

eFileTexas.gov™

Individual Filer User Guide – Release 2017.1

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Publishing History

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

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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

This section lists the new features for Release 2017.1.

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

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

OFS MockCMS	- Forfeiture & S	Seizure			
Case Inform	ation 🔞 Part	iles 🔞 Filings 🔞 Service Cont	tacts 🕑 Summary		
Enter the D	etails for th	e Parties Involved in this	Case		
Party Type	Name		A	torney(s)	
Defendant Plaintiff					
ADD PARTY					7
🔲 I am this p	irty				
Defendant	•	Person 🔲 Business	Lead Altorney	•	
First Name*		Middle	Last Name*	Suffix	
Date of Birth	m/d/yyyy 15	Email Address ghost text for	or this		
Country United States	of America 👻	•			
Address Line					
Address Line					
City					
State		Zip Code			
Phone 🍙		· · · · · · · · · · · · · · · · · · ·	Filer ID		
				New Fields	
Drivers Licens	е Туре	Drivers License State	Drivers License Number		
Social Securit	/ Number	Gender	Interpreter		
		Ŧ		•	
Case Informatio	2				

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.

Case Information Parties Parties Service Contacts Summary	
	*
Enter Filing Details	
Add Another Filing Acknowledgement	
Filing Fee	\$0.00
Select Filing Code* Total this Filing	\$0.00
Acknowledgement Case Initiation Fee	\$0.00
Filing Description E-File Fee	\$1.00
Court Transaction Fee	\$1.00
Reference Number Payment Service Fee	\$0.05
Taxes (for non-court fees)	\$0.08
Optional Services Envelope Total	\$2.13
Broken Fee (\$10.00)	
Certined Copies (so.00) New Field	
Unce Pel raty (si 0.00) Add → Add → New Discover	•
Placeholder Savie2 ville Jon description to tripper brigger br	
Incontract of the and a single inclusion of angle inclusin of angle inclusion of angle inclusion of angle inclusion of ang	
Cons Darting Professional Filer Type	
Lacob Default	-
Melicse Plaintiff Party Responsible for Fees*	
Associate	•
← Disassociate	
Procedures / Remedies	
Lead Document* (1) Click to Browse Click to Browse	
Attachments 🕡 🗌 Garnishment	
Link to Browse Damages Sought	
Filing Comments	
Courtesy Copies 🕕	_
Parties	Service

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 filerspecified maximum amount, the Reviewer will be notified, and the change will not be accepted.

OFS MockCMS - Negligence Case Information Parties	Filings OService Contacts Summary	
Enter Filing Details Add Another Filing Select Filing Code* Addrowledgement Filing Description Reference Number Coptional Services Dottonal Services Dottona	ription to Ingger horizontal scrolling	Service Image: Service Image: Service
Documents		Procedures / Remedies
Lead Document* 🕕	Click to Browse	Class Action
Attachments (i)	Click to Browse	Garnishment Damages Sought
Filing Comments		▼
Courtesy Copies 👔		
Parties		Serv

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.

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

lcon	Description
0	View the service contact, filing, or template details.
	File into the case.
	Bookmark the case.
	Resume the draft envelope.
0	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.
0	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.

1	Case Information	2 Parties	3 Filings	Summary

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.

First Name*	Middle	Last Name*
Amanda	Т.	Watson
Email*	Administrative Copy 🥡	Firm Name
awatson@ops.gov	info@yourfirm.com	Madison-Green Law Firm
Country*		
United States of America 🔹		
Address Line 1*		
998877 Legal Way		
City*		
Montgomery		
State*	Zip Code*	
Vermont •	54433	
Phone		
876-555-1212		
Make this contact Public		

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 **I** to resume your filing.

/ Firm	All Statuses	All Locations	From Date	(YYYY> 15 Case or Envelope	Filter Expe
Case # 27-CV-	12-113 - DJE Plaintiff Biz Pro	Se Civ Discrim vs DJ	E Sarah LastName (Hedlund	l, Deborah)	28 E 🖿 🖬
Envelope # 4645 filed N	Aarch 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	
ase # 27-ET-	CV-12-12 - ()				2ª C 🖿 🛃
Envelope # 4643 filed N	/larch 21, 2012 at 2:39 PM by Devon Estes on behalf	of Mark Schwartz			
Envelope # 4643 filed N Status	Aarch 21, 2012 at 2:39 PM by Devon Estes on behalf Filing Code	of Mark Schwartz Filing Type	Filing Description	Reference Number	
Envelope # 4643 filed N Status Accepted	March 21, 2012 at 2:39 PM by Devon Estes on behalf Filing Code Affidavit and Order for Dismissal	of Mark Schwartz Filing Type EFile	Filing Description Power of Atty	Reference Number DJE 1/1	
Envelope # 4643 filed M Status Accepted Case # 27-CV- Envelope # 4595 filed M	Aarch 21, 2012 at 2:39 PM by Devon Estes on behalf Filing Code Affidawit and Order for Dismissal 12-113 - DJE Plaintiff Biz Pro Aarch 15, 2012 at 11:43 AM by Devon Estes on behalf	of Mark Schwartz Filing Type EFile Se Civ Discrim vs DJ	Filing Description Power of Atty E Sarah LastName (Hedlund	Reference Number DJE 1/1 I, Deborah)	# C • .
Envelope # 4643 filed N Status Accepted Case # 27-CV- Envelope # 4595 filed N Status	Aarch 21, 2012 at 2:39 PM by Devon Estes on behalf Filing Code Affidavit and Order for Dismissal 12-113 - DJE Plaintiff Biz Pro Aarch 15, 2012 at 11:43 AM by Devon Estes on behalf Filing Code	of Mark Schwartz Filing Type EFile Se Civ Discrim vs DJ If of Mark Schwartz Filing Type	Filing Description Power of Atty E Sarah LastName (Hedlund Filing Description	Reference Number DJE 1/1 I, Deborah) Reference Number	2 G 🖿 📄 🗖
Envelope # 4643 filed N Status Accepted Case # 27-CV- Envelope # 4595 filed N Status Rejected	Aarch 21, 2012 at 2:39 PM by Devon Estes on behalf Hing Code Affidavit and Order for Dismissal 12-113 - DJE Plaintiff Biz Pro Aarch 15, 2012 at 11:43 AM by Devon Estes on beha Filing Code Amended Petition	of Mark Schwartz Filing Type EFile See Civ Discrim vs DJ If of Mark Schwartz Filing Type EFileAndServe	Filing Description Power of Atty E Sarah LastName (Hedlund Filing Description amended pet	Reference Number DJE 1/1 I, Deborah) Reference Number 1/3 EFS	<u> </u>
Envelope # 4643 filed M Status Accepted Case # 27-CV- Envelope # 4595 filed M Status Rejected Rejected	Aarch 21, 2012 at 2:39 PM by Devon Estes on behalf Iting Code Affidavit and Order for Dismissal 12-113 - DJE Plaintiff Biz Pro Aarch 15, 2012 at 11:43 AM by Devon Estes on behalf Filing Code Amended Petition Notice of Withdrawal of Counsel	of Mark Schwartz Filing Type EFile If of Mark Schwartz Filing Type EFileAndServe EFile	Filing Description Power of Alty E Sarah LastName (Hedlund Filing Description amended pet notice of withdrawal of counsel	Reference Number DJE 1/1 I, Deborah) Reference Number 1/3 EFS 2/3 EFO	

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. **1** Note: That user does not exist.

No Security question on File – No security question on file for (user name). **1** 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. **1** 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.

Case Information	Parties	Filings	Summary	
Enter the Detail	s for the N	lew Case	•	?
Required fields are bold a	and have an ast	erisk (*).		_
Select Location*				
			v	
Select Category*				
			Required Field	
Select Case Type*				
			_	
Short Title				
			?	
Filing Attorney*				
			•	
Payment Account*				
			v	
Exit				Parties

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.

Zip*	
654656	Invalid Zip Code



2 E-Filing Overview

Topics Covered in this Chapter

Filing Queue Status

This section describes the e-filing process.



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 <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.

EFILE. TXCOURTS.gov		
Email Addres	MESSAGE OF THE DAY Machine Content of Co	a number of added benefits including the ability to access eFileTexas on your tablet or phone, enabling copy, patte, sorting and fechnology (DCIT) has developed a set of Technology Standards. for a complete implementation urts.gov urts.gov urts.gov to I I Want to Register as a tant to Register as a
LEARN Constitution - PCs Constitution - PCs Constitution - Marcs Constitution - Marc	TRAIN Fees Training Sessions Web Training Sessions Self-study Colline Training Training Videos for eFile TXCourts any Continuing Legal Education Credit *Attention Attorneys - Register/Attend a CLE Accredited unbinger arrowed by Wide Targer State Broard of Constitution	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.

1 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.

1 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?**

1 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.

Password	
	_
📃 Keep me logged in 🊯	
	LOGIN
Forgot Password?	Register Now

To reset your password, perform the following steps:

1. Click Forgot Password? on the Login window.

The Reset Password window is displayed.

Reset Password		
Reset Passw	vord	
Enter your emai your password.	il address and answer your security question to re	set
Email Address	l	Next
Cancel		Ok

Figure 4.2 – Reset Password – Email Address

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

1 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: <code>Your password has been changed successfully</code> .

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.

Email Address			_
Password			
🔲 Keep me lo	ogged	in 🚯	
			LOGIN

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.

WORKSPACE MY ACCOUNT ADMIN INFO ABOUT LOGOUT

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.

Firm	All Statuses All	Locations •	From Date <m d="" yyyy=""> 15 To Date <m d="" th="" y<=""><th>YYY> 15 Case or Envelope</th><th>Filter Ex</th></m></m>	YYY> 15 Case or Envelope	Filter Ex
ase # 27-CV-	12-113 - DJE Plaintiff Biz Pro S	Se Civ Discrim vs DJ	E Sarah LastName (Hedlund	, Deborah)	22 🖸 🗖 🗖
Envelope # 4645 filed N	larch 21, 2012 at 3:48 PM by Devon Estes on behalf o	f Beth Lewandowski			
Status	Filing Code	Filing Type	Filing Description	Reference Number	
ccepted	Judgment	EFileAndServe	Judg	EFS	
	CV 40 40 ()				
ase # 21-E1-	GV-12-12 - ()				
Envelope # 4643 filed N	larch 21, 2012 at 2:39 PM by Devon Estes on behalf o	f Mark Schwartz			
tatus	Filing Code	Filing Type	Filing Description	Reference Number	
ccepted	Affidavit and Order for Dismissal	EFile	Power of Atty	DJE 1/1	
260 # 27-CV-	12-113 - D IE Plaintiff Biz Pro	Se Civ Discrim vs D I	E Sarah LastName (Hedlund	Deborah)	
ase # 27-CV-	12-113 - DJE Plaintiff Biz Pro S	Se Civ Discrim vs DJ	E Sarah LastName (Hedlund	, Deborah)	2ª 🖸 🖿 📕 🛛
ase # 27-CV-	12-113 - DJE Plaintiff Biz Pro S farch 15, 2012 at 11:43 AM by Devon Estes on behalf	Se Civ Discrim vs DJ	E Sarah LastName (Hedlund	, Deborah)	¥ C = # .
ase # 27-CV- nvelope # 4595 filed M tatus	12-113 - DJE Plaintiff Biz Pro S farch 15, 2012 at 11:43 AM by Devon Estes on behalf Filing Code	of Mark Schwartz Filing Type	E Sarah LastName (Hedlund	Reference Number	
ase # 27-CV- nvelope # 4595 filed N tatus ejected	12-113 - DJE Plaintiff Biz Pro S arch 15, 2012 at 11:43 AM by Devon Estes on behalf Filing Code Amended Petition	of Mark Schwartz Filing Type EFileAndServe	E Sarah LastName (Hedlund Filing Description amended pet	Reference Number 1/3 EFS	3å C 🖿 💭 .
ASE # 27-CV- welope # 4595 filed N atus ejected ejected	12-113 - DJE Plaintiff Biz Pro S farch 15, 2012 at 11:43 AM by Devon Estes on behalf Filing Code Armended Petition Notice of Withdrawal of Counsel	Se Civ Discrim vs DJ of Mark Schwartz Filing Type EFileAndServe EFile	E Sarah LastName (Hedlund Filing Description amended pet notice of withdrawal of counsel	Reference Number 1/3 EFS 2/3 EFO	2Å C 🖿 🗐 .

