eFiling Guide

This guide provides you detailed instructions on submitting eFilings in the eFileManager system through FileTime.

It also provides a run through of how the eFileManager eService system works.

If you have any questions about eFiling you will be able to find the answer here.

Please note: Every jurisdiction has different rules/ regulation. Some of the information you see below may not apply to you. Please contact the clerk or call our customer support like to get more details.

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Chapter 1

XIV. FileTime Overview

A. Top Navigation Bar

1. **Workspace**
   Clicking the Workspace button returns you to the area from which you can eFile and eServe and manage all your eFilings and eServices. When clicked on Workspace you have access to all the functionalities described below for the Workspace Sub-Navigation bar (section B) below.
2. **Admin**
   This button is visible only to persons designated as a firm eFiling administrator. Clicking this button takes you to the Firm Admin area(section **C** below).
3. **My Account**
   Click this button when you need to change your password, change your name in the eFiling system, or update which notification emails you receive from us. See section **D** below for more information about this section..
4. **Training**
   We provide several training options. Click this button to view our training options (section **E** below).
5. **Submit Filing(s)**
   Clicking this button is one of the ways to start a new submission.

B. Workspace Sub-Navigation Bar

You will be automatically taken to this sub-menu when you login.

1. **Dashboard**
   You will be automatically taken to this feature when you login.
2. **Submit Filing(s)**
   Clicking this button is one of the ways to start a new submission.
3. **Cases**
   This feature enables you to view all cases both active and archived, and view details about that case, update your firm's service contacts list for each case and submit a new filing for the case.

4. **Submissions**
   You will find all of your submissions in this section. After finding a specific submission you can view and print details about the submission, resubmit a rejected submission, and archive cases.
5. **Filings**
   A submission can contain multiple filings and you can view all individual filings in this section. Additionally, you can view and print the filing details, resubmit a rejected filling, and archive filings for inactive cases.
6. **Drafts**
   You can save an unfinished submission as a draft at any point in the submission process. Return to the Drafts section at any time to resume the submission process.
7. **eServices**
   Under the eServices button you have the following options under the drop-down menu:
   - **Inbox** - Go here view and print eService details and service documents served on you.
   - **eService Outbox** - Go here to view details about service by you to counsel.
   - **Fax Service Outbox** - Go here to view details about FileTime Fax Service sent by you to case counsel.
   - **eServices Search** - Go here to search to see if an attorney is listed on the eFileManager Public Service Contact List. A Yes means that you will be able to eServe that attorney.
8. **Templates**
   Under the templates button you have the following options under the drop-down menu:
   - **Case Templates** - This function enables you to use a Case Template created by your Admin team to start a new submission.
   - **Case Party Templates** - You and/or your firm members can create templates containing the names and addresses of parties your firm often represents. In this section you can add new case party templates and edit existing templates.
9. **Admin Sub-Navigation Bar**
   The Admin sub-navigation bar (Figure 1-2) displays when you click on the **Workspace** button.

Figure 1-1, Workspace Sub-Navigation Bar

1. **Firm Users**
   Manage all your firm users in this feature. You can add new users, opt your firm attorneys (except texas) into the eFileManager Public Service Contact List, update user names, inactivate users from your firm account, assign a role of firm manager to additional registered firm staff, change user passwords, and more in this area.

2. **Firm Info**
   Go here to update your firm information in the eFileManager system, make it mandatory that your firm filers enter a matter/client number for every submission, request that your firm be made sales tax exempt, and enable firm attorneys and staff to self-register with the eFileManager system through your firm account.

3. **Payment Accounts**
   You must create at least on firm Payment Account in order for your firm to be able to eFile. However, you can create as many as needed. You can use a credit card or debit card for each Payment Account. Creating a Waiver Payment Account allows your filers to submit filings for indigent and other no-fee cases you have. Some states now accept eChecks.

4. **Firm Fee**

   This feature enables you to choose the FileTime fee plan that best fits your firm needs.

5. **Firm Contacts**
   This feature is purely optional. By entering your firm's main Administration, IT, and Accounting contacts in this area you enable us to more quickly contact the correct person in your firm if any issues arise.

6. **Service Contacts**

   There are two features available when you click the drop-down arrow for Service Contacts:

   - **Firm Service Contacts** - In this section you should enter the names of all firm attorneys and staff that will be designated to receive eService from counsel. On this page you can also add attorneys and staff members (if desired) to the eFileManager Public Service Contact List. Names entered here will automatically populate the Service Contact selection list when a filer is submitting a filing and searching to add firm service contacts to the case.
   - **Non-Firm Service Contacts** - In this section you will be able to manage other firm counsel your firm members have added as non-firm service contacts because those counsel were not opted in to receive eServices for cases.

7. **Attorneys**
   The list of attorneys on this page will automatically populate the attorney-of-record selector when a filer is submitting a new case filing. Attorneys who are registered in the eFileManager system will automatically display on this page. You can add attorneys to this list without registering them in the eFileManager system.

8. **Reports**
   The Reports feature contains many different report types you can run, whether it be to assist in billing, to check on submissions/filing for a specific case, check on submissions by a specific staff member, etc.

9. **Case Templates**
   This feature enables you to create case templates to be used by staff to file in new cases. The template saves the filer time because the template data is defaulted into the new case filing.

D. My Account Sub-Navigation Bar

This feature contains all data specific to you in FileTime and the eFileManager system.

Figure 1-3, My Account

1. **Personal Info**
   Go here to update your name, opt in to be added to the eFileManager Public Service Contact List, or to update your security question. This may not apply to all states.
2. **Notification Preferences**
   We automatically send a number of eFiling and eService status emails to you. In this section you can manage which ones you wish to receive.
3. **Change Password**
   Go here to update your password. This is especially important to do if you or we had eFileManager manually update your password because the automated Forgot Password function did not work correctly for you.

E. Training Sub-Navigation Bar

We offer a number of training options including:

Figure 1-4, Training Options

1. **Training Options**
   Click this button to view our training options such as (1) live Internet-based training, (2) written guides such as this, and video training.
2. **Register for Training**
   Go here to register to attend one of our live Internet-based training sessions.
3. **Videos**
   Go here to view our training videos.

F. Submit Filing(s)

Clicking this button is one of the ways to start a new submission.

Chapter 2

XIV. General Guidelines for eFiling and eService

A. Time stamp time and date

The time stamp reflects the instant you click the submit button at the time of Submission. So, assuming you click the submit button at 5:15 PM Friday afternoon and the clerk does not accept the filing until Monday morning, your file stamp will still show 5:15 PM Friday afternoon.

However, eFilings submitted on Saturday, Sunday, or any legal holiday will be file stamped as of the next business day.

Additionally, the time stamp reflects the local time at the receiving jurisdiction, not the location from which you submit the eFiling. For example, submit a filing at 5:59 PM in Harris County (CST) into El Paso County (MST) and the file stamp will show 4:59 PM. Note: This may not apply to each Jurisdiction within the eFiling System. Please check with the clerk to see if this will apply to you.

B. Deadlines

You may submit a filing until midnight and the filing is considered to have been filed that day. Filings submitted on Saturday, Sunday, or any legal holiday are considered to have been filed the next business day.

eFiling does not, however, extend eFiling deadlines. So, if you have a 10:00 AM filing deadline for a specific document, you must click the Submit button on that eFiling by 10:00 AM.

C. Rejected Filings

You may resubmit a filing previously rejected by the clerk of court and it will be considered as having been filed at the time of the original (rejected) filing. We highly recommend that you enter a note to the clerk in your follow up that it is a replacement for the rejected filing.

All filing fees are refunded when your filing is rejected by the clerk.

D. Canceled Filings

You may cancel submitted filings until the clerk's office begins reviewing it. FileTime enables you to cancel:

- An entire submission (all filings in the submission) if the clerk has not opened any of the filings in the submission or
- A specific filing in those instances when you submitted multiple filings with one submission.

All filing fees are refunded for a filing when you cancel the filing.

E. Filing Statuses

There are five possible statuses for submissions in the eFileManager system:

- **Submitted** - Your filing(s) has/have been submitted to the court and awaiting review by the clerk's office.
- **Under Review** - The intake clerk has locked your filing for review and it can no longer be canceled. If there were multiple filings in the submission, the other filings may not yet be in the review process (but they will be very soon) since the clerks review each filing separately.
- **Accepted** - When the intake clerk accepts the filing, the document enters the court records, the final debit is placed on your Payment Account for the filing, and you are sent the **Accepted Filing Noti ication** email.

- **Canceled** - When you cancel a submitted filing it then displays a status of Canceled. You will be sent the **Canceled Filing Notification** email.
- **Returned for Correction** - The clerk may return your filing if it does not meet the standards. In this event all your filing fees for that filing will be refunded. Pursuant to the rules governing eFiling, the clerk is to consider your follow up filing as having been submitted at the same time as the original (rejected) filing. You will be sent the **Returned for Correction Filing Notification** email.
- **Failed Filing** - The eFileManager system can Fail a filing because of issues with the document(s) in the submission. You will receive a Failed Filing Notification email.

F. Time of Service (electronic service or eService)

The time of service is the time that the service notification is emailed to the service contact. The contact process is controlled entirely by eFileManager so we cannot provide an exact time of delivery. However, eFileManager assures us that service is delivered a couple minutes after submission.

Every jurisdiction has their own rules and regulations. This is a general guide for your benefit. Please contact the clerk or call our customer support like to get more details on specific rules of the jurisdiction you are filing in to.

Chapter 3

XIV. Integrated versus Non-Integrated Jurisdictions

Before you begin filing it is important to understand that there are two major distinctions between the jurisdictions that accept eFileManager eFilings.

A. Integrated Jurisdictions

An integrated jurisdiction is one that provides case data with eFileManager, which in turn provides the case data to FileTime. When you have not previously eFiled into a case, you will need to search for it in the eFileManager system. The process will be explained in the next section.

When you are searching for a case in an integrated case and the case is found, nearly all case data will automatically populate your Case Information page so you have very little case information to add.

B. Non-Integrated Jurisdictions

A non-integrated jurisdiction is one that does not provide case data with eFileManager. Because of that, eFileManager cannot provide any case data to FileTime.

When you file into an existing case in a non-integrated jurisdiction you will need to enter all case data, including case parties. This is because it has not yet entered the eFiling System.

When you search for the case you will be presented with the following message:

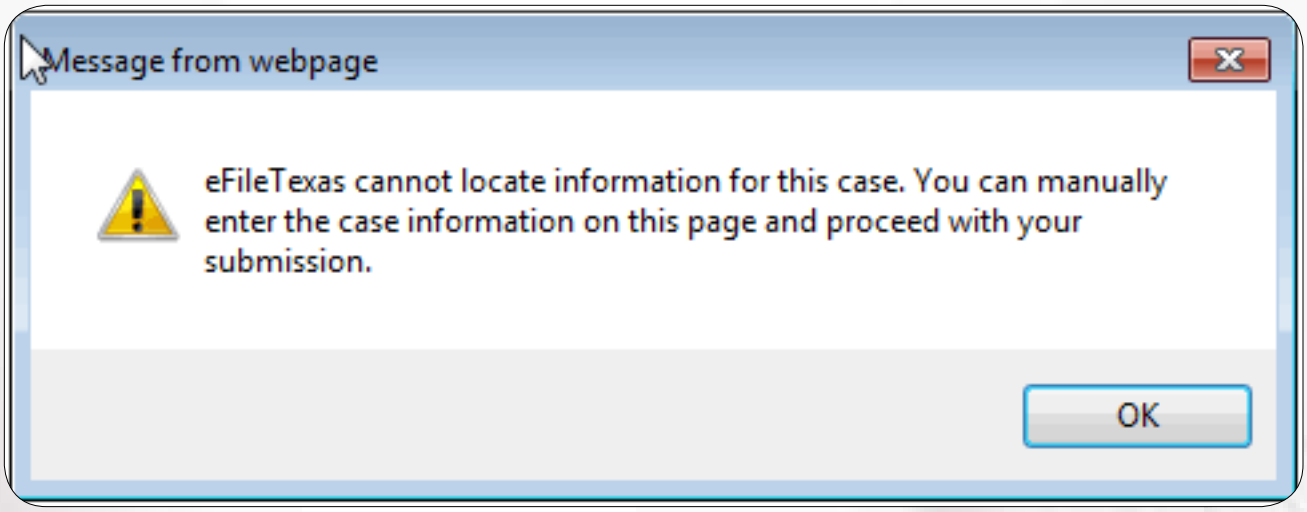


Figure 3-1, Case Information Not Found

Clicking the **OK** button returns you to the Case Information page where you will then manually enter the case information.

Chapter 4

IV. Six Ways to Start a Submission

After you login you will be taken to the Dashboard page (**Figure 4-1, B**). This is found under the Workspace tab (**Figure 4-1, A**) if you need to return from the **Admin** or **My Account** areas.

You will also find a list of cases under the **Cases** section. The difference between these two pages is:

- On the **Cases** page you can bookmark existing pages and view details about cases.

On Case you will be able to Submit a new filing for the case by clicking the **File** button .

You can also remove an inactivate case by clicking the **Archive** button (An archived case is not deleted and may be accessed in the **Case Archive** (Chapter 12) section from which you can reactivate the case at any time.

A. Submit an Existing Case Filing

You have two options when filing into an existing case.

If you, or someone in your firm, have previously filed in the case, you will be able to find it in the **Cases** pages. Click the **Submit** button (**Figure 4-2, I**) for that case and you are taken to the Case Information page. Follow the submission process from there. The Cases page (Figure 4-2) is also under the Workspace (Figure 4-2, A) section.

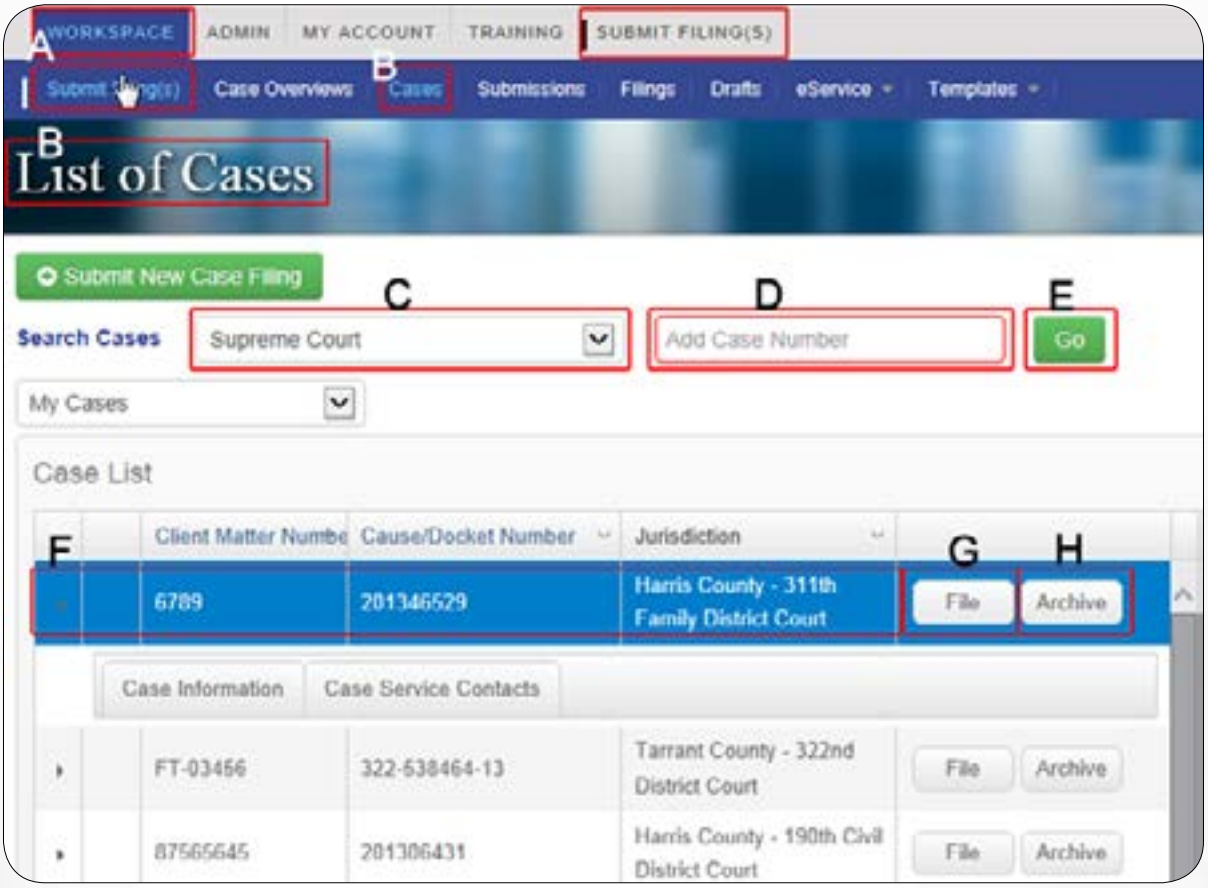


Figure 4-2, Cases Page and Search for Existing Cases

If you have not previously eFiled in the case through FileTime, you will not find the case in the grid. Search eFileManager for the case information by:

- Selecting the jurisdiction (**Figure 4-2, C**). Remember that you will not find the case if you do not select the correct jurisdiction. Then
- Entering the **Case/Cause/Docket Number** (**Figure 4-2, D**) - Be certain to enter the number exactly as it is exists with proper capitalization.
- Clicking the **Go** button (**Figure 4-2, E**).

If you are filing into an Integrated jurisdiction (**Chapter III, A**), nearly all of the information for the case will populate on the Case Information page (next section).

However, if you are filing into a non-integrated jurisdiction (**Section III, B**) the case information will not be found and you will see a pop-up message (**Figure 3-1**) alerting you that the case information is not available.

B. Submit a New Case Filing

Click one of the **Submit Filing(s)** buttons (**Figure 4-3, i)** when you want to submit a new case filing for which there is not an existing cause or docket number. You will be taken to the **Case Information**

page (**Figure 4-3**) to begin the submission.

Here you will click the **This is an Original Petition** button (**Figure 4-3, B**) to begin a new case filing

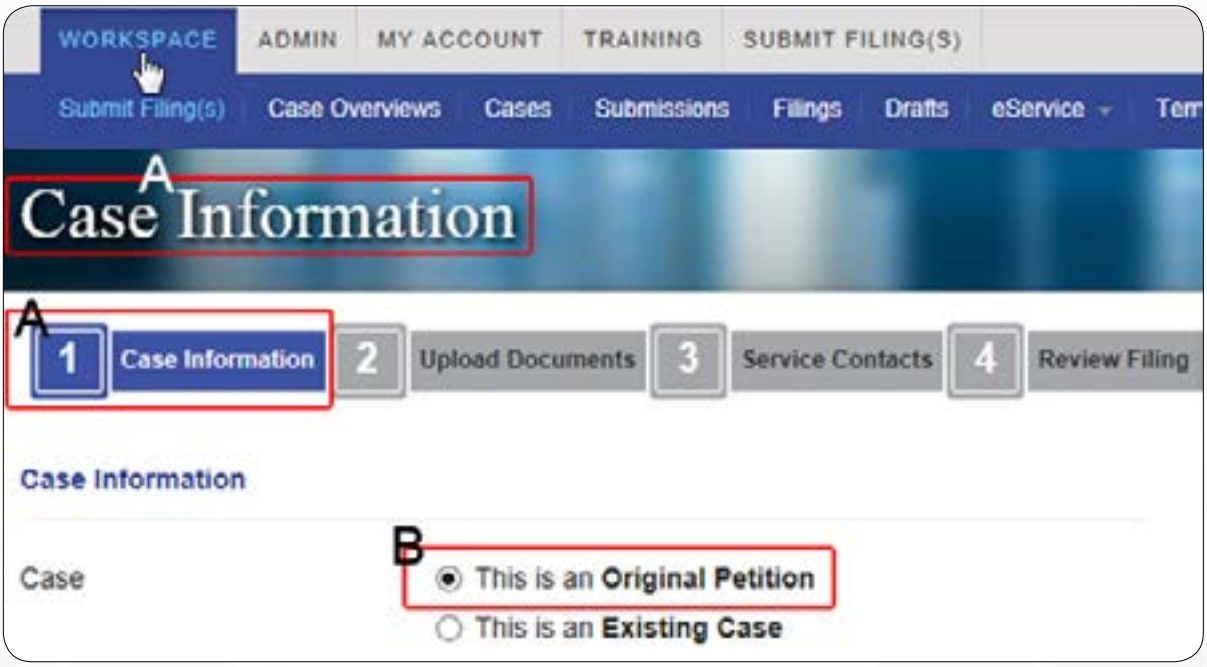


Figure 4-3, Top of the Case Information Page

C. Resume from Draft

The **Drafts** feature (**Figure 4-4, B**) is located under the Workspace section (**Figure 4-4, A**).

If you are interrupted during a submission process you can save the partially completed submission as draft. Later you can finish the submission by going to the **Drafts** page (**Figure 4-4, B**), finding the draft you need (**Figure 4-4, C**), and click the **Resume** button (**Figure 4-4, D**) to restart the submission process.

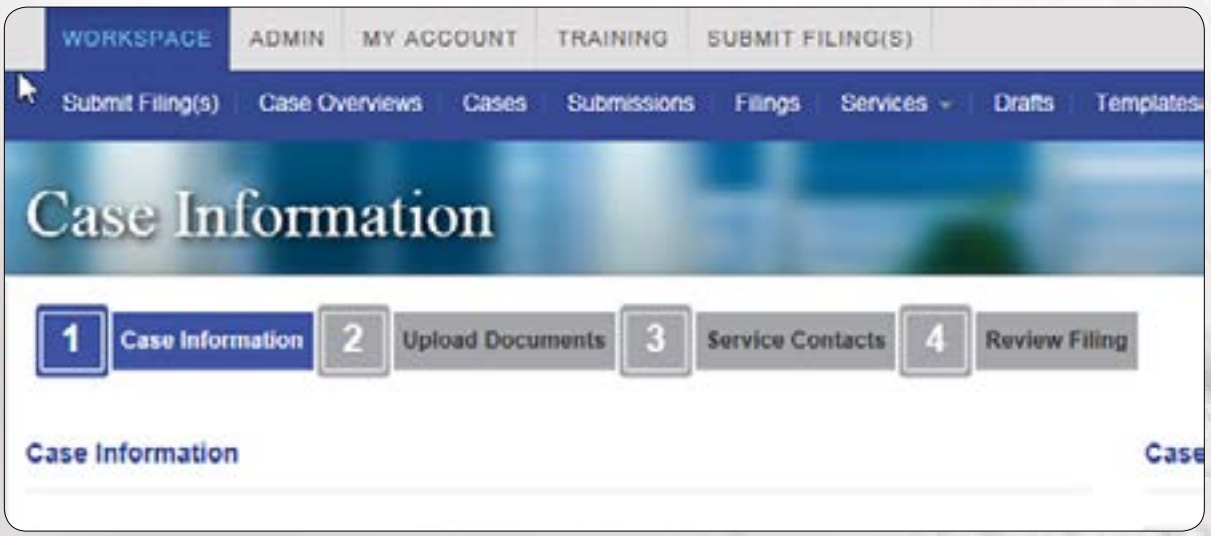


Figure 4-4, Drafts

Click the trash can icon (**Figure 4-4, E**) to delete a draft.

After clicking the **Resume** button you will be returned to the **Case Information** page. Click the **Next** button at the bottom of each submission page until to you reach the point where you left off.

D. Resubmit a Returned for Correction Filing

When a filing or entire submission is rejected by the clerk of court or if the documents are stricken so you must resubmit them to the court, you can save time by using the FileTime **Resubmit** features.

1. Resubmit an Entire Submission

Click the **Returned for Correction Filing** (**Figure 4-5, A**) option on the **Case Information** page.

4-5, Resubmit Entire Submission

FileTime will present to you a list of all of your Returned for Correction submissions. Click the **Select** button for the one you wish to resubmit.

You are returned to the **Case Information** page. Go through the standard submission process.

This will resubmit all of the filings that were included in the submission and preserve your original submission date.

2. Resubmit only an Individual Filing

However, you may need to submit only one filing out of a submission of several.

In this case you will want to resubmit an individual filing instead of the entire submission.

Under the **Workspace** section (**Figure 4-6, A**) click the **Filings** button (**Figure, 4-6 B**).

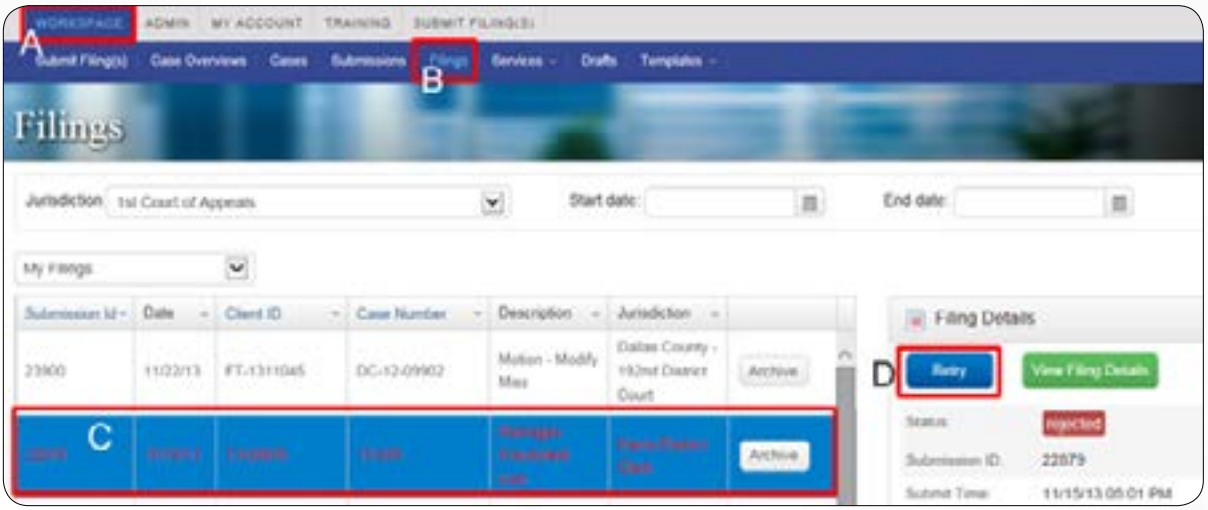


Figure 4-6, Resubmit Rejected Filing

The **Filings** page opens.

Click the row for the Filing that you want to resubmit so it is highlighted (**Figure 4-6, C**).

Click the **Retry** button (**Figure 4-6, D)**.

You are returned to the **Case Information** page. Click the **Next** button until you come to the page where you need to make changes to the filing and do so.

E. Submit a Filing from a Template

If your firm administrator has created a template, find it will find it under the **Case Templates** area (**Figure 4-7, B**).

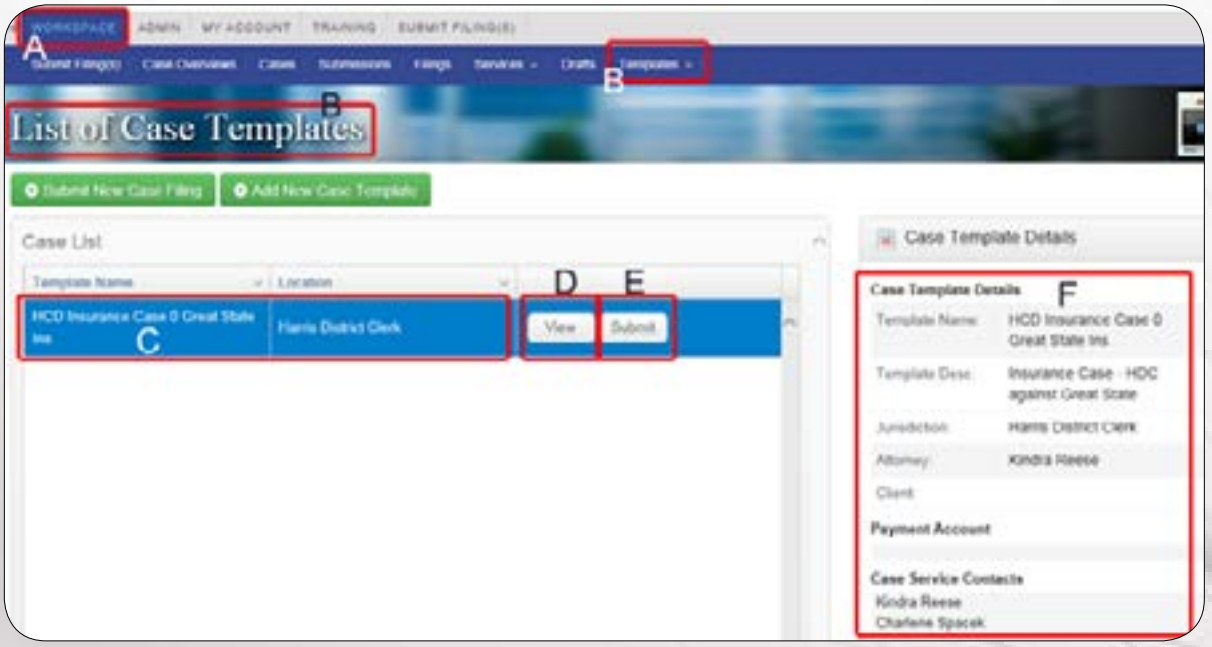


Figure 4-7, Case Templates

Find the filing and click the row to highlight that row (**Figure 4-7, C**) Information about the template displays in the **Case Template Details** section (**Figure 4-7, F**).

Click the **View** button (**Figure 4-7, D)** to see more details about the template or click the **Submit** button (**Figure 4-7, E)** to begin a new submission based upon that template.

A. Submit a Filing from the Alerts Page

The alerts page is a great place, but not the only place, from which to resubmit filings Returned for Correction by the clerk of court or filings rejected by eFileManager.

If there are any applicable Failed filings or Returned for Correction filings, the **Alerts** button on the top navigation bar (Figure 4-8, A) and will flash. the number of unseen alert(s).

Clicking that button opens the **Alerts Manager** page (Figure 4-8). The default view is set to display **My Alerts** only (Figure 4-8, C). Under this default setting:

- The **Alerts** button (Figure 4-8, A) only flashes when there are applicable failed filings, eServices, or faxes for you and
- The **Alerts Manage**r page only displays those applicable submissions.

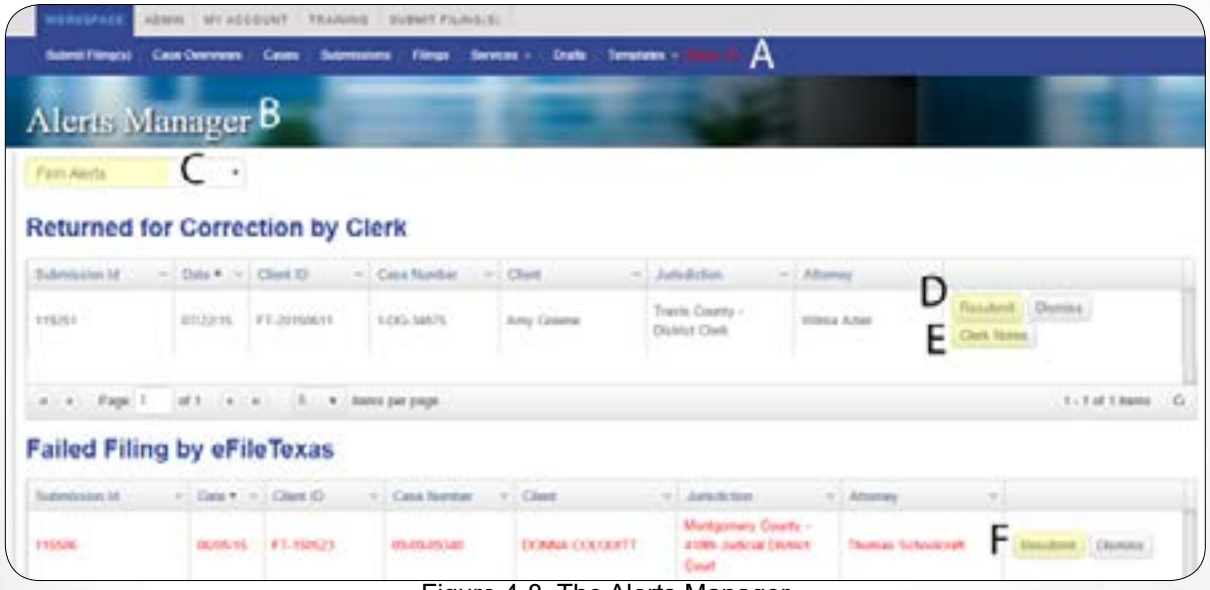


Figure 4-8, The Alerts Manager

However, when it is set to Firm Alerts (Figure 4-8, C):

- The **Alerts** button (Figure 4-8, A) flashes when there are applicable failed filings, eServices, or faxes for and firm filer and
- The **Alerts Manage**r page only displays all the applicable submissions for all members of your firm.

