



eFileTexas.gov™

Court Administrator User Guide – Release 2017.1

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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 Court Administrator features for this release.

Before You Begin

This guide is intended for Court 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.

FILINGS BOOKMARKS TEMPLATES SERVICE CONTACTS				
My Firm	All Statuses	All Locations	From Date <M/d/yyyy> 15	To Date <M/d/yyyy> 15
Case # 27-CV-12-113 - DJE Plaintiff Biz Pro Se Civ Discrim vs DJE Sarah LastName (Hedlund, Deborah)				
Envelope # 4643 filed March 21, 2012 at 3:48 PM by Devon Estes on behalf of Beth Lewandowski				
Status	Filing Code	Filing Type	Filing Description	Reference Number
Accepted	Judgment	EFileAndServe	Judg	EFS
Case # 27-ET-CV-12-12 - ()				
Envelope # 4643 filed March 21, 2012 at 2:39 PM by Devon Estes on behalf of Mark Schwartz				
Status	Filing Code	Filing Type	Filing Description	Reference Number
Accepted	Affidavit and Order for Dismissal	EFile	Power of Atty	DJE 1/1
Case # 27-CV-12-113 - DJE Plaintiff Biz Pro Se Civ Discrim vs DJE Sarah LastName (Hedlund, Deborah)				
Envelope # 4595 filed March 15, 2012 at 11:43 AM by Devon Estes on behalf of Mark Schwartz				
Status	Filing Code	Filing Type	Filing Description	Reference Number
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.

1 Case Information 2 Parties 3 Filings 4 Summary

Enter the Details for the New Case ?

Required fields are bold and have an asterisk (*).

Select Location*

Select Category* Required Field

Select Case Type*

Short Title ?

Filing Attorney*

Payment Account*

Exit Parties

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.

Zip*

654656 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.

