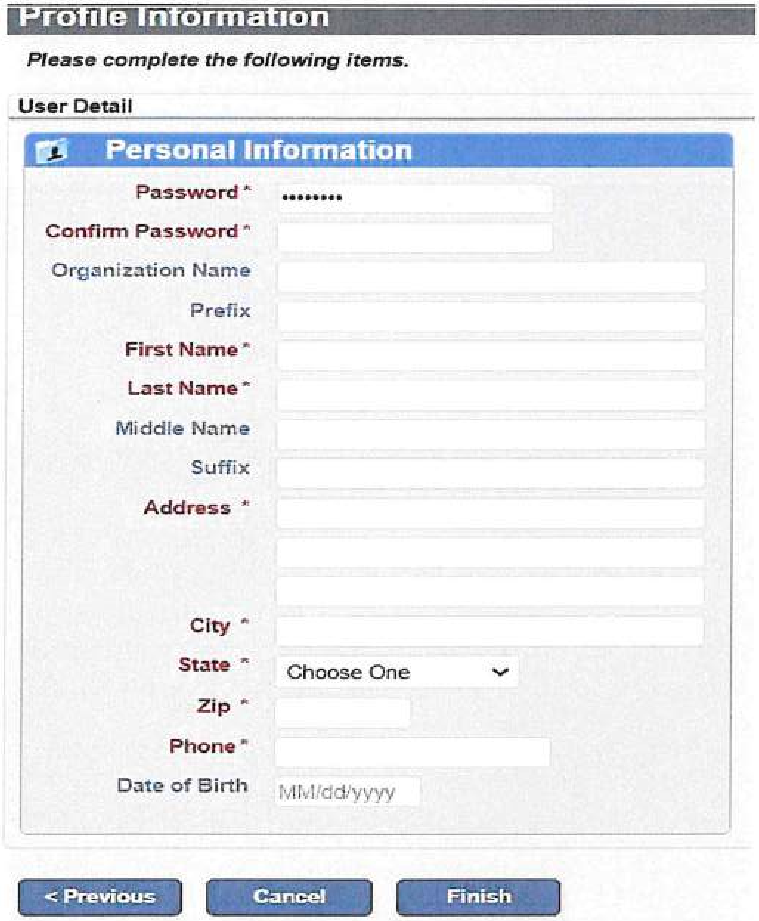
eFiler Instructions

Contents

Requesting access for eFiling

1. Navigate to the court's webpage ______________________
2. Click Registration Link For eFiling (Left Column) of screen.
3. Enter Captcha Code and Click "NEXT" (if required)
4. Enter Attorney Bar code (if registering as an attorney)
4. Enter email address to be registered and click" **NEXT**."
5. Fill out Personal Information for registration (all fields in RED are required)
6. Click Finish

__Note__: If have issues registering with the bar code or any other issues please contact the clerk's office for assistance.



7. An email will be sent out to the email that was used for registration with a confirmation message.
8. Click the "CLICK HERE" link to confirm your email.

THE COURT WILL NOT BE ABLE TO APPROVE YOU UNTIL THIS IS COMPLETED.

9. Once Confirm your email, depending on how the court is configured, the court will allow automatic approval to login, or the court will need to approve the user before being accepted.
10. Once the court accepts you for eFiling, you will receive an email confirming registration.

