



eFileTexas.gov™

Firm Administrator User Guide – Release 2017.1

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Contents

Copyright and Confidentiality	ii
Publishing History	ii
1 System Overview	1
Release 2017.1 New Features	1
Before You Begin	1
System Requirements	1
Page Navigation.....	1
Error Messages.....	3
2 E-Filing Overview	5
Filing Queue Status.....	5
3 eFileTexas.gov Home Page.....	8
4 eFileTexas.gov Registration	10
Registering as a New Firm.....	10
Registering as a User with an Existing Firm.....	15
Registering as an Independent User.....	17
Resetting Your Password.....	18
5 Login and Logout.....	20
Logging In	20
Logging Out.....	21
6 Case Search	22
Searching for a Case.....	22
Advanced Search	23
Performing an Advanced Search by Person	23
Performing an Advanced Search by Business	24
7 Firm Administrator Functions	26
Manage New Users.....	26
Filtering New Users Options	26
Approving and Rejecting New Users	27
Manage Firm User Accounts.....	27
Filtering Firm Users Options	27
Adding Firm User Accounts.....	28
Editing Firm User Accounts	30
Deleting Firm User Accounts	31
Resending Activation Email.....	31
Resetting User Passwords.....	32
Unlocking User Accounts	34
Manage Attorney Accounts	35
Adding Attorney Accounts	35
Editing Attorney Accounts	36
Deleting Attorney Accounts	37
Manage Payment Accounts	38
Adding Payment Accounts	38
Deactivating Payment Accounts	40
Editing Payment Accounts	40
Manage Firm Information.....	41
Updating Firm Information.....	41
8 Technical Support Contact Information	43



1 System Overview

Topics Covered in this Chapter

- ◆ Release 2017.1 New Features
- ◆ Before You Begin

This system enables registered users to file documents with the court anytime, anywhere, 24 hours a day, seven days a week. This highly automated, scalable system provides customers the opportunity to transition from an inefficient paper-based process to a streamlined technology-based electronic filing (e-filing) system.

Release 2017.1 New Features

There are no new Firm Administrator features for this release.

Before You Begin

This guide is intended for Firm Administrators.

Before you begin, review this information to successfully use the software.

Note: Depending on your setup, all features may not be available. As a result, your screen may vary from what is shown in this document.

System Requirements

The recommended system requirements to successfully use the system are as follows:

- **Browser Requirements** – The system supports current versions of the Microsoft® Windows® operating system using the Internet Explorer® 9 or above application program. If your browser does not meet these minimum requirements, please contact your network administrator.
- **Connection Requirements** – A high-speed Internet connection is recommended.
- **Minimum Screen Resolution** – For best results, a setting of 1024 x 768 or better is highly recommended. If necessary, users can set their monitors to 800 x 600 pixels, but doing so may compromise the graphic display.
- **Document Format** – The Adobe® PDF format is the only format allowed for attaching documents in eFileTexas.gov.

Page Navigation

The following sections describe how to navigate the system and populate data fields throughout the filing process.

Navigate with Breadcrumbs

Breadcrumbs are a visual representation of the page you are currently on in the filing process. As you complete a page, the title of the next page illuminates to show where you are in the process.

Note: Breadcrumb navigation requires information to be entered in a sequential order. You cannot move to the next breadcrumb until all of the required information on the current or previous page is completed.



Figure 1.1 – Breadcrumb Navigation

Populate the Data Table

The Data Table is populated using information that filers enter or select when they complete the forms throughout the filing process.

Party Type	Name	Attorney
Plaintiff	Jamie Gillespie	
Defendant	Bob Jones	
Trustee	April Smith	
Petitioner	Jackson Williams	

Figure 1.2 – Data Table


Enter User Information

The user information you enter or select populates the Data Table.

First Name* Amanda	Middle T.	Last Name* Watson
Email* awatson@ops.gov	Administrative Copy ⓘ info@yourfirm.com	Firm Name Madison-Green Law Firm
Country* United States of America		
Address Line 1* 998877 Legal Way		
City* Montgomery		
State* Vermont	Zip Code* 54433	
Phone 876-555-1212		
<input checked="" type="checkbox"/> Make this contact Public		

Figure 1.3 – Data Fields

Resume Filing

At any point in the filing process, the system automatically saves a draft of the page on which you have completed all required fields. This feature allows you to stop work on a filing and resume the filing at a later time. To resume filing of a saved draft, click [WORKSPACE](#), find your case on the *Filings* page, and click  to resume your filing.

The screenshot shows a web interface for 'FILINGS' with navigation tabs for 'BOOKMARKS', 'TEMPLATES', and 'SERVICE CONTACTS'. Below these are filters for 'My Firm', 'All Statuses', 'All Locations', and date ranges. The main content area displays three case entries, each with a table of filing details.

Status	Filing Code	Filing Type	Filing Description	Reference Number
Accepted	Judgment	EFileAndServe	Judg	EFS
Accepted	Affidavit and Order for Dismissal	EFile	Power of Atty	DJE 1/1
Rejected	Amended Petition	EFileAndServe	amended pet	1/3 EFS
Rejected	Notice of Withdrawal of Counsel	EFile	notice of withdrawal of counsel	2/3 EFO

Figure 1.4 – Filings Page

Error Messages

The system displays several error messages to alert users when they have not entered required information or they provided invalid information.

Password Reset Errors Scenarios

Invalid User – To reset the password for your account, you will need to provide the user name for the account and answer the security question for the account.

Note: That user does not exist.

No Security question on File – No security question on file for (user name). Your Firm Administrator may still reset your password.

Note: Reset your password.

Enter Data in Required Fields

Required fields contain an asterisk (*) next to the field name. If you do not enter information into required fields and try to advance, you will receive error messages.

Note: Required fields may vary in different sections.

Look for a field outlined in red in your form. Place your cursor on the outline of the field. A required field message is displayed.

The screenshot shows a web form titled "Enter the Details for the New Case" with a navigation bar at the top containing "Case Information", "Parties", "Filings", and "Summary". Below the title, a note states "Required fields are bold and have an asterisk (*)". The form contains several fields: "Select Location*", "Select Category*", "Select Case Type*", "Short Title", "Filing Attorney*", and "Payment Account*". The "Select Category*" field is highlighted with a red border and a "Required Field" error message. A "Parties" button is visible in the bottom right corner.

Figure 1.5 – Required Field Error Message

Receive Error Messages

When an invalid error message is displayed, you must complete the required field to continue.

If the screen does not change when you click a navigation button, look for a field outlined in red in your form. Place your cursor on the outline of the field. A required field message is displayed.

The screenshot shows a text input field labeled "Zip*" containing the value "654656". The field is outlined in red. To the right of the field is a red button with the text "Invalid Zip Code".

Figure 1.6 – Invalid Entry Error Message

2 E-Filing Overview

Topics Covered in this Chapter

◆ Filing Queue Status

This section describes the e-filing process.