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.

NEW CASE	• ?	Case Number	Go Advanced Search
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

- Creating a Template
- Editing a Template
- Deleting a Template

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

FILINGS BOOKMARKS TEMPL	ATES SERVICE CONTACTS			
				NEW TEMPLATE
My Favorites	✓ All Locations	✓ All Case Types	✓ All Filing Codes	▼ Filter
Template 5045 - Sampl	e Template			× C • V ×
Template created April 11, 2017 at 2:09	PM by Individual Filer			
Location	Case Type	Filing Code		
OFS QA 2012	Damages	N/A		
		Id deateb. N		
		¶ ¶1011₽ ₽		

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.

1 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 details.
- Click to file using an existing template.
- Click I 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.

FILINGS BOOKMARKS TEM	PLATES SERVICE CONTACTS			
				NEW TEMPLATE
My Favorites	All Locations	✓ All Case Types	 All Filing Codes 	▼ Filter
Template 5045 - Samp	ole Template			× C • V ×
Template created April 11, 2017 at 2:	09 PM by Individual Filer			
Location	Case Type	Filing Code		
OFS QA 2012	Damages	N/A		
		📢 📢 1 of 1 🕨 🕨		

Figure 7.2 – Templates Page

3. Click NEW TEMPLATE

The Case Information page is displayed.

4. Complete the fields on the Case Information page.

1 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.

FILINGS BOOKMARKS TEMPLATES SERVICE CO	ONTACTS		
			NEW TEMPLATE
My Favorites 🔹	All Locations	All Case Types 🔹	All Filing Codes
Template 5045 - Sample Template			
Template created April 11 2017 at 2:09 PM by Individual Filer			
Location Case	Type	Filing Code	
OFS QA 2012 Dama	iges .	N/A	
	I4		

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.

FILINGS BOOKMARKS TEM	PLATES SERVICE CON	TACTS			
				NEW TE	EMPLAT
My Favorites	•	All Locations -	All Case Types 🔹	All Filing Codes	Filte
Template 5045 - Sam	ole Template				
Template created April 11, 2017 at 2	09 PM by Individual Filer				
Location	Case Ty	pe	Filing Code		
OFS QA 2012	Damage	15	N/A		
		I	1 of 1		

Figure 7.4 – Templates Page

- 2. Select the template that you want to delete from the list.
- 3. Click the Delete Template (¹¹) icon.

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



Go Advanced Search

Click **NEW CASE** to open the *Case Information* page and to begin the case initiation process for e-filing. **1** 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



The Case Information page is displayed.

• Note: An asterisk (*) indicates required fields.

Case Information 🔞 Parties 🔞 Filings 🚳 Service Contacts 🚳 Summary	
nter the Details for the New Case	
squired fields are bold and have an asterisk (*).	
relect Location*	
relect Category"	
relect Case Type"	
hort Title 🕡	
ilerType	
-	
ayment Account*	
_	
xit	Parties

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 D.

Entering Party Details

Each case requires a party type.

rockCMS - Forfeiture &	Seizure		
Case Information 🛛 🔞 Part	tles 🔞 Filings 🚳 Service Contacts 🙆 Su	mmary	
	- Bentles land bed in this game		
mer me Details for m	e Parties involved in this case		
Party Type Name		Attorney(s)	
Defendant			
Plaintiff			
ADD PARTY			
			Г
I am this party			
Party Type* 🕕	Lead Attorney		
Defendant -	V Person Business	÷	
First Name*	Middle Last Name*	Suffix	
		•	
Date of Birth	Email Address		
	ghost text for this		
United States of America	•		
Address Line 1			
Address Line 2			
City			
State	Zip Code		
Phone (i)	filer ID		
Drivers License Type	Drivers License State Drivers License	Number	
Casial Conucity Number	Conder		
Social Security Number	Gender Interpreter	•	
			-
Case Information			

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.

1 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.

1 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.

1 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.

Class A	•
Class AM	
Class B	
Class BM	=
Class C	
Class CM	
Class D	
Class M	
Commercial Drivers License A	
Commercial Drivers License B	
Commencial Driverse Linearce O	-
-	

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** dropdown 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.

Gender	
	•
Female	
Male	
Unknown	

Figure 8.7 – Gender Drop-Down List

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

Interpreter	
	•
American Sign Language	
English	
French	
Japanese	
Polish	
spanish	

Figure 8.8 – Interpreter Drop-Down List

19. If you want to add another party to the filing, click ADD PARTY, a required fields.

, and enter the party information in the

• 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.

nvelope 35489	Case CC-15-230 OFS QA 2013 - Co	urt at Law 2 - Appeal				
Derties 2	Filings 🔞 Summary					
Enter the De Required fields are	etails for the Parties Involv bold and have an asterisk (*).	red in this Case				
Party Type	Name		Attorney			
Defendant	Jane Defendant		Pro Se			
Plaintiff	John Plaintiff					
ADD PARTY Party Type: [Party Name:]	Defendant Iane Defendant	Attorney Pro Se	v	1612 additional partie	s excluded due to system co	onstraints.
Exit						Filings

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.

and a second			
			© Fees
ld Another Filing			Acknowledgement
			Filing Fee
elect Filing Code*			Total this Filing
cknowledgement		▼ E-File Service	Case Initiation Fee
iling Description			E-File Fee
			Court Transaction Fee
eference Number			Taxes (for non-court fees)
		?	Envelope Total
ptional Services		Selected Optional Services	Baymont
Iroken Fee (\$10.00)			@ r ayment
ertified Copies (\$8.00)	Ŵ		Payment Account*
nce Per Party (\$10.00)	$Add \rightarrow$		Visiwar
aceholder Service 1			Filer Type
aceholder Service 2 with a long de	ascription to trigger horizontal scrolling - Remove		Liefault
aceholder Service 3	•		
ase Parties		Parties Associated	
John Plaintiff			
lary Defendant			Procedures / Remedies
	Associate \rightarrow		Appeal
			Class Action
	+ Disassociate		Garrishment
		1	Damages Sought
curpente.			Over \$5000 *
Lead Document*	Andreis Colories Fell 2017 ett		
	195.5 kb	8	
	Description	Security	
	Academic_Calendar_Fall_2017.pdf	•	

	Click to Browse		
ing Comments			
ing Comments			
iing Comments ourtesy Copies (j)			
Filing Comments Iourtesy Copies (j) reliminary Copies (j)			
eliminary Copies]	

5 5 5

- 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 _____ to attach the file.

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

Documents					
Lead Document* 🛈	3.14_DrawDownAccountBalance_Release Document file name is too long. Max length is 40 characters.				
	Description Brief w/ Docket Service	Security Confidential (T)	•		
Attachments 🕡	Click to Browse				

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.

1 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.

Documents		
Lead Documents*	3.1_FAQ_Basics.pdf 83.7 kb	×
	Description	
	3.1_FAQ_Basics.pdf	✓ Confidential
Attachment Documents	Add More Documents	
	3.1_FAQ_Formatting Errors.pdf 67.6 kb	×
	Description	
	3.1_FAQ_Formatting Errors.pdf	✓ Confidential

Figure 8.12 – Uploading an Attachment

- c. Click _____ 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.



Less than \$100,000, including damages of any kind, per $\,$ \star

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.

1 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.

OFS MockCMS - Negligence		
 Case Information Parties 	🛿 Filings 🕜 Service Contacts 💿 Summary	
Enter Filing Details		· Fees
Add Another Filing		Acknowledgement
		Filing Fee \$0.00
Select Filing Code*		Total this Filing \$0.00
Acknowledgement		✓ E-File Service Case Initiation Fee \$0.00
Filing Description		E-File Fee \$1.00
		Court Transaction Fee \$1.00
Reference Number		Payment Service Fee \$0.05
		Taxes (for non-court fees) \$0.08
Optional Services	Selected Optional Services	Envelope Total \$2.13
Broken Fee (\$10.00)		
Certified Copies (\$6.00)	U U	Payment
Once Per Party (\$10.00)	$Add \rightarrow$	Payment Account*
Placeholder Service 1		New Discover 🔹
Placeholder Service 2 with a long descri	iption to trigger horizontal scrolling	Fees Not To Exceed
Placeholder Service 3	•	
Case Parties	Parties Associated	Filer Type
Joseph Defendant		Default
Melissa Plaintiff		Party Responsible for Fees*
	Associate →	•
	← Disassociate	
Documents		Procedures / Remedies
Lead Document* 🕕		Appeal
	Click to Browse	Class Action
Attachments (i)	Click to Browse	Damages Sought
Filing Comments		•
Countrary Consists (0)		
Courtesy Copies U		l
Parties		Service

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 _____ 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.

1 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.

Documents (i)		
Lead Documents*	3.1_FAQ_Basics.pdf 83.7 kb	×
	Description 3.1_FAQ_Basics.pdf ?	✓ Confidential
Attachment Documents	Add More Documents	
	3.1_FAQ_Formatting Errors.pdf 67.6 kb	×
	Description	
	3.1_FAQ_Formatting Errors.pdf	✓ Confidential

Figure 8.16 – Uploading an Attachment

- c. Click cpen 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.

Case Information Parties	Filings Service Contacts Service for this Envelope	Summary	
Select Contacts to Receive	Service for this Envelope		
Select All Service Contacts			
 Search Warrant Property: Jan Bond Depositor: County Bond Defendant: Meilin Wong Plaintiff: Antonio Adrienny O Other Service Contacts 	nice Market J		
Add New Add From Master List	Add From Public List Middle	Last Name*	
Email*	Administrative Copy (j)	Firm Name	
Country			
Address Line 1	•		
City			
Region	Zip Code		
Phone			
Make this contact Public			
Save Contact in My Firm Master Servi	ce List		Summa

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.