1. **To re-submit a Returned for Correction filing**

   and preserve the original submission time and date:

   - First click the **Clerk Notes** button (Figure 4-8, E) to read what the clerk has told you needs to be corrected.
   - Then, click the **Resubmit** button (Figure 4-8,D) and complete the submission while making the necessary corrections.

2. **To resubmit a Failed filing:**

   - Determine which document caused eFileManager to fail the submission and what was the reason for them to do so,
   - Correct the document, and

- Click the **Resubmit** button (Figure 4-8, F) and complete the submission with the revised document(s).

Click the **Dismiss** buttons to delete an alert from this page.

Any alerts on the **Alerts Manager** page that have not been reviewed are displayed in **red text**.

Any alerts for which the **Resubmit** buttons have been clicked are displayed in **gray text**.

Learn more about why eFileManager fails filings and how to resolve the issues.

Chapter 5

XIV. The eFiling Process - Case Information

The Case Information page is the first page in the submission process. You find it under the **Workspace** section (**Figure 5-1, A**). An easy way to access this page is to click the **Submit Filing(s)** button (**Figure 5-1, B**).

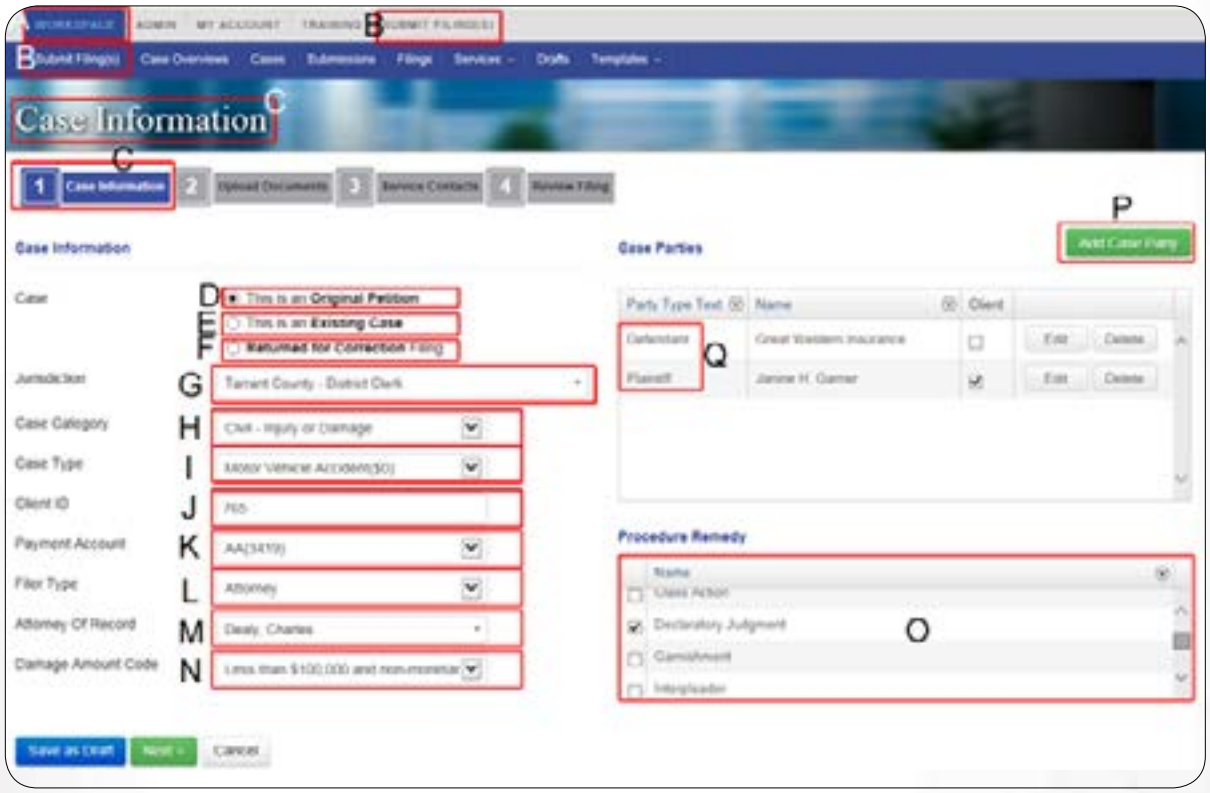


Figure 5-1, Case Information Page

You are now on the **Case Information** page (**Figure 5-1, C**).

A. Select the Filing Type

1. Filing Into a New Case

If you are filing for a new case, click the **This is an Original Petition** option (**Figure 5-1, D**) to begin the submission process. You will need to complete all of the fields on this page as well as adding the case parties.

2. Filing Into an Existing Case

If you are filing into an existing case, click the **This is an Existing Case** option (**Figure 5-1, E**).

The **Search Case** window opens (**Figure 5-2**).

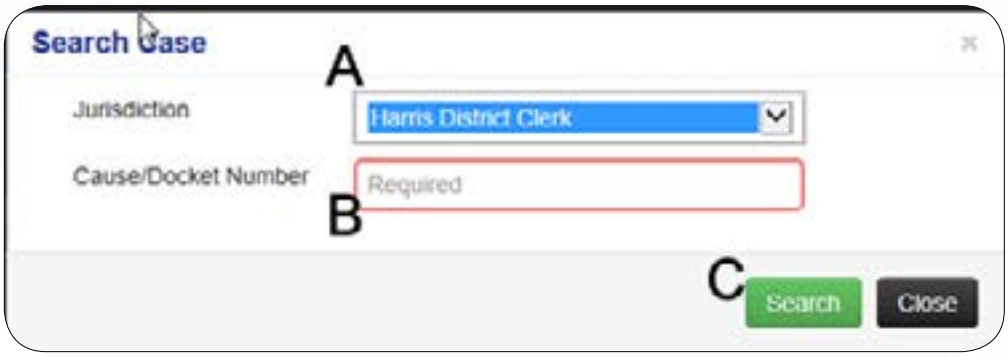


Figure 5-2, Search for a Case

Select the **Jurisdiction** (**Figure 5-2, A**) and enter the **Case/Cause/Docket Number** (**Figure 5-2, B**) exactly as it appears in the court records.

Click the **Search** button (**Figure 5-2, C**) to search eFileManager for the case.

If the case is found in eFileManager (an integrated case - **Section III, A**) your will be returned to the **Case Information** page (**Figure 5-1**) with most of the information pre-populated for the case.

If the case is not found (a non-integrated case - **Section III, B**) your will be presented with a **Message from the Web Page** that the case cannot be found. Click the **OK** button.

You are returned to the **Case Information** page (**Figure 5-1**) with none of the case information entered on the page. eFileManager was not able to obtain the existing case information from the jurisdiction so you will need to manually enter it.

3. **Returned for Correction Filing**

Select **Returned for Correction Filing** (**Figure 5-1, F**) option when the clerk has returned a previous filing for correction. Using this option preserves the submission date of the original submission.

B. Enter Any Missing Data

- **Jurisdiction (Figure 5-1, G**) - Be sure to select the correct jurisdiction. Many filings are rejected because the filer selected Harris County Court instead of Harris District Court, for instance.
- **Case Category (Figure 5-1, H)** - These options are provided by the clerk of court.
- **Case Type (Figure 5-1, I)** - These options are provided by the clerk of court.
- **Client ID (Figure 5-1, J)** - This field is mandatory only if your firm eFiling Administrator has made it so in the **Firm Admin** > **Firm Info** section. A Client ID for each submission is particularly helpful to have at billing time.
- **Payment Account (Figure 5-1, K**) - Select the firm payment account for this case. If no payment accounts display, ask a firm eFiling manager to enter one in the Payment Accounts section of the Admin Area.
- **Filer Type (Figure 5-1, L)** - This field displays only for a few jurisdictions such as Harris and Tarrant District courts. Choose your filer type from these options: Attorney, Government Filer, Non-Party Filer, or Pro Se Filer.
- **Attorney of Record (Figure 5-1, M)** - Select the attorney of record for this case from the drop-down selector. If an attorney does not display, your firm eFiling administrator must add the

attorney the Attorneys section of the Admin area.

- **Damage Amount (Figure 5-1, N)** - Make the appropriate choice for all but Family Law cases.
- **Procedure/Remedy (Figure 5-1, O)** - Make the appropriate selection.

C. Case Parties

Next enter the case parties by clicking the Add Case Party button (Figure 5-1, P). Notice that we provide you the required Party Types (Figure 5-1, Q). Noting this in advance enable you to enter your case parties and select the Party Types more quickly.

The Add Case Party window (Figure 5-3) opens. Enter the appropriate party information.

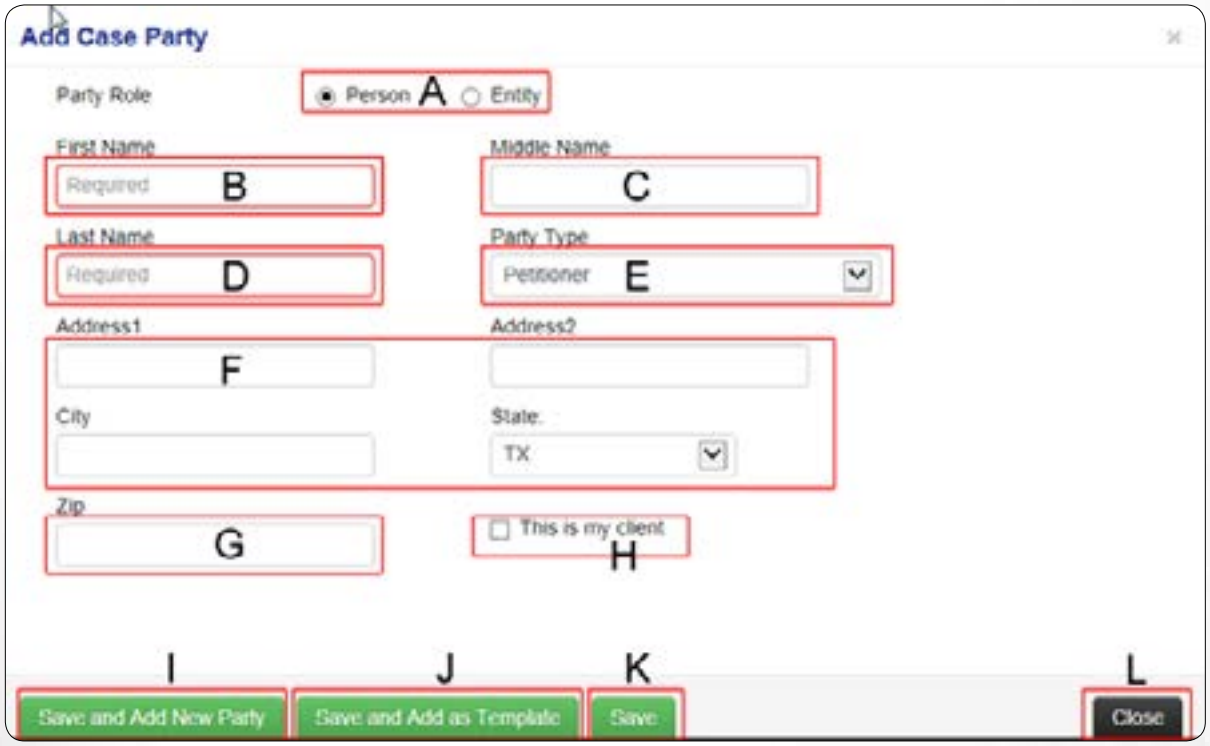


Figure 5-3, Add Case Party Information

- **Party Role (Figure 5-3, A)** - Select whether the party you are entering now is a person or an entity such as a corporation, partnership, governmental agency, etc. If you select **Entity**, all the following Name fields will be replaced by an **Entity Name** field.
- **First Name (Figure 5-3, B)** - Enter the person's First Name - Required.
- **Middle Name (Figure 5-3, C)** - Enter the person's Middle Name.
- **Last Name (Figure 5-3, D)** - Enter the person's Last Name - Required.
- **Party Type (Figure 5-3, E)** - You must enter enough Case Parties to assign at least one to each of the required Party Types. You may add as many Party Types as required in addition to the required party types.
- **Address Fields (Figure 5-3, F)** - You must provide a complete address if you add any address information. While not yet universally required by jurisdictions, many are requiring addresses for the Respondent/Defendant, especially if you will request service of citation. Adding the address information helps prevent your filings from being returned for correction by the clerk.
- **Zip Code (Figure 5-3, G)** - Enter the zip code for the party.
- **This is my client (Figure 5-3, H)** - Check this box when the party you are entering is your

client.

- **Save and add new party (Figure 5-3, I)** - Click this button to save the data on a recently added party and to add another party to the case.
- **Save and Add as Template (Figure 5-3, J)** - Click this button if you want to add this party information as a case party template to save time when entering this case party information for future filings. See **Case Party Templates** in **Chapter 13** for more information about this feature in FileTime.
- **Save (Figure 5-3, K)** - Click this button to save the recently added party and to leave this page.
- **Close (Figure 5-3. I)** - Click this button to leave this page without saving any entered data.

If you, or someone in your firm has saved **Case Party Templates**, FileTime will present to you the Case Party template option after you enter the first few letters of the person's/entity's name. See **Case Party Templates** in **Chapter 13** for more information about this feature in FileTime.

You return to the completed **Case Information** page (**Figure 5-4**), with the Case Parties information displayed.

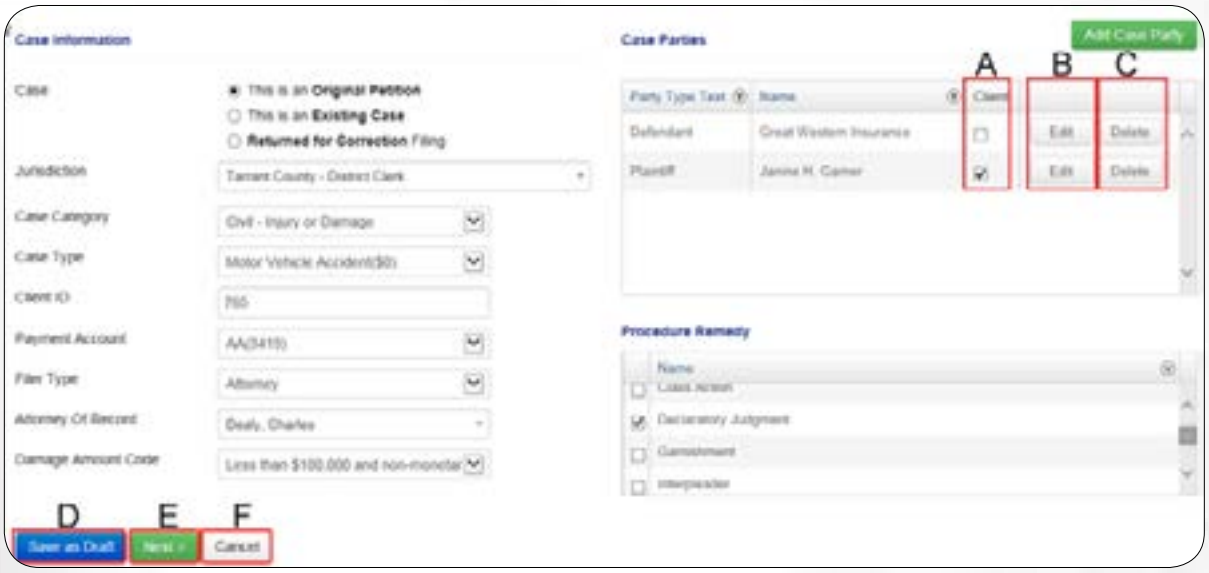


Figure 5-4, Completed Case Information Page

- Be sure that the party or parties that your firm represents is selected (**Figure 5-4, A**).
- Click the **Edit** button (**Figure 5-4, B**) to change the party name or the **Party Type**.
- Click the **Delete** button (**Figure 5-4, C**) to remove a case party. You cannot change any party information after the submission so make sure that it is correct.

Click the **Save as Draft** button (**Figure 5-4, D**) at any point while adding data to this page. Doing so will save your completed work as a draft that you return to later to complete.

Click the **Next** button (**Figure 5-4, E**) to continue to the next page.

Click the **Cancel** button (**Figure 5-4, F**) to cancel this filing completely and save nothing.

Chapter 6

XIV. The eFiling Process - Add Filing(s)

On this page you will upload your filing, or filings if you intend to submit multiple filings with the submission, and request court services. Here is a view of the blank page.

The **Filing Navigator** (**Figure 6-1, A**) indicates that you are on the **Upload Documents** page.

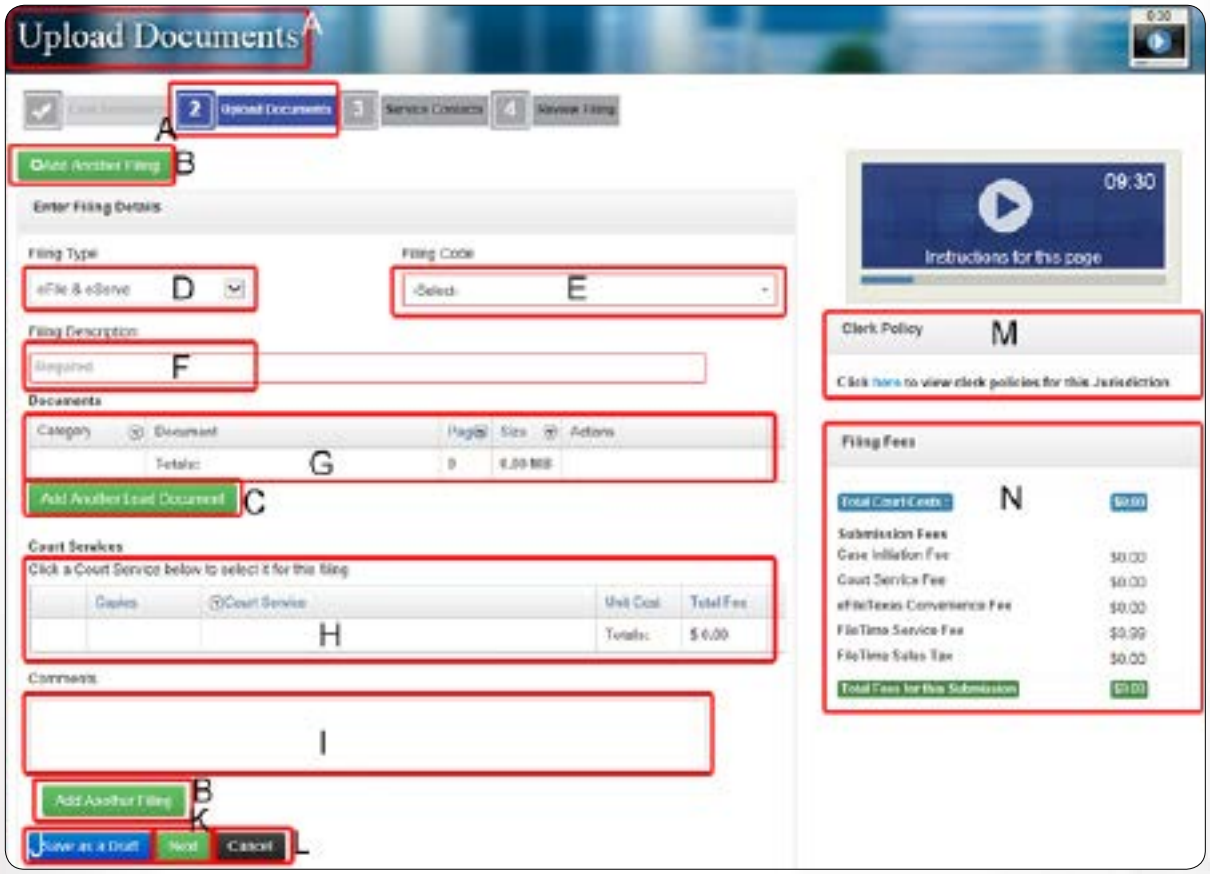


Figure 6-1, The Upload Documents Page

A. Overview of this Page

- **Add Another Filing (Figure 6-1, B) -** Click one of these two buttons to start an additional filing for the submission. Use this option only when the jurisdiction into which you are filing requires that additional document you are submitting must be filed a lead document in a separate filing from the first document you upload. You will find clerk instruction about them when you click the **Clerk Policies** link (**Figure 6-1, L**).
- **Add Another Lead Document (Figure 6-1, C)** - This button serves the same purpose as the **Add Another Filing** button.
- **Filing Type (Figure 6-2, A**) - Select **eFile&Serve** if you want to file court documents. With this choice you will also have the option to electronically serve (eServe) your documents on other case parties.

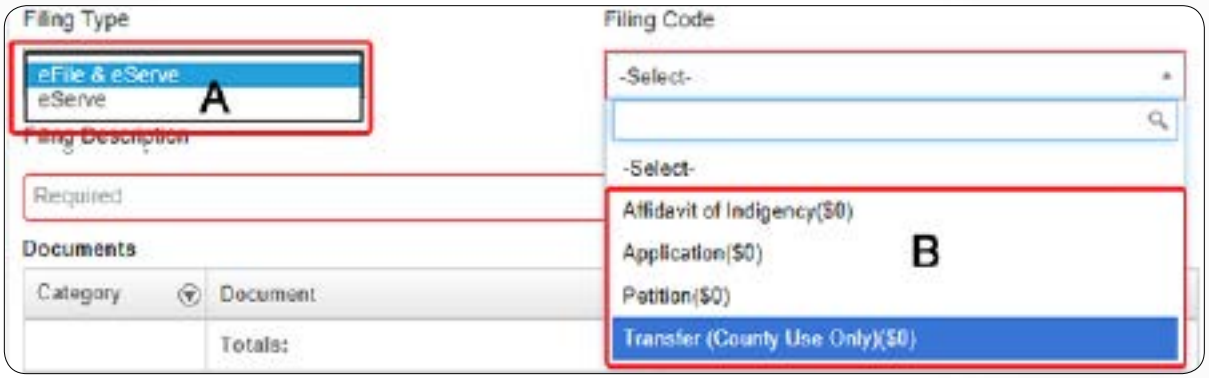


Figure 6-2, Filing Type and File Code Options

Select **eServe** if you only want to electronically serve documents (**Discovery**, for instance) on opposing counsel without a court filing.

- **Filing Code (Figure 6-1, E**) - Filing Code options are standardized across the eFileManager system. Choose carefully as your filing will be rejected should you select the incorrect Filing Code. Select the **Filing Code** (**Figure 6-2, B**) only for the lead document for each filing.
- **Filing Description** (**Figure 6-1, F**) - The **Filing Code** defaults into this field to save you time. However, you can add additional language. If you enter your additional language before selecting the filing code, the Filing Code will be appended to the front of any additional language you add to this field.
- **Document** (**Figure 6-1, G**) - You will upload your document(s) for each filing in this area. FileTime will display the number of pages in each document as well as the file size of each document. Additionally, FileTime will display to total page count and document size for the filing.
- **Court Services** (**Figure 6-1, H**) - From this section, for most jurisdictions you will select for citations, copies, writs, jury fee, service by the constable or sheriff, etc.
- **Comments (Figure 6-1, I**) - Provide comments here to the clerk such as address information for serving a Registered agent, the name of the process server, etc.
- **Save as Draft (Figure 6-1, J)** - If you are interrupted during the eFiling process, click this button to save your work. Return later and resume the filing from the **Drafts** section.
- **Next (Figure 6-1, K)** - When you have completed this page, click this button to proceed to the eService page, next section.
- **Cancel (Figure 6-1, L)** - Click this button to abandon this submission and save nothing.
- **Clerk Policies (Figure 6-1, M)** - Click this button to view information about the clerk policies for the jurisdiction into which you are submitting.
- **Filing Fees** (**Figure 6-1, N**) - The Filing Fees will dynamically update as your add court-charge document types and court services.

B. Uploading the Lead Document for a Filing

Mid-page is the **Documents** area (**Figure 6-3**).

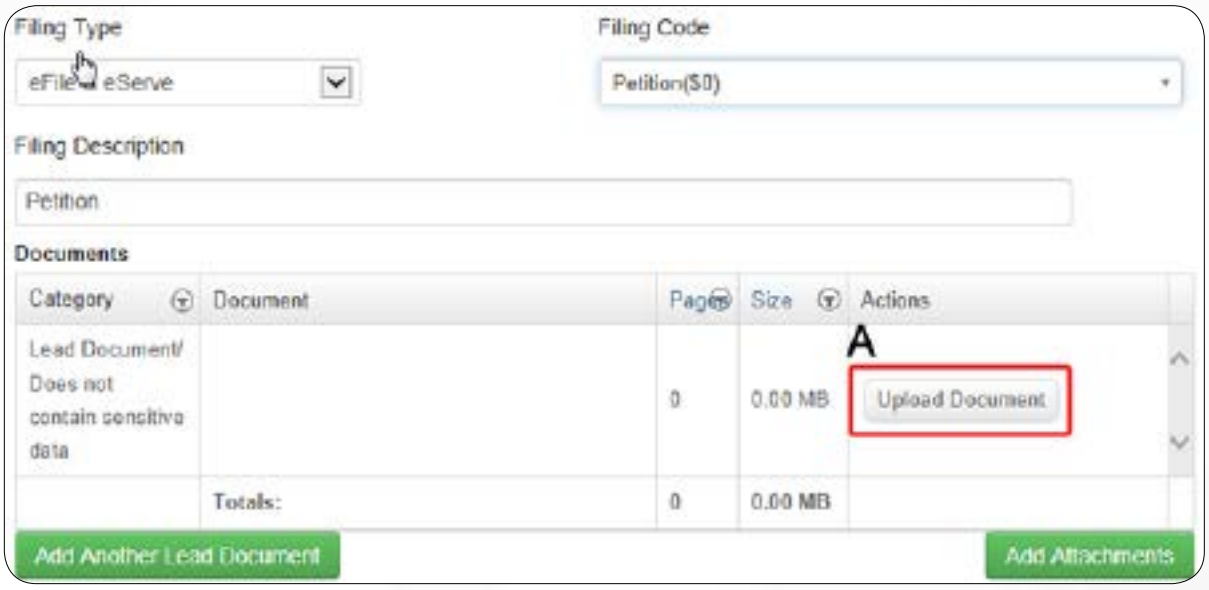


Figure 6-3, Document Upload Section

ALWAYS upload your lead document first. As a general rule that is the document you are filing with the court and it usually receives a file stamp.

Each jurisdiction has its own unique rules about the uploaded documents. Click the **Clerk Policies** link (**Figure 6-1, M**) for guidelines. We highly recommend that you read the Clerk Policies for the jurisdiction before uploading your documents.

If you use our free fee plan you can upload only PDF files.

If you select one of our paid fee plans you can upload a wide variety of file types including: tif, jpeg, doc, docx (Microsoft Word, and PDF. FileTime converts Microsoft Word docs to text-searchable PDF files for you.

Click the **Upload Document** button (**Figure 6-3, A)**.

The **Add Documents** window opens (**Figure 6-4**).

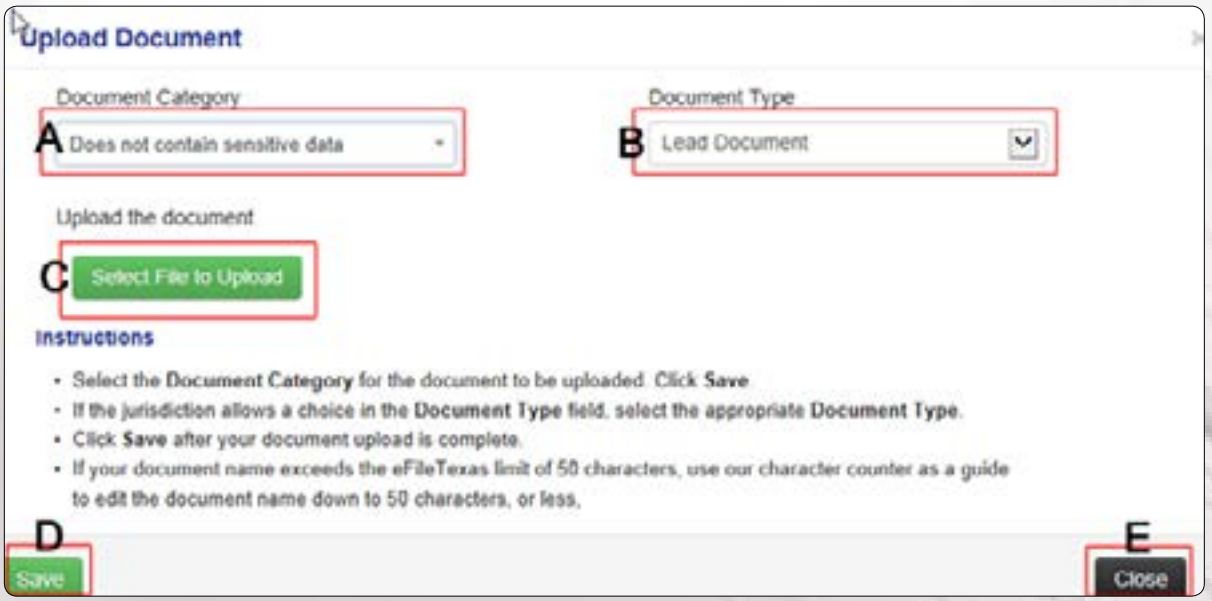


Figure 6-4, Upload Document Window

1. **File into any jurisdiction**

a. The five important sections of this page are:

- **Document Category** (**Figure 6-4, A**) - Select the correct security option for this filing.
- **Document Type** (**Figure 6-4, B**) - This will default to **Lead Document** when you are uploading your lead document and you cannot change this selection. It will default to Attachment when you are uploading an attachment after uploading your lead document.
- **Select File to Upload** (**Figure 6-4, C**) - After clicking this button you will navigate to your lead document, wherever it is saved.
- **Save** (**Figure 6-4, D**) - After uploading the current document, click **Save** to return to the **Add Filings** page.
- **Close** (**Figure 6-4 E**) - Click this button to close the **Add Document** window and not have the uploaded document.

b. Make certain that you have the correct **Document Category** (**Figure 6-4, A**).

c. Click the **Select File to Upload** button (**Figure 6-4, C**).
You are taken to the file navigator for your computer. You will need to know where in your system the document is stored.

d. In a Windows operating system the file explorer looks similar to **Figure 6-5**.

