eFiling Training Manual

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Getting Started:

Registration

To use the application, you will first need to register. Follow the instructions below to create a Filer account. If you are registering assistants and paralegals, it is important that you register them first. Register the attorney last so that you may add the registered assistants UserID to the filing delegate section.

1. Enter the following registration information.
   - **Location** (required) Select where you will file and serve.
   - **User ID** (required) Enter a User ID between six and fifteen characters. Do not include spaces.
   - **Password** (required) Enter a Password between eight and ten characters including at least one number and a lowercase letter. The password is case sensitive. For example, you will receive an error message if a capital "C" is replaced by a lower case "c".
   - **Confirm Password** (required) Confirm you have entered the correct password by entering the same data you entered in the Password field.
   - **First Name** (required) Acceptable characters include: letters, numbers, space, single quote ('), comma (,), hyphen (-), period (.).
   - **Middle Initial**
   - **Last Name** (required) Acceptable characters include: letters, numbers, spaces, single quote ('), comma (,), hyphen (-), period (.).
   - **Type of Filer** (required) Select the role that most represents your work.
     - Attorney
     - Pro Se
     - Paralegal
     - Attorney's Assistant
   - **Bar Number** (required only if Type of Filer is Attorney)
   - **State of Bar Record** (required only if Type of Filer is Attorney)
   - **Driver's License #** (required only if Type of Filer is Pro Se) Acceptable characters include: letters, numbers, comma (,), period (.).
   - **Driver's License State** (required only if Type of Filer is Pro Se)
   - **Email Address** (required) Enter the Email Address to which all eFiling notifications regarding filings and service will be sent. Associates, who are assigned as delegates, will get copies of all eFiling notifications sent to the attorney. Be sure to put the attorneys email address under his/her account and the assistants email address under his/her account. Each will be copied on eFiling notifications. (Note: Only the attorney will receive eService notifications.)
   - **Confirm Email Address** (required) Confirm that you have entered the correct Email Address by entering the same data you entered in the Email Address field.
   - **Law Firm or Organization** (required) Enter the name of your law firm or organization. Acceptable characters include letters, numbers, spaces, commas, periods, apostrophes ('), hyphens (-), colons (:), semicolons (;), quotes ("), parentheses ("(" and ")"), ampersands (&) and at signs (@).
   - **Organization Contact Person** (required)
   - **Government Agency** Enter 'Yes' if you are filing for a Government Agency.
   - **Filing Location Time Zone** (required) The time zone of your primary work place.
   - **Address Line 1** (required) Acceptable characters include: letters, numbers, space, sharp sign (#), single quote ('), comma (,), hyphen (-), period (.).

- **Address Line 2**
- **City** (required) Acceptable characters include: letters, numbers, space, single quote (‘), comma (,), hyphen (-), period (.).
- **State** (required)
- **Zip Code** (required) Use the format 55555. (Note: Do not use four digit extension)
- **Phone** (required) Use the format 555-555-5555.
- **Fax Number** (required) Use the format 555-555-5555.
- **Organization Website - optional**
- **Organization Email - optional**

2. Add or delete **Delegates** who can file and serve on your behalf.
   - To add, enter the delegate’s User ID in the Add User ID field and select the **Add** button.
   - To delete, select a User ID and select the **Delete** button. Only users with a Type of Filer role of Attorney can add delegates.
3. Enable the clerk to modify your filing fees by checking the **Allow the Clerk to Modify** checkbox.
   - Changes made by the clerk may cause the cost of the filing to go up or down. If you do not select this option and the filing fees need to be changed, the Clerk may reject the filing.
4. Read the **User Account Agreement** and, if you agree, check the box next to **I have read and understand this Agreement.**
   - Checking the box is equivalent to signing a paper contract.
   - Print the User Account Agreement by selecting the **Print a Copy** link. The agreement appears in a new window formatted for printing. Select **Print Agreement** to confirm printing the agreement.
5. Select the **Register** button to submit your registration.
   - Any errors discovered by the program are listed at the top of the page. Correct these errors, reenter information in the Password and Confirm Password fields (these values are not saved if your registration was unsuccessful), then select the **Register** button again.
   - A Service Provider Terms and Conditions agreement will appear.
6. You must agree to the **Terms and Conditions** to complete the registration.

Logging in to eFiling

Log in to the application using the steps below. If you have pop-up blocker installed on your computer please disable it or choose the option "always allow from this site" to ensure that you can view all the functionality in the application. If you have not yet registered select the **If you are not registered, Click here** link.

1. Enter the following login information:
   - **User ID** (required) Your User ID is case sensitive.
   - **Password** (required) The password is case sensitive.
   - **Implementation** (required)
2. Select the **Login** button.
   - If your User ID or Password fails, you will see the message “Login Failed”. Reenter your User ID and Password. (For more information on how to retrieve your password or User ID see Resetting your Password & Retrieving your User ID).

Changing Your Password

Note: UserID’s can not be changed.

1. Enter the following information to change your current password:
   - **Current Password** (required) Enter your current password.
   - **New Password** (required) Enter your new password, which must be between eight and ten characters, including at least one number and a lowercase letter. The password is case sensitive.
   - **Confirm Password** (required) Confirm that you have entered the correct new password by entering the same data you entered in the New Password field.
2. Select the **Submit** button and you will see the message “You have successfully reset your password. You may now continue.” You will be required to log in again using your new password.
   - If you receive the error “The passwords do not match,” reenter your new password in the **New Password** and **Confirm Password** fields. The values must be identical.

Editing Account Information

The Edit Account Information section allows you to update your personal and organization information, assign and remove delegates and enable or disable the clerk’s ability to make changes to the filing.