1 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.

Case sk10171509 3rd District (N	on-Integrated) - Abuse & Neglect								
O Parties @ Filings @ S	ervice Contacts O Summary								
Envelope and Filing Su	mm30/								
Envelope and Filling ou	initial y					-	Fees		
Case Information						Eat	ADDITIONAL VOLUME		
Location: Case Category: Case Type:	3rd District (No Family - FAM Abuse & Negle	on-Integrated)	Filing Attorney: Payment Account:	Test Firm Test Walv	Attorney Br			E-File Fee Court Transaction Fee	\$0.00 \$0.00 \$0.00
Date Filed:								Total this Filing	\$0.00
Parties						Edit 💿		Envelope Total	\$0.00
Party Type	Name	Address		Phone	Attorney		Payment		
In the Matter of Child	asdi asdi				Test Filer	-	Payment Account*		
Petitioner	asdf asdf						Test Walver		•
Respondent	asdf asdf				Pro Se		Filer Type		
Aborney	Connor Law & Associates	21010 San Fernando Lane			test r intedoriey		Default		•
3rd Party Defendant	Jackson J Jones	Suite 1090 San Antonio, TX 55502		8589896565	Pro Se		Party Responsible for Fees*		
							00000000000		
Filings						Edit 💿	Filing Attorney		
Electron de la		Films Description		Defense Harris	Films Trees		Filing Attorney*		
Filing Code		Filing Description		Reference Number	Filing type		Test FirmAttorney		•
ADDITIONAL VOLUME		wotion to Utsmiss		18/18/	EFICATOSEVE				
Lead Document	File Name			Status	Security				
	Welcome to Tyler University.pdf			Ok	Condifertial Documents				
Courtesy Copies:	john@law.com								
Preliminary Copies:	judge@state.gov								
Filing Comments:	Petitoner requesting dismissai								
Service Contacts						Edit 🙆			
Name (Email)			Service Type						
In the Matter of Child: asc	lf asdf								
Service Contact Four (s	o4@tylertech.com)		EServe						
Service Contact Modifie	d Two (sc2@tylertech.com)		EServe						
Petitioner: asdf asdf									
Respondent: asdf asdf									
Attorney: Connor Law & A	Associates								
Other Service Contacts	Son 2 Jones								
Parties with no Contact	s for eService					Edit 💿			
Name		Address							
asdf asdf									
Connor Law & Associates									
Jackson J Jones		21010 San Fernando Lane Suite 1090							
		San Antonio, TX 56502							
Service									Submit

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.

1 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.



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.

1 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.

ase Number	Description	Actions
1-000131-CK	Brown, Jane v Black, Jane	

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.

1 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 Sort	ed by* Case Number				
Reset	Cancel Search				

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.

1 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.

Advanced Search						
Search by Party	Name					
Location*	All Locations	•				
Person	✓ Business					
Business Name*						
Case Type*	All Case Types	•				
Show Results Sorte	ed by* Case Number 🔹					
Reset		Cancel Search				

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.

1 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.

LINGS BOOKMAR	RKS TEMPLATES SERVICE CONTACTS				
y Firm	All Statuses All	ocations •	From Date </th <th>/YYY> 15 Case or Envelope</th> <th>Filter Export</th>	/YYY> 15 Case or Envelope	Filter Export
Case # 27-CV	-12-113 - DJE Plaintiff Biz Pro S	e Civ Discrim vs D	JE Sarah LastName (Hedlund	l, Deborah)	2ª C 🖿 🗖
Envelope # 4645 filed I	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- Envelope # 4643 filed I	-CV-12-12 - () March 21, 2012 at 2:39 PM by Devon Estes on behalf of	Mark Schwartz			2ª C 🖿 🗖
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 S	e Civ Discrim vs D	JE Sarah LastName (Hedlund	l, Deborah)	24 C 🖿 🖉 🗖
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	
		I4 4	1 of 5 🕨 🕨		

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.

1 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.

1 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.

s: Case Nur	nber				
Case Number	Location	Description		Case Type	Actions
CV-000241-2015	4th District Santa Rosa (QA-2012-NM)	Penny Plaintiff wants something fro	om Dennis Defendant	OFS Civil	
				Start a new subsequent	filing for this
				2 .	

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 Go.

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 nonbidirectional 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.

		NEW CASE	3rd District (Non-Integrated)	· 12345	? Go A	dvanced Search
Searching As: Case N	for: 12345 Number					
Case Num	Location	Description			Case Typ	Actions
12345	3rd District (Non-Integrated)				Administrativ	
12345	3rd District (Non-Integrated)				Administrativ	
		File Into	Case Not Listed			

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

① 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 NEW CASE

NEW CASE	•	?	Case Number	Go	Advanced Search
Figure 10.5 – New	Case Link				

The Case Information page is displayed.

1 Note: An asterisk (*) indicates required fields.

Envelope 32471 C	DFS QA 2014 -	Appellate Case	e		
Case Information	Parties	3 Filings	Service Contact	s 5 Summary	
Enter the Deta	ils for the l	New Case			
Required fields are bol	d and have an as	terisk (*).			
Select Location*					
OFS QA 2014			•		
Select Category*					
Appellate			•		
Select Case Type*					
Appellate Case			•		
Lower Court Case	Number*				
111111					
Lower Court Case De	escription				
Petition for Reivew					
Lower Court Name	*				
Johnson County					
Lower Court Case Ju	dge				
Judge Ray Parker					
Filer Type					
AutoReview			•		
Payment Account*					
Waiver			•		•
Exit					Parties

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.

1 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 Parties to sav

to save the case information and continue.

11 My Account

Topics Covered in this Chapter

- Changing the User Password
- Changing the Security Question
- Adding Payment Accounts
- ♦ Updating User Information
- Managing Email Notifications

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.

1 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.

Change Password Payment Accounts My Information Manage Notificatio	15
Login - Change Password	
Old Password*	
New Password*	
Re-enter New Password*	
Security Question*	
Security Answer	
Cancel Save	

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.

Change Password Payment Accounts	My Information Manage Notifications		
Payment Accounts			
Payment Account Name	Payment Account Type	Active	
Jane's Credit Card (DISCOVER 0413)	Credit Card	Yes	X
Jane's Waiver Account	Waiver	Yes	
Drawdown	Draw Down	Yes	
Add Payment Account Refresh			
Capacit			

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.

Cash		
Payment Accou	unt Type*	*
Cash		•
🖌 Active		
🗸 Available at a	all location	ns



• Select **Credit Card** if the payment account is a credit card. Click **Enter Credit Card Information** to enter the credit card information. **1** 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

to select a draw-down account. The Draw Down selection

Enter Draw Down Information

window is displayed

Payment Account Name*	
Islip County Draw Down	
Payment Account Type*	
Draw Down Enter Draw Down Information	
-Guadalupe County	A
Harding County in Roy	
Hatch	
Hildago County in Lordsburg	
Hobbs	
Jal Circuit	
Las Cruces	
Las Vegas 4th District	_
	•

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. I Note: The check box is displayed when you select the Waiver payment account type.

Active

- 6. Select the 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.

Change Password Payment	Accounts My Inform	nation Manage Notific	ations
· · · · · · · · · · · · · · · · · · ·			
My User Information			
[
First Name*	Middle	Last	Name*
Empil Addross*		Filer	
IndividualFiler@tylertech.com			
Contact Information			
Countrat			
United States of America	*		
Address Line 1*			
5101 Tennyson Pkwy			
Address Line 2			
City*			
Plano State*	Zin Code*		
Texas	 75024 		
Phone Number* 123 123 1234			
L			
[
Cancel Save			
iguro 11 7 – My	Informati	on Dago	
igure 11.7 – My	mormati	unraye	

- 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.

	CATES SERVICE CONTACT	ſS		
Refresh				
Case Number	Location	Description	Actions	
CC-15-1597	OFS QA 2012		E X 4	

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 ¹² in the **Actions** column on the *Bookmarks* page.

13 Filings

Topics Covered in this Chapter

- Filtering the Filings Queue
- Exporting E-Filing Transactions
- Copying the Envelope
- Viewing the Envelope Details
- Resuming the Filing Process
- Canceling a Filing

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.

LINGS BOOKMARK	(S TEMPLATES SERVICE CONTAC	тз			
/ly Firm	▼ All Statuses ▼	All Locations	From Date </th <th>I/d/yyyy></th> <th>e Filter Expor</th>	I/d/yyyy>	e Filter Expor
Case # 27-CV-	12-113 - DJE Plaintiff Biz P	ro Se Civ Discrim vs DJ	IE Sarah LastName (Hedlu	nd, Deborah)	***
Draft # 4501 started Mar	rch 09, 2012 at 12:37 PM by Devon Estes on be	nalf of Mark Schwartz			
Status	Filing Code	Filing Type	Filing Description	Reference Number	
Draft	Memorandum and Affidavit	EFileAndServe	DJE Civ memo and Aff	filing 1/3	0
Draft	Motion for Review	EFileAndServe	Civ Mot for Rev	filing 2/3 EFS	0
Envelope # 4496 filed M Status	arch 09, 2012 at 12:30 PM by Devon Estes on b Filing Code	ehalf of Mark Schwartz Filing Type	Filing Description	Reference Number	
Accepted	Stipulation	EFile	Stipulation	civil test file set up	
Case # 27-FA-1	12-25 - ()				¥ C 🖿 🖡
Envelope # 4494 filed M	arch 09, 2012 at 12:04 PM by Devon Estes on b	ehalf of Beth Lewandowski			
Status	Filing Code	Filing Type	Filing Description	Reference Number	
Accepted	Petition for Custody	EFile	DJE Pet for Cust EFO	Filing 1/3	
Rejected	Petition for Review of Decision of C	Court of Appe EFileAndServe	DJE Petition for Review of Decision	of Court of. Filing 2/3	
		I4 4	1 of 5 🕨 🕨		

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).