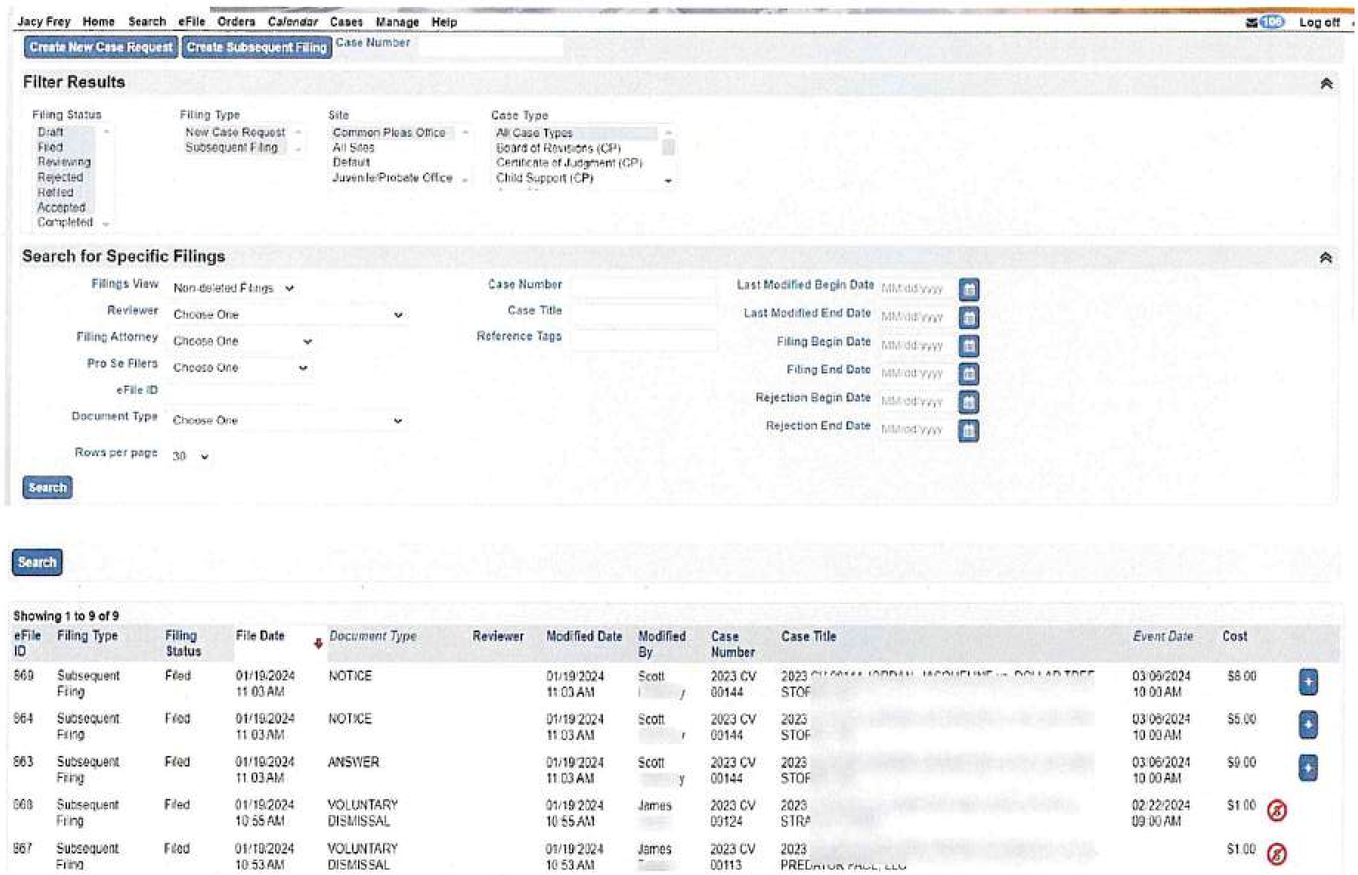
Logging into Court Efiling

1. Navigate to the court's webpage ______________________________
2. Click on the 'Log on' option or click the eFile Tab.

3. Enter Username (your email address)
4. Enter Password
   Note: If forgot your password, Click "Forgot Password" and follow instructions on the screen
5. Click on the 'eFile' option.
   This will take you to your 'My Filings' queue.

The 'My Filings' queue allows you to:

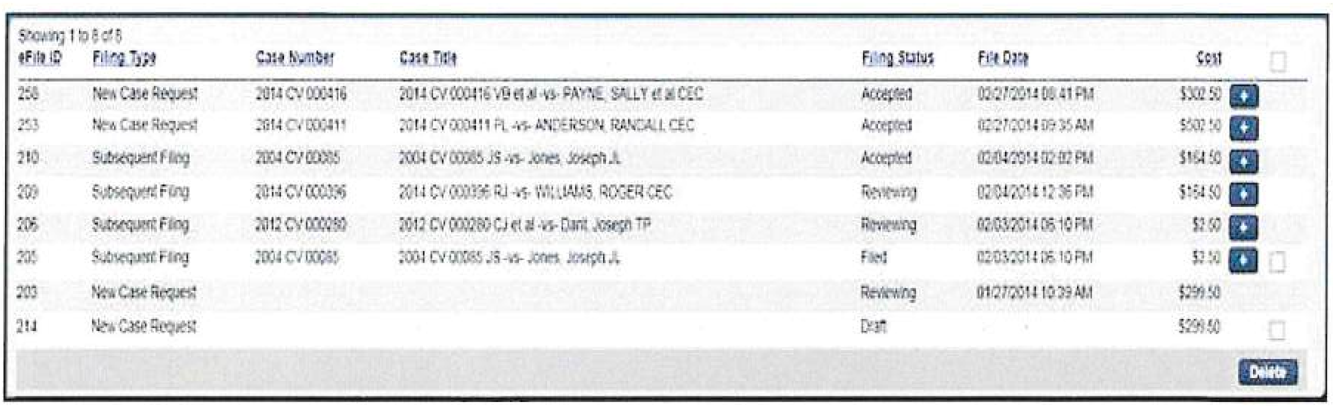
- Submit new cases.
- Submit subsequent filings on existing cases.
- Save partially completed work to submit at a later time.
- Monitor the status of eFiled records / pleadings.
- Make corrections on eFilings that have been 'rejected' by the Court.
- View Cases that you have eFiled



The top section, of the 'My Filings' queue, provides search options to control which records will display in the search results at the bottom of the screen.

1. Enter the desired search criteria.
2. Click the 'Search' button.

The bottom section of the screen displays the records that fall within the search criteria selected.



Efile Statuses:

1. Draft – Filing has been created, not yet submitted by the Filer.

2. **Filed / Submitted** – Filing has been submitted and is waiting for review by Court Reviewer
   - The date and time submitted will become the electronic 'Time Stamp' date and time once, or if, the Filing is 'Accepted' by the Reviewer.
   - The Filer can continue to modify a Filing in this status; however, doing so will change the filing date/time (time stamp date) of the Filing to the new date/time that the Filing was resubmitted.

3. **Reviewing** – Filing is being reviewed by the Reviewer and the Filing can no longer be modified by the Filer unless rejected by the Reviewer.

4. **Rejected** – the Reviewer has rejected the Filing, and it is returned to the 'My Filings' queue.
   - Filings that have been rejected and resubmitted will be time-stamped with the original filed/submitted date/time if, or once, accepted by the Reviewer.

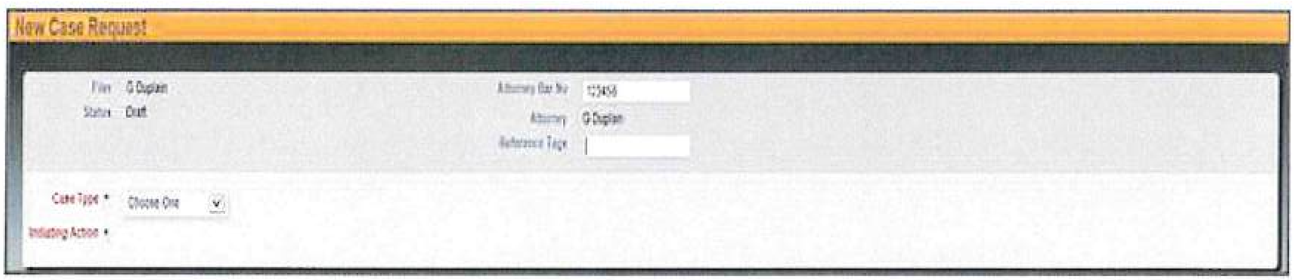
5. **Refiled** – a previously rejected Filing has been modified by the Filer and has been resubmitted/refiled and is waiting for review by the Reviewer.