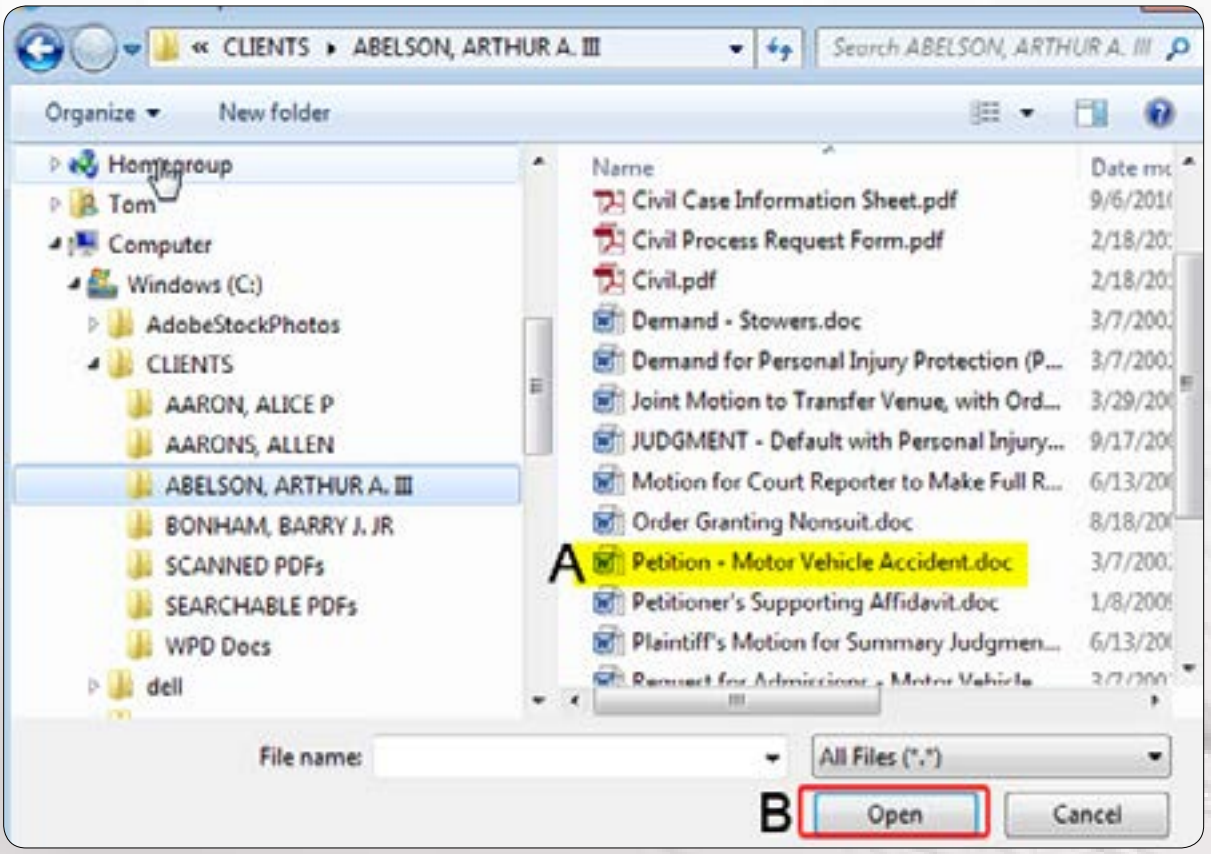


Figure 6-5, Windows File Explorer

e. When you find the file (**Figure 6-5, A**) you may:

Double-click on the file name or

Click it once and click the **Open** button (**Figure 6-5, B**).

f. You will see activity as the document is sent to our server and, if applicable, converted to a PDF file.

g. When this process completes you will see **Done** (**Figure 6-6, A**).

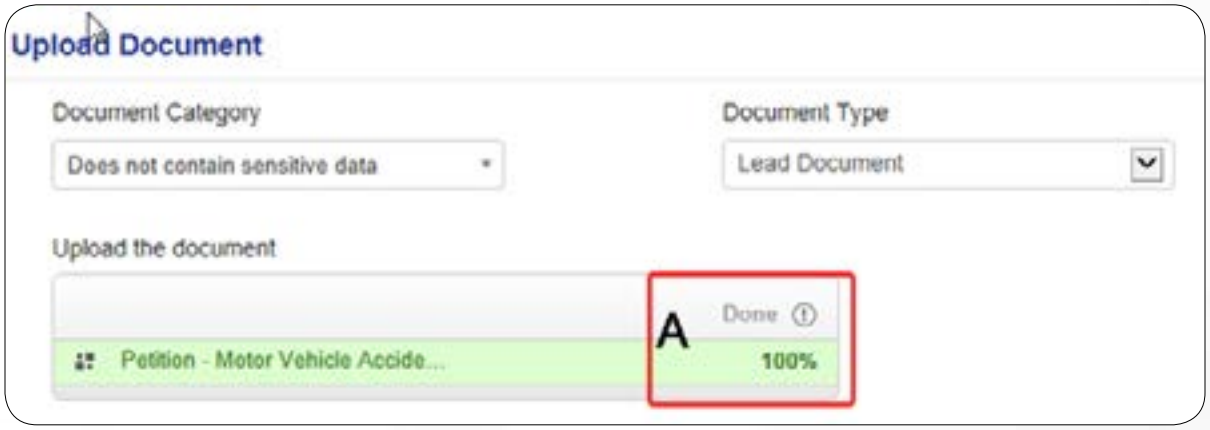


Figure 6-6, Document Upload Completed

h. Click **Save** (**Figure 6-4, D**) to return to the **Upload Document** page (**6-1**).

In the **Documents** section of the **Upload Document** page (**Figure 6-7**) you can:

Figure 6-7, Uploaded Document Information

Click on the document name to open and view the document (Figure 6-7, A)

Click the **Edit** (**Figure 6-7, B**) button to rename the document or change the Document Category.

Click the **Delete** (**Figure 6-7, B**) button to delete the document and upload a different one.

You can also:

Click the **Add Another Lead Document** button (**Figure 6-7, D**) to start a new filing for an additional lead document for the submission or

Click the **Add Attachments** button (**Figure 6-7, E**) to upload additional documents as attachments to the already uploaded lead document.

2. File into Harris County District Court

The differences between Harris District and other jurisdictions begins on the **Add Filing**s page. You will find that the **Filing Code** options **(Figure 6-8**) look very different in Harris District than they do in any other jurisdiction. Select the appropriate choice under **Filing Code**.

Figure 6-8, Select Filing Code for Harris District

Copy the steps from the above to get to the **Upload Document** page (**Figure 6-9**).

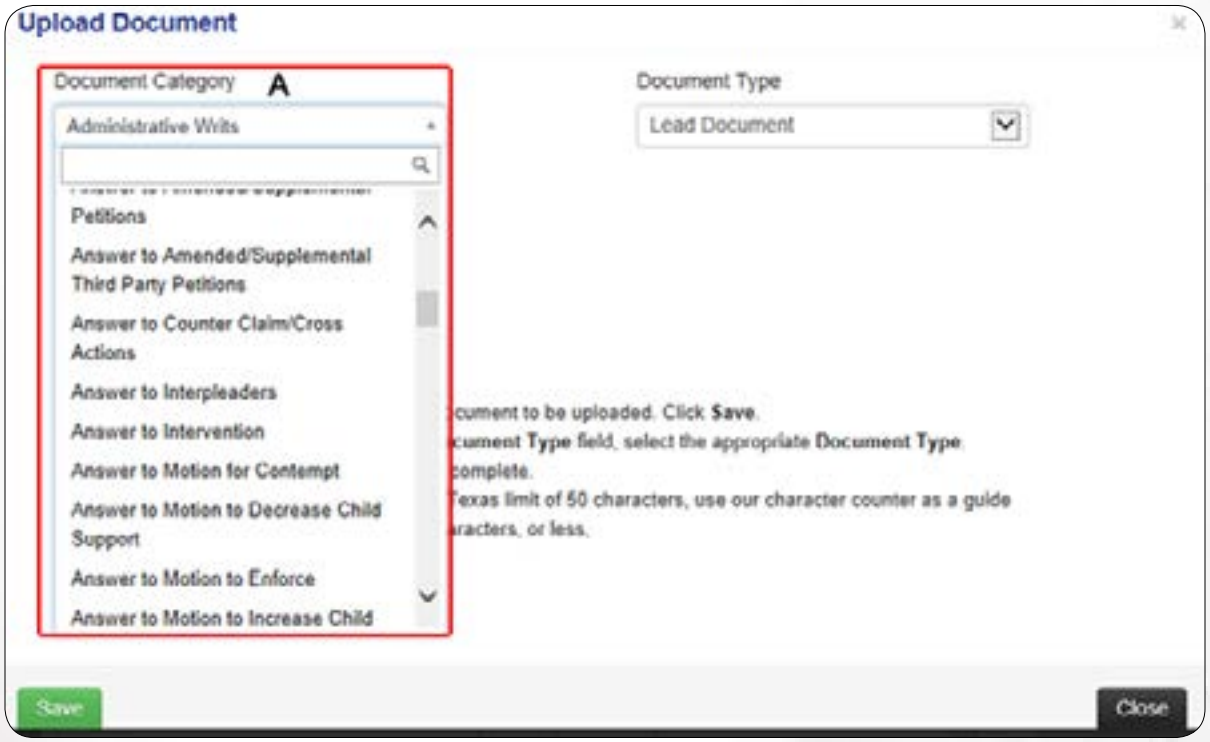


Figure 6-9, Harris District Court Document Category

The **Document Category** field (**Figure 6-9, A**) functions more like the Filing Code in the other jurisdictions.

You will need to select the correct **Document Category** for each document you upload.

Each jurisdiction will display different Document Categories.

C. Uploading Attachments to the Lead Document

After uploading the lead document, you can then upload any attachments to the lead document. Be aware that some jurisdictions do not allow attachments - each document must be uploaded as a lead document in a separate filing.

The lead document now displays on the grid (**Figure 6-10, A**).

Figure 6-10, Lead Document Uploaded

Click the **Add Another Document** button (**Figure 6-10, B**) to add an attachment to the lead document.

The **Upload Document** window opens again (Figure 6-11).

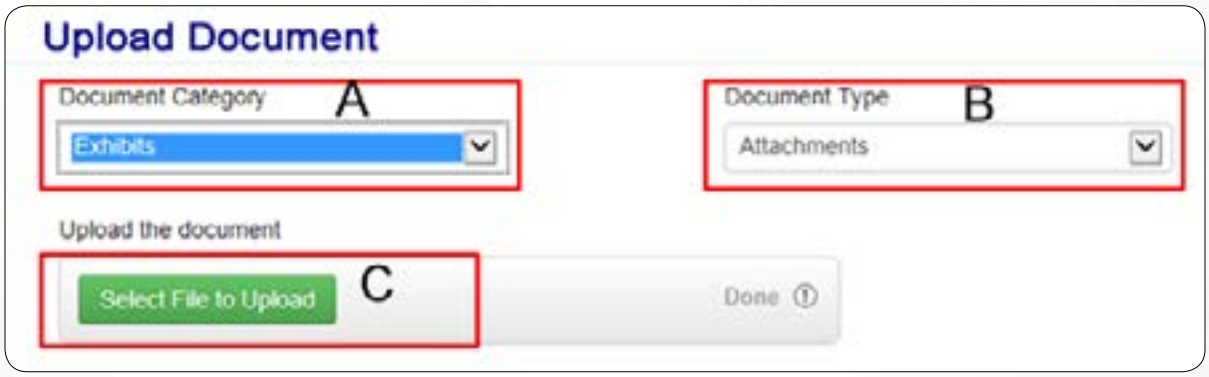


Figure 6-11, Upload Attachments

Select the appropriate **Document Category** (**Figure 6-11, A**). Remember that in non-Harris County District Court jurisdiction this will be the security type selection.

The **Document Type** defaults to **Attachment** (**Figure 6-11, B**) since this is an attachment to the lead document and you cannot change it.

Click the **Select File to Upload** button (**Figure 6-11, C**), upload the document, and click the **Save** button as before to finish the upload process.

Repeat the above process for each attachment you need to upload.

D. Renaming Your Document

eFileManager limits the characters in a document name to 50 characters. If the name of your document exceeds 50 characters you will receive a warning from FileTime (**Figure 6-12, A**).

The 50 characters allowed includes the .pdf extension at the end of the document name so you really have a maximum of 46 characters for the document name itself.

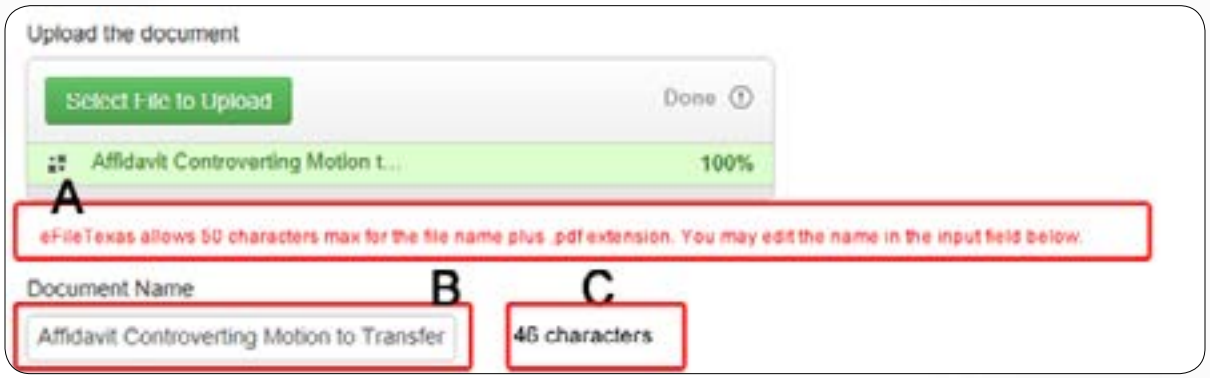


Figure 6-12, Document Name too Long

You can enter a new and shorter name for the document in the **Document Name** field (**Figure 6-12, B**).

The character counter tells you the total number of characters in the document name, including spaces but excluding the .pdf extension. 46 characters, or less is your goal.

Click the **Save** button when completed.

E. Manipulating/Editing/Deleting Your Documents

After uploading your lead document and any attachments, the Documents area may resemble **Figure 6-13**.

There is valuable information as well as useful features in this area:

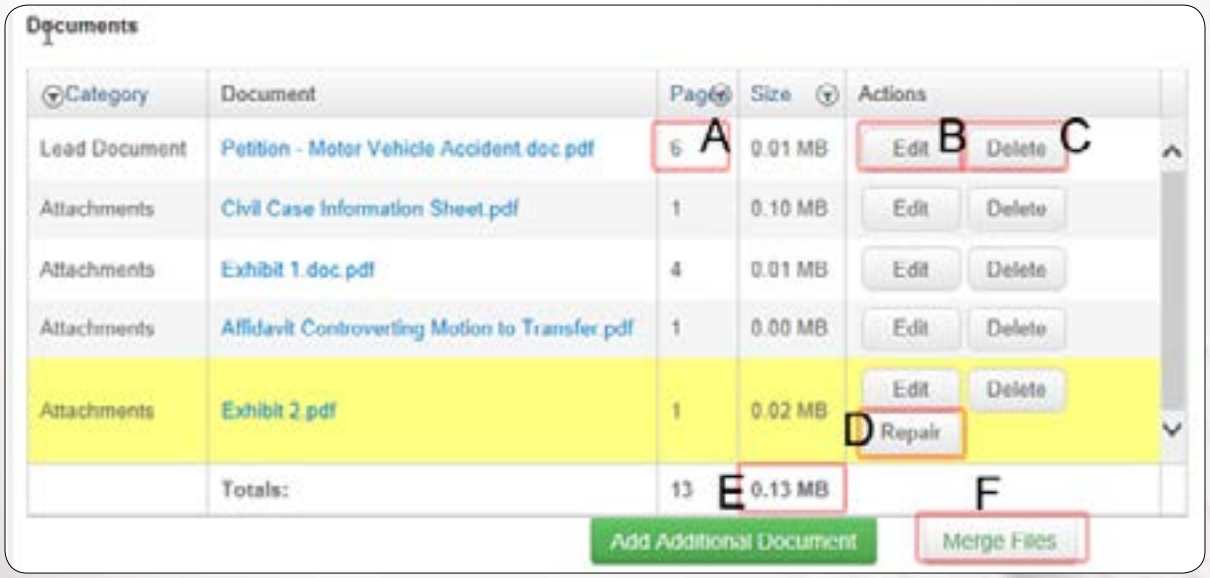


Figure 6-13, Repair Document

Page Count (**Figure 6-13, A**) - FileTime automatically displays a page count for each uploaded document. This is particularly helpful if you need to request copies for the petition for the citation.

Edit button (**Figure 6-13, B**) - Click this button to change the **Document Category** or to upload a document to replace the existing document.

Delete button (**Figure 6-13 C**) - Click this button to delete the existing document. If you delete a lead document you must upload a new lead document. In this case, clicking the **Edit** button for the lead document might be a better choice.

Repair button (**Figure 6-13, D**) - FileTime automatically detects when a document's

physical dimensions are outside the eFiling system standard or 8.5 inches wide by 11 inches wide. The size discrepancies often occur with scanned documents. The clerk can strike any document outside these dimensions and orientation. If you are on a FileTime Fee plan for which you pay for each filing, you will see the Repair button in these instances. Click the **Repair** button to have FileTime resize and/or reorient your document to the state standard.

Total File Size (**Figure 6-13, E**) - eFileManager states that the maximum file size is 35 MBs for all documents in a submission. That size limitation may be met by a single large document or a large number of smaller documents. Our experience is that this maximum is somewhat elastic so you might want to try a submission if your total document size is only a little larger.

Merge Files (Figure 6-13, F) - Click this button to merge all the PDF documents displayed in the documents grid into a single PDF file. Some jurisdictions, for instance require that exhibits be attached to the lead document. Clicking the **Merge Files** button would cause FileTime to merge the uploaded lead document and the attachment(s) for you.

F. Make Your Document Text Searchable

You can upload virtually any file type to FileTime and FileTime will convert it to a text-searchable document for you.

When you upload a document, FileTime checks he document for searchable text in the document.

If the uploaded document is a scanned PDF, or an image file such as a .tiff or .jpg file, it will not find any searchable text. FileTime will then alert you with the yellow background and **Searchable** button (**Figure 6-14, A**). that you see in **Figure 6-14**).

Figure 6-14, Make Text-Searchable button

Click the **Searchable** button and FileTime will run an OCR process that makes the document text-searchable.

Important Notes:

- If FileTime finds any searchable text in the document this alert will not be triggered. So, if you have combined a document containing searchable text with a document that does not contain searchable text, FileTime will accept the document without the Alert being triggered.
- The quality of the searchable text in the document is highly dependent on the quality of the image of the page. If the underlying image is poor you will find that the rendition to searchable text in the document will also be very poor. It is YOUR RESPONSIBILITY to ascertain that the quality of the conversion to searchable text is acceptable.
- You can choose not to have FileTime OCR your document. Just ignore the warning, if you

wish, and continue with the submission process.

G. Add Court Services to Your Filing

The Court Services option displays below the documents grid, Figure 6-15.

The court service options displayed for you vary by:

- Jurisdiction,
- Case Type,
- Case Category,
- Filing Code, and in the case of Harris District,
- Document Category.

FileTime downloads the Court Services options that are provide by the clerk of court via eFileManager.

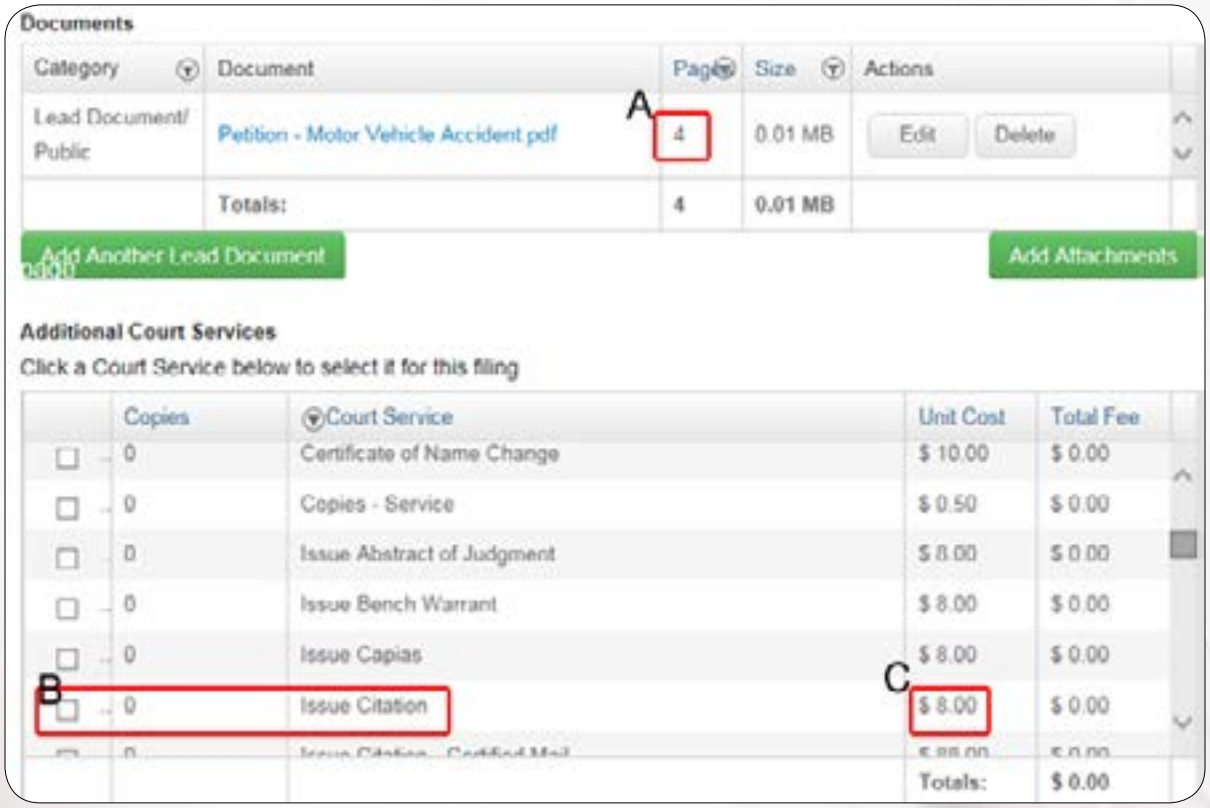


Figure 6-15, Court Services

In this example, we want one citation and a copy of the petition to the citation.

FileTime shows that there are four pages in the petition (**Figure 6-15, A**) so four copies of the petition are needed.

Click the selector box for **Issue Citation** (some counties may list it as **Citation with 1 Copy**), **Figure 6-15, B**. You can see from the **Unit Cost** column (**Figure 6-15, C**) that the cost will be $8.00 per citation.

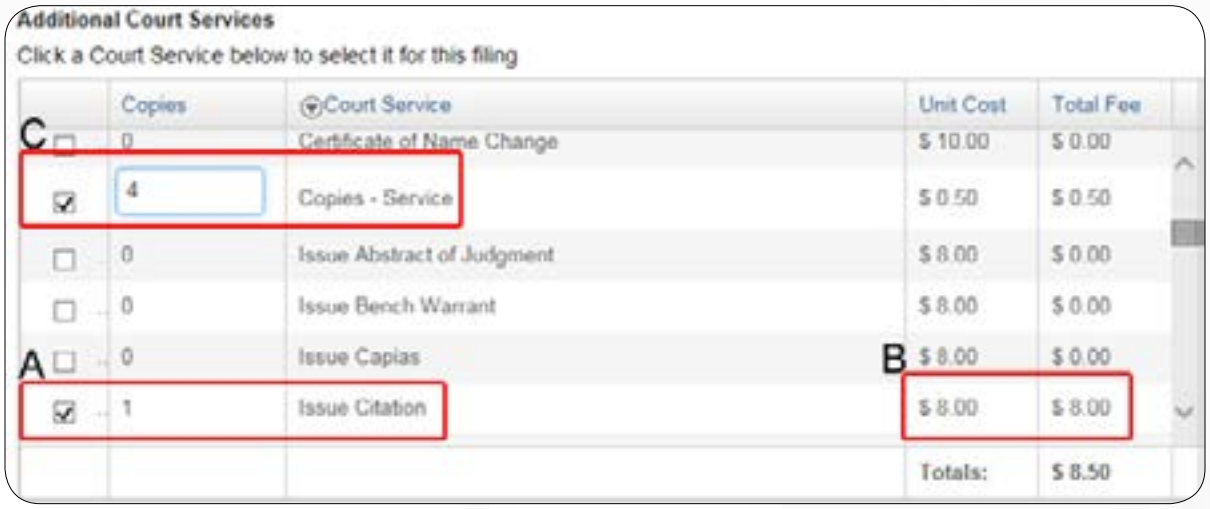


Figure 6-16, Citation Requested and Service Copies being Ordered

After clicking the selector for **Issue Citation** and entering 1 as the number needed (**Figure 6-16, A**), FileTime calculates the fee for this service (**Figure 6-16, B**).

Next, click the selector for **Copies - Service** (**Figure 6-16, B**). A field opens in the copies column in which to enter the number of copies needed - 4 (**Figure 6-16, C**).

After requesting all the court services required your Court Services grid may resemble **Figure 6-17**.

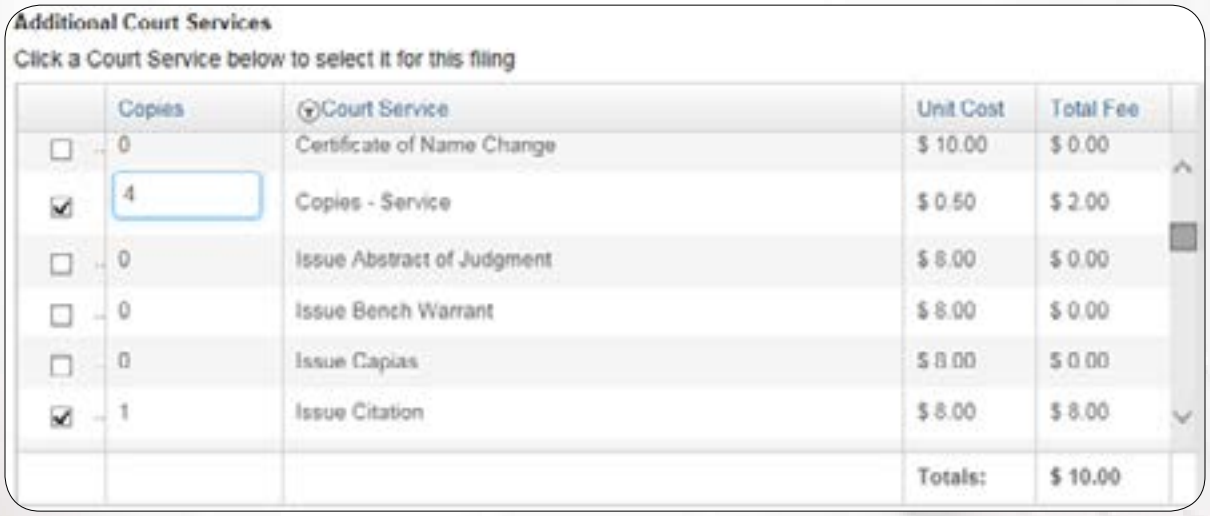


Figure 6-17, Citation and Service Copies Ordered

Each of the requested services is checked, with the **Unit Costs** and **Total Fee** displayed.

Some of the requested items may be above or below the scroll line, and will be evidenced by the **Total** for all selected Court Services**.**

Some jurisdictions require that all documents in a submission be uploaded as lead documents in separate filings.

A tipoff to this requirement that no fees will be displayed in the Fees area after you select Petition as your **Filing Code**. In those jurisdictions you will need to make the appropriate selection in the **Court Services** area (**Figure 6-18**).

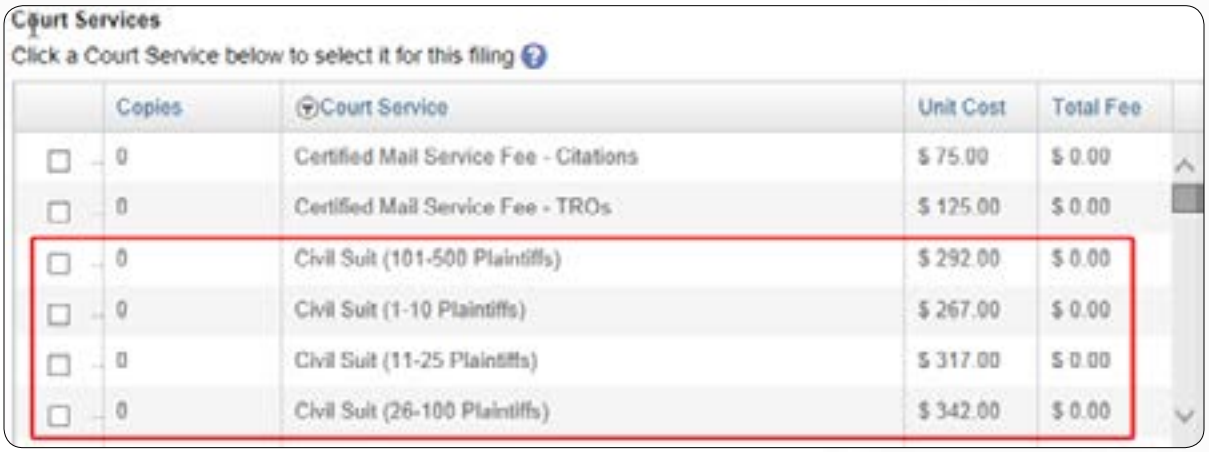


Figure 6-18, Paying the Case Initiation Fee

H. Add Another Filing to the Submission

After adding your initial filing to the submission, you will often need to add additional filings.

As a general rule, if a document needs a file stamp, it just be filed as a lead document, which requires a separate filing.

Again, each jurisdiction has its own rules about which documents can be filed as attachments and which ones must be filed as lead documents. Watch for a line to any jurisdiction-specific information we have available for you.

To add another filing to the submission click the green **Add Another Filing** button located at the top and the bottom of the page.

You will add the new filing using the steps in Sections A - F.

When you are finished with all your filings they will display at the top of the page like **Figure 6-19** or **Figure 6-20**.

Figure 6-19 shows each filing, each with its own unique Filing code, as required by some jurisdictions.

Figure 6-19, Multiple Filings for the Submission, Different Filing Codes for Each Filing

Figure 6-20 shows each filing with a different Filing code, as required by the remaining jurisdictions.

Figure 6-20, Multiple Filings in the Submission, Same Filing Code

Each filing in the submission is displayed on a separate row (**Figure 6-20, A)**.

Click the **Delete** icon to delete that filing (**Figure 6-20, B)**.

The total size of all the documents in all of the filings is displayed (**Figure 16-20, C)**. The maximum allowed by eFileManager is 35 MBs. If the document total size exceeds 35 MBs, FileTime will not allow you to proceed. You will find instructions **here** on what to do if you experience this issue.

I. Add Comments to the Clerk

Add **Comments** to the clerk (**Figure 6-21, A**) about such things as: hold for [process server], address information for the registered agent, a missing filing code or court service, etc. Check that the clerk would like to receive information this way.

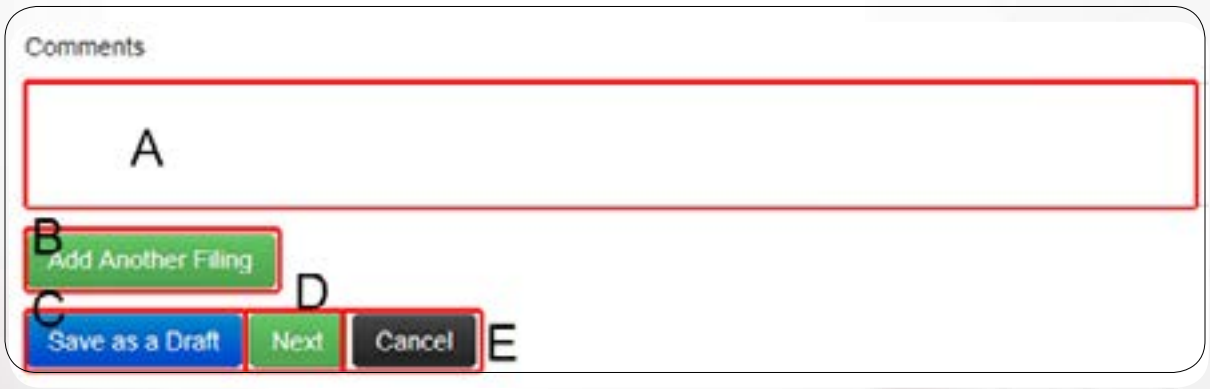


Figure 6-21, Add Comments to the Clerk of Court and Finish the Page

The **Add Another Filing** button (**Figure 6-21, B**) is the lower button for this purpose. Click it to start another filing for this submission.