From Date	<m 0<="" th=""><th>l/yyy</th><th>γy></th><th>15</th><th>То</th><th>Dat</th><th>e < </th><th>M/d/yyyy></th></m>	l/yyy	γy>	15	То	Dat	e <	M/d/yyyy>
	•	0	cto	ber,	201	1	•	
	Su	Мо	Tu	We	Th	Fr	Sa	
ckson	25	26	27	28	29	30	1	
3	2	3	4	5	6	7	8	R
	9	10	11	12	13	14	15	1
	16	17	18	19	20	21	22	
	23	24	25	26	27	28	29	1
	30	31	1	2	3	4	5	

Figure 13.2 – Select the Dates from the Calendar

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

y Firm	All Statuses	All Locations	From Date <m d="" yyyy=""> 15 To Date <m d<="" th=""><th>/yyyy> 15 Case or Envel</th><th>ppe Filter Exp</th></m></m>	/yyyy> 15 Case or Envel	ppe Filter Exp
ase # 27-CV	-12-113 - DJE Plaintiff Biz Pro	Se Civ Discrim vs DJ	E Sarah LastName (Hedlun	d, Deborah)	X # E = E >
raft # 4501 started M	arch 09, 2012 at 12:37 PM by Devon Estes on behal	If of Mark Schwartz			
status	Filing Code	Filing Type	Filing Description	Reference Number	
)raft	Memorandum and Affidavit	EFileAndServe	DJE Civ memo and Aff	filing 1/3	0
Draft	Motion for Review	EFileAndServe	Civ Mot for Rev	filing 2/3 EFS	0
ase # 27-CV	-12-113 - DJE Plaintiff Biz Pro March 09, 2012 at 12:30 PM by Devon Estes on beh	Se Civ Discrim vs DJ alf of Mark Schwartz	E Sarah LastName (Hedlun	d, Deborah)	38 E 🖿 E
ase # 27-CV nvelope # 4496 filed	-12-113 - DJE Plaintiff Biz Pro March 09, 2012 at 12:30 PM by Devon Estes on beh Filing Code	alf of Mark Schwartz Filing Type	E Sarah LastName (Hedlun	d, Deborah) Reference Number	3Å 🖸 🖿 🗖
ase # 27-CV Envelope # 4496 filed Status Accepted	-12-113 - DJE Plaintiff Biz Pro March 09, 2012 at 12:30 PM by Devon Estes on beh Filing Code Stipulation	D Se Civ Discrim vs DJ alf of Mark Schwartz Filing Type EFile	E Sarah LastName (Hedlun Filing Description Stipulation	d, Deborah) Reference Number civil test file set up	2 2 2
ase # 27-CV Envelope # 4496 filed Status Accepted	-12-113 - DJE Plaintiff Biz Prc March 09, 2012 at 12:30 PM by Devon Estes on beh Filing Code Stipulation	D Se Civ Discrim vs DJ alf of Mark Schwartz Filing Type EFile	E Sarah LastName (Hedlun Filing Description Stipulation	d, Deborah) Reference Number civil test file set up	# C • .
The second secon	-12-113 - DJE Plaintiff Biz Prc March 09, 2012 at 12:30 PM by Devon Estes on beh Filing Code Stipulation -12-25 - () March 09, 2012 at 12:04 PM by Devon Estes on beh	D Se Civ Discrim vs DJ laff of Mark Schwartz Filing Type EFile aff of Beth Lewandowski	E Sarah LastName (Hedlun Filing Description Stipulation	d, Deborah) Reference Number civil test file set up	#G • #G •
ase # 27-CV. Envelope # 4496 filed I Status Accepted Tase # 27-FA- Envelope # 4494 filed I Status	-12-113 - DJE Plaintiff Biz Prc March 09, 2012 at 12:30 PM by Devon Estes on beh Filing Code Stipulation -12-25 - () March 09, 2012 at 12:04 PM by Devon Estes on beh Filing Code	D Se Civ Discrim vs DJ walf of Mark Schwartz Filing Type EFile alf of Beth Lewandowski Filing Type	E Sarah LastName (Hedlun Filing Description Stipulation	d, Deborah) Reference Number civil test file set up Reference Number	
Case # 27-CV. Envelope # 4496 filed I Status Accepted ase # 27-FA- Envelope # 4494 filed I Status Accepted	-12-113 - DJE Plaintiff Biz Prc March 09, 2012 at 12:30 PM by Devon Estes on beh Filing Code Stipulation -12-25 - () March 09, 2012 at 12:04 PM by Devon Estes on beh Filing Code Petition for Custody	alf of Beth Lewandowski Filing Type EFile EFile EFile EFile EFile	E Sarah LastName (Hedlun Filing Description Stipulation Filing Description DJE Pet for Cust EFO	d, Deborah) Reference Number civil test file set up Reference Number Filing 1/3	
Case # 27-CV. Envelope # 4496 filed I Status Accepted Case # 27-FA- Envelope # 4494 filed I Status Accepted Rejected	-12-113 - DJE Plaintiff Biz Prc March 09, 2012 at 12:30 PM by Devon Estes on beh Filing Code Stipulation -12-25 - () March 09, 2012 at 12:04 PM by Devon Estes on beh Filing Code Petition for Castody Petition for Review of Decision of Cou	D Se Civ Discrim vs DJ half of Mark Schwartz Filing Type EFile alf of Beth Lewandowski Filing Type EFile tr of Appe EFileAndServe	E Sarah LastName (Hedlun Filing Description Stipulation Filing Description DJE Pet for Cust EFO DJE Petition for Review of Decision o	d, Deborah) Reference Number civil test file set up Reference Number Filing 1/3 f Court of. Filing 2/3	

Figure 13.3 – Filings Page

1 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.

LINGS BOOKMAR	KS TEMPLATES SERVIC	E CONTACTS			
1y Firm	✓ All Statuses	All Locations	From Date M/d/yyyy> IS To Date	15 Case or Envelop	pe Filter Expo
Case # 27-CV-	12-113 - DJE Plaint	iff Biz Pro Se Civ Discrim vs DJ	E Sarah LastName (Hedlund, De	borah)	× # E = E >
Draft # 4501 started Ma	rch 09, 2012 at 12:37 PM by Devo	n Estes on behalf of Mark Schwartz			
Status	Filing Code	Filing Type	Filing Description	Reference Number	
Draft	Memorandum and A	ffidavit EFileAndServe	DJE Civ memo and Aff	filing 1/3	0
Draft	Motion for Review	EFileAndServe	Civ Mot for Rev	filing 2/3 EFS	0
Envelope # 4496 filed M Status	larch 09, 2012 at 12:30 PM by Dev Filing Code	ron Estes on behalf of Mark Schwartz Filing Type	Filing Description	Reference Number	
Accepted	Stipulation	EFile	Stipulation	civil test file set up	
Case # 27-FA-	12-25 - ()	en Estes en koholf of Dalk Lowendowski			\$ C = 2.
Case # 27-FA-	12-25 - () arch 09, 2012 at 12:04 PM by Dev	on Estes on behalf of Beth Lewandowski	Filing Description	Reference Number	38 G 🖿 📕
Case # 27-FA- Envelope # 4494 filed M Status Accepted	12-25 - () larch 09, 2012 at 12:04 PM by Dev Filing Code Petition for Custody	ron Estes on behalf of Beth Lewandowski Filling Type E File	Filing Description DJE Pet for Cust EFO	Reference Number Filing 1/3	# C = .
Case # 27-FA- Envelope # 4494 filed M Status Accepted Rejected	12-25 - () larch 09, 2012 at 12:04 PM by Dev Filing Code Petition for Custody Petition for Review o	ron Estes on behalf of Beth Lewandowski Filing Type EFile I Decision of Court of Appe EFileAndServe	Filing Description DJE Pet for Cust EFO DJE Petition for Review of Decision of Court of	Reference Number Filing 1/3 Filing 2/3	# C • •

Figure 13.4 – Filings Page

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

- 1. Click **Filings**.
- 2. Click Export

4.

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.

File name:	•
Figure 13.5 – Fi	le Name Field
Click Save	to save the filings to your computer, or click Cancel 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 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 (L) on the *Filings* page.

1 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.

EINOS BOOKMARKS	TEMPLATES SERVICE	CONTACTS			
ly Firm	▼ All Statuses	▼ All Locations ▼	From Date To Date	15 Case or Envelo	Filter Export
Case # 27-CV-12	2-113 - DJE Plaintiff	Biz Pro Se Civ Discrim vs DJ	E Sarah LastName (Hedlund, De	eborah)	
Draft # 4501 started March	09, 2012 at 12:37 PM by Devon E	stes on behalf of Mark Schwartz			
Status	Filing Code	Filing Type	Filing Description	Reference Number	
Draft	Memorandum and Affida	vit EFileAndServe	DJE Civ memo and Aff	filing 1/3	0
Draft	Motion for Review	EFileAndServe	Civ Mot for Rev	filing 2/3 EFS	0
Envelope # 4496 filed Mare	ch 09, 2012 at 12:30 PM by Devon	Estes on behalf of Mark Schwartz		,	
Envelope # 4496 filed Mare Status Accepted	ch 09, 2012 at 12:30 PM by Devon Filing Code Stipulation	Estes on behalf of Mark Schwartz Filing Type EFile	Filing Description Stipulation	Reference Number civil test file set up	
Envelope # 4496 filed Mare Status Accepted Case # 27-FA-12 Envelope # 4494 filed Mare	Ch 09, 2012 at 12:30 PM by Devon Filing Code Stipulation 2-25 - () Ch 09, 2012 at 12:04 PM by Devon	Estes on behalf of Mark Schwartz Filing Type EFile	Filing Description Stipulation	Reference Number civil test file set up	
Envelope # 4496 filed Man Status Accepted Case # 27-FA-12 Envelope # 4494 filed Man Status	ch 09, 2012 at 12:30 PM by Devon Filing Code Stipulation 2-25 () filing Code V Devon Filing Code	Estes on behalf of Mark Schwartz Filing Type EFile Estes on behalf of Beth Lewandowski Filing Type	Filing Description Stipulation	Reference Number civil test file set up Reference Number	
Envelope # 4496 filed Mare Status Accepted Case # 27-FA-12 Envelope # 4494 filed Mare Status Accepted	ch 09, 2012 at 12:30 PM by Devon Filing Code Stipulation 2-25 - () ch 09, 2012 at 12:04 PM by Devon Filing Code Petition for Custody	Estes on behalf of Mark Schwartz Filing Type EFile Estes on behalf of Beth Lewandowski Filing Type EFile	Filing Description Stipulation Filing Description DJE Pet for Cust EFO	Reference Number civil test file set up Reference Number Filing 1/3	
Envelope # 4496 filed Man Status Accepted Case # 27-FA-12 Envelope # 4494 filed Man Status Accepted Rejected	2012 at 12:30 PM by Devon Filing Code Stipulation 2-25 - () ch 09, 2012 at 12:04 PM by Devon Filing Code Petition for Custody Petition for Review of De	Estes on behalf of Mark Schwartz Filing Type EFile Estes on behalf of Beth Lewandowski Filing Type EFile EFile ecision of Court of Appe EFileAndServe	Filing Description Stipulation Filing Description DJE Pet for Cust EFO DJE Petition for Review of Decision of Court o	Reference Number civil test file set up Reference Number Filing 1/3 d. Filing 2/3	

Figure 13.6 – Filings Page

- 2. Click a case on the Filings page to copy.
- 3. Click I 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.