1. Update the following information:
   - **First Name** (required) Acceptable characters include: letters, numbers, spaces, single quote (‘), comma (,), hyphen (-), period (.).
   - **Middle Initial.**
   - **Last Name** (required) Acceptable characters include: letters, numbers, spaces, single quote (‘), comma (,), hyphen (-), period (.).
   - **Type of Filer** (required) Select the role that most represents your work.
     - Attorney
     - Pro Se
     - Paralegal
     - Attorney's Assistant
   - **Bar Number** (required only if Type of Filer is Attorney)
   - **State of Bar Record** (required only if Type of Filer is Attorney)
   - **Driver’s License #** (required only if Type of Filer is Pro Se)

- **Driver's License State** (required only if Type of Filer is Pro Se)
- **Email Address** (required) Enter the Email address to which all eFiling notifications regarding filings and service will be sent. (Note: Only attorneys will receive eService notifications)
- **Confirm Email Address** (required) Confirm that you have entered the correct Email Address by entering the same data you entered in the Email Address field.
- **Law Firm or Organization** (required) Enter the name of your law firm or organization. Acceptable characters include letters, numbers, spaces, commas, periods, apostrophes ('), hyphens (-), colons (:), semicolons (;), quotes ("), parentheses ("(" and ")"), ampersands (&) and at signs (@).
- **Organization Contact Person** (required)
- **Government Agency**. Enter 'Yes' if you are filing for a Government Agency.
- **Filing Location Time Zone** (required) Enter the time zone of your primary work place.
- **Address Line 1** (required) Acceptable characters include: letters, numbers, spaces, sharp sign (#), single quote ('), comma (,), hyphen (-), period (.).
- **Address Line 2**
- **City** (required) Acceptable characters include: letters, numbers, spaces, single quote ('), comma (,), hyphen (-), period (.).
- **State** (required)
- **Zip Code** (required) Use the format 55555. (Note: Do not use the four digit extension)
- **Phone** (required) Enter the phone number where you can be reached. Use the format 555-555-5555.
- **Fax Number** (required) Use the format 555-555-5555.
- **Organization Website- optional**
- **Organization Email - optional**

2. Add or delete delegates who can file and serve on your behalf. To add, enter the delegate's User ID in the Add User ID field and select the **Add** button. To delete, select a User ID in the Delegates textbox and then select the **Delete** button. Only users with a Type of Filer role of Attorney can add or remove delegates.
3. Enable the clerk to modify your filing fees by checking the **Allow the Clerk to Modify** checkbox.
    - Changes made by the clerk may cause the cost of the filing to go up or down. If you do not select this option and the filing fees need to be changed, the Clerk may reject the filing.
4. Read the User Account Agreement and, if you agree, check the box next to **I have read and understand this Agreement.** Doing so is equivalent to signing a paper contract.
    - Print the User Account Agreement by selecting the **Print a Copy** link. The agreement appears in a new window formatted for printing. Select **Print Agreement** to print the agreement.
5. Select the **Submit** button to update your account information.
    - Any errors discovered by the program are listed at the top of the page. Correct these errors and then select the **Submit** button.

Editing Billing Information

The Edit Billing Information section allows you to store non-confidential payment information for a credit card or for electronic check (ACH). This information will be pre-populated when you submit a filing or service.

You can perform the following actions:

Store credit card billing information

1. Select Credit Card as the payment type.
2. Enter the following information:
    - **Billing Name** (required) Enter the name of the account holder. Acceptable characters include: letters, numbers, spaces, single quote (‘), comma (,), hyphen (-), period (.).
    - **Address Line 1** (required) Enter the mailing address of the account holder. Acceptable characters include: letters, numbers, space, sharp sign (#), single quote (‘), comma (,), hyphen (-), period (.).
    - **City** (required)
    - **State** (required)
    - **Zip Code** (required) Valid formats are 55555 or 55555-5555.
    - **Credit Card Type** (required)
        - Visa
        - Discover
        - MasterCard
        - American Express
            - Enter Credit Card Number - enter the card number with no spaces or dashes
            - Enter Expiration Date
3. Select to display this billing information each time you file or serve by checking the **Make the payment type chosen above my default** checkbox.
4. Press the **Submit** button to update your profile.

Store ACH billing information

1. Select ACH as the payment type.
2. Enter the following information:
    - **Billing Name** (required) Enter the name of the account holder. Acceptable characters include: letters, numbers, space, single quote (‘), comma (,), hyphen (-), period (.).
    - **Account Type** (required) Enter the type of bank account from which funds will be withdrawn.
3. Select to display this billing information each time you file or serve by checking the **Make the payment type chosen above my default** checkbox.
4. Press the **Submit** button to update your profile.

Editing Your eService Profile

The eService Profile allows you to grant global or case-by-case permission for other attorneys to serve you copies electronically.

You can perform the following actions:

Enabling Global eService

1. Check the **Global eService Opt-in** checkbox to grant permission for other attorneys to serve you electronically in any case.
2. Select the **Save Profile** button to save your changes.

Enabling Case-by-case eService

1. Un-check the **Global eService Opt-in** checkbox if it is already checked.
2. In the Select Cases for eService section, enter the following information to identify in which case you want to be served electronically.
    - **Jurisdiction** (required)
    - **Court/Calendar** (required)
    - **Case/Cause Number** (required)
3. Select the **Add Case** button and repeat step #2 above to add more cases to your list.
4. Select the **Save Profile** button to save your changes.

Disabling eService on a Case

1. In the Currently Selected Cases section, select the **Remove** button to the right of the case for which you want to disable electronic service.
2. Select the **OK** button to tell the system you are sure you want to remove the case.
3. Select the **Save Profile** button to save your changes.

Resetting Your Password

If you have forgotten your password follow the steps below to have the system email you a temporary password.

1. Enter the following information exactly as it appears in your user account:
    - **User ID** (required)
    - **Email Address** (required)
    - **Location** (required)
2. Select the **Submit** button and a temporary password will be sent to the email address associated with your account. It will include instructions for logging in and updating your temporary password.

Retrieving your User ID

If you have forgotten your User ID follow the steps below to have the system send you an email containing your User ID.

1. Enter the following information exactly as it appears in your user account:
    - **Last Name** (required)
    - **First Name** (required)
    - **Email Address** (required)
    - **Location** (required)
2. Click the **Submit** button and your User ID will be sent to the email address associated with your account.

Document Queue

Document Queue

The Document Queue allows you to upload documents to a temporary storage area so when you are ready to file or serve, you can quickly add the uploaded document(s) to the filing or service.