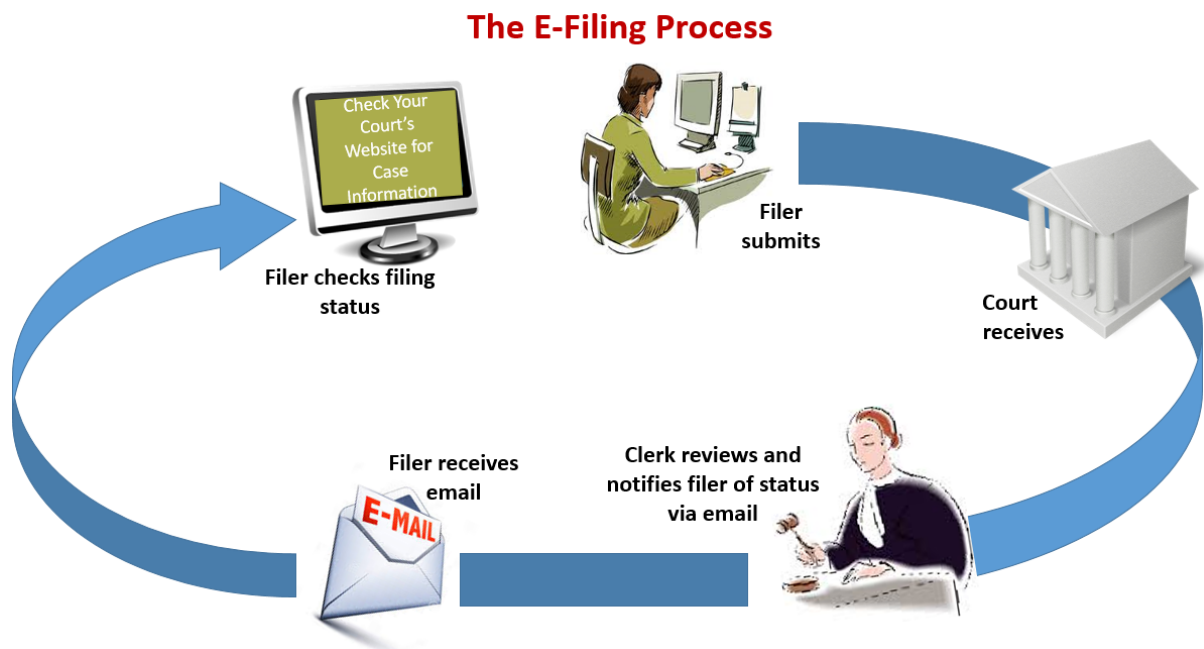


Figure 2.1 – The E-Filing Process

Once a user has registered to use eFileTexas.gov, a filer can electronically file documents to the court. When the filing is submitted, the filing is electronically delivered to the clerk's inbox. The clerk then reviews the filing and either accepts, rejects, or returns the filing.

If the clerk accepts the filing, the case is docketed and set to appear in the clerk's case management system. An email is sent to the filer with the case status along with any pertinent information regarding the case. If the option for service was selected during the filing, service is electronically sent to the contacts on the case.

If the filing is returned or rejected, the envelope is sent back to the filer with a reason for rejection, and the filer is given a time line in which to make the correction and resubmit the filing.

If the filer has questions regarding the filing or case, it is recommended that the filer contact the local court.

Filing Queue Status

The filing queue status lets you know where you are in the e-filing process. The key represents the status listed for your filing.

The following filing status key table describes the status associated with each filing type.

i Note: EFO – EFile Only; EFS – EfileAndServe; SO – Service Only

Status	Filing Type	Definition
Draft	EFO, EFS, SO	The filer has entered full or partial filing data, but has not yet submitted the filing.
Submitting	EFO, EFS, SO	The filer has submitted the filing, but the document file format and payment information have not been verified on the back end.
Submitted	EFO, EFS, SO	The document file format and payment information have been verified and accepted, but the filing has not yet entered the Review Queue/Workflow Process.
Court Processing	EFO, EFS, SO	Some additional action needs to be taken by the court.
Under Review	EFO, EFS	A clerk reviewer has selected a filing from a queue. i Note: Once a filing reaches the Under Review status, it cannot return to the Submitted status. Selecting the End Review retains the Under Review status and returns the filing to the queue.
Received	EFO, EFS	The filing has been acknowledged by the court as received, but it is not being transmitted to the case management system to become part of the court record. The filing may or may not be part of the proposed order work flow.
Accepted	EFO, EFS	The reviewer has reviewed the filing and accepted it.
Rejected	EFO, EFS	The reviewer has reviewed the filing and rejected it.
Returned	EFO, EFS	The reviewer has reviewed and returned the filing as additional action must be taken by the filer. i Note: The filer can cancel or copy a filing in the Returned status.

Status	Filing Type	Definition
Served	SO	Service Only filings are completed.
Service Incomplete (Service Only filings)	SO	One or more servings failed; the service was incomplete. Example: The email or domain was rejected.
Canceled	EFO, EFS, SO	The filer has canceled the filing. The filer can only cancel draft and submitted filings.
Submission Failed	EFO, EFS	A file format or billing error has occurred when the filer submitted the filing. Failure specifics are available on the <i>Details</i> page, and the filer is notified of specifics through email.

3 eFileTexas.gov Home Page

The *Home* page serves as the gateway to the system. From this page, you can register, log in, read your court's message of the day, access the user guides, view training sessions, and get contact information for Technical Support.

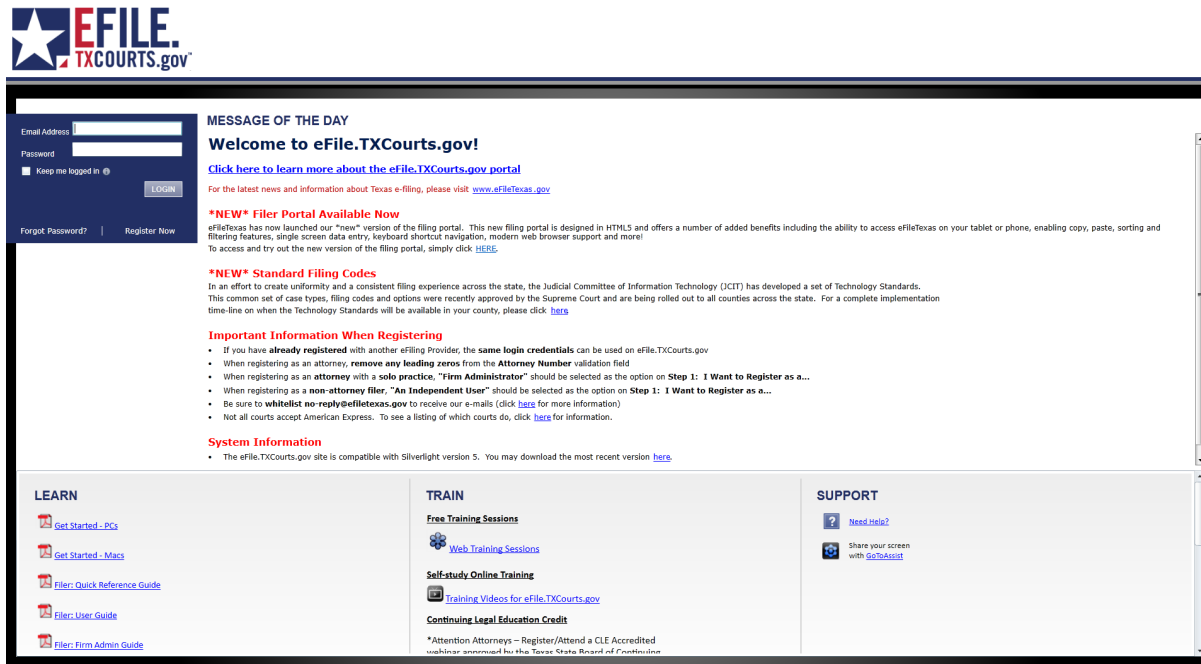


Figure 3.1 – eFileTexas.gov Home Page

Message of the Day

The **Message of the Day** section provides important messages from the court. Check this section daily for important messages from the court.

Login

The **Login** section allows you to log in and use the system. You can log in by entering your email address and password.

Register Now

The **Register Now** link allows you to register using your name, contact, and payment information. The system requires all users – whether Firm Administrators, attorneys, or individuals representing themselves – to be registered in the system.

Forgot Password

The **Forgot Password** link allows you to request that your password information be resent to you in case you have forgotten your password.

Keep Me Logged In

The **Keep me logged in** check box allows you to remain logged in to the system for future access.

Learn

The **Learn** section contains links to the user documentation. The following types of documents are available to help you answer many of your day-to-day operation questions:

- The *Individual Filer User Guide* provides step-by-step instructions on using the system. The user guide covers activities such as logging in to the system, searching for existing cases, selecting the e-file and serve options, performing an e-file and serve, and changing user settings and passwords.
- The *Firm Administrator User Guide* is specifically for the Firm Administrator. This guide covers administrative functions such as registering the firm; managing users, payments, and attorney accounts; and creating and editing the firm's contact lists.
- The *Firm and Criminal Filing Filer User Guide* is specifically for the firm users and the users with the Criminal Filing Filer role who are not Firm Administrators. This guide covers activities such as signing into the system, searching for existing cases, selecting the e-file and serve options, performing an e-file and serve, and changing user settings and passwords.
- The *Quick Reference Guide* (QRG) provides only the steps needed to complete common tasks such as logging in to the system, searching for a case, initiating a new case, filing into an existing case, and reviewing the filing status.
- The *Frequently Asked Questions* (FAQ) guide lists the most frequently asked questions from the users. The FAQ covers questions pertaining to functionality.

Train

Free regularly scheduled online training is available. You can register for training online and download user manuals.

- The **Web Conference Training Sessions** are scheduled according to the needs of the courts. Locate your specific court by scrolling through the list of training sessions for your court.
- **Self-study Online Training** is available by clicking on the link and choosing the topic of your choice.