					· ·
	ah)	Sarah LastName (Hedlund, Deb	Civ Discrim vs DJE S	3 - DJE Plaintiff Biz Pro Se	e # 27-CV-12-113
			Lewandowski	2012 at 3:48 PM by Devon Estes on behalf of Bel	lope # 4645 filed March 21, 2
	ference Number	Filing Description	Filing Type	Filing Code	us
	S	Judg	EFileAndServe	Judgment	pted
	ference Number	Filing Description	k Schwartz Filing Type	2012 at 2:39 PM by Devon Estes on behalf of Ma Filing Code	lope # 4643 filed March 21, 2 us
		Filling Description	k Schwartz	2012 at 2:39 PM by Devon Estes on behalf of Ma	elope # 4643 filed March 21, 2
	= 1/1	Power of Atty	EFile	Affidavit and Order for Dismissal	epted
2ª C 🖿 🗾 🗖	ah) 🖸	Sarah LastName (Hedlund, Deb	Civ Discrim vs DJE S	3 - DJE Plaintiff Biz Pro Se 2012 at 11:43 AM by Devon Estes on behalf of M	e # 27-CV-12-113
	ference Number	Filing Description	Filing Type	Filing Code	us
	EFS	amended pet	EFileAndServe	Amended Petition	cted
	EFO	notice of withdrawal of counsel	EFile	Notice of Withdrawal of Counsel	cted
	ference Number EFS EFO	Filing Description amended pet notice of withdrawal of counsel	Filing Type EFileAndServe EFile	Filing Code Amended Petition Notice of Withdrawal of Counsel	us cted cted

Figure 13.7 – Filings Page

- 2. Locate your case on the *Filings* page.
- 3. Click 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.

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

🐻 Case Informatio	on
Location Date Filed Case Number Case Description Assigned to Judge Attorney	Hennepin Civil 27-CV-12-113 DJE Plaintiff Biz Pro Se Civ Discrim vs DJE Sarah LastName Hedlund, Deborah Mark Schwartz
Firm Name Filed By	Tyler Tyler TechTest
Fees	
Convenience Fee Total Court Case Fees Total Court Filing Fees Total Filing & Service Fee Grand Total	\$0.00 \$0.00 \$0.00 \$0.00 \$0.00
Pavment	
Account Name Transaction Amount Transaction Response Transaction ID Order ID	Waive Account \$0.00
Service Only	
Filing Type Filing Code Filing Description Reference Number Comments Courtesy Copies	Serve Service Only Civil Discrimination Henn DJE Civil Service Waiver no fees
Status	Draft
E	

Figure 13.8 – Envelope Details Window

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

1 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.

1 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.

000000000000000000000000000000000000000				
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				
Load Document	Pasia Color adf		[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.

ILINGS BOOKMARKS TE	MPLATES SERVICE CONTACTS				
Ay Firm 🔹	All Statuses All Location	ns From Da	te <m d="" yyyy=""> 15 To Date <m d="" yyyy=""> 1</m></m>	5 Case or Envelope	Filter Export
Case # 27-CV-12-113	3 - DJE Plaintiff Biz Pro Se Ci	v Discrim vs DJE Sar	ah LastName (Hedlund, Deb	oorah)	***
Draft # 4501 started March 09, 20	12 at 12:37 PM by Devon Estes on behalf of Mark S	chwartz			
Status	Filing Code	Filing Type	Filing Description	Reference Number	
Draft	Memorandum and Affidavit	EFileAndServe	DJE Civ memo and Aff	filing 1/3	0
Draft	Motion for Review	EFileAndServe	Civ Mot for Rev	filing 2/3 EFS	0
Envelope # 4496 filed March 09, 2 Status	012 at 12:30 PM by Devon Estes on behalf of Mark Filing Code	Schwartz Filing Type	Filing Description	Reference Number	
Status Accepted	Filing Code Stipulation	Filing Type EFile	Filing Description Stipulation	civil test file set up	
Case # 27-FA-12-25	- ()				# C - .
Envelope # 4494 filed March 09, 2	012 at 12:04 PM by Devon Estes on behalf of Beth	Lewandowski			
Status	Filing Code	Filing Type	Filing Description	Reference Number	
Accepted	Petition for Custody	EFile	DJE Pet for Cust EFO	Filing 1/3	
Rejected	Petition for Review of Decision of Court of Appe	EFileAndServe	DJE Petition for Review of Decision of Court of.	Filing 2/3	
		┥ ┥ 1 of 5	▶ ▶I		

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.

1 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.

Cannot Resume Envelope	
Envelope 187075 can not be resumed. Either it is not in Draft status or access is denied.	
Ok	

Figure 13.11 – Cannot Resume Envelope Message

3. Click **D** 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.

ILINGS BOOKMARKS	TEMPLATES SERVICE CONTACTS				
My Firm	All Statuses All Locatio	ns From Da	ate <m d="" yyyy=""> 15 To Date <m d="" yyyy=""> 1</m></m>	Case or Envelope	Filter Export
Case # 27-CV-12-1	113 - DJE Plaintiff Biz Pro Se Ci	v Discrim vs DJE Sar	ah LastName (Hedlund, Deb	oorah) 🖸	
Draft # 4501 started March 09,	, 2012 at 12:37 PM by Devon Estes on behalf of Mark S	chwartz			
Status	Filing Code	Filing Type	Filing Description	Reference Number	
Draft	Memorandum and Affidavit	EFileAndServe	DJE Civ memo and Aff	filing 1/3	0
Draft	Motion for Review	EFileAndServe	Civ Mot for Rev	filing 2/3 EFS	0
Envelope # 4496 filed March 0 Status	19, 2012 at 12:30 PM by Devon Estes on behalf of Mark Filing Code	Schwartz Filing Type	Filing Description	Reference Number	
Accepted	Stipulation	EFile	Stipulation	civil test file set up	L
Case # 27-FA-12-2	25 - ()				1 C 1 L
Envelope # 4494 filed March U	J9, 2012 at 12:04 PM by Devon Estes on behalf of Beth I Elling Code	Elling Tree	Filing Description	Deference Number	
Accepted	Petition for Custody	EFile	DJE Pet for Cust EFO	Filing 1/3	
Rejected	Petition for Review of Decision of Court of Appe	EFileAndServe	DJE Petition for Review of Decision of Court of.	Filing 2/3	
		┥ ┥ 1 of 5	▶ ▶I		

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 of for the selected case to cancel the filing.

14 Service Contacts

Topics Covered in this Chapter

- Adding Service Contacts to a Case
- Adding Service Contacts from a Master List
- Adding Service Contacts from a Public List
- Viewing Service Contacts History
- Viewing the Service Contact Details
- Viewing the Attached Case List
- Replacing Service Contacts on the Case
- Removing Service Contacts from a Master List
- Removing Service Contacts from a Public List
- Deactivating a Service Contact

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.

ILINGS BOOKMARKS	TEMPLATES SERVICE CONTACTS				
My Firm	All Statuses All Locat	ions From D	ate <m d="" yyyy=""> 15 To Date </m>	Case or Envelope	Filter Export
Case # 27-CV-12-	113 - DJE Plaintiff Biz Pro Se C	iv Discrim vs DJE Sa	rah LastName (Hedlund, Del	oorah) 🔛	2 C • L •
Draft # 4501 started March 0	9, 2012 at 12:37 PM by Devon Estes on behalf of Mark	Schwartz			
Status	Filing Code	Filing Type	Filing Description	Reference Number	
Draft	Memorandum and Affidavit	EFileAndServe	DJE Civ memo and Aff	filing 1/3	0
Draft	Motion for Review	EFileAndServe	Civ Mot for Rev	filing 2/3 EFS	0
Envelope # 4496 filed March Status	09, 2012 at 12:30 PM by Devon Estes on behalf of Mar Filing Code	k Schwartz Filing Type	Filing Description	Reference Number	
Status Accepted	Filing Code Stipulation	Filing Type EFile	Filing Description Stipulation	Reference Number	
Case # 27-FA-12-	25 - ()				28 C 🖿 🖬
Envelope # 4494 filed March	09, 2012 at 12:04 PM by Devon Estes on behalf of Bet	Lewandowski			
Status	Filing Code	Filing Type	Filing Description	Reference Number	
Accepted	Petition for Custody	EFile	DJE Pet for Cust EFO	Filing 1/3	
Rejected	Petition for Review of Decision of Court of App	EFileAndServe	DJE Petition for Review of Decision of Court of.	Filing 2/3	
		┥ ┥ 1 of 5	▶ ▶I		

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.

anage Case Service Contacts		
elect Contacts to Receive Se	rvice for each Party	
Defendent: adding test party part	t y	
Plaintiff: testing adding addtl par	ty	
▲ Other Service Contacts		
Jameson Aurther Westinghouse (ja	aw@rawitserlaw.com)	
Adam Record (aefstest6@gmail.co	m)	
Adam Smith (aefstest2@gmail.cor	n)	
New Service contact contact Testin	ng (TestingContact1@tylertech.com)	
s p (steven.pham@tylertech.com)		
tamasha Anderson (Anderson@tes	tingtw com)	
	val com)	
	N N	
Tim Thompson (werwer@test.com)	
Add New Add From Master List	Add From Public List Show History	
First Name*	Middle	Last Name*
Jameson	Aurther	Westinghouse
Email*	Administrative Copy (i)	Firm Name
jaw@rawitserlaw.com	kathy@rawitserlaw.com	Rawitser Law Firm
Address		City
7977 E. Frankford Way	Zin Codo	Mountain City
Alaska	112123	
Phone (i)		
(xxx)xxxx-xxxx		
Make this contact Public		
Save Contact in My Firm Master Service Li	st	

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.

