# 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 selectedA 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 fieldsA 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.

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| 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. |

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|  | 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. |

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| 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 - buttonsSearch for and select your organisation from the available fields. |
| Filed Against | Tick box iconSelect the party the application is filed against. |

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| 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:

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| 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. |

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| Step | Action | Result |
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| 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. |

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|  | 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 paymentClick: **$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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| Step | Action | Result |
|  | 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.** |
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| 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.
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| Action/**View** | Allows you to view the **Case Summary** screen for the relevant case. |
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| Step | Action | Result |
|  | 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.** |