Click the **Save as Draft** (**Figure 6-21, C**) button when you are interrupted during an eFiling session and cannot complete the filing you can click **Save as Draft**. All your work to this point is saved. When you later return to your eFiling, session. Click **Drafts**, locate this draft, and click the **Resume** button.

Click the **Next** button (**Figure 6-21, D**) to progress to the next step, **Service Contacts and Recipients**.

Click the **Cancel** button (**Figure 6-21, E**) to cancel the submission and not save any of the data you have entered.

Chapter 7

XIV. The eFiling Process - Service Contacts and Recipients

For more detailed information about eService, see our eService Guide.

The Service Contacts page displays (**Figure 7-1, A)**. When submitting an original petition, all the areas (**Figure 7-1, B through E**) will be blank.

There is no additional fee charged for submitting electronic service (eService) to case parties. There are also no fees charged for receiving eService.

Figure 7-1, Service Contacts Page

A. Service Contacts

The **Firm Service Contacts** section (**Figure 7-1, B**) displays the eService recipients from your firm for this case. You may provide as many firm service contacts as desired. Each of your firm service contacts will receive an eService when counsel eServes in this case.

We HIGHLY recommend that your eFiling Firm Administrator sets up **Administrative Copies** of eService emails to additional email addresses. This will ensure that the notification emails go an additional email address within your firm.

To add **Firm Service Contacts** click the **Add Service Contacts** button (**Figure 7-1, Ba**) in this section. The **Attach Firm Service Contacts to this case** window opens (**Figure 7-2**).

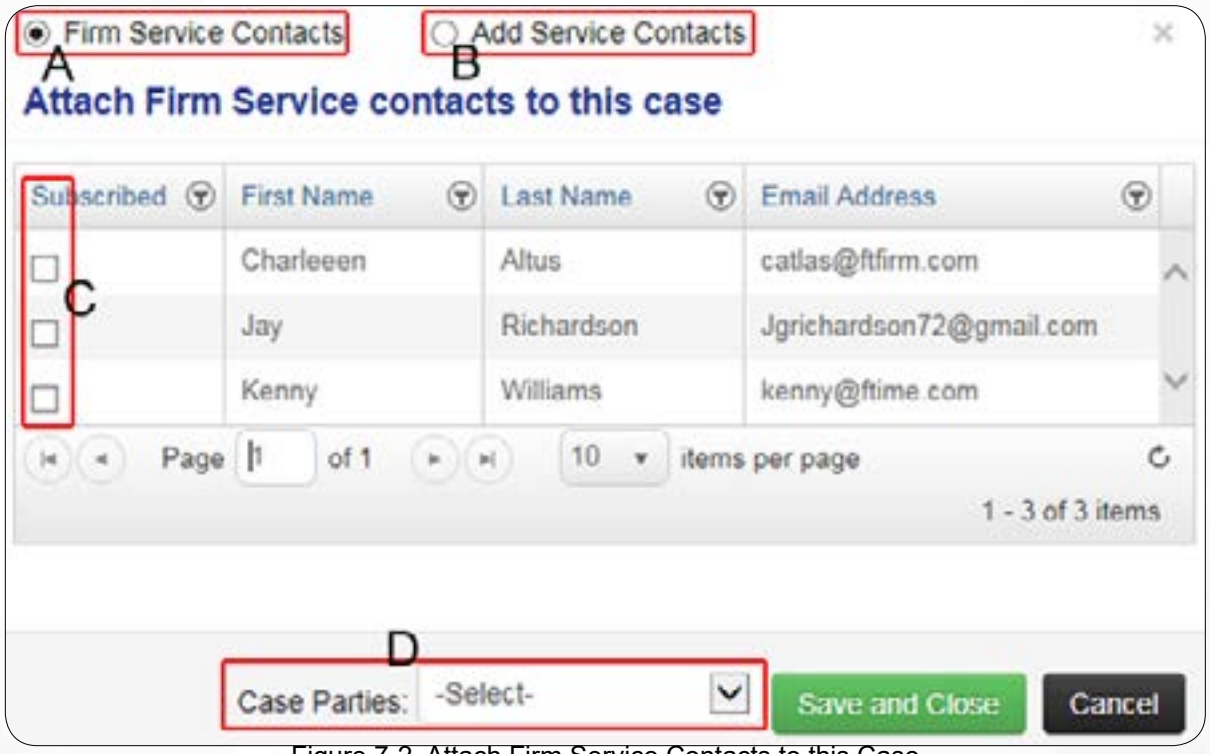


Figure 7-2, Attach Firm Service Contacts to this Case

By default, FileTime displays all **Firm Service Contacts** (**Figure 7-2, A**) that have been added to your firm's Master Service Contacts list. Select the desired Firm Service Contacts by clicking the check box for the desired name (**Figure 7-2, C**).

Be sure to select the **Case Party** for that Service Contact (Figure 7-2, D).

If a staff member does not display and you wish to add that person to the **Service Contacts** list, click that **Add Service Contacts** option (**Figure 7-2, B**).

The **Add Service Contact** page opens (**Figure 7-3**).

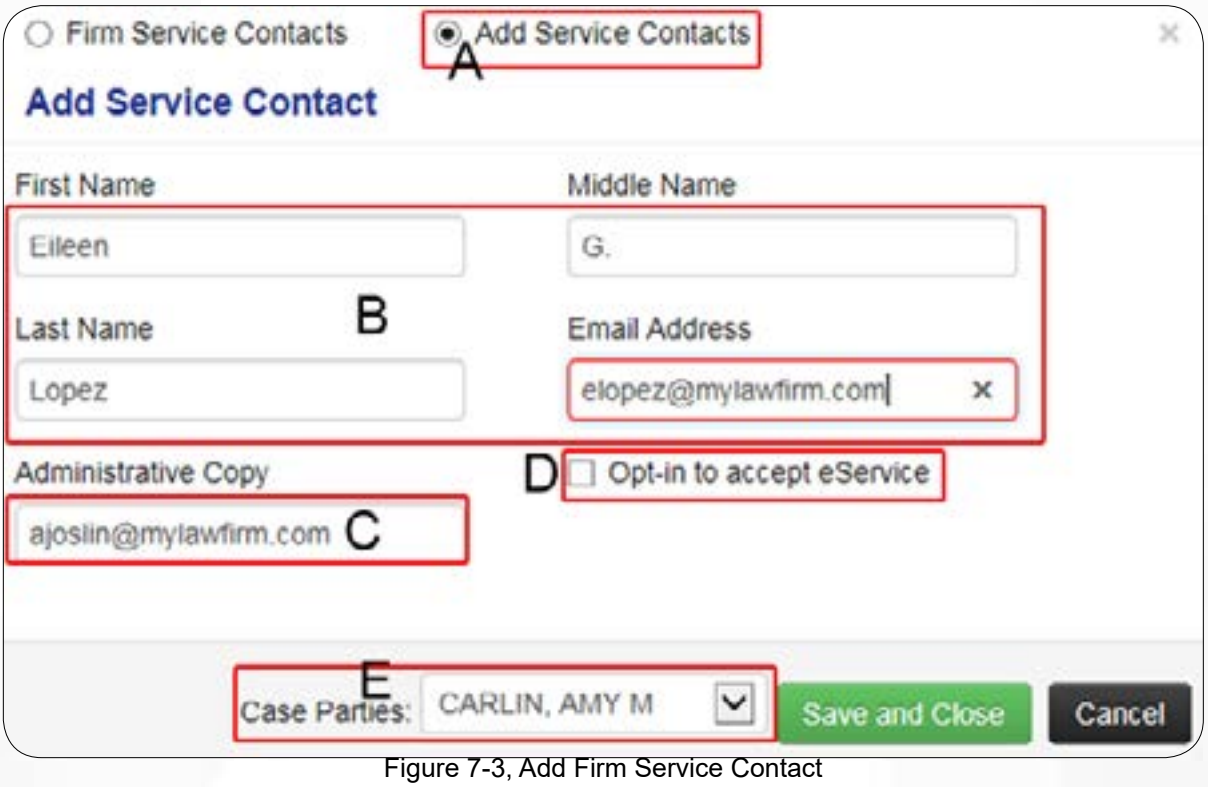


Figure 7-3, Add Firm Service Contact

Enter the person's name (**Figure 7-3, B**) and email address (**Figure 7-3, B**).

To assign an **Administrative Copy** of any eService Notification emails sent to this eService Contact, enter an email address (**Figure 7-3, C**) to which the Administrative Copy should be sent.

To add this person to the eFileManager Public Service Contacts list, click the **Make this service contact public** option (**Figure 7-3, D**). It is particularly important to add firm attorneys to the eFileManager Public Service Contacts List (PSCL) to comply with the requirement to participate in the eService system in counties where eFiling is mandated. Each state will have their own Public Service List. Note: not all states are live with a Public Service List.

Click the **Save and Close** button when done.

B. eService Recipients

Service Recipients (**Figure 7-1, C**) are the service contacts provided by counsel or recipients you add from the Public Service Contacts List (PSCL). All of the eService Recipients on the eService Recipients list will be eServed when click the **Submit** button on the next page, unless you de-select them for eService.

Any Service Recipients whose names are checked will be eServed with this submission. If you have added multiple filings to the submission, all of the checked eService Recipients will receive all of the documents attached to each filing of the submission.

Click the **Add Public Service Contact** button in the **eService Recipients** section (**Figure 7-1, C**).

The **Attach Public Service Contacts to this case** window opens, **Figure 7-4**.

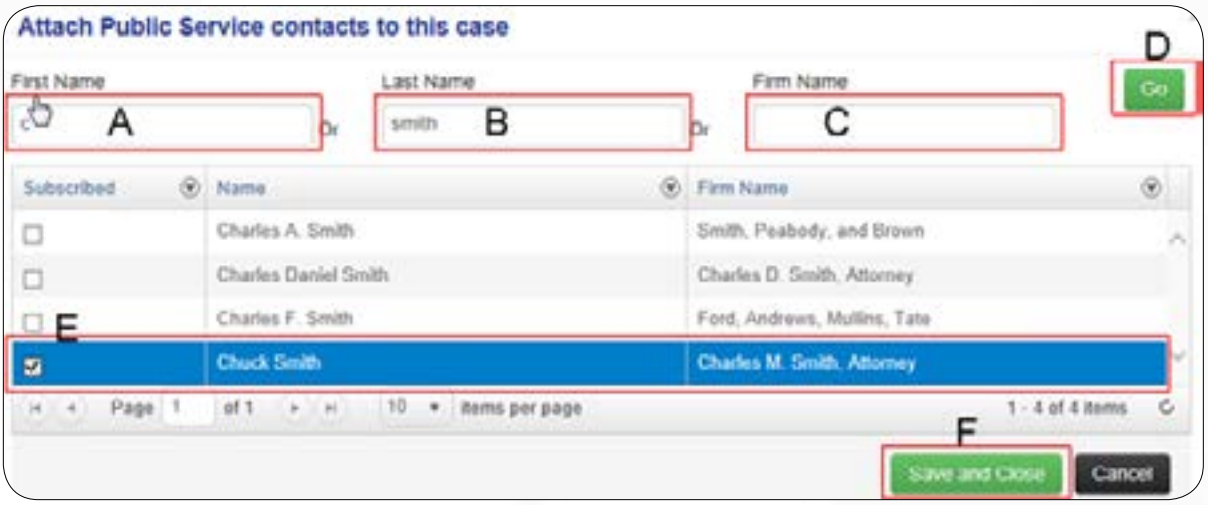


Figure 7-4 Search eFileTexas Public Service Contact List

You can search the eFileManager Public Service Contacts list by **First Name** (**Figure 7-4, A**), and/or by **Last Name** (**Figure 7-4, B**), and/or by **Firm Name** (**Figure 7-4, C**).

Click the **Go** button (**Figure 7-4, D**) to start your search.

Click the **Subscribed** check box (**Figure 7-4, E**) for a name to add that attorney to your eService Recipients list.

If a name you are searching for does not display, try again with fewer search parameters (**Figure 7-4, A - C**). If the name you seek still does not display, that attorney probably has not been added to the Public Service Contact list.

Click the **Save and Close** button (**Figure 7-4, F**) when done.

C. Attach Non-Firm Public Service Contacts to the Case

If counsel, or the pro se filer, is not on the PSCL, and if you have counsel's email address the next steps are:

Click the **Add Non-Firm Service Contacts** button (**Figure 1, Ca**).

The **Add Non-Firm Service Contact** window opens (**Figure 7-5, A**).

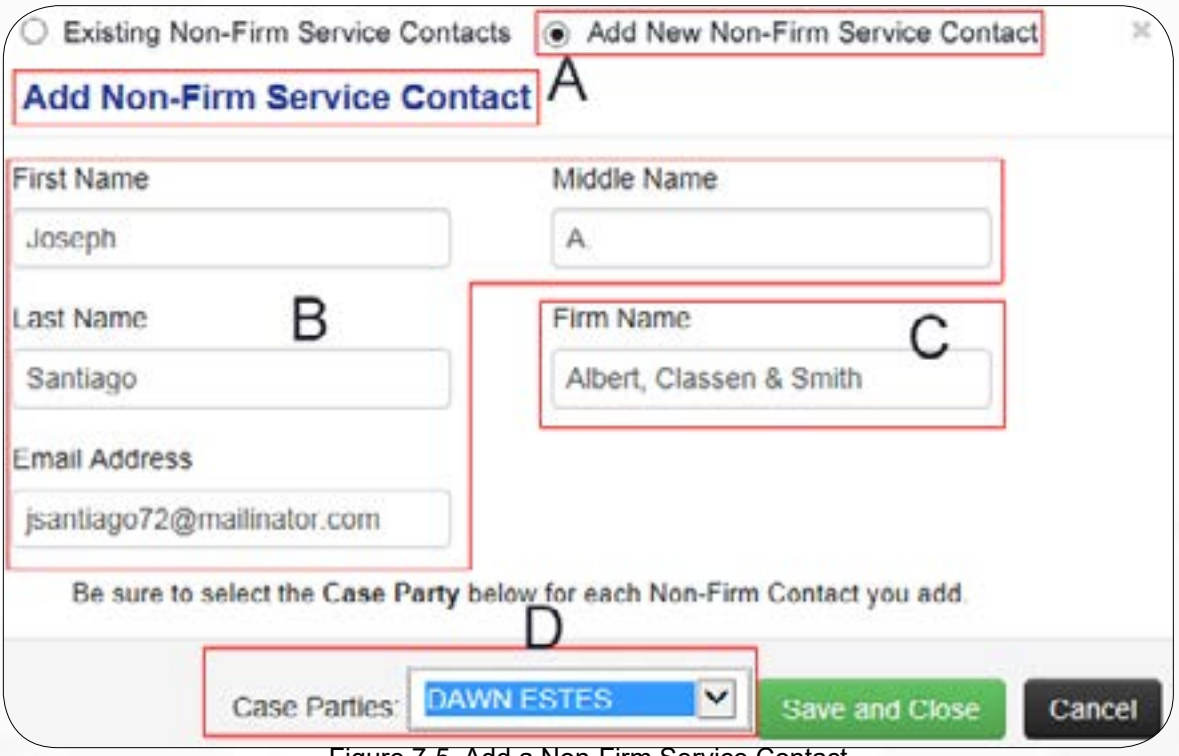


Figure 7-5, Add a Non-Firm Service Contact

Enter the name and email address of the counsel (**Figure 7-5, B**).

Enter counsel's firm name (**Figure 7-5, C**),

Select the case party represented by counsel (**7-5, D**).

Click the **Save and Close** button and be returned to the Service Contacts page.

D. Fax Service

FileTime provides free fax service for your use when counsel cannot be added to your eService Recipients list. This free service is only available to you for paid eFilings. It is not available to filers using our Basic Fee plan, in which no fee charged for submissions.

We provide a total of 100 pages of free eService for the Gold plan ($1.99 per submission and the number of pages is unlimited under the Platinum Fee Plan, $3.99 per submission.

To add a Fax Service recipient, click the **Add Fax Service** button in the Fax Service Section (**Figure 7-1, D**).

E. Add Carbon-Copy

Anyone added to this list will receive a copy of the Submission Review page. Click the **Add New Carbon-copy** button (**Figure 7-1, E**) in the **Add Carbon-copy** section to add recipients.

When this page is complete it might resemble Figure 7-6.

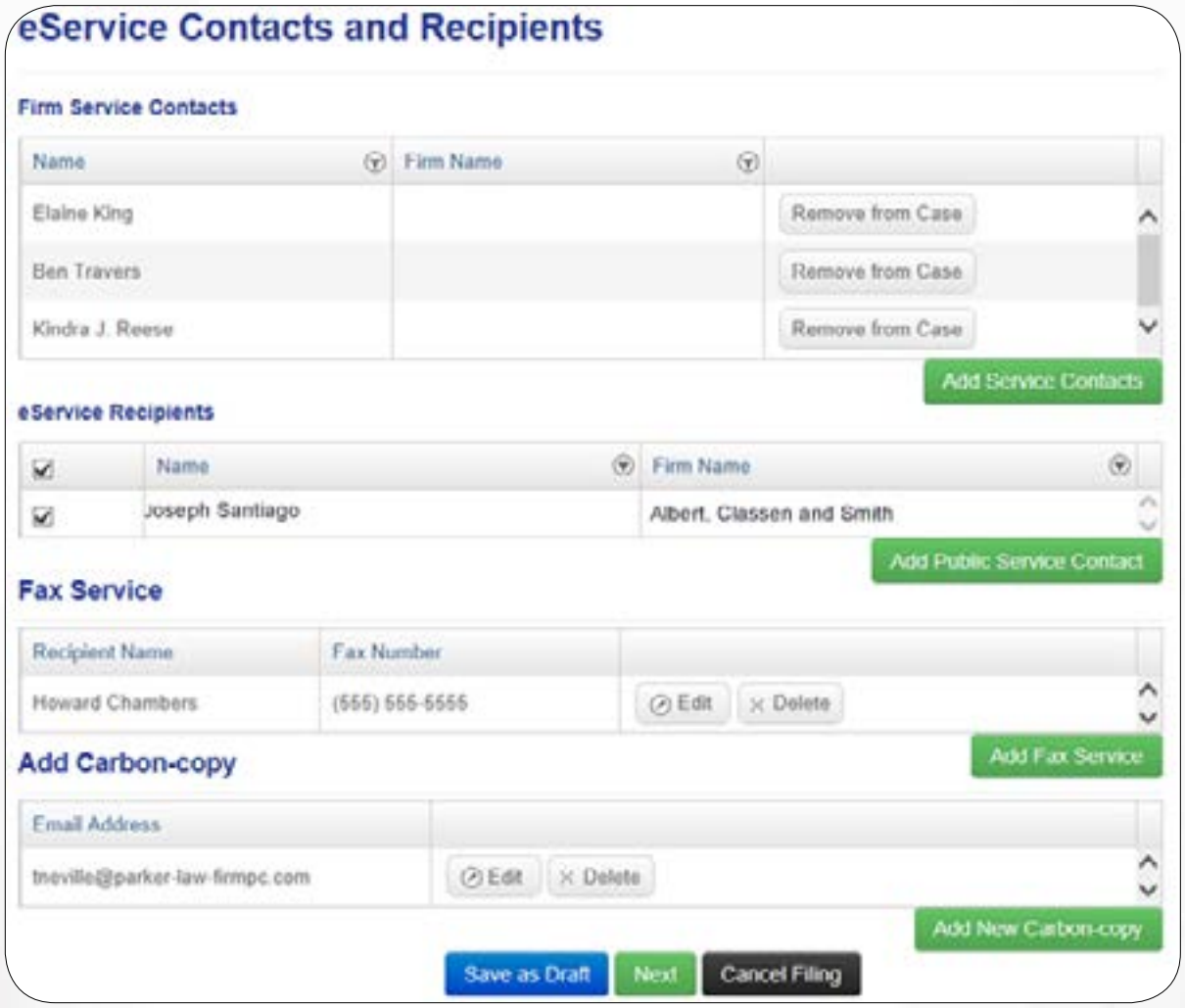


Figure 7-6, Completed Service Contacts Page

Click the **Next** button at the bottom of the page to move on.

Chapter 8

XIV. The eFiling Process - Submission Review

The **Submission Review** page (**Figure 8-1**) provides you an opportunity to review the details before you submit your filing.

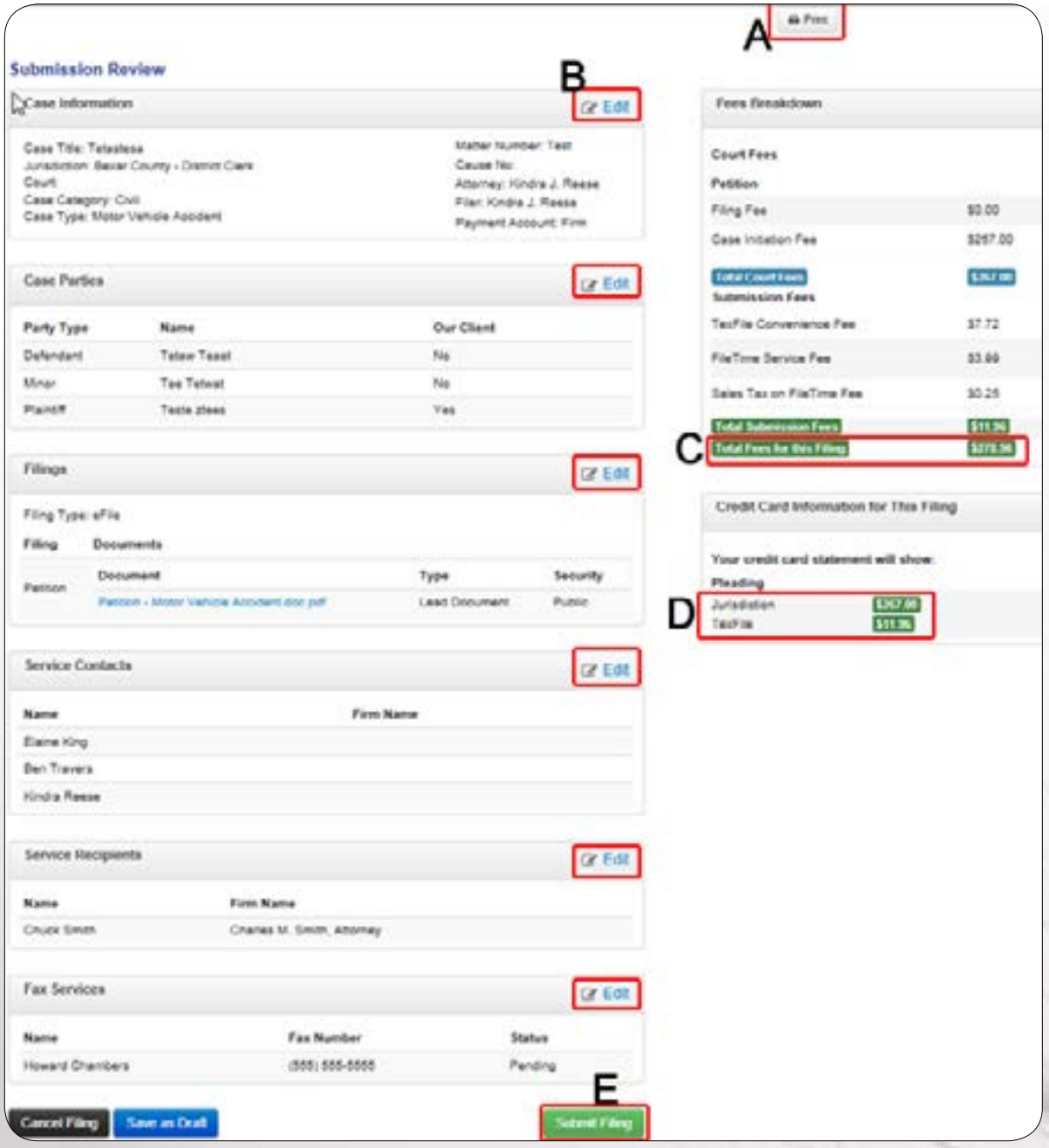


Figure 8-1, Submission Review Page

Look over the major sections to make sure the information is correct. You can edit any incorrect information by clicking thee **Edit** button in each section (**Figure 8-1, B**) in the respective section.

Areas to pay special attention to include:

- **Payment Account** - Make sure the correct payment account is selected.

- **Parties** - Make sure it correctly displays the party your firm represents (if applicable).
- **Documents** - If there is any question at all about whether you uploaded the correct documents click on the document link to open and view it.

You can print a copy of this page by clicking the **Print** button (**Figure 8-1, A**).

We show you the total fees for the submission (**Figure 8-1, C**) and how the fees will display on your credit card statement (**Figure 8-1, D**).

Since the clerks can, and sometimes do, make necessary changes to your submissions that change the final fees, it is best not to bill from a copy of this page.

Click the **Submit** button (**Figure 8-1, E**) when you are satisfied that the submission looks correct.

Chapter 9

XIV. The eFiling Process - Proof of Submission

Your **Proof of Submission** page (**Figure 9-1**) looks very similar to the Submission Review page in the previous section. You will receive an official acknowledgment email from eFileManager immediately after your submission so you do not need to print a copy of this page.

We provide a **Print** button (in the upper right page corner) that takes you to a printer-friendly page if you do wish to print the Proof of Submission page.

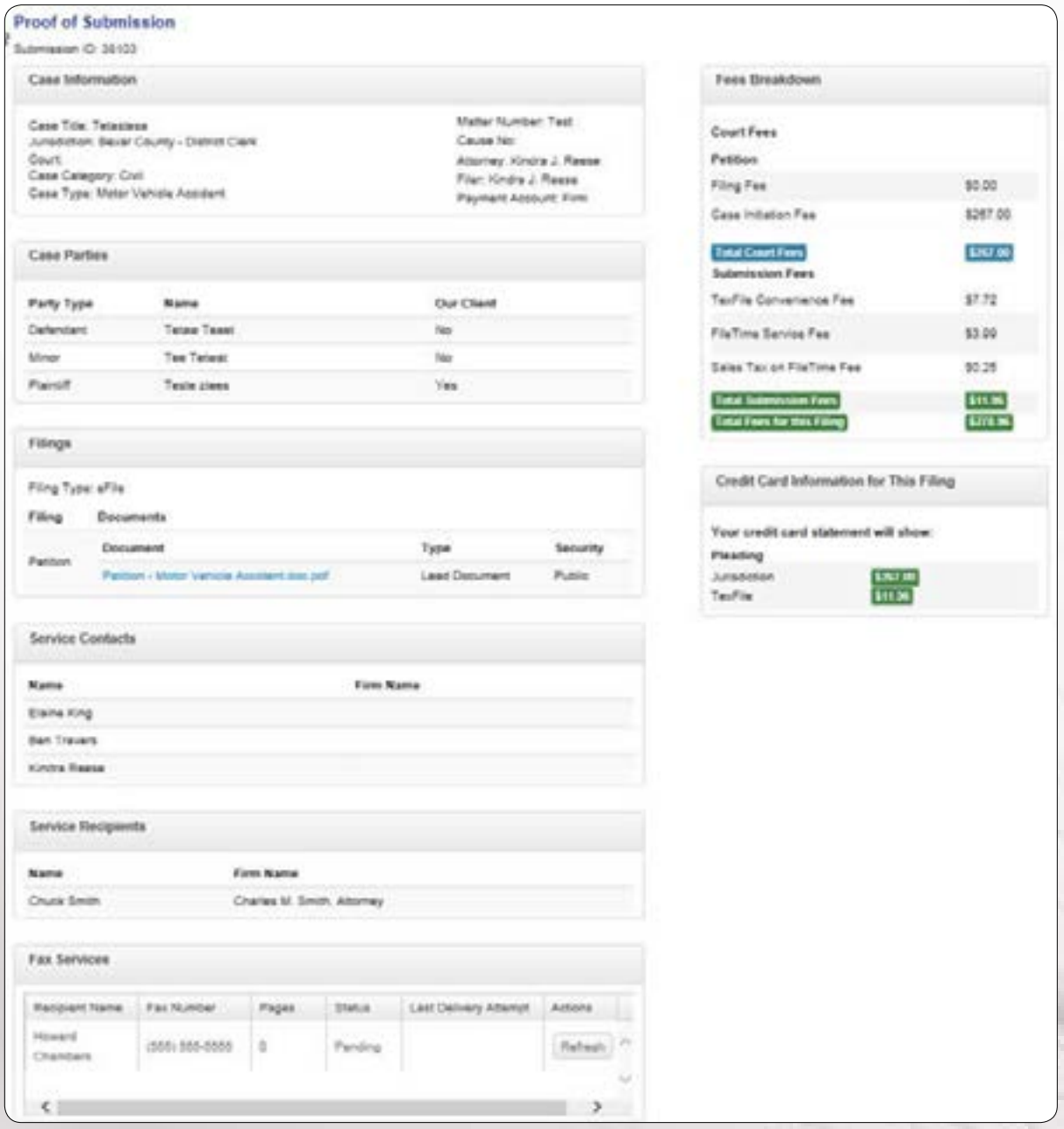


Figure 9-1, Proof of Submission Page

XIV. Noti ication eMails You Will/May Receive

A. eFileManager eFiling Noti ications - There may be some differences between each state. Please see eFileTexas notifications as a general guide of what you may see.

The following notification emails are delivered directly from eFileManager to the intended recipient. FileTime is not involved in any in the delivery process.

1. Submitted Filing Notification

You will receive this email immediately after your submission. You will receive an email for each filing included in the submission.

EFILE TEXAS.gov	**Filing Submitted** Envelope Number: **84000**

Filing Details	
Date/Time Submitted:	10/21/2014 11:01:45 AM
Filing Type:	Petition
Activity Requested:	EFileAndServe
Filed By:	Kinda Reese

Fee Details			
This envelope is pending review and fees may change.			
Case Fee Information			$282.21
Case Fees			$272.00
Convenience Fees			$8.21
Court Service Fees			$2.00
Petition			$10.00
• Optional Services	Fee Per	Quantity	
• Citation On A Civil Case Served By A Private Process Server	$8.00	1	$8.00
• Copies	$0.50	4	$2.00
Total: $292.21 (The envelope still has pending filings and the fees are subject to change)			

Document Details	
Lead File:	Petition - Motor Vehicle Accident.pdf
Lead File Page Count:	4

2. Accepted Filing Notification

You will receive this email immediately after a filing has been accepted by the clerk office.

EFILE TEXAS.gov	**Filing Accepted** Envelope Number: **84000**

Filing Details	
Case Number	2014-34876
Case Style	John Smith v Ames Towing
Date/Time Submitted	10/21/2014 11:01:45 AM
Date/Time Accepted	10/21/2014 11:10:53 AM
Filing Type:	Petition
Activity Requested:	EFileAndServe
Filed By:	Kindra Reese

Fee Details			
This envelope is pending review and fees may change.			
Case Fee Information			$282.21
Case Fees			$272.00
Convenience Fees			$8.21
Court Service Fees			$2.00
Petition			$10.00
• Optional Services	Fee Per	Quantity	
• Citation On A Civil Case Served By A Private Process Server	$8.00	1	$8.00
• Copies	$0.50	4	$2.00
Grand Total			$292.21

Document Details	
Lead File:	Petition - Motor Vehicle Accident.pdf
Lead File Page Count:	4
File Stamped Copy	**https://filerstage.efiletexas.gov/ViewDocuments.aspx?-FID=5d12c449-817b-4516-8693-208b071cbc0a** This link is active for 45 days.

Click the View Document link to download a file marked copy of the document. Note: All states will generally look like this, but may differ.