Support

The Technical Support Team is available to assist all users. Call the Team at 855.839.3453 Monday through Friday between the hours of 7:00 a.m. and 9:00 p.m. Central Time. You can also contact a Technical Support Representative with your questions by sending an email to support@efiletexas.gov or by using the Chat option.

4 eFileTexas.gov Registration

Topics Covered in this Chapter

- ◆ Registering as a New Firm
- ◆ Registering as a User with an Existing Firm
- ◆ Registering as an Independent User
- ◆ Resetting Your Password

Registering as a New Firm

eFileTexas.gov enables each firm to designate a person within the firm to administer the e-filing system. The Firm Administrator registers the firm and is responsible for setting up and maintaining all user, payment, and attorney accounts.

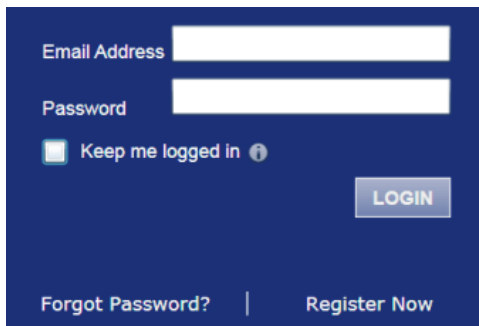


Figure 4.1 – Login Window

To register your firm as a new firm, perform the following steps:

1. Click **Register Now** in the login area.

Note: There is no fee to sign up for eFileTexas.gov.

2. Select the **Firm Administrator** option.

eFileTexas Registration **Step 1 of 5**

I want to Register as a

Firm Administrator
Each firm must have a designated person to administer the E-Filing system. The Administrator will register the firm and be responsible for setting up and maintaining all users, credit card accounts, and attorneys at the firm.

User with an Existing Firm
Your firm has already been registered with the E-Filing system. You must know your firm ID and have been given permission to set up your account by your Firm Administrator. The Firm ID serves as the common identifier for all users within your firm.

An Independent User
You are a single user, not associated with or represented by a law firm.

All required fields are indicated by an "*". There is no registration fee for eFileTexas.

Figure 4.2 – eFileTexas.gov Registration Wizard (Step 1 of 5)

3. Click **Next** to continue, or click **Cancel** to cancel the registration process.
4. Read the terms and conditions for using eFileTexas.gov

eFileTexas Registration **Step 2 of 5**

eFileTexas.gov Usage Agreement

Welcome to eFileTexas.gov, the electronic filing program of the Texas Judicial Branch. Please read this Agreement carefully. It governs Your access to and use of eFileTexas.gov. Your use of eFileTexas.gov is conditioned upon Your acceptance of this Agreement. By clicking on the "I Accept" button or similar button, You are agreeing to be legally bound by all of the terms and conditions of this Agreement. As used in this Agreement, "You" or "Your" includes You and Your employer and Users.

Sections:

1. Definitions
2. License; Restrictions on Use
3. Access to the eFileTexas.gov Internet Site
4. Limitations on Use
5. Representations and Warranties
6. Fees
7. Proprietary Rights
8. Disclaimers and Limitations
9. Your Warranties and Indemnification

I Agree

Previous **Cancel** **Next**

Figure 4.3 – eFileTexas.gov Registration Wizard (Step 2 of 5)

Note: You must agree to the terms and conditions before continuing with the registration process, or you will receive the following error message:

You must agree to the Terms & Conditions before continuing with the registration process.

I Agree

Figure 4.4 – Error Message – Agree to Terms & Conditions

5. Select the I Agree check box to accept the terms and conditions for using eFileTexas.gov.
6. Click **Next** to continue, or click **Cancel** to cancel the registration process.
7. Complete the **Firm Information** form.

Note: An asterisk (*) indicates a required field.

The screenshot displays the 'eFileTexas Registration Step 3 of 5' interface. It is divided into two main sections: 'Firm Information' and 'New User Registration'. The 'Firm Information' section contains several input fields: 'Name*' (text box), 'Country*' (dropdown menu with 'United States of Ame' selected), 'Address Line 1*' (text box), 'Address Line 2' (text box), 'City*' (text box), 'State*' (dropdown menu), 'Zip Code*' (text box), and 'Phone Number*' (text box). The 'New User Registration' section features two checked checkboxes: 'Allow Users to Self Register' and 'Require Administrator Approval of New User Registration'. At the bottom of the form, there are three buttons: 'Previous', 'Cancel', and 'Next'.

Figure 4.5 – eFileTexas.gov Registration Wizard (Step 3 of 5)

8. Select the **Allow Users to Self Register** check box to allow the firm user to register to use eFileTexas.gov without contacting a Firm Administrator.
9. Select the **Require Administrator Approval of New User Registration** check box to have the option to approve every firm user that registers to use eFileTexas.gov.
10. Click **Next** to continue, click **Previous** to return to the previous page, or click **Cancel** to cancel the registration process.
11. Complete the **User Information** form.

The screenshot shows the 'eFileTexas Registration Step 4 of 5' form. The 'User Information' section includes fields for First Name*, Last Name*, Email Address*, Verify Email Address*, Password*, and Verify Password*. There is a checkbox for 'I am also an Attorney' with an 'Attorney' label. Below this, a note instructs the user to 'Compose a simple question and answer pair which will allow you to restore your password, should you forget it. Please choose a simple, specific question that can only be answered by you. Example: High School Mascot or The Name of My First Pet.' This is followed by 'Security Question*' and 'Security Answer*' fields. At the bottom are 'Previous', 'Cancel', and 'Register' buttons.

Figure 4.6 – eFileTexas.gov Registration Wizard (Step 4 of 5)

12. Type a question in the **Security Question** field.

eFileTexas.gov requests your security question to restore your password in case you forget your password.

The screenshot shows a single text input field with the label 'Security Question*' to its left.

Figure 4.7 – Security Question Field

13. Type a response in the **Security Answer** field.

The screenshot shows a single text input field with the label 'Security Answer*' to its left.

Figure 4.8 – Security Answer Field

14. Click **Register**.

eFileTexas.gov displays the **Your Registration is Complete.** message.

eFileTexas Registration **Step 5 of 5**

Your Registration is Complete.

Your login information is listed below and will be emailed to you.

Firm ID: Test firm
Email Address: [REDACTED]

You must verify your email address before you can log in. A verification email has been sent to you, please open it and click the link inside.

Finish

Figure 4.9 – eFileTexas.gov Registration Wizard (Step 5 of 5)

15. Click **Finish** to continue.

i Note: You must verify your email address to complete the registration process. A verification email (from No-Reply@eFileTexas.gov) will be sent to you. Open the email, and click the link to confirm your email address. If you do not see the email in your inbox, check your junk mail folder for the email.

Your registration is now complete. Access your *Home* page to log in to use eFileTexas.gov.

Registering as a User with an Existing Firm

You can register as a user if your Firm Administrator has already registered with the system and approved users to self-register.

i Note: You must know your firm's name to set up your account. The Firm Administrator may not allow users to self-register. If this is the case, the firm's name is not available when you search for the name, and you must contact the Firm Administrator to be registered.

Figure 4.10 – Login Window

To register as a user in the firm, perform the following steps:

1. Click **Register Now** in the login section.

The eFileTexas.gov Registration Wizard is displayed.

Note: There is no fee to sign up for the product.

Note: Registration options vary by site.

2. Select the **User with an Existing Firm** option.
3. Click **Next** to select your firm, or click **Cancel** to cancel the registration process.
4. Type your firm name in the **Firm Name** field, or click **Search** to view a list of all available firms. Select your firm name from the list.
5. Click **Next** to enter your account information, click **Previous** to return to the previous page, or click **Cancel** to cancel the registration process.

Note: An asterisk (*) indicates required information.

6. Complete the **User Information** form.
7. Type a simple security question in the **Security Question** field. (Example: What was your high school mascot?)

Figure 4.11 – Security Question Field

8. Type a security answer in the **Security Answer** field.

Figure 4.12 – Security Answer Field

Note: Select the I am also an Attorney check box if you are an attorney, and then enter your attorney number in the field. Attorney number formats vary by site. Refer to your court's website for information on how to enter your attorney number.

Attorney Number*

Figure 4.13 – Attorney Number Field

Note: Click **Verify** if prompted. This action verifies that your attorney number is in the system.

- Click **Register**.

The system displays the **Your Registration is Complete** message.

