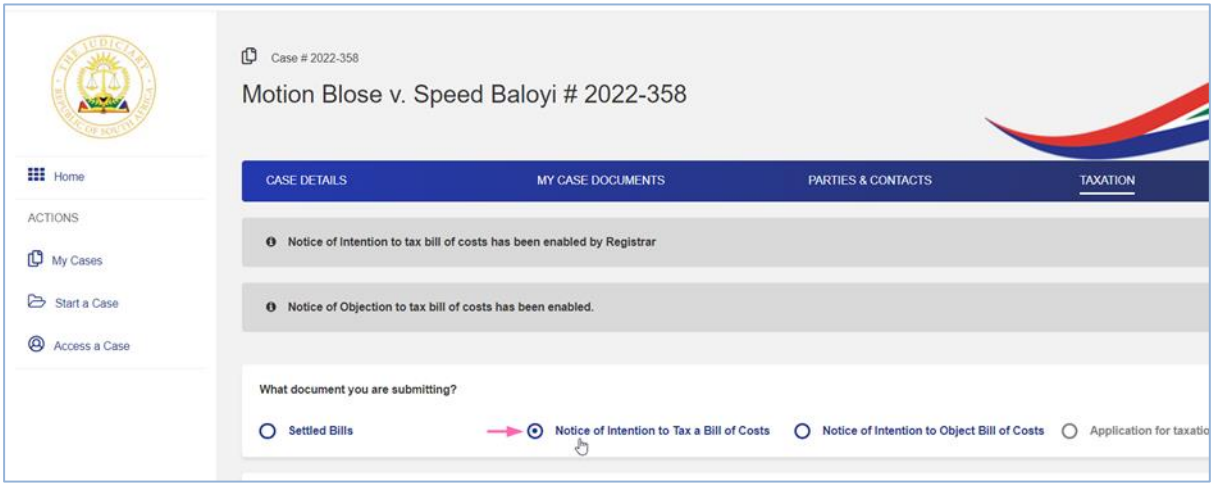


3. File notice of intention to tax bill of costs

Follow the following steps to file notice of intention to tax bill of costs:

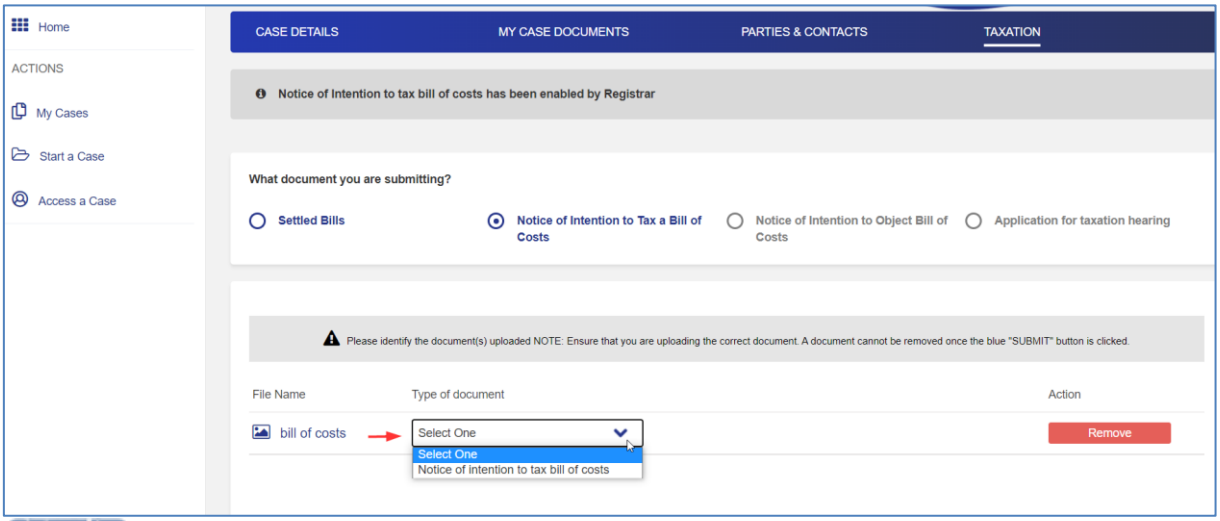
1. Click on the **Taxation** tab to upload the notice of intention to tax bill of costs.
2. Click on **Notice of intention to tax a bill of costs** radio button as illustrated below:

Figure 91 - Notice of intention to tax bill of costs



3. Upload the document.
4. Select Notice of intention to tax bill of cost on Type of document as displayed below.

Figure 92 - Notice of intention to tax bill of cost document type

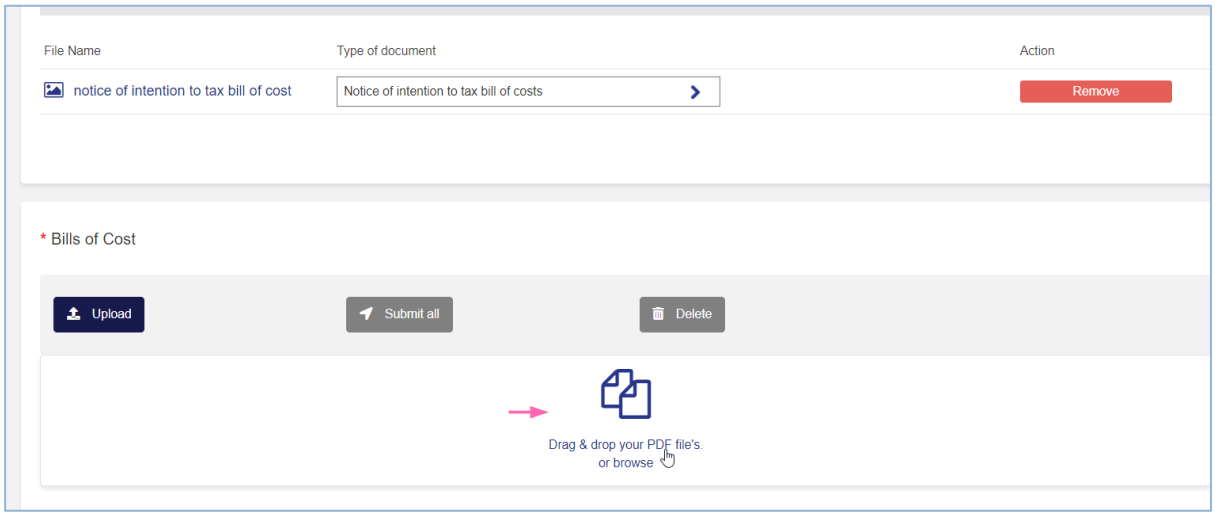


NOTE

Only one (1) notice of intention to tax bill of costs is allowed per case.

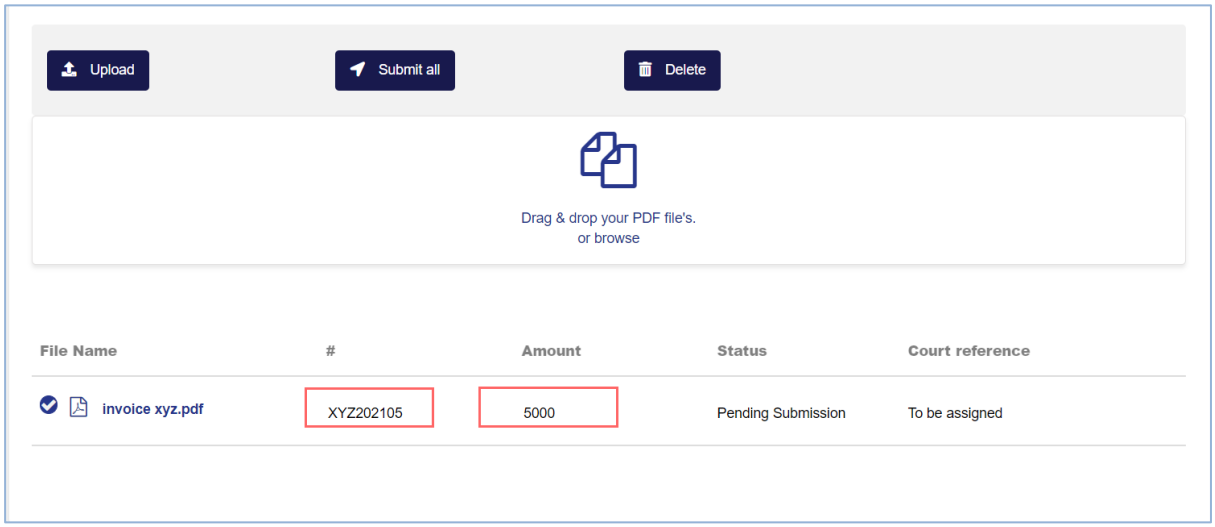
5. To upload the individual bills, click on the **Drag and drop** button document button as displayed in Figure 93.