3. Filing Returned for Correction Notification

You will receive this notification when the clerk has returned the filing for correction. The clerk will provide the reason for the return.

EFILE TEXAS.gov	**Filing Returned** Envelope Number: **84006**

The filing below which has been previously served to you has been returned for further action from the filer.

Return Reason(s) from Clerk's Office	
Return Reason(s)	Incorrect/Incomplete Info: Please resubmit using correct Case Category
Return Comment	

Document Details	
Case Number	2013-CI-11516
Case Style	Amanda Fleming v Acme Trucking
Date/Time Submitted	10/22/2014 10:03:20 AM
Activity Requested	No Fee Documents
Filed By	Charles Smith
Service Contacts	Kindra Reese

The clerk has the option to "suspend" you filing for reasons such as:

- **Insufficient Fees** - Occurs is you do not select and pay the correct fees required for the filing. This might include not selecting the Case Initiation Fee, not selecting the appropriate number of copies to attach to the citation, etc.
- **Insufficient Funds** - This occurs when your credit card is declined by your credit card issuer. Neither FileTime nor eFileManager will ever decline a credit card - that is always an issue with your issuer.
- **Document Addressed to Wrong Clerk** - This occurs when you select the incorrect jurisdiction.
- **Incorrect/Incomplete Information** - This occurs when you do not have not included required information such as the case number, case type, party names, party addresses, attorney-party emails addresses, etc.
- **Incorrect Formatting** - There is a problem with one, or more, of the PDF files you submitted.
- **PDF Documents Combined** - The jurisdiction requires that each of the lead documents be filed as separate documents, not all combined.
- **Illegible/Unreadable** - The clerk deems the document to be illegible.
- **Sensitive Data** - You need to redact the sensitive data in the document.

In order to preserve the original submission date for you resubmission, use the **Returned for Correction method**. This may not apply to your state. Check with Clerk for more details.

4. **Failed Filing Notification**

You will receive this notification if/when eFileManager detects an error with one, or more, of the documents in the filing. The reason for the error will probably not be clear so call our Customer Support team so we can contact the eFileManager or clarification of what changes are needed.

EFILE TEXAS.gov	**Filing Failed** Envelope Number: **84010**

This is a notification indicating that your filing failed during submission. Please make the necessary changes and resubmit your filing.

Filing Details	
Case Number:	201432551
Envelope ID:	84010
Date/Time Submitted:	10/21/2014 11:01:45 AM
Case Style:	Amanda Fleming v Acme Trucking

Document Details	
Filings with error:	Petition - Motor Vehicle Accident.pdf
Documents that caused the error:	CivilCaseInformation.pdf
Reasons for Error:	

A Failed filing is always caused by an issue with one, or more, of the documents you submitted.

The most common reasons for this are:

- **Non-Allowed Character in the Document Name** - A document name can be composed only of alpha-numeric characters plus periods. You cannot use characters such as -, @. #, etc.
- **Non-Allowed Fonts** - This occurs most commonly when you OCR pre-printed government-style forms such as BVS forms. The OCR software sometimes inserts non-allowed fonts for symbols such as check boxes.
- **Outside Links** - You cannot eFile documents that contain links to URLs outside the document.

You will have to resubmit a new filing when a filing has been Failed by eFileManager. **Learn more about why eFileManager Fails filings and how to resolve the issues**.

B. eFileManager eService Notification eMails

eFileManager also sends four different notification emails regarding eService issues.

1. Notification of Service

eFileManager sends this email to every eService recipient for the case, unless the filer specifically chooses not to eServe a specific counsel.

EFILE TEXAS.gov	**Notification of Service** Envelope Number: **84010**

This is a copy of service for the filing listed. Please click the link below to retrieve the submitted document.

Filing Details	
Case Number:	201432551
Case Style:	Amanda Fleming v Acme Trucking
Court:	$$$courtname
Date/Time Submitted:	10/21/2014 11:01:45 AM
Activity Requested:	No Fee Documents
Filed By:	Anita Davalos
Service Contacts	Other Service Contacts not associated with a party on the case: Sherry Land (sland@myfirm.com)

Document Details	
Lead File:	$$$leaddocumentfilename
Lead File Page Count:	$$$leaddocumentpagecount
File Stamped Copy:	**https://www.efiletexas.gov/ViewServiceDocuments.aspx?ADMIN=0&SID=262f09eb-76f9-49f0-8478-58b01cd4b249&RID=66ceea5e-9712-463a-97dd-bd866257a826** This link is active for 7 days.

2. **Copy of Notification of Service**

eFileManager sends this email to persons designated to receive an Administrative Copy of eServices sent to a case eService recipient.

EFILE TEXAS.gov	**Copy of Service** Envelope Number: **84010**

This is a copy of service for the filing listed. Please click the link below to retrieve the submitted document.

Filing Details	
Case Number:	201432551
Case Style:	Amanda Fleming v Acme Trucking
Court:	$$$courtname
Date/Time Submitted:	10/21/2014 11:01:45 AM
Activity Requested:	No Fee Documents
Filed By:	Anita Davalos
Service Contacts	Other Service Contacts not associated with a party on the case: Sherry Land (sland@myfirm.com)

Document Details	
Lead File:	$$$leaddocumentfilename
Lead File Page Count:	$$$leaddocumentpagecount
File Stamped Copy:	**https://www.efiletexas.gov/ViewServiceDocuments.aspx?ADMIN=0&SID=262f09eb-76f9-49f0-8478-58b01cd4b249&RID=66ceea5e-9712-463a-97dd-bd866257a826** This link is active for 7 days.

3. **Service Undeliverable**

When eFileManager is not able to deliver an eService to the email address of the intended recipient that eService fails and this email is sent to the filer.

EFILE TEXAS.gov	**Service Undeliverable** Envelope Number: **84010**

This is a notification indicating that your filing failed during submission. Please make the necessary changes and resubmit your filing.

Filing Details	
Case Number:	201432551
Envelope ID:	84010
Date/Time Submitted:	10/21/2014 11:01:45 AM
Case Style:	Amanda Fleming v Acme Trucking

Document Details	
Filings with error:	Petition - Motor Vehicle Accident.pdf
Documents that caused the error:	CivilCaseInformation.pdf
Reasons for Error:	

When you receive this email you will need to serve the recipient in some other manner.

4. Filing Failed - eService Recalled

When a filer has eServed a recipient along with an eFiling, and if the eFiling is Returned for Correction by the clerk, this eService recall email is sent to the recipient.

EFILE TEXAS.gov	**Filing Returned** Envelope Number: **84010**

The filing below which has been previously served to you has been returned for further action from the filer.

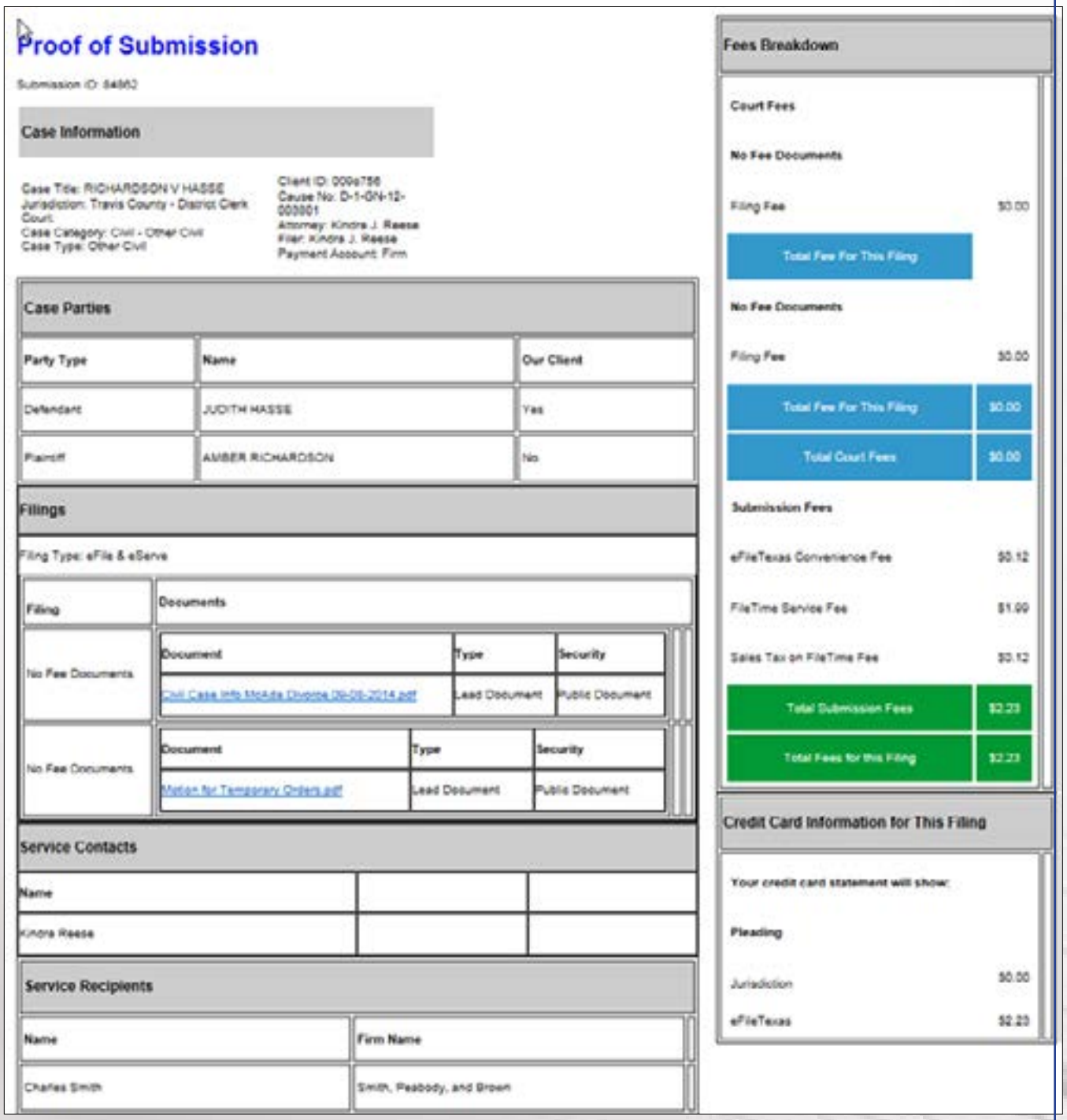
Return Reason(s) from the Clerk's Office	
Return Reason	Incomplete Signature Block - TRCP 21(f)(2)/TRCP 57
Return Comment	$$$rejectreason

Filing Details	
Case Number	DC-14-12214
Case Style	Helen Saunders, et al vs. Great State Insurance Company, et al
Court	Dallas County - District Clerk - Civil
Date/Time Submitted	5/15/2015 9:38:05 AM
Activity Requested	Motion (No Fee)
Filed By	Charles Smith
Service Contacts	$$$allcontacts

C. FileTime eFiling Notification eMails

FileTime sends the following eFiling Notification eMails:

1. Proof of Submission



Proof of Submission

Submission ID: 84662

Case Information

Case Title: RICHARDSON V HASSE
Jurisdiction: Travis County - District Clerk Court
Case Category: Civil - Other Civil
Case Type: Other Civil

Client ID: 009s756
Cause No: D-1-GN-12-003001
Attorney: Kindra J. Reese
Filer: Kindra J. Reese
Payment Account: Firm

Case Parties

Party Type	Name	Our Client
Defendant	JUDITH HASSE	Yes
Plaintiff	AMBER RICHARDSON	No

Filings

Filing Type: eFile & eServe

Filing	Documents		
No Fee Documents	Document	Type	Security
	Civil Case Info McKida Divorce 09-09-2014.pdf	Lead Document	Public Document
No Fee Documents	Document	Type	Security
	Motion for Temporary Orders.pdf	Lead Document	Public Document

Service Contacts

Name		
Kindra Reese		

Service Recipients

Name	Firm Name
Charles Smith	Smith, Peabody, and Brown

Fees Breakdown

Court Fees

No Fee Documents

Filing Fee $0.00

Total Fee For This Filing

No Fee Documents

Filing Fee $0.00

Total Fee For This Filing $0.00

Total Court Fees $0.00

Submission Fees

eFileTexas Convenience Fee $0.12

FileTime Service Fee $1.99

Sales Tax on FileTime Fee $0.12

Total Submission Fees $2.23

Total Fees for this Filing $2.23

Credit Card Information for This Filing

Your credit card statement will show:

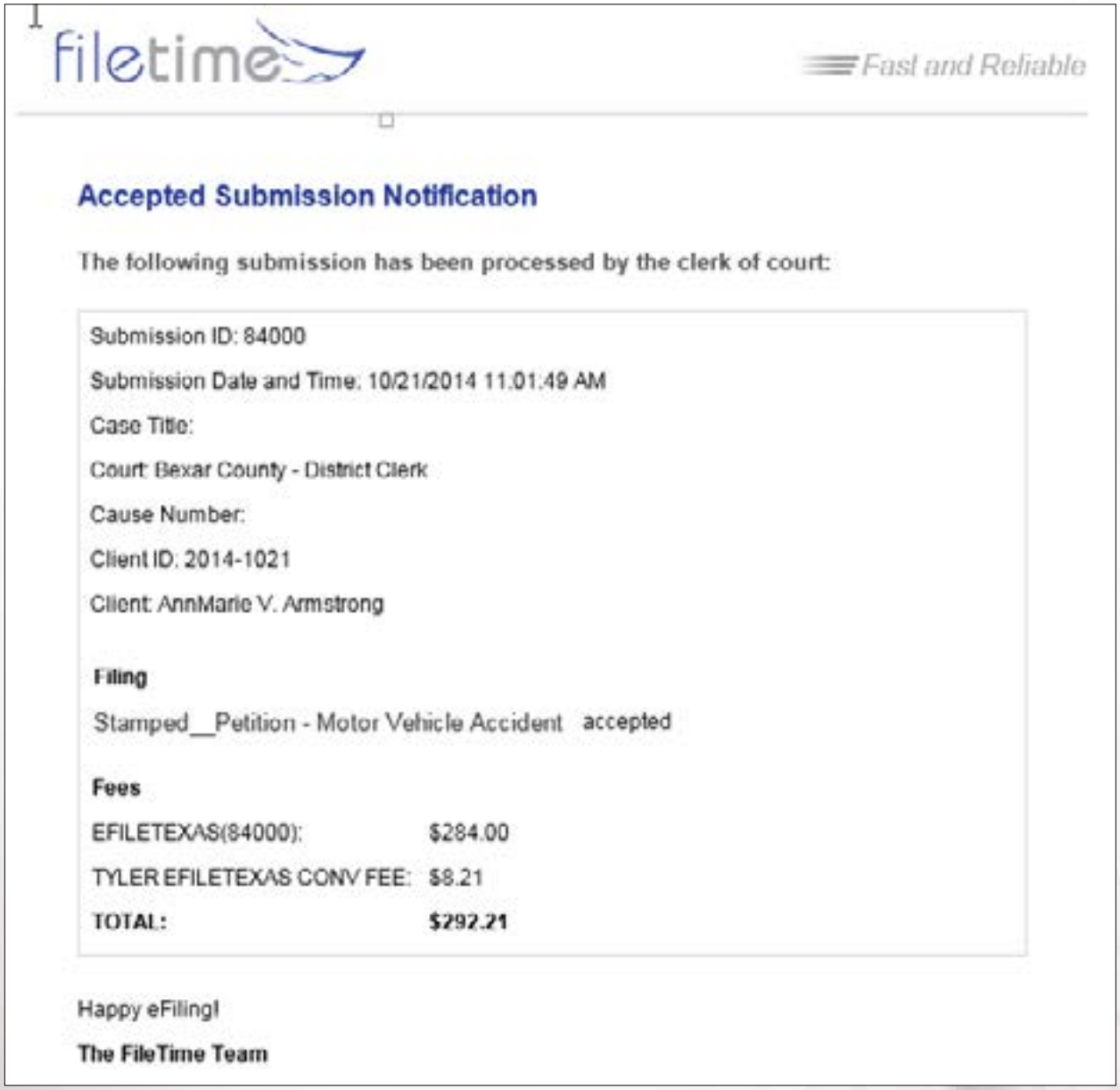
Pleading

Jurisdiction $0.00

eFileTexas $2.23

2. Accepted Filing

FileTime sends the following email to the filer after the filing has been accepted by the clerk of court. This email contains final eFiling fees data that can be used for billing.



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Accepted Submission Notification

The following submission has been processed by the clerk of court:

Submission ID: 84000
Submission Date and Time: 10/21/2014 11:01:49 AM
Case Title:
Court: Bexar County - District Clerk
Cause Number:
Client ID: 2014-1021
Client: AnnMarie V. Armstrong

Filing

Stamped__Petition - Motor Vehicle Accident accepted

Fees

EFILETEXAS(84000):	$284.00
TYLER EFILETEXAS CONV FEE:	$8.21
TOTAL:	**$292.21**

Happy eFiling!
The FileTime Team

3. FileTime Filing Returned for Correction Notification

FileTime sends the following email to the filer when the clerk of court returns the filing for correction. If the filer re-submits the filing using the instructions in the email the original submission date of the documents will be preserved.

Returned for Correction

SUB: Your submission has been Returned for Correction

The following submission was **returned for correction by the clerk of court:**

Submission ID: 113705

Client ID: FT2014-1110

Cause Number: 13-DCV-209661

Style: In the Matter of the Marriage of Rhonda Osagie and Kingsley Osagie

Jurisdiction: Fort Bend County - 328th Judicial District Court

Case Category: Family/Juvenile - Marriage Relationship

Case Type: Divorce No Children

Filing Type: eFile & eServe

Document Name: Motion for Discovery.pdf

Submission Time: 5/14/2015 9:57:12 AM

Clerk Comments: Please correct the case type.

Reject Reason: Incorrect Case Type

All the filing fees for this filing will be refunded.

To start a new filing based on this submission so the original submission date is preserved:

- Login at www.filetime.com
- Click one of the Submit Filing(s) buttons.
- Select the Returned for Correction Filing option.
- Resubmit.

Happy eFiling!

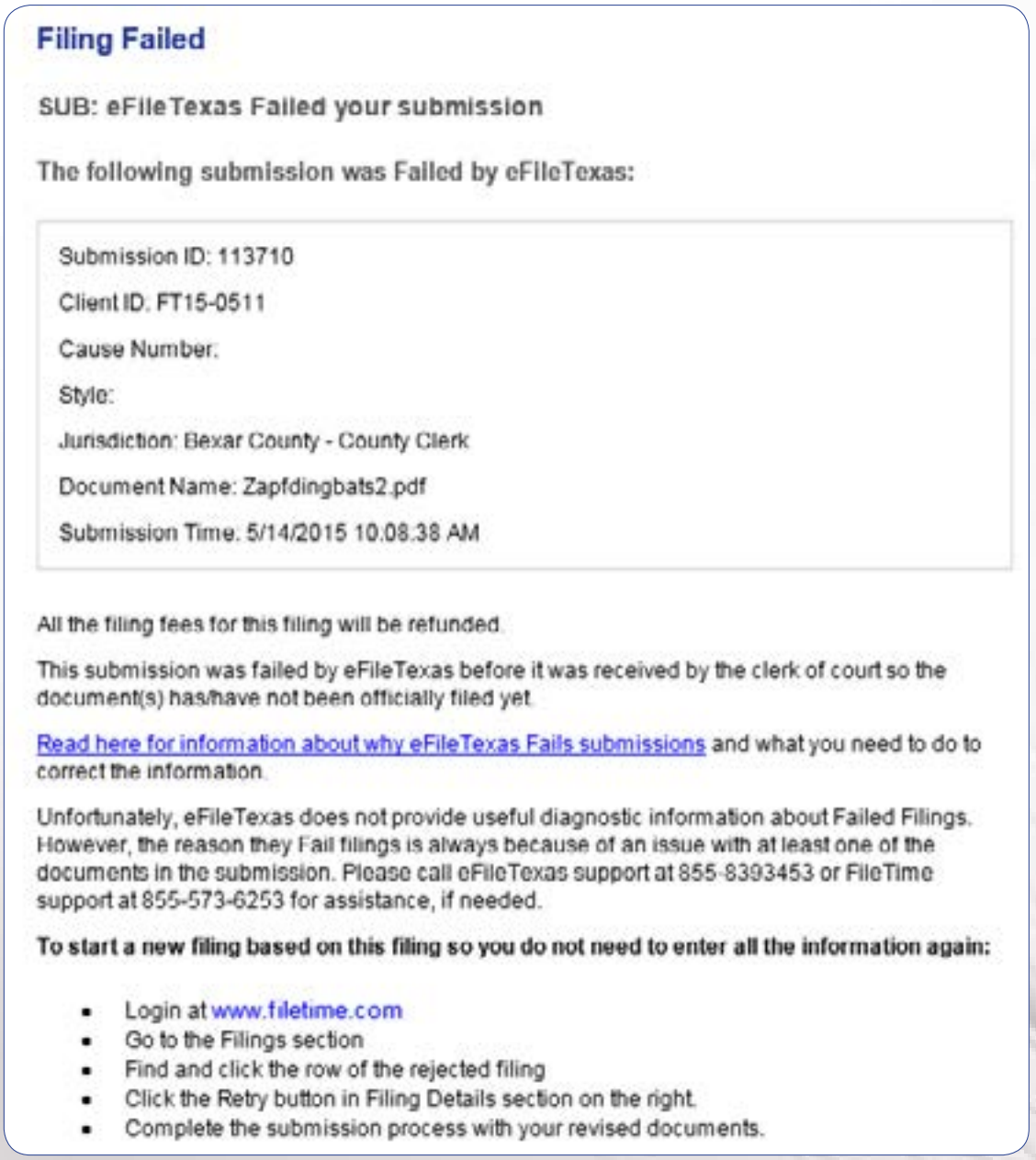
The FileTime Team

4. **FileTime Filing Failed Notification**

FileTime sends the filer the following email notification when a filing was failed by eFileManager before the filing was submitted to the clerk of court.

Therefore, the original filing date is not preserved.

eFileManager does not provide the reason a filing was Failed by them but it is always due to an **issue or issues with the document(s).**



Filing Failed

SUB: eFileTexas Failed your submission

The following submission was Failed by eFileTexas:

Submission ID: 113710
Client ID. FT15-0511
Cause Number:
Style:
Jurisdiction: Bexar County - County Clerk
Document Name: Zapfdingbats2.pdf
Submission Time. 5/14/2015 10.08.38 AM

All the filing fees for this filing will be refunded.

This submission was failed by eFileTexas before it was received by the clerk of court so the document(s) has/have not been officially filed yet.

Read here for information about why eFileTexas Fails submissions and what you need to do to correct the information.

Unfortunately, eFileTexas does not provide useful diagnostic information about Failed Filings. However, the reason they Fail filings is always because of an issue with at least one of the documents in the submission. Please call eFileTexas support at 855-8393453 or FileTime support at 855-573-6253 for assistance, if needed.

To start a new filing based on this filing so you do not need to enter all the information again:

- Login at www.filetime.com
- Go to the Filings section
- Find and click the row of the rejected filing
- Click the Retry button in Filing Details section on the right.
- Complete the submission process with your revised documents.

D. FileTime eService Notification Emails

FileTime sends the following eService-related emails unless you specifically opt-out of receiving them.

1. eService Status

FileTime sends the eService Status email to the filer to provide a quick view of the status of the services.

- A status of **Served** indicates that the recipient has been legally served.
- A status of indicates that the service failed and you need to eServe the recipient using another method.

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This updates you with the status of service to counsel for the following submission:

Submission ID: 109242

Old Submission ID:

Submission Date and Time: 03/30/15 10:12 AM

Case Title: In the Matter of the Marriage of Rhonda Osagie and Kingsley Osagie

Court: Fort Bend County - 328th Judicial District Court

Cause Number: 13-DCV-209661

Client ID: FT2014-1110

Client: Kingsley Osagie

Filing(s)

No Fee Documents

No Fee Documents

Service Status

Status	Recipient	Serving Firm
Served	Thomas Schoolcraft	Law Office of Kindra Reese
Served	Kenneth Williams	Williams and Williams

2. Copy of eService

If you have designated additional firm staff to receive copies of eService notifications sent to you, they will receive the following notification email from FileTime.

Subject: Notification of Service for Case No.DC-14-12214

eServed for Case No. DC-14-12214
Date and Time Filed: 05/15/15
Served To:
From Filer: Charles Smith
From Filer Firm: Smith, Peabody, and Brown

You may retrieve the service document using one of the following two methods:

1. Download Document – Click this link now to download the document
https://www.efiletexas.gov/DownloadResource.ashx?RID=022e9c6b-811d-41fe-be54-fc4bfac03f89

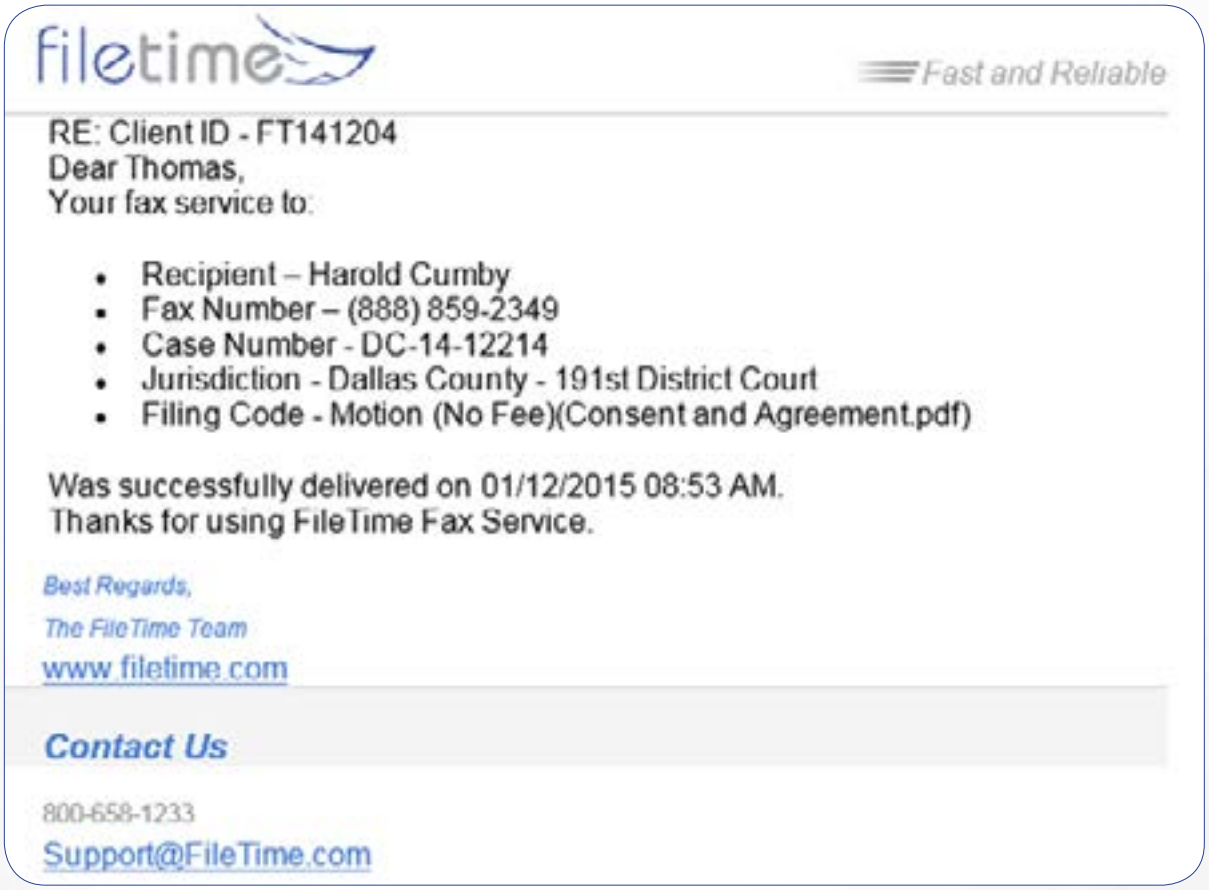
2. Login at www.filetime.com, go to eServices > Inbox, locate this eService and click on it to view the service details and print the service document(s).

You can log in to www.filetime.com anytime from anywhere and download this document.

E. FileTime Fax Service Notifications

1. Fax Service Successful

FileTime sends the following email to the filer when a fax service is successful.



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RE: Client ID - FT141204
Dear Thomas,
Your fax service to:

- Recipient – Harold Cumby
- Fax Number – (888) 859-2349
- Case Number - DC-14-12214
- Jurisdiction - Dallas County - 191st District Court
- Filing Code - Motion (No Fee)(Consent and Agreement.pdf)

Was successfully delivered on 01/12/2015 08:53 AM.
Thanks for using FileTime Fax Service.

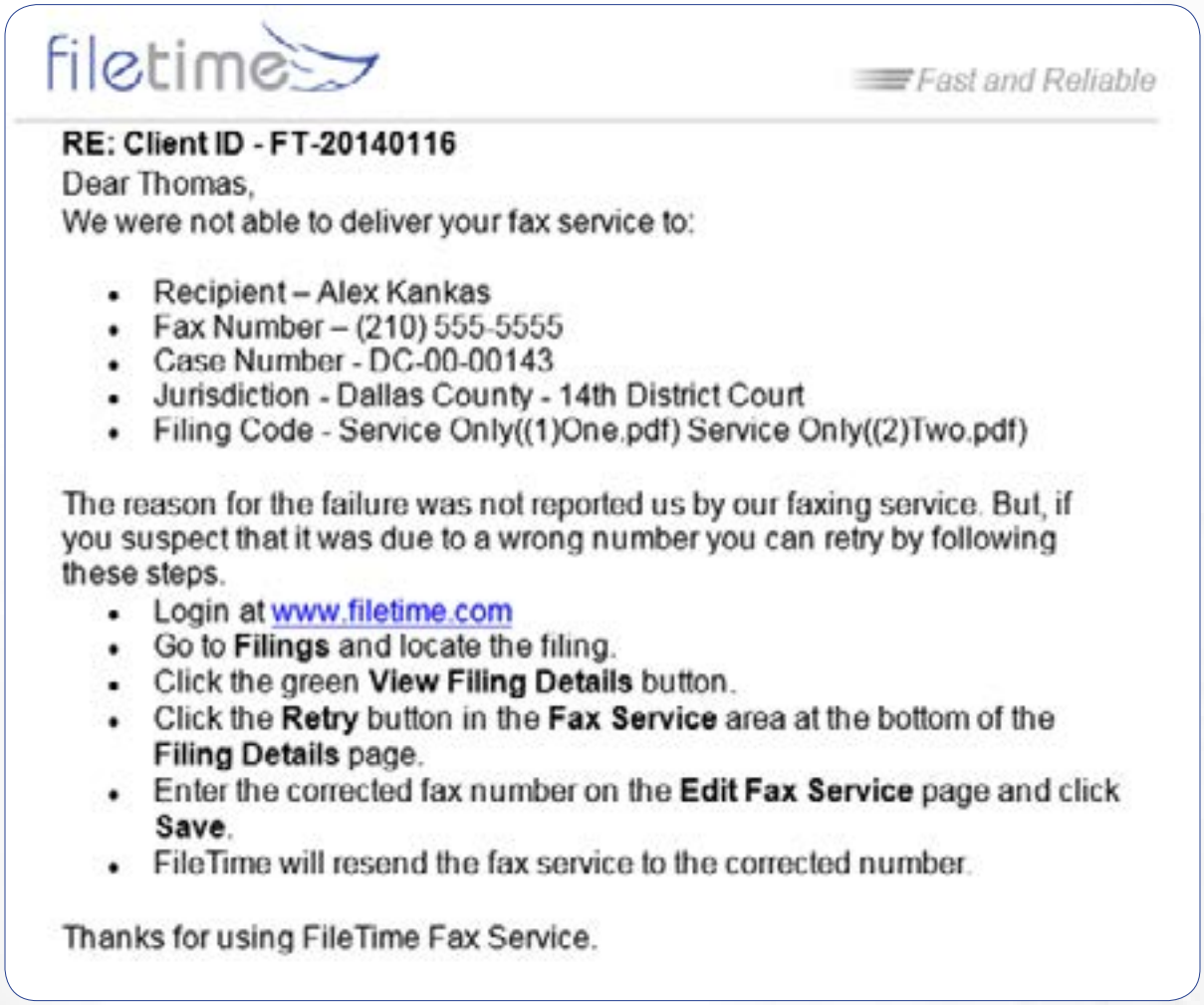
Best Regards,
The FileTime Team
www.filetime.com

Contact Us

800-658-1233
Support@FileTime.com

2. Fax Service Failed

FileTime sends the following email to the filer when an eFax cannot be delivered.



filetime Fast and Reliable

RE: Client ID - FT-20140116

Dear Thomas,

We were not able to deliver your fax service to:

- Recipient – Alex Kankas
- Fax Number – (210) 555-5555
- Case Number - DC-00-00143
- Jurisdiction - Dallas County - 14th District Court
- Filing Code - Service Only((1)One.pdf) Service Only((2)Two.pdf)

The reason for the failure was not reported us by our faxing service. But, if you suspect that it was due to a wrong number you can retry by following these steps.