6. **Accepted** – the Filing has been accepted by Reviewer.
   - Filings are now electronically 'time stamped' with the date submitted (or resubmitted
   - The Payment process is completed.
   - Filings are processed in CourtView.

7. **Completed** – Filing has been completed, and the case or filing has been successfully updated in CourtView.

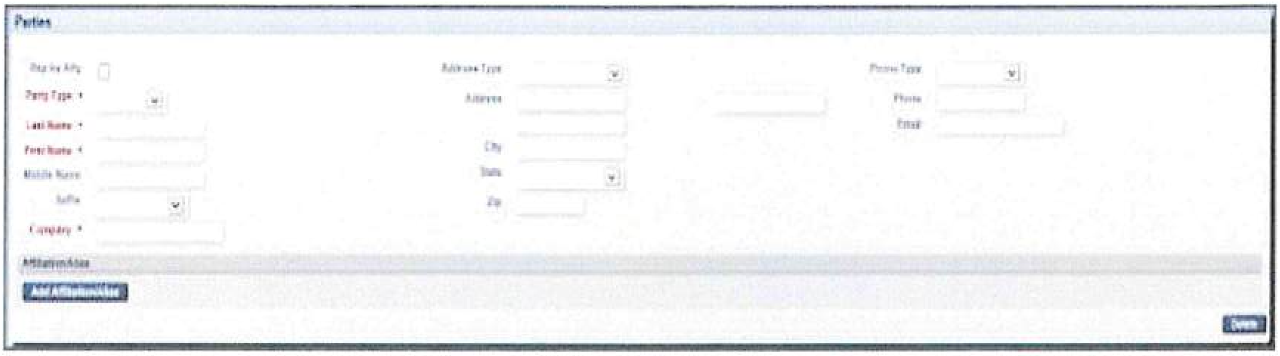
Filing a new case for eFiling

1. From the 'My Filings' queue
2. Click on the 'Create New Case Request' button (top of screen)
   - This will take you to the New Case Request screen



NOTE: **Fields in red denote required information.**

3. Update the Attorney Bar No. field, if desired.
   - Attorney Bar No defaults to the bar number of the eUser logged in but can be changed to any valid bar no that is *registered* as an eUser and exists in CourtView.
4. Enter a Reference Tag that can be used for personal reference, if desired
   - The 'Reference Tags' field is a free formed text field to help the filer identify the case such as an internal case or tracking number.
5. Select the **Case Type** from the drop-down list.
6. Select the **Initiating Action** from the drop-down list (if there is only one option will default)



Adding a Party Name

1. Click the <u>'Rep by Atty'</u> field for the parties the attorney is representing.
2. Select the <u>'Party' type</u> using the drop-down list.
3. <u>Enter the name</u> of the party using either:
   - Last, First, Middle Name fields (Suffix field, if applicable)

   -or-

   - Company field
4. Click the <u>"On Behalf of"</u> box if filing on behalf of this party. (will be required if there is money involved in filing)

Adding Address Information

1. Select the <u>Address Type</u> using the drop-down list (ONLY if an address will be entered)
2. Enter <u>Address information</u> (required by court)
   - Address information may be required by the Court Local Rules even though it is not required in the filing process.
   - The Address Type field becomes a required field if the address fields are populated.
   - There are 3 address lines in addition to the City, State, Zip fields.
   - Entering the Zip code will populate City and State
   - The zip code entered MUST be a valid zip code within CourtView.
   - A four-digit extension for Zip code can be entered ONLY if valid within CourtView.

Adding Phone Information

1. Select the <u>Phone Type</u> (ONLY if a phone number will be entered)
2. Enter <u>Phone No</u> (if desired or required by the Court)
3. <u>Enter email</u> (if desired or required by the Court) or if want the party to be emailed regarding filings.

Adding Alias Information

1. If the party has an alias, DBA or other affiliation, Click the <u>'Add Affiliation/Alias' button</u>.
   - Select the down arrow on the 'Affiliation' field.
   - Select the appropriate affiliation or **<u>alias type.</u>**
   - Enter Last Name, First Name

   -or-

   - Enter Company Name

   <u>Note:</u> You can Click the 'Add Affiliation/Alias' button to add additional affiliations/alias for this party

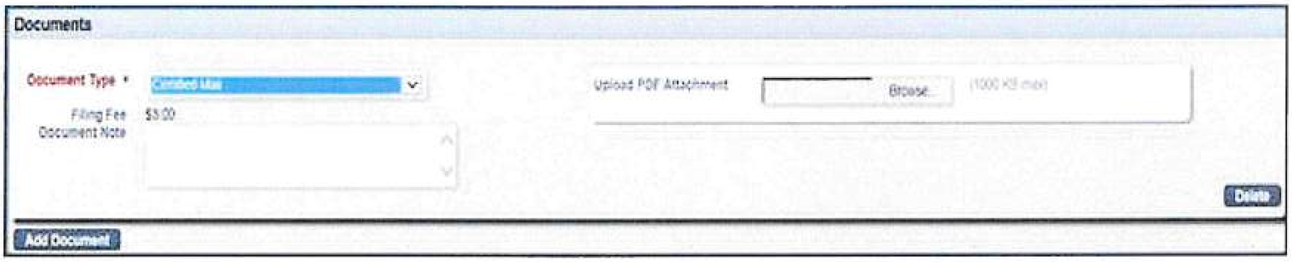
Adding the 2nd Party

- Navigate to the Party #2 section and follow instructions above.

