eFileTexas.gov™

Individual Filer User Guide – Release 2017.1

Copyright and Confidentiality

Publishing History

Document Publication Number	Revision	Date	Changes Made
EFS-TF-200-4071 v.1	Initial	October 2017	Document Creation

Contents

1 System Overview

Topics Covered in this Chapter

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

This section lists the new features for Release 2017.1.

Note: Features vary based on your system configuration.

Addition of Party Demographics for Case Filings

The following new fields have been added to the *Parties* page:

- **Drivers License Type**
- **Drivers License State**
- **Drivers License Number**
- **Social Security Number**
- **Gender**
- **Interpreter**

Note: The new party demographic fields are configured by Tyler and may not be available on your system.

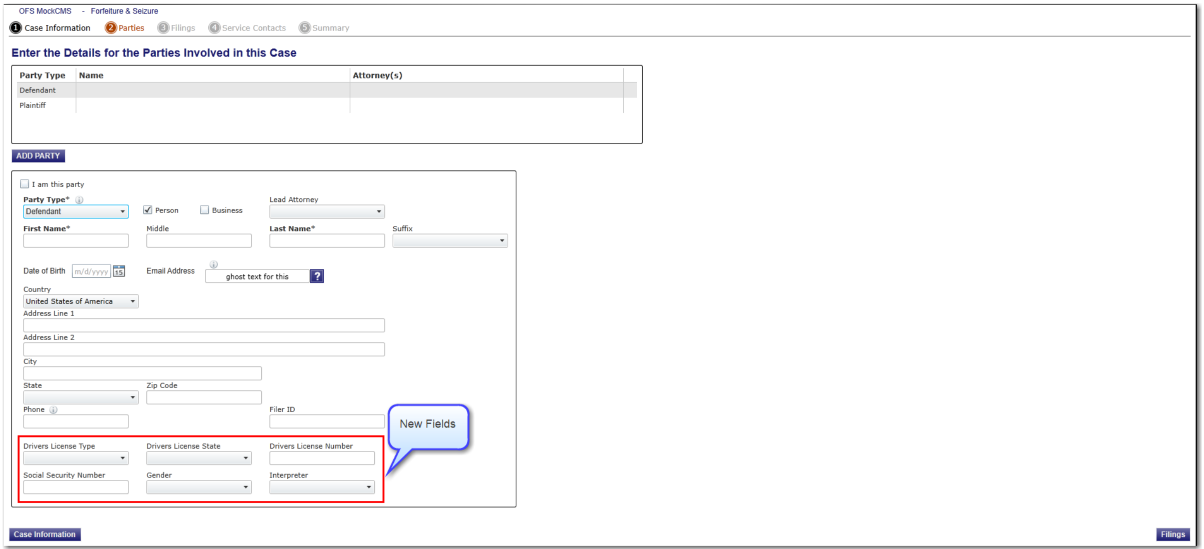


Figure 1.1 – Parties Page with New Fields

Addition of New Maximum Fees Field for Case Filings

The system now includes a new field in the **Payment** section called **Fees Not To Exceed**.

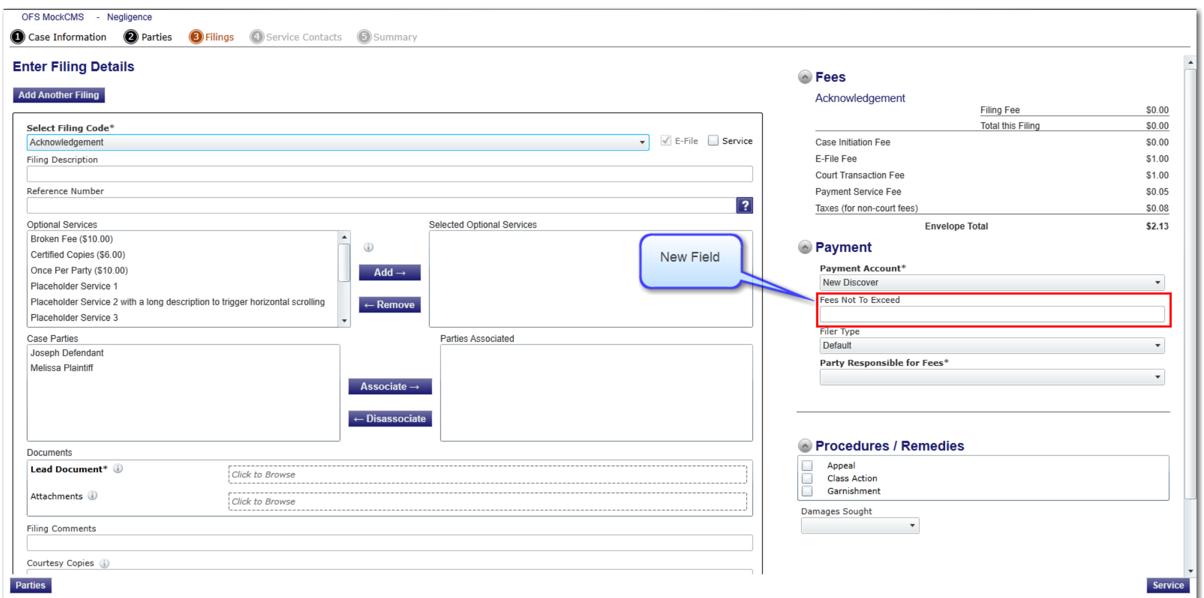


Figure 1.2 – Filings Page with the New Fees Not To Exceed Field

If, during the court review process, the Reviewer changes the filing so that the fees exceed the filer-specified maximum amount, the Reviewer will be notified, and the change will not be accepted.

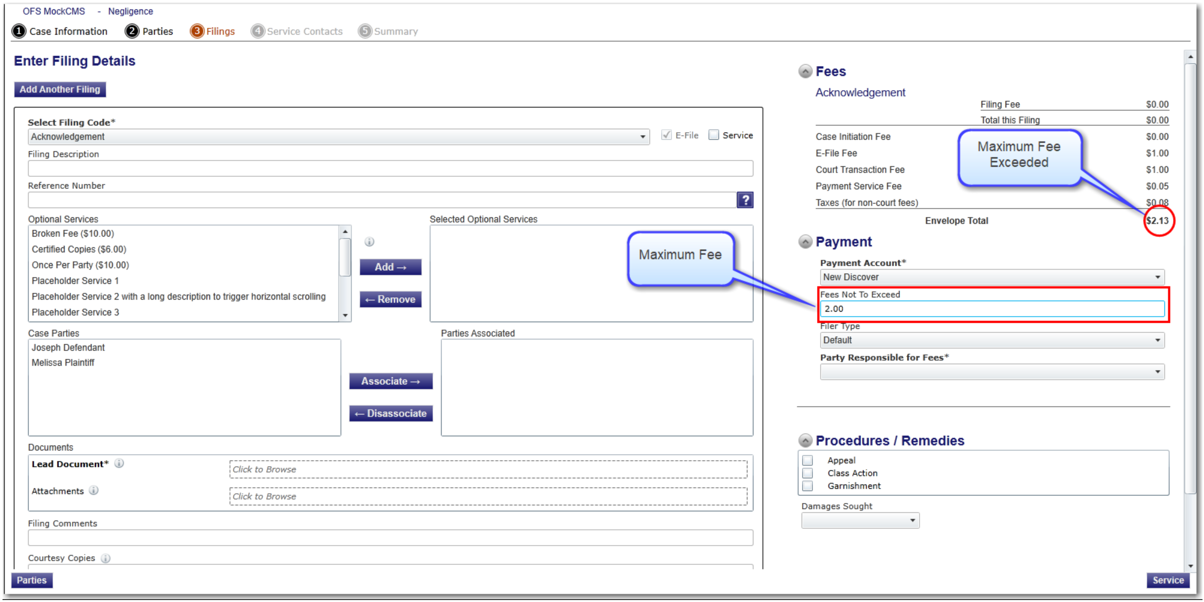


Figure 1.3 – Filings Page with the Maximum Fee Exceeded

Before You Begin

This guide is intended for individual filers (pro se/self-represented litigants).

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.

Prepare Your Case

This section describes the steps to successfully file and serve your case.

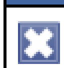
To e-file successfully, complete the following:

- Ensure that all documents are completed and signed.
- Convert all documents you plan to e-file into the PDF format.
- Check the court rules for required forms, pleadings, and other filings.
- Compile documents into a working directory for easy access while uploading to e-file.

Once the preceding steps are completed, proceed to the *Home* page to submit a filing transaction.

Filing Icons

Several icons are displayed during the file and serve process. The following table describes the different icons on the pages as you move around the application.

Icon	Description
	Deactivate the user, unbookmark the case, delete the party, delete a filing, delete a draft envelope, or delete a template.
	Manage your service contacts.

Icon	Description
	View the service contact, filing, or template details.
	File into the case.
	Bookmark the case.
	Resume the draft envelope.
	Cancel the filing.
	Copy the envelope or filing.
	Add a template to **My Favorites** folder.
	Edit a template in the workspace, or link a service contact to a case.
	View the attached case list.
	Replace service contacts.

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

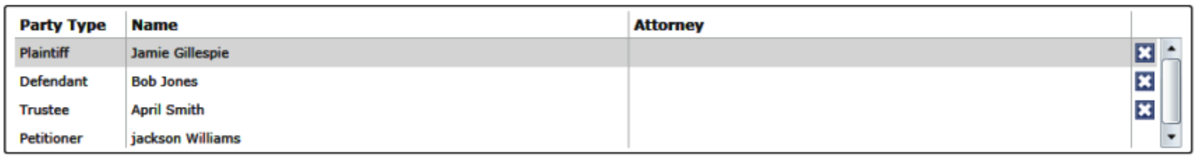
Breadcrumbs are a visual representation of the page you are currently on in the filing process. As you complete a page, the title of the next page illuminates to show where you are in the process.

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 1.4 – 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 1.5 – Data Table

Enter User Information

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

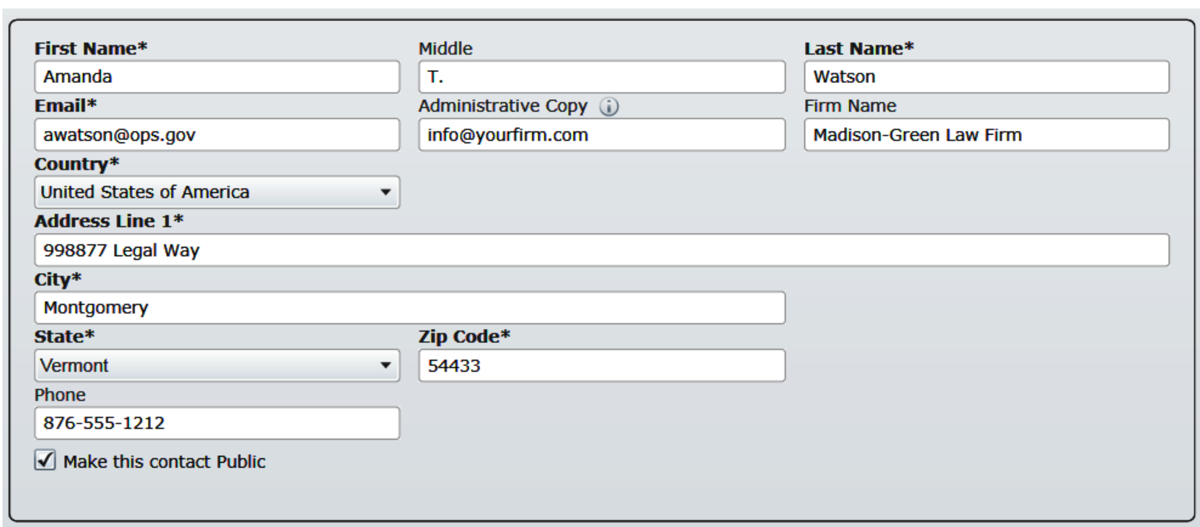


Figure 1.6 – Data Fields

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.

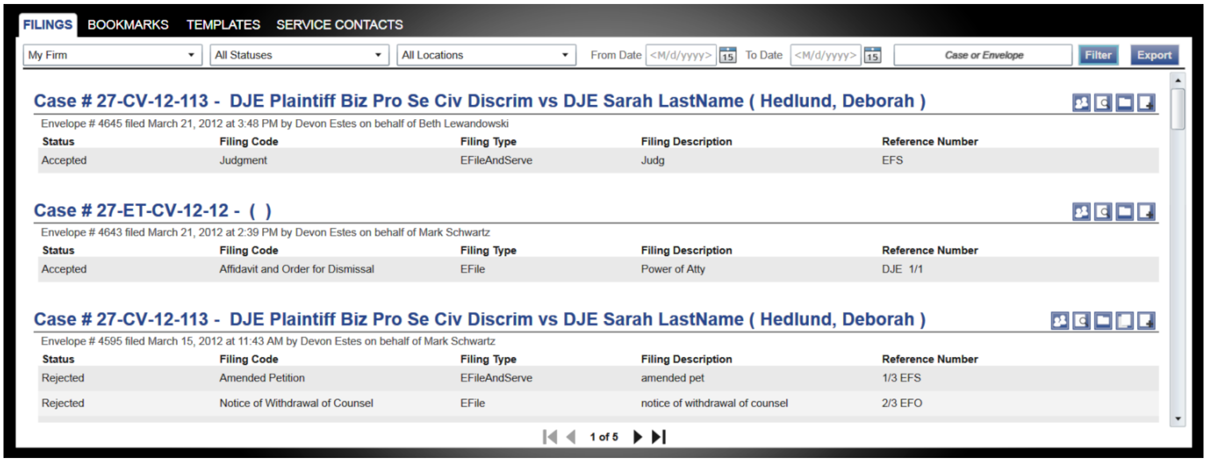


Figure 1.7 – Filings Page

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).

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.

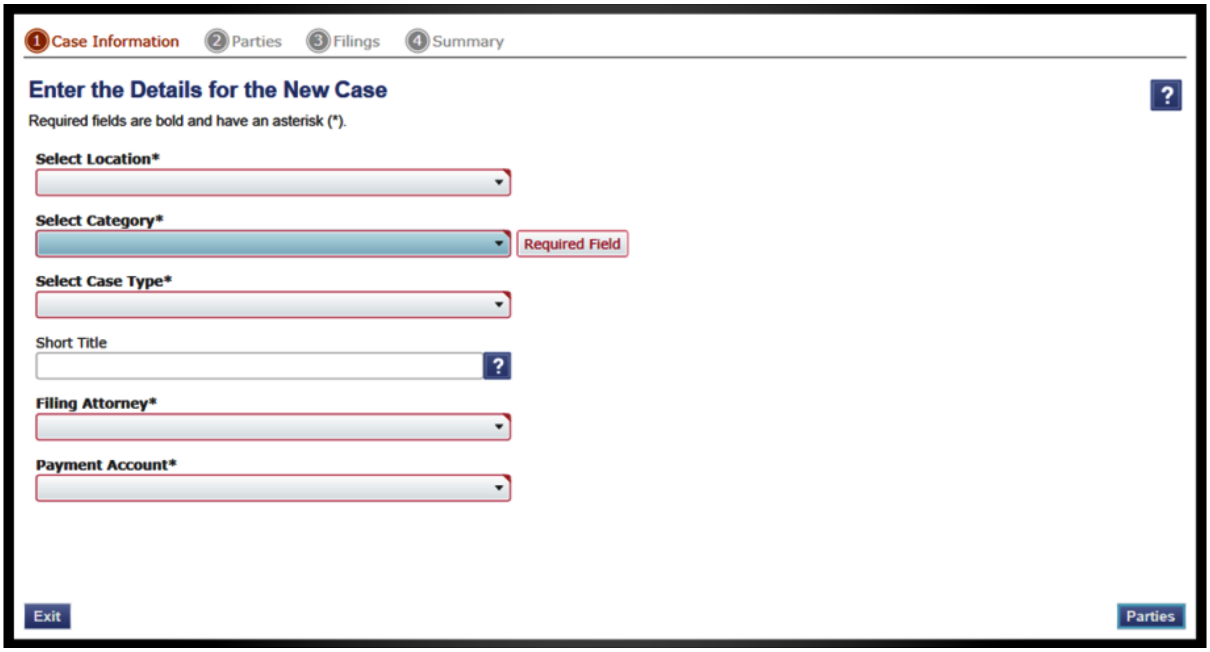


Figure 1.8 – Required Field Error Message

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.

Figure 1.9 – Invalid Entry Error Message

2 E-Filing Overview

Topics Covered in this Chapter

♦ Filing Queue Status

This section describes the e-filing process.

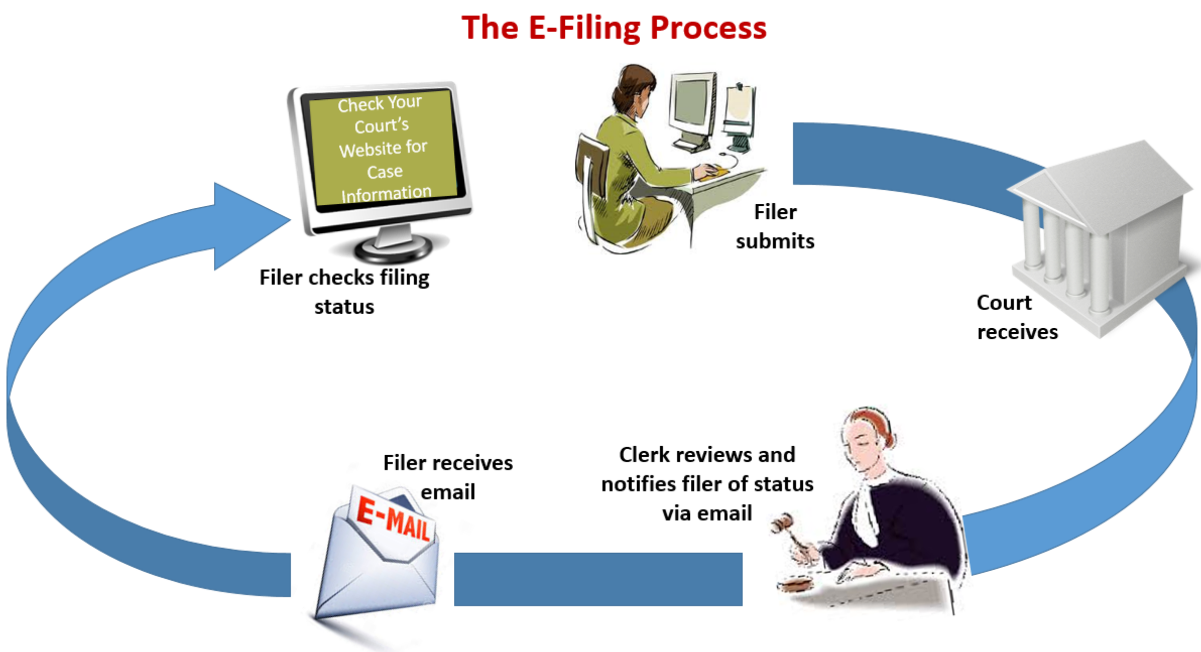


Figure 2.1 – The E-Filing Process

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.

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. **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.**
Receipted	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. **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 *Details* 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.

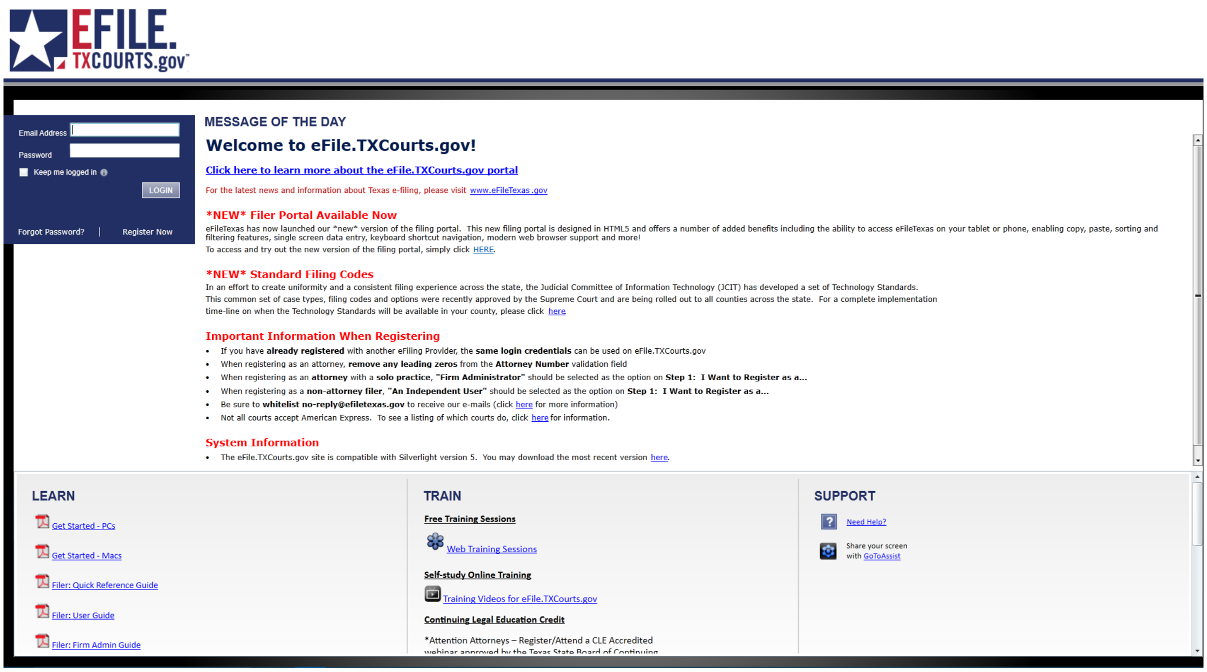


Figure 3.1 – eFileTexas.gov Home Page

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 an Independent User
♦ Resetting Your Password

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:

1. Click Register Now.

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

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

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

11. Type a response in the **Security Answer** field.
12. Click Register.

    The message `Your Registration is Complete` is displayed.

13. Click Finish.

    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?**.

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

Note: You can unlock your account by using the Forgot Password? option and resetting your password if a security question is associated with the account.

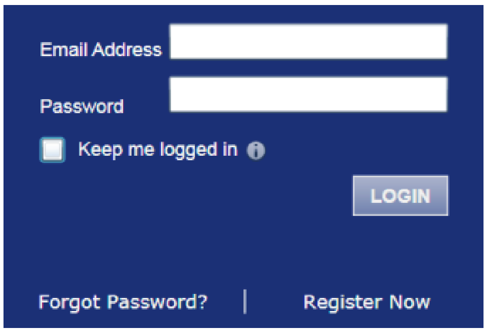


Figure 4.1 – Login Window

To reset your password, perform the following steps:

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

   The *Reset Password* window is displayed.

Figure 4.2 – Reset Password – Email Address

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

   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.

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.

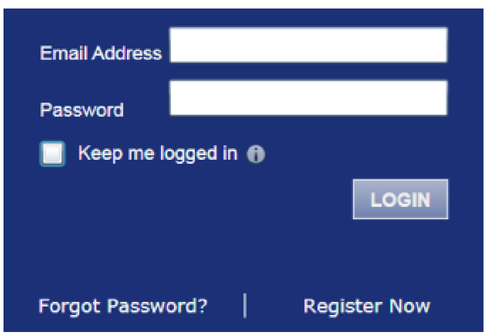


Figure 5.1 – Login Window

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.

   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.

   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.

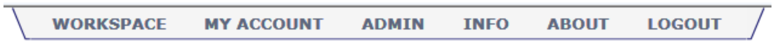


Figure 5.2 – Logout Link

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

6 Workspace

The workspace displays the links to access the *Filings*, *Bookmarks*, *Templates*, and *Service Contacts* pages.

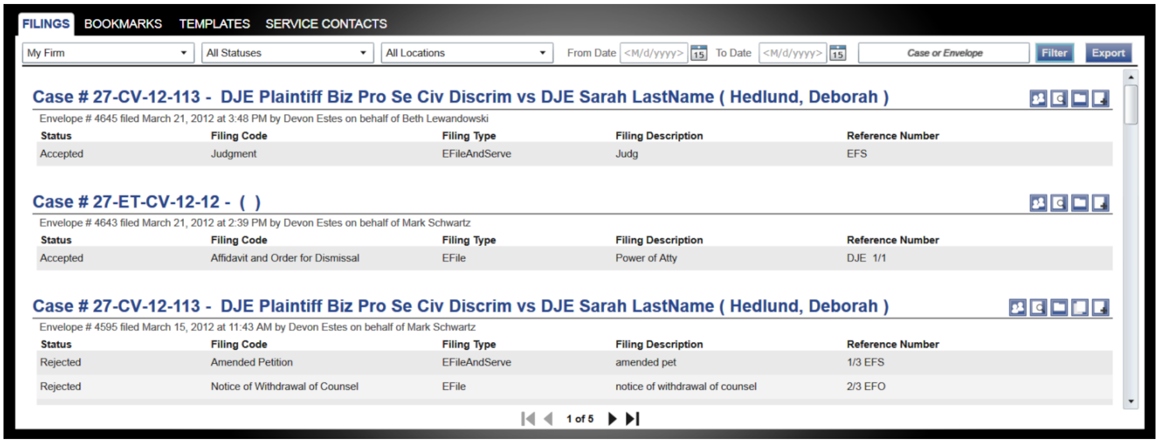


Figure 6.1 – Filings Page

Workspace

You can access the workspace after you have successfully logged in. Click WORKSPACE. The *Filings* page is displayed.