- Record the login details displayed for your records.
- Click **Finish**.
- Navigate to your email inbox to access your registration confirmation email.

Note: You must verify your email address to complete the registration process. A verification email (from No-Reply@eFileTexas.gov) will be sent to you. Open the email and click the link to confirm your email address. If you do not see the email in your inbox, check your junk mail folder for the email.

Your registration is now complete. Once you have received your email confirmation, return to the login section to log in.

Registering as an Independent User

You can register as an “independent user” if you are a single user of the system. A single user is a user who is not associated with any firm or represented by any firm.

Note: Refer to your local court’s website before registering as an independent user because the registration options may vary.

To register as an independent user, perform the following steps:

- Click **Register Now**.

Note: There is no fee to sign up for e-filing.

- Select the **An Independent User** option.
- Click **Next** to continue, click **Previous** to go back, or click **Cancel** to cancel the registration process.
- Read the Usage Agreement before proceeding.
- Select the **I Agree** check box to accept and agree to the terms listed on your page.
- Click **Next** to continue, click **Previous** to go back, or click **Cancel** to cancel the registration process.
- Complete the **Contact Information** form.
- Click **Next** to continue, click **Previous** to go back, or click **Cancel** to cancel the registration process.
- Complete the **User Information** form.
- Type a question in the **Security Question** field.

Note: Your security question is required to restore your password in case you forget your password.

- Type a response in the **Security Answer** field.

12. Click **Register**.

The message *Your Registration is Complete* is displayed.

13. Click **Finish**.

i Note: You must verify your email address to complete the registration process. A verification email (from No-Reply@eFileTexas.gov) will be sent to you. Open the email, and click the link to confirm your email address. If you do not see the email in your inbox, check your junk mail folder for the email.

Your registration is complete. Access your *Home* page to log in.

Resetting Your Password

If you have forgotten your password, you can reset your password by entering the email address provided during registration and then clicking **Forgot Password?**.

i Note: Your password is case-sensitive. Ensure that the caps lock setting is not on.

i Note: You can unlock your account by using the **Forgot Password?** option and resetting your password without having to contact the Firm Administrator if a security question is associated with the account.

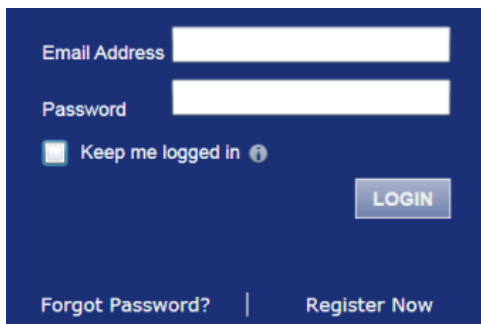


Figure 4.14 – Login Window

To reset your password, perform the following steps:

1. Click **Forgot Password?** on the *Login* window.

The *Reset Password* window is displayed.



Figure 4.15 – Reset Password – Email Address

2. Type the email address you provided during the registration process in the **Email Address** field.

i Note: An error message stating that no user is registered with the email address is displayed if the system is unable to find your email address.

3. Click **Next** to continue.
4. Type your answer in the **Security Answer** field.
5. Click **Ok**, or click **Cancel** to cancel the reset password process.

The system displays this message: A password reset link has been sent to the email address associated with your account. If you do not see the password reset email in your Inbox, please check to see if it was delivered to your spam folder.

6. Access your email inbox.
7. Locate the email from No-Reply@eFileTexas.gov.
8. Click the link labeled **Click here** to reset your password.

You are prompted to choose a new password.

9. Type a new password in the **New Password** field.
10. Retype your new password in the **Repeat New Password** field.
11. Click **Change Password**.

A confirmation screen displays this message: Your password has been changed successfully.

5 Login and Logout

Topics Covered in this Chapter

- ◆ Logging In
- ◆ Logging Out

All users are required to log in to e-file and serve a document or to check the status of an existing filing. It is also a best practice for users to log out after they have completed their transactions.

Logging In

You can log in by using your email address and password provided during the registration process. You must log in to be able to e-file or e-serve.

i Note: Click [Register Now](#) to register if you have not registered before.

To log in, perform the following steps:

1. Access your *Home* page.
2. Type your email address and password (case-sensitive) in the fields provided.

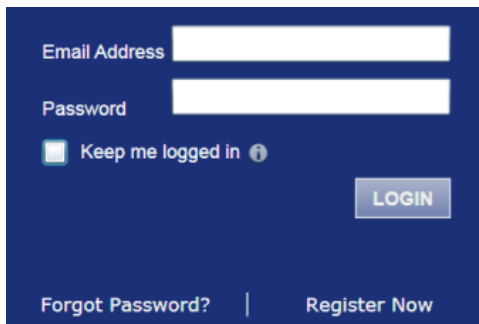
The image shows a login form on a dark blue background. It features two white input fields: 'Email Address' and 'Password'. Below the password field is a checkbox labeled 'Keep me logged in' with an information icon to its right. A 'LOGIN' button is positioned to the right of the password field. At the bottom of the form, there are two links: 'Forgot Password?' and 'Register Now', separated by a vertical line.

Figure 5.1 – Login Window

3. Select the [Keep me logged in](#) check box to stay logged in.

This action keeps you logged in until you click the logout link to log out.

4. Click [LOGIN](#).

i Note: After several failed attempts to log in to the system, your account is locked. You can unlock your account by using the [Forgot Password?](#) option. If a security question is associated with the account, you will not have to contact the Firm Administrator to reset your password.

Once you have successfully logged in, you can begin to e-file and e-serve.

Logging Out

This section describes how to properly log out.

To log out, perform the following steps:

1. Click **LOGOUT** to automatically log out.

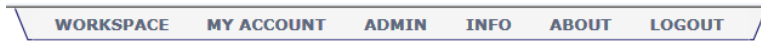


Figure 5.2 – Logout Link

2. Return to the *Home* page to log in to the system.

6 Case Search

Topics Covered in this Chapter

- ◆ Searching for a Case
- ◆ Advanced Search
- ◆ Performing an Advanced Search by Person
- ◆ Performing an Advanced Search by Business

You can search for a case by selecting a location and entering a case number or a party name.

Searching for a Case

You can search for a case by selecting a location and then entering the case number or the party name in the search field.



Figure 6.1 – Case Search Option

To search for a case, perform the following steps:

1. Click the drop-down arrow to select a location.
2. Type the exact case number assigned by the court, or type the party's name in the search field.

Note: No wild cards can be used in the search field.

3. Click **Go**.

The *Case Search* page displays the case that meets the criteria that are entered in the search field.



Figure 6.2 – Case Search Results

- Click an icon under the **Actions** column and perform actions as necessary, or click **Close** if you do not want to perform any further actions.

Advanced Search

The Advanced Search feature provides the ability to search by party name using a person's name or a business name. The Advanced Search feature includes the ability to filter a search by party name based on the location or the case type.

Performing an Advanced Search by Person

Search for a case by selecting a location and entering a case number or a party name. The Advanced Search feature provides the ability to search by party name using a person's name.

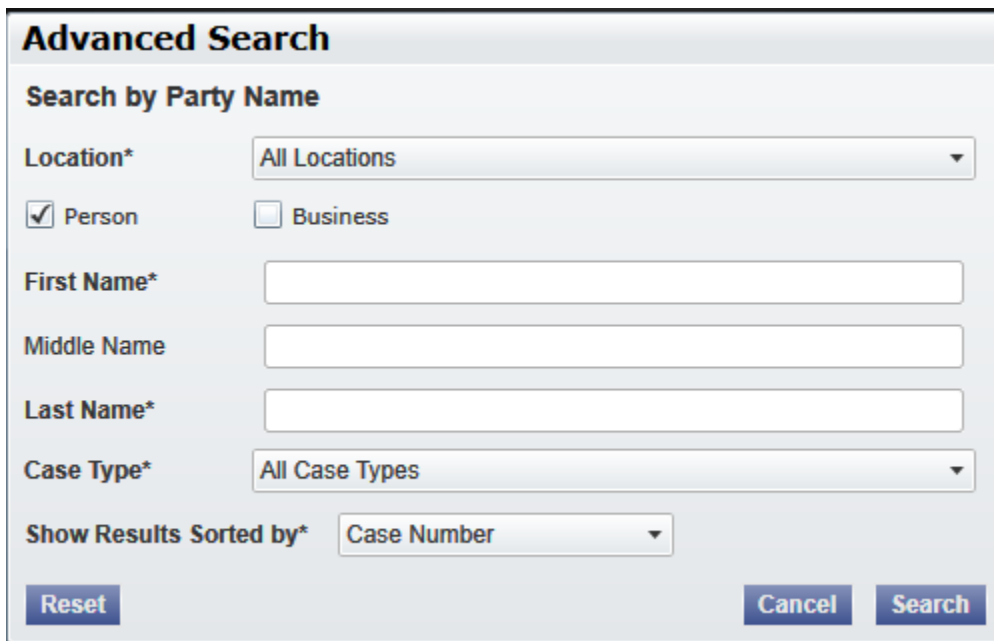
Note: An asterisk (*) indicates a required field.