Upload a Document

1. Select the **Upload** button. A pop-up box will appear to allow you to upload your document. . (If the pop up box doesn't appear - disable your pop up blocker or chose the option to "always allow from this site. If your pop up blocker is already disabled and the pop up box still doesn't appear, minimize your MyFileRunner page and see if you computer placed the pop up box behind the MyFileRunner page. If you have multiple pages open, check to make sure the pop up box isn't hiding behind those pages.)

2. Select the **Browse** button to find and select a file on your computer. Ensure your file meets the following criteria:
   - The document name and the name of the folder it resides in must not contain an apostrophe. If it does, please rename it without the apostrophe before trying to upload.
   - The document is under 4 MB in size.
   - You do not already have a file with the same file name in your Document Queue.
   - The document is one of the following supported file formats:
     - Microsoft Word (.doc)
     - WordPerfect (.wpd) (must be version 8.0 or later)
     - ASCII (.txt)
     - Adobe Portable Document Format (.pdf)
     - Rich Text Format (.rtf)
3. Enter Description
4. Select the **Upload** button. After the document has been uploaded you will see the Document Queue with each uploaded document and its conversion status. Your document may take some time to process; select the **Refresh** button to see if the document status has changed.
   - Document statuses include:
     - **Processing**. The system is virus-scanning and converting your document to PDF.
     - **Ready.** The document is ready to be attached. To view the document, select the **View** link. To edit the description, select the **Edit** link.
     - **Failed Virus Scan**. The system found a virus in your document and did not upload the document to the queue.
     - **Failed Conversion**. The system could not convert your document to PDF.

Note: If you have pop-up blocker installed on your computer you will not be able to upload documents to the document queue. You will need to disable pop-up blocker in order to continue.

Edit description for a document

1. Select the Edit link next to the document filename. A pop-up box will appear to allow you to edit your description.
2. Edit your description and click the **Update** button.

Delete a document

1. Select the **Delete** link next to the document filename. A confirmation box will appear.
2. Click the **OK** button.

Sort the Document Queue

eService Plus

eService Plus allows you to submit service to another attorney without filing the documents with the clerk.

When you select eService Plus from the Main Menu, a list of submission steps appears in the menu on the left side of the page. You must complete each step before proceeding to the next step. Use the **Back** button or the **Next** button to go back or forward one step. Use the menu on the left side of the screen to quickly revisit any step you have already completed.

You must disable any pop-up blocker on your system in order to successfully use eService Plus.

Case Information

1. Enter the following case information:
    - **Filing Attorney** (required) The attorney in whose name the service is served.
    - **Role** (required) The role of the filing attorney.
    - **Jurisdiction** (required) The county and court type where the case is filed.
    - **Court/Calendar** (required) The court that is hearing the case.
    - **Case/Cause Number** (required) Enter the case/case number carefully. Some jurisdictions check to ensure this is a valid case/cause number pattern.
    - **Import Case Data From** (required) State the source of data used to pre-populate the service.
        - **EFiling for Courts** This option will pre-populate the style/case name and service list with the data that is available from eFiling for Courts.
        - **My Case Data** This option will pre-populate the style/case name, client matter number and service list that you have saved previously when submitting a filing or service on this case using this service provider.
        - **Filing Attorney Case Data** This option will pre-populate the style/case name, client matter number and service list that the Filing Attorney has saved previously when submitting a filing or service on this case using this service provider. This option is available only to a delegate.
2. Select the **Next** button.

Service Data

1. Enter the following information about the service:
    - **Style/Case Name** (required) The name of the case.
    - **Client Matter Number** This value is for your internal use only and will not be distributed to other Attorneys. Acceptable characters include: letters, numbers, spaces, double quote (“), sharp sign (#), ampersand (&), single quote (‘), parentheses (( ), ( )), comma (,), hyphen (-), period (.), forward slash (/), backward slash (\), colon (:), semicolon (;), at sign (@), underscore (_).
    - **Service Description** (required) Description of the served documents.
2. Select the **Next** button.

Service List/Case Attorneys

This step displays a Service List, which is a list of attorneys that you can save and reuse for any filing or service on that case. Any attorney in the list with a Delivery Type of Electronic will be served electronically when you submit.

To add a registered attorney to your Service List, select the **Registered** button. A Registered Attorney is an attorney who has registered to eFile. (See Search for a Registered Attorney).

To add an unregistered attorney to your Service List, select the **Unregistered** button. An Unregistered Attorney is an attorney who has not registered to eFile. If an Unregistered Attorney in your list later registers and agrees to use eService, you will need to add them as a registered attorney before you can serve them electronically. (See Add an Unregistered Attorney).

Select the **Edit** link next to an attorney to edit information about that attorney. (See Edit a Registered Attorney or Edit an Unregistered Attorney)

Select the **Delete** link next to an attorney to remove them from the Service List.

Searching for a Registered Attorney

A Registered Attorney is an attorney who has registered to eFile. To search for a registered attorney follow the steps below:

1. Enter at least one of the following fields describing the attorney you want to find:
    - **First Name**
    - **Last Name**
    - **Firm/Organization Name**
    - **Bar Number**
    - **Bar State** (required. If you are searching for a Pro Se filer enter their Drivers License State in this field.
2. Select the **Search** button.

Adding Registered Attorneys to the Service List

Add an attorney to your Service List by following the steps below.

1. Check the **Select** checkbox beside each attorney that you want to add to your Service List.
2. For each attorney you are adding enter:
    - **Representation** (required if no Delivery Type entered) The role of the attorney in the case.
    - **Service Delivery Type** (required if no Representation entered) The Delivery Type by which you intend to deliver service to the attorney.
        - **Electronic** – The attorney will be served electronically and will appear in the Proof of Service document. This option will only be available if the attorney is registered for eFiling and has given permission to be served electronically.
        - **Fax, Mail, or Courier** – The attorney and the way you have chosen to service him/her will appear in the Proof of Service document.
        - **None** – The attorney will neither be served nor appear in the Proof of Service document.
    - **Invite** Select the Invite checkbox to invite an attorney to participate in eService on this case in the future. If this attorney was previously invited to this case, you will not be able to invite the attorney.
3. Select the **Attach Selected** button to add the attorney(s) to the Service List.

