# Initiate Summons for Oral Examination

This guide provides details on:

How to attach and initiate a Summons for Oral Examination to an existing case

How to pay for the document

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|  | **Prerequisites:** Before completing the steps in this user guide, ensure you have access to the case where the **Summons for oral examination** is to be requested. |
|  | **Note**: References to ‘***submission***’ on the CMS Portal, and in related documentation, refers to the process of electronically filing a document through the portal and should not be confused with other definitions related to ‘submission’ in a legal context. |

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| Step | Action | | Result |
|  | Log into the CMS Portal | | The CMS Portal screen displays:  Graphical user interface, website  Description automatically generated |
|  | Click: **File on One of My Cases**  File on One of My Cases button. | | The **My Account** screen displays with the **Cases** tab selected  A screenshot of the Cases tab within the My Account screen, with some fields displayed. |
|  | Type information in the **Search Case** fields to search for the relevant case, or locate the case in the list below the search fields  A screenshot of the Search Case screen with the First Name, Last Name and relevant case highlighted. | | |
|  | **Hint**:  If your case displays in the list at the bottom of the page, proceed  to step 5, if not then complete step 4 to search for the case. | |
|  | Click: **Submit**  **Submit button** | | The **Results** section displays cases matching the search criteria.  A screenshot of the result from a case search. |

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| Step | Action | Result |
|  | In the **Action** column, select: **File a Subcase**  The ACTION column displays with File a Subcase highlighted. | The **Add Subcase** screen displays: |
|  | Complete the required panels and fields:  Fields marked with a red asterisk \* are mandatory.   |  |  |  | | --- | --- | --- | | Panel: My Reference | | | | In this field … | | Provide this information … | | My Reference | | Type a reference used to identify the document to be filed.  Screenshot of the My Reference field completed with the words Summons for oral examination | | Panel: Subcase Details | | | | Subcase Type | Type **Summons for oral examination** or open the **Subcase Type** menu and select from the options. | | | Panel: Subcase Initiating Document | | | | Code / Name | Displays **Form 67A – Summons to attend for oral examination**.This cannot be changed. | | | |
|  | |  |  |  |  | | --- | --- | --- | --- | |  | Note: The information typed into the following fields is used to create the Summons for oral examination subcase. | | | | Panel: Additional Information | | | | | In this field… | | Provide this information… | | | Amount awarded on claim $ | | Type the total amount owed by the judgment debtor. | | | Costs ordered $ | | Type the Costs ordered. | | | Interest $ | | Type the amount of interest charged on the Order. | | | Amount paid since order made $ | | Type the amount already paid on the order. | | | Professional Costs $ | | Type the fees for Professional Costs. | | | Filing fee $ | | Type the fees incurred for Filing the document. | | | Service fee $ | | Type the fees incurred for serving the document. | | | Conduct money $ | | Type the allowance allocated for the debtor to get to court. | | | Other amount $ | | Type any other fees not accounted for. | | | Provide details of other amount | | Type the details of the fees associated to other amount. | | | ADDITIONAL PANELS: Interest | | | | | Manual interest calculation required | | Select either **Yes** or **No** from the menu. If required. | | |  | **Note**: If selecting **Yes,** an additional field **Percentage%** displays. Type the interest rate to be charged in this field. | | From | | Calendar iconClick the **Calendar** icon to record the date to start the interest charges. | |   *Continued…* | |
|  | *Continued …*   |  |  | | --- | --- | | ADDITIONAL PANELS: Interest | | | To | Calendar iconClick the **Calendar** icon to record the date to end the interest charges. | | Principal Amount $ | Type the total amount the interest is charged on. | | Percentage % | Displays only if **Yes** was selected. Type the interest rate to be charged. | | Interest Total $ | The total interest amount displays. | | ADDITIONAL PANELS: Filed By | | | Filed by | Tick box iconSelect the party filing the application. | | Representation | Tick box iconSelect the legal representation of the filing party if applicable.   * If your organisation has previously filed on this case, select it from the list of representatives, or * If the document you are filing is your organisation’s first appearance on the case, click:   Add Representation (1) link, with + and - buttons  Search for and select your organisation from the available fields. | | Filed Against | Tick box iconSelect the party the application is filed against. |   *Continued …* | |
|  | *Continued…*   |  |  |  | | --- | --- | --- | | ADDITIONAL PANELS: Address Details | | | | In this field… | | Provide this information… | | Address Type | | Select the address type. | | Physical Address | | Start typing the address into the search box and select the correct option from the results or manually enter the address by typing into the fields provided. | |  | **Note**: Address is required as the listing is based on where the debtor resides. The address provided here replaces any existing address listed for the Judgement debtor. | | |  | **Important:** If lodging a **Summons for Oral Examination** against a corporation, an appropriate officer of the corporation must be added via the "**Add Filed Against**" because a **Summons for Oral examination** cannot be issued to an organisation it must be issued to a person. | |   Complete the following panels and fields if filed against a corporation:   |  |  | | --- | --- | | ADDITIONAL PANELS: Add Filed Against | | | Party Designation Type | Displays as Person, can change to Person Single name if required. | | Party Type | Displays Non-Party; this cannot be changed. | | Party Sub Type | Displays Officer of the corporation; this cannot be changed. | | Surname/Single Name | Type the officer of the corporation Surname or Single Name. | | First Name | Type the first name of the corporation officer. | | Middle Name | Type the middle name of the corporation officer. |   *Continued …* | |