Note: Color themes can vary by site.

To run an Advanced Search using the **Person** option, perform the following steps:

- Click **Advanced Search** in the **New Case** section.

The *Advanced Search* dialog box opens.



The image shows a screenshot of the 'Advanced Search' dialog box. It has a title bar 'Advanced Search' and a subtitle 'Search by Party Name'. The form contains several fields: 'Location*' is a dropdown menu with 'All Locations' selected; 'Person' and 'Business' are checkboxes, with 'Person' checked; 'First Name*', 'Middle Name', and 'Last Name*' are text input fields; 'Case Type*' is a dropdown menu with 'All Case Types' selected; and 'Show Results Sorted by*' is a dropdown menu with 'Case Number' selected. At the bottom, there are three buttons: 'Reset', 'Cancel', and 'Search'.

Figure 6.3 – Advanced Search Dialog Box

2. Select the **Person** check box.

i Note: Check boxes are configurable. This option may vary by site. For example, some clients may only have businesses listed in the case management system, so a check box is not required.

3. Complete the fields in the *Advanced Search* dialog box.
4. Click **Search** to continue, or click **Cancel** to cancel. Click **Reset** to reset the form.

The search results are displayed.

Performing an Advanced Search by Business

The Advanced Search feature provides the ability to search by party name using a business name.

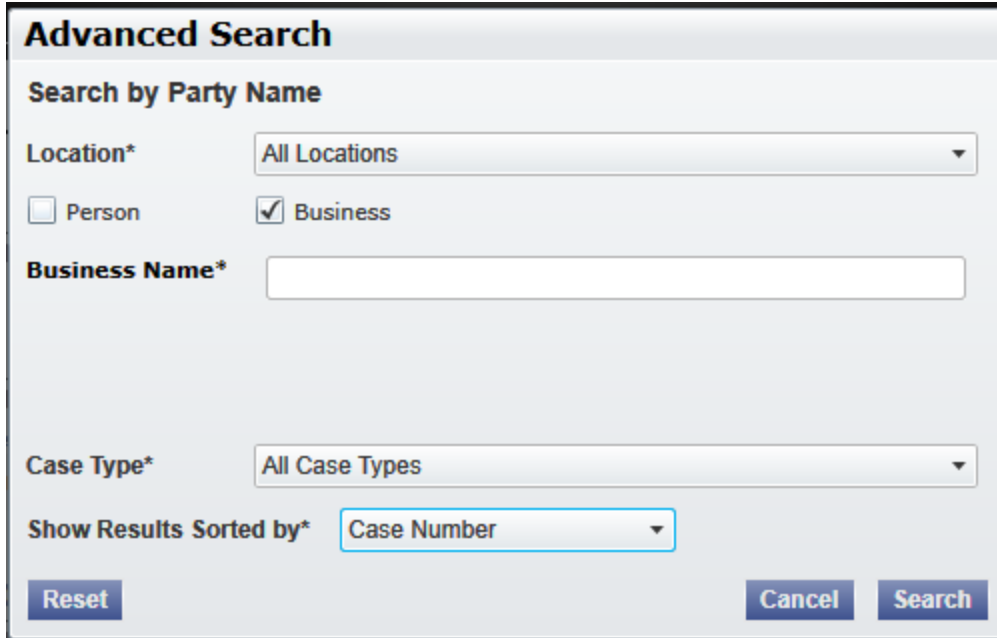
i Note: An asterisk (*) indicates a required field.

i Note: Color themes can vary by site.

To run an Advanced Search using the **Business** option, perform the following steps:

1. Click **Advanced Search** in the **New Case** section.

The *Advanced Search* dialog box opens.



The image shows a software dialog box titled "Advanced Search". It has a header "Search by Party Name". Below this, there are several fields: "Location*" is a dropdown menu currently showing "All Locations"; "Person" and "Business" are checkboxes, with "Business" checked; "Business Name*" is an empty text input field; "Case Type*" is a dropdown menu currently showing "All Case Types"; and "Show Results Sorted by*" is a dropdown menu currently showing "Case Number". At the bottom of the dialog box are three buttons: "Reset", "Cancel", and "Search".

Figure 6.4 – Advanced Search Dialog Box

2. Select the **Business** check box.

Note: Check boxes are configurable. This option may vary by site. For example, some clients may only have businesses listed in the case management system, so a check box is not required.

3. Complete the fields in the *Advanced Search* dialog box.
4. Click **Search** to continue, or click **Cancel** to cancel. Click **Reset** to reset the form.

The search results are displayed.

7 Firm Administrator Functions

Topics Covered in this Chapter

- ◆ Manage New Users
- ◆ Manage Firm User Accounts
- ◆ Manage Attorney Accounts
- ◆ Manage Payment Accounts
- ◆ Manage Firm Information

Firm Administrators are responsible for managing users, attorneys, and payments, along with updating firm information.

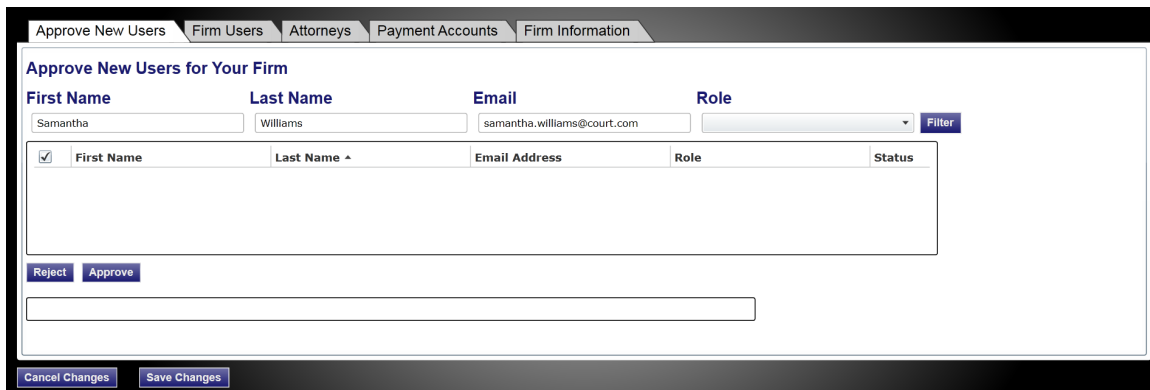
Manage New Users

If the **Require Administrator Approval of New User Registration** option is selected on the *Firm Information* page, the Firm Administrator receives notification to either approve or reject the request for an account when a new user registers.

Filtering New Users Options

The Firm Administrator can filter users by name, email address, and role assigned. You must be a Firm Administrator to perform this task.

i Note: Features vary based on your system configuration.



The screenshot shows a web interface for managing users. At the top, there are navigation tabs: 'Approve New Users', 'Firm Users', 'Attorneys', 'Payment Accounts', and 'Firm Information'. The main heading is 'Approve New Users for Your Firm'. Below this, there are four input fields: 'First Name' (containing 'Samantha'), 'Last Name' (containing 'Williams'), 'Email' (containing 'samantha.williams@court.com'), and 'Role' (a drop-down menu). A 'Filter' button is located to the right of the 'Role' field. Below these fields is a table with a checked checkbox and the following columns: 'First Name', 'Last Name', 'Email Address', 'Role', and 'Status'. At the bottom of the table area, there are 'Reject' and 'Approve' buttons. At the very bottom of the page, there are 'Cancel Changes' and 'Save Changes' buttons.

Figure 7.1 – Filter New Users Options on the Approve New Users for Your Firm Page

To filter new users' options, perform the following steps:

1. From the *Home* page, click **FIRM ADMIN**.
The *Approve New Users* page is displayed.
2. Type the user name or email address, or select a role from the drop-down list.
3. Click **Filter**.

The firm users that meet your criteria are displayed.