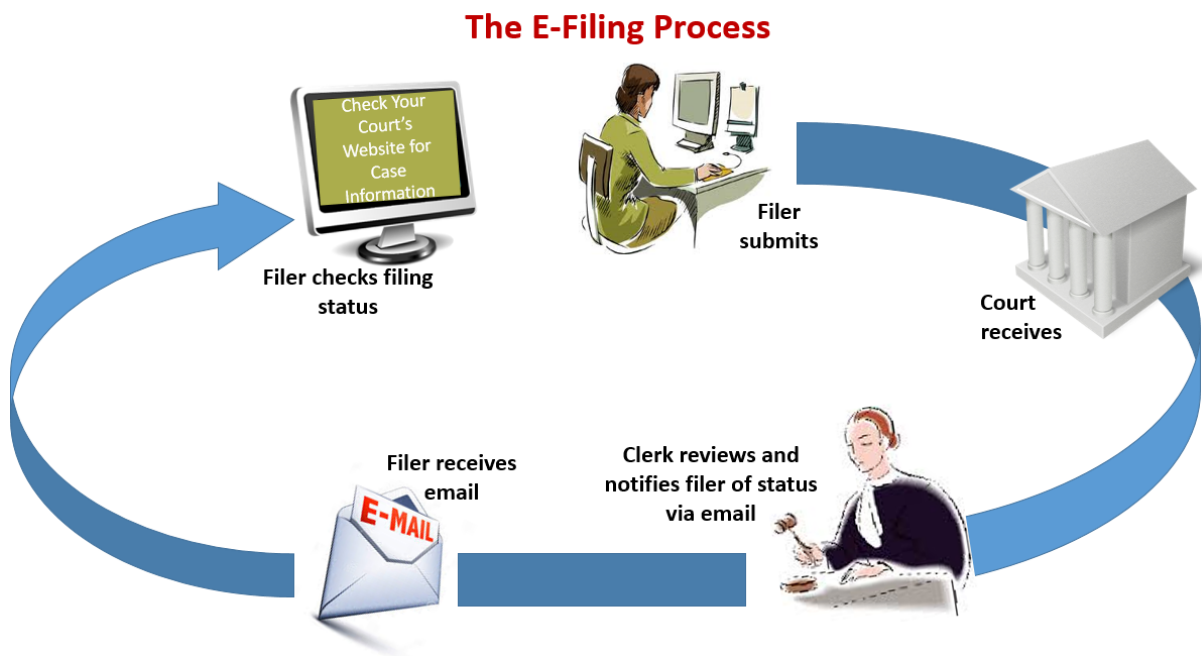


Figure 2.1 – The E-Filing Process

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	<p>A clerk reviewer has selected a filing from a queue.</p> <p>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.</p>
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	<p>The reviewer has reviewed and returned the filing as additional action must be taken by the filer.</p> <p>i Note: The filer can cancel or copy a filing in the Returned status.</p>

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.

MESSAGE OF THE DAY
Welcome to eFile.TXCourts.gov!
[Click here to learn more about the eFile.TXCourts.gov portal](#)
For the latest news and information about Texas e-filing, please visit www.eFileTexas.gov

***NEW* Filer Portal Available Now**
eFileTexas has now launched our "new" version of the filing portal. This new filing portal is designed in HTML5 and offers a number of added benefits including the ability to access eFileTexas on your tablet or phone, enabling copy, paste, sorting and filtering features, single screen data entry, keyboard shortcut navigation, modern web browser support and more!
To access and try out the new version of the filing portal, simply click [here](#).

***NEW* Standard Filing Codes**
In an effort to create uniformity and a consistent filing experience across the state, the Judicial Committee of Information Technology (JCIT) has developed a set of Technology Standards. This common set of case types, filing codes and options were recently approved by the Supreme Court and are being rolled out to all counties across the state. For a complete implementation time-line on when the Technology Standards will be available in your county, please click [here](#).

Important Information When Registering

- If you have **already** registered with another eFiling Provider, the **same login credentials** can be used on eFile.TXCourts.gov
- When registering as an attorney, **remove any leading zeros** from the **Attorney Number** validation field
- When registering as an attorney with a **sole practice**, "**Firm Administrator**" should be selected as the option on **Step 1: I Want to Register as a...**
- When registering as a **non-attorney filer**, "**An Independent User**" should be selected as the option on **Step 1: I Want to Register as a...**
- Be sure to **whitelist no-reply@eFileTexas.gov** to receive our e-mails (click [here](#) for more information)
- Not all courts accept American Express. To see a listing of which courts do, click [here](#) for information.

System Information

- The eFile.TXCourts.gov site is compatible with Silverlight version 5. You may download the most recent version [here](#).

LEARN

- [Get Started - PCs](#)
- [Get Started - Macs](#)
- [Filer Quick Reference Guide](#)
- [Filer User Guide](#)
- [Filer Firm Admin Guide](#)

TRAIN

Free Training Sessions

- [Web Training Sessions](#)

Self-study Online Training

- [Training Videos for eFile.TXCourts.gov](#)

Continuing Legal Education Credit

*Attention Attorneys – Register/Attend a CLE Accredited webinar announced by the Texas State Board of Continuing Education

SUPPORT

- [Need Help?](#)
- Share your screen with [GoToAssist](#)
- [Get To Assist](#)

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 Login and Logout

Topics Covered in this Chapter

- ♦ Logging In
- ♦ Logging Out
- ♦ Resetting Your Password

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.

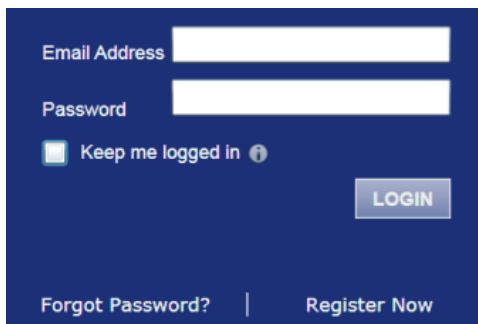


Figure 4.1 – Login Window

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.