Add an Unregistered Attorney

Add an attorney to your Service List by following the steps below.

1. Enter the following information about the attorney.
    - **First Name** (required) Acceptable characters include: letters, numbers, spaces, single quote ('), comma (,), hyphen (-), period (.).
    - **Middle Initial**
    - **Last Name** (required) Acceptable characters include: letters, numbers, spaces, single quote ('), comma (,), hyphen (-), period (.).
    - **Representation** (required if you do not enter a Delivery Type) The role of the attorney in the case.
    - **Delivery Type** (required if you do not enter a Representation) The method by which the service will be delivered to the attorney.
    - **Fax, Mail, or Courier** – The attorney and the way you have chosen to service him/her will appear in the Proof of Service document.
    - **None** – The attorney will not appear in the Proof of Service document.
    - **Email Address** (required if you select Invite) The Email Address of the attorney.
    - **Confirm Email Address** (required if you entered Email Address) Confirm that you have entered the correct Email Address by entering the same data you entered in the Email Address field.
2. Select the **Invite** checkbox to invite the attorney to register for eFiling and to be served electronically in the future. You will not be able to use the Invite checkbox if someone has already invited the attorney to register for eFiling.
3. Select the **Add** button to add the attorney to your Service List.

Editing a Registered Attorney

The Edit a Registered Attorney section allows you to edit information about an attorney in your Service List.

1. Edit the following information about the attorney:
    - **Representation** (required if no Delivery Type entered) The role of the attorney in the case.
    - **Service Delivery Type** (required if no Representation entered) The Delivery Type by which you intend to deliver service to the attorney.
    - **Electronic** – The attorney will be served electronically and will appear in the Proof of Service document. This option will only be available if the attorney is registered for eFiling and has given permission to be served electronically.
    - **Fax, Mail, or Courier** – The attorney and the way you have chosen to service him/her will appear in the Proof of Service document.
    - **None** – The attorney will not be served nor appear in the Proof of Service document.
    - **Invite** Select the Invite checkbox to invite an attorney to participate in eService on this case in the future. If this attorney was previously invited to this case, you will not be able to invite the attorney.
2. Select the **Update** button to accept the changes.

Editing an Unregistered Attorney

The Edit an Unregistered Attorney section allows you to edit information about an unregistered attorney in your Service List.

1. Edit the following information about the attorney:
    - **First Name** (required) Acceptable characters include: letters, numbers, spaces, single quote (‘), comma (,), hyphen (-), period (.).
    - **Middle Initial**
    - **Last Name** (required) Acceptable characters include: letters, numbers, spaces, single quote (‘), comma (,), hyphen (-), period (.).
    - **Representation** (required if no Delivery Type entered) The role of the attorney in the case.□ □ □
    - **Service Delivery Type** (required if no Representation entered) The Delivery Type by which you intend to deliver service to the attorney.
    - **Fax, Mail, or Courier** – The attorney and the way you have chosen to service him/her will appear in the Proof of Service document.
    - **None** – The attorney will not appear in the Proof of Service document.
    - **Invite** Select the Invite checkbox to invite an attorney to participate in eService on this case in the future. If this attorney was previously invited to this case, you will not be able to invite the attorney.
2. Select the **Update** button to accept the changes.

Payment Information

1. Select a payment type.
2. Enter the following billing information.
    - **Billing Name** (required for credit card) Enter the name of the account holder. Acceptable characters include: letters, numbers, spaces, single quote (‘), comma (,), hyphen (-), period (.).
    - If you selected to pay by credit card:
        - **Address 1** (required for credit card) Enter the mailing address of the account holder. Acceptable characters include: letters, numbers, spaces, sharp sign (#), single quote (‘), comma (,), hyphen (-), period (.).
        - **City** (required for credit card) Acceptable characters include: letters, numbers, spaces, single quote (‘), comma (,), hyphen (-), period (.).
        - **State** (required for credit card)
        - **Zip Code** (required for credit card) Use the format 55555 or 55555-5555.
        - **Credit Card Number** (required)
        - **Expiration Date** (required)
    - If you selected to pay by ACH:
        - **Account Number** (required)
        - **Routing Number** (required)

3. Select save profile options (optional).

    - **Update recent changes to my saved profile**. Select this if you want to save changes to the non-confidential payment information you have entered.
    - **Make the payment type chosen above my default**. Select this to always display this payment information entered for later transactions.

4. Select the **Next** button.

Note: See Edit Billing Information for additional information on how to store non-confidential billing information.

Attach Documents

You must add a document to the service before you can submit. If you have used the Document Queue to upload the documents for this filing, you can skip directly to Add a Document. Otherwise you will first need to upload a document.

To remove a document from the filing, select the **Delete** link next to a document and select the **OK** button to confirm that you want to remove the document from the filing.

Upload a Document

1. Select the **Upload Document** button.
2. Select the **Browse** button to find and select a file on your computer. Ensure your file meets the criteria below:
    - The document is under 4 MB in size.
    - You do not already have a file with the same file name in your Document Queue.
    - The document is in one of the following supported file formats:
        - Microsoft Word (.doc)
        - WordPerfect (.wpd) (must be version 8.0 or later)
        - ASCII (.txt)
        - Adobe Portable Document Format (.pdf)
        - Rich Text Format (.rtf)
3. Enter Comments (optional).
4. Select the **Upload** button and your document will be virus-scanned and converted to PDF. Your document may take some time to process.

Add a Document

1. Select the **Attach Document** button.
2. Select the checkbox next to the document you want to add and then select the **OK** button.
    - You may only add a document that is in Ready status, select the **Refresh** button to see if the document status has changed. (See Document Queue to view descriptions of each document status). To view the document before adding it to the filing, select the **View** link next to the document.
3. Enter the following information about the document.
    - **Document Name** The jurisdiction-defined document category.
    - **Description** Your description of the document.

Verifying a Document

1. Select the **View** link at the right side of the document to verify the document(s) was successfully converted to PDF.
2. Select the **I have Verified that all Files have been Converted Correctly** checkbox.
3. **Delete Documents from Document Queue on Successful Submission.** Select this if you would like the system to delete your documents from the document queue upon submission.
4. Select the **Next** button.