<u>Note</u>: The 'New Case Request' screen automatically displays data fields for two parties.

Adding Additional Parties

- Click the '<u>Add Party'</u> button.
- Continue to follow instructions until all parties are entered.



Adding Documents/Filing Attachments

1. Select the '<u>Document' type</u> using the drop-down list.
2. Enter '<u>Document Note'</u> text if desired.

   <u>Note:</u> Document Note' is a free-formed field allowing you to add additional information regarding the document being filed. Information entered in this field will be included in the docket text in the Court's record for this case if accepted by the Reviewer.

3. Upload your PDF attachment by Clicking the 'Browse' button.
4. Navigate to your document to attach.
5. Select the appropriate document by double-clicking the document.

-or-

   Highlight your document and click the Open button.

<u>Note:</u> If another 'Browse' button appears you may select it to attach an additional PDF document if desired. The number of attachments that can be selected is determined by the Court. This number may vary based on the 'Document Type' selected.

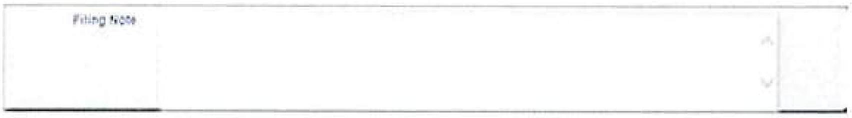
- If a PDF is uploaded and exceeds the max file size allowed by the Court, a message displays, "File is too large to attach."
- To view your attached document, Click on the document name.
- To remove your attached document, Click the 'Delete' button to the right of the document name.

Adding Additional Documents:

1. Click the 'Add Document' button.
2. Follow instructions above
   - Number of Documents that can be entered is determined by the filing document & by the court rules.

Adding a Filing Note

The Filing Note field located at the bottom right of the screen allows the Filer to give additional information regarding the filing. This information will be seen by the Reviewer and will also be visible on the eFile record in your 'My Filings' queue. This information is <u>NOT</u> stored in CourtView.



Cost Section

The Cost Section, at the bottom of your screen, displays a detailed description of the amount you will be required to pay to submit your Filing(s).

- <u>Convenience Fee</u> - A fixed amount or percentage of the total
- <u>Action Costs</u> - Total of Document Fees associated to the Initiating Action code selected
- <u>Document Fee</u> - Amount associated to the Docket(s) selected.
  - **Total** - Total of Convenience Fee, Action Costs, and Document Fee
  - **Paid** - Amount paid on case.
  - **Owed** - Amount owed on filing.

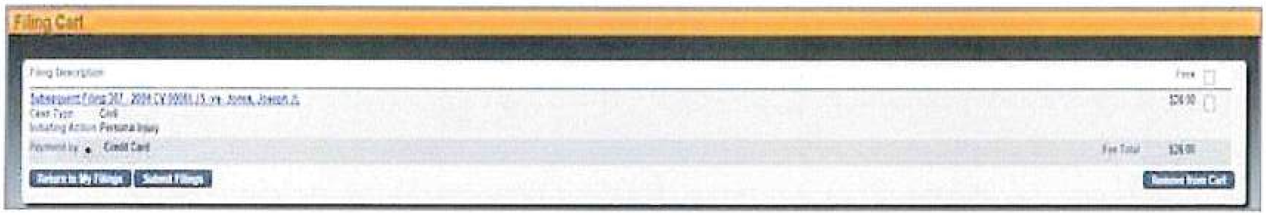
<u>Note</u>: The following fields ONLY display in the Cost Section for **<u>Receipt Depositor filers</u>.** (This feature is available at the Court's discretion.)

- <u>Account Balance</u> - Total amount available in the Receipt Depositor account, attached to the Filer.
- <u>Allocated -</u> Amount allocated to current filings that have not yet been accepted by the Reviewer.
- <u>Balance Remaining</u> - Total balance remaining on the Receipt Depositor account, attached to the Filer.
  - Select '<u>Continue with Filing</u>' to continue with the filing process.
  - <u>Cancel</u> – Returns you to the 'My Filings' work queue and cancels any additions or changes made to the New Case or Subsequent Filing request. Information entered on your screen will NOT be saved if you select this option.
  - <u>Save</u> – Saves any additions or changes made to the New Case or Subsequent Filing request.

<u>Note</u>: When the 'Save' or 'Continue with Filing' options are chosen, a unique identifying number, known as the 'eFile ID', will automatically be assigned to the Filing. This number will help track the Filing as it proceeds through the system.

- Select '<u>Add to Cart</u>' to continue with the filing process.
- <u>Return</u> – **to return to 'My Filings' queue.**
- <u>Modify</u> – **to make changes or modifications to your filing.**
- <u>Add to Cart</u> – **to continue with the eFile process.**

Important: The Filing Cart allows a filer to process and submit more than one Filing at a time, during the session. The cart lists the filings separately with the 'Total' fees owed being displayed.



- Select '**Submit Filings and Pay Now**' to submit your Filings to the Court

Filing Cart:

- Return to My Filings – To return to 'My Filings' queue.
- Submit Filings – To submit your Filings to the Court
  - Selecting this option will automatically navigate to the payment option
- Remove from Cart – Removes a Filing from the cart.
  - o Check the Box in the right margin of the Filing you wish to remove
  - o Click the 'Remove from Cart' button

If a payment is required, follow the instructions on the screen to make your payment to complete your eFiling transaction.

- Click on 'MY FILINGS' to return to your filing que.
  - o Depending on the court rules will determine if the filings are file stamped at submission or once the clerk accepts the filing. (See Court Local Rules)
  - o User will receive an email once the filing has been accepted by the clerk or if the filing is rejected.

Filing a Subsequent Filing

Subsequent Filings are Filings made on a case that already exists in CourtView regardless of how the case was initiated.

- All Case types may not be available for eFiling. The decision as to which Case types can be processed through eFiling is determined by the Court.
- Only cases available for eFiling will display the 

 button.