The workspace is used to view recent filings, manage templates, file into existing cases, manage case service contacts, bookmark cases, view the details of a case, copy the envelope to use in another filing, or cancel a filing (prior to court approval).

You can use the workspace to perform the following tasks:

New Case

Click **NEW CASE** to file a new case.

Case Search

To search for a case, select a location from the drop-down menu, and then type a case number in the **Case Number** field. Next, click Go. You can also search for a case by using the **Advanced Search** option.

Figure 6.2 – Case Search Options

Filings

You can use the *Filings* page to perform the following tasks:

- View the status of your filing.
- Check the filing type.
- Get a document description.
- See the number assigned to your case.

- View case details.
- Filter the filing queue.
- Add service contacts to a case.
- View the envelope details.
- Copy the envelope.
- Resume the filing process.

Bookmarks

The *Bookmarks* page displays a list of case numbers and descriptions for the cases you have bookmarked. Only you can see this information.

You can use the *Bookmarks* page to perform the following tasks:

- View a list of bookmarked cases.
- Refresh the cases list.
- Filter the cases list.
- File into an existing case.
- Remove a case from the bookmark list.
- Add service contacts to the bookmarked case.

Service Contacts

You can use the *Service Contacts* page to perform the following tasks:

- Add service contacts to a case.
- View service contact details.
- View the attached cases list.
- Replace service contacts on the case.
- Deactivate a service contact.

7 Templates

Topics Covered in this Chapter

Filers can establish and manage filing templates that simplify the filings for common parties, events, and documents when filing a new case.

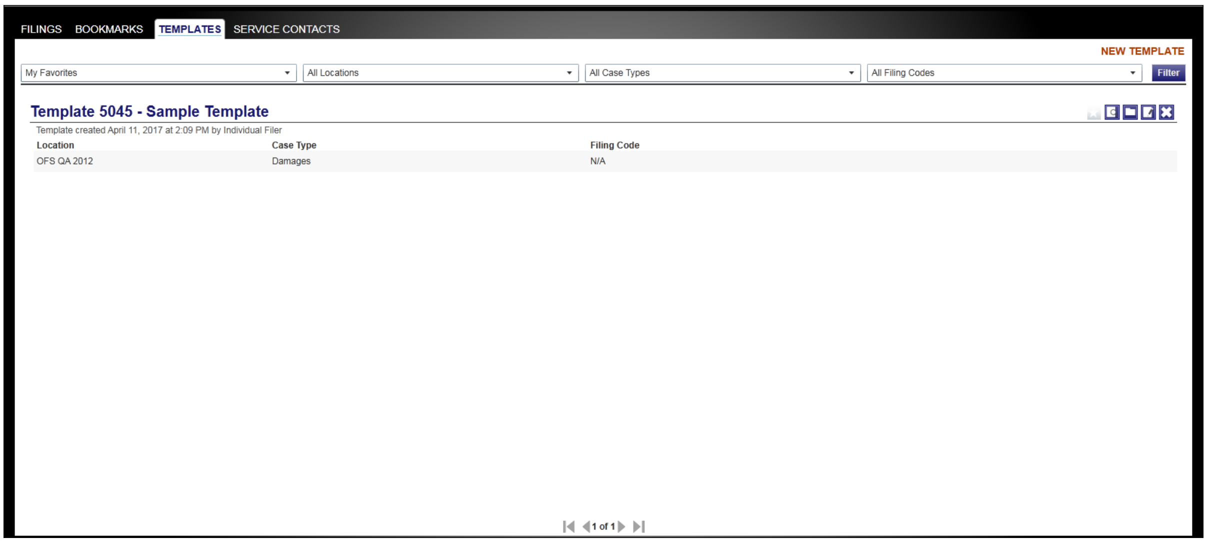


Figure 7.1 – Templates Page

On the *Templates* page, filers can create, manage, and use a filing template that was recently created.

When creating a new filing using a template, you can modify the information as needed for the particular filing. The modification does not affect the original template.

On the *Templates* page, you can perform the following tasks:

- Save commonly used templates to the **My Favorites** folder for easier access to the template.

  Note: When searching for a saved template, the Template Name field is the only required field.

- To view the templates saved in the **My Favorites** folder, select **My Favorites** from the drop-down list, and then click Filter.
- To select a location, use the drop-down list to filter by location, and then click Filter.
- To select a case type, use the drop-down list to filter by case types, and then click Filter.
- To select a filing code, use the drop-down list to filter by filing codes, and then click Filter.

- Click to add the template to your favorites.
- Click to view the template details.
- Click to file using an existing template.
- Click to edit the template.
- Click to delete the template.

Creating a Template

Filers can create templates that simplify the filings for common parties, events, and documents when filing a new case.

To create a template, perform the following steps:

1. Click WORKSPACE.

   The *Filings* page is displayed.
2. Click **Templates**.

   The *Templates* page is displayed.

Figure 7.2 – Templates Page

3. Click NEW TEMPLATE.

   The *Case Information* page is displayed.
4. Complete the fields on the *Case Information* page.

   Note: An asterisk indicates required fields.

Note: You must select a location from the Select Location drop-down list to ensure that you are able to select a case category, case type, payment account, party type, and filing code for the case.

5. Select the **Add as Favorite** check box to save the template to your favorites.
6. Click **Parties** to save the case information and continue.
7. Enter the details for the parties involved in the case.
8. Click **ADD PARTY** to add a new party to the case.
9. Complete the **Add Party** form.
10. Repeat step 9 to add another party to the case.
11. Click **Filings** to save and continue.
12. Enter the filing details for the case.
13. Click **Service** to save and continue.
14. Select the contacts to receive service for this envelope.
15. Click **Summary** to save and view a summary of the case.
16. Click **Complete Template** to submit the filing.

Editing a Template

Users can edit templates that have been created.

To edit a template, perform the following steps:

1. Click **Templates**.

   The *Templates* page is displayed.

Figure 7.3 – Templates Page

2. Select the template that you want to edit from the list.

3. Click the Edit Template ( ) icon.
4. Edit the pages of the template as needed.
5. Click Complete Template to save the template.

Deleting a Template

Users can delete templates that were previously created.

To delete a template, perform the following steps:

1. Click **Templates**.

   The *Templates* page is displayed.

Figure 7.4 – Templates Page

2. Select the template that you want to delete from the list.
3. Click the Delete Template ( ) icon.

   This action deletes the template and removes the template from the list.

8 Case Initiation

Topics Covered in this Chapter

- ♦ Filing a New Case
- ♦ Entering Party Details
- ♦ Entering Filing Details
- ♦ Setting the Maximum Fee Amount for a Filing
- ♦ Selecting Contacts to Receive Service
- ♦ Viewing the Case Summary

You can initiate a case by clicking NEW CASE.

Figure 8.1 – New Case Link

Click NEW CASE to open the *Case Information* page and to begin the case initiation process for e-filing.

Note: A payment account must exist before you can submit a filing.

Filing a New Case

You can file a new case by using the *Case Information* page.

A payment account must be set up prior to filing a new case.

To file a new case, perform the following steps:

1. Click NEW CASE.

Figure 8.2 – New Case Link

The *Case Information* page is displayed.

Note: An asterisk (*) indicates required fields.

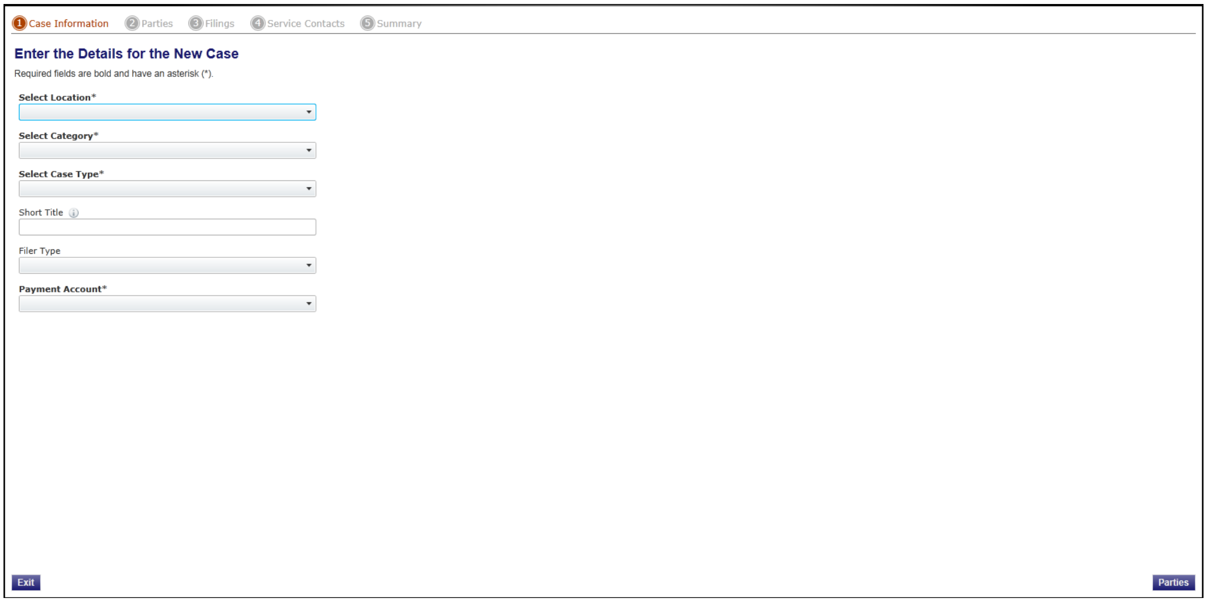


Figure 8.3 – Case Information Page

2. Select your court location from the **Select Location** drop-down list.
3. Select a case category from the **Select Category** drop-down list.
4. Select a case type from the **Select Case Type** drop-down list.
5. If you want, type a short title for the case in the **Short Title** field.
6. Select the filer type from the **Filer Type** drop-down list.
7. Select a payment account from the **Payment Account** drop-down list.
8. Click **Parties** to save the case information and continue.

Note: Once you click Parties, a draft of the pages where all of the required fields have been completed is automatically saved. This feature allows you to stop work on a filing and resume the filing at a later time. To resume filing a saved draft, click WORKSPACE, find your case on the *Filings* page, and click .

Entering Party Details

Each case requires a party type.

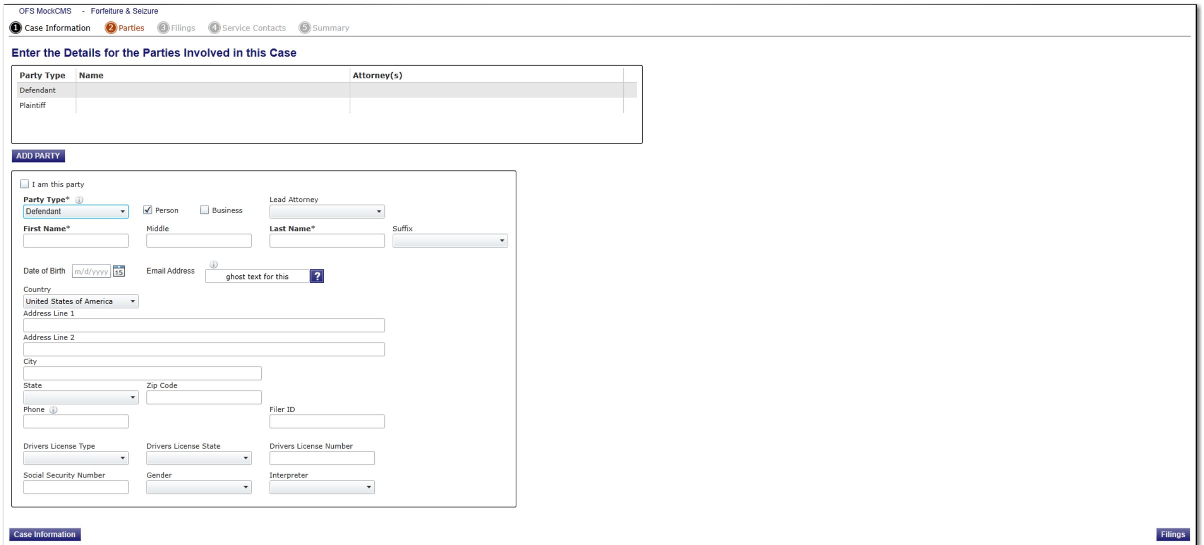


Figure 8.4 – Parties Page

To enter the details for the parties involved in the case, perform the following steps:

1. Click Parties on the *Case Information* page.
2. Select the I am this party check box to indicate you are the party.
3. Choose the party type from the list in the **Party Type** column. You can also select the party type from the **Party Type** drop-down list.

   Note: Defendant and Plaintiff are used as examples in the screen shot.
4. Select either the **Person** check box or the **Business** check box, as appropriate.
5. Select the attorney from the **Lead Attorney** drop-down list.
6. Click Close to close the page.
7. Type the party name in the fields provided.

   Note: An asterisk (*) indicates a required field.
8. Type the party's date of birth in the **Date of Birth** field, or click the date on the calendar.
9. Type the party's email address in the **Email Address** field.
10. Select the country from the **Country** drop-down list.

    Note: Foreign address fields are included to allow for non-U.S. addresses.

    Note the following details:

    - The following applies when the country listed is Canada:
      – The **State** field is displayed as **Province**.

- If provinces are configured, then the **Province** field consists of a drop-down list of Canadian codes; otherwise, the **Province** field consists of a free-form text box.
- The **City** field is displayed as **Municipality**.
- The **Zip Code** field is displayed as **Postal Code**.

- The following applies when you select other foreign countries:
  - The **State** field is displayed as **Region**.
  - If regions are configured, then the **Region** field consists of a drop-down list with region codes; otherwise, the **Region** field consists of a free-form text box.
  - The **City** field is displayed as **Municipality**.
  - The **Zip Code** field is displayed as **Postal Code**.

11. Complete the remaining address fields for the party.
12. Type the filer ID in the **Filer ID** field.

Note: The Filer ID field is configured by Tyler and may not be available on your system.

13. Select the party's driver's license type from the **Drivers License Type** drop-down list.

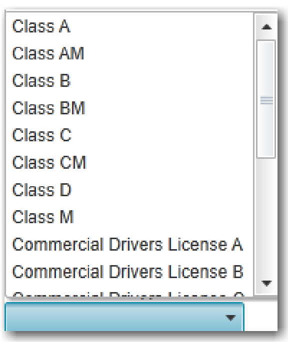


Figure 8.5 – Drivers License Type Drop-Down List

14. Select the state where the party's driver's license was issued from the **Drivers License State** drop-down list.

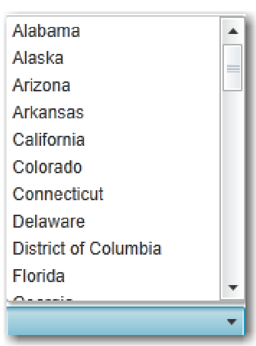


Figure 8.6 – Drivers License State Drop-Down List

15. Type the party's driver's license number in the **Drivers License Number** field.
16. Type the party's Social Security number in the **Social Security Number** field.
17. Select the party's gender from the **Gender** drop-down list.

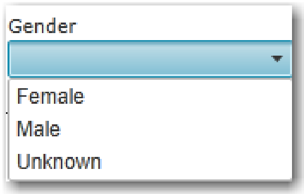


Figure 8.7 – Gender Drop-Down List

18. If an interpreter is needed, select the language from the **Interpreter** drop-down list.

Figure 8.8 – Interpreter Drop-Down List

19. If you want to add another party to the filing, click **ADD PARTY**, and enter the party information in the required fields.

   Note: When more than 100 parties are on a case, only the first party of each required party type will be displayed, along with a message that additional parties are not displayed due to system constraints.

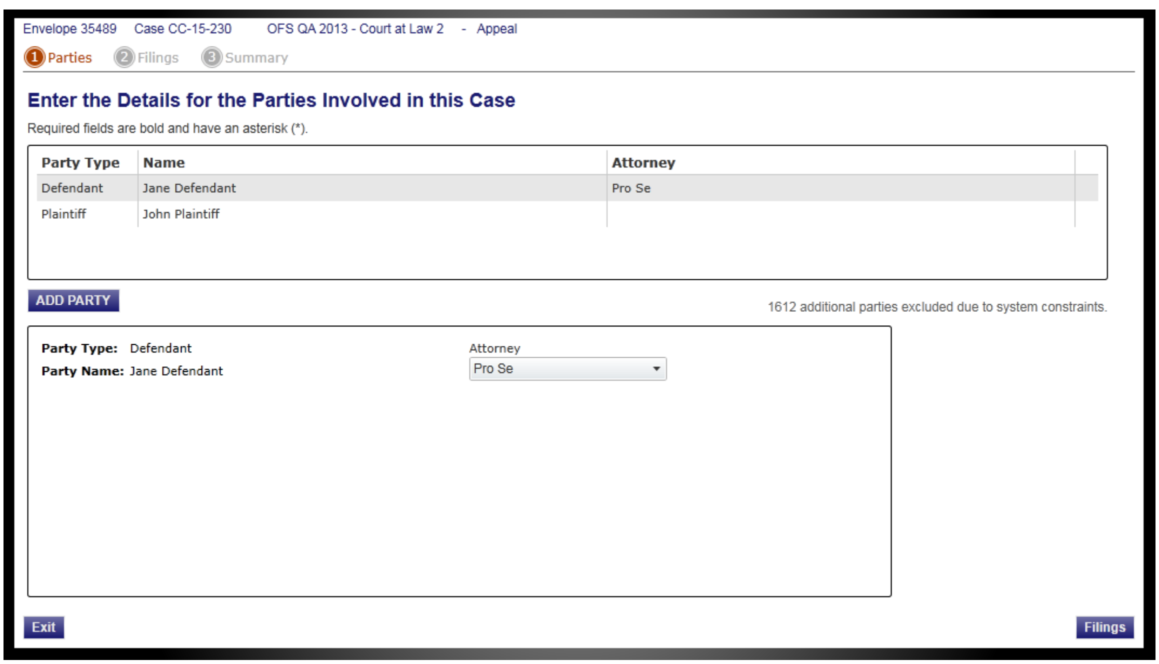


Figure 8.9 – Sample of Parties Page for Cases with More Than 100 Parties

20. Click **Filings** to save the party details, or click **Case Information** to display the previous page.

Entering Filing Details

The *Filing Details* page allows you to enter the filing details and calculate the fees associated with the filing. To enter the filing details for the case, perform the following steps:

1. Click **Filings** on the *Parties* page to enter the filing details.

   The *Filings* page is displayed.

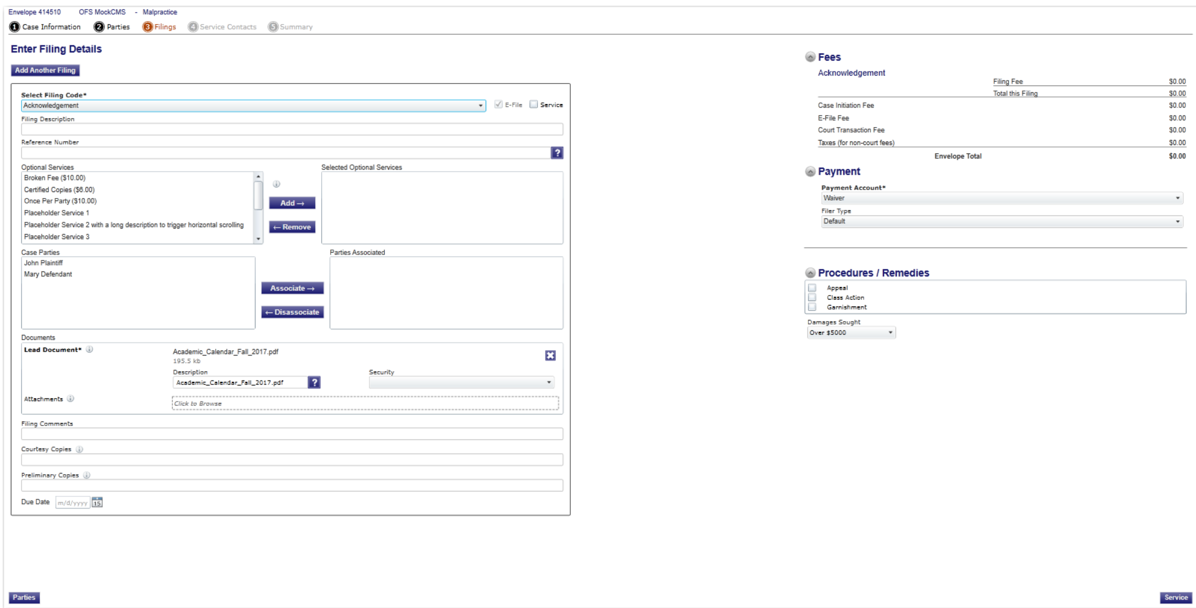


Figure 8.10 – Filings Page

2. Select the filing code from the **Select Filing Code** drop-down list.
3. Select the **E-File** check box to electronically file the case.
4. Select the **Service** check box to electronically serve the case.
5. Enter a brief description in the **Filing Description** field of the filing associated with the filing code previously selected.
6. In the **Reference Number** field, type the reference number of your choice that you can refer back to for this filing.

   Note: A reference number is a customer-created number and is for internal purposes only. Most courts do not see or refer to the Reference Number field for the filing. This is an optional field.
7. Select the parties to associate or disassociate with the case.
8. Select the lead document for this filing, as follows:

   a. Click Click to Browse to select and upload a lead document.

      This action opens Windows Explorer on your computer.

   b. From the list of files, select a document to upload.

      Note: Only one document can be uploaded as a lead document.

   c. Click Open to attach the file.

Note: The maximum length for a document description is 40 characters.

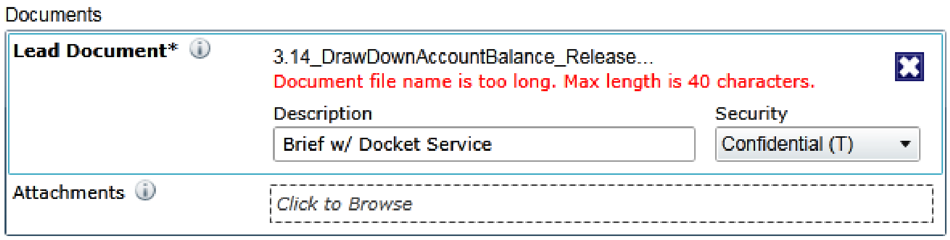


Figure 8.11 – Document File Name Error

d. Wait as the attachment uploads.

Note: Click to delete the uploaded attachment.

e. Type a description of the uploaded attachment in the **Description** field.

f. Select a security option for the attachment.

9. From the list of files, select the attachments to upload for this filing, as follows:

a. Click **Add More Documents** to select an attachment.

This action opens Windows Explorer on your computer.

b. From the list of files, select the attachments to upload.

Note: Multiple documents can be uploaded as attachments simultaneously.

Note: The system provides a way to upload a file type that is not converted into PDF format. Users can download and view the files externally by using the RTF document format.

Note: The Auxiliary Filing feature enables filers to upload an editable RTF version of a document to the court. For example, many courts require documents to be in PDF format; however, a judicial officer may want an editable version of the document sent to the court so that the document can be modified in the Proposed Orders. As a result, the filer would submit both the PDF and RTF versions of the same document. The RTF version is used only if the judge is making changes to the filing.

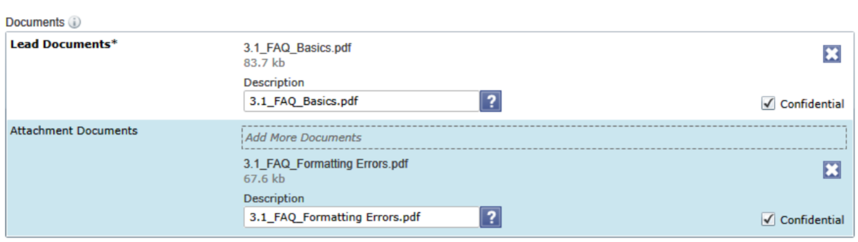


Figure 8.12 – Uploading an Attachment

c. Click Open to attach the file.

d. Wait as the attachment uploads.