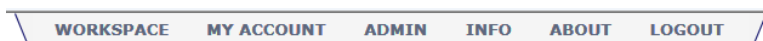


Figure 4.2 – Logout Link

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

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 if a security question is associated with the account.

A login window with 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. A light blue 'LOGIN' button is positioned to the right of the password field. At the bottom, there are two links: 'Forgot Password?' and 'Register Now', separated by a vertical line.

Figure 4.3 – 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 4.4 – 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 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.



The screenshot shows a search interface with the following elements: a 'NEW CASE' button in orange, a dropdown menu labeled 'All Locations' with a downward arrow, a blue button with a question mark, a search input field with a small 'i' icon above it, another blue button with a question mark, a 'Go' button, and a link labeled 'Advanced Search'.

Figure 5.1 – 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.

The screenshot shows a dialog box titled "Searching for: 11-000131-CK" with a sub-header "As: Case Number". It contains a table with three columns: "Case Number", "Description", and "Actions". The first row shows the case number "11-000131-CK" and the description "Brown, Jane v Black, Jane". Under the "Actions" column for this row, there are three icons: a folder, a document, and a person. A "Close" button is located at the bottom right of the dialog box.

Case Number	Description	Actions
11-000131-CK	Brown, Jane v Black, Jane	  

Figure 5.2 – 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.

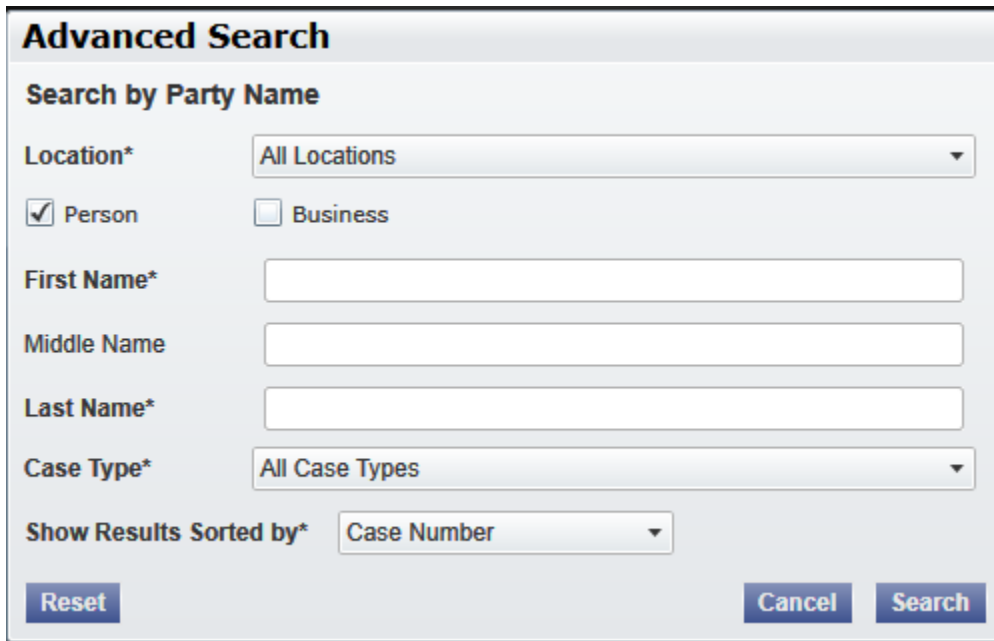
Note: An asterisk (*) indicates a required field.

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.



Advanced Search

Search by Party Name

Location* All Locations ▼

☒ Person ☐ Business

First Name*

Middle Name

Last Name*

Case Type* All Case Types ▼

Show Results Sorted by* Case Number ▼

Reset Cancel Search

Figure 5.3 – 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.