Subsequent Filings can be accessed from multiple areas in eAccess:

1. **From 'My Filings' queue**
   - If you know the Case Number:
     - Enter the Case Number in the Case Number field.
   - Click the 'Create Subsequent Filing' button.
   - If you don't know the Case Number:
     - Click the 'Create Subsequent Filing' button.
   - Use the Search options to find your case.
   - Click the eFile button next to the Case Status

- To select a case listed in your 'My Filings' queue:
- Click the + sign to the right of a previous Filing.

2. **Update the Attorney Bar No. field, if desired**
   - Attorney Bar No defaults to the bar number of the eUser logged in but can be changed to any valid bar no that is *registered* as an eUser and exists in CourtView.
   - Enter a Reference Tag, if desired
   - The 'Reference Tags' field is a free formed text field to help the filer identify the case (such as an internal case or tracking number)
3. **Adding a new party to an existing case**
   - Click the 'Add a Party' button.
   - Click the 'Rep by Atty' field for those parties represented by the attorney listed at the top of the screen.
   - Select the 'Party' type using the drop-down list.
   - Enter the name of the party using either: Last, First, Middle Name fields (Suffix field, if applicable)

   -or-

   Company field
   - Select the Address Type using the drop-down list (ONLY if an address will be entered)
   - Enter Address information.
   - Address information may be required by the Court even though it is not required by JusticeFiling.
   - The Address Type field becomes a required field if the address fields are populated.
   - There are 3 address lines in addition to the City, State, Zip fields.
   - Entering the Zip code will populate City and State
   - The zip code entered MUST be a valid zip code within CourtView.
   - A four-digit extension for Zip code can be entered ONLY if valid within CourtView.
   - Select the Phone Type (ONLY if a phone number will be entered)
   - Enter Phone No (if desired or required by the Court)
   - Enter email (if desired or required by the Court)
4. **If the party has an alias, DBA, or other affiliation, Click the 'Add Affiliation/Alias' button.**
   - Select the down arrow on the 'Affiliation' field.
   - Select the appropriate affiliation or alias type.
   - Enter Last Name, First Name

-or-

- **Enter Company Name**

Note: You can click the 'Add Affiliation/Alias' button to add additional Affiliations/alias for this party

Add Documents for Filing

1. Select the 'Document' type using the drop-down list.
   - Type of filing that you adding to be filed with the court.
   - Ensure look through list as some courts have these document types as generic codes and some are very specific.
2. Upload your PDF attachment by Clicking the 'Browse' button.
3. Navigate to your document to attach.
4. Select the appropriate document by double-clicking.

-or-

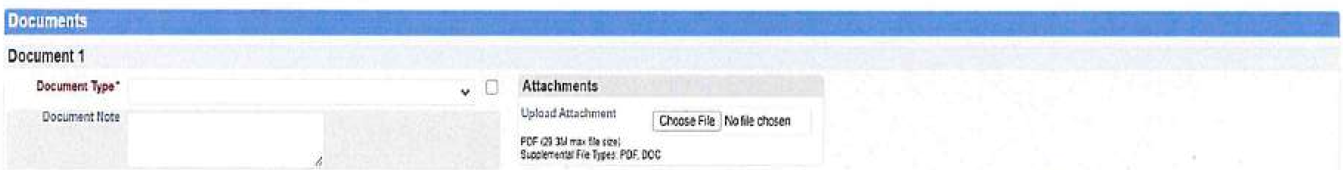
Highlight your document and click the Open button.

Note: If another 'Browse' button appears you may select it to attach an additional PDF document, if desired. The number of attachments that can be selected is determined by the Court. This number may vary based on the 'Document Type' selected.

- Filing must be a PDF for the attachment
  - If a PDF is uploaded and exceeds the max file size allowed by the Court, a message displays, "File is too large to attach."
    - Contact the court and they might be able to increase the file size.
- To view your attached document, Click on the document name.
- To remove your attached document, Click the 'Delete' button to the right of the document name.
- If filing a proposed order, these normally need to be DOC file, but some courts allow a PDF, etc. Look at the attachment section for filing types allowed.

5. Enter '**Document Note'** text if desired.
   - Some courts might require this in their local rules to provide more information regarding the filing submitting.

Note: Document Note' is a free-formed field allowing you to add additional information regarding the document being filed. Information entered in this field will be included in the docket text in the Court's record for this case, if accepted by the Reviewer.



To add additional Documents:

- Click the 'Add Document' button.
- Follow instructions above
- Number of Documents that can be entered is unlimited.

Filing Note

The Filing Note field allows the Filer to give additional information regarding the filing.

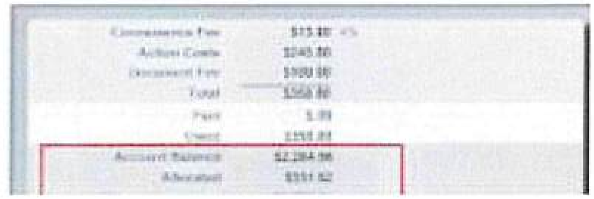
- This information will be seen by the Reviewers and will also be visible on the eFile record in the 'My Filings' queue. This information is NOT stored on the case.

Request for Jury Trial

This can be flagged to request a Jury trial. In most courts this will add the fee to be paid on the case for the Jury Trial.

Cost Section

The Cost Section, at the bottom of your screen, displays a detailed description of the amount you will be required to pay to submit your Filing(s).



- Convenience Fee - A fixed amount or percentage of the total.
- Action Costs - Total of Document Fees associated with the Initiating Action code selected.
- Document Fee - Amount associated with the Docket(s) selected.
- Total - Total of Convenience Fee, Action Costs, and Document Fees, ,etc.
- Paid - Amount paid on case.
- Owed - Amount owed on filing.