Note: If you have pop-up blocker installed on your computer you will not be able to upload documents to the document queue. You will need to disable pop-up blocker in order to continue.

Summary/Submit

Review all the information about the service. Correct any errors by using the **Back** button or use the menu on the left side of the screen to quickly revisit any step you have already completed.

If you don't want to save your data for additional filings or service on this case, deselect the **Save Attorneys to My Case Information** checkbox.

To submit your service, select the **Submit** button

If you do not wish to submit the service, select the **Cancel** button. You will lose all data associated with the service.

Confirmation

The Confirmation section confirms that your service was successfully submitted. The Serving Party will receive a Proof of Service document by email. You can track the status of the service you sent in your eService Report (see eService Report). It is important that you keep a copy of the trace number shown on this page since this is the unique identifier to track your transaction.

To get a printable version of the confirmation page, select the **Printer-friendly** link.

Rejected Stand Alone eService Submission

Please check to ensure that your credit card number is valid. Chose the **Click Here** link to re-enter your payment information.

Submitting A Filing

Overview of Submit a Filing

Submit Filing allows you to submit a filing to the clerk. You can also electronically serve copies of the filing to other attorneys. When you select Submit Filing from the Main Menu, a list of submission steps appears in the menu on the left side of the page.

You must complete each step before proceeding to the next step. Use the **Back** button or the **Next** button to go back or forward one step. Use the menu on the left side of the screen to quickly revisit any step you have already completed.

You must disable any pop-up blocker on your system or choose always allow from this site in order to successfully submit a filing.

Jurisdiction

1. Enter the following information:
    - **Filing Attorney** (required) The attorney in whose name the filing is being filed.
    - **Role** (required) The role of the filing attorney.
    - **Jurisdiction** (required) The county and court type where the filing is being filed.
    - **Original Petition** (required) Select Yes if this is a new case without a case/cause number. Select No if this is a subsequent filing in a case that already has a case/cause number. If you select No, the following additional fields will appear:
        - o **Case/Cause Number** (required) Enter the case/case number carefully. Some jurisdictions check to ensure this is a valid case/cause number pattern.
        - o **Court/Calendar** (required) The court that the filing is being filed in.
        - o **Import Case Data From** (required) State the source of data used to pre-populate the filing.
            - **EFiling for Courts** This option will pre-populate the style/case name, service list and parties list that is available from eFiling for Courts.
            - **My Case Data** This option will pre-populate the style/case name, client matter number, service list and parties list that you have saved previously when submitting a filing or service on this case using this service provider.
            - **Filing Attorney Case Data** This option will pre-populate the style/case name, client matter number, service list and parties list that the Filing Attorney has saved previously when submitting a filing or service on this case using this service provider. This option is available only to a delegate.
2. Select the **Next** button.

Filing

1. Enter the following information about the filing.
   - **Filing Type** (required) The category of the filing as defined by the jurisdiction.
   - **Style/Case Name** (required) The name of the case.
   - **Sealed Document** Check the box if the filing contains a sealed document**.**
   - **Client Matter Number** (required) This value is for your internal use only and will not be distributed to Clerks or other Attorneys. Acceptable characters include: letters, numbers, spaces, double quote ("), sharp sign (#), ampersand (&), single quote ('), parentheses (( ), ( )), comma (,), hyphen (-), period (.), forward slash (/), backward slash (\), colon (:), semicolon (;), at sign (@), underscore (_).
   - **Special Instructions** Enter any special instructions that you would like to pass along to the clerk.
2. Select any miscellaneous services that you need, along with any values associated with that service. If you have citations to order, most jurisdictions require you to enter the number of citations requested on this section. In most cases, you will also need to add the service copies.
3. Select the **Next** button.

Note: You may see a text box at the top of the screen stating, "No data was found for the Method of Pre-population you selected." You can select the **Back** button to return to the Jurisdiction page and try a different option to import case data from or continue without pre-population.

Service

This step displays a Service List, which is a list of attorneys that you can save and reuse for any filing or service on that case. Any attorney in the list with a Delivery Type of Electronic will be served electronically when you submit.

To add a registered attorney to your Service List, select the **Registered** button. A Registered Attorney is an attorney who has registered to eFile. (See Search for a Registered Attorney).

To add an unregistered attorney to your Service List, select the **Unregistered** button. An Unregistered Attorney is an attorney who has not registered to eFile. If an Unregistered Attorney in your list later registers and agrees to use eService, you will need to add them as a registered attorney before you can serve them electronically. (See Add an Unregistered Attorney).

Select the **Edit** link next to an attorney to edit information about that attorney. (See Edit a Registered Attorney or Edit an Unregistered Attorney)

Select the **Delete** link next to an attorney to remove them from the Service List.

Search for a Registered Attorneys

A Registered Attorney is an attorney who has registered to eFile. To search for a registered attorney follow the steps below:

1. Enter one or more of the following fields describing the attorney you want to find:
    - **First Name**
    - **Last Name**
    - **Firm/Organization Name**
    - **Bar Number:** It's always best to search on the bar# alone as it will pull the most accurate results
    - **Bar State** (required). If you are searching for a Pro Se filer enter their Drivers Licence State in this field.
2. Select the **Search** button.

Add Registered Attorneys to the Service List

Add an attorney to your Service List by following the steps below. The Delivery drop-down list will not appear if you are submitting an Original Petition.

1. Check the **Select** checkbox beside each attorney that you want to add to your Service List.

- For each attorney you are adding:
- **Representation** (required if no Delivery Type entered) The role of the attorney in the case.
- **Service Delivery Type** (required if no Representation entered) The Delivery Type by which you intend to deliver service to the attorney.
    - **Electronic** – The attorney will be served electronically and will appear in the Proof of Service document. This option will only be available if the attorney is registered for eFiling and has given permission to be served electronically.
    - **Fax, Mail, or Courier** – The attorney and the way you have chosen to service him/her will appear in the Proof of Service document.
    - **None** – The attorney will neither be served nor appear in the Proof of Service document.
- **Invite** Select the Invite checkbox to invite an attorney to participate in eService on this case in the future. If this attorney was previously invited to this case, you will not be able to invite the attorney.