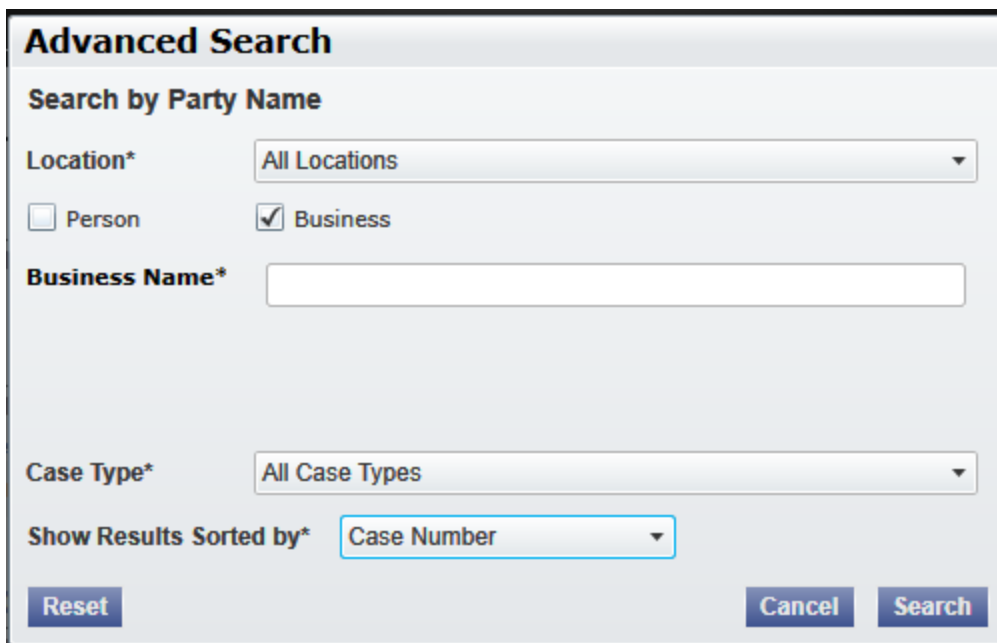
Note: An asterisk (*) indicates a required field.

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.



The image shows a web-based 'Advanced Search' dialog box. It has a title bar 'Advanced Search' and a subtitle 'Search by Party Name'. Below the subtitle, there is a 'Location*' dropdown menu currently set to 'All Locations'. Underneath, there are two checkboxes: 'Person' (unchecked) and 'Business' (checked). Below these is a 'Business Name*' text input field. Further down is a 'Case Type*' dropdown menu set to 'All Case Types'. At the bottom of the form area is a 'Show Results Sorted by*' dropdown menu set to 'Case Number'. At the very bottom of the dialog are three buttons: 'Reset', 'Cancel', and 'Search'.

Figure 5.4 – 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.

6 Court Administration

Topics Covered in this Chapter

♦ Manage New Users

The **Court Administration** section allows the Court Administrator to approve or reject new users, manage court users, and modify user accounts.

Manage New Users

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

Filtering New Users Options

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

i Note: Features vary based on your system configuration.

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

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

The *Approve New Users* page is displayed.

<input checked="" type="checkbox"/>	First Name	Last Name ^	Email Address	Role	Status

Figure 6.1 – Approve New Users Page

2. Type the user name or email address, or select a role from the drop-down list.
3. Click **Filter**.

The court users that meet your criteria are displayed.

Approving and Rejecting New Users

The Court Administrator approves or rejects new users for the court. When a user registers for the system, the Court Administrator receives notification that a user has registered and has requested to be added to the court.

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

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

The *Approve New Users* page is displayed.

<input checked="" type="checkbox"/>	First Name	Last Name ^	Email Address	Role	Status

Figure 6.2 – Approve New Users Page

2. Select the user from either the **Approve** list or the **Reject** list.
3. Click **Approve** to approve the new user, or click **Reject** to reject the new user.
4. Click **Save Changes** to save the changes and continue, or click **Cancel Changes** to cancel any changes made.