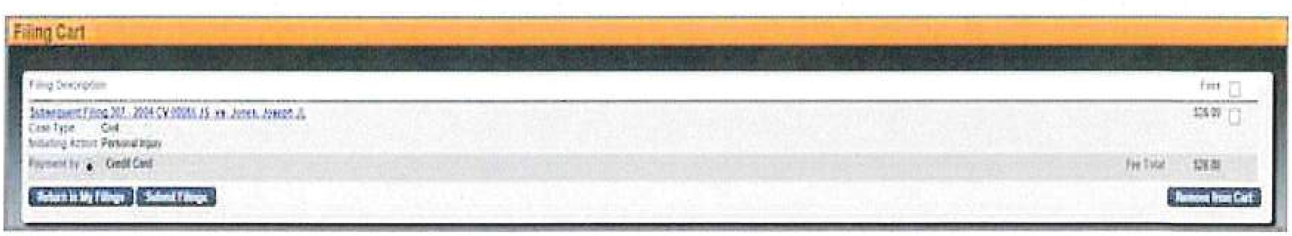
Note: The following fields ONLY display in the Cost Section for Receipt Depositor filers.

- This feature is available at the Court's discretion.
  - Account Balance - Total amount available in the Receipt Depositor account, attached to the Filer.
  - Allocated - Amount allocated to current filings that have not yet been accepted by the Reviewer.
  - Balance Remaining - Total balance remaining on the Receipt Depositor account, attached to the Filer.
- Selecting 'Continue with Filing' to continue with the filing process.
- Selecting Cancel – Returns you to the 'My Filings' work queue and cancels any additions or changes made to the New Case or Subsequent Filing request. Information entered on your screen will NOT be saved if you select this option.
- Selecting Save – Saves any additions or changes made to the New Case or Subsequent Filing request.

Note: When the 'Save' or 'Continue with Filing' options are chosen, a unique identifying number, known as the 'eFile ID', will automatically be assigned to the Filing. This number will help track the Filing as it proceeds through the system.

- Selecting 'Add to Cart' to continue with the filing process.
- Selecting **Return – will return to 'My Filings' queue.**
- Selecting **Modify – to make changes or modifications to your filing.**

Note: The Filing Cart allows a filer to process and submit more than one Filing at a time, during the session. The cart lists the filings separately with the 'Total' fees owed being displayed.



- Select '**Submit Filings and Pay Now'** to submit your Filings to the Court
- Return to My Filings – To return to 'My Filings' queue.
- Submit Filings – To submit your Filings to the Court

Note: Selecting this option will automatically navigate to the PayPal payment option (unless you have a Receipt Depositor account set up with the Court)

- Remove from Cart – Removes a Filing from the cart.
    - Check the Box in the right margin of the Filing you wish to remove
    - Click the 'Remove from Cart' button

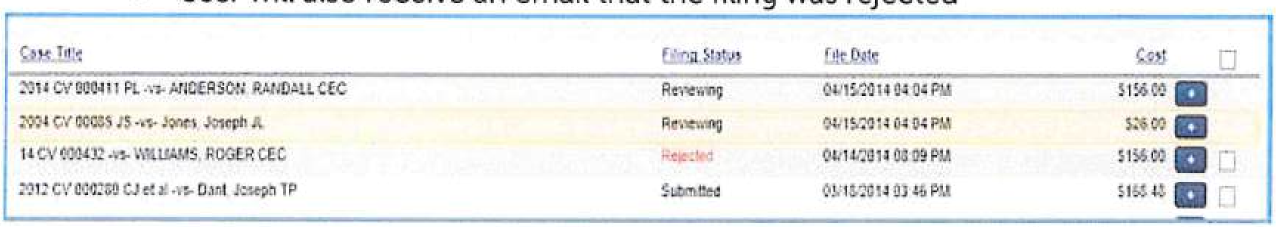
Follow instructions on the screen to make your payment to complete your eFiling transaction.

- Click on 'MY FILINGS' to return to your filing queue.
    - o Depending on the court rules will determine if the filings are file stamped at submission or once the clerk accepts the filing. (See Court Local Rules)
    - o User will receive an email once the filing has been accepted by the clerk or if the filing is rejected.

Viewing Rejected Filings

Filings rejected by the Reviewer will change the status of the Filing in your 'My Filings' queue to 'Rejected' and display in red text for easy identification.

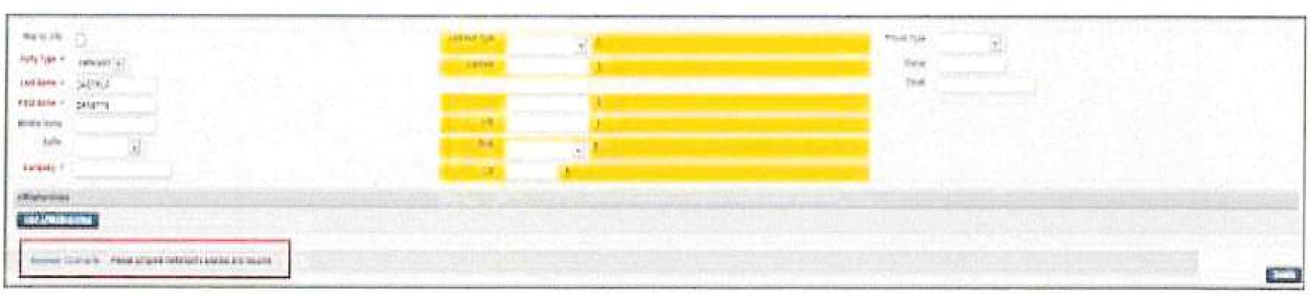
- User will also receive an email that the filing was rejected



Case Title	Filing Status	File Date	Cost
2014 CV 000411 PL -vs- ANDERSON, RANDALL CEC	Reviewing	04/15/2014 04:04 PM	$156.00
2014 CV 00005 JS -vs- Jones, Joseph JL	Reviewing	04/15/2014 04:04 PM	$26.00
14 CV 000432 -vs- WILLIAMS, ROGER CEC	Rejected	04/14/2014 08:09 PM	$156.00
2012 CV 000280 CJ et al -vs- Dant, Joseph TP	Submitted	03/18/2014 03:46 PM	$166.48

Correct 'Rejected' Filings

1. Click on the Filing to open the record.
    - All fields flagged by the Reviewer are identified by yellow highlighting.