3. Select the **Next** button to add the attorney(s) to the Service List.

Add an Unregistered Attorney

Add an attorney to your Service List by following the steps below. The **Delivery Type** drop-down list will not appear for an Original Petition.

1. Enter the following information about the attorney.
    - **First Name** (required) Acceptable characters include: letters, numbers, spaces, single quote ('), comma (,), hyphen (-), period (.).
    - **Middle Initial**
    - **Last Name** (required) Acceptable characters include: letters, numbers, spaces, single quote ('), comma (,), hyphen (-), period (.).
    - **Representation** (required if you do not enter a Delivery Type) The role of the attorney in the case.
    - **Delivery Type** (required if you do not enter a Representation) The method by which the service will be delivered to the attorney.

    - **Fax, Mail, or Courier** – The attorney and the way you have chosen to service him/her will appear in the Proof of Service document.
    - **None** – The attorney will not appear in the Proof of Service document.
  - **Email Address** (required if you select Invite) The Email Address of the attorney.
  - **Confirm Email Address** (required if you entered Email Address) Confirm that you have entered the correct Email Address by entering the same data you entered in the Email Address field.
2. Select the **Invite** checkbox to invite the attorney to register for eFiling and be served electronically in the future. You will not be able to use the Invite checkbox if someone has already invited the attorney to register for eFiling.
3. Select the **Add** button to add the attorney to your Service List.

Editing an Unregistered Attorney

The Edit an Unregistered Attorney section allows you to edit information about an unregistered attorney in your Service List. If you are submitting an Original Petition the Delivery Type field will not be visible.

1. Edit the following information about the attorney:
   - **First Name** (required) Acceptable characters include: letters, numbers, spaces, single quote ('), comma (,), hyphen (-), period (.).
   - **Middle Initial**
   - **Last Name** (required) Acceptable characters include: letters, numbers, spaces, single quote ('), comma (,), hyphen (-), period (.).
   - **Representation** (required if no Delivery Type entered) The role of the attorney in the case.
   - **Service Delivery Type** (required if no Representation entered) The Delivery Type by which you intend to deliver service to the attorney.
     - **Fax, Mail, or Courier** – The attorney and the way you have chosen to service him/her will appear in the Proof of Service document.
     - **None** – The attorney will not appear in the Proof of Service document.
   - **Invite** Select the Invite checkbox to invite an attorney to participate in eService on this case in the future. If this attorney was previously invited to this case, you will not be able to invite the attorney.
2. Select the **Update** button to accept the changes.

Party Information

This step displays a Party List, which is a list of the plaintiffs and defendants that you can save and reuse for any filing or service on that case.

To add a case party to your Party List, select the **Add Case Party** button. To edit a case party in your Party List, select a party's name, or the **Edit** link next to a party. (See Add or Edit a Case Party)

To delete a case party in your Party List, select the **Delete** link next to the party's name and confirm the deletion by clicking the **OK** button.

Add or Edit a Case Party

1. Enter the following information about the Case Party.
    - **First Name** (required if Company is not entered) Acceptable characters include: letters, numbers, spaces, single quote ('), comma (,), hyphen (-), period (.).
    - **Middle Initial**
    - **Last Name** (required if Company is not entered) Acceptable characters include: letters, numbers, spaces, single quote ('), comma (,), hyphen (-), period (.).
    - **Company** (required if First Name and Last Name is not entered) Acceptable characters include: letters, numbers, spaces, comma, period, apostrophe ('), hyphen (-), colon (:), semicolon (;), quotes ("), parentheses ("(" and ")"), ampersand (&) and at sign (@).
    - **Role** (required) Select the role of the party in the case.
    - **Representation** Enter the name of the attorney representing the party.
    - **Service Type** Select type of service from the Jurisdiction defined list.
    - **Delivery Method** Select the method by which the service is delivered from the list the Jurisdiction defined.
    - **Service Description** Enter instructions or other information about the service of process.
    - **Address Line 1** (required if Delivery Method is selected) Acceptable characters include: letters, numbers, spaces, sharp sign (#), single quote ('), comma (,), hyphen (-), period (.).
    - **Address Line 2**
    - **City** (required if Delivery Method is selected) Acceptable characters include: letters, numbers, spaces, single quote ('), comma (,), hyphen (-), period (.).
    - **State** (required if Delivery Method is selected)
    - **Zip Code** (required if Delivery Method is selected) Use the format 55555 or 55555-5555.
2. Select the **Next** button to add the party.

Payment Information

Note: If you have corporate billing or if billing information is stored in the attorney's account - this section will not appear.

1. Select a payment type. Only the payment types the jurisdiction accepts will be available.
2. Enter the following billing information.
    - **Billing Name** (required for credit card) Enter the name of the account holder. Acceptable characters include: letters, numbers, spaces, single quote (‘), comma (,), hyphen (-), period (.).
    - If you selected to pay by credit card:
        - **Address 1** (required for credit card) Enter the mailing address of the account holder. Acceptable characters include: letters, numbers, spaces, sharp sign (#), single quote (‘), comma (,), hyphen (-), period (.).
        - **City** (required for credit card) Acceptable characters include: letters, numbers, spaces, single quote (‘), comma (,), hyphen (-), period (.).
        - **State** (required for credit card)
        - **Zip Code** (required for credit card) Use the format 55555 or 55555-5555.
        - **Credit Card Number** (required)
        - **Expiration Date** (required)
    - If you selected to pay by ACH:
        - **Account Number** (required)
        - **Routing Number** (required)
3. Select save profile options (optional).
    - **Update recent changes to my saved profile**. Select this if you want to save changes to the non-confidential payment information you have entered.
    - **Make the payment type chosen above my default**. Select this to always display this payment information entered for later transactions.
4. Select the **Next** button.

Note: See Edit Billing Information for additional information on how to store non-confidential billing information.

Attach Documents

You must add a lead document to the filing before you can submit. If you have used the Document Queue to upload the documents for this filing, you can skip directly to Adding the Lead Document. If you have not, then you will need to upload a document.

To remove a document from the filing, select the **Delete** link next to a document and select the **OK** button to confirm that you want to remove the document from the filing.