- Login at www.filetime.com
- Go to **Filings** and locate the filing.
- Click the green **View Filing Details** button.
- Click the **Retry** button in the **Fax Service** area at the bottom of the **Filing Details** page.
- Enter the corrected fax number on the **Edit Fax Service** page and click **Save**.
- FileTime will resend the fax service to the corrected number.

Thanks for using FileTime Fax Service.

XI. View Filing Details

To view the details of a specific filing, under the **Workspace** area click the Filings button (**Figure 11-1, A**). You will now be on the Filings page (**Figure 11-1, B**).

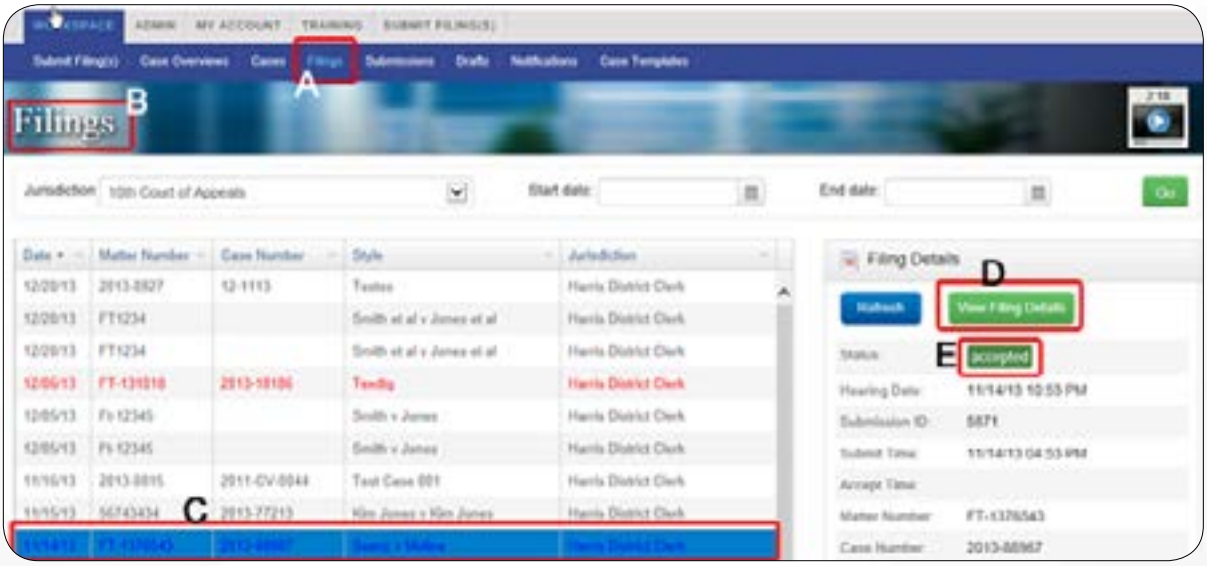


Figure 11-1, Submitted Filings

Click the row for a specific filing (**Figure 11-1, C**) and the **Filing Details** section opens on the right.

To view the complete details of the filing (**Figure 11-2**), click the **View Filing Details** button (**Figure 11-1, D**).

The current status of the filing also displays (**Figure 11-1, E**).

After clicking the **View Filing Details** button the **Filing Details** page opens, **Figure 11-2**.

The major features of this page include:

- **Return to Filings** (**Figure 11-2, A**) - Click this button to return to the **Filings** page to view the details of other filings.
- **Get Details from EFM** (**Figure 11-2, B**) - Occasionally, we do not receive the filing details update from eFileManager. Click this button to manually download the latest information on this filing.
- **Print Proof of Filing** (**Figure 11-2, C**) - Click this button to print a **Proof of Filing** page.
- **Print Proof of Fax Service** (**Figure 11-2, D**) - Print this button to click a **Proof of Fax Service** page.
- **Print** button (**Figure 11-2, E**) - Click this button to access a printer-friendly version of this page.
- **Submission ID** (**Figure 11-2, F**) - This is the unique identifier for the submission of this filing. eFileManager refers to it as the **Envelope ID**.
- **Submission Date and Time** (**Figure 11-2, G**) - This shows the local time of submission, which sets the time for the file stamp unless the filing was submitted on a weekend or legal holiday or into a jurisdiction with a different time zone.

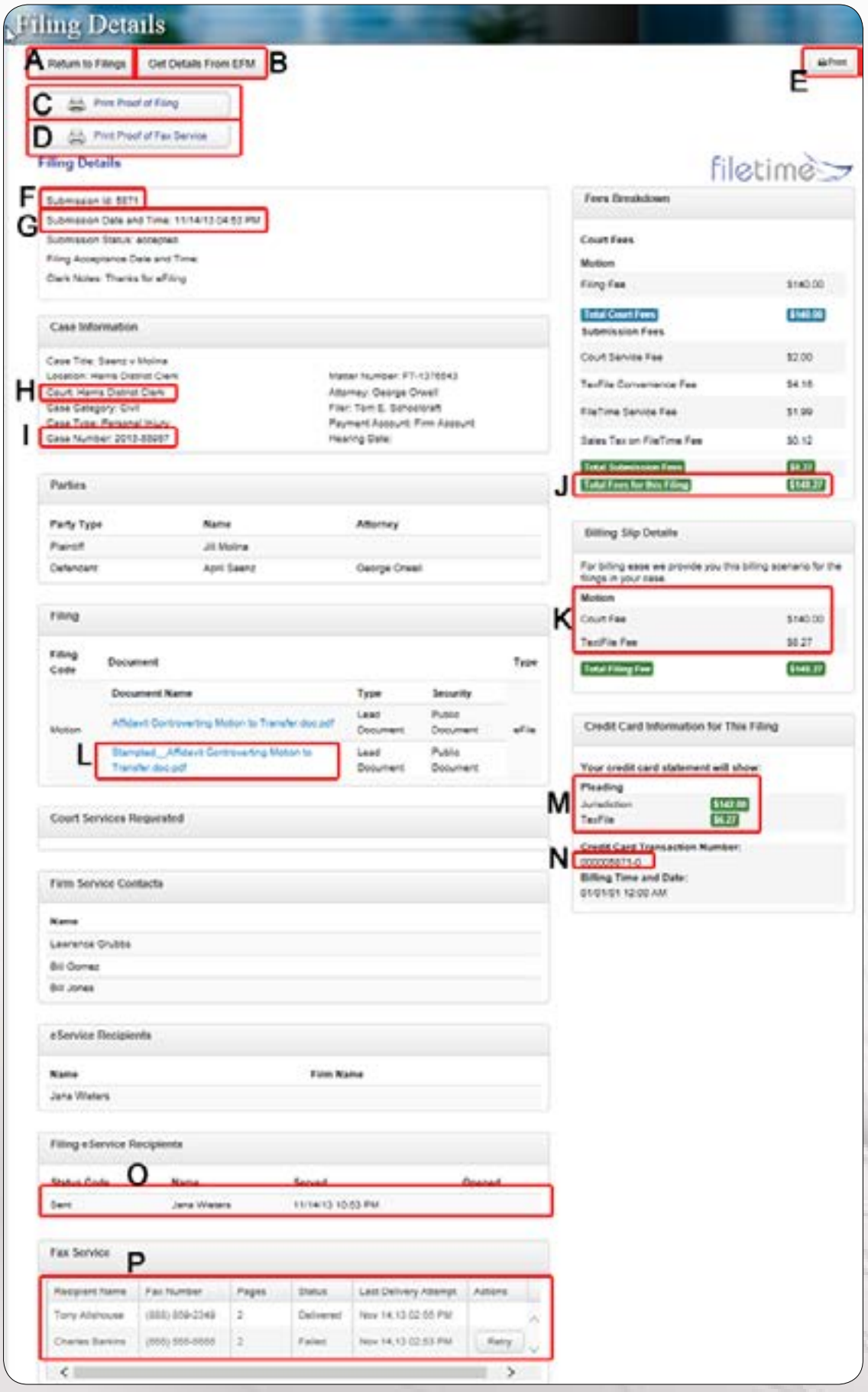


Figure 11-2, Filing Details Page

- **Court Assignment** (**Figure 11-2, H**) - The court assigned for this case displays here.
- **Cause/Case/Docket Number** (**Figure 11-2, I**) - The cause/case/docket number displays here.
- **Total Filing Fees** (**Figure 11-2, J**) - This is a total of the fees for the filing.
- **Fees Breakdown** (**Figure 11-2, K**) - This shows how the fees are split between eFileManager and the jurisdiction.
- **Link to File Stamped Document** (**Figure 11-2, L**) - Click the link to view/download a copy of the file stamped document.
- **Credit Card Fee Display** (**Figure 11-2, M**) - This section shows you how the fees will display on your credit card statement.
- **Credit Card Transaction Number** (**Figure 11-2, N**) - This displays the credit card processing transaction number.
- **eService Status** (**Figure 11-2, O**) - This section shows you the eService recipients, any failed eServices, and whether the recipient has opened the service.
- **Fax Service Status** (**Figure 11-2, P**) - This section displays the status of any Fax Service requested with the eFiling.

Chapter 12

XII. Canceling a Submitted eFiling

You may cancel an entire submission or individual filings in the submission.

A. Cancel an Entire Submission

You can cancel all the filings in an entire submission until the time that the clerk locks one of the filings in the submission for review. After the filing has been locked for review or processed by the clerk you cannot cancel the entire submission but you may be able to cancel any filings in the submission that have not been locked for review by the clerk's office.

To cancel a submission, go to the **Submissions** page (**Figure 12-1, A**).

Figure 12-1, Cancel a Submission

Find the subject submission and click it to highlight it (**Figure 12-1, B**).

In the **Submission Details** section that opens in the right column, click the **Cancel** button (**Figure 12-1, C**).

The submission will now be canceled and all submission fees refunded back to you. It may take a few days for the fees to disappear from your account but they will. If you get an error message that the submission could not be canceled, it is because the clerk has locked one of the filings in the submission for review.

The eFileManager system will not notify any of your eService recipients that the submission has been canceled so that will be your responsibility.

B. Cancel an Individual Filing

You can cancel a filing until the time that the clerk locks the filings for review. After the filing has been locked for review or processed by the clerk you cannot cancel it.

To cancel a filing, go to the **Filings** page (**Figure 12-2, A**).

Figure 12-2, Cancel a Filing

Find the subject filing and click it to highlight it (**Figure 12-2, B**).

In the **Filing Details** section that opens in the right column, click the **Cancel** button (**Figure 12-2, C**).

The filing will now be canceled and all fees for that individual filing refunded back to you. It may take a few days for the fees to disappear from your account but they will. If you get an error message that the filing could not be canceled, it is because the clerk has locked the filing for review.

The eFileManager system will not notify any of your eService recipients that the filing has been canceled so that will be your responsibility.

Chapter 13 - Templates

XIII. Templates

A. Case Templates

If your firm frequently initiates actions similar actions the Case Templates can save your firm filers time and reduce the incidence of data entry errors.

Firm eFiling Administrators can as many Case Templates as needed by your firm and they will all be available to your firm staff when they begin an eFiling submission.

It is important to note that the jurisdiction and party data in the template will be deleted if the filer changes the jurisdiction, Case Category, or Case Type.

1. Create a Case Template

On the **Workspace** tab (**Figure 13-1, A**) click the drop-down arrow on the **Templates** button (**Figure 12-1, B**) located on the sub-navigation bar.

Click the **Case Templates** button (**Figure 13-1, C**) on the drop-down menu.

Figure 13-1, Go to Case Templates

The **Case Templates** page opens (**Figure 13-2**). The templates area will be empty if you have not yet created any case templates.

Figure 13-2, Case Templates Page

Click the **Add New Case Template** button (**Figure 13-2, B**) to create a case template.

The **Case Template** page opens (**Figure 13-3**)

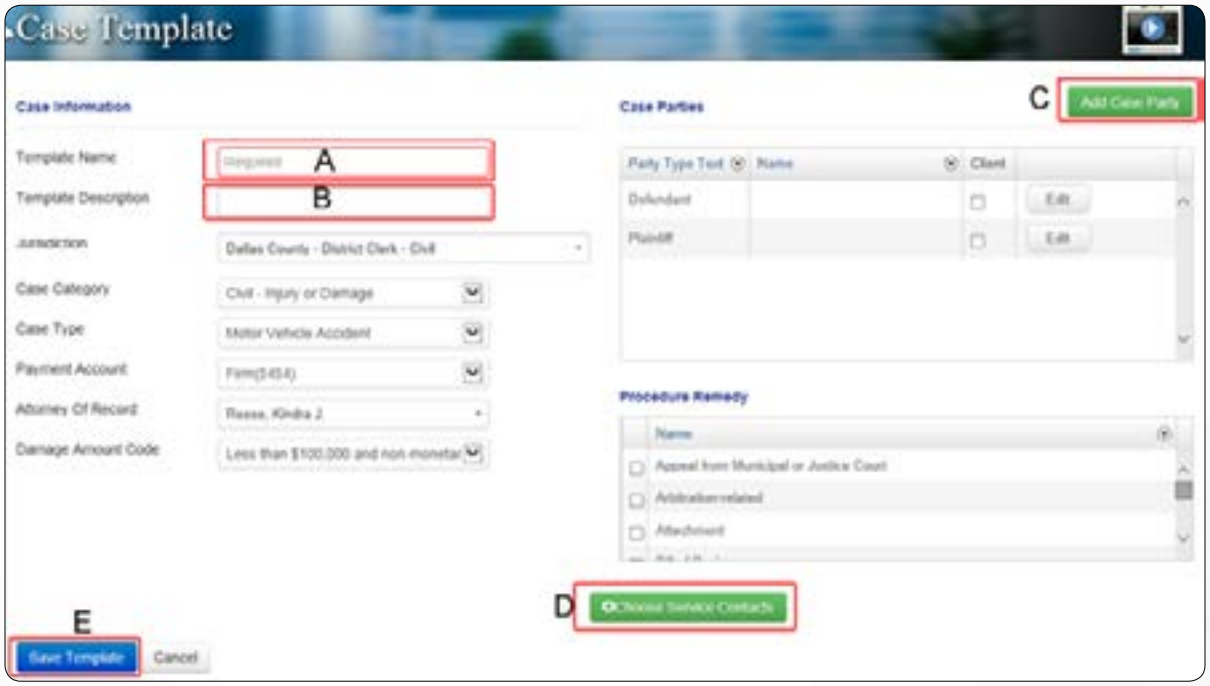


Figure 13-3, Create a Case Template

Add case template to the appropriate fields as shown below. The only field that is required is the **Template Name** (**Figure 13-3, A**).

The **Template Description** field (**Figure 13-3, B)** is not required but may help you locate the correct template more quickly if your firm makes many of them.

Add Case Parties (**Figure 13-3, C)** as appropriate for the template.

If desired, you can click the **Choose Service Contacts** button **Figure 13-3, D)** to associate your firm's service contact(s) with this template.

Click the **Save Template** button (**Figure 13-3, E)** when you are done.

Your Firm eFiling Administrator has the ability to edit any case template if later changes are needed to the template.

1. **Start a New Case Filing with a Case Template**

   On the **Workspace** tab (**Figure 13-1, A**) click the drop-down arrow on the **Templates** button (**Figure 12-1, B**) located on the sub-navigation bar.

   Click the **Case Templates** button (**Figure 13-1, C**) on the drop-down menu.

   On the **List of Case Templates** page (**Figure 13-2**), click the **Submit** button (**Figure 13-2, F**) for the template you choose.

   The **View** button (**Figure 13-2, E**) enables you to see the case info but it is also available for you to view **Case Template Details** section in the right column (**Figure 13-2, D**).

   Complete the submission as you normally would.

A. Case Party Templates

If you have a client or an entity for or against which you frequently initiate actions it would save time and reduce errors to save the party name and address information. This would enable your firm filers to use the saved info instead of having to manual enter it for each new case.

1. **Create a Case Party Template**

You can also save a Case Party Template while entering a case party as you will see further down.

From **Workspace** on the top navigation menu, click the **Templates** button (**Figure 13-1, B**) on the sub-menu.

Then click the **Case Party Template** button (**Figure 13-1, D**) on the drop-down menu.

The **Case Party Templates** page opens (**Figure 13-4**).

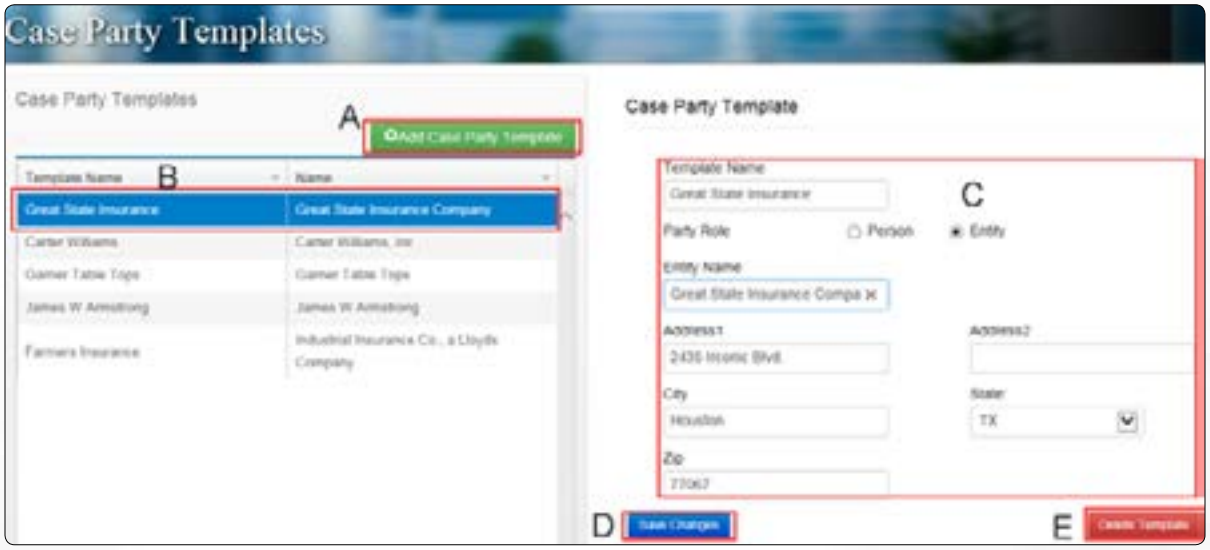


Figure 13-4, Case Party Templates

Initially you will see no templates on the **Case Party Templates** page. However, from this page you can:

- click the **Add New Case Parties** button (**Figure 13-4, A**) to add new case party templates,
- **edit** any case party templates you have created. Click a template to highlight it (**Figure 13-4, B**) and make any changes in the details area (**Figure 13-4, C**). Be sure to click the **Save Changes** button (**Figure 13-4, D)** if you make any changes to a template.
- and delete Templates (**Figure 13-4, E)** as necessary.

Click the **Add Case Party Template** button (**Figure 13-4, A**) to create a new Case Party Template.

The **Add Case Party Template** page opens (**Figure 13-5**).

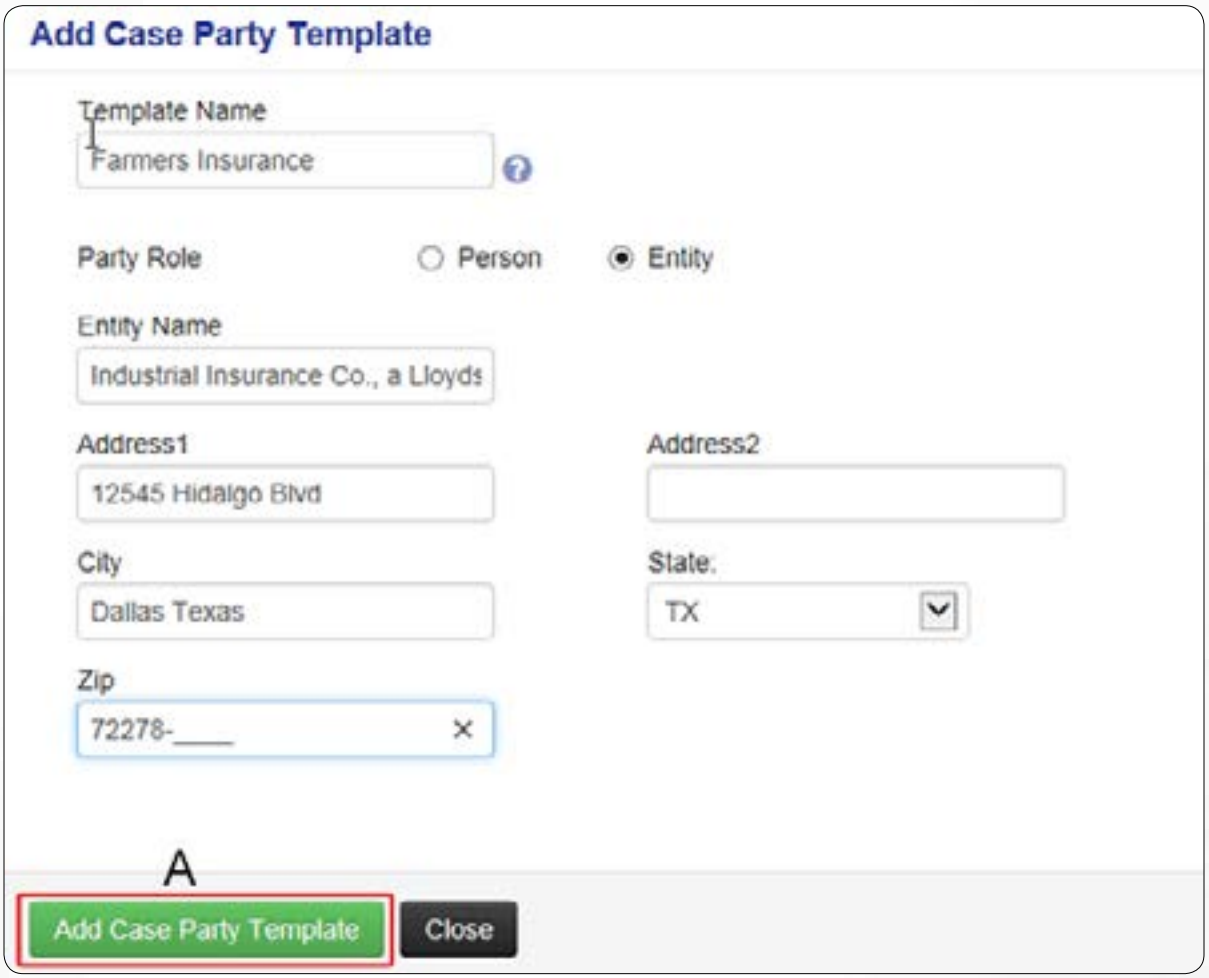


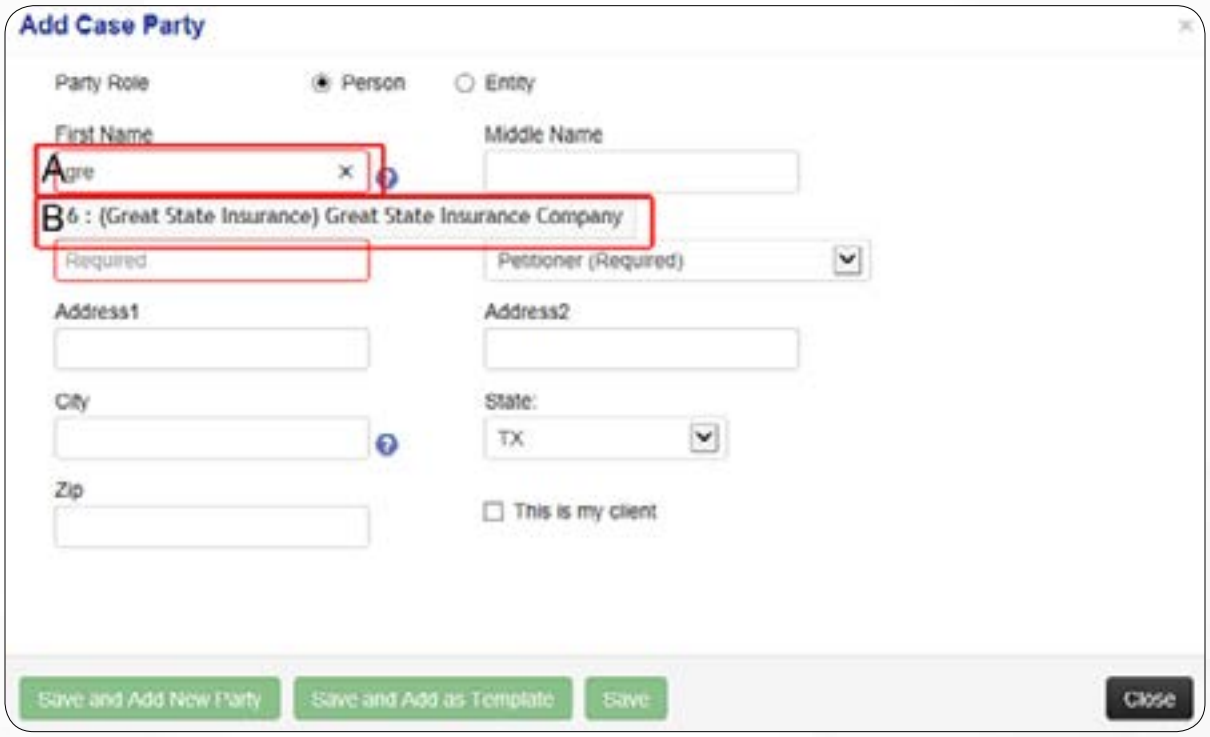
Figure 13-5, Create a Case Party Template

Complete the page and click the **Add Case Party Template** button (**Figure 13-5, A**) to save it.

1. **Using a Case Party Template During a Submission**

   When you are entering case parties information during the submission process any templates you, or other firm members, have created will be accessible to you.

   In the example below (**Figure 13-6**), we entered the first few letters (**Figure 13-6, A**) of the case party template name: Great State Insurance Company.



13-6, Select Case Party Template Name

FileTime presents the template option to you (**Figure 13-6, B**)... just click on the name of the template.

The party name and address information for the case party template automatically populate the **Add Case Party** page for you (**Figure 13-7**).

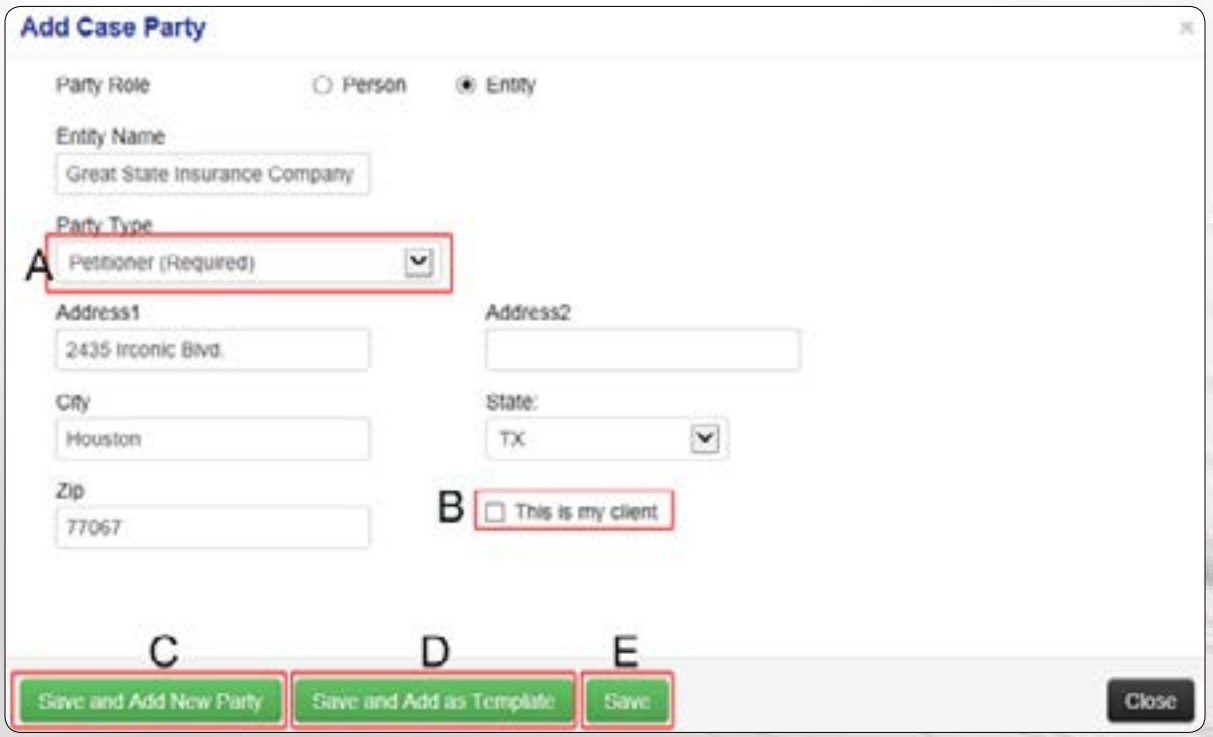


Figure 13-7, Case Party Information Populates Fields

Be sure to select the correct **Party Type** (**Figure 13-7, A**) and check if this party is your client (**Figure 13-7, B**).

If you need to enter another party click the **Save and Add New Party** button (**Figure 13-7, C**).

Click the **Save and Add as Template** button (**Figure 13-8, D**) if you did not use a template for this case party but want to save it as a new template.

Click the **Save** button (**Figure 13-7, E**) when you are finished adding case parties.

Chapter 14

XIV. Archiving/Reactivating Cases

FileTime enables you to archive inactive cases and submissions, filings, and eServices. Archiving moves inactive cases, for instance, from the list of active cases but it does not delete those cases from our data base. You can later access an archived case and reactivate them it if necessary.

A. Archive a Case/Submission/Filing

Using the **Cases** page, click on the row for the case you want to archive, causing it to be highlighted.

Click the **Archive** button (**Figure 14-1, A)** for that case.

The case is now moved from the list of active cases to the **Archived Cases** list.

Use the same process to archive **submissions, ilings**, and **eServices** on their respective pages.

Be aware that this process archives the case for your entire firm.

B. Access an Archived Case

Again using the **Case** as an example, click the **Cases** drop down menu (**Figure 14-2, A**).

From the **Archived Cases** list choose the Case you wish to review and click on the row of the case to highlight it.

Click the **Refresh** button (**Figure 14-4, B**) to download the most current information about the case from eFileManager.

Click the **File** button (**Figure 14-4, C**) to initiation a submission for the archived case.

C. Reactivate an Archived Case

Click the **Reactivate** button (**Figure 14-4, D**) to move the case from the archive to your firm's list of active cases.

Chapter 15

XV. Retrieving Your File Stamped Document

There are many ways to view and print your file stamped documents in FileTime. Listed below are a few of the ways to do so.