DOORWAR					
/ Firm	All Statuses	All Locations	From Date <m d="" yyyy=""> 15 To Date <m <="" th=""><th>(d/yyyy> 15 Case or Envelope</th><th>Filter Export</th></m></m>	(d/yyyy> 15 Case or Envelope	Filter Export
Case # 27-CV-	12-113 - DJE Plaintiff B	iz Pro Se Civ Discrim vs DJ	E Sarah LastName (Hedlui	nd, Deborah)	X ≠ E ■ E ▶
Draft # 4501 started Ma	arch 09, 2012 at 12:37 PM by Devon Estes	on behalf of Mark Schwartz			
Status	Filing Code	Filing Type	Filing Description	Reference Number	
Draft	Memorandum and Affidavit	EFileAndServe	DJE Civ memo and Aff	filing 1/3	0
Draft	Motion for Review	EFileAndServe	Civ Mot for Rev	filing 2/3 EFS	0
Case # 27-CV-	12-113 - DJE Plaintiff B	iz Pro Se Civ Discrim vs DJI	E Sarah LastName (Hedlui	nd, Deborah)	24 C 🖿 🛃
Case # 27-CV- Envelope # 4496 filed N	12-113 - DJE Plaintiff B larch 09, 2012 at 12:30 PM by Devon Este	iz Pro Se Civ Discrim vs DJI es on behalf of Mark Schwartz	E Sarah LastName (Hedlui	nd, Deborah)	28 C 🖿 🖪
Case # 27-CV- Envelope # 4496 filed M Status Accepted	12-113 - DJE Plaintiff B larch 09, 2012 at 12:30 PM by Devon Este Filing Code Stipulation	iz Pro Se Civ Discrim vs DJI es on behalf of Mark Schwartz Filing Type EFilie	E Sarah LastName (Hedlun Filing Description Stipulation	nd, Deborah) Reference Number civil test file set up	¥ C = .
Case # 27-CV- Envelope # 4496 filed N Status Accepted	12-113 - DJE Plaintiff B Aarch 00, 2012 at 12:30 PM by Devon Esti Filing Code Stipulation	iz Pro Se Civ Discrim vs DJ es on behalf of Mark Schwartz Filing Type EFile	E Sarah LastName (Hediun Filing Description Stipulation	nd, Deborah) Reference Number civil test file set up	
Case # 27-CV- Envelope # 4496 filed h Status Accepted	12-113 - DJE Plaintiff B Aarch 09, 2012 at 12:30 PM by Devon Este Filing Code Stipulation 12-25 - ()	iz Pro Se Civ Discrim vs DJ es on behalf of Mark Schwartz Filing Type EFile	E Sarah LastName (Hedlun Filing Description Stipulation	nd, Deborah) Reference Number civil test file set up	2 C = 2
Case # 27-CV- Envelope # 4496 filed h Status Accepted Case # 27-FA- Envelope # 4494 filed h	12-113 - DJE Plaintiff B farch 09, 2012 at 12:30 PM by Devon Este Filing Code Stipulation 12-25 - () farch 09, 2012 at 12:04 PM by Devon Este	es on behalf of Mark Schwartz Filing Type EFile	E Sarah LastName (Hedlun Filing Description Stipulation	nd, Deborah) Reference Number civil test file set up	2 C C .
Case # 27-CV- Envelope # 4496 filed h Status Accepted Case # 27-FA- Envelope # 4494 filed h Status	12-113 - DJE Plaintiff B Aarch 00, 2012 at 12:30 PM by Devon Este Filing Code Stipulation 12-25 - () farch 00, 2012 at 12:04 PM by Devon Este Filing Code	iz Pro Se Civ Discrim vs DJ es on behalf of Mark Schwartz Filing Type EFile 25 on behalf of Beth Lewandowski Filing Type	E Sarah LastName (Hedlun Filing Description Stipulation	nd, Deborah) Reference Number civil test file set up Reference Number	2 C
Case # 27-CV- Envelope # 4496 filed h Status Accepted Case # 27-FA- Envelope # 4494 filed h Status Accepted	12-113 - DJE Plaintiff B Aarch 09, 2012 at 12:30 PM by Devon Est Filing Code Stipulation 12-25 - () farch 09, 2012 at 12:04 PM by Devon Este Filing Code Petition for Custody	iz Pro Se Civ Discrim vs DJ es on behalf of Mark Schwartz Filing Type EFile 25 on behalf of Beth Lewandowski Filing Type EFile	E Sarah LastName (Hediun Filing Description Stipulation Filing Description DJE Pet for Cust EFO	nd, Deborah) Reference Number civil test file set up Reference Number Filing 1/3	<u>* C • -</u>
Case # 27-CV- Envelope # 4496 filed h Status Accepted Case # 27-FA- Envelope # 4494 filed h Status Accepted Rejected	12-113 - DJE Plaintiff B farch 09, 2012 at 12:30 PM by Devon Este Filing Code Stipulation 12-25 - () farch 09, 2012 at 12:04 PM by Devon Este Filing Code Pettion for Custody Pettion for Review of Decisi	es on behalf of Mark Schwartz Filing Type EFile so n behalf of Beth Lewandowski Filing Type EFile on of Court of Appe EFileAndServe	E Sarah LastName (Hedlun Filing Description Stipulation Filing Description DJE Pet for Cust EFO DJE Petition for Review of Decision	nd, Deborah) Reference Number civil test file set up Reference Number Filing 1/3 of Court of. Filing 2/3	

Figure 14.3 – Filings Page

- 2. Locate the case to which you want to add the service contact.
- 3. Click 12 to view the service contact information.

The Manage Case Service Contacts page is displayed.

nage Case Service Contacts		
elect Contacts to Receive Se	rvice for each Party	
Defendent: adding test party part	y	-
Plaintiff: testing adding addtl part	ty	
Other Service Contacts		
Jameson Aurther Westinghouse (ja	w@rawitserlaw.com)	
Adam Record (aefstest6@gmail.co	m)	
Adam Smith (aefstest2@gmail.com	1)	
New Service contact contact Testin	g (TestingContact1@tylertech.com)	
s p (steven.pham@tylertech.com)		
tamasha Anderson (Anderson@tes	tingtw.com)	
Tamasha motor (tamashatest@om	ail.com)	
Tim Thompson (werwer@test.com))	
dd New Add From Master List	Add From Public List Show Histo	ry
First Name*	Middle	Last Name*
Jameson	Aurther	Westinghouse
Email*	Administrative Copy (i)	Firm Name
jaw@rawitserlaw.com	kathy@rawitserlaw.com	Rawitser Law Firm
Address		City
7977 E. Frankford Way	71- 0-4-	Mountain City
State	Zip Code	
Phone (i)	112125	
Make this contact Public		
Make this contact Public		

Figure 14.4 – Manage Case Service Contacts Page

4. Click Add From Master List

The Add Service Contact from Master List page is displayed.

Save Cancel

Firm Service Co	ntacto				
	macts		Case Service C	ontacts	
Name	Email		Name	Email	
Swinn Alberstein	swstein@ganesllp.com	C	Blu Ivy	Blulvy@Dynasty.org	d
Christian Dior	Dior@Christian.com	9	Denim Jeans	JDenim@tylertech.com	d Exp
Eloquint Intellect	EI@TT.com	9	August 14th sue	81412@august.com	d
					C
		Ado	d >		
		< Ren	nove		
34					
35					

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.

LINGS BOOKMARKS					
ly Firm	✓ All Statuses	✓ All Locations ✓	From Date <m d="" yyyy=""> 15 To Date <m <="" td=""><td>/d/yyyy></td><td>Filter Export</td></m></m>	/d/yyyy>	Filter Export
Case # 27-CV-12	2-113 - DJE Plaintiff	Biz Pro Se Civ Discrim vs DJ	E Sarah LastName (Hedlu	nd, Deborah)	
Draft # 4501 started March	09, 2012 at 12:37 PM by Devon Est	es on behalf of Mark Schwartz			
Status	Filing Code	Filing Type	Filing Description	Reference Number	
Draft	Memorandum and Affidavi	it EFileAndServe	DJE Civ memo and Aff	filing 1/3	0
Draft	Motion for Review	EFileAndServe	Civ Mot for Rev	filing 2/3 EFS	0
0		Die Bro Co City Die oning von D I			
Case # 27-CV-12 Envelope # 4496 filed Marc	-113 - DJE Plaintiff I h 09, 2012 at 12:30 PM by Devon Es	Biz Pro Se Civ Discrim vs DJ stes on behalf of Mark Schwartz	E Sarah LastName (Hedlu	nd, Deborah)	98 C 🖿 🛃
Case # 27-CV-12 Envelope # 4496 filed Marc Status Accepted	2-113 - DJE Plaintiff I th 09, 2012 at 12:30 PM by Devon Ex Filing Code Stipulation	Biz Pro Se Civ Discrim vs DJ stes on behalf of Mark Schwartz Filing Type EFile	E Sarah LastName (Hediun Filing Description Stipulation	nd, Deborah) Reference Number civil test file set up	₽ C = 2
Case # 27-CV-12 Envelope # 4496 filed Marc Status Accepted Case # 27-FA-12	2-113 - DJE Plaintiff I th 09, 2012 at 12:30 PM by Devon El Filing Code Stipulation -25 - ()	Biz Pro Se Civ Discrim vs DJ stes on behalf of Mark Schwartz Filmg Type EFile	E Sarah LastName (Hediun Filing Description Stipulation	nd, Deborah) Reference Number civil test file set up	* • • •
Case # 27-CV-12 Envelope # 4496 filed Marc Status Accepted Case # 27-FA-12 Envelope # 4494 filed Marc	P-113 - DJE Plaintiff I th 09, 2012 at 12:30 PM by Devon Er Filing Code Stipulation	Biz Pro Se Civ Discrim vs DJ stes on behalf of Mark Schwartz Filing Type EFile stes on behalf of Beth Lewandowski	E Sarah LastName (Hediun Filing Description Stipulation	nd, Deborah) Reference Number civil test file set up	<u> </u>
Case # 27-CV-12 Envelope # 4496 filed Marc Status Accepted Case # 27-FA-12 Envelope # 4494 filed Marc Status	2-113 - DJE Plaintiff I th 09, 2012 at 12:30 PM by Devon E: Filing Code Stipulation -25 - () h 09, 2012 at 12:04 PM by Devon E: Filing Code	Biz Pro Se Civ Discrim vs DJ stes on behalf of Mark Schwartz Filing Type EFile stes on behalf of Beth Lewandowski Filing Type	E Sarah LastName (Hedlun Filing Description Stipulation	nd, Deborah) Reference Number civil lest file set up Reference Number	****
Case # 27-CV-12 Envelope # 4496 filed Marc Status Accepted Case # 27-FA-12 Envelope # 4494 filed Marc Status Accepted	2-113 - DJE Plaintiff I th 09, 2012 at 12:30 PM by Devon E Filing Code Stipulation -25 - () th 09, 2012 at 12:04 PM by Devon E Filing Code Petition for Custody	Biz Pro Se Civ Discrim vs DJ stes on behalf of Mark Schwartz Filing Type EFile stes on behalf of Beth Lewandowski Filing Type EFile	E Sarah LastName (Hedium Filing Description Stipulation Filing Description DJE Pet for Cust EFO	nd, Deborah) Reference Number civil lest file set up Reference Number Filting 1/3	#C .
Case # 27-CV-12 Erwelope # 4496 filed Marc Status Accepted Case # 27-FA-12 Erwelope # 4494 filed Marc Status Accepted Rejected	P-113 - DJE Plaintiff I th 09, 2012 at 12:30 PM by Devon E Filing Code Stipulation Stipulation -25 - () th 09, 2012 at 12:04 PM by Devon E Filing Code Petition for Custody Petition for Review of Deci	Biz Pro Se Civ Discrim vs DJ stes on behalf of Mark Schwartz Filing Type EFile stes on behalf of Beth Lewandowski Filing Type EFile sion of Court of Appe EFileAndServe	E Sarah LastName (Hedlun Filing Description Stipulation Filing Description DJE Pet for Cust EFO DJE Petition for Review of Decision	nd, Deborah) Reference Number civil test file set up Reference Number Filing 1/3 of Court of. Filing 2/3	# C .

Figure 14.6 – Filings Page

- 2. Locate the case to which you want to add the service contact.
- 3. Click **1** to view the service contact information.