7 Manage Court User Accounts

Topics Covered in this Chapter

- ◆ Filtering Court Users Options
- ◆ Adding Court User Accounts
- ◆ Editing Court User Accounts
- ◆ Deleting Court User Accounts

The Court Administrator is responsible for registering and approving new users, adding user accounts, resetting passwords, and activating and deactivating user accounts for the courts.

Filtering Court Users Options

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

Note: Features vary based on your system configuration.

To filter court users, perform the following steps:

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

The *Approve New Users* page is displayed.

<input checked="" type="checkbox"/>	First Name	Last Name ^	Email Address	Role	Status

Figure 7.1 – Approve New Users Page

2. Type the user name or email address, or select a role from the drop-down list.
3. Click **Filter**.

The court users that meet your criteria are displayed.

Adding Court User Accounts

A Court Administrator can add court user accounts.

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

To add a new user account, perform the following steps:

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

The *Approve New Users* page is displayed.

2. Click **Court Users**.

The *Court Users* page is displayed.

Manage Users for Your Court

First Name Last Name Email Role Filter

First Name	Last Name ^	Email Address	Role	Status
Sam	Addison	sam.add@tt.com	Filer, Firm Admin	Unverified
Solomon	Atustuo	atustuo797@gmail.com	Filer	Active
Thomas	Based	te.based@tylertech.com	Filer	Active
John	Alloy	courts@times.com	Filer, Court Admin	Active

Add Court User

First Name* Middle Last Name* Email Address*

Roles

☐ Court Admin
 ☒ Filer
 ☐ Reviewer
 ☐ Judicial Disposition Officer
 ☐ Court User
 ☐ Attorney

Cancel Changes Save Changes

Figure 7.2 – Court Users Page

3. Click **Add Court User**.
4. Complete the required fields.
5. Assign a new court user role.

- Select the ☐ **Court Admin** check box to assign the Court Administrator role to the new user.
- Select the ☐ **Filer** check box to assign the Filer role to the new court user.
- Select the ☐ **Reviewer** check box to assign the Reviewer role to the new user.

- Select the ☐ **Judicial Disposition Officer** check box to assign the Judicial Disposition Officer role to the new user.
- Select the ☐ **Attorney** check box to assign the Attorney role to the new user.

Note: The Court User role is reserved for future use.

- 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 Court User Accounts

The Court Administrator can edit court user accounts.

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

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

The *Approve New Users* page is displayed.

- Click **Court Users**.

The *Court Users* page is displayed.

First Name	Last Name ^	Email Address	Role	Status
Sam	Addison	sam.add@tt.com	Filer, Firm Admin	Unverified
Solomon	Atustuo	atustuo797@gmail.com	Filer	Active
Thomas	Based	te.based@tylertech.com	Filer	Active
John	Alloy	courts@times.com	Filer, Court Admin	Active

Add Court User

First Name* Middle Last Name*

Email Address*

Roles

☒ Court Admin ☒ Filer ☐ Reviewer ☐ Judicial Disposition Officer

☐ Attorney

[Reset Password](#)

Cancel Changes **Save Changes**

Figure 7.3 – Court Users Page

- Click the court user that you want to edit.
- Edit the information for the specified user.
- Click **Save Changes** to save the changes and continue, or click **Cancel Changes** to cancel any changes made.

Deleting Court User Accounts

The Court Administrator can delete user accounts.

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

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

The *Approve New Users* page is displayed.

2. Click **Court Users**.

The *Court Users* page is displayed.