Click to delete the uploaded attachment.

e. Type a description of the uploaded attachment.

f. Select a security option for the attachment.

10. Type the filing comments for the court reviewer to read in the **Filing Comments** field.
11. In the **Courtesy Copies** field, type the email addresses of the parties to receive courtesy copies of this filing.
12. In the **Preliminary Copies** field, type the email addresses of the parties to receive preliminary copies of this filing.
13. Click 15 to select a due date.
14. Review the filing fees.

Note: Your credit card is authorized when it is submitted; however, the transaction fees will not post to the credit card account until the court accepts the filing. Once the filing is accepted, the total filing fee to be submitted for the filing is displayed.

15. From the **Payment Account** drop-down list, select a payment account to pay the filing fees.
16. From the **Filer Type** drop-down list, select a filer type for the payment account used to pay the filing fees.
17. From the **Party Responsible for Fees** drop-down list, select the party responsible for the filing fees.

Note: If the payment account selected is Waiver, the Party Responsible for Fees field may not be displayed.

18. Select the **Procedures/Remedies** check boxes for this filing.

Figure 8.13 – Procedures/Remedies Section

19. From the **Damages Sought** drop-down list, select the damages sought for this filing.
20. To add another filing to the case, click Add Another Filing, and enter the filing details in the required fields.
21. Click Service to save the filing details when you are done, or click Parties to return to the previous page.

Calculating Multiple Fees

The system requires the user to enter a fee multiplier value for optional services, and then the system confirms the value entered before submitting a filing.

Figure 8.14 – Fee Calculation Table

To calculate multiple fees, perform the following steps:

1. From the drop-down list, select a filing code with a listed optional service.
2. Enter the number of services or copies needed.
3. Click **Ok** to calculate the multiple fees and return to the *Filings* page.

Setting the Maximum Fee Amount for a Filing

Filers can specify the maximum amount that fees associated with a filing should not exceed. Filers enter the amount in the **Fees Not To Exceed** field in the **Payment** section of a filing. If, during the court review process, the Reviewer changes the filing so that the fees exceed the filer-specified maximum amount, the Reviewer will be notified, and the change will not be accepted.

Note: The Fees Not To Exceed field is configured by Tyler and may not be available on your system.

To set the maximum fee amount for a filing, perform the following steps:

1. Click NEW CASE.
2. Complete the required fields on the *Case Information* page.
3. Click Parties to save the case information and continue.

4. Complete the required fields on the *Parties* page.

5. Click **Filings** to save the party details and continue.

   The *Filings* page is displayed.

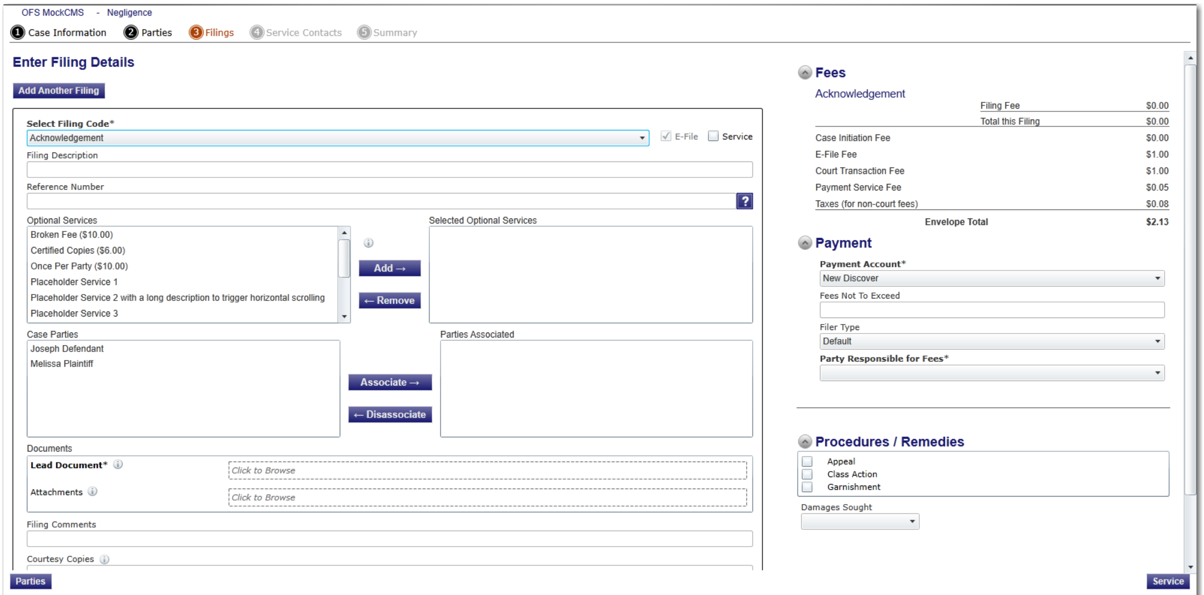


Figure 8.15 – Filings Page

6. Select the filing code from the **Select Filing Code** drop-down list.
7. Select the **E-File** check box to electronically file the case.
8. Select the **Service** check box to electronically serve the case.
9. Enter a brief description in the **Filing Description** field of the filing associated with the filing code that you previously selected.
10. In the **Reference Number** field, type the reference number of your choice that you can refer back to for this filing.

    Note: A reference number is a customer-created number and is for internal purposes only. Most courts do not see or refer to the Reference Number field for the filing. This is an optional field.

11. Select the parties to associate or disassociate with the case.
12. Select the lead document for this filing, as follows:

    a. Click *Click to Browse* to select and upload a lead document.

       This action opens Windows Explorer.

    b. From the list of files, select a document to upload.

       Note: Only one document can be uploaded as a lead document.

    c. Click **Open** to attach the file.

    d. Wait as the attachment uploads.

    e. Type a description of the uploaded attachment in the **Description** field.

f. From the list, select a security option for the attachment.

13. From the list of files, select the attachments to upload for this filing, as follows:

    a. Click **Add More Documents**.

       This action opens Windows Explorer.

    b. From the list of files, select the attachments to upload.

       Note: Multiple documents can be uploaded as attachments simultaneously.

       Note: The system provides a way to upload a file type that is not converted into PDF format. Users can download and view the files externally by using the RTF document format.

       Note: The Auxiliary Filing feature enables filers to upload an editable RTF version of a document to the court. For example, many courts require documents to be in PDF format; however, a judicial officer may want an editable version of the document sent to the court so that the document can be modified in the Proposed Orders. As a result, the filer would submit both the PDF and RTF versions of the same document. The RTF version is used only if the judge is making changes to the filing.

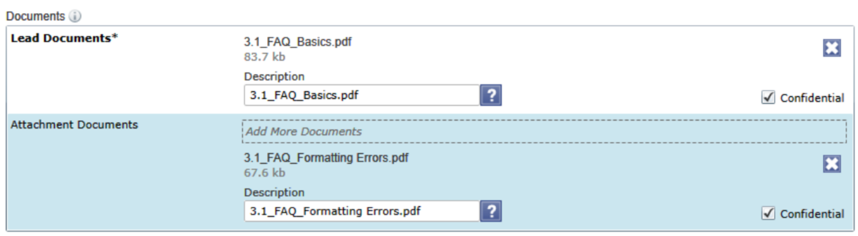


Figure 8.16 – Uploading an Attachment

    c. Click Open to attach the file.

    d. Wait as the attachment uploads.

    e. Type a description of the uploaded attachment.

    f. From the list, select a security option for the attachment.

14. In the **Filing Comments** field, type the filing comments for the court reviewer to read.

15. In the **Courtesy Copies** field, type the email addresses of the parties that are to receive courtesy copies of this filing.

16. In the **Preliminary Copies** field, type the email addresses of the parties that are to receive preliminary copies of this filing.

17. Click 15 to select a due date.

18. Review the filing fees.

    Note: Your credit card is authorized when it is submitted; however, the transaction fees will not post to the credit card account until the court accepts the filing. Once the filing is accepted, the total filing fee to be submitted for the filing is displayed.

19. From the **Payment Account** drop-down list, select a payment account to pay the filing fees.

20. Type an amount in the **Fees Not To Exceed** field.

    Note: The amount that you enter in this field is a filer-specified amount. If the filing fees exceed this amount, the user will receive an error message and will not be allowed to continue with the filing until the error is corrected.

21. Select a filer type for the payment account used to pay the filing fees from the **Filer Type** drop-down list.
22. Select the party responsible for the filing fees from the **Party Responsible for Fees** drop-down list.
23. Click Service to save the filing details when you are done.

Selecting Contacts to Receive Service

The *Service Contacts* page allows you to select the contacts that you want to receive service for the case.

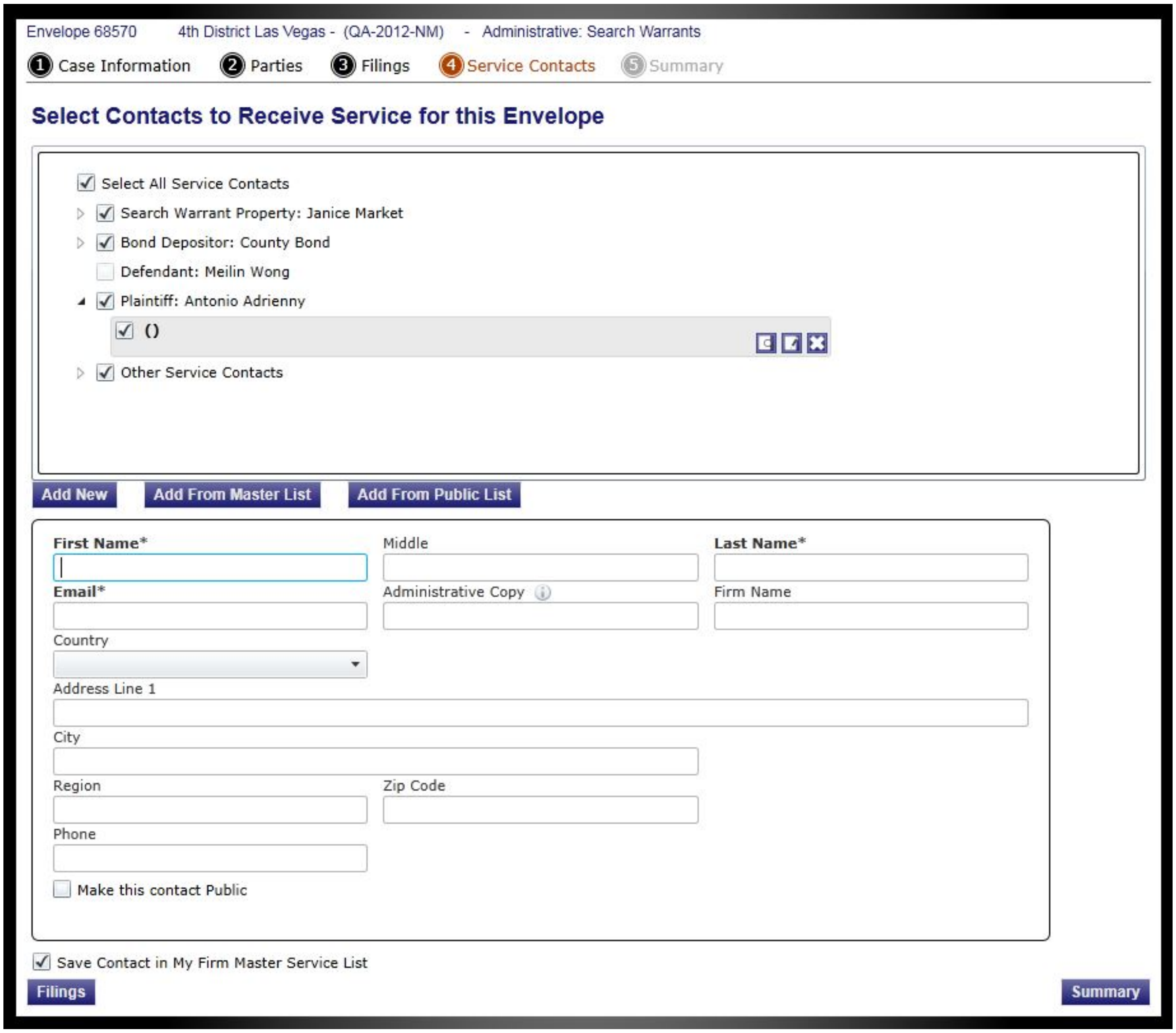


Figure 8.17 – Service Contacts Page

To select the service contacts to receive service, perform the following steps:

1. Click Service on the *Filings* page to select the service contacts.
2. Select the check box next to the name of the service contact to add to the case, or click Add New to add a new service contact.

The fields required to add a service contact are displayed.

3. Complete the **Add Service Contact** form by providing the applicable information.

   Note: An asterisk (*) indicates required information.

4. Type an email address in the **Administrative Copy** field.

   The administrative email is an optional additional email for the delivery of service. Delivery to this address is not considered a determining factor for the completion of e-service.

5. Select the **Make this contact Public** check box to make the contact public.
6. Select the **Save Contact in My Firm Master Service List** check box to save the contact to the firm's master service list.
7. Click Save to save the contact.
8. Select the check boxes next to the service contact names that you want to receive service.
9. Click Summary to save the selected contact and view the case summary, or click Filings to return to the previous page.

Viewing the Case Summary

The *Summary* page displays the case information, parties involved in the case, filing details, fees, payments, and filing attorney for the case.

The *Parties* and *Filings* pages must be complete before you can view the case summary. A payment account must be assigned to the case to complete the filing process.

To view the case summary, perform the following steps:

1. Click Summary on the *Filings* page to view the case summary.

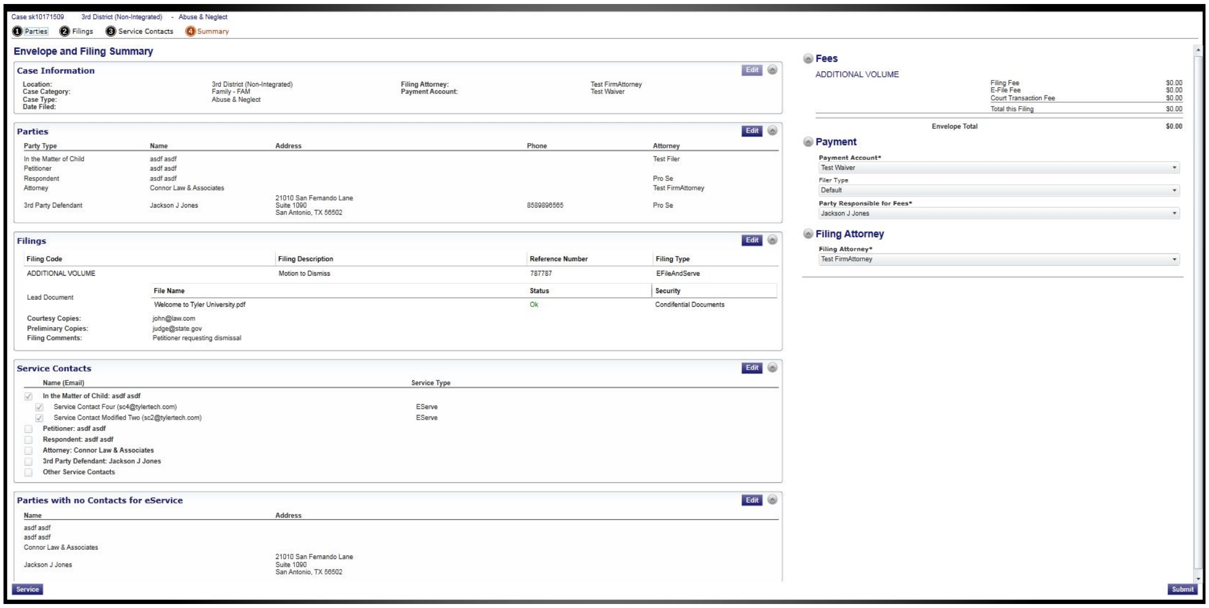


Figure 8.18 – Envelope and Filing Summary Page

The *Envelope and Filings Summary* page is displayed. Here, you can view the case information, the parties involved in the case, the service contacts, the filing codes, the filing fees, the payment accounts, and the filing attorney for the case.

Note: The system prevents users from changing an envelope that has already been submitted.

2. Click **Submit** to submit your filing, or click **Filings** to take you back to the *Filings* page.

9 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 9.1 – 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 

.

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

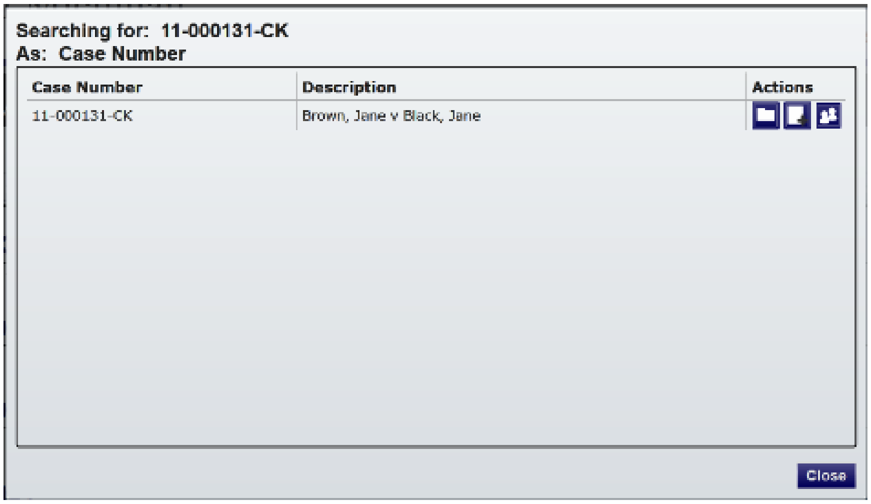


Figure 9.2 – Case Search Results

4. 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:

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

   The *Advanced Search* dialog box opens.

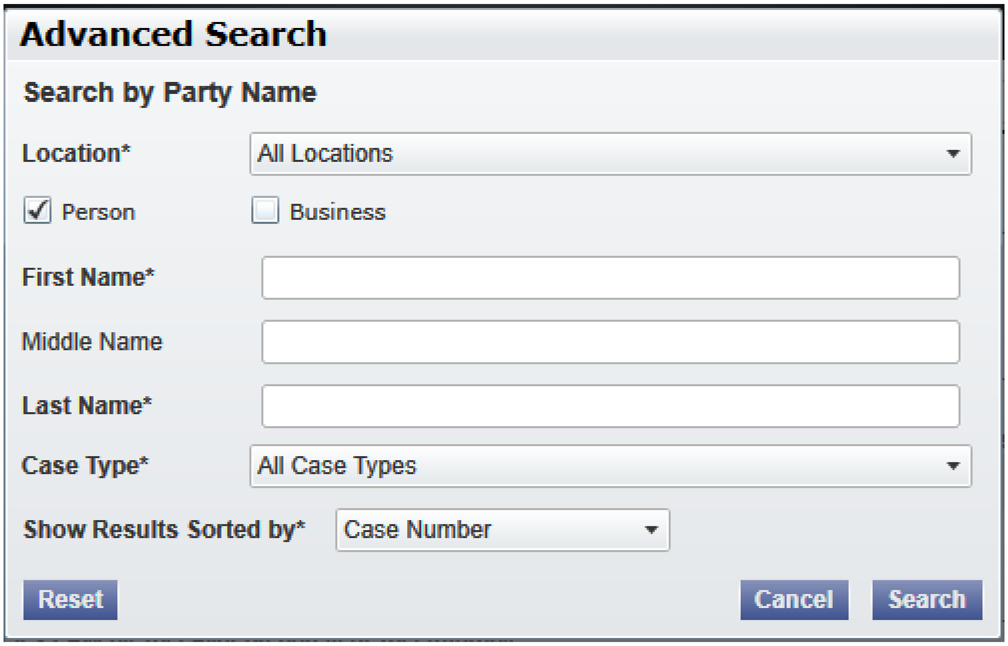


Figure 9.3 – Advanced Search Dialog Box

2. Select the **Person** 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.

Performing an Advanced Search by Business

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

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

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.

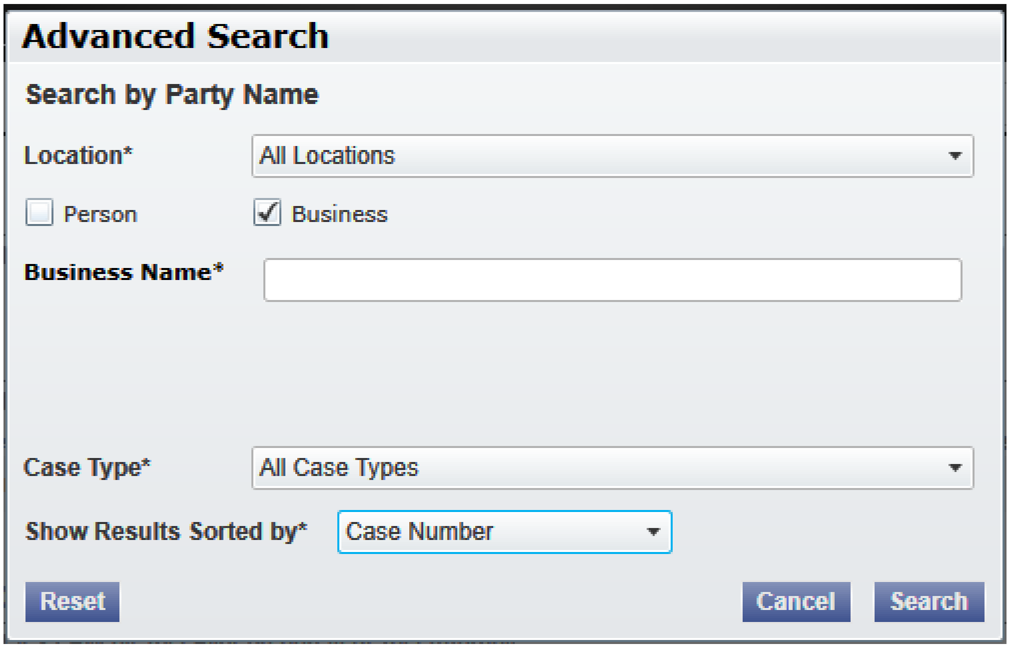


Figure 9.4 – Advanced Search Dialog Box

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.

10 Subsequent Filing

Topics Covered in this Chapter

♦ Filing into an Existing Case
♦ Filing Into a Case Through Case Search
♦ Filing Into a Case Not Listed
♦ Filing an Appeal to an Existing Case

Once a new case has been created by the courts, you can file into the existing case. Filing into an existing case is also called subsequent filing.

Filing into an Existing Case

You can file into an existing case once you have initiated a case.

Note: The system does not allow subsequent filing into cases that have not been accepted by the court.

To access your case to begin a subsequent filing, perform the following steps:

1. Click WORKSPACE.

   The *Filings* page is displayed.

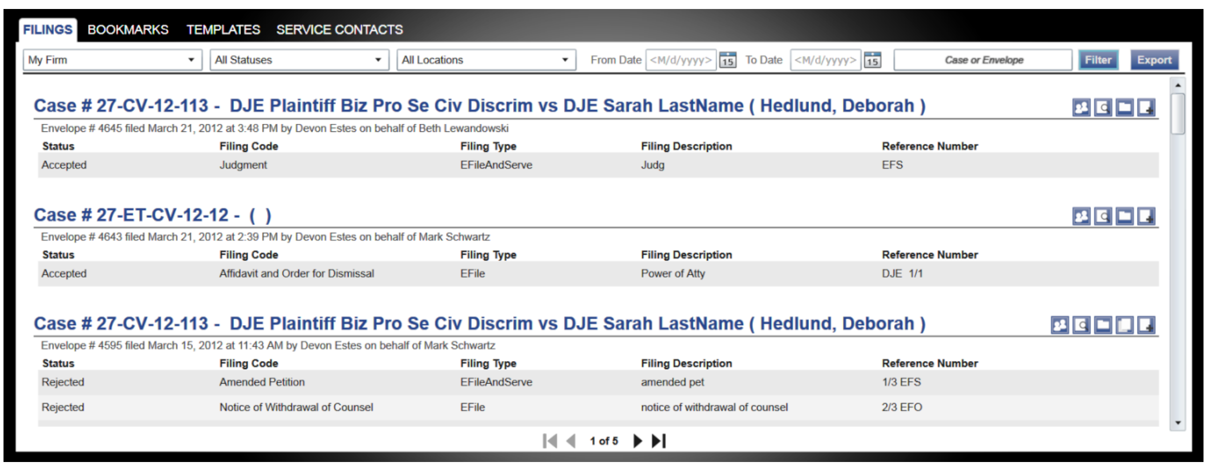


Figure 10.1 – Filings Page

2. Locate your case on the *Filings* page.
3. Click  to file into the case.
4. Enter the details for the parties involved in the case.