The Manage Case Service Contacts page is displayed.
Defendent: adding test part	y part	1	
Plaintiff: testing adding add	iti part	у	
4 Other Service Contacts			
Jameson Aurther Westingho	use (ja	w@rawitserlaw.com)	
Adam Record (aefstest6@gr	nail.cor	n)	
Adam Smith (aefstest2@gm	ail.com)	C 🗏 🗹 🗙
New Service contact contact	Testin	g (TestingContact1@tylertech.com)	
s p (steven.pham@tylertech	.com)		
tamasha Anderson (Anderso	n@test	ingtw.com)	
Tamasha motor (tamashate	st@am	ail.com)	
Tim Thompson (werwer@te	st com)		
In nonpson (nerver@cc	sc.com		
dd New Add From Master List	/	Add From Public List Show Histo	tory
First Name*		Middle	Last Name*
Jameson		Aurther	Westinghouse
Email*		Administrative Copy 🥡	Firm Name
jaw@rawitserlaw.com		kathy@rawitserlaw.com	Rawitser Law Firm
Address			City Mountain City
State		Zin Code	Houndain City
Alaska	•	112123	
Phone (i)			
(xxx)xxx-xxxx			
Make this contact Public			
Thanke this contact i done			

Figure 14.7 – Manage Case Service Contacts Page

4. Click Add From Public List

The Add Service Contact from Public List window is displayed.

First Namo	Lact N	2000		Em	ail		Firm			~
		ame			an				Search	Clear
Search Result	S			_		Case Serv	vice Co	ontacts		
Name	Email	Firm				Name		Email	Firm	
aa	steven.pham@tylertec .com	hTyler Tech System August	C,	^		kathy D		kdonovan@courts.mi.go v	Tyler Tech System August	d
Rob Adkins	robert.adkins@tylertec .com	h Robert Adkins	C			Denise D		ddevine@courts.mi.gov	Tyler Tech System August	C
Swinn Alberstein	swstein@ganesllp.com	Tyler Tech System August	d		Add >	b b		b@mail.com	Tyler Tech System August	d
Contact August	Contact@august.com	Aust 14	q			new 1		new1@email.com	Tyler Tech System	q
Master 1 August 14th	August14th@hotmail.c om	Aust 14	d		< Remove				, luguot	_
b b	b@mail.com	Tyler Tech System August	G							
cc	c@mail.com	Tyler Tech System August	G							
		Tulor Tech System		•						

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.

LINGS BOOKMARK	S TEMPLATES SEF	VICE CONTACTS				
y Firm	All Statuses	✓ All Location	ns	From Date <m d="" yyyy=""> 15</m>	To Date	Case or Envelope Filter Export
Case # 27-CV-	12-113 - DJE Plai	ntiff Biz Pro Se Ci	v Discrim vs	DJE Sarah LastName	e (Hedlund, Deborah)	★ # @ ■ ₽ ▶
Draft # 4501 started Mar	rch 09, 2012 at 12:37 PM by D	evon Estes on behalf of Mark S	chwartz			
Status	Filing Code		Filing Type	Filing Description	Reference	lumber
Draft	Memorandum ar	d Affidavit	EFileAndServe	DJE Civ memo and A	Aff filing 1/3	0
Draft	Motion for Revie	N	EFileAndServe	Civ Mot for Rev	filing 2/3 EF	5 🔕
Envelope # 4496 filed M Status	arch 09, 2012 at 12:30 PM by Filing Code	Devon Estes on behalf of Mark	Schwartz Filing Type	Filing Description	Reference 1	la 🖾 🖬
Envelope # 4496 filed M Status	arch 09, 2012 at 12:30 PM by Filing Code	Devon Estes on behalf of Mark	Schwartz Filing Type	Filing Description	Reference	lumber
Accepted	Stipulation		EFile	Stipulation	civil test file	set up
Case # 27-FA-1	12-25 - ()	Deven Feter on helpath of Beth	avandowski			1 I I I I I I I I I I I I I I I I I I I
Envelope # 4494 filed M	arch 09, 2012 at 12:04 PM by	Devon Estes on Denair of Beth	Filing Type	Filing Description	Reference	lumber
Status	Filing Code			. Ing Description	Reference	
Status Accepted	Filing Code Petition for Custo	dy	EFile	DJE Pet for Cust EF	O Filing 1/3	

Figure 14.9 – Filings Page

- 2. Locate the case for which you want to view a service contact's history.
- 3. Click **1** to view the service contact information.

The Manage Case Service Contacts page is displayed.

anage Case Service Contacts		
elect Contacts to Receive Se	ervice for each Party	
Defendent: adding test party par	ty	•
Plaintiff: testing adding addtl par	ty	
Other Service Contacts		
Jameson Aurther Westinghouse (j	aw@rawitserlaw.com)	
Adam Record (aefstest6@gmail.co	m)	
Adam Smith (aefstest2@gmail.cor	n)	
New Service contact contact Testi	ng (TestingContact1@tylertech.com)	
s p (steven.pham@tylertech.com)		
tamasha Anderson (Anderson@te	stingtw.com)	
Tamasha motor (tamashatest@on	aail com)	
Tim Thompson (werver@test.com	A A A A A A A A A A A A A A A A A A A	
This monpson (werwer@rest.com	<i>,</i>	
Add New Add From Master List	Add From Public List Show History	
First Name*	Middle	Last Name*
Jameson	Aurther	Westinghouse
Email*	Administrative Copy 🥫	Firm Name
jaw@rawitserlaw.com	kathy@rawitserlaw.com	Rawitser Law Firm
Address		City Mountain City
State	Zin Code	
Alaska	112123	
Phone (i)		
(xxx)xxx-xxxx		
✓ Make this contact Public		
Save Contact in My Firm Master Service Li	st	
		Save Cancel

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.

ct a Party to add Service Contacts		
Name	Action	Time
New Service contact contact Testi	Attach	8/10/2012 3:09 PM
Adam Record	Attach	8/10/2012 3:13 PM
Tamasha motor	Attach	8/10/2012 3:13 PM
tamasha Anderson	Attach	8/10/2012 3:13 PM
sp	Attach	8/13/2012 10:26 AM
Adam Smith	Attach	8/13/2012 10:26 AM
Tim Thompson	Attach	8/13/2012 10:26 AM
Jameson Aurther Westinghouse	Attach	8/15/2012 5:17 PM
		Clos
	0.1	Clos

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.

Name		Email	
lark Schwartz		mark.schwartz@tylertech.com	
lark Twedt		mark.twedt@tylertech.com	
laite Cervera		maite.cervera@tylertech.com	
lark DD Twedt		marktwedt@msn.com	
lavid Lomas		david.lomas@tylertech.com	
lave Lomas		david_lomas1@hotmail.com	
like Smith		mark_schwartz@hotmail.com	
Email*	Firm Name		
	Tyler		
a didaaaa		City	
Address			
State	Zip Code		
Address State	Zip Code		
Address State Phone	Zip Code		
Address State Phone	zip Code		

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.

FILINGS BOOKMARKS TEMPLATES R	EV Service Contact Details: Jameson	Aurther Westinghouse	
Name Denim Jeans Tamasha motor Adam Record Adam Smith August 14th sue Tim Thompson Jameson Aurther Westinghouse	Jameson Aurther Westinghouse Rawitser Law Firm 7977 E. Frankford Vay, Mountain City, J Jaw@rawitserlaw.com	AK 22323 Close	
First Name* Mi Jameson A Email* Ac	Iddle Wither dministrative Copy @ athw@rawiteadaw.com	Last Name* Westinghouse Firm Name	
Address		City	

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.

lame		Email			
mon C James		sc1@tt.com		C = 🤈 🗙	
ervice Contact 3		sc3@tt.com			
anvice Contact 4		sc4@tt.com			
		Scherticom			
K Public Contact Test		skpublic@tylerte	ech.com		
dd New					
First Name*	Middle		Last Name*		
Simon	С		James		
Email*	Administrative C	ору 🕕	Firm Name		
sc1@tt.com	john@tt.com		Law Firm and Associates		
Country*					
United States of America	•				
Address Line 1*					
68900 Interiror Pkwy					
City*					
Catalina					
State*	Zip Code*				
Oregon	▼ 52324				
700 700 2228					
/23-/00-2320					
🗹 Make this contact Public 😰					

Figure 14.14 – Service Contacts Page

2. Click 🔲 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.

Name		Email	
Aark Schwartz		mark.schwartz@tylertech.com	E = 0 × -
Mark Twedt		mark.twedt@tylertech.com	EBOX
Maite Cervera		maite.cervera@tylertech.com	EBOX
Mark DD Twedt		marktwedt@msn.com	EBOX
David Lomas		david.lomas@tylertech.com	EBOX
Dave Lomas		david_lomas1@hotmail.com	EBOX
Mike Smith		mark_schwartz@hotmail.com	
First Name*	Middle	Last Name*	
First Name*	Middle	Last Name*	
First Name*	Middle Firm Name	Last Name*	
First Name* Email*	Middle Firm Name Tyler	Last Name*	
First Name* Email* Address	Middle Firm Name Tyler	City	
First Name* Email* Address State	Middle Firm Name Tyler Zip Code	City	
First Name* Email* Address State	Middle Firm Name Tyler Zip Code	City	
First Name* Email* Address State Phone	Middle Firm Name Tyler Zip Code	City	

Figure 14.15 – Service Contacts Page

2. Click for the specified service contact.

The Replace Service Contact window is displayed.

Replace Service Contact: Polly Doe			23
Replace with new contact O Replace	with existing contact		
First Name*	Middle	Last Name*	
Email*	Administrative Copy (j)	Firm Name	
Country			
Address Line 1			
Address Line 2			
City			
Region	Zip Code		
Phone			
Make this contact Public			
			Save Contact

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

Replace Service Contact: Po	olly Doe		2
Replace with new contact	 Replace with existing contact 		
Select existing contact*			
· · ·			
Anthony Doe			
Henry Doe			
Hilary Doe			
Melinda Doe			
Priscilla Doe			
Raymond Doe			
Robert Doe			
William Doe			
			Save Contact
Finner 44.47 Demler		Only of a station of the state of Days of	N

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

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

1 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.