A. From Cases

This method is probably the quickest and it allows you to print the file stamped documents as you wish for submissions in a case.

After logging into FileTime, you are by default on **Workspace** (Figure 1, A) > **Cases** (Figure 1, B)

Find the case and click the **+** sign in the far left column so it becomes a **-** sign (Figure 1, C).

On the tabs than open below the case, click the **Case Documents** tab (Figure 1, D).

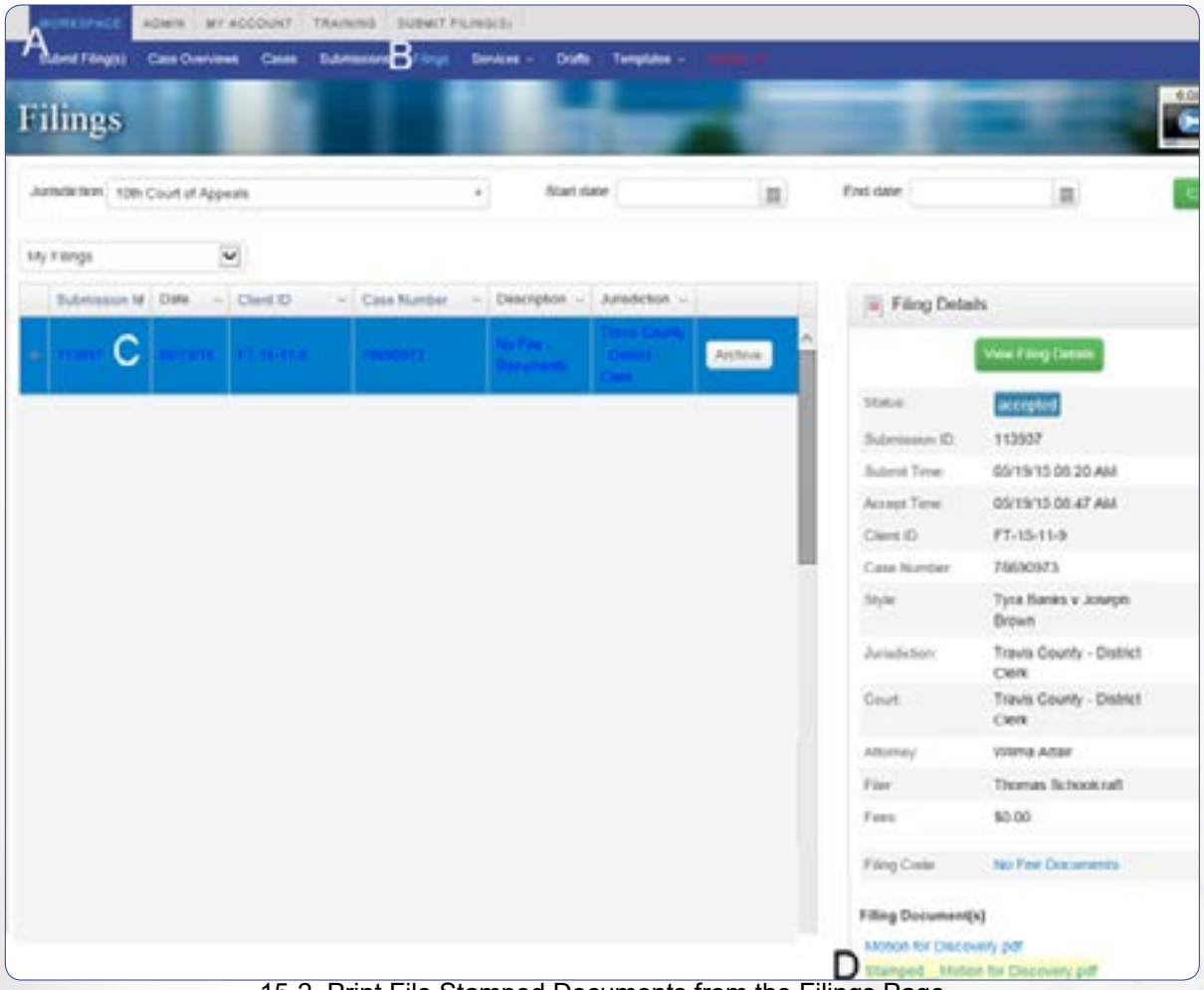
You can then click the **Print** button for any submission and print the file stamped document for any submission.

B. From Filings

After logging into FileTime, click the **Filings** button (Figure 2, B) on the sub-navigation bar.

Find the filing in question and click it to highlight it (Figure 2, C).

Scroll to the bottom of the **Filing Details** section for that filing and click the link to the file stamped document (Figure 2, D) to open and then print it.



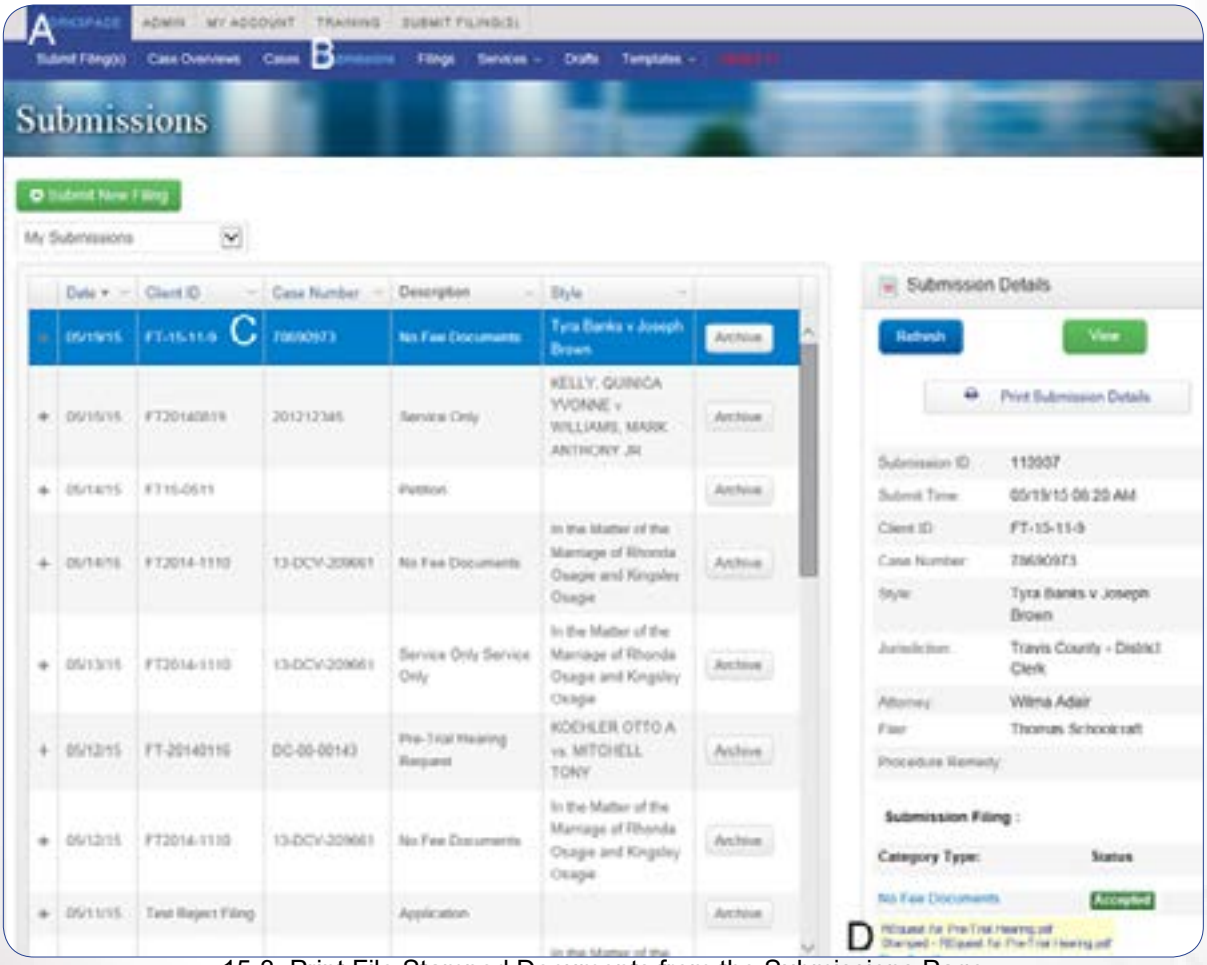
15-2, Print File Stamped Documents from the Filings Page

C. From Submissions

After logging into FileTime, click the **Submissions** button (Figure 3, B) on the sub-navigation bar.

Find the submission in question and click it to highlight it (Figure 3, C).

Scroll to the bottom of the **Submission Details** section for that filing and click the link to the file stamped document (Figure 3, D) to open and then print it.



15-3, Print File Stamped Documents from the Submissions Page

Chapter 16

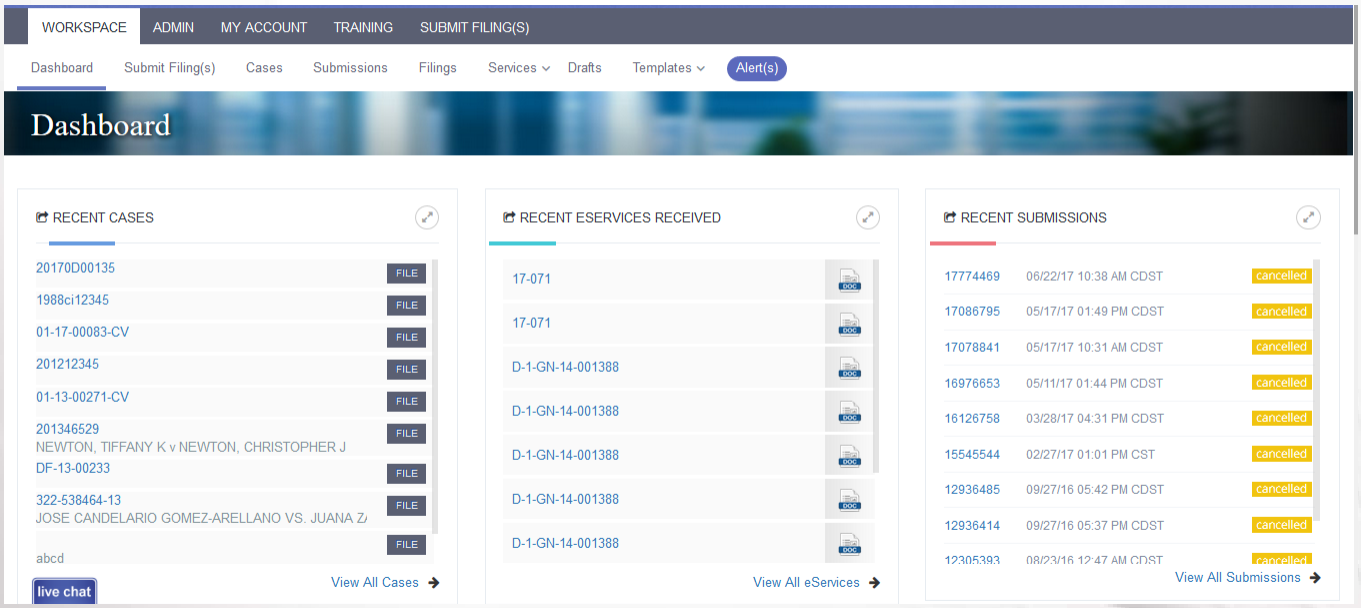
XVI. The Dashboard Page

The **Dashboard** page is arguably the most important page on the FileTime site. On this page you can:

- Start an existing case submission,
- Review case information,
- Look at all submissions for each case as well as print the submission details,
- Look at all alerts
- View all eServices received from other counsel for the case
- and reach multiple quick links for your benefit

You arrive on this page by default after logging in to FileTime.

To receive the maximum benefit from this page you should know how to use the powerful search and navigation features in FileTime so you can quickly find a specific case.



The Cases Page

A. Case Information Tab

This tab (Figure 16-1, B) provides you the basic information about the case (Figure 16-1, C). Not all jurisdictions provide the Case Style and Court assignment initially so you may see null values in these fields until FileTime is able to obtain that information from eFileManager

B. Submissions Tab

The **Case Submissions** page (Figure 16-2) by clicking the **Submissions** tab (Figure 16-2, A).

This page displays all the submissions by your firm for this case (Figure 16-2, C).

Click the **+** sign in the far left column (Figure 16-2, D) and you can view the individual filings in this submission.

Click the **View** button (Figure 16-2, E) to open the Submission Information page. From this page you view all the information about the submission as well as view and print the file stamped documents.

Click the **Print Case Billing Report** button (Figure 16-2, B) to print a report of all the eFiling and eService fees to date for the case.

Figure 16-2, Submissions Tab

C. Service Contacts Tab

The **Service Contacts** page (Figure 16-3) displays all of the service contacts for the case (Figure 16-3, B). This includes your firm's service contact(s) as well as other case counsel.

Click the Submissions tab (Figure 16-3, A) to reach this page.

Service contacts added to the case by your firm have a **Detach** button in the far right column (Figure 16-3, D). Click this button to remove the service contact from the case.

Service contacts that do not have a **Detach** button were added by another firm and eFileManager does not allow you to remove them from the case.

Click the **Attach Service Contact** button ((Figure 16-3, C) to add a member of your firm as a service contact for the case.

Click the Attach Non-Firm Service Contact button (Figure 16-3, D) to attach a service contact from another firm to the case. Only use this method if that counsel is not **available to be added to the service list from the eFileManager Public Service Contact List**.

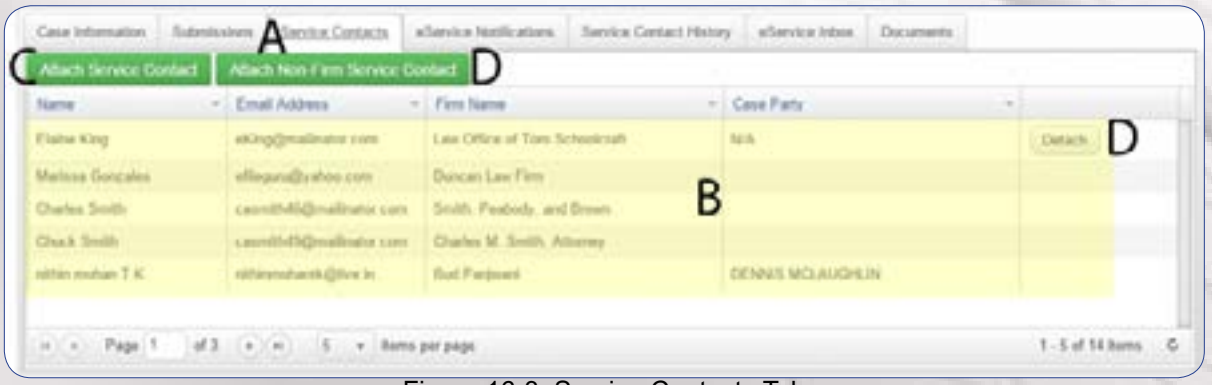


Figure 16-3, Service Contacts Tab

Anyone displayed on the Case Service Contact list above will be eServed when you submit for this case unless you specifically opt not to serve them.

D. eService Notifications Tab

On this page (Figure 16-4) your firm can add names of firm staff who are to receive copies of eService Notification sent to the firm service contacts for the case.

Anyone displayed on this list (Figure 16-4, B) will be sent a copy of the eService Notification email by FileTime. This is an exclusive feature of FileTime.

Add new recipients for the case by clicking the **Attach Case eService Notifications** button (Figure 16-4, C).

Click the **Edit** (Figure 16-4, D) and **Delete** buttons (Figure 16-4, E) to make the required changes to the existing list.

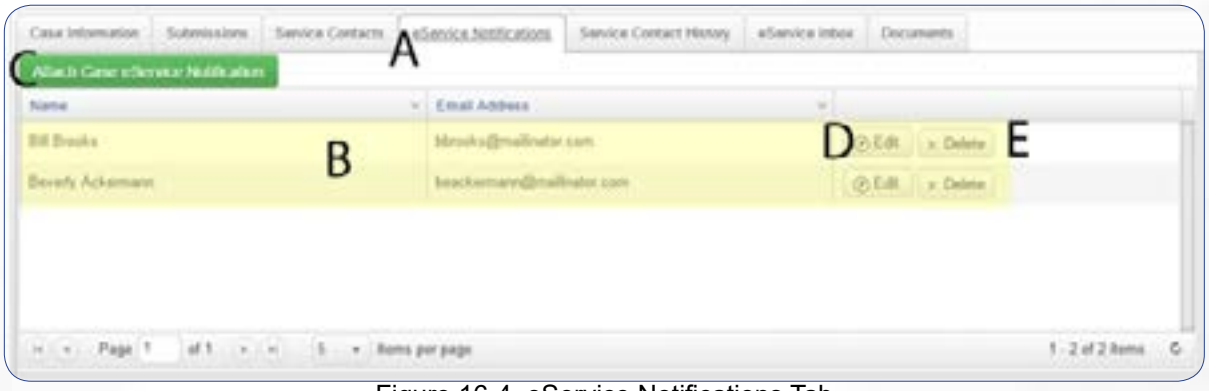


Figure 16-4, eService Notifications Tab

E. Service Contact History Tab

This page provides the eFileManager history of when service contacts were added to and deleted from the case.

This list is for all service contacts for all case counsel (figure 16-5, A), regardless of the service provider involved.

Click the **+** sign (Figure 16-5, B) in the far left column of a service contact to open the history for that service contact (Figure 16-5, C).

Figure 16-5, Service Contact History Tab

F. eService Inbox Tab

On this page you can view all eServices received by your firm for the case from other counsel (Figure 16-6, B).

Click the **View** button (Figure 16-6, C) to view the details of the service and to access the file stamped document.

Unlike the eFileManager Notification of Service email that gives you access to the service document for only seven days, you can access the service document in this Inbox for months, depending on your firm's options.

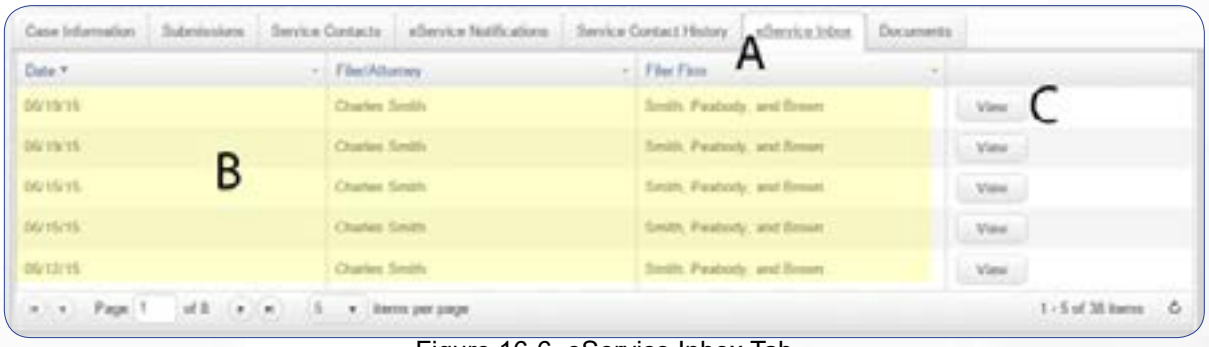


Figure 16-6, eService Inbox Tab

G. Documents Tab

On this page you can view and print all documents filed for the case by any counsel using FileTime.

After your click the **Documents** tab (Figure 16-7, A) you will see a listing of all the filed documents (Figure 16-7, B). Click the **Print** button to print a specific document.

Figure 16-7, Documents Tab

Chapter 17 - Document Guidelines

XVII. Document Guidelines

The document guidelines are largely defined in the Technology Standards report from the Judicial Committee on Internet Technology (JCIT).

A. Dimensions

Documents must be 8.5” by 11”. The FileTime document converter recognizes when your dimensions are off and will provide you a warning. It also provides you a ***Repair*** button, which if you click, will resize the document to 8.5” X 11”.

B. Orientation

Submitted documents must be *portrait* oriented, meaning 8.5” wide by 11” high. The FileTime document converter recognizes when your document orientation is off and will provide you a warning. FileTime also provides you a ***Repair*** button, which if you click, will reorient the document to *portrait*.

C. File Type

Only PDF documents may eFiled. However, you may upload a wide range of document types during the submission process and FileTime will convert them to searchable PDF files for you.

D. Maximum File Size

The eFileManager maximum file size is 35 MBs (Mega Bytes). This includes all documents in the submission.

E. No Security Features Allowed

eFiled documents cannot contain any security or feature restrictions including password protection or encryption.

F. Scanned Documents

All eFiled documents must be text-searchable PDF files. This means that scanned documents will have to be run through an OCR process to make them text-searchable. Furthermore, documents are to be scanned at 300 dpi to ensure the best conversion to a text-searchable PDF file. Be sure the scanner is set to black and white, NOT color. **NOTE**: While the standards specify 300 dpi for scanned docs, this makes a large file. Reducing the scanner resolution to 200 dpi creates a smaller file, if you are close to the 35 MB maximum size limit.

G. No Embedded Videos or Programming

eFiled documents may not contain embedded multi-media video, audio, or programming.

H. File Names

eFiled documents’ filename should contain only alphanumeric characters that are part of the Latin1_ General character set. No special characters are allowed and the length of the filename is restricted to 50 characters.

I. PDF Standard

PDF 1.4 (ISO 19005-1:2005- Revised as ISP /NP 19005-1). This standard specifies how to use PDF for long-term preservation of electronic documents and is applicable to documents containing combinations of character, raster and vector data.

Chapter 18

XVIII. Managing Notification eMails

The volume of notification emails from eFileManager and from FileTime can be overwhelming. Fortunately, every registered user in the eFiling system can manage which of the emails they receive and designate additional recipients of them.

The only exception to this general rule are the Notification of service emails. eFileManager has no provision for a service contact to opt out of receiving the notification of service emails. If you are a service contact for a case the eFileManager system must deliver the notification of service email to you in order for service to be complete.

Therefore, in this section we will address the management of two categories of email notifications:

1. All eFileManager notification emails except notification of service, and all FileTime notification emails,
2. eFileManager notification of service emails.

XIX. The notification of eMails (excluding the eFileManager Notification of Service email)

1. eFileManager Emails

- **Filing Accepted** - You receive this for every filings accepted by the clerk.
- **Filing Submitted** - You receive this after each filing is received by eFileManager from you.
- **Filing Returned for Correction** - You receive this when the clerk returns the filing for correction.
- **Service Undeliverable** - This means that the eService cannot be delivered to the intended recipient.
- **Filing Submission Failed** - You receive this when eFileManager fails the filing before it gets to the clerk. The reason is always a problem with one of more of the documents.

2. FileTime Notification Emails

- **Filing Submitted** - You receive this for each submission.
- **Filing Accepted** - This comes to you after a filing is accepted and it provides billing information.
- **Filing Failed** - You receive this when eFileManager fails a submission.
- **Filing Returned for Correction** - You receive this email, which contains information about how to re-efile and preserve the original submission date when the clerk returns a filing for correction.
- **Service Status** - This email updates you on the status of all the eService recipients after you eServe them.
- **Copy of Notification of Service eMail** - This email is sent by FileTime to the designated recipients for a case service contact.

B. All eMails Except the eFileManager Notification of Service

1. Select to Not Receive Specific Notification Emails

Individual users can opt out of receiving specific notification emails from eFileManager.

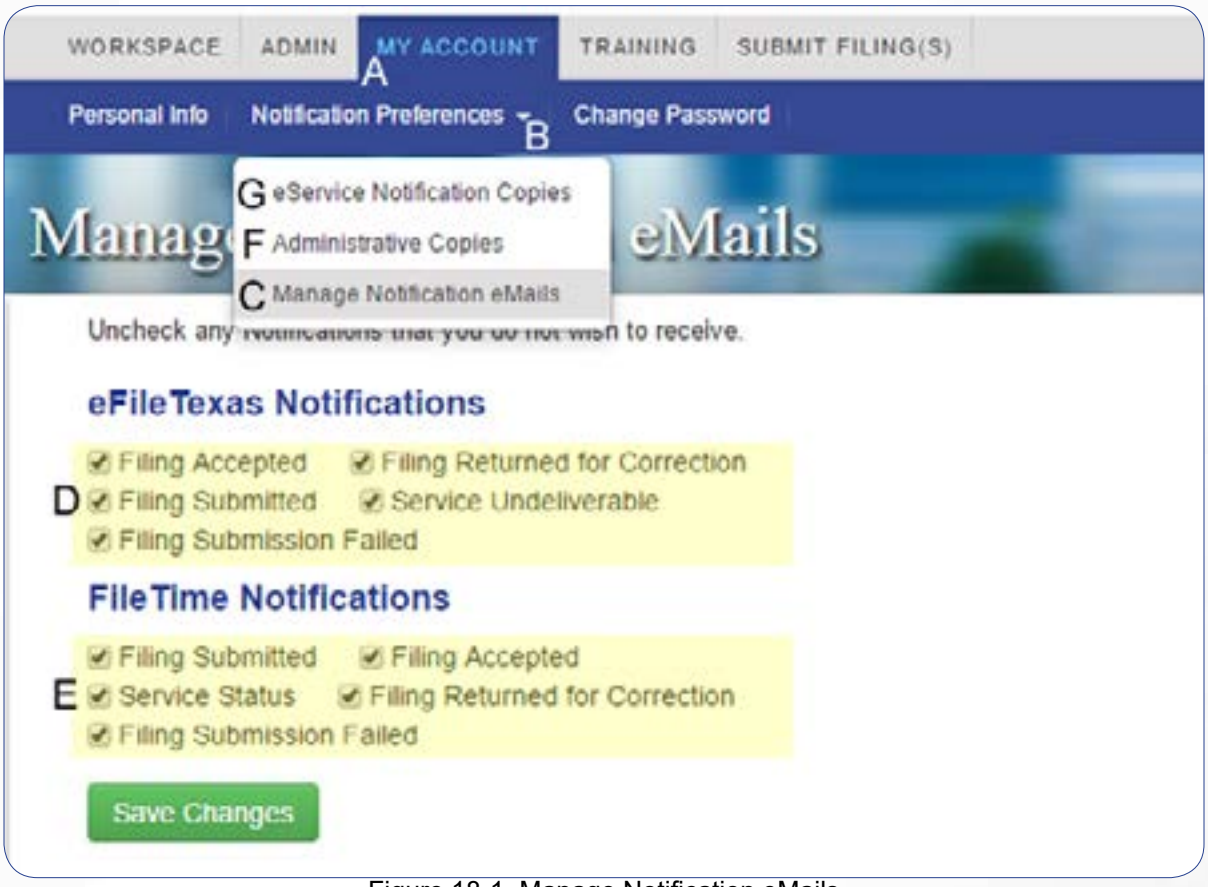


Figure 18-1, Manage Notification eMails

Click **My Account** on the top navigation bar (Figure 18-1, A).

Click the down arrow to the right of the **Notification Options** button (Figure 18-1, B).

Click **Manage Notification Emails** on the drop-down menu (Figure 18-1, C).

You are now on the **Manage Notification eMails** page (Figure 18-1).

In the **eFileManager Notifications** area (Figure 18-1, D) uncheck any notification email(s) you don't want to receive.

In the **FileTime Notifications** area (Figure 18-1, E) uncheck any notification email(s) you don't want to receive.

Click the **Save Changes** button before leaving this page.

You will not receive any of the notification emails you have unchecked.

2. **Have Copies of the Notification eMails for You Sent to Someone Else**

Now that you have stopped some of the notification emails sent to you, you might want to make sure that copies of them go to someone else in your firm. It could be your legal assistant or perhaps an administrator, or maybe both.

Here is how you do so.

Click **My Account** on the top navigation bar (Figure 18-1, A).

Click the down arrow to the right of the **Notification Options** button (Figure 18-1, B).

Click **Administrative Copies** on the drop-down menu (Figure 18-1, F).

You are now on the **Administrative Copies** page (Figure 18-2).

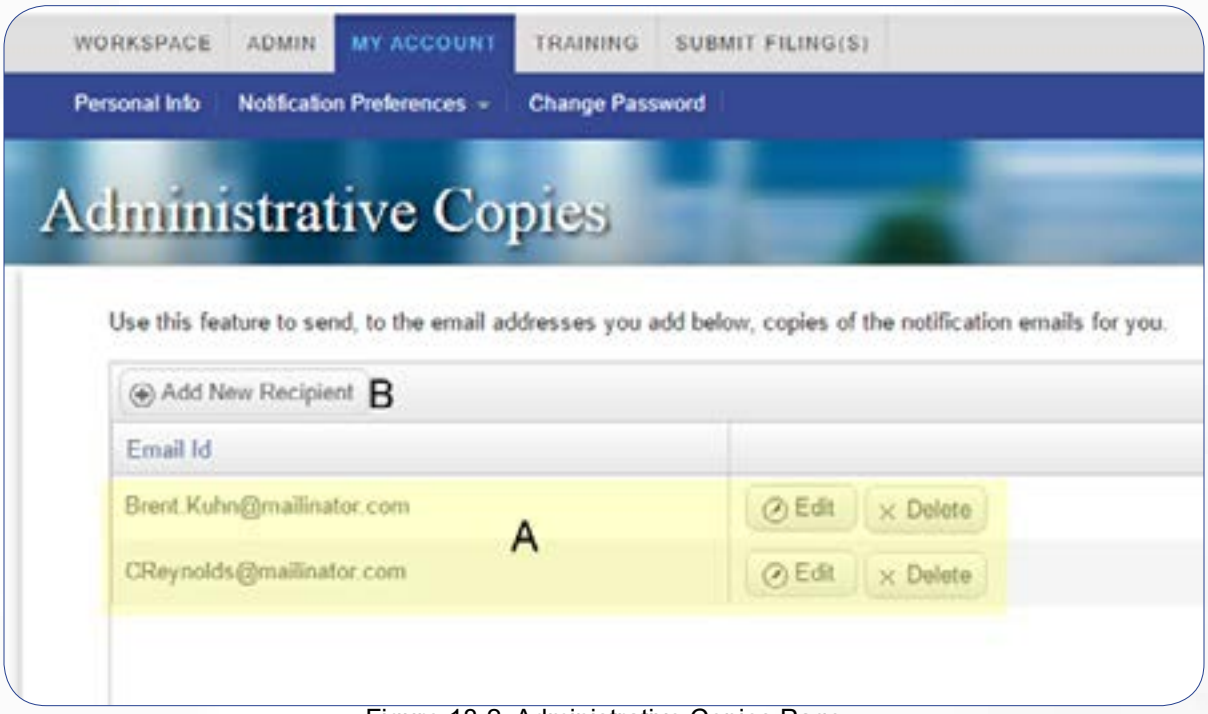


Figure 18-2, Administrative Copies Page

Anyone displayed (Figure 18-2, A) will be sent copies of all the Notification emails that would be directed to you. You can click the **Edit** and **Delete** buttons as required.

Click the **Add New Recipient** button (Figure 18-2, B) to add new recipients to the list.

3. **Add Additional eService Notification eMail Recipients**

FileTime enables you to add an unlimited number of additional eService notification email recipients for any eServices you are sent. This feature is unique to FileTime.