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| Step | Action | | Result | |
|  | *Continued…*   |  |  | | --- | --- | | ADDITIONAL PANELS: Address Details | | | In this field… | Provide this information… | | Address Type | Select the address type. | | Physical Address | Start typing the address into the search box and select the correct option from the results. | | ADDITIONAL PANELS: Related Orders | | | Related Orders | Tick box iconSelect the related claim order. | | Are you applying to waive the fee? | Displays: **No**. Change to **Yes** if required. | | | | |
|  | Click: **Proceed**  **Proceed button** | | The **My Account** screen displays:  Screenshot of the Cart tab within the My Account screen displaying an item requiring payment. | |
|  | Select the item requiring payment Click: **$Submit Payment**.  Submit Payment button | | The **Process Payment** screen displays: | |
| The Process Payment screen with Filing Information, Payment Options with ePayment selected as a default, the Continue and Back buttons. | | | |
|  | Radio buttonIn the **Payment Options** panel, select . a payment method, then click: **Continue**  **Screenshot of the Payment Options with ePayment selected as a default, plus Continue and Back buttons.** | |  | **Please See**: Payment options can be added and removed from the **My Account** screen. For more information, please see User Guide: **My account features** |
|  | **Note**: If **ePayment by Credit/Debit card** is selected, a popup displays.  Enter your payment details, then click: **Make Payment**  Make Payment button | | |
|  | The Document is filed. | | The **Confirmation of Filing** screen displays:  Confirmation of Filing notification displays - filing submitted and payment made. | |

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|  | OPTIONAL: To view the status of the subcase, click: **My Account**  My Account button | | The **My Account** screen displays the **Filings** tab:  Filings tab within the My Account screen, with a Search button and recent filings. |
|  | **Note**: In the **Filing Status** column, the **Summons for Oral Examination** has a status of **Accepted.** This is an auto-accepted smart form. A hearing date has also been set and is viewable in **Hearings.** | |
| |  |  | | --- | --- | |  | | | Field | Description | | **Filing Date** | Shows filing date - the most recently filed document displays first. | | **My Reference** | Displays the reference typed when filing the document. | | **Case/Record Number** | Assists with locating filings. | | **Filing Status** | Shows the filing’s live status. Documents in:   * **Pending Review** status have not been reviewed by registry staff yet. * **Accepted** status have been reviewed and approved, or automatically approved by the CMS Portal * **Rejected** status have been rejected by registry staff. | | Action/**View** | Allows you to view the **Case Summary** screen for the relevant case. | |  |  | | | |

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|  | OPTIONAL:  To view the scheduled hearing, Click: Cases tab  Then from the cases at the bottom of screen Click the **Case Number**  **Case Number column with relevant case highlighted** | | The **Filings** screen displays:  A screenshot of the Filings screen for the relevant case. |
|  | **Note**: To view the scheduled hearings, click: **Hearing** tab. The next scheduled hearing can also be seen on the top right of the **Summary** screen. | |
| **Case summary displays with the Hearings tab and hearing details highlighted.** | | |