Approving and Rejecting New Users

The Firm Administrator approves or rejects new users for the firm.

To accept or reject new users for your firm, perform the following steps:

1. Click **FIRM ADMIN** on the *Home* page.
2. Click **Approve New Users**.

Figure 7.2 – Approve New Users Page

3. Select the user from either the **Approve** list or the **Reject** list.
4. Verify that the user information is correct.

Note: If the user information is incorrect, select the check box next to the user's name, and correct the information in the contact window below **Reject** and **Approve**.

5. Click **Approve** to approve the new user, or click **Reject** to reject the new user.
6. Click **Save Changes** to save the changes and continue, or click **Cancel Changes** to cancel any changes that you made.

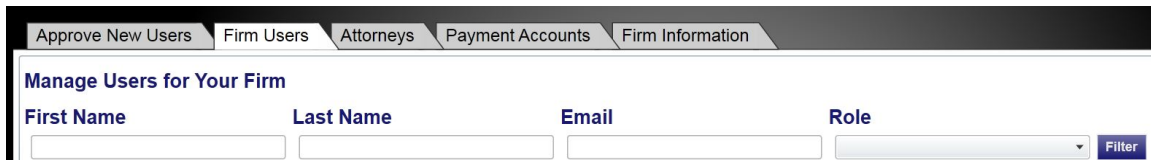
Manage Firm User Accounts

The Firm Administrator is responsible for registering and approving new users. The Firm Administrator may also add user accounts, reset passwords, and activate and deactivate user accounts for firm users.

Filtering Firm Users Options

The Firm Administrator can filter users by name, email address, and role assigned. You must be a Firm Administrator to perform these tasks.

Note: Features vary based on your system configuration.



The screenshot shows a navigation bar with tabs: 'Approve New Users', 'Firm Users', 'Attorneys', 'Payment Accounts', and 'Firm Information'. Below the navigation bar is a section titled 'Manage Users for Your Firm'. Under this title, there are four input fields: 'First Name', 'Last Name', 'Email', and 'Role'. The 'Role' field is a dropdown menu. To the right of the 'Role' dropdown is a blue button labeled 'Filter'.

Figure 7.3 – Filter Firm Users Options on the Firm Users Page

To filter firm users' options, perform the following steps:

1. Click **FIRM ADMIN** on the *Home* page.
The *Approve New users* page is displayed.
2. Click **Firm Users**.
The *Firm Users* page is displayed.
3. Type the user name or email address, or select a role from the drop-down list.
4. Click **Filter**.

The firm users that meet your criteria are displayed.

Adding Firm User Accounts

The Firm Administrator is responsible for adding firm user accounts.

i Note: An asterisk (*) indicates a required field.

To add users to the firm's account, perform the following steps:

1. Click **FIRM ADMIN** on the *Home* page.
The *Approve New users* page is displayed.
2. Click **Firm Users**.

The *Firm Users* page is displayed.

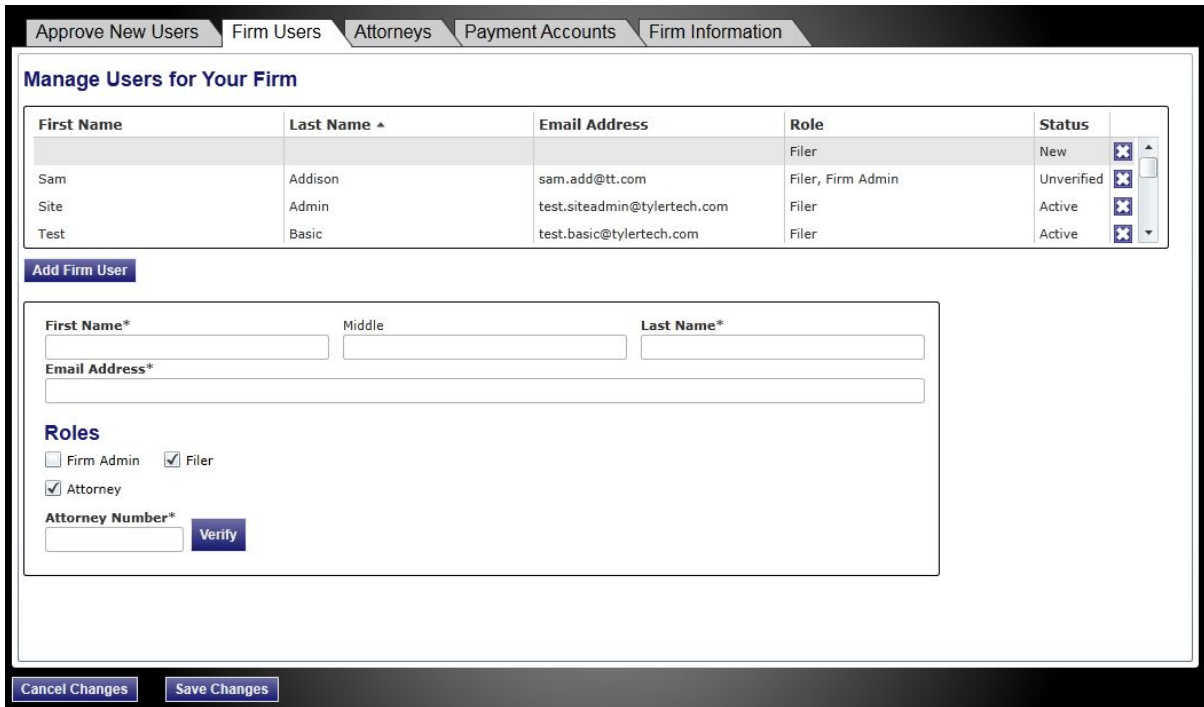


Figure 7.4 – Firm Users Page

3. Click **Add Firm User**.
4. Complete the required fields to add a new user.
5. Assign a new firm user role.



Figure 7.5 – Firm User Roles

- Select **Firm Admin** to assign the Firm Administrator role to the new firm user. **Note: Firm Administrators are responsible for managing users, attorneys, and payments; and for updating firm information.**
 - Select **Filer** to assign the Filer role to the new firm user.
6. Select **Attorney** to allow other users to select the option to save a firm user as an attorney when they are filing.

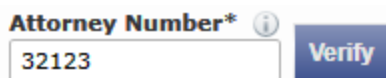


Figure 7.6 – Attorney Number Field

- a. Type the attorney number in the **Attorney Number** field.

- b. Click **Verify**.

The system verifies the attorney number and displays the results.

7. Click **Save Changes** to save the changes and continue, or click **Cancel Changes** to cancel any changes made.

The new user information is displayed at the top of the page.

Editing Firm User Accounts

The Firm Administrator is responsible for editing firm user accounts.

To edit firm user account information, perform the following steps:

1. Click **FIRM ADMIN** on the *Home* page.

The *Approve New users* page is displayed.

2. Click **Firm Users**.

The *Firm Users* page is displayed.

The screenshot displays the 'Manage Users for Your Firm' interface. At the top, there are navigation tabs: 'Approve New Users', 'Firm Users', 'Attorneys', 'Payment Accounts', and 'Firm Information'. The main content area is titled 'Manage Users for Your Firm' and contains a table with the following data:

First Name	Last Name ^	Email Address	Role	Status	
			Filer	New	[X] [^]
Sam	Addison	sam.add@tt.com	Filer, Firm Admin	Unverified	[X] [^]
Site	Admin	test.siteadmin@tylertech.com	Filer	Active	[X] [^]
Test	Basic	test.basic@tylertech.com	Filer	Active	[X] [^]

Below the table is an 'Add Firm User' section with the following fields and options:

- First Name***: [Text Input]
- Middle**: [Text Input]
- Last Name***: [Text Input]
- Email Address***: [Text Input]
- Roles**:
 - Firm Admin
 - Filer
 - Attorney
- Attorney Number***: [Text Input] **Verify**

At the bottom of the page, there are two buttons: **Cancel Changes** and **Save Changes**.

Figure 7.7 – Firm Users Page

3. Select the firm user you want to edit.
4. Edit the information for the specified user.
5. Click **Save Changes** to save the changes and continue, or click **Cancel Changes** to cancel any changes made.

Deleting Firm User Accounts

The Firm Administrator is responsible for deleting firm user accounts.

To delete a firm user account, perform the following steps:

1. Click **FIRM ADMIN** on the *Home* page.


The *Approve New users* page is displayed.

2. Click **Firm Users**.

The *Firm Users* page is displayed.