   Note: The courts can prevent users from adding new parties on subsequent filings.

5. Click Filings to save your entries and continue.
6. Enter the filing details for the case.

A filer is required to resubmit documents when changing a filing code.

Note: An error message is displayed instructing the filer to resubmit documents if the current filing code has changed.

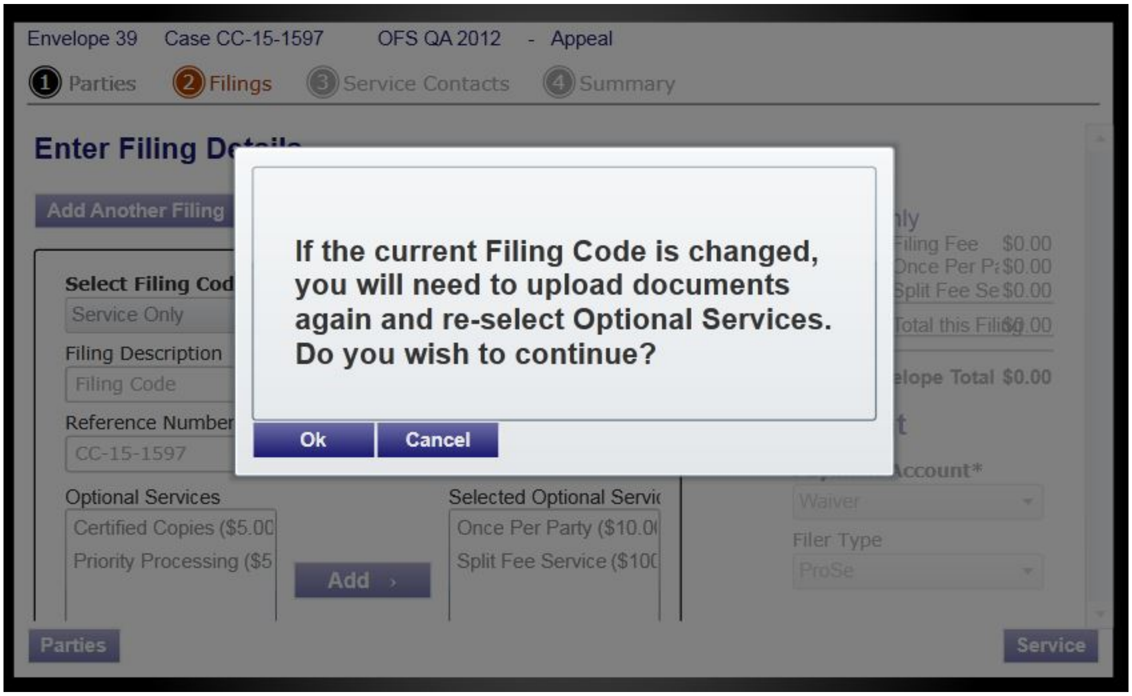


Figure 10.2 – Filing Code Error Message

7. Click Service to save your entries and continue.
8. Select the contacts to receive service for this envelope.
9. Click Summary to save your entries and view a summary of the case.
10. Click Submit to submit the filing.

Filing Into a Case Through Case Search

Filers can search for a case using the **Case Search** option and initiate a subsequent filing for cases that are found.

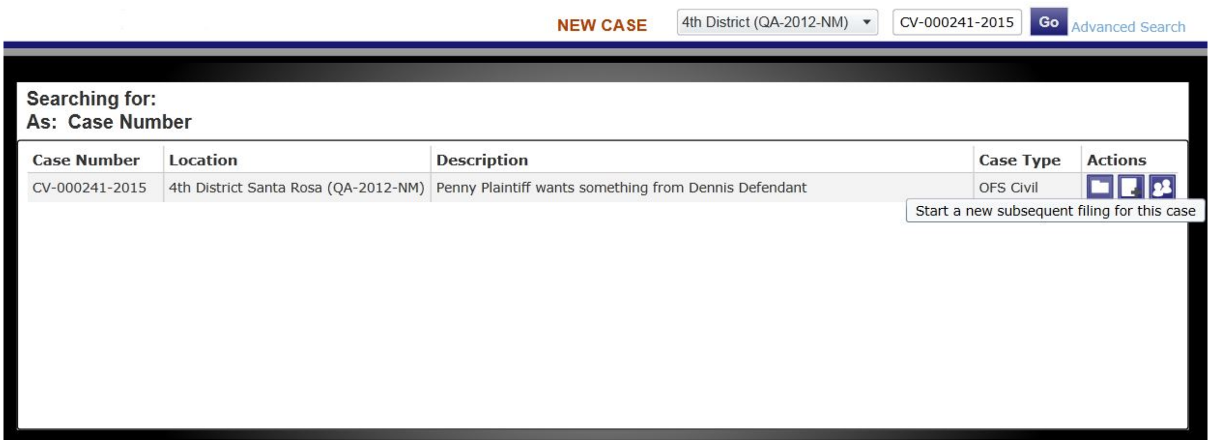


Figure 10.3 – Case Search Results

To file into a case found in the search results, perform the following steps:

1. Select a location from the drop-down list.
2. Type a case number in the **Case Number** search field.
3. Click .

   The system displays the search results.
4. Locate the case that you want to file into on the list.

   Note: The system no longer allows subsequent filing into cases that have not been accepted by the court.

5. Click .

   The filing process begins.

Filing Into a Case Not Listed

Filers can submit subsequent filings for cases that are not yet indexed in locations that use a non-bidirectional case management system integration. This feature allows users who cannot locate a case because it is not part of the case index to file into the case as if it were found using the **Case Search** option.

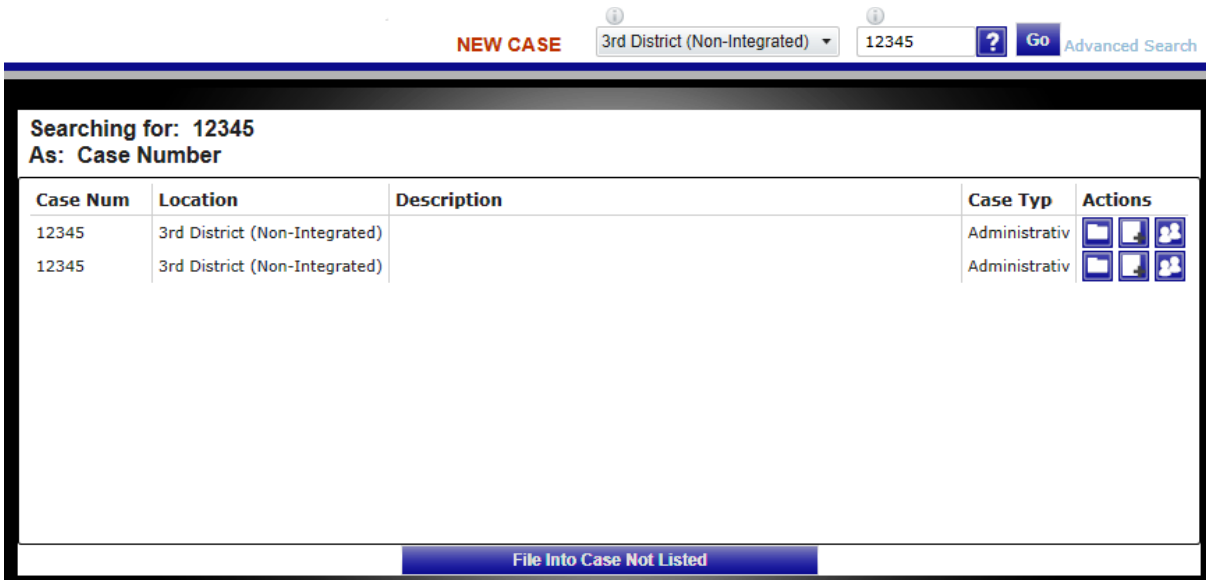


Figure 10.4 – Case Search Results

To file into a case not listed in the search results, perform the following steps:

1. Select a location from the drop-down list.
2. Type a case number in the case number search field.
3. Click **Go**.

   The system displays an error message stating that the case was not found.
4. Click **File Into Case Not Listed**.

Filing an Appeal to an Existing Case

Note: The Appellate option is configured by Tyler and may not be available on your system.

To file an appeal to an existing case by using the Appellate option, perform the following steps:

1. Click .

Figure 10.5 – New Case Link

The *Case Information* page is displayed.

Note: An asterisk (*) indicates required fields.

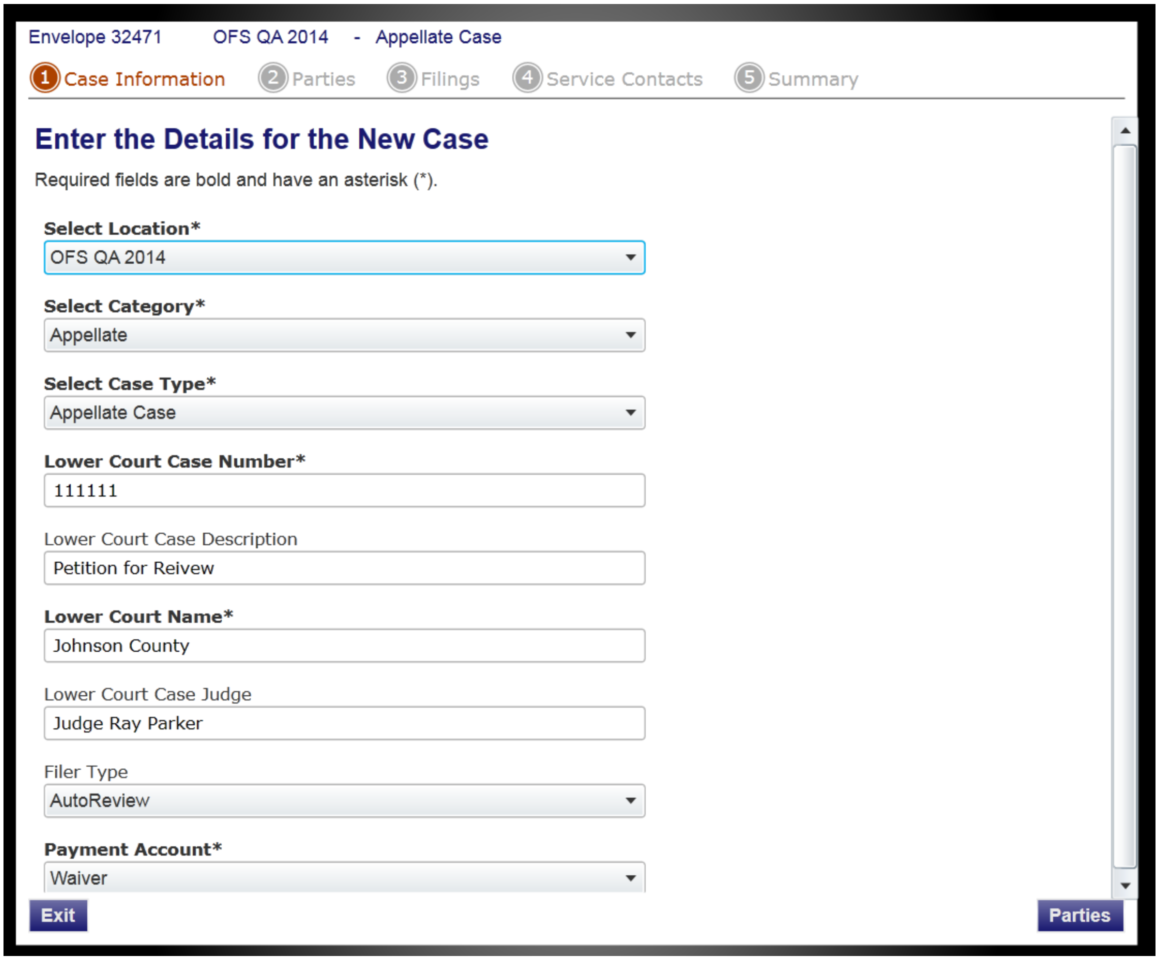


Figure 10.6 – Case Information Page

2. Select your court location from the **Select Location** drop-down list.
3. Select **Appellate** from the **Select Category** drop-down list.
4. Select **Appellate Case** from the **Select Case Type** drop-down list.
5. Type the original case number in the **Lower Court Case Number** field.

   Note: A lower-court case number is required to file an appeal.
6. Type a description of the original case in the **Lower Court Case Description** field.
7. Type the name of the lower court in the **Lower Court Name** field.

   Note: A lower-court name is required to file an appeal.
8. Type the name of the lower-court case judge in the **Lower Court Case Judge** field.
9. Select the filer type from the **Filer Type** drop-down list.
10. Select a payment account from the **Payment Account** drop-down list.
11. Click 

 to save the case information and continue.

11 My Account

Topics Covered in this Chapter

Click **My Account** to access the *Change Password*, *Payment Accounts*, *My Information*, and *Manage Notifications* pages.

You can change your password and your security question on the *Change Password* page.

You can add or update a payment account on the *Payment Accounts* page.

You can update your user and contact information on the *My Information* page.

You can manage the email notifications that you want to receive on the *Manage Notifications* page.

Changing the User Password

You can change your password on the *Change Password* page.

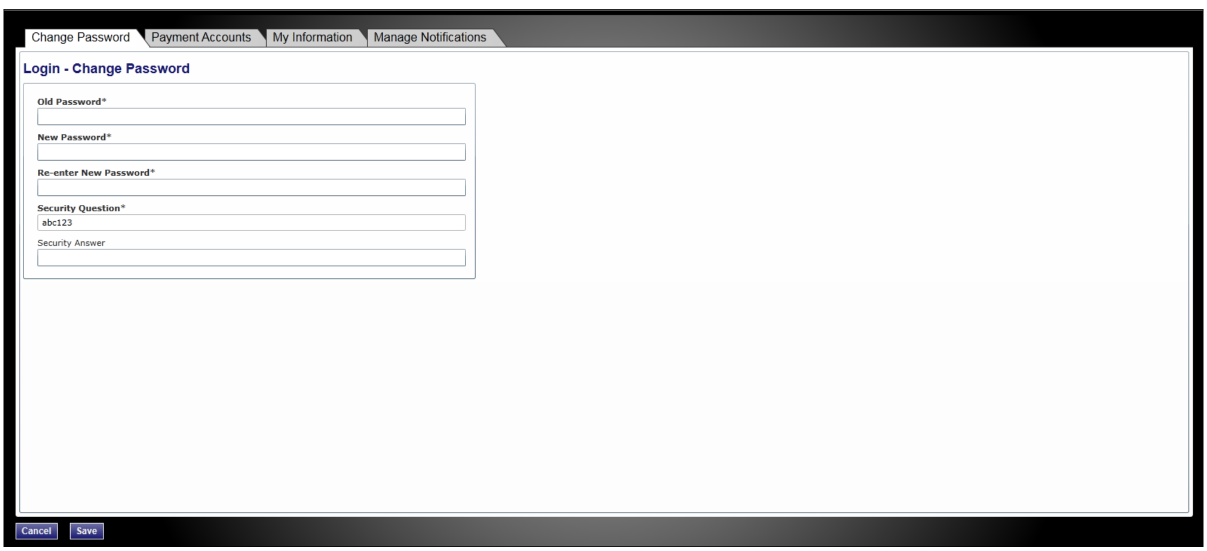


Figure 11.1 – Change Password Page

Note: Your password is case-sensitive and must be at least six characters in length.

To change the user password, perform the following steps:

1. Click MY ACCOUNT.

   The *Change Password* page is displayed.
2. Complete the required fields.

Note: You can unlock your account by using the Forgot Password? option.

3. Click Save to change your password, or click Cancel to exit without changing your password.

Changing the Security Question

You can change your security question on the *Change Password* page.

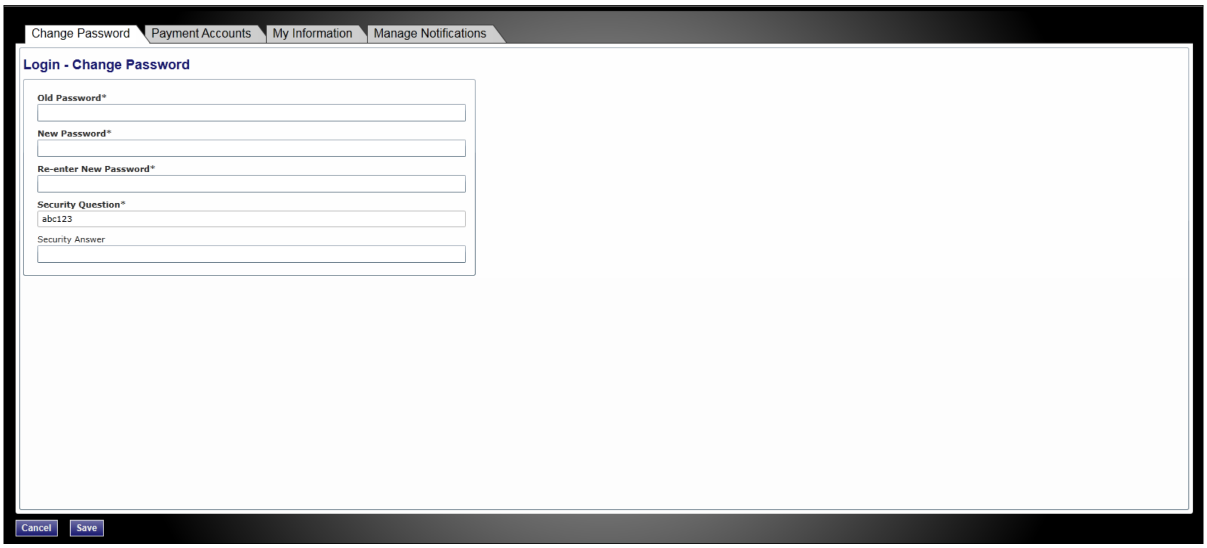


Figure 11.2 – Security Question Field on the Change Password Page

To change the security question, perform the following steps:

1. Click MY ACCOUNT.

   The *Change Password* page is displayed.
2. Change your security question and answer by typing your new information in the **Security Question** and **Security Answer** fields.
3. Click Save to change your security question, or click Cancel to cancel the action.

Adding Payment Accounts

The system requires all users to have a payment account.

To add a payment account, perform the following steps:

1. Click MY ACCOUNT.

   The *Login – Change Password* 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 in the document.

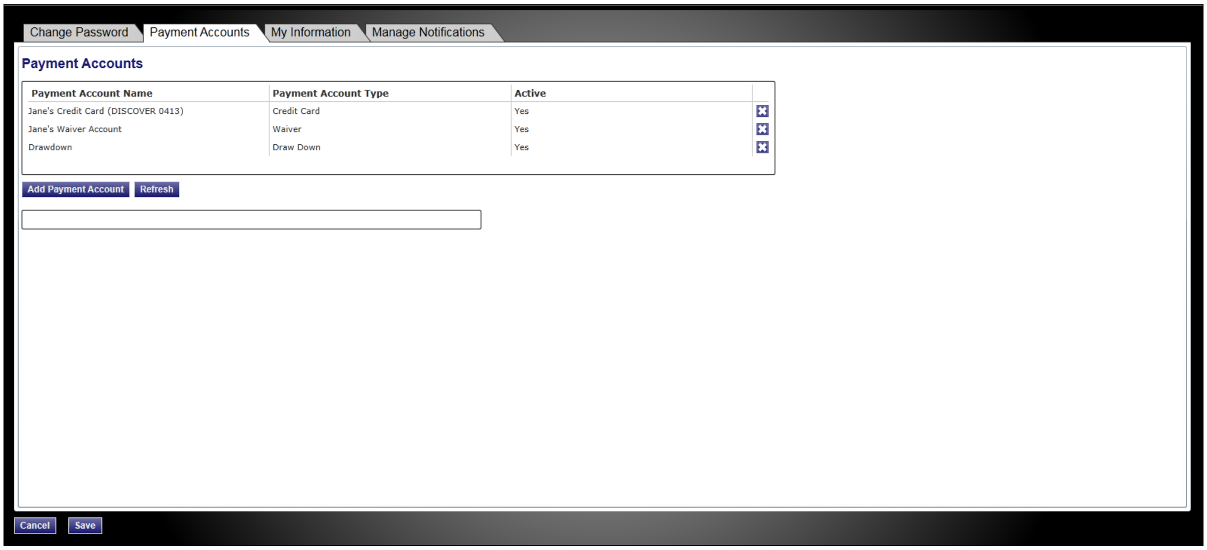


Figure 11.3 – Payment Accounts Page

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

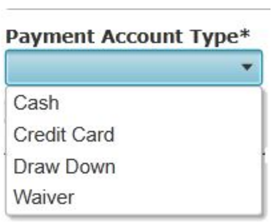


Figure 11.4 – Payment Account Type Drop-Down List

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

Figure 11.5 – 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.

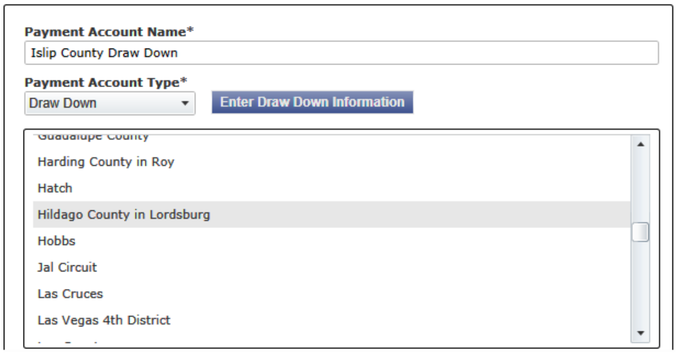


Figure 11.6 – Draw Down Selection Window

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.

Updating User Information

Users can update their personal information.

To update your personal information, perform the following steps:

1. Click MY ACCOUNT.

   The *Login – Change Password* page is displayed.
2. Click **My Information**.

   The *My Information* page is displayed.

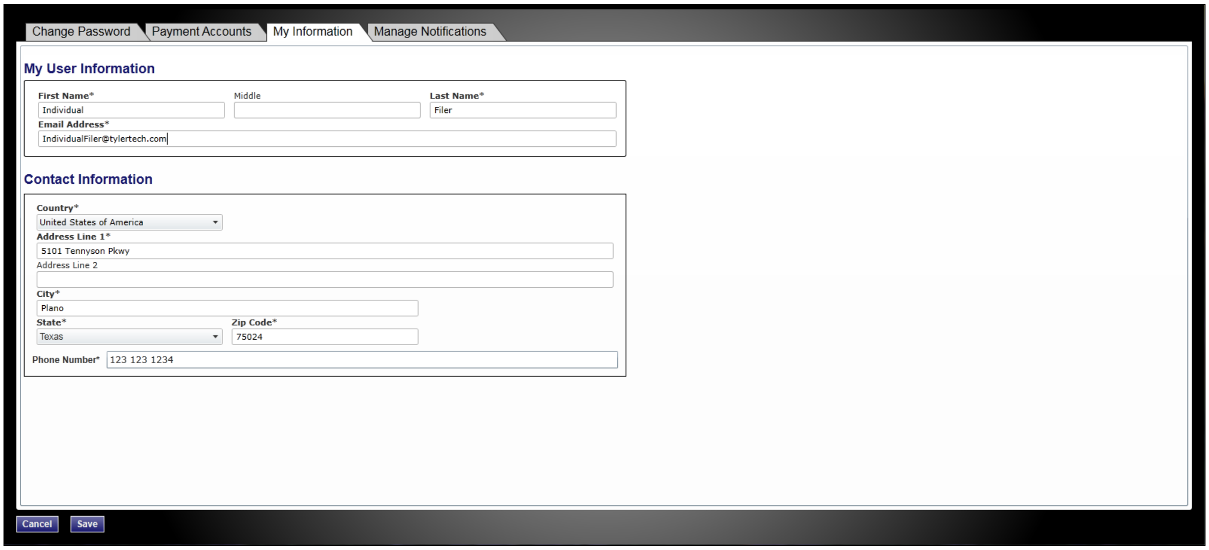


Figure 11.7 – My Information Page

3. Update any information as needed.
4. Click **Save** to save your changes, or click **Cancel** to cancel the action.

Managing Email Notifications

You can manage the email notifications that you want to receive from the system.