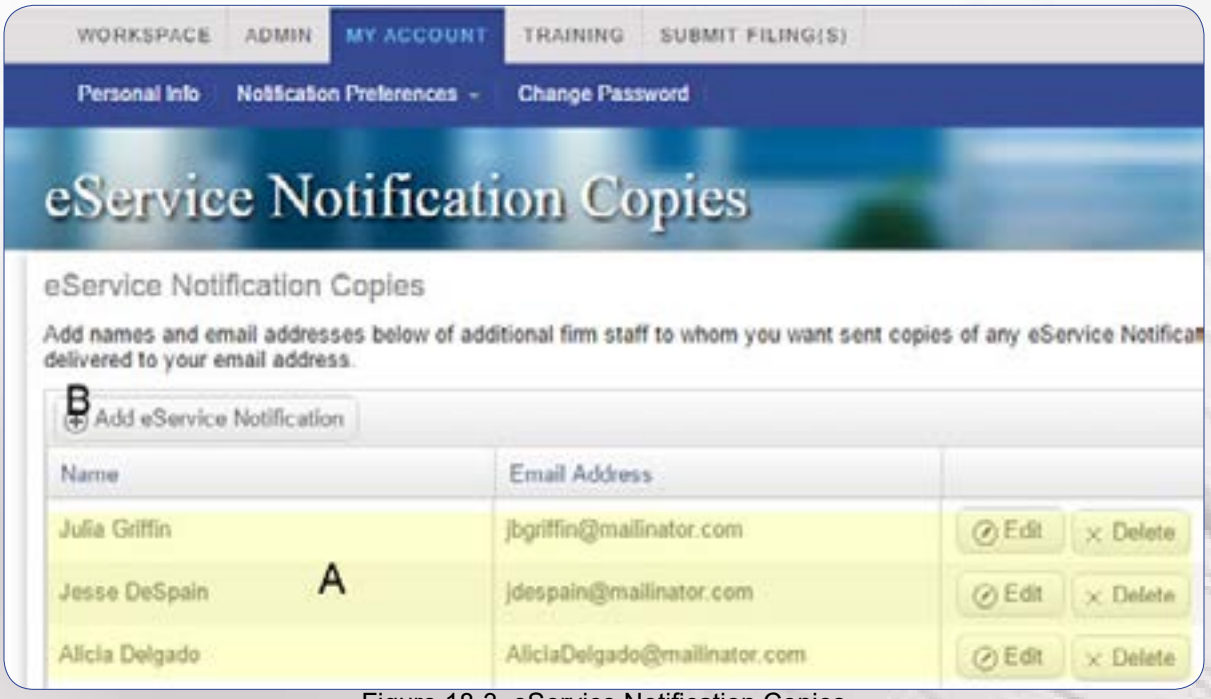


Figure 18-3, eService Notification Copies

This is your default setting. Any names and email addresses you add here will automatically

be sent copies of any Notification of Service emails sent to you by eFileManager. However, this can be over-ridden by the case specific eService Notification list (see section 4 below).

To add multiple eService notification recipients:

Click the down arrow to the right of the **Notification Preferences** button (Figure 18-1, B).

Click **eService Notification Copies** on the drop-down menu (Figure 18-G).

On the **eService Notification Copies** page (Figure 18-3) you will see all individuals (Figure 18-3, A), if any, already added to receive copies of eService Notification emails sent to you.

Click the **Add eService Notification** button (Figure 18-3, G) to add a new recipient.

Let FileTime guide you in adding the new recipient.

4. Customize the eService Notifications Copies List

In section 3 above we showed you how to create a default list of recipients to receive copies of eService notifications sent to a firm service contact.

However, FileTime also provides a for the firm to create a custom list of recipients for cases. When you create a custom list FileTime ignores the default list of recipients and sends the eService Notification emails only to the names on the case eService Notifications list.

This list over rides the default list created in section 3 above.

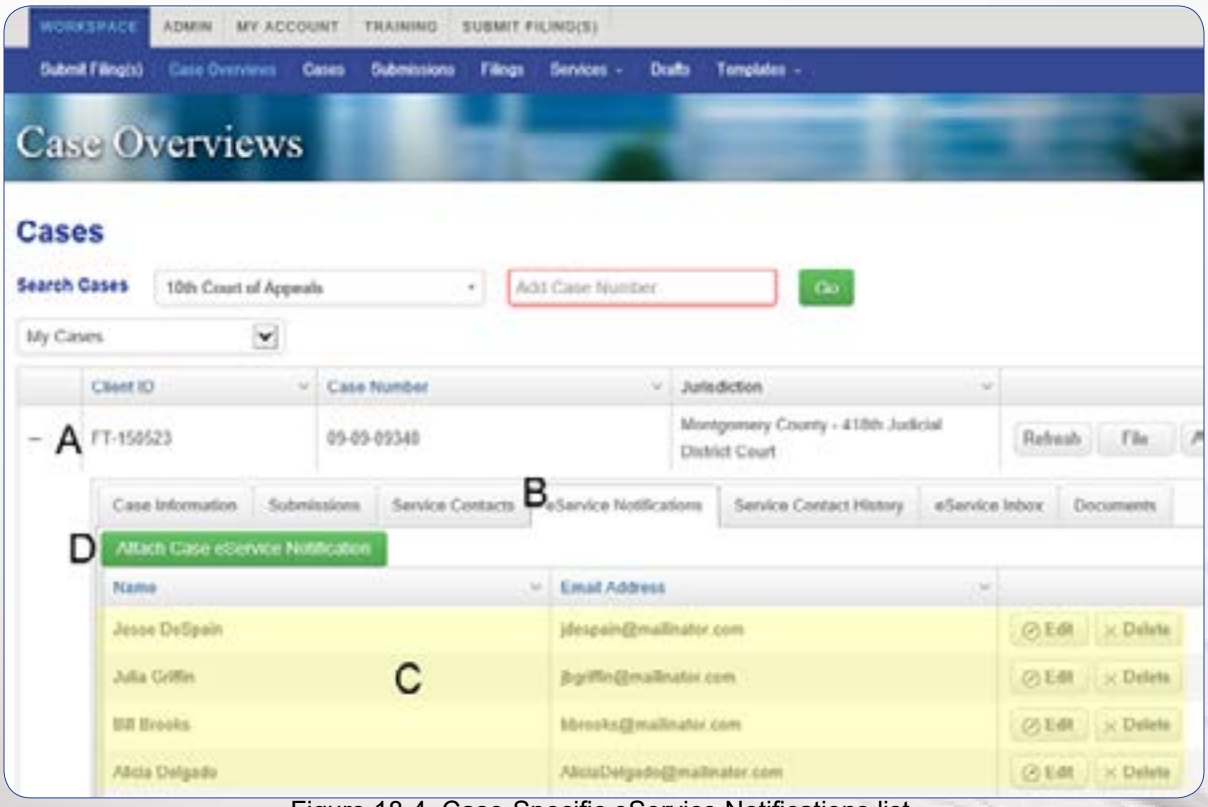


Figure 18-4, Case-Specific eService Notifications list.

Form the **Workspace** and while on the Case **Overviews** page, find the case for which you want to create a custom eService notification emails distribution list.

Click the **+** sign in the far left column so that it becomes a **-** sign (Figure 18-4, A).

The case tabs open below the case.

Click the **eService Notifications** tab (Figure 18-4, B).

Any recipients that your firm has already added for the case will display (Figure 18-4, C).

Click the **Attach Case eService Notification** button (Figure 18-4, A) to add recipients.

Click the **Edit** and **Delete** buttons for a recipient on the list as needed.

Again, when names are added to this list, only these individuals will receive notification of service emails for this case.

C. The eFileManager Notification of Service eMail

The eFileManager system is required to send the **Notification of Service email** to the email address of the intended recipient. For that reason, a service contact cannot opt out of receiving that email.

You can, however, establish rules some email client software, such as Microsoft® Outlook, that directs those emails into another email folder.

eFileManager provides an option for the firm to direct an additional Copy of the eService Notification email to another email address.

Only a firm eFiling administrator can perform this task and here how it is done.

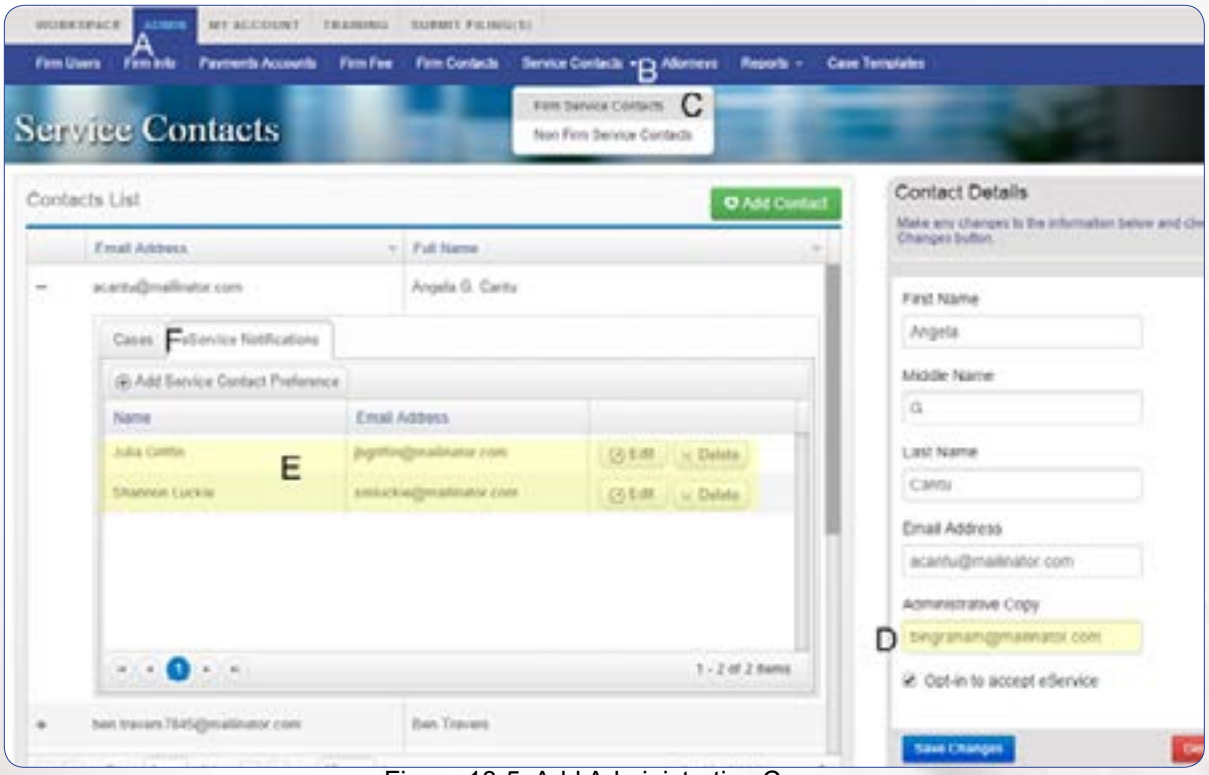


Figure 18-5, Add Administrative Copy

The firm eFiling Administrator logs into FileTime and clicks the **Admin** button (Figure 18-5, A), then Service Contacts ((Figure 18-5, B), the **Firm Service Contacts** (Figure 18-5, C) on the drop down menu.

The administrator is now on the **Service Contacts** page (Figure 18-5).

Find the firm service contact and click on the name to highlight it.

The **Contact Details** section opens in the right column for that person.

In the **Administrative Copy** field (Figure 18-5, D) enter an email address to which you want eFileManager to deliver a **copy of the Notification of Service email**.

Be sure to click the **Save Changes** button when done.

If you add an email address under the Administrative Copy area and also use the procedures in

section B.3. or B.4 above to have FileTime send a copy of the eService notification email to the same email address that person will receive two notifications.

For that reason we recommend that you use the FileTime options (section B.3. or B.4) as they allow you to direct an unlimited number of emails, giving you more flexibility.

Chapter 19

XIX. Managing Service Contacts and Service Recipients

FileTime enables you to manage your firm's case service contacts without going through a case filing process. You can also view counsel's eService contacts prior to submitting a filing for the case using the following process.

A. Manage Your Firm Contacts Outside of a Filing

After logging into your firm account, you will be, by default, on the **Case Overviews** page (**Figure 19-1, A**). You can also perform the following from the **Cases** page.

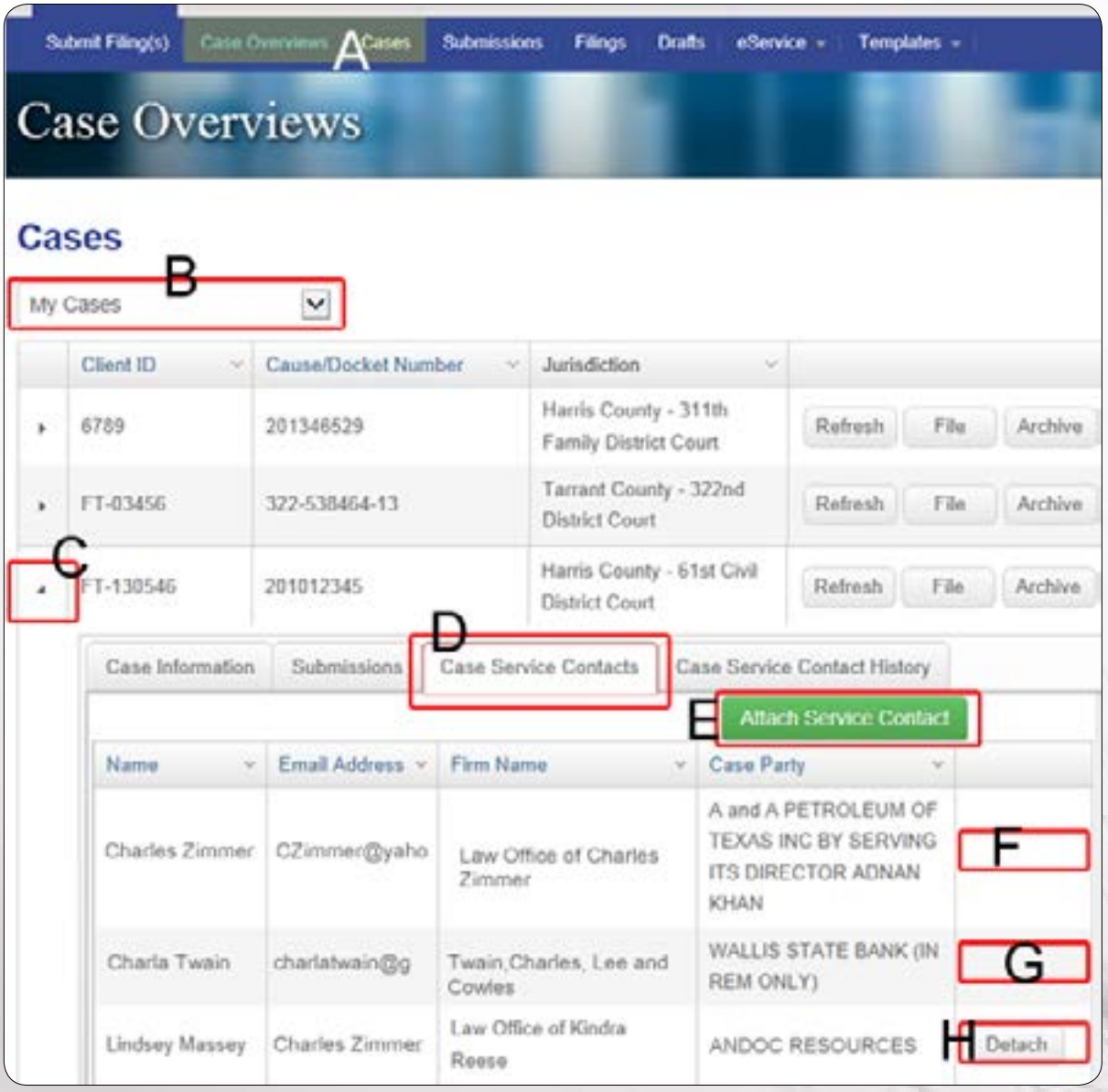


Figure 19-1, Case Service Contacts

By default, FileTime displays for you only your own cases (**Figure 19-1, B**). You can click the drop-down arrow to select to view all of your firm's cases or all the cases your firm has archived.

Find the case for which wan to view or manage the service contact list. Click the right-pointing arrow (**Figure 19-1, C**) to open the display tabs for that case.

Click the **Service Contacts** tab (**Figure 19-1, D**).

eFileManager only allows you to delete your firm's service contacts so any of your firm's service contacts that you have assigned to the case will show the **Detach** button (**Figure 19-1, H**) in the actions column.

Any case service contacts for counsel will be blank in the actions column (**Figure 19-1, F**).

Click the **Attach Service Contact** button (**Figure 19-1, E**) to attach a service contact for your firm to this case.

B. View the Case Service Contact/Recipient List before eFiling

FileTime enables you to view the service contact list for a case without going through the submission process. This enables you to quickly view who you will be able to eServe as you create the certificate of service on your document(s) to be eFiled.

Figure 19-1 displays for you the entire service contact list (your firm's service contacts for the case) and service recipients (counsel's service recipients for the case).

FileTime also enables you to quickly check the eFileManager Public Service Contact List for attorneys who have not yet opted in for eService for the case but which you can add to the case service list from the Public Service Contact List.

C. Check the Public Service Contact List

You may be able to add counsel to your case service contacts list even though he/she has not yet opted-in for eService on a case. If he/she is on the eFileManager Public Service Contact List you will be able to add him/her to the service contact list for the Case.

To check if counsel is on the Public Service Contact List:

After logging into FileTime you arrive on the **Workspace** tab (**Figure 19-2, A**) on the main navigation bar.

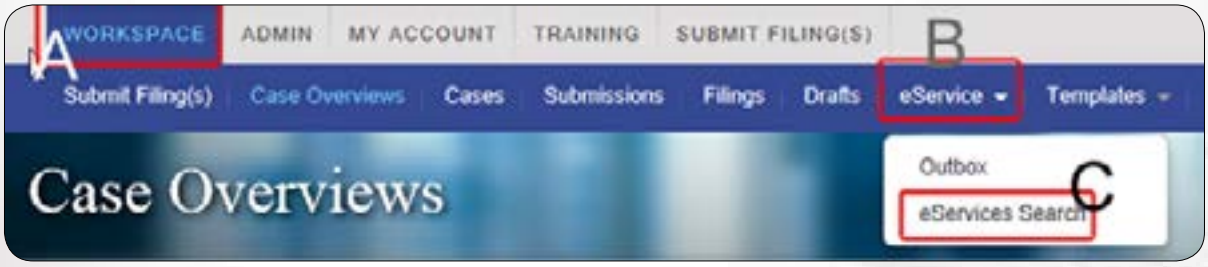


Figure 19-2, eService Options

Click the down arrow to the right of the **eService** (**Figure 19-2, B**) button on the sub-navigation bar.

Click the **eServices** button (**Figure 19-2, C**) on the drop-down list.

The **Search eService Contacts** page (**Figure 19-3**) opens.

Figure 19-3. Public Service Contact List Search

Enter ANY part of the **First Name** (**Figure 15-3, A**), and/or **Last Name** (**Figure 19-3, B**), and/or **Firm Name** (**Figure 19-3, C**).

The more information you enter the more you will narrow your search. For a common name such as Smith, you will want to want to narrow your search considerably. For a less common name you can enter less information. If you enter a firm name such as Smith Jones and McGuire, the search will not a firm name of Smith, Jones, and McGuire. However, had you entered only McGuire in the firm name, the search feature would return Smith, Jones, and McGuire.

Click the **Search** button (**Figure 19-3, D**).

The Search results are returned to you, (**Figure 19-4**).

Figure 19-4, Public Service Contact List Search Results

FileTime returns to you all people who are listed in the eFileManager Public Service Contact list whose information matches the search criteria you entered. In this case it returned everyone who first name contains cha, including Chad (**Figure 19-4, A**), Charles (**Figure 19-4, B**), Charley (**Figure 19-4, C**), and Michael (**Figure 19-4, D**). This search would also bring up names such as Charla, Michaela, etc.

If you find that too many names are returned, add more search criteria and click the Search button again. An example would be to add a part of the Firm Name, Parham for example (**Figure 19-4, E**).

If the name you are seeking does not display, that person is not in the Public Service Contact List or your search criteria was incorrect.

Chapter 20

XX. Fax Service Information

We provide free fax service for two of our billing plans. This enables you to quickly and easily serve counsel that has not submitted service contacts for the case. All you need to provide is the name and fax number for the recipient and let FileTime do the rest.

A. FileTime Fax Service Guidelines and Information

FileTime will send the fax service as quickly as possible but there can be a queue at busy times. We strongly suggest that you not wait until the last moment to send fax service.

We do not consider a fax service delivered unless all of the pages in the document(s) have been accounted for. You will be alerted to the failed fax service if even one page has not been delivered.

FileTime FaxService is only available with our pay-per-submission options:

- Gold Plan ($2.99) per submission - We allow you 100 pages of fax service per submission. To calculate the number of pages per submission, multiply the total pages in the submission by the number of counsel to be fax served.
- Platinum Plan ($3.99 per submission) - We allow you an unlimited number of pages of free fax service per submission.

B. Fax Service Status Notifications

You will receive a **Proof of Fax Service** email after a fax service has been successfully delivered.

If the fax service fails for some reason, you will also receive a **Fax Service Failed** email notification.

The Fax Service will contain a cover page with the standard TRCP language.

Additionally, when you view the **Filing Details** page for a filing containing a FileTime Fax Service you will find the following on that Details page:

- A **Print a Proof of Fax Service** button (**Figure 20-1, A**) and
- An overview of the Fax Service(s) status (**Figure 20-1, B**) (this will be at the bottom of the **Filing Details** page.

20-1, Proof of Fax Service

If the fax service fails, you will see the **Print Proof** button (**Figure 20-1, C**) replaced by a **Retry** button. Clicking this button will enable you to change the fax number and resubmit the fax service.

Chapter 21

XXI. Navigating and Customizing Your Views

We designed FileTime data grids to provide you powerful tools to find specific records and customize the columns to better meet your needs.

A. Firm/Personal Filter

You will find a filer like the one below (on Cases, Submissions, and Filings pages. Most of your firm filers will probably be interested in seeing only their own Cases, Submissions, or Filings. But, as a firm eFiling administrator you may want to click the Firm options in order to view actions firm-wide rather than just for yourself.

B. Sorting Grid Columns

Click the icon (Figure 21-2, A) to open the options shown in Figure 21-2.

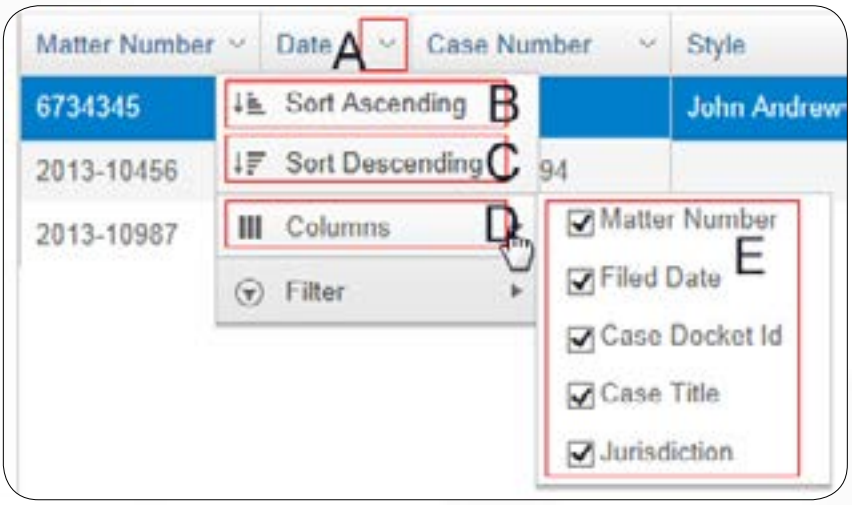


Figure 21-2, Grid Sorting and Display Options

Click the **Sort Ascending** button (Figure 21-2, B) to organize all the rows of data in that column in **Ascending** order.

Click the **Sort Descending** button (Figure 21-2, C) to organize all the rows of data in that column in **Descending** order.

C. Customizing Grid Columns

You can also control which columns display on your grids. The columns that are checked (Figure 21-2, E) will display. Let us know if you want to see other options and we can add them in a future update.

D. Searching in Grids

Use the FileTime filtering options to quickly find the specific case, name, email address, etc. in the appropriate grid column.

Clicking the **Filter** button (Figure 21-3, A) opens powerful search/filtering capabilities to you.

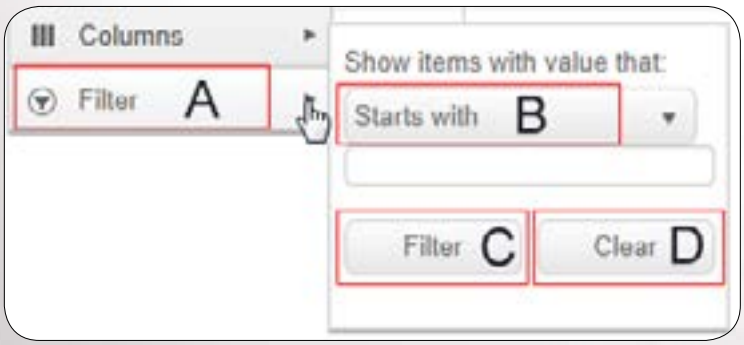


Figure 21-3, Searching the Column

1. **The Filter-type (Figure 21-3, B) button provides you four options:**

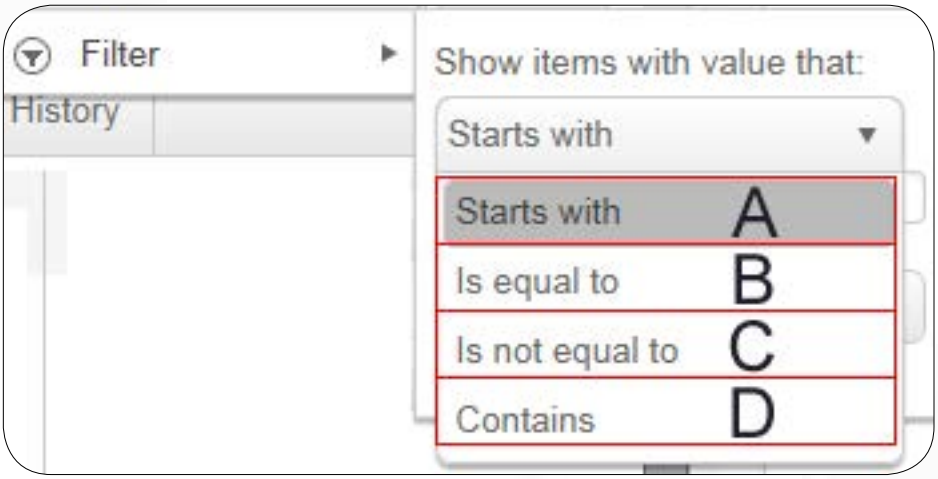


Figure 21-4, Filtering Options

- **Starts with (**Figure 21-4, A**)** - Select this choice and you will filter for any records that start with the data you enter in Figure 21-3, C.
- **Is not equal to (**Figure 21-4, B**)** - Select this option leave all records displayed on the grid except those that are equal to the data you enter into **C.**
- **Is equal to (**Figure 21-4, C**)** - Select this option and only records that are exact matches to what you enter into **C** will be displayed.
- **Contains (**Figure 21-4, D**)** - This option is often the most useful. Use is when you are not sure of the exact data you look up. This option causes FileTime to display and records with any part that matches the data you enter (Figure 21-3, C).

2. **Enter your search criteria in the Filter Criteria field (Figure 21-3, C).**

   Depending on the Filter-type you selected in the previous step and the data column in which you are performing this search, you may need to enter the complete Case Style or just a few numbers of the matter number, as examples.

3. **Click the Filer or Clear button**

   Click the **Filter** button (Figure 21-3, D) to perform the search/filter. You will be returned to the grid with only the record or records matching your search/filter being displayed.

   Click the **Clear** button (Figure 21-3, E) to clear all the selections you made above and start over.

E. Drill Down

The **Case Overviews** page contains a drill down option that enable you to dig down inside each case and see a great deal of the case information without going to a new page.

Figure 21-5, Drill Down for Case Information

Click the ▸ icon (Figure 21-5, A) in the left column of the row you wish to drill-down. That opens the case tabs for that case (Figure 21-5, B).

Click on each tab to view the information available:

- **Case Information** - Under this tab you will find basic information about the case.
- **Submissions** - You will find a list of submissions for the case under this tab. You will then be able to click to open the Details page for each submission.
- **Case Service Contacts** - Under this tab you can view all counsel for the case, including your firm's service contacts and other counsel listed as service recipients.
- **Case Service Contact History** - Under this tab you will be able to view the **Add and Delete** history for all the service contacts to this case.

In the example above, the **Submissions** tab is clicked and FileTime displays the single submission for this case (Figure 21-5, C).

F. Grid Navigator

When you have a large number of cases, submissions, filings, etc., they cannot all be displayed conveniently on one page.

The navigator at the bottom (Figure 21-6) of the grid provides ways to quickly view all the rows on the grid.

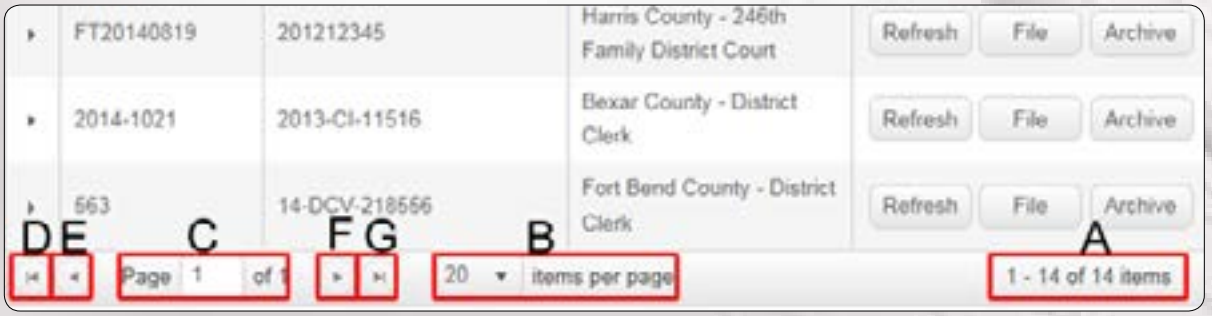


Figure 21-6, The Grid Navigator

- **Total Records** (Figure 21-6, A) - The records display shows which group out of the total

number of records (cases, submissions, filings, etc. - depending on which grid) are available.

- **Items per Page** (Figure 21-6, B) - You have multiple selections concerning how many rows you want FileTime to display.
- **Page Displayed** (Figure 21-6, C) - This area shows you which page of the total pages available is displayed. The number of pages available will vary by the number of records available and the number of records you want FileTime to display.
- **Go to Beginning** (Figure 21-6, D) - Click this button and you are returned to the page containing the first record.
- **Go Back One Page** (Figure 21-6, E) - Click this button to go back one page.
- **Go Forward One Page** (Figure 21-6, F) - Click this button to go forward one page.
- **Go to End** (Figure 21-6, G) - Click this button to go to the last page.

Chapter 22

XXII. Getting Assistance and Giving Feedback

We provide a number of training options for you.

A. Training

1. MCLE-Accredited eFiling Training

We provide a free one-hour Texas MCLE accredited eFiling training class nearly every week. It is delivered over the Internet so you can participate from your desk or on your tablet computer from the beach if you prefer.

Register here for a training class: **www.filetime.com/Training/Register**

B. Video Training

We provide numerous training videos an all phases of the eFiling submission process.

See those videos at: **www.filetime.com/Training/Videos**

C. Manuals

We have created several very useful guides in PDF format similar to this guide that provides detailed information for you.

- **eService Guide** - Everything you want and need to know about eService.
- **Administrator Guide** - Everything you want and need to know about administering your firm's FileTime eFiling account.
- **Searchable PDF Guide** - This guide explains what a searchable PDF is and how to create them

D. Contact Us

Click the **Contact Us** button at the top of the page for our phone number or to send us an email.

Click the **Chat** button at the top of the page to initiate a chat session with us.

E. Knowledge Base

You can find answers to a wide variety of questions asked by customers about eFiling and eService. Go to the **FileTime Knowledge Base** and find the answers to your questions. If your question is not there, post a question and we'll get back to you with the answer. **http://feedback.filetime.com/knowledgebase**

F. Feedback

We welcome feedback and particularly look forward to suggestions for improving our product or service. After logging into FileTime.com you will find a **Feedback and Support** tab on the extreme left margin of your monitor. Click it to open a window in which you can enter your feedback.