First Name	Last Name	Email Address	Role	Status
			Filer	New
Sam	Addison	sam.add@tt.com	Filer, Firm Admin	Unverified
Site	Admin	test.siteadmin@tylertech.com	Filer	Active
Test	Basic	test.basic@tylertech.com	Filer	Active

Figure 7.8 – Firm Users Page

3. From the list of users, select the firm user that you want to delete.
4. Click  to delete the user from the list.
5. Click **Save Changes** to save the changes and continue, or click **Cancel Changes** to cancel any changes made.

Resending Activation Email

The resend activation email feature allows the Firm Administrator to resend the activation email for the selected account. Use this feature in situations where the user did not receive the initial activation email or the email address must be corrected to activate the user account. This feature is only available if the account status is “Unverified.”

To resend the activation email to the user, perform the following steps:

1. Click **FIRM ADMIN** on the *Home* page.

The *Approve New users* page is displayed.

2. Click **Firm Users**.

The *Firm Users* page is displayed.

The screenshot shows the 'Firm Users' page with a navigation bar containing 'Approve New Users', 'Firm Users', 'Attorneys', 'Payment Accounts', and 'Firm Information'. Below the navigation bar is a table with the following data:

First Name	Last Name	Email Address	Role	Status
Janice	Doe	jdoe@courts.com	Filer, Firm Admin	Active

Below the table is an 'Add Firm User' form with the following fields and options:

- First Name***: Janice
- Middle**: (empty)
- Last Name***: Doe
- Email Address***: jdoe@courts.com
- Roles**:
 - Firm Admin
 - Filer
 - Save Firm User As Attorney
- Attorney Number***: 321123

At the bottom of the form is a blue link labeled 'Resend Activation'. At the bottom of the page are two buttons: 'Cancel Changes' and 'Save Changes'.

Figure 7.9 – Resend Activation Link on the Firm Users Page

- Click [Resend Activation](#).

This feature resends the initial activation email that was previously sent to the user when the Firm Administrator created the new user account.

- Instruct the user to check the email account for an email with the account activation information.

Note: This email includes a link to activate the account and the new system-generated user password.

Resetting User Passwords

The resetting user passwords feature allows the Firm Administrator to manually reset the user password. The Firm Administrator manually sends or gives the user the new password since the system does not automatically send an email to the user. This feature is available when the account status is "Active."

To manually reset the user password, perform the following steps:

- Click **FIRM ADMIN** on the *Home* page.

The *Approve New users* page is displayed.

- Click **Firm Users**.

The *Firm Users* page is displayed.

The screenshot shows a web application interface for managing users. At the top, there are navigation tabs: 'Approve New Users', 'Firm Users', 'Attorneys', 'Payment Accounts', and 'Firm Information'. The 'Firm Users' tab is selected. Below the tabs is a section titled 'Manage Users for Your Firm'. It contains a table with the following data:

First Name	Last Name	Email Address	Role	Status
Janey	Dominican	janeydominican@test.com	Filer, Firm Admin, Court Admin, Review	Active

Below the table is an 'Add Firm User' button. Underneath is a form with the following fields:

- First Name***: Janey
- Middle**: (empty)
- Last Name***: Dominican
- Email Address***: janeydominican@test.com

Below the form are three checkboxes for roles:

- Firm Admin
- Filer
- Attorney

At the bottom right of the form area is a blue link labeled 'Reset Password'. At the bottom of the page are two buttons: 'Cancel Changes' and 'Save Changes'.

Figure 7.10 – Reset Password Link on the Firm Users Page

3. Click [Reset Password](#).

The *Enter New Password* dialog box is displayed.

The screenshot shows a dialog box titled 'Enter New Password'. It contains the following text:

The password is case sensitive, must be 6-10 characters, and should not contain spaces or special characters.

Below the text are two input fields:

- New Password***: (empty)
- Re-enter New Password***: (empty)

At the bottom of the dialog box are two buttons: 'Continue' and 'Cancel'.

Figure 7.11 – Enter New Password Dialog Box

4. Type a new password in the **New Password** field.
- Note:** Passwords are case-sensitive. A password must be six to 10 characters long and should not contain any spaces or special characters.
5. Retype the new password in the **Re-enter New Password** field.
6. Click **Continue** to save and continue, or click **Cancel** to cancel the new password process.

Unlocking User Accounts

The unlocking user accounts feature allows the Firm Administrator to unlock a user's account. The system locks an account after the user makes five unsuccessful attempts at logging in. The Firm Administrator must manually enter a new password for the user. Once the Firm Administrator has unlocked the account, he or she must send the new password to the user. This feature is only available when the account status is "Locked."

To unlock a user's account, perform the following steps:

1. Click **FIRM ADMIN** on the *Home* page.

The *Approve New users* page is displayed.

2. Click **Firm Users**.

The *Firm Users* page is displayed.

First Name	Last Name *	Email Address	Role	Status
Janice	Doe	jdoe@courts.com	Filer, Firm Admin	Active

Add Firm User

First Name* Middle Last Name*

Email Address*

Roles

Firm Admin Filer

Save Firm User As Attorney

Attorney Number* [Unlock Account](#)

Figure 7.12 – Unlock Account Link on the Firm Users Page

3. Click **Unlock Account**.

The *Enter New Password* dialog box is displayed.

Enter New Password

The password is case sensitive, must be 6-10 characters, and should not contain spaces or special characters.

New Password*

Re-enter New Password*

Figure 7.13 – Enter New Password Dialog Box

4. Type a new password in the **New Password** field.

Note: Passwords are case-sensitive. A password must be six to 10 characters long and should not contain any spaces or special characters.

5. Retype the new password in the **Re-enter New Password** field.
6. Click **Continue** to save and continue, or click **Cancel** to cancel the new password process.

Note: The Firm Administrator must manually send an email or contact the user with the new password. The system does not automatically send the user an email with the new user password.

Manage Attorney Accounts

The Firm Administrator is responsible for managing attorney accounts.

Adding Attorney Accounts

The Firm Administrator can add attorneys to the firm's user accounts or the attorney list.

To add an attorney to the attorney list, perform the following steps:

1. Click **FIRM ADMIN** on the *Home* page.

The *Approve New users* page is displayed.

2. Click **Attorneys**.

The *Attorneys* page is displayed.

Figure 7.14 – Attorneys Page

3. Click **Add Attorney**.
4. Complete the required fields to add a new attorney.

- Type the attorney's number in the **Attorney Number** field.
- Click **Verify**.

The system verifies the attorney number.

- Click **Save Changes** to save the changes and continue, or click **Cancel Changes** to cancel any changes made.

Editing Attorney Accounts

The Firm Administrator can edit the attorney's information on the *Attorneys* page.

To edit the information entered for each attorney, perform the following steps:

- Click **FIRM ADMIN** on the *Home* page.

The *Approve New users* page is displayed.

- Click **Attorneys**.

The *Attorneys* page is displayed.

The screenshot shows the 'Manage Attorneys for Your Firm' interface. At the top, there are navigation tabs: 'Approve New Users', 'Firm Users', 'Attorneys', 'Payment Accounts', and 'Firm Information'. The 'Attorneys' tab is selected. Below the tabs is a table with the following data:

First Name	Last Name ^	Attorney Number
Joshua	Okanawa	978546

Below the table is an 'Add Attorney' button. Underneath is a form for adding a new attorney with the following fields and options:

- First Name***: Joshua
- Middle**: (empty)
- Last Name***: Okanawa
- Attorney Number***: 978546 (with a **Verify** button)
- Save Attorney as Firm User
- Roles**:
 - Firm Admin
 - Filer
- Email Address***: jokanawa@bradfordlaw.com

At the bottom of the form are **Cancel Changes** and **Save Changes** buttons.

Figure 7.15 – Attorneys Page

- Select the firm user that you want to edit.
- Complete the required fields.
- Click **Save Changes** to save the changes and continue, or click **Cancel Changes** to cancel any changes made.

Deleting Attorney Accounts

The Firm Administrator can delete an attorney's account on the *Attorneys* page.

To delete an attorney's account, perform the following steps:

1. Click **FIRM ADMIN** on the *Home* page.


The *Approve New users* page is displayed.

2. Click **Attorneys**.

The *Attorneys* page is displayed.