Figure 93 – Drag and drop button



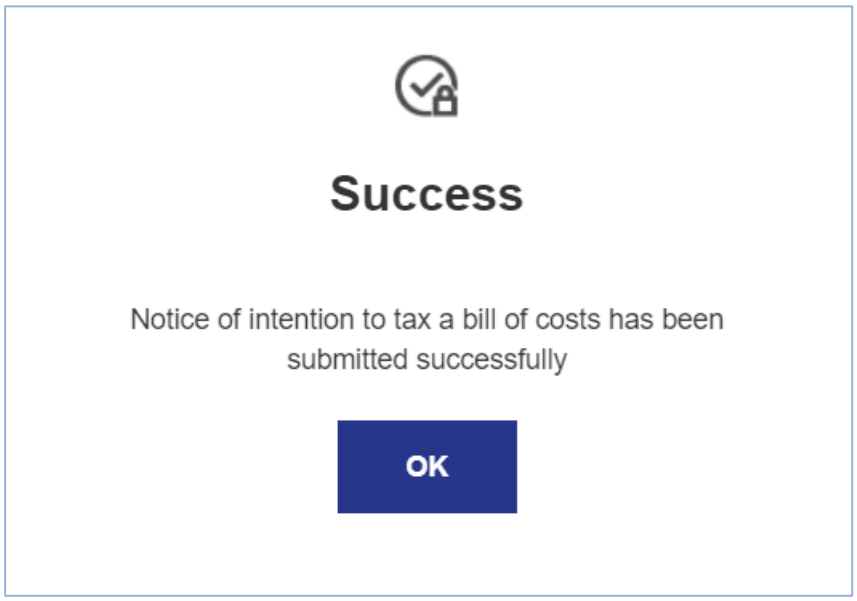
6. User uploads each individual bill (document) as a separate PDF. Multiple file select / upload is available to the user for each individual bill uploaded.
7. For each bill the user must add a reference and the bill amount

Figure 94 - Add Reference and amount



8. Tick all the bills to select them and click on **Submit all**
9. A notification will be displayed to indicate that the notice of intention to tax bill of costs has been submitted.

Figure 95 - Notification



10. Click on the **Ok** button to close the notification screen

4. Notice of objection to tax bill of costs

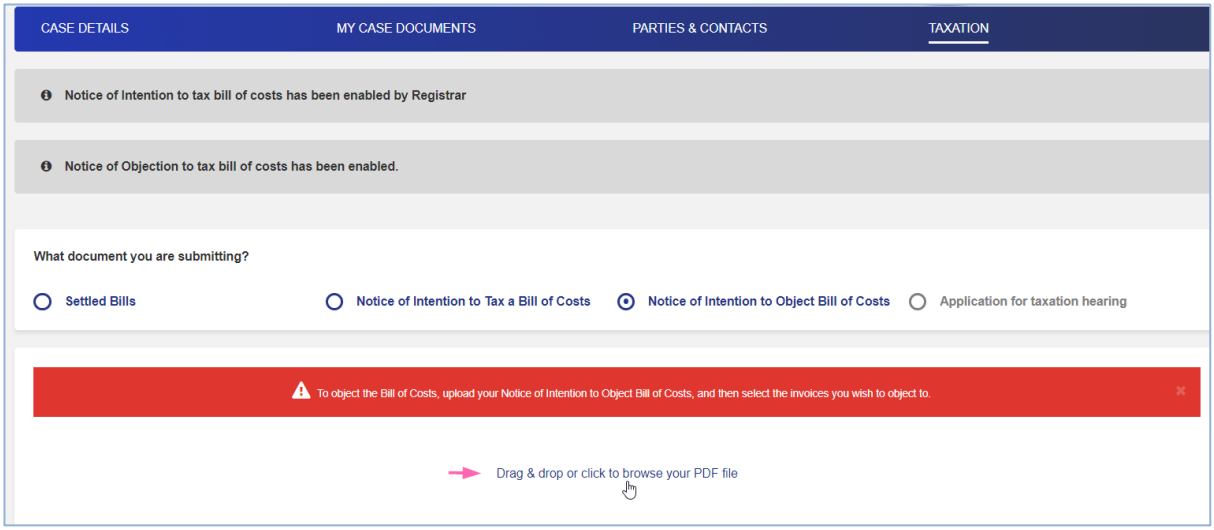
This feature enables a portal user to submit a notice of objection to tax bill of costs and to identify the bills to which the user objects.