Below each section is a 'Reviewer Comments' field which allows the Reviewer to give specific instructions to the Filer. Depending on the court could be in each section or all listed in the last section of Reviewer Comments.

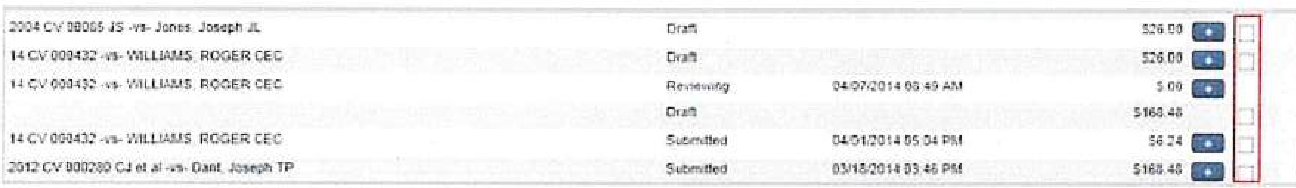
2. Update the Filing as instructed by the Reviewer.

3. Click the **'<u>Continue with Filing</u>'** button.
4. Click the **'<u>Submit Filing</u>'** button.
    - The Filing Status will change to Resubmitted/Refiled.
    - Review the court local rules for the rules for how the time stamp will work for Rejected filings that are resubmitted.

To Delete Filings From 'My Filings' Queue

Filings are available to be deleted from the 'My Filings' queue provided they are in one of the following statuses:

Status	Filing deleted from 'My Filings' queue	Filing deleted from Reviewer queue
Draft	X	
Filed / Submitted	X	X
Rejected	X	X
Refiled / Resubmitted	X	X
Completed	X	X



1. Click the box on the right margin for the record you wish to delete.
2. Click the 'Delete' button at the bottom of the screen.

3. Click the 'Yes' button at the prompt:
    - 'Are you sure you want to delete the selected filings?'

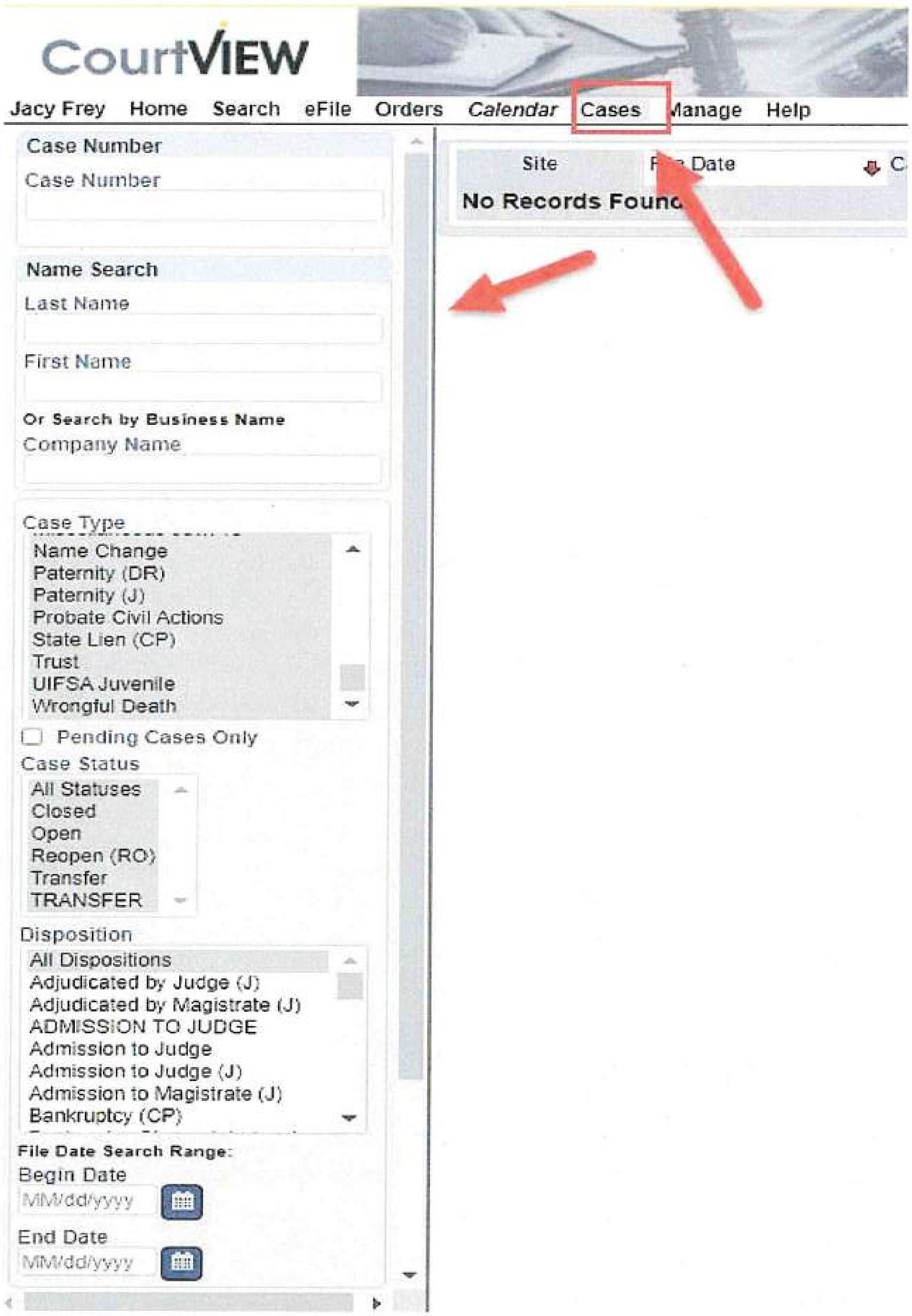
<u>*Note:*</u> The selection box appears only on Filings that are eligible to be in a 'reviewing' or 'accepted' status are not able to be deleted while in that status.