The screenshot shows the 'Manage Attorneys for Your Firm' interface. At the top, there are navigation tabs: 'Approve New Users', 'Firm Users', 'Attorneys', 'Payment Accounts', and 'Firm Information'. The main heading is 'Manage Attorneys for Your Firm'. Below this is a table with columns 'First Name', 'Last Name', and 'Attorney Number'. The table contains one entry: Joshua Okanawa with Attorney Number 978546. To the right of the table is a blue button with a white 'X' icon. Below the table is an 'Add Attorney' section. It includes input fields for 'First Name*' (Joshua), 'Middle', and 'Last Name*' (Okanawa). There is an 'Attorney Number*' field with the value 978546 and a 'Verify' button. A checkbox labeled 'Save Attorney as Firm User' is checked. Under the heading 'Roles', there are two checked checkboxes: 'Firm Admin' and 'Filer'. An 'Email Address*' field contains the text 'jokanawa@bradfordlaw.com'. At the bottom of the form are two buttons: 'Cancel Changes' and 'Save Changes'.

Figure 7.16 – Attorneys Page

3. Select the attorney you want to delete.
4. Click  next to the attorney's name to delete the attorney from the list.
5. Click **Save Changes** to save the changes and continue, or click **Cancel Changes** to cancel any changes made.

Manage Payment Accounts

The Firm Administrator is responsible for managing payment accounts for vendor and statutory filing fees. Firms can have multiple payment accounts if needed. Credit cards and waivers are valid forms of payments for filing fees.

Adding Payment Accounts

The system requires all firms to have a payment account. The Firm Administrator adds payment accounts for the firm.

To add payment accounts for your firm, perform the following steps:

1. Click **FIRM ADMIN** on the *Home* page.

The *Approve New users* page is displayed.

2. Click **Payment Accounts**.

The *Payment Accounts* page is displayed.

Note: Depending on your setup, all features may not be available. As a result, your page may vary from what is shown here as an example.

The screenshot displays the 'Payment Accounts' page. At the top, there are navigation tabs: 'Approve New Users', 'Firm Users', 'Attorneys', 'Payment Accounts', and 'Firm Information'. The 'Payment Accounts' tab is selected. Below the tabs, the page title is 'Payment Accounts'. A table lists existing accounts:

Payment Account Name	Payment Account Type	Active
Test Amex (AMEX 0005)	Credit Card	Yes
Test Waiver	Waiver	Yes
Credit Card	Credit Card	No
Plano County	Draw Down	No

Below the table are two buttons: 'Add Payment Account' and 'Refresh'. Underneath is a form to add a new account with the following fields:

- Payment Account Name***: A text input field.
- Payment Account Type***: A dropdown menu.
- Available at all locations

At the bottom of the form are two buttons: 'Cancel Changes' and 'Save Changes'.

Figure 7.17 – Payment Accounts Page

3. Click **Add Payment Account**.
4. Type a payment account name in the **Payment Account Name** field.
5. Select a payment account type (cash, credit card, draw down, or waiver) from the **Payment Account Type** drop-down list.

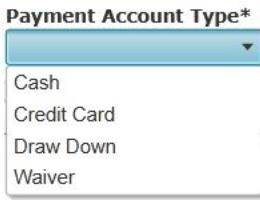


Figure 7.18 – Payment Account Type Drop-Down List

- Select **Cash** if the payment account is cash.



Figure 7.19 – Payment Account Fields

- Select **Credit Card** if the payment account is a credit card. Click **Enter Credit Card Information** to enter the credit card information. **Note:** The system may redirect you to a secure payment processing site to enter the credit card information. You may need to turn off your browser's pop-up blocker to be able to add the credit card information.
- Select **Draw Down** if the payment account is a draw-down account. Click **Enter Draw Down Information** to select a draw-down account. The *Draw Down* selection window is displayed.

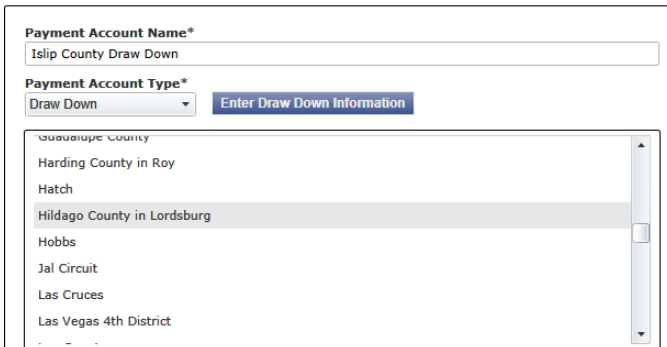


Figure 7.20 – Draw Down Selection Window

Select a draw-down account from the drop-down list.

- Select **Waiver** if the payment account is a waiver. **Note:** The Active check box is displayed when you select the Waiver payment account type.

6. Select the Active check box to activate the payment account.

7. Select the **Available at all locations** check box to make the selected payment type available at all locations associated with the payment account.
8. Click **Save Changes** to save the changes and continue, or click **Cancel** to cancel any changes made.

The system displays the payment account information at the top of the page.

Deactivating Payment Accounts

The Firm Administrator is responsible for deactivating payment accounts.

To deactivate firm payment accounts, perform the following steps:

1. Click **FIRM ADMIN** on the *Home* page.

The *Approve New users* page is displayed.

2. Click **Payment Accounts**.

The *Payment Accounts* page is displayed.

The screenshot shows the 'Payment Accounts' page with the following table:

Payment Account Name	Payment Account Type	Active
Waiver	Waiver	True
Court Credit Card (MC 5678)	Credit Card	True
TOGA Account (MC 5454)	Credit Card	True
		True

Below the table are buttons for 'Add Payment Account' and 'Refresh'. The 'Add Payment Account' form includes:

- Active
- Payment Account Name:
- Payment Account Type:
- Available at all locations

At the bottom of the form are buttons for 'Cancel Changes' and 'Save Changes'.

Figure 7.21 – Payment Accounts Page

3. Select the firm payment account that you want to deactivate.
4. Clear the **Active** check box to deactivate the payment account.
5. Click **Save Changes** to save the changes and continue, or click **Cancel Changes** to cancel any changes made.

Editing Payment Accounts

Once a payment account has been entered, only the payment account name and the payment account type can be changed. You cannot edit credit card information once it has been entered. Instead, deactivate the payment account, and then add a new one.

To edit firm payment accounts, perform the following steps:

1. Click **FIRM ADMIN** on the *Home* page.

The *Approve New users* page is displayed.

2. Click **Payment Accounts**.

The *Payment Accounts* page is displayed.

Payment Account Name	Payment Account Type	Active
Waiver	Waiver	True
Court Credit Card (MC 5678)	Credit Card	True
TOGA Account (MC 5454)	Credit Card	True

Active
 Payment Account Name:
 Payment Account Type:
 Available at all locations

Figure 7.22 – Payment Accounts Page

3. Select the firm payment account that you want to edit.
4. Edit the payment account name or type as needed.
5. Click **Save Changes** to save the changes and continue, or click **Cancel Changes** to cancel any changes made.

Manage Firm Information

The Firm Administrator uses the *Firm Information* page to update the contact information for the firm (name, address, and phone number). The Firm Administrator can also use the *Firm Information* page to manage the registration process by either retaining the authority to register new users or allowing users to self register.

Updating Firm Information

On the *Firm Information* page, you can update your firm's contact information, change how a new user registers to use the system, allow the users to self-register, and change the approval process.

To update firm information, perform the following steps:

1. Click **FIRM ADMIN** on the *Home* page.
The *Approve New users* page is displayed.
2. Click **Firm Information**.
The *Firm Information* page is displayed.

Firm Information

Name* Law Firm of America

Country* United States of America

Address Line 1* 6500 Industrial Pkwy

City* Huntsville

State* Texas Zip Code* 73024

Phone Number* 972-999-2343

New User Registration

Allow Users to Self Register

Require Administrator Approval of New User Registration

Cancel Changes Save Changes

Figure 7.23 – Firm Information Page

3. Update the information on the *Firm Information* page as needed.
4. Click **Save Changes** to save the changes and continue, or click **Cancel Changes** to cancel any changes made.

The firm's information is updated on the *Firm Information* page, and the *Filings* page opens.

8 Technical Support Contact Information

For assistance, contact technical support through the following resources.

Resource	Contact Information
Support Hours	7:00 a.m. to 9:00 p.m. (CT), Monday through Friday
Support Chat	Assistance is also available online through Support Chat.
Email	support@efiletexas.gov
Telephone	855.839.3453
GoTo Assist (Support)	Support may ask to assist you by sharing your screen using GoToAssist.