5. Process to file Notice of objection to tax bill of costs

The steps must be followed to access Notice of Intention to Object Bill of costs

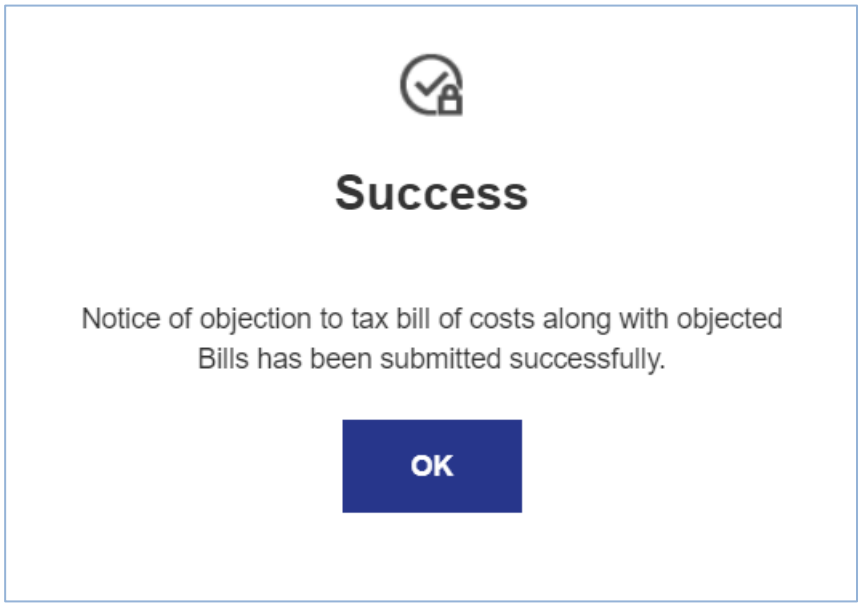
1. The portal user clicks on the **Taxation** tab
2. Select the **Notice of intention to object bill of costs** radio button
3. Upload your **Notice of intention to object bill of costs** document

Figure 96 - Upload Notice of Intention to Object Bill of costs



4. Selects the bill(s) that user objects to and click on **Submit selection**. The system updates the status of each bill objected to.
5. A notification will be displayed to indicate that the notice of objection to tax bill of costs has been submitted.

Figure 97 - Notification



6. Click on the **Ok** button to close the notification screen.

6. Application for Taxation hearing

This function enables a Portal user to apply for a taxation hearing.

To apply for a taxation hearing, the following steps must be followed:

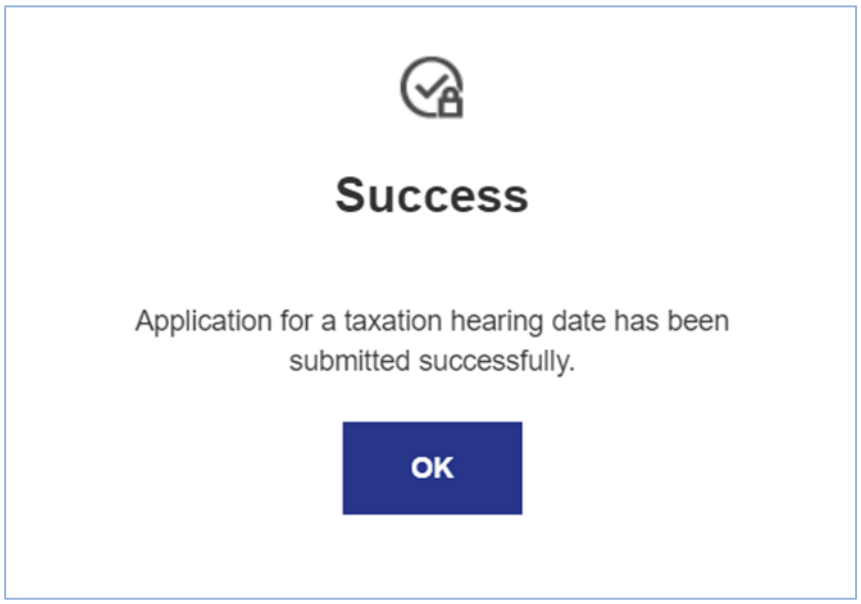
1. Click on the **Taxation** tab.
2. Select **the application for taxation hearing** radio button.

Figure 98 - Application for taxation hearing



3. Upload the document for the taxation hearing date.
4. Select the document type e.g. taxation hearing document and sign the document
5. Click on the **Submit** button.
6. The following notification screen will be displayed:

Figure 99 - Notification



7. Click on the Ok button.
8. The application will be sent to the registrar for approval.
9. The portal user will receive a notification once the application document has been filed.
10. A taxation hearing will be scheduled by the registrar. After the hearing, the registrar will update the taxation details on the system.

Notes

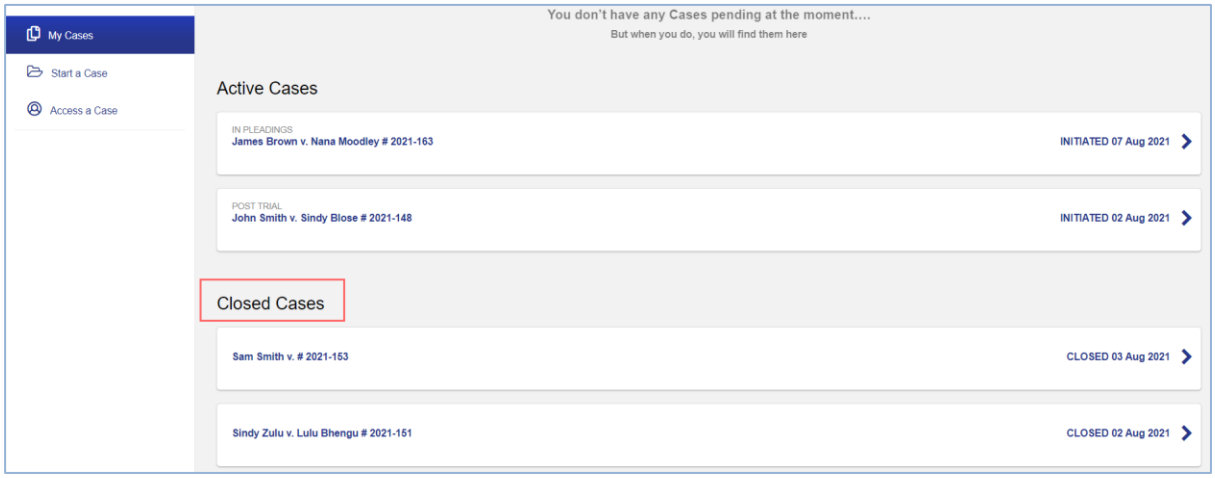
Section 9- Closed cases

1. Description

When the case is closed it will be marked as closed and the Portal user will not be able to open the case to view the case details.

1. Upon logging into the Portal, click on **My cases**.
2. The following screen will be displayed

Figure 100 - Closed cases



3. Close cased are listed at the bottom of the screen.

Notes

Annex A:Distribution list

Annex A: Name	Annex B: E-mail
Lillian Makgolela	Lillian.Lenyai@sita.co.za
Jenny Naidoo	Jenny.Naidoo@sita.co.za
Liliana Cortesi	Liliana.cortesi@sita.co.za