The screenshot shows the 'Manage Users for Your Court' interface. At the top, there are tabs: 'Approve New Users', 'Court Users' (selected), 'Attorneys', 'Payment Accounts', 'Court Information', and 'Unlock Envelope'. Below the tabs is a table of users:

First Name	Last Name ^	Email Address	Role	Status	
Sam	Addison	sam.add@tt.com	Filer, Firm Admin	Unverified	
Solomon	Atustuo	atustuo797@gmail.com	Filer	Active	
Thomas	Based	te.based@tylertech.com	Filer	Active	
John	Alloy	courts@times.com	Filer, Court Admin	Active	

Below the table is a section titled 'Add Court User' with a form. The form has fields for 'First Name*' (John), 'Middle' (empty), 'Last Name*' (Alloy), and 'Email Address*' (courts@times.com). There is a 'Reset Password' link. Below the form are checkboxes for 'Roles': 'Court Admin' (checked), 'Filer' (checked), 'Reviewer' (unchecked), 'Judicial Disposition Officer' (unchecked), and 'Attorney' (unchecked). At the bottom are 'Cancel Changes' and 'Save Changes' buttons.

Figure 7.4 – Court Users Page

3. Click the court 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.

8 Manage Court Attorney Accounts

Topics Covered in this Chapter

- ♦ Adding Court Attorney Accounts
- ♦ Editing Court Attorney Accounts
- ♦ Deleting Court Attorney Accounts

The Court Administrator is responsible for managing attorney accounts for the courts.

Adding Court Attorney Accounts

The Court Administrator can add attorneys to the court's user accounts or the attorney list.

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

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

The *Approve New Users* page is displayed.

2. Click **Attorneys**.

The *Attorneys* page is displayed.

First Name	Last Name ^	Attorney Number
Falworth	Dixon	55656
Jackson	Hughes	33636

Add Attorney

First Name* Jackson **Middle** **Last Name*** Hughes

Attorney Number* 33636

☒ Save Attorney as Court User

Roles

☐ Court Admin ☒ Filer

Email Address* jhughes@hughlawfirm.com

Cancel Changes **Save Changes**

Figure 8.1 – Attorneys Page

3. Click **Add Attorney**.

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

4. Type the attorney's first and last name in the fields provided.

5. Type the attorney number in the **Attorney Number** field.

Figure 8.2 – Attorney Number Field

6. Click **Verify** to verify that the attorney number is correct and registered with the court.

The *Verify Attorney Information* window opens, and the attorney information that is registered with the court is loaded.

Figure 8.3 – Verify Attorney Information Window

Note: If the attorney information is incorrect, click **No** to correct the information. This action opens the *Attorneys* page.

7. Select the ☒ **Save Attorney as Court User** check box to save the attorney as a court user (optional).
8. Assign the court attorney roles.

Figure 8.4 – Court User Roles

- Select the ☐ **Court Admin** check box to assign the Court Administrator role to the new attorney.
 - Select the ☒ **Filer** check box to assign the Filer role to the new attorney.
9. Type the attorney's email address in the **Email Address** field..

Email Address*

je@macafee.com

Figure 8.5 – Email Address Field

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

Editing Court Attorney Accounts

The Court Administrator can edit the attorney’s information on the *Attorneys* page.
To edit the information entered for each attorney, perform the following steps:

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

The *Approve New Users* page is displayed.

2. Click **Attorneys**.

The *Attorneys* page is displayed.

First Name	Last Name	Attorney Number
Falworth	Dixon	55656
Jackson	Hughes	33636

Add Attorney

First Name* Jackson **Middle** **Last Name*** Hughes

Attorney Number* 33636

☒ Save Attorney as Court User

Roles

☐ Court Admin ☒ Filer

Email Address* jhughes@hughlawfirm.com

Cancel Changes **Save Changes**

Figure 8.6 – Attorneys Page

3. Click the attorney that you want to edit.
4. Edit the information for the specified attorney.

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

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

Deleting Court Attorney Accounts

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

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

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

The *Approve New Users* page is displayed.

2. Click **Attorneys**.

The *Attorneys* page is displayed.