Upload a Document

1. Select the **Upload Document** button.
2. Select the **Browse** button to find and select a file on your computer.

   Ensure your file meets the criteria below:

   - Neither the document name nor the folder it is located in may contain an apostrophe. If it does, please rename the document/folder without the apostrophe.
   - The document is under 4 MB in size.
   - You do not already have a file with the same file name in your Document Queue.
   - The document is in one of the following supported file formats:
     - Microsoft Word (.doc)
     - WordPerfect (.wpd) (must be version 8.0 or later)
     - ASCII (.txt)
     - Adobe Portable Document Format (.pdf)
     - Rich Text Format (.rtf)
3. Enter a description (optional).
4. Select the **Upload** button and your document will be virus-scanned and converted to PDF. Your document may take some time to process.

Adding the Lead Document: **This is the document you want to receive a file stamp on. Orders must not be submitted as a lead.**

1. Select the **Add Lead** button.
2. Select the checkbox next to the document you want to add as the Lead Document and then select the **OK** button.
   - You may only add a document that is in Ready status, select the **Refresh** button to see if the document status has changed. (See Document Queue to view descriptions of each document status). To view the document before adding it to the filing, select the **View** link next to the document.
3. Enter the following information about the document:
   - **Document Name** The jurisdiction-defined document category.
   - **Description** Your description of the document. If you did not enter the description during the upload document step, you must enter it now.

Adding Attachments

NOTE: Only the lead document will receive a file stamp. Your Attach Document is only for items such as correspondence, exhibits, and orders

1. Select the **Add Attachments** button.
2. Select the checkbox next to each document you want to add to the filing and then select the **OK** button.
    - You may only add a document that is in Ready status, select the **Refresh** button to see if the document status has changed. (See Document Queue to view descriptions of each document status). To view the document before adding it to the filing, select the **View** link next to the document
3. Enter the following information about the document:
    - **Document Name** The jurisdiction-defined document category.
    - **Description** Your description of the document.

Verifying a Document

1. Select the **View** link at the right side of the document to verify the document(s) was successfully converted to PDF.
2. Select the **I have Verified that all Files have been Correctly Converted** checkbox.
3. **Delete Documents from the Document Queue on Successful Submission.** Select this if you would like the system to delete your documents from the document queue upon submission
4. Select the **Next** button.

Edit Filing Attorney Information

You may update the Filing Attorney contact information for the current filing only. The Filing Attorney must update his/her account profile to make the changes permanent.

1. Edit the following information:
    - **Law Firm or Organization** (required) Acceptable characters include letters, numbers, spaces, commas, periods, apostrophes (‘), hyphens (-), colons (:), semicolons (;), quotes (“), parentheses (“(“ and “)”), ampersands (&) and at signs (@).
    - **Address Line 1** (required) Acceptable characters include: letters, numbers, spaces, sharp sign (#), single quote (‘), comma (,), hyphen (-), period (.).
    - **Address Line 2**
    - **City** (required) Acceptable characters include: letters, numbers, spaces, single quote (‘), comma (,), hyphen (-), period (.).
    - **State** (required)
    - **Zip Code** (required) Use the format 55555 or 55555-5555.
    - **Phone** (required) Use the format 555-555-5555.
    - **Fax Number** (required) Use the format 555-555-5555.
2. Select the **Next** button to accept changes.

Submit the Filing

Review all the information about the filing. Correct any errors by using the **Back** button or use the menu on the left side of the screen to quickly revisit any step you have already completed.

If you don't want to save your data for additional filings or service on this case, deselect the **Save to Case Data** checkbox.

To edit personal information about the Filing Attorney, select the **Edit** button (See Edit Filing Attorney Information).

To submit your filing to the court, select the **Submit Filing** button

If you do not wish to submit the filing, select the **Cancel Filing** button and you will lose all data associated with the filing.

Confirmation

The Confirmation section confirms that your filling was successfully submitted. Both the Filer and the Filing Attorney will receive an email acknowledgement that the filing has been successfully submitted to the court. It is important that you keep a copy of the trace number shown on this page since this is the unique identifier to track your transaction.

To get a printable version of the confirmation page, select the **click here** link.

If you have additional documents to file, select the **Submit Another Filing** button.

Rejected Filing

Please check to ensure that your credit card number is valid. Chose the **Click Here** link to re-enter your payment information. Or chose the **Continue With Your Submission** link to continue the filing submission without revising your payment information.

Reviewing eFiling/eService

Overview of Review Filings/ eService

The Review Filings/eService section provides information on documents you have filed, served, or been served. When you select Review Filings/eService from the Main Menu, three options appear in the menu to the left of the screen.

Review Filings/eService	Overview
[Filing Inbox]()	Use your Filing Inbox to view the submission status and details of filings you have submitted to the clerk.
[EService Inbox]()	Use your eService Inbox to view the service sent to you by other attorneys.
[EService Report]()	Use your eService Report to view details of service you have sent to other attorneys, including the status of their service.

Filings and service will only be available for a limited period of time. Check with your customer support representative for more information.

Filing Inbox

Use the Filing Inbox to find and view filings that you or your delegates have submitted to the clerk. Select the filing's Trace Number to review the filing details, including links to the documents.

Sorting the Inbox

To sort by a column header, click on that column header. Clicking the column header a second time reverses the order of the sort. By default, the Filing Inbox is initially sorted by Status Date/Time from most recent to oldest. Filing information is removed from the Filing Inbox after a certain time period. Check with your customer support representative for details.

Filing Inbox Column Headers

- **Trace Number** A unique identifier assigned by eFiling for Courts.
- **Case/Cause Number** The case/cause number assigned to the case.
- **Filing Type** The category of the filing as selected by the filer.
- **Jurisdiction** The county and court type where the filing was submitted.
- **Filing Status** The processing status of the filing. The following status values may appear in the Filing Inbox:
    - **Acknowledgement**: The filing has been received and is awaiting clerk review.
    - **Confirmation:** The filing has been reviewed and accepted by the clerk.
    - **Alert:** The filing has been reviewed and rejected by the clerk.
- **Status Date/Time** The last time that the Filing Status was updated.