Figure 11.8 – Manage Notifications Page

To manage your email notifications, perform the following steps:

1. Click MY ACCOUNT.

   The *Change Password* page is displayed.

2. Click **Manage Notifications**.

   The *Manage Notifications* page is displayed.
3. Select the check boxes for the notifications that you want to receive, or clear the check boxes for the notifications that you do not want to receive.
4. Click Save to save your selection, or click Cancel to cancel the action.

12 Bookmarks

The *Bookmarks* page displays a list of case numbers and descriptions for the cases you have bookmarked. Only you can see this information.

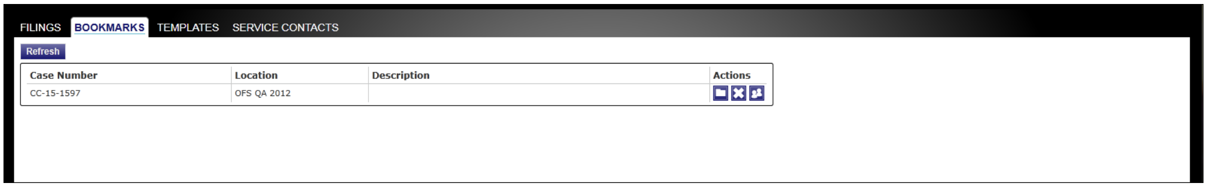


Figure 12.1 – Bookmarks Page

You can perform several functions on the *Bookmarks* page.

View Bookmarked Cases

You can view a list of your bookmarked cases, filter the bookmarked cases list, file into an existing case, remove the bookmarked case from the case list, and add service contacts to the case using the *Bookmarks* page.

Refresh the Bookmarked Cases List

You can manually refresh the *Bookmarks* page as changes are made to the system. Click **Refresh** to refresh the *Bookmarks* page.

Filter the Bookmarked Case List

You can filter the bookmarked case list by clicking on the arrows in the **Case Number**, **Location**, and **Description** columns.

File Into an Existing Case

Click  in the **Actions** column on the *Bookmarks* page when you are filing into an existing case.

Remove a Case from the Bookmarked List

You can remove a case from the bookmarked case list by clicking  in the **Actions** column on the *Bookmarks* page.

Add Service Contact to the Case

You can add service contacts to a selected case by clicking  in the **Actions** column on the *Bookmarks* page.

13 Filings

Topics Covered in this Chapter

After you have uploaded and submitted your filing, the filing is displayed in the Filings queue. From here, you can view the status of your filing, check the filing type, get a document description, see the number assigned to your case, review the details of the case, and cancel a filing.

View Filings

You can access the *Filings* page after initiating a case, by filing into a subsequent case, or by going directly to the *Filings* page.

Click WORKSPACE. The *Filings* page is displayed.

Use the *Filings* page to perform many of the tasks associated with e-filing. You can use the *Filings* page to manage your service contacts on a case, view the details of the case, add subsequent filings to a case, bookmark the case as a frequently accessed case, resume (continue) the filing process of a case saved as a draft, and cancel a filing.

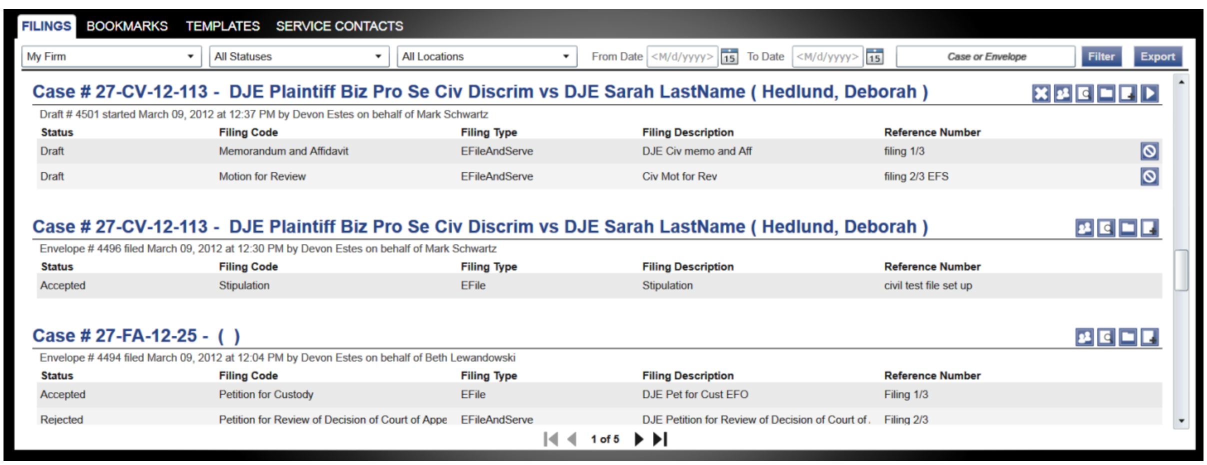


Figure 13.1 – Filings Page

Filtering the Filings Queue

The Filings queue displays the status of each filing. The status information is located in the status column on the *Filings* page. You will only see the status for the filings that you have submitted when logged in to the system, not all filings related to a case.

Note: Only you can see this information.

To filter the Filings queue, perform the following steps:

1. Click **Filings**.

All relevant information is displayed concerning your filings.

2. Select the filter parameters from the drop-down lists, or type specific information in the search fields.

Note: For the From Date or the To Date, click 15 to select dates from a calendar, or type the dates manually (for example, type `1/25/2017`).

Figure 13.2 – Select the Dates from the Calendar

3. Click **Filter** to filter the search.

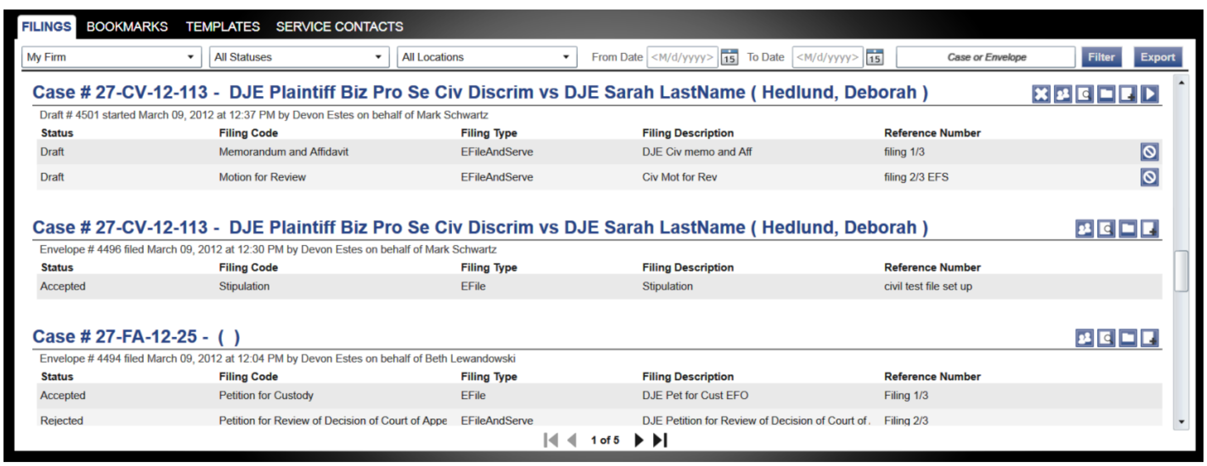


Figure 13.3 – Filings Page

Note: To clear the filter, click Filings on the toolbar.

A list of cases meeting your search criteria is displayed.

Exporting E-Filing Transactions

You can export a copy of the filings in the Filings queue to your computer using the **Export** option.

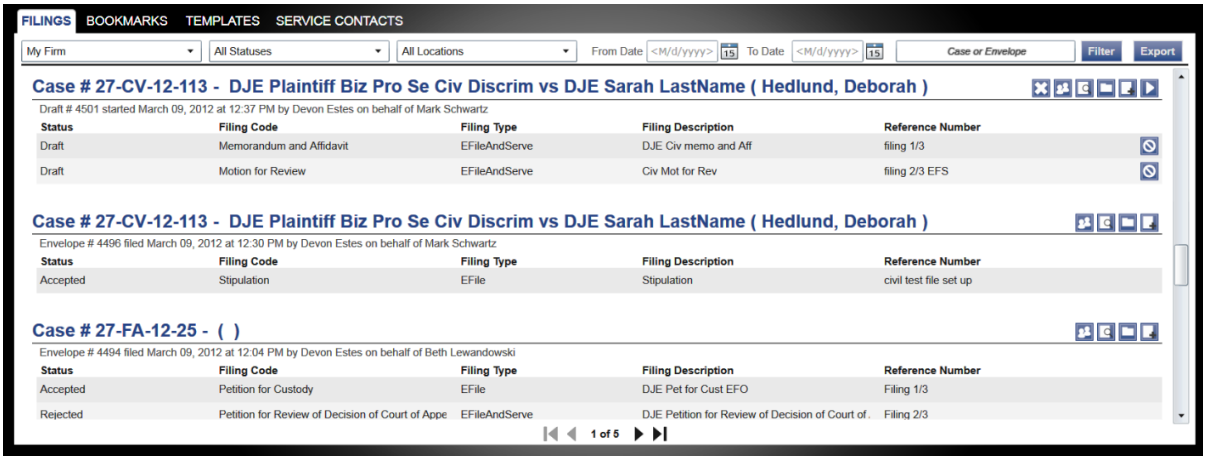


Figure 13.4 – Filings Page

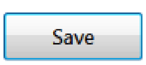
To export a copy of your filings to your computer, perform the following steps:

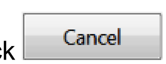
1. Click **Filings**.
2. Click 

.

   The Internet Explorer® window is displayed. From here, you can export your filings to a Microsoft Office® XML file.
3. Type a file name in the **File name** field provided.

Figure 13.5 – File Name Field

4. Click 

to save the filings to your computer, or click 

to cancel the action.

The files are saved on your computer.

View the Export File

Once the file has been exported, navigate to the location where the file was saved and open the file. Depending on the operating system (Microsoft Windows® or macOS® operating system software) and programs installed on your computer, your options will vary. If Microsoft Excel® (or a similar application) is installed on your computer, using it is the simplest way to view the data.

When you open the XML file, there will be two worksheets – one named Envelopes and one named Filings. Most users find the Envelopes worksheet easier to use for reconciliation of credit card statements, as the Filings worksheet contains multiple rows of data for envelopes created with multiple filings. Currently, the export file contains the following fields in the Envelopes worksheet:

- **Order ID**
- **Case**
- **Case Description** (Case Style)
- **Filed Date**

- **Court Fee**
- **Service Fee**
- **Convenience Fee**
- **Total Fee**
- **Response**
- **Capture Date**
- **Accept Date**
- **Account**
- **Responsible Party**
- **Envelope #**
- **Reference Number**

Using Microsoft Excel (or a similar application) provides the ability to sort, filter, and total the data being exported. Once the data has been sorted and filtered as appropriate, the **Total Fee** column can be totaled using a formula. The **Reference Number** field is a way to link the client file in your office back to the filings created and is used for internal purposes only. When you are e-filing a document and using the Reference Number in this manner, the Reference Number will assist in the reconciliation of charges to client files.

Copying the Envelope

If your filing has been rejected, you can copy an envelope to create a new envelope to resubmit to the courts. Use the Copy icon ( ) on the *Filings* page.

Note: The copied envelope should only be used to resubmit the filing for the same case as the copied envelope.

Note: The Copy icon is gray and unavailable if the envelope was previously copied.

To copy the envelope, perform the following steps:

1. Click **Filings**.

   The *Filings* page is displayed.

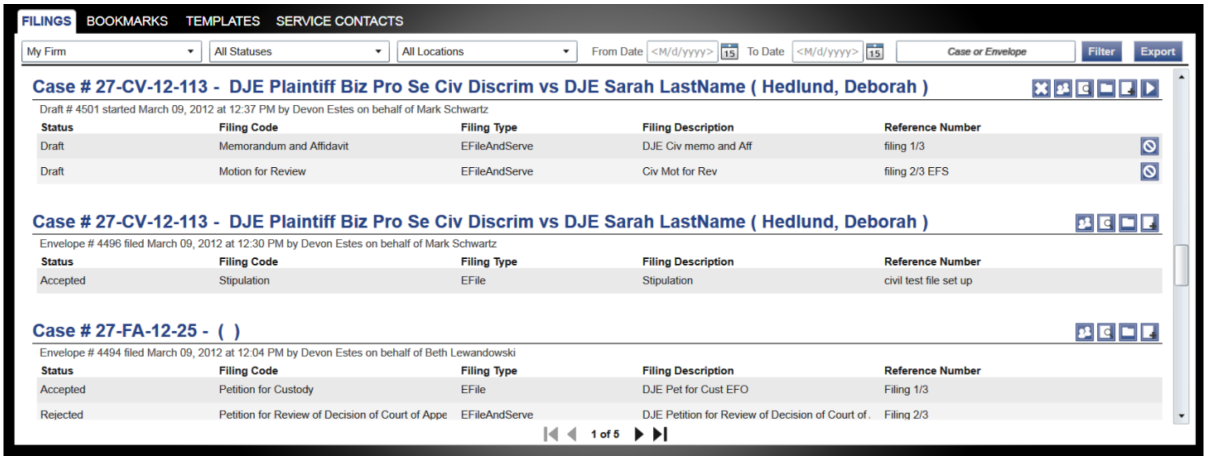


Figure 13.6 – Filings Page

2. Click a case on the *Filings* page to copy.

3. Click  for the selected case to copy the envelope.

Viewing the Envelope Details

You can use the *Filings* page to view the information entered for the envelope, the filing details, and the documents submitted.

To view the envelope details, perform the following steps:

1. Click WORKSPACE.

   The *Filings* page is displayed.

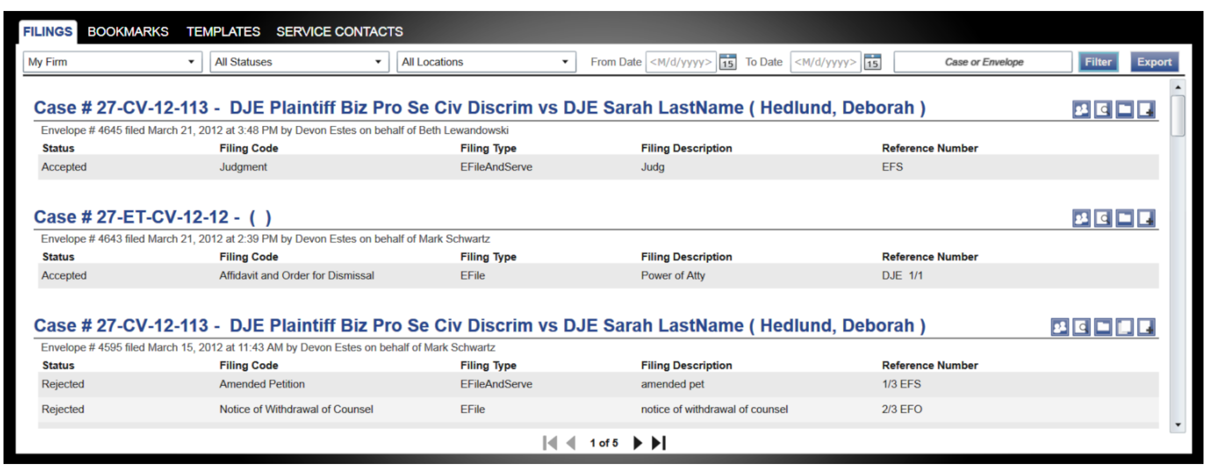


Figure 13.7 – Filings Page

2. Locate your case on the *Filings* page.

3. Click  for the details of the envelope that you want to view.

The *Envelope Details* window opens. Here, you can view the case information, the fees, the payment information, the service type, the case type, the case status, and the documents attached to the case.

Note: When a reviewer returns a filing, the status of Returned is displayed on the *Filings* page.

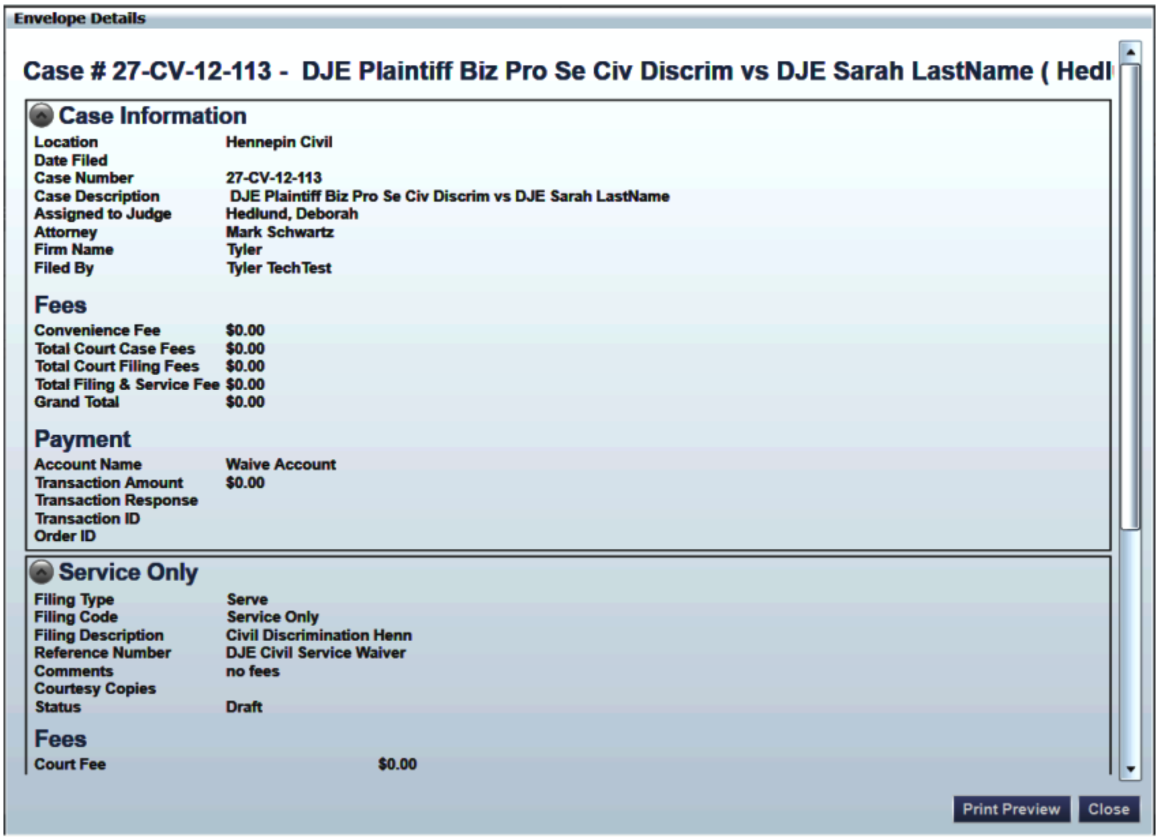


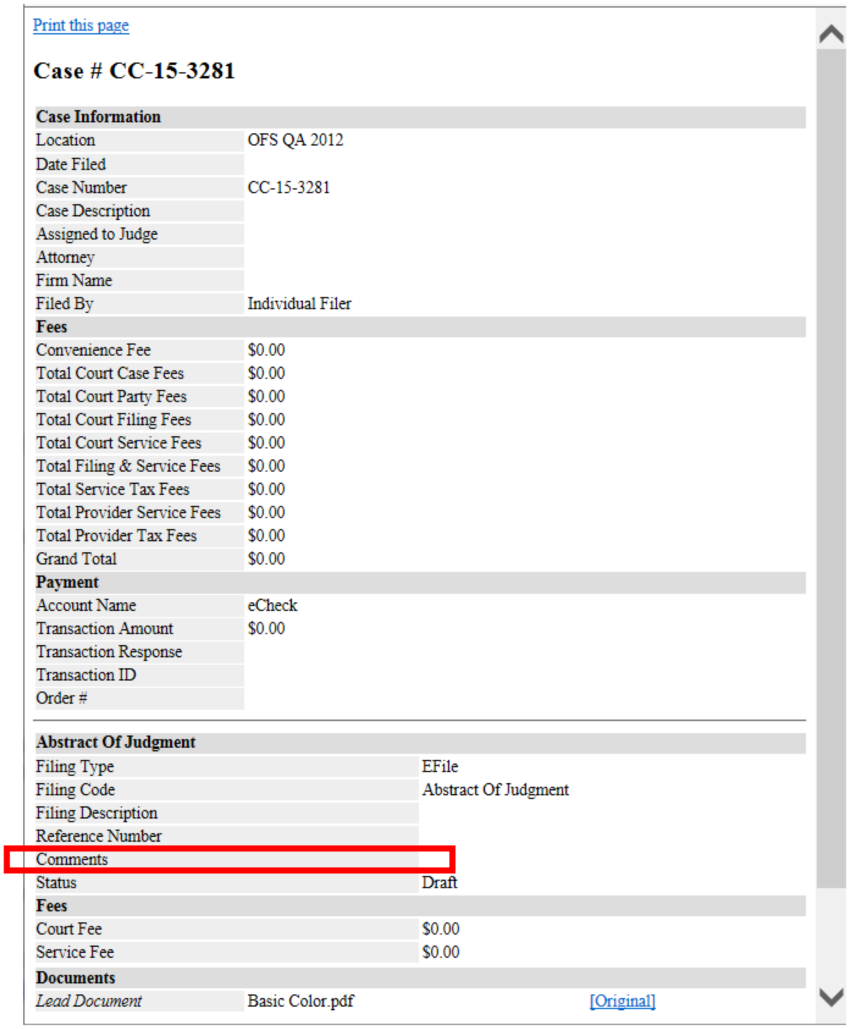
Figure 13.8 – Envelope Details Window

Note: If the Service check box was selected during the filing process, the type of service is displayed.

Note: A filer can review the error message in the Document Error Information section on the *Details* page when a Service Only filing submission fails.

4. Click **Print Preview** to open a printable version of the envelope details.

Note: The *Print Preview* page is displayed in a new tab or window, depending on your browser settings. If there are any comments regarding the case, they are shown in the Comments section.



Print this page

Case # CC-15-3281

Case Information		
Location	OFS QA 2012	
Date Filed		
Case Number	CC-15-3281	
Case Description		
Assigned to Judge		
Attorney		
Firm Name		
Filed By	Individual Filer	
Fees		
Convenience Fee	$0.00	
Total Court Case Fees	$0.00	
Total Court Party Fees	$0.00	
Total Court Filing Fees	$0.00	
Total Court Service Fees	$0.00	
Total Filing & Service Fees	$0.00	
Total Service Tax Fees	$0.00	
Total Provider Service Fees	$0.00	
Total Provider Tax Fees	$0.00	
Grand Total	$0.00	
Payment		
Account Name	eCheck	
Transaction Amount	$0.00	
Transaction Response		
Transaction ID		
Order #		
Abstract Of Judgment		
Filing Type	EFile	
Filing Code	Abstract Of Judgment	
Filing Description		
Reference Number		
Comments		
Status	Draft	
Fees		
Court Fee	$0.00	
Service Fee	$0.00	
Documents		
Lead Document	Basic Color.pdf	[Original]

Figure 13.9 – Print Preview Page

5. Click **Print this page** to print the summary.
6. When you are done viewing or printing the summary, close the tab or window.

   The *Filings* page is displayed.

Resuming the Filing Process

You can resume the filing after you have logged out of the system or exited the filing process. Click **Filings** to access the *Filings* page. From here, you can access your case and resume the filing.