First Name	Last Name	Attorney Number
Falworth	Dixon	55656
Jackson	Hughes	33636

Add Attorney

First Name*

Middle

Last Name*


Attorney Number*

☒ Save Attorney as Court User

Roles
☐ Court Admin ☒ Filer

Email Address*

Figure 8.7 – Attorneys Page

3. Click the attorney that 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.

9 Manage Court Payment Accounts

Topics Covered in this Chapter

- ◆ Adding Court Payment Accounts
- ◆ Editing Court Payment Accounts
- ◆ Deleting Court Payment Accounts

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

Adding Court Payment Accounts

All courts are required to have a payment account. The Court Administrator adds payment accounts for the courts.

To add a payment account for your court, perform the following steps:

1. Click **COURT 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.

Payment Account Name	Payment Account Type	Active
Hughs (AMEX 0005)	Credit Card	Yes
Waiver	Waiver	Yes

Add Payment Account Refresh

Payment Account Name*
 Waiver

Payment Account Type*
 Waiver

☒ Active
☒ Available at all locations

Cancel Changes Save Changes

Figure 9.1 – 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 (credit card, draw down, or waiver) from the **Payment Account Type** drop-down list.

Add Payment Account Refresh

Payment Account Name*
 Chapel Hill Credit

Payment Account Type*
 Credit Card
 Credit Card
 Draw Down
 Waiver

Enter Credit Card Information

Cancel Changes Save Changes

Figure 9.2 – Payment Account Type Drop-Down List

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

Figure 9.3 – Draw Down Selection Window

- Select **Waiver** if the payment account is a waiver.
6. Click **Save Changes** to save the changes and continue, or click **Cancel** to cancel any changes that you made.

The payment account information is displayed at the top of the page.

Editing Court Payment Accounts

After 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 after it has been entered. Instead, delete the payment account, and add a new one.

To edit a payment account for your court, perform the following steps:

1. Click **COURT 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	
Hughs (AMEX 0005)	Credit Card	Yes	X
Waiver	Waiver	Yes	X

[Add Payment Account](#)
[Refresh](#)

Payment Account Name*

Payment Account Type*

☒ Active
☒ Available at all locations

[Cancel Changes](#)
[Save Changes](#)

Figure 9.4 – Payment Accounts Page

- Click the court payment account that you want to edit.
- Edit the payment account name or type as needed.
- Click [Save Changes](#) to save the changes and continue, or click [Cancel Changes](#) to cancel any changes that you made.

Deleting Court Payment Accounts

The Court Administrator is responsible for deleting payment accounts. To delete a payment account for your court, perform the following steps:

- Click [COURT ADMIN](#) on the *Home* page.
The *Approve New Users* page is displayed.
- Click **Payment Accounts**.
The *Payment Accounts* page is displayed.

Payment Account Name	Payment Account Type	Active	
Hughs (AMEX 0005)	Credit Card	Yes	
Waiver	Waiver	Yes	

[Add Payment Account](#)
[Refresh](#)

Payment Account Name*

Payment Account Type*

☒ Active
☒ Available at all locations

[Cancel Changes](#)
[Save Changes](#)

Figure 9.5 – Payment Accounts Page

- Click the payment account that you want to delete.
- Click next to the name to delete the payment account.
- Click [Save Changes](#) to save the changes and continue, or click [Cancel](#) to cancel any changes that you made.

The payment account information is deleted from the table at the top of the page.

10 Manage Court Information

Topics Covered in this Chapter

♦ Updating Court Information

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

Updating Court Information

Use the *Court Information* page to update your court's contact information, change how a new user registers to use the system, allow the users to self-register, or change the approval process.

To update court information, perform the following steps:

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

The *Approve New Users* page is displayed.

2. Click **Court Information**.

The *Court Information* page is displayed.