- o Deleting Filings in the 'My Filings' queue will not affect filings submitted to the Court.
- o However, your deleted Filings cannot be restored.

Attorney Case View

The cases tab will provide an easy way for attorneys that are registered and logged in with a bar code to see cases that they are an attorney in the CMS application, and easily eFile and view cases as needed.

- Attorney can enter a case number or apply search options to search for cases.
- Click Search at the bottom of the search criteria.
- Click the STAR next to case to save this case for your view.



Additional Filing Information:

Requesting Waiver Of Fees

If no case has been created yet, won't be able to do this process. So, would need to file with the court and do it manually from there.

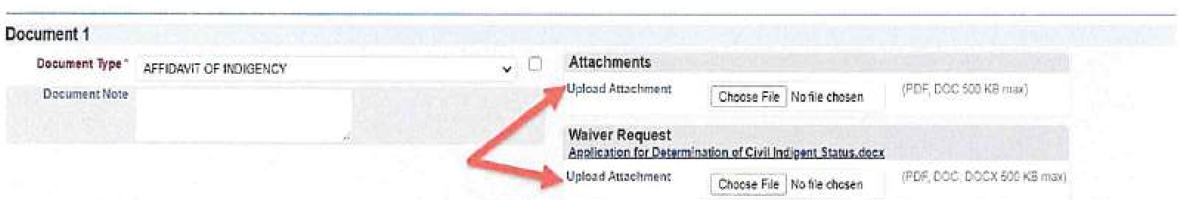
1. The filer will add the application of indigency (or whatever docket they use)
2. On the docket code will have the option to **Download the Template** for the Poverty Affidavit
3. Filer will upload the Poverty Affidavit and attach the document to their filings submitting for indigency.

   IF WANT A TIME STAMPED COPY

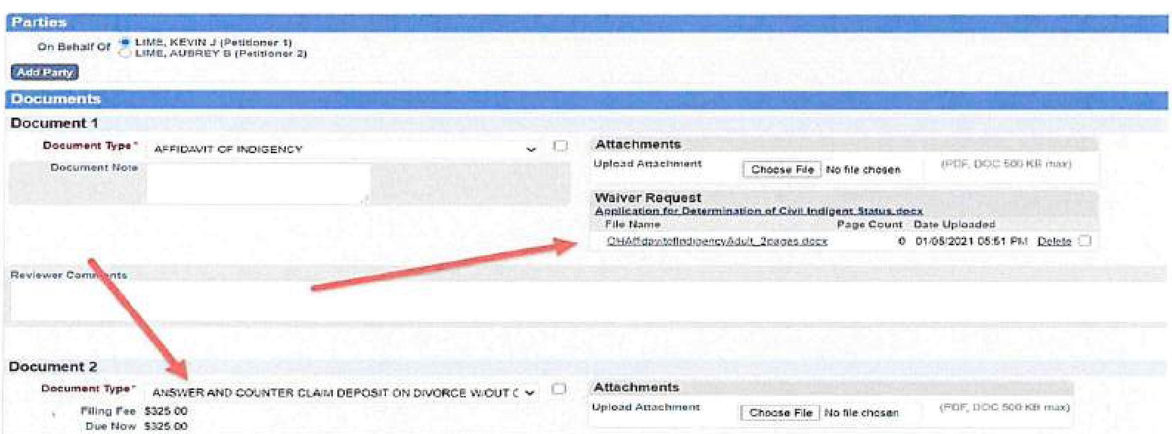
   - Attach in the ATTACHMENT section so can time stamp the document **and attach again the** WAIVER section so the money will get dismissed when accepting the filing.

   IF DONT WANT A TIME STAMPED COPY

   - Attach in the WAIVER section **ONLY.**



4. Select the party this filing is on behalf of at top of the filing screen. (Above document section)
5. Add any additional document types that they are filing.



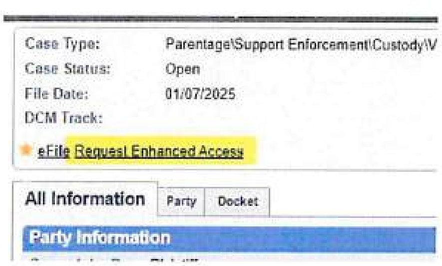
5. Click Submit Filing
6. Once the Waiver is accepted the money will be moved to dismissed.

Requesting Enhanced Case Access

If the court is configured to all the user to request access to more information on cases, this will be available in the portal once the case is opened by the user, or the attorney portals can request additional access by requesting in the Cases Tab when logged into the portal. To request access for cases they must be available in the current portal in order to request additional access to the case. Requesting Access is giving additional access to cases already have access to but to allow more access into another portal if available.

To request access to cases:

Public Portal request can be made when opening the case under Search Tab, the link to request access will display at the top of the



Attorneys also have the ability to request access by clicking the CASES tab in the top menu and scrolling to the bottom of the screen to the REQUEST ENHANCED ACCESS LINK.

- Click Cases Menu
- In the left Search Menu- scroll to the bottom
- Enter the case number to request access (case number must be entered exactly as formatted by the court)
- Click the Request Enhanced Access

Figure 1 Cases - Request Access

Note: *An email is sent to the requester and the Administrator to review the request. Once the request is reviewed will receive an email with the decision.*