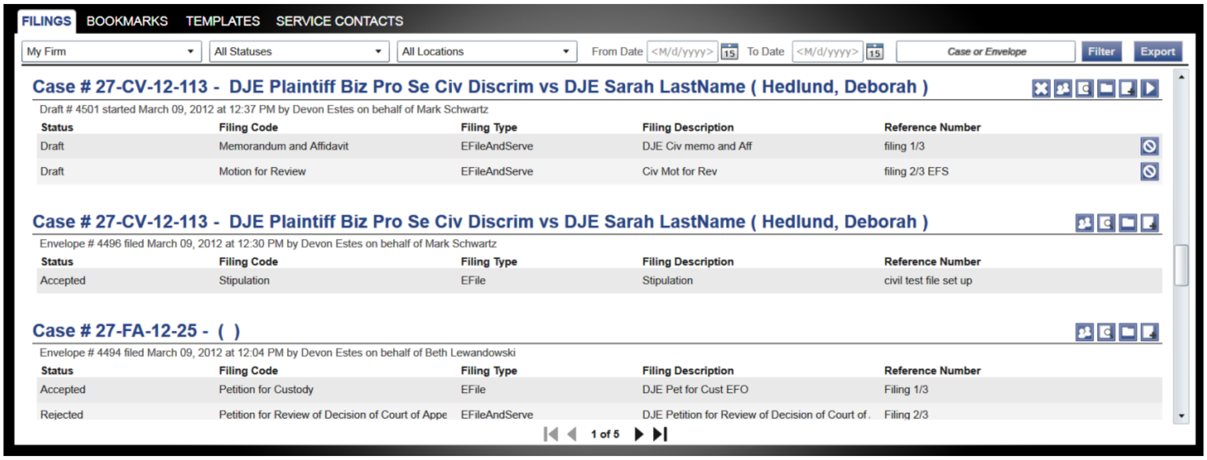


Figure 13.10 – Filings Page

To resume the filing process on the case, perform the following steps:

1. Click **Filings**.
2. Click a case or an envelope on the *Filings* page for which you want to resume a filing.

Note: The system prevents users from changing an envelope that has already been submitted. The *Cannot Resume Envelope* pop-up window is displayed when a user attempts to save the envelope, either by moving from one page to the next or by resuming the draft from the *My Filings* page.

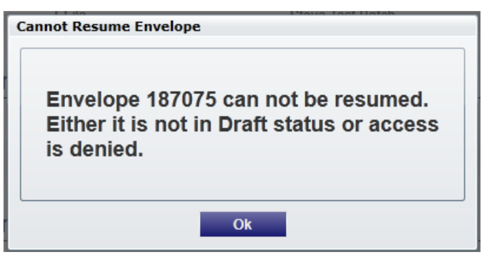


Figure 13.11 – Cannot Resume Envelope Message

3. Click  for the selected case to resume the filing process.

   The last-saved pages in your envelope or case open so that you can continue the filing process.

Canceling a Filing

You can cancel a filing that you have submitted before it is accepted by the courts. Once the filing status changes to “Under Review” or “Accepted,” you cannot cancel the filing.

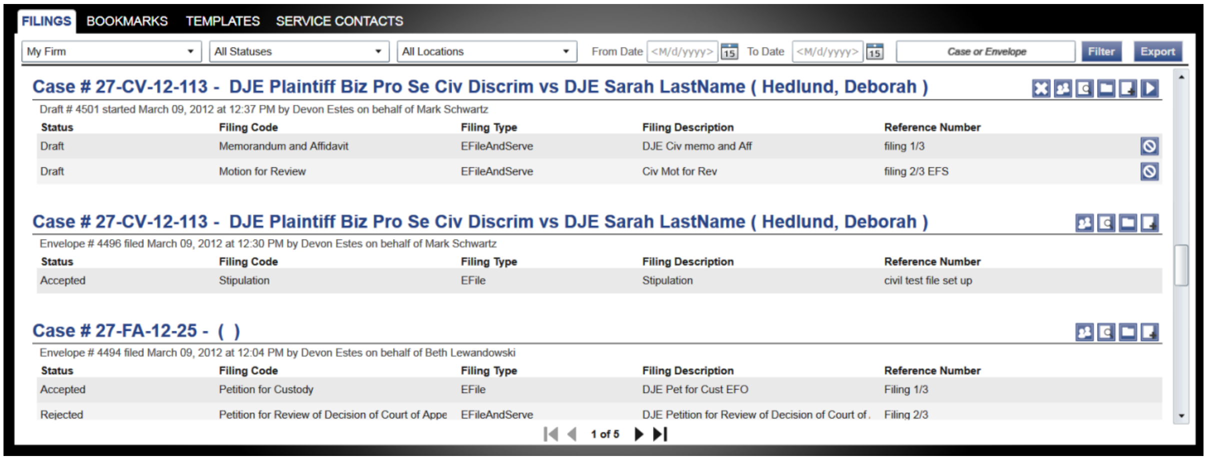


Figure 13.12 – Filings Page

To cancel a filing, perform the following steps:

1. Click **Filings**.
2. Click a case or an envelope on the *Filings* page that you want to cancel.
3. Click  for the selected case to cancel the filing.

14 Service Contacts

Topics Covered in this Chapter

Adding Service Contacts to a Case

You can add service contacts to a case.

To add a service contact to a case, perform the following steps:

1. Click WORKSPACE.

   The *Filings* page is displayed.

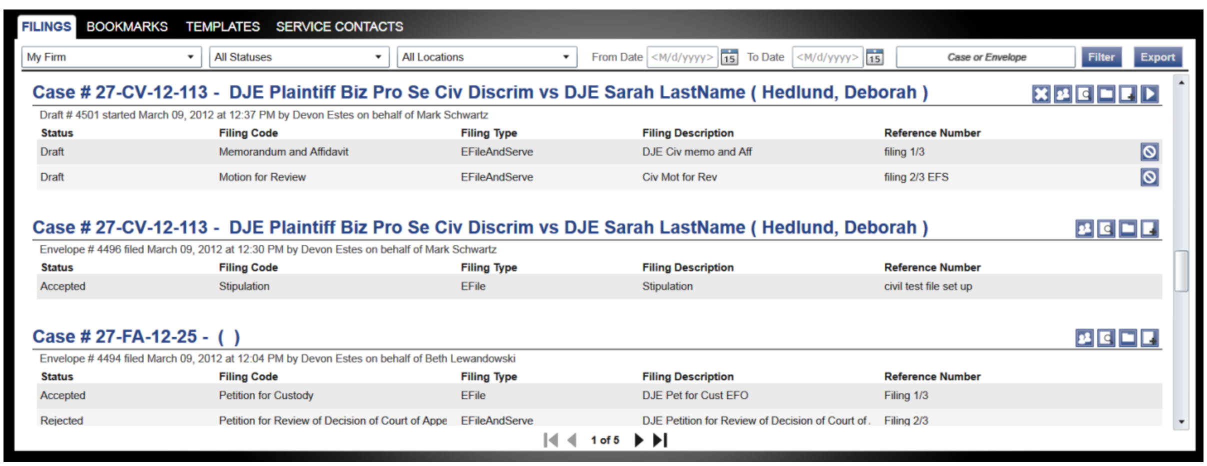


Figure 14.1 – Filings Page

2. Locate the case to which you want to add service contacts.

3. Click .

   The *Manage Case Service Contacts* page is displayed.

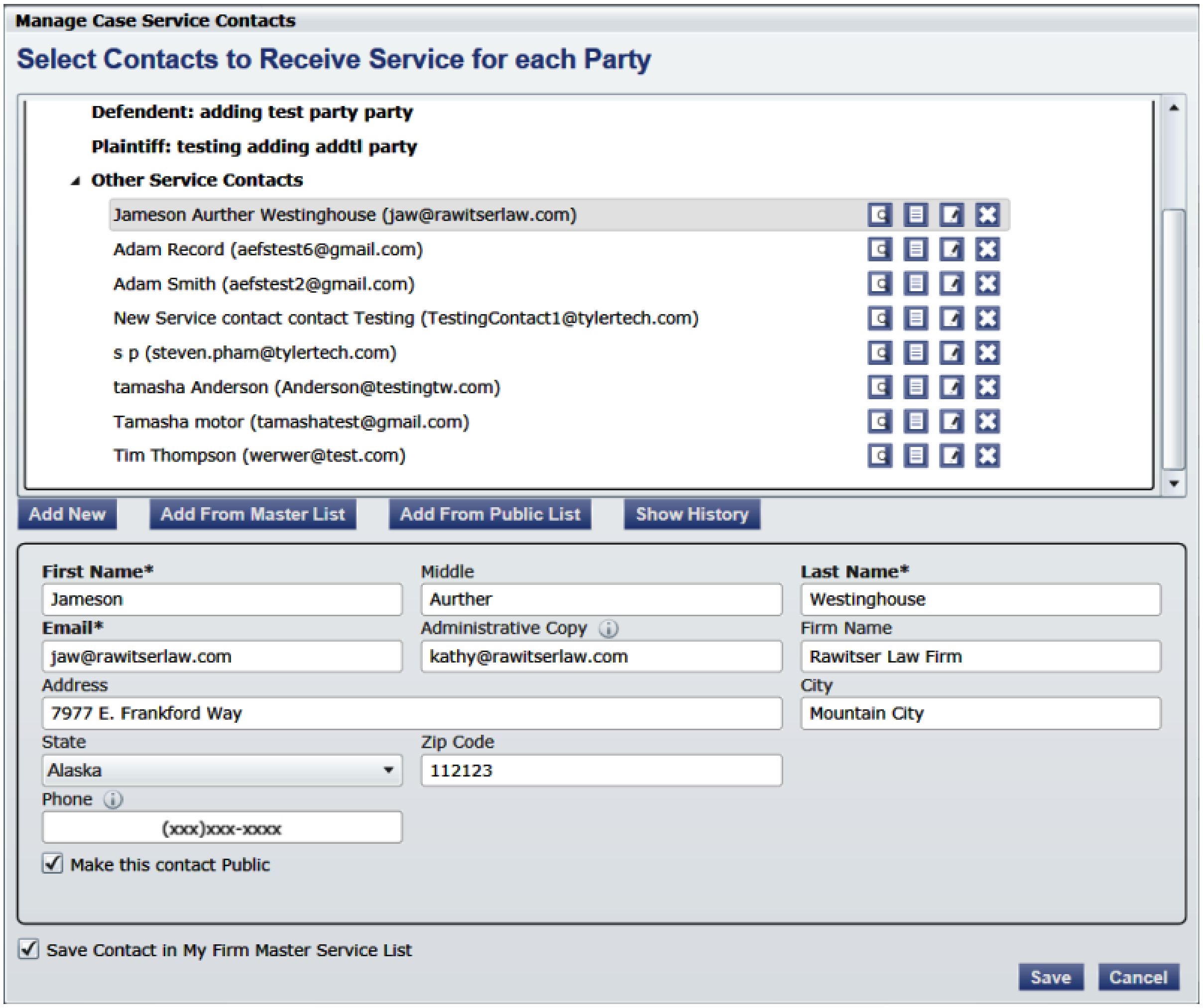


Figure 14.2 – Manage Case Service Contacts Page

4. Click the name of the service contact to add to the case, or click **Add New**.

   Note: If there is no email address displayed for the service contact, the contact cannot be served. You must add an email address, or add a new service contact to the case.

   The fields required to add a service contact are displayed.
5. Complete the add service contact fields by providing the applicable information.

   Note: An asterisk (*) indicates required information.
6. Type an email address in the **Administrative Copy** field.

   The administrative email is an optional email for the delivery of service. Delivery to the email address is not considered a determining factor for the completion of e-service.
7. Select the **Make this contact Public** check box to make the contact public.
8. Select the **Save Contact in My Firm Master Service List** check box to save the contact to the firm's master service list.
9. Click **Save** to save the contact.

Adding Service Contacts from a Master List

You can add service contacts to the **Case Service Contacts** list from the Master List.

To add service contacts to the **Case Service Contacts** list, perform the following steps:

1. Click WORKSPACE.

   The *Filings* page is displayed.

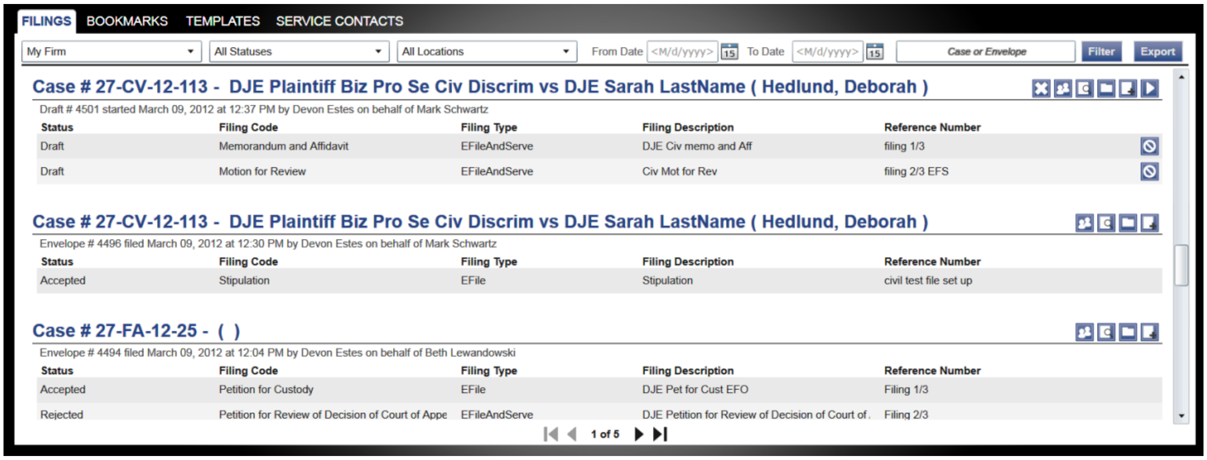


Figure 14.3 – Filings Page

2. Locate the case to which you want to add the service contact.

3. Click  to view the service contact information.

   The *Manage Case Service Contacts* page is displayed.

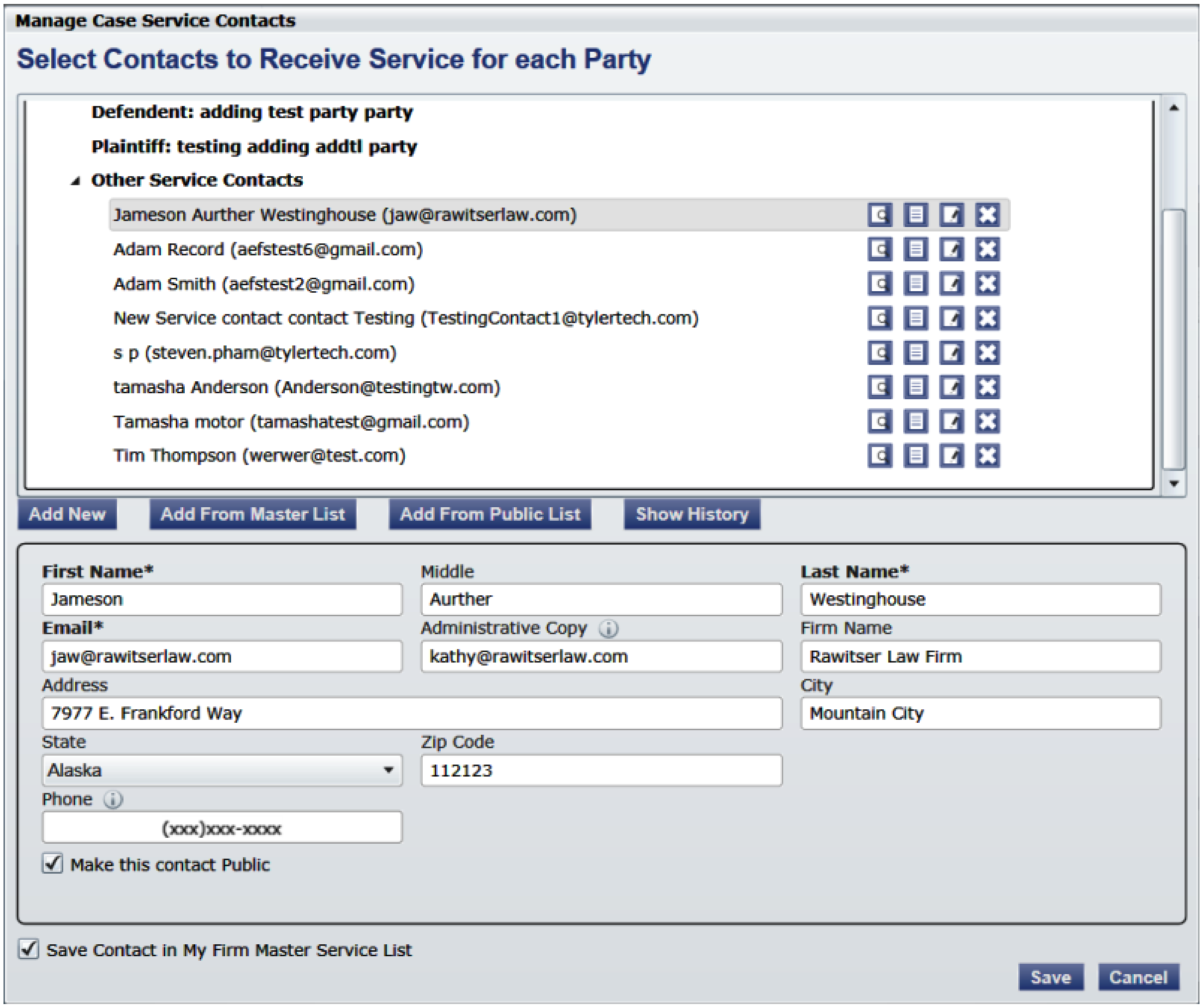


Figure 14.4 – Manage Case Service Contacts Page

4. Click **Add From Master List**.

   The *Add Service Contact from Master List* page is displayed.

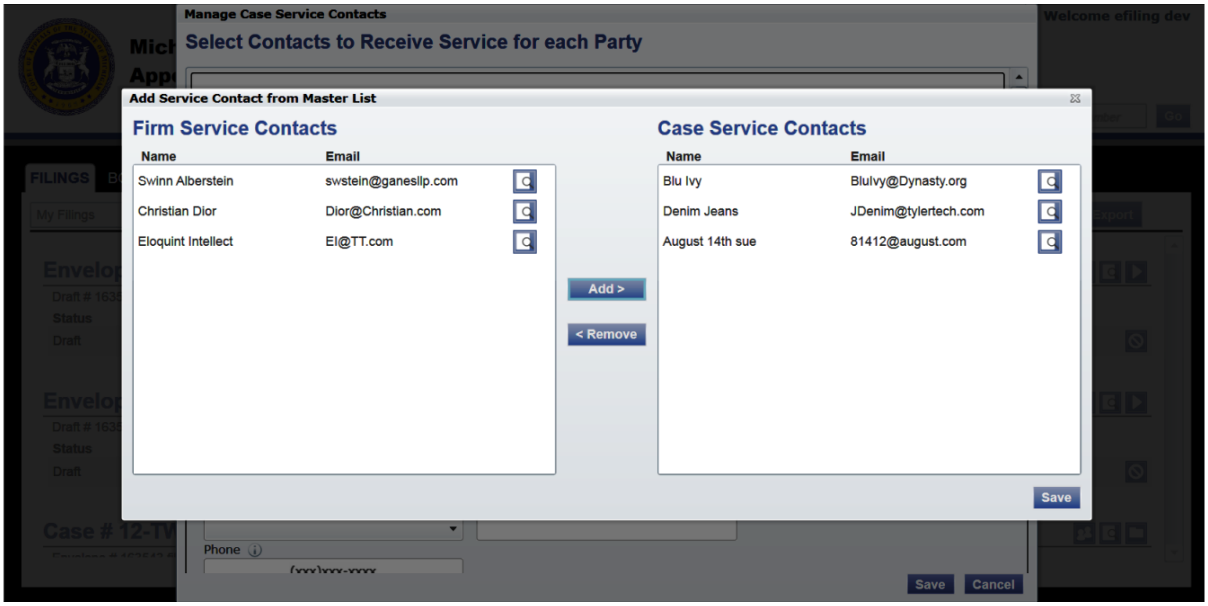


Figure 14.5 – Add Service Contact from Master List Page

5. Select the service contact from the **Firm Service Contacts** list.
6. Click **Add >** to add the service contact to the **Case Service Contacts** list.

   The new contact information is displayed in the **Case Service Contacts** list.
7. Click **Save** to save the **Case Service Contacts** list.

Adding Service Contacts from a Public List

You can add service contacts to the **Case Service Contacts** list from the public list of contacts.

To add service contacts to the **Case Service Contacts** list, perform the following steps:

1. Click WORKSPACE.

   The *Filings* page is displayed.

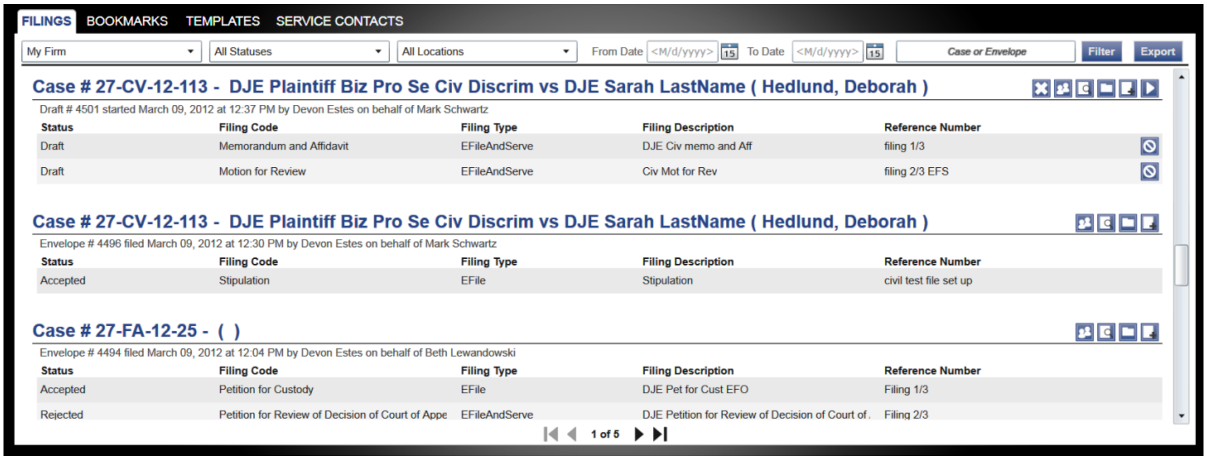


Figure 14.6 – Filings Page

2. Locate the case to which you want to add the service contact.
3. Click  to view the service contact information.

   The *Manage Case Service Contacts* page is displayed.

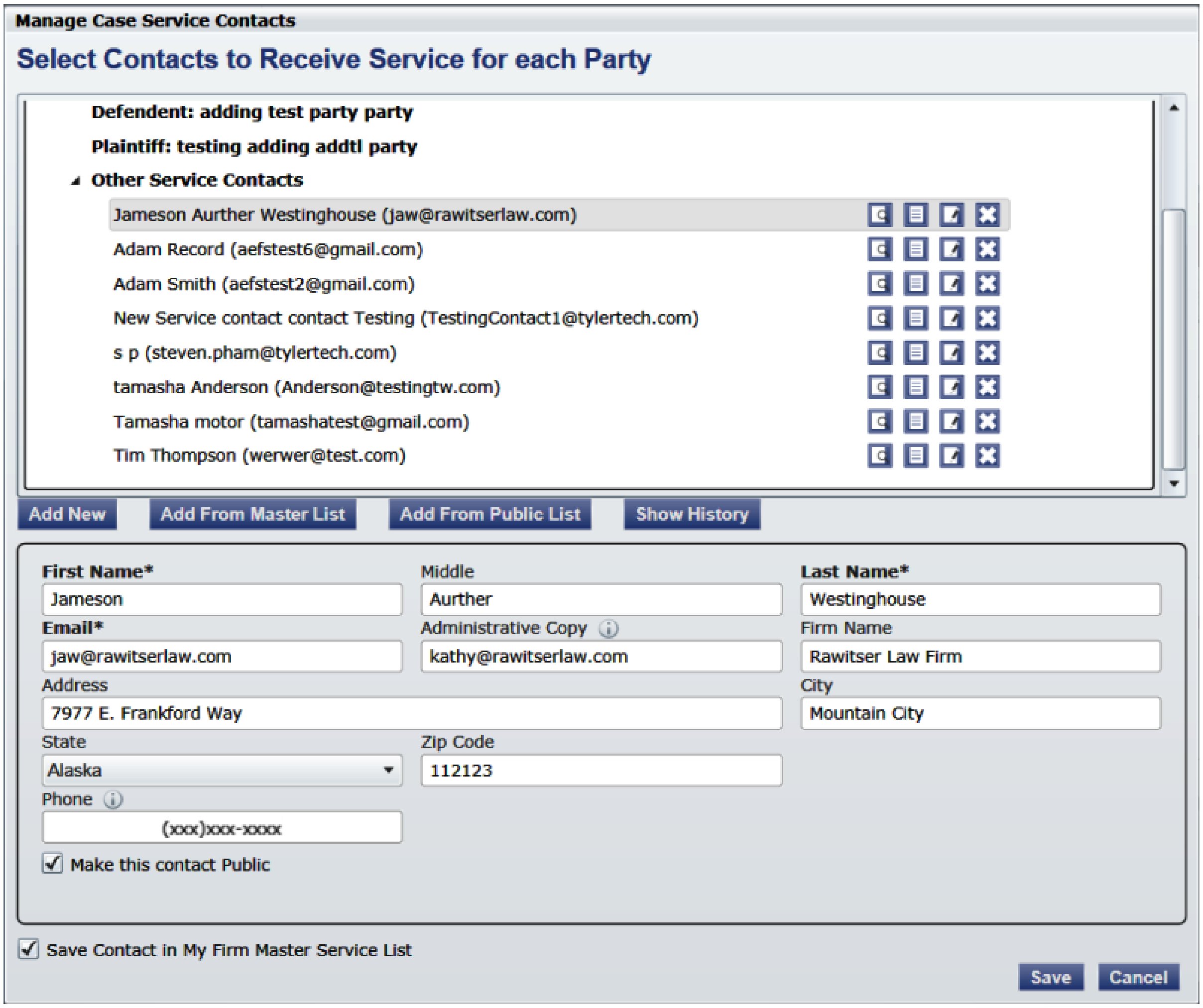


Figure 14.7 – Manage Case Service Contacts Page

4. Click **Add From Public List**.

   The *Add Service Contact from Public List* window is displayed.