Viewing More Filings

If there are more filings in the Inbox than will fit on one screen, the text **Next** **10** **25** **50** will appear above the Cause Number column. Select **10**, **25**, or **50** to see the next 10, 25, or 50 filings. The **<<**, **<**, **>**, and **>>** symbols appear above the Filing Status column. Select **<<** to view the first page of filings, **<** to view the previous page of filings, **>** to view the next page of filings, and **>>** to view the last page of filings.

Note: Select the **Jurisdiction Information** to see information about a given jurisdiction.

Searching for a Filing

1. Enter one or more of the following values:
    - **Trace Number**
    - **Case/Cause Number**
    - **Jurisdiction**
    - **Filing Type**
    - **Filing Status** You may pick from the following status values:
        - **Acknowledgement**
        - **Confirmation**
        - **Alert**
    - **Date Range From** and **Date Range To** Enter a date range for the filing(s) by Status Date/Time.
2. Select the **Search** button and any records found will be displayed in the Filing Inbox.

Filing Inbox Details

The Filing Inbox Details section allows you to view all the information about the filing and to see the current status and if any changes were made by the Clerk. You can also view the filing as it was submitted by selecting the **View Original Filing** link.

You can perform the following actions:

- **Printing the Filing Data**

  To get a printable version of the filing data, select the Printer-friendly link. You will see the data displayed in a separate window in a printer-friendly format. Select File and then select Print. Select a printer, then select the Print or OK button.

- **Viewing and Printing a Document**

  1. Select the Lead Document Name or the Attachment File Name of the document you want to view. If the Lead Document Name or Attachment File Name of the document you want to view is not hyperlinked, then the document is no longer available.

  2. You will see the document in a separate window. Select **File** and then select **Print**. Select a printer, then select the **Print** or **OK** button.

eService Inbox

The eService Inbox section allows you to find and retrieve service sent to you or the attorney you are a delegate for. The first time that either party selects to retrieve a service by selecting the case/cause number, the service status changes to “Retrieved” and the serving party is notified. To see if new service has arrived select the **Refresh Data from eFiling for Courts** link. Service information is removed from the eService Inbox after a certain time period. Check with your customer support representative for details.

Sorting the Inbox

Sort the eService Inbox by clicking on any column header. Clicking the column header a second time reverses the order of the sort. By default, the eService Inbox is initially sorted by Service Status Date/Time from most recent to oldest.

eService Inbox Column Headers

- **Jurisdiction** The county and court type where the case was filed.
- **Court/Calendar** The court where the case was filed.
- **Case/Cause Number** The case/cause number assigned to the case.
- **Serving Party** Name of the attorney sending the service.
- **Service Status** The processing status of the service. The following status values may appear in the Inbox:
  - **Notified**: The recipient has been notified of the service.
  - **Retrieved:** The service has been retrieved by the attorney or their delegate.
  - **Expired:** The service was not retrieved within a specified time frame.
- **Status Date/Time** The date and time when Service Status last changed.
- **Receiving Party** The attorney to whom the documents were served.

View More Services

If there are more filings in the Inbox than will fit on one screen, the text **Next 10 25 50** will appear above the Cause Number column. Select **10**, **25**, or **50** to see the next 10, 25, or 50 filings. The **<<**, **<**, **>**, and **>>** symbols appear above the Filing Status column. Select **<<** to view the first page of filings, **<** to view the previous page of filings, **>** to view the next page of filings, and **>>** to view the last page of filings.

eService Inbox Details

The eService Inbox Details displays the details of the filing you selected with links to the documents. When you display the Service details, the Service Status changes to “Retrieved”, and the Serving Party receives confirmation that you have retrieved this Electronic Service.

Viewing and Printing a Document

1. Select the Lead Document Name or the Attachment File Name of the document you want to view. If the Lead Document Name or Attachment File Name of the document you want to view is not hyperlinked, then the document is no longer available.
2. You will see the document in a separate window. Select **File** and then select **Print**. Select a printer, then select the **Print** or **OK** button.

Viewing eService Report

eService Report

Use your eService Report to view what has been served to other attorneys. Select the Trace Number of a service to view who was served and the status of the service. Select the **Refresh Data from eFiling for Courts** link to see if new services have arrived. Service information is removed from the eService Report after a certain time period. Check with your customer support representative for details.

Sorting a Report

Sort the eService Report by clicking any column header. Clicking the column header a second time reverses the order of the sort. By default, the eService Inbox is initially sorted by Process Date/Time from most recent to oldest.

eService Report Column Headers

- **Trace Number** The unique identifier used for tracking.
- **Jurisdiction** The county and court type where the case was filed.
- **Court/Calendar** The court where the case was filed.
- **Case/Cause Number** The case/cause number assigned to the case.
- **Serving Party** The name of the attorney sending the service.
- **Process Date** The date that the service was sent to the Receiving Party.

Viewing More Reports

If there are more filings in the Inbox than will fit on one screen, the text **Next 10 25 50** will appear above the Cause Number column. Select **10**, **25**, or **50** to see the next 10, 25, or 50 filings. The **<<**, **<**, **>**, and **>>** symbols appear above the Filing Status column. Select **<<** to view the first page of filings, **<** to view the previous page of filings, **>** to view the next page of filings, and **>>** to view the last page of filings.

eService Report Detail

The eService Report Detail section shows you the details of the selected service, with links to the documents if they are still available.

Service Status Definitions

- The **Service Status** field includes the following values:
- **Pending Notification:** The service was sent to the recipient's service provider. No response has been received indicating the provider has successfully notified the recipient.
- **Notified**: The service was sent to the recipient's service provider.
- **Retrieved:** The service has been retrieved by the party or by their delegate.
- **Expired:** The service has not been retrieved by the recipient within the specified time frame.
- **Failed:** The recipient's service provider never acknowledged that they received the service.

Viewing and Printing a Document

1. Select the Lead Document Name or the Attachment File Name of the document you want to view. If the Lead Document Name or Attachment File Name of the document you want to view is not hyperlinked, then the document is no longer available.
2. You will see the document in a separate window. Select **File** and then select **Print**. Select a printer, then select the **Print** or **OK** button.