Boottinatio	TEMPLATES SERVICE CONTACTS				
/ly Firm	All Statuses	All Locations 👻	From Date M/d/yyyy> 15 To Date	YYYY> 15 Case or Envelope	Filter Expo
Case # 27-CV-12-	113 - DJE Plaintiff Biz Pro	Se Civ Discrim vs DJ	E Sarah LastName (Hedlund	l, Deborah)	★ # @ ■ ₽ ▶
Draft # 4501 started March 0	9, 2012 at 12:37 PM by Devon Estes on behalf	of Mark Schwartz			
Status	Filing Code	Filing Type	Filing Description	Reference Number	
Draft	Memorandum and Affidavit	EFileAndServe	DJE Civ memo and Aff	filing 1/3	0
Draft	Motion for Review	EFileAndServe	Civ Mot for Rev	filing 2/3 EFS	0
Case # 27-CV-12-	113 - DJE Plaintiff Biz Pro	Se Civ Discrim vs DJ	E Sarah LastName (Hedlund	I, Deborah)	28 🖸 🖿 🖬
Envelope # 4496 filed March Status	09, 2012 at 12:30 PM by Devon Estes on beha Filing Code	If of Mark Schwartz Filing Type	Filing Description	Reference Number	
Envelope # 4496 filed March Status Accepted	09, 2012 at 12:30 PM by Devon Estes on beha Filing Code Stipulation	If of Mark Schwartz Filing Type EFile	Filing Description Stipulation	Reference Number civil test file set up	
Envelope # 4496 filed March Status Accepted Case # 27-FA-12-	09, 2012 at 12:30 PM by Devon Estes on beha Filing Code Stipulation 25 - () 20, 2012 at 12:04 PM by Devan Ester as beha	If of Mark Schwartz Filing Type EFile	Filing Description Stipulation	Reference Number civil test file set up	#C .
Envelope # 4496 filed March Status Accepted Case # 27-FA-12- Envelope # 4494 filed March	09, 2012 at 12:30 PM by Devon Estes on beha Filing Code Stipulation 25 - () 09, 2012 at 12:04 PM by Devon Estes on beha Filing Code	ilf of Mark Schwartz Filing Type EFile Ilf of Beth Lewandowski Filion Type	Filing Description Stipulation	Reference Number civil test file set up	3 C 1 .
Envelope # 4496 filed March Status Accepted Case # 27-FA-12- Envelope # 4494 filed March Status Accepted	09, 2012 at 12:30 PM by Devon Estes on beha Filing Code Stipulation 25 - () 09, 2012 at 12:04 PM by Devon Estes on beha Filing Code Petition for Custody	If of Mark Schwartz Filing Type EFile If of Beth Lewandowski Filing Type EFile	Filing Description Stipulation Filing Description DJE Pet for Cust EFO	Reference Number civil test file set up Reference Number Filing 1/3	# G = .
Erwelope # 4496 filed March Status Accepted Case # 27-FA-12 Erwelope # 4494 filed March Status Accepted Rejected	09, 2012 at 12:30 PM by Devon Estes on beha Filing Code Stipulation 25 - () 09, 2012 at 12:04 PM by Devon Estes on beha Filing Code Petition for Custody Petition for Review of Decision of Cour	If of Mark Schwartz Filing Type EFile alf of Beth Lewandowski Filing Type EFile t of Appe EFileAndServe	Filing Description Stipulation Filing Description DJE Pet for Cust EFO DJE Petition for Review of Decision of	Reference Number civil test file set up Reference Number Filing 1/3 Court of. Filing 2/3	\$ C • •

Figure 14.18 – Filings Page

- 2. Locate the case from which you want to remove the service contact.
- 3. Click **1** to view the service contact information.

The Manage Case Service Contacts page is displayed.

Derendent: adding test party	party	
Plaintiff: testing adding addt	party	
Other Service Contacts		
Jameson Aurther Westinghous	e (jaw@rawitserlaw.com)	
Adam Record (aefstest6@gma		
Adam Smith (aefstest2@gmai	l.com)	
New Service contact contact T	esting (TestingContact1@tylertech.com)	G 🗉 🗹 🗙
s p (steven.pham@tylertech.c	om)	C 🗉 🗹 🗙
tamasha Anderson (Anderson	@testingtw.com)	
Tamasha motor (tamashatest		
Tim Thompson (werwer@test.	com)	
d New Add From Master List	Add From Public List Show His	story
irst Name*	Middle	Last Name*
Jameson	Aurther	Westinghouse
mail*	Administrative Copy (i)	Firm Name
jaw@rawitserlaw.com	kathy@rawitserlaw.com	Rawitser Law Firm
aaress 7977 E. Frankford Way		Mountain City
tate	Zip Code	Piountain city
Naska	 112123 	
hone (i)		
(xxx)xxx-xxxx		
Make this contact Public		

Figure 14.19 – Manage Case Service Contacts Page

4. Click Add From Master List

The Add Service Contact from Master List page is displayed.

Add Service Contact fr	om Master List				23
Firm Service Co	ntacts		Case Service Co	ontacts	120
Name	Email		Name	Email	
Swinn Alberstein	swstein@ganesllp.com	q	Blu Ivy	Blulvy@Dynasty.org	q
Christian Dior	Dior@Christian.com	G	Denim Jeans	JDenim@tylertech.com	d Exp
Eloquint Intellect	El@TT.com	G	August 14th sue	81412@august.com	q
10			_		
635		Add >			
		< Remo	ve		
635					
					Save

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.

BOOKMARKS	TEMPLATES SERVICE CONTACTS				
y Firm	All Statuses	All Locations	From Date From Date To Date	y> 15 Case or Envelo	pe Filter Expo
Case # 27-CV-12-	-113 - DJE Plaintiff Biz Pro	Se Civ Discrim vs DJ	E Sarah LastName (Hedlund, I	Deborah)	× # E = E >
Draft # 4501 started March 0	9, 2012 at 12:37 PM by Devon Estes on behalf	of Mark Schwartz			
Status	Filing Code	Filing Type	Filing Description	Reference Number	
Draft	Memorandum and Affidavit	EFileAndServe	DJE Civ memo and Aff	filing 1/3	0
Draft	Motion for Review	EFileAndServe	Civ Mot for Rev	filing 2/3 EFS	0
Envelope # 4496 filed March Status	-113 - DJE Plaintiff Biz Pro 09, 2012 at 12:30 PM by Devon Estes on beha Filing Code	If of Mark Schwartz Filing Type	E SARAN LASTNAME (HEDIUND, I	Reference Number	28 🖸 🖿 🛃
Accepted	Stipulation	EFile	Stipulation	civil test file set up	
Case # 27-FA-12-	25 - ()	K = C D= the L = summed as sum les			2ª 🖸 🖿 🛃
Case # 27-FA-12- Envelope # 4494 filed March	25 - () 109, 2012 at 12:04 PM by Devon Estes on beha	If of Beth Lewandowski	Filing Description	Deference Number	28 🖸 🖿 🛃
Case # 27-FA-12- Envelope # 4494 filed March Status Accepted	25 - () 109, 2012 at 12:04 PM by Devon Estes on beha Filing Code Petition for Custody	lf of Beth Lewandowski Filing Type EFile	Filing Description DJE Pet for Cust EFO	Reference Number Filing 1/3	32 C 🖿 🗖

Figure 14.21 – Filings Page

- 2. Locate the case from which you want to remove the service contact.
- 3. Click **1** to view the service contact information.

The Manage Case Service Contacts page is displayed.

Manage Case Service Contacts						
Select Contacts to Receive Ser	vice for each Party					
Defendent: adding test party party	Defendent: adding test party party					
Plaintiff: testing adding addtl part	y					
▲ Other Service Contacts						
Jameson Aurther Westinghouse (ja						
Adam Record (aefstest6@gmail.com						
Adam Smith (aefstest2@gmail.com)					
New Service contact contact Testin	g (TestingContact1@tylertech.com)					
s p (steven.pham@tylertech.com)						
tamasha Anderson (Anderson@test	ingtw.com)					
Tamasha motor (tamashatest@gma						
Tim Thompson (werver@test.com)						
This monipson (werwer@test.com)						
Add New Add From Master List A	Add From Public List Show Histor	У				
First Name*	Middle	Last Name*				
Jameson	Aurther	Westinghouse				
Email*	Administrative Copy (i)	Firm Name				
jaw@rawitserlaw.com	Rawitser Law Firm					
Address	City					
7977 E. Frankford Way	Zin Codo	Mountain City				
	112123					
Phone (i)						
(xxx)xxx(xxx)						
Make this contact Public						

✓ Save Contact in My Firm Master Service List

Figure 14.22 – Manage Case Service Contacts Page

4. Click Add From Public List

The Add Service Contact from Public List page is displayed.

Save Cancel

First Name	Last N	3000		Emai			Firm			
		ane			•				Search	Clear
Search Result	S					Case Servi	ce Contacts			
Name	Email	Firm				Name	Email	Firr	n	
aa	steven.pham@tylertec .com	hTyler Tech System August	d	^		kathy D	kdonovan@co v	urts.mi.go Tyle Aug	er Tech System just	q
Rob Adkins	robert.adkins@tylertec .com	h Robert Adkins	d			Denise D	ddevine@cour	ts.mi.gov Tyle Aug	er Tech System just	q
Swinn Alberstein	swstein@ganesllp.com	Tyler Tech System August	d		Add >	b b	b@mail.com	Tyle Aug	er Tech System just	q
Contact August	Contact@august.com	Aust 14	C,			new 1	new1@email.c	com Tyle	er Tech System	q
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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.

Simon C James sc1@tt.com Service Contact 3 Service Contact 4 SK Public Contact Test SK Pub	me	E	Email				
Service Contact 3 Service Contact 4 SK Public Contact Test Add New First Name* Middle Last Name* Simon C James Email* Administrative Copy (i) Firm Name sci@tt.com john@tt.com Law Firm and Associates Country* United States of America Address Line 1* 68900 Interior Pkwy City* Catalina State* Zip Code* Oregon 729-700-2328 Zip Code* Country Sume City States of America Zip Code* State State States State	n C James	s	sc1@tt.com	@tt.com			
Service Contact 4 SK Public Contact Test Sk Public C	ice Contact 3	sc3@tt.com		@tt.com		E E O X	
sk Public Contact Test kpublic@tylertech.com Add New First Name* Middle Last Name* Simon C James Email* Administrative Copy (a) Firm Name Sc1@tt.com John@tt.com Law Firm and Associates Country* United States of America Address Line 1* 68900 Interior Pkwy City* Catalina State* Zip Code* Oregon Size4 Done 729-700-2328 Zime Phone Phon	ice Contact 4	s	c4@tt.com				
Add New First Name* Middle Last Name* Simon C James Email* Administrative Copy () Firm Name Stl@t.com John@tt.com Law Firm and Associates Country* United States of America Address Line 1* 68900 Interior Pkwy Citly* Catalina State* Zip Code* Dregon State* Zip Code* State	ublic Contact Tact		-	m			
Add New First Name* Middle Last Name* Simon C James Email* Administrative Copy Firm Name Scl@tt.com John@tt.com Law Firm and Associates County* United States of America Address Line 1* 68900 Interior Pkwy City* Catalina State* Zip Code* S2324 Phone 729-700-2328	ubic contact resc	3	кривноетупентесньо				
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First Name* Middle Last Name* Simon C James Email* Administrative Copy () Firm Name sc1@tt.com john@tt.com Law Firm and Associates Country* United States of America Address Line 1* 68900 Interior Pkwy Catalina Zip Code* State* Zip Code* Oregon 52324 Phone 729-700-2328							
Simon C James Email* Administrative Copy () Firm Name scl@tt.com john@tt.com Law Firm and Associates Country* United States of America Address Line 1* 68900 Interior Pkwy City* Catalina State* Oregon 729-700-2328	st Name*	Middle		Last Name*			
Email* Administrative Copy (i) Firm Name sc1@tt.com John@tt.com Law Firm and Associates Country* United States of America V Address Line 1* 68900 Interior Pkwy City* Catalina State* Oregon S224 Phone T29-700-2328 V	imon	С		James			
sc1@tt.com john@tt.com Country* United States of America Address Line 1* 68900 Interior Pkwy City* Catalina State* Oregon 729-700-2328	nail*	Administrative Copy (i)		Firm Name			
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Figure 14.24 – Service Contacts Page

2. Click \square 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.