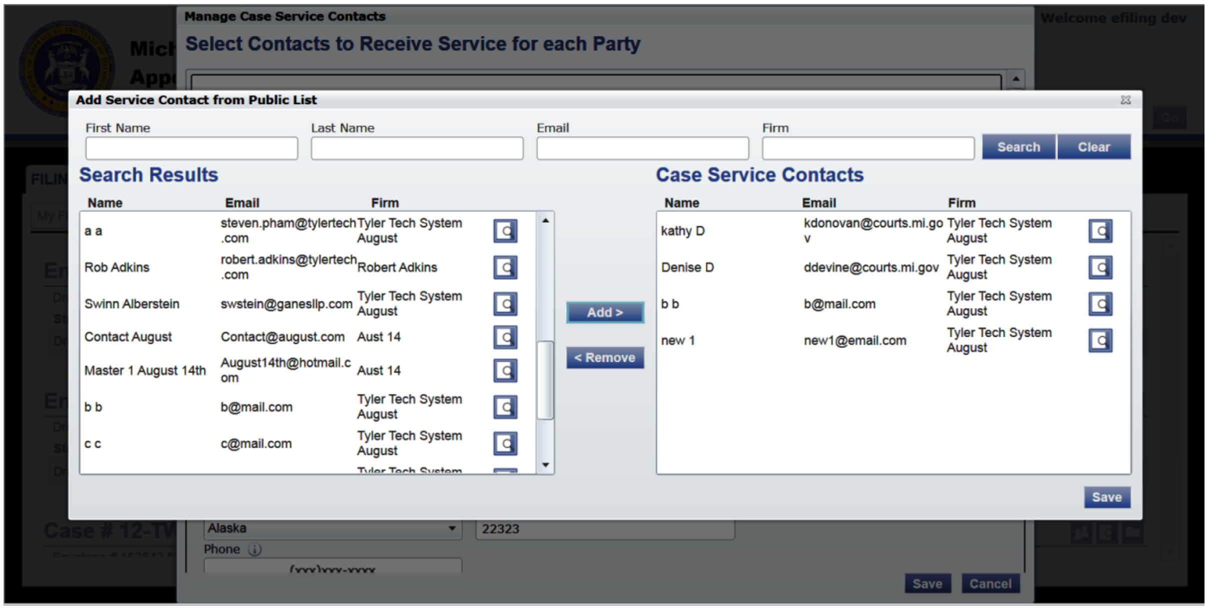


Figure 14.8 – Add Service Contact from Public List Window

5. Type the name or email address in the fields provided. Then, click **Search** to search for a specific service contact. Or click **Search** to display all available service contacts.
6. Select the service contact from the **Search Results** list.
7. Click **Add >** to add the service contact to the **Case Service Contacts** list.

   The new contact information is displayed in the **Case Service Contacts** list.
8. Click **Save** to save the **Case Service Contacts** list.

Viewing Service Contacts History

You can view the history of the service contacts attached to a case.

To view a service contact's history, perform the following steps:

1. Click WORKSPACE.

   The *Filings* page is displayed.

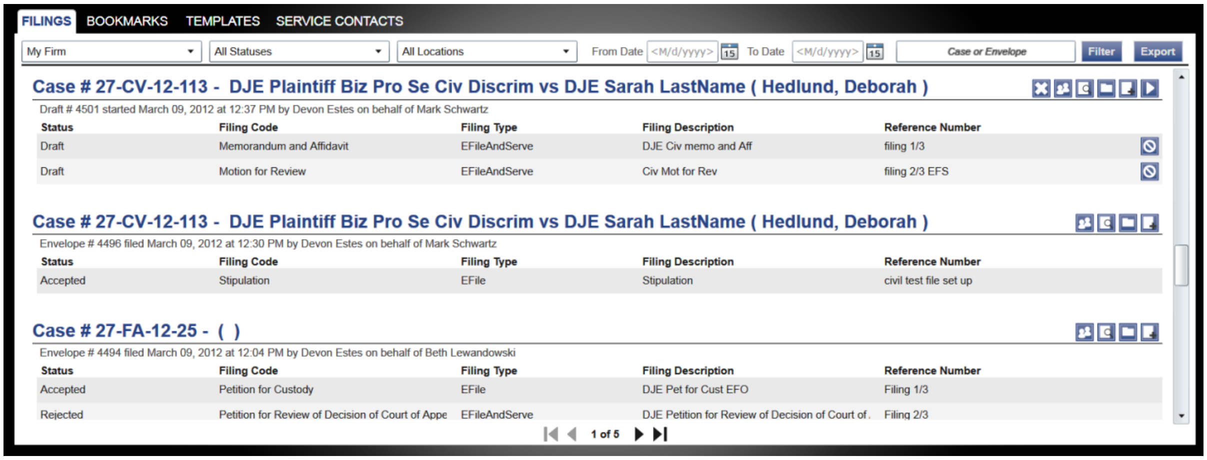


Figure 14.9 – Filings Page

2. Locate the case for which you want to view a service contact's history.
3. Click  to view the service contact information.

   The *Manage Case Service Contacts* page is displayed.

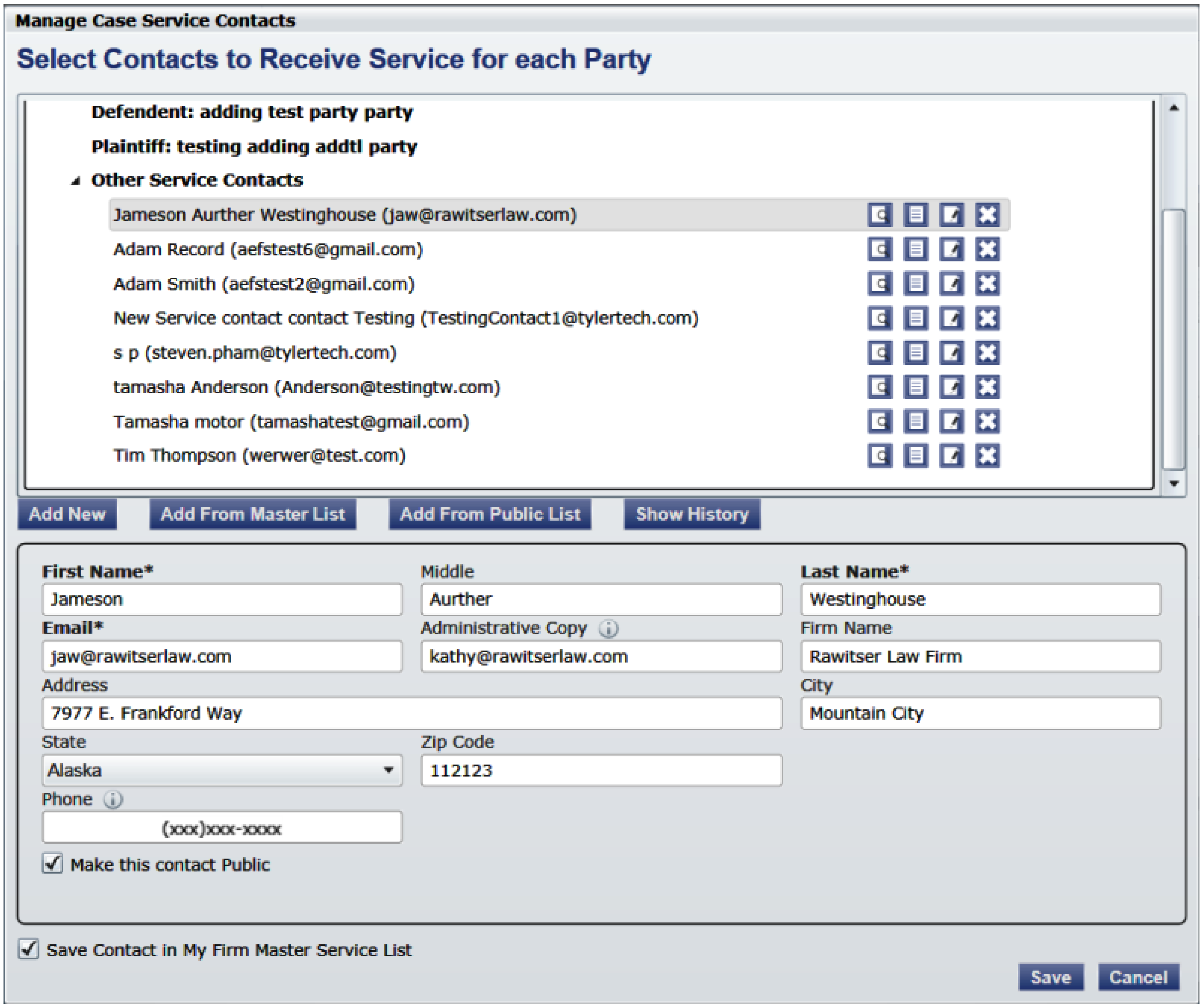


Figure 14.10 – Manage Case Service Contacts Page

4. Select a service contact from the list.
5. Click **Show History** to view the history of the selected contact.

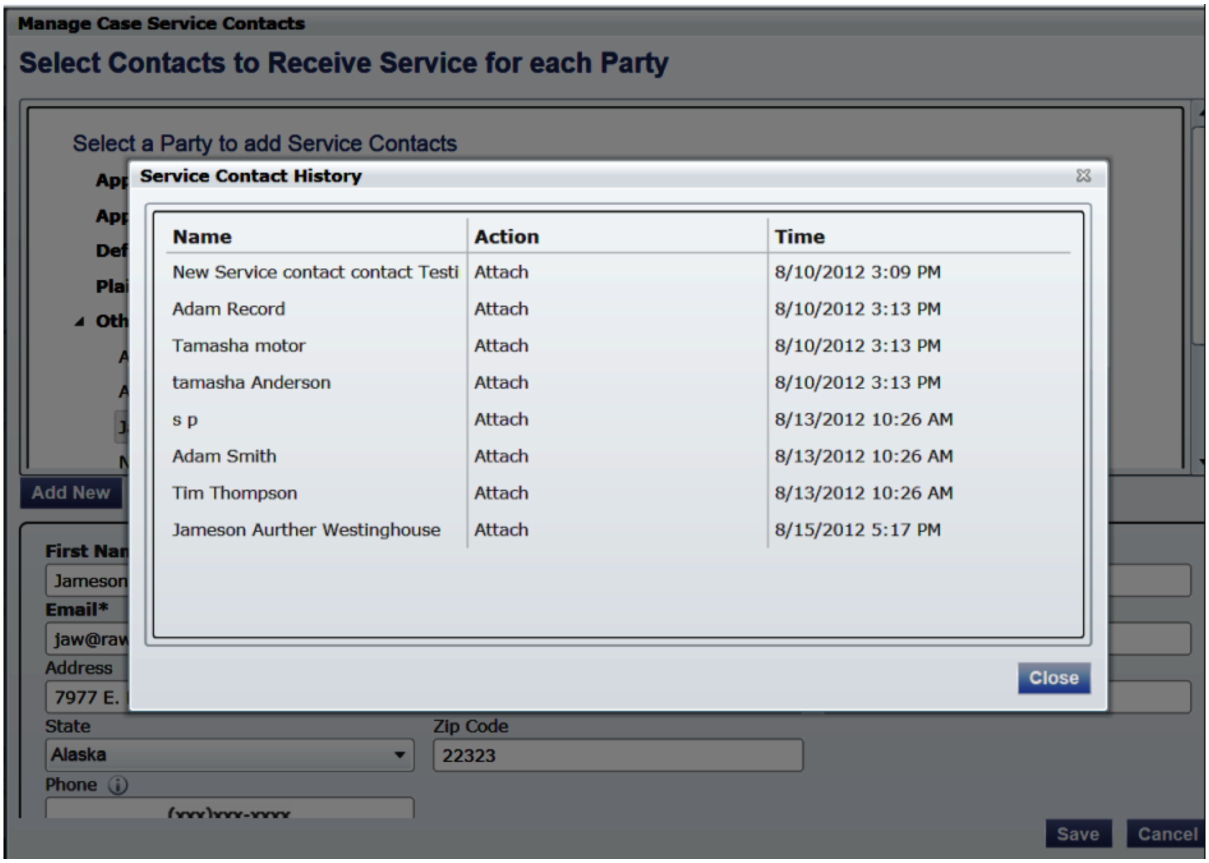


Figure 14.11 – Service Contact History Window

6. Click **Close** to close the *Service Contact History* page and return to the *Manage Case Service Contacts* page.

Viewing the Service Contact Details

You can view the service contact details of a contact in the **Service Contacts** list.

To view the service contact details of a contact, perform the following steps:

1. Click SERVICE CONTACTS.

   The *Service Contacts* page is displayed.

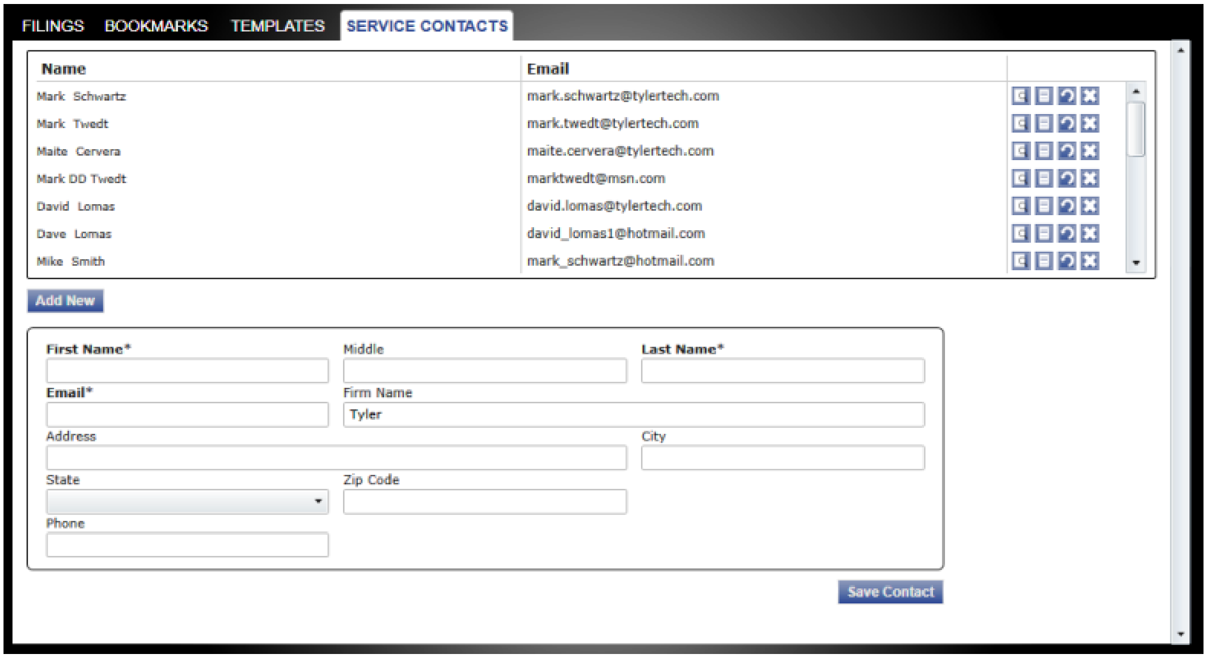


Figure 14.12 – Service Contacts Page

2. Locate the service contact for whom you want to view the details.
3. Click for the specified service contact.

   The *Service Contact Details* window opens, displaying the information about the service contact.

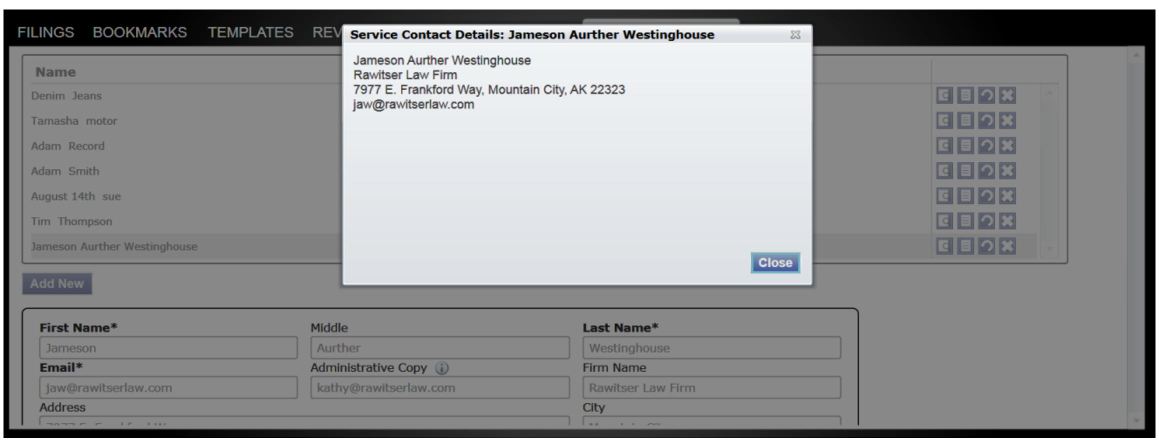


Figure 14.13 – Service Contact Details Window

4. Click Close to return to the **Service Contacts** list.

Viewing the Attached Case List

You can view the **Attached Case** list for a service contact.

To view the **Attached Case** list for a service contact on the *Service Contacts* page, perform the following steps:

1. Click SERVICE CONTACTS.

   The *Service Contacts* page is displayed.

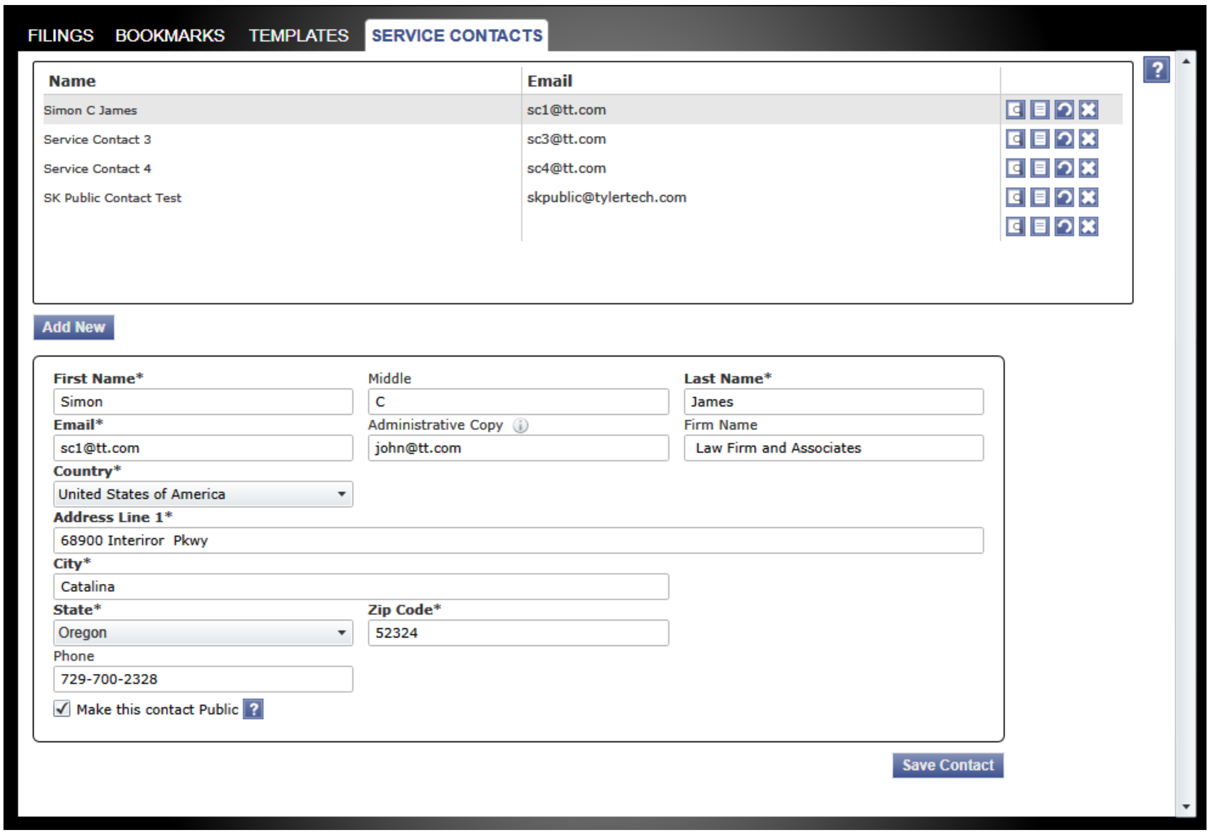


Figure 14.14 – Service Contacts Page

2. Click the icon for the specified service contact.

   The *Attached Cases* window for the specified contact is displayed.

3. Click Close to return to the *Service Contacts* page.

Replacing Service Contacts on the Case

You can replace service contacts on a case and in the **Service Contacts** list.

To replace a service contact in the **Service Contacts** list, perform the following steps:

1. Click SERVICE CONTACTS.

The *Service Contacts* page is displayed.

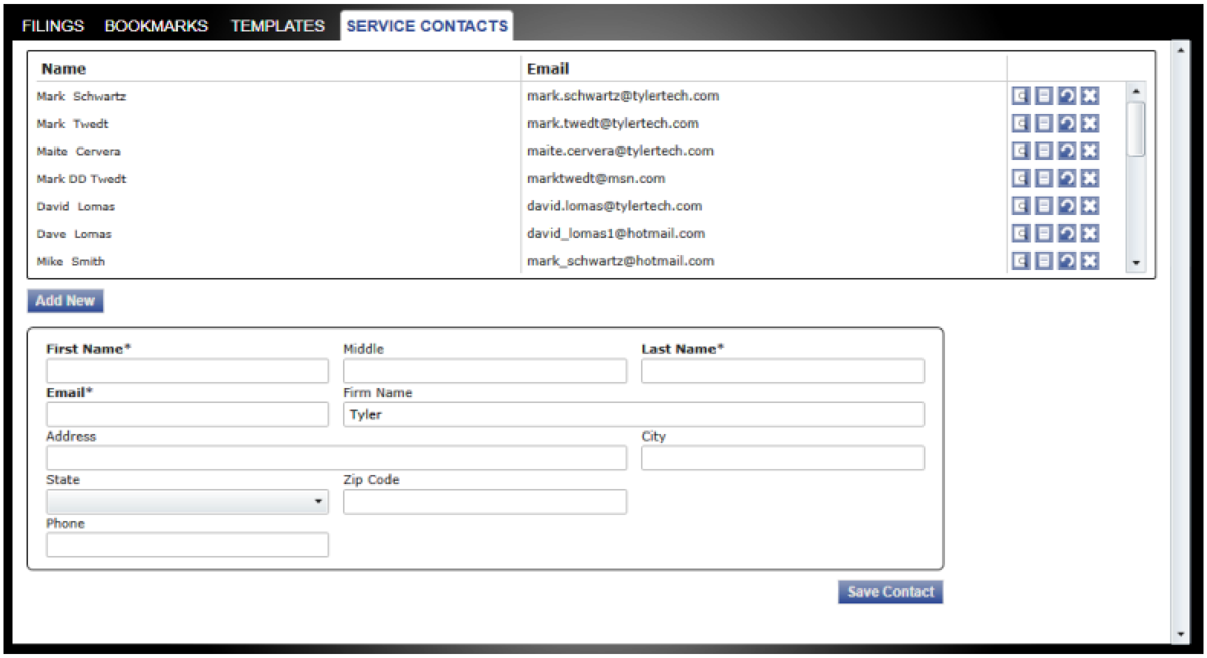


Figure 14.15 – Service Contacts Page

2. Click  for the specified service contact.

   The *Replace Service Contact* window is displayed.