The screenshot shows the 'Court Information' page. The navigation bar at the top includes tabs for 'Approve New Users', 'Court Users', 'Attorneys', 'Payment Accounts', and 'Court Information'. The 'Court Information' tab is selected. The main content area is titled 'Court Information' and contains a form with the following fields: 'Name*' (Hamburg County Courthouse), 'Country*' (United States of America), 'Address Line 1*' (1234 Smith Avenue), 'City*' (Scyene), 'State*' (Texas), 'Zip Code*' (79902), and 'Phone Number*' (987-345-4323). Below the form is a section titled 'New User Registration' with two checkboxes: 'Allow Users to Self Register' (checked) and 'Require Administrator Approval of New User Registration' (unchecked). At the bottom of the form are two buttons: 'Cancel Changes' and 'Save Changes'.

Figure 10.1 – Court Information Page

3. Update the *Court Information* page as needed.

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

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

11 Expunging a Case

The Court Administrator can expunge cases that should be removed from the court record.

You must have “Court Administrator” rights to perform this action.

To expunge a case, perform the following steps:

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

The *Approve New Users* page is displayed.

2. Click **Expunge Case**.

The *Expunge Case* page is displayed.

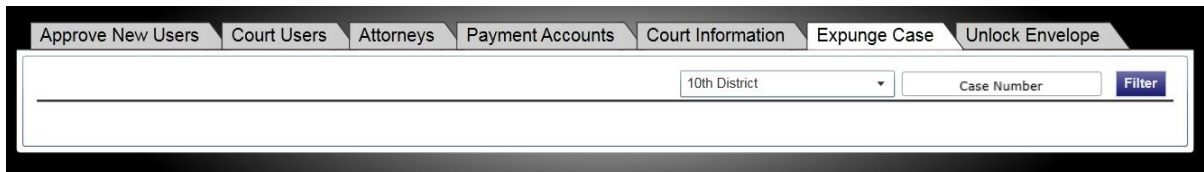
The screenshot shows a web application interface with a horizontal menu bar at the top. The menu items are: 'Approve New Users', 'Court Users', 'Attorneys', 'Payment Accounts', 'Court Information', 'Expunge Case' (which is highlighted), and 'Unlock Envelope'. Below the menu bar is a large white rectangular area. At the top of this area, there is a search filter section. It includes a dropdown menu currently showing '10th District', a text input field labeled 'Case Number', and a blue button labeled 'Filter'. Below these elements is a large, empty white box, presumably for displaying a list of cases.

Figure 11.1 – Expunge Case Page

3. Select a location from the drop-down list.
4. Type a case number in the **Case Number** field.
5. Click **Filter**.
6. Select **Expunge Cases**.
7. Confirm that you want to expunge the list of cases.

12 Unlocking an Envelope

The Court Administrator can unlock an envelope that has been locked by another Court Administrator working on the case.

You must have “Court Administrator” rights to perform this action.

To unlock an envelope, perform the following steps:

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

The *Approve New Users* page is displayed.

2. Click **Unlock Envelope**.

The *Unlock Envelope* page is displayed.

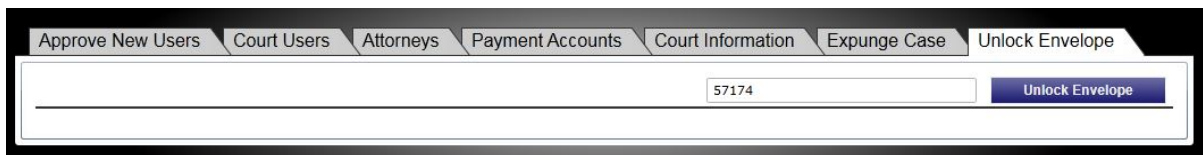


Figure 12.1 – Unlock Envelope Page

3. Type a case number in the blank field.

4. Click **Unlock Envelope**.

The *Envelope Unlocked* window opens, displaying the *Envelope successfully unlocked* message.

5. Click **Ok** to close the window and to continue working.

13 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@efiletxas.gov
Telephone	855.839.3453
GoTo Assist (Support)	Support may ask to assist you by sharing your screen using GoToAssist .