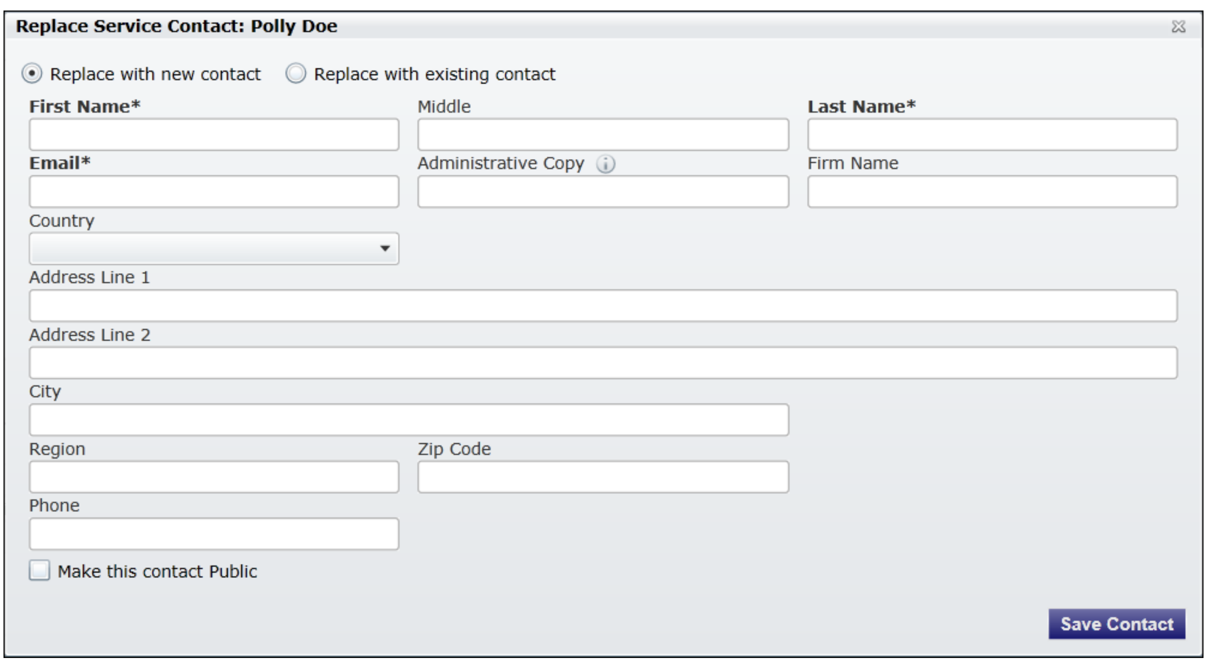


Figure 14.16 – Replace Service Contact Window

3. Do one of the following:

- If you are replacing the specified service contact with a new contact, select the **Replace with new contact** option. Complete the required fields for the new contact, and then click Save Contact.
- If you are replacing the specified service contact with an existing service contact, select the **Replace with existing contact** option. Select the replacement service contact from the **Select existing contact** drop-down list, and then click Save Contact.

Figure 14.17 – Replace Service Contact Window – Select existing contact Drop-Down List

The new contact information is displayed in the **Service Contacts** list.

Note: A notification is sent to the service contacts being removed from a case.

Removing Service Contacts from a Master List

You can remove service contacts from the **Case Service Contacts** list of the Master List.

To remove service contacts from the **Case Service Contacts** list, perform the following steps:

1. Click WORKSPACE.

   The *Filings* page is displayed.

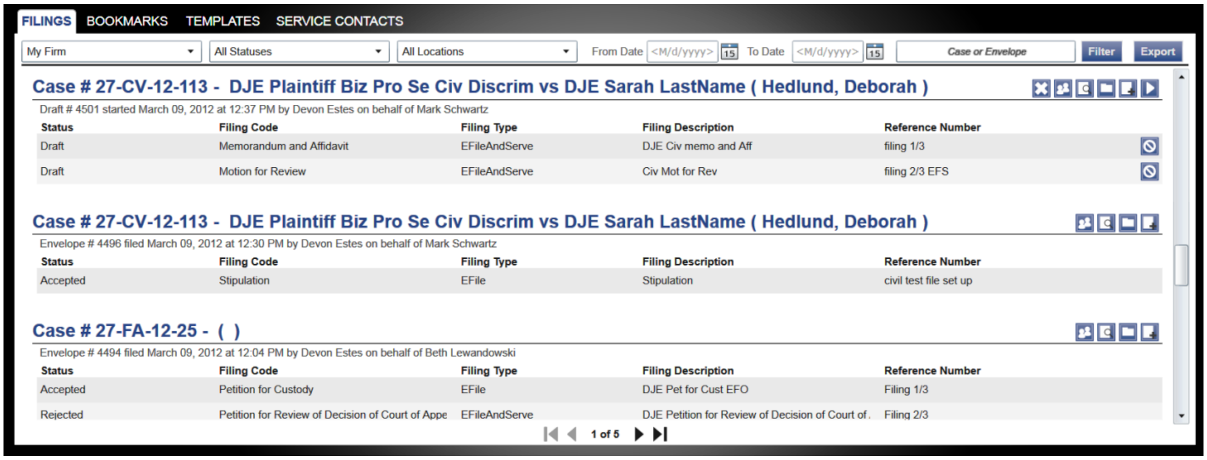


Figure 14.18 – Filings Page

2. Locate the case from which you want to remove the service contact.
3. Click  to view the service contact information.

   The *Manage Case Service Contacts* page is displayed.

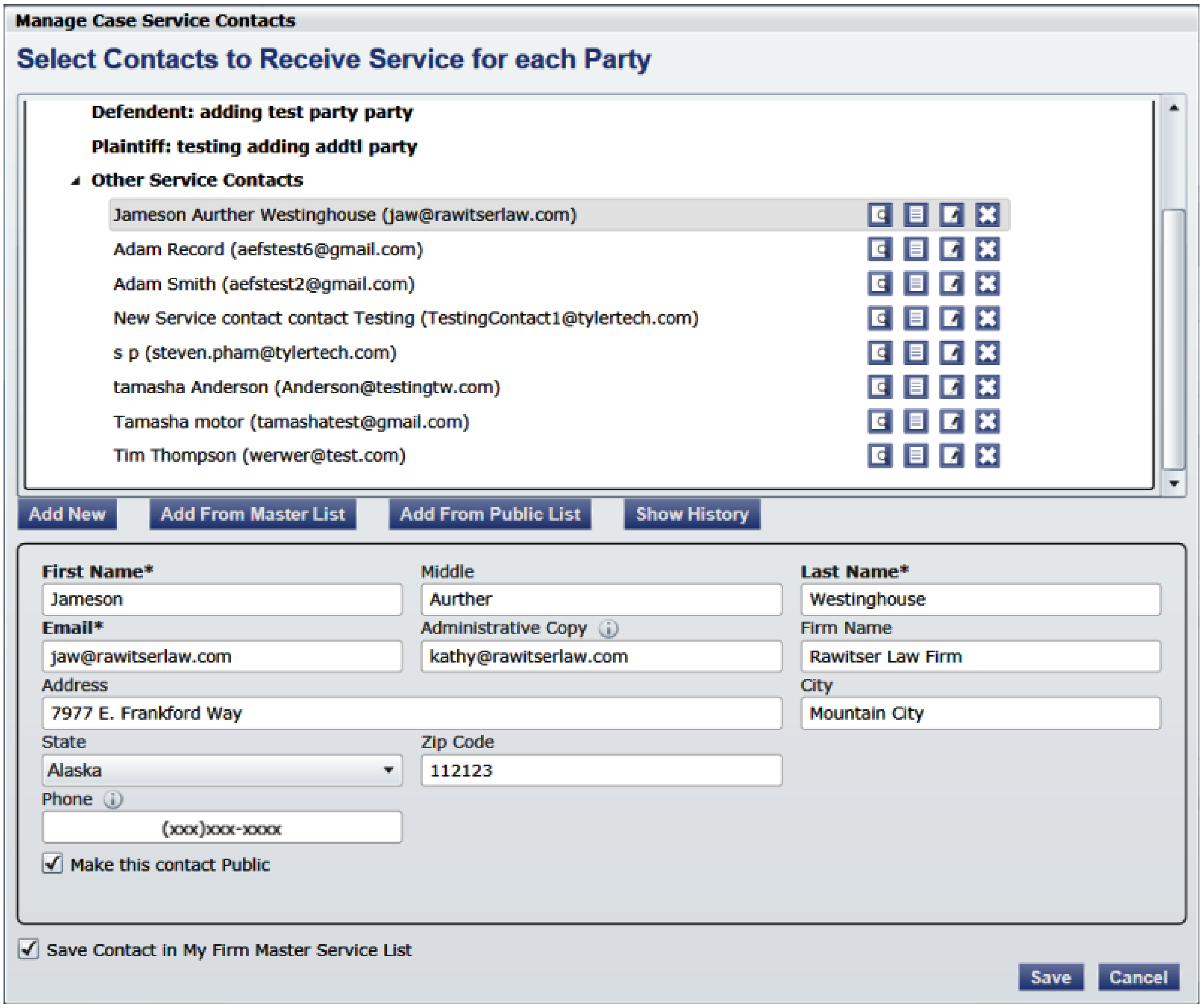


Figure 14.19 – Manage Case Service Contacts Page

4. Click **Add From Master List**.

   The *Add Service Contact from Master List* page is displayed.

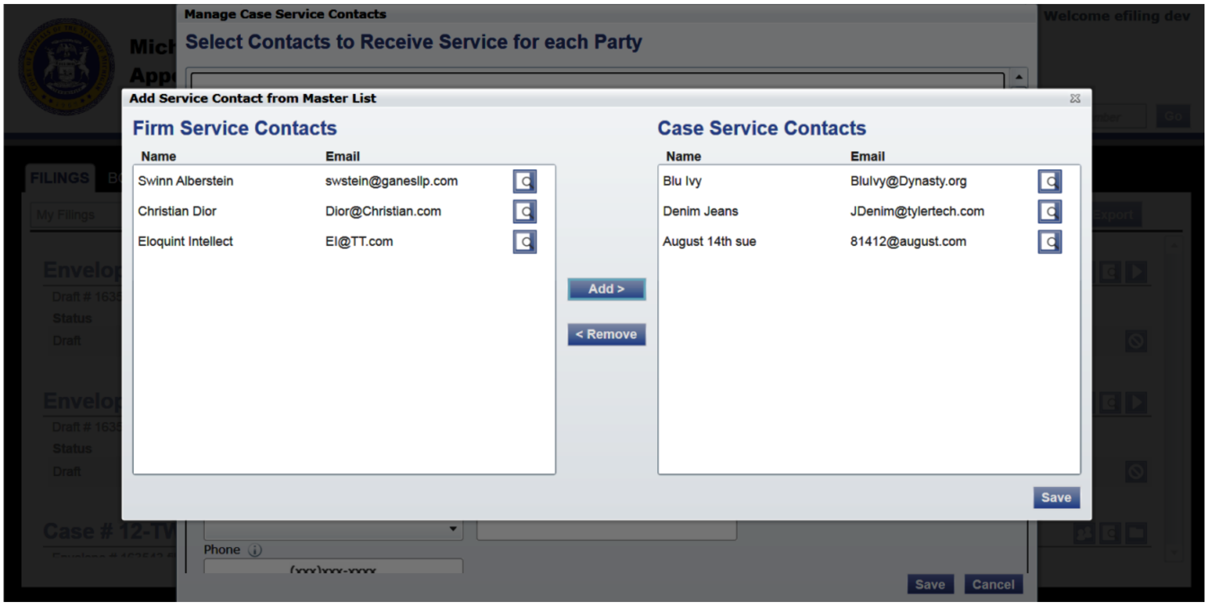


Figure 14.20 – Add Service Contact from Master List Page

5. From the **Firm Service Contacts** list, select the service contact that you want to remove.
6. Click **< Remove** to remove the specified contact from the **Case Service Contacts** list.
7. Click **Save** to save the **Case Service Contacts** list.

Removing Service Contacts from a Public List

You can remove service contacts from the **Case Service Contacts** list in the public list of contacts.

To remove service contacts from the **Case Service Contacts** list, perform the following steps:

1. Click WORKSPACE.

   The *Filings* page is displayed.

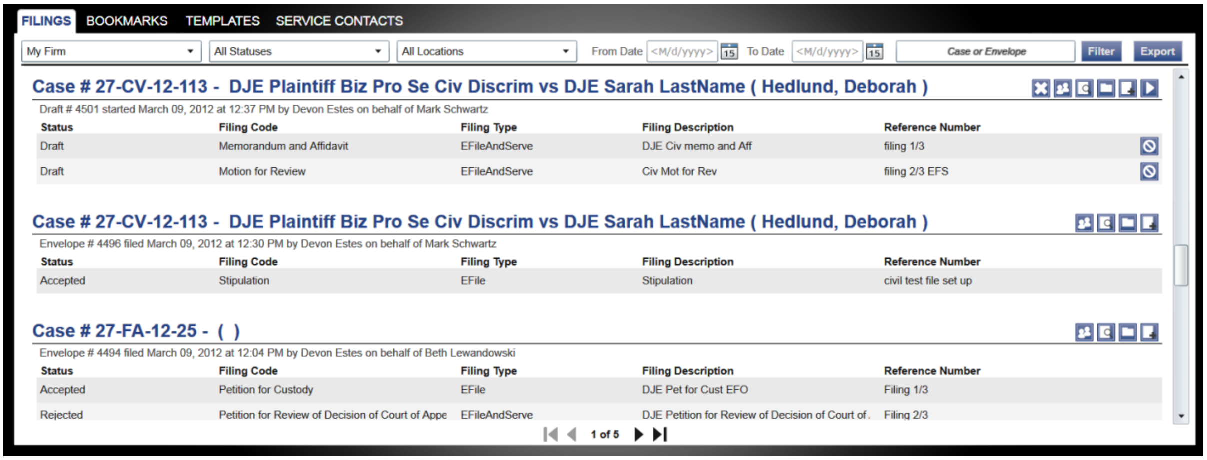


Figure 14.21 – Filings Page

2. Locate the case from which you want to remove the service contact.
3. Click  to view the service contact information.

   The *Manage Case Service Contacts* page is displayed.

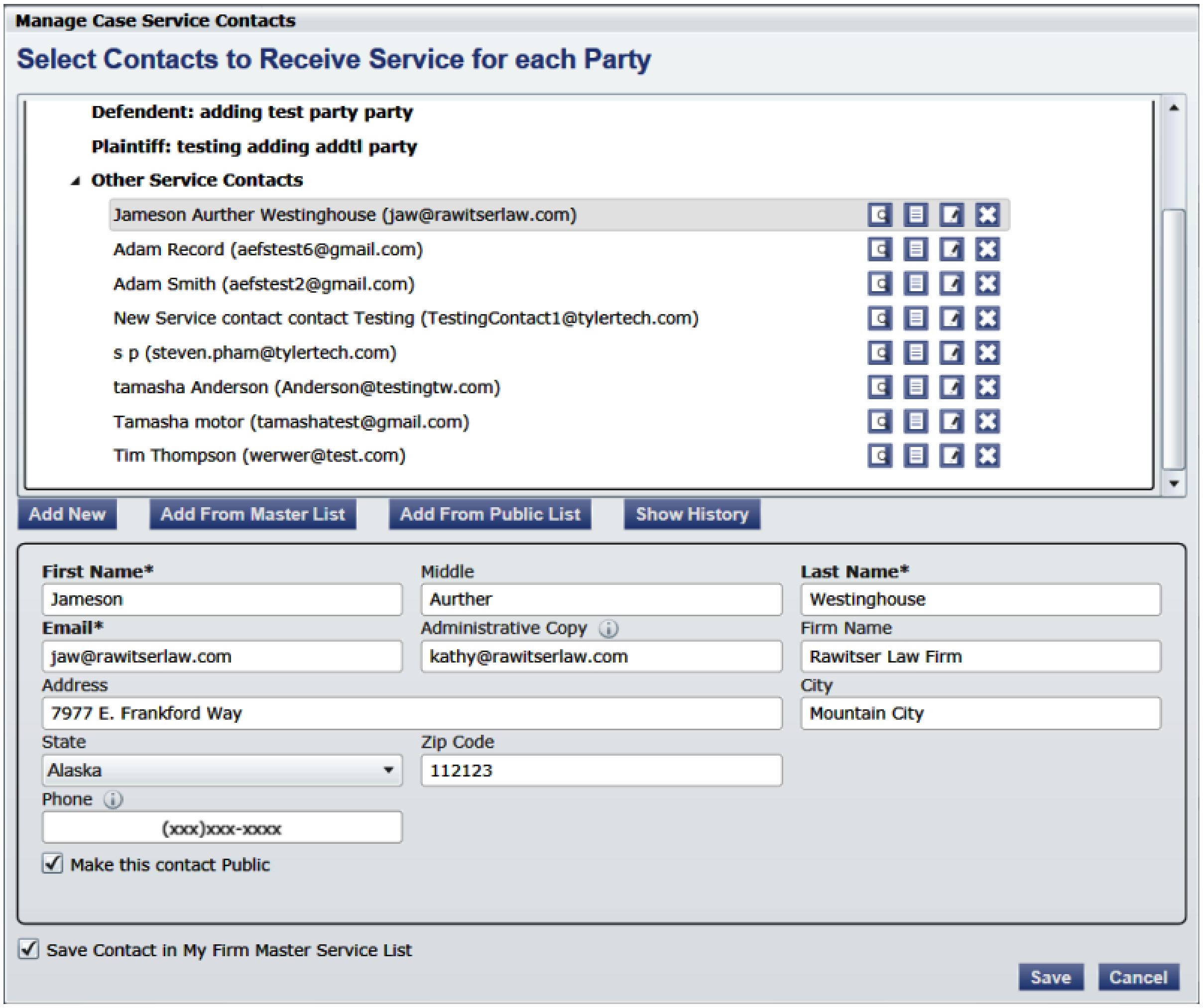


Figure 14.22 – Manage Case Service Contacts Page

4. Click **Add From Public List**.

   The *Add Service Contact from Public List* page is displayed.

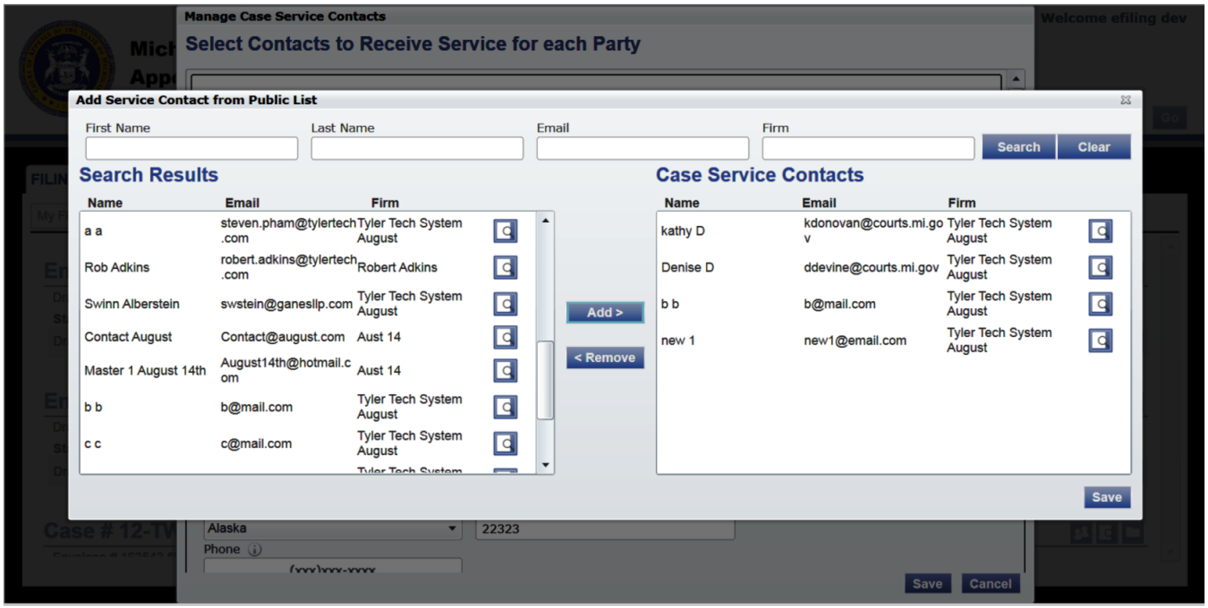


Figure 14.23 – Add Service Contact from Public List Page

5. Type the name or email address in the fields provided, and then click **Search** to search for a specific service contact. Or click **Search** to display all available service contacts.
6. Select the service contact from the **Search Results** list.
7. Select a contact from the **Case Service Contacts** list, and then click **< Remove** to remove the contact from the **Case Service Contacts** list.
8. Click **Save** to save the **Case Service Contacts** list.

Deactivating a Service Contact

You can deactivate a service contact on a case in the **Service Contacts** list.

To deactivate a service contact in the **Service Contacts** list, perform the following steps:

1. Click **SERVICE CONTACTS**.

   The *Service Contacts* page is displayed.

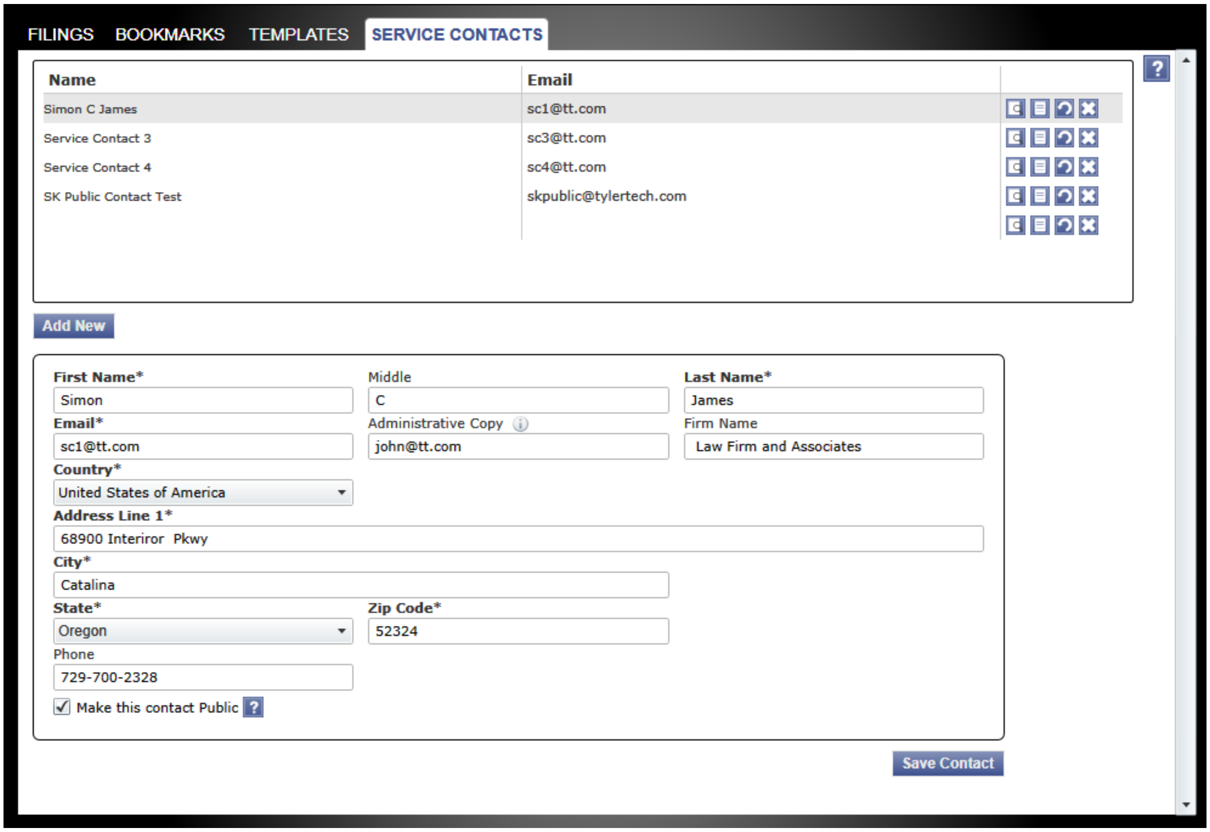


Figure 14.24 – Service Contacts Page

2. Click  for the specified service contact.

   The service contact is removed from the **Service Contacts** list.

   Note: A notification is sent to the service contacts that are being removed from the case. The administrator's email that is attached to the contact is also removed.

15 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.