Before You Begin eFiling: <u>you</u> must <u>register</u> as a User with a <u>State Certified Service Provider</u> (EFSP).

New Electronic Filing of Court Cases

You must select an electronic filing service provider (EFSP) who will submit your documents on your behalf through the State of Texas' authorized electronic portal, which is known as

<u>EFileTexas.gov</u>.

Note: Depending on the Service Provider you register and set up your account with your setup and features may vary.
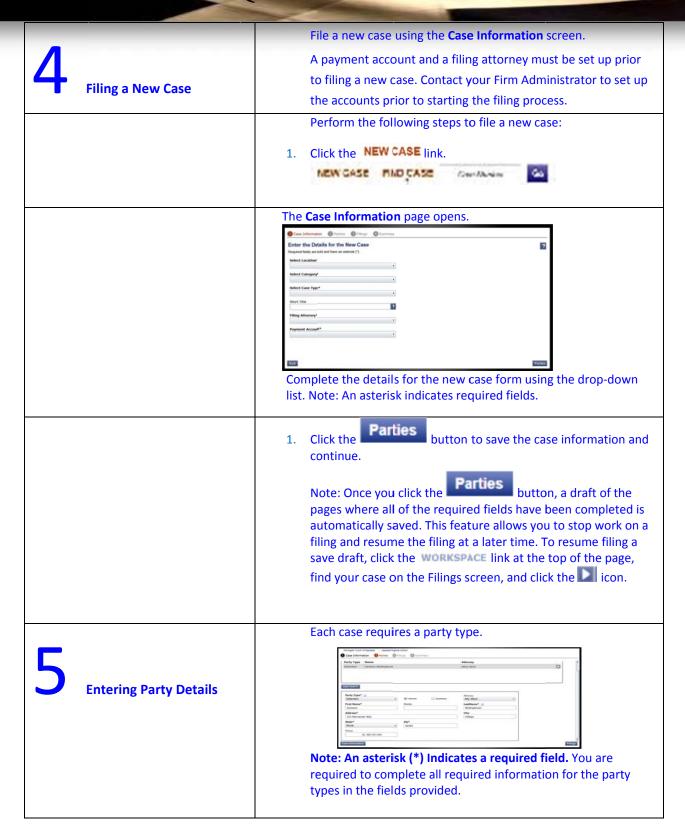
- Ensure all documents are completed and signed.
- Check the court rules for requirements on electronic filing.
- Once the preceding steps are completed, proceed to the home page of your service provider to submit a filing transaction.

Note: If you choose to utilize eFile.TXCourts.gov for your service provider below is a set of Quick-Reference Guide/Instructions to assist in successfully eFiling your court documents.

eFile Quick Reference Guide

Scanning Documents	In order to *upload* your documents to be eFiled you must first **Scan** the **documents** in using the scanning device attached to this workstation. 1. Place your document in the feeder tray facing the top of the document downward and towards the back of the scanner (See Image of the Scanner below). 2. Once the document is placed into the feeder you can press the control button (green icon) to start scanning.
	3. Wait as the document is uploading. 4. The document will automatically load into a folder set up on the desktop of the workstation titled **eFiled Scanned Documents.** 5. Once the document has been successfully scanned you can review it to verify that it scanned all pages and in the proper order. 6. In the event something is incorrectly scanned (page missing etc.), then simply go to the desktop of the workstation and double click the icon to delete the PDF image. 7. Once you have all the documents in that you plan on electronically filing you can proceed to logging into to your Service Provider to begin logging in and filing the documents electronically.

75-page auto document feeder supports 8.5" x 36" to business and ID cards

10 user-definable scan jobs displayed on a 2 line x 16 character LCD

4 control buttons - job select, scan and cancel

Dual CCD sensors scan both sides in one pass

ReadyScan LED light source No warmup time, less power consumption and no Mercury

USB 2.0 interface and power switch (on rear)

Output tray

Steps	Description
1 Logging into eFileTexas. gov	Perform the following steps to log in: 1. Go to your eFileTexas.gov home page. 2. You can login by using your-email address and password provided during the registration process. You must log into be able to use eFileTexas.gov. 3. Enter your e-mail address and password (case-sensitive) in the fields provided. Email Address _____ Password _____ ☑ Keep me logged in ⓘ LOGIN Forgot Password? | Register Now
	4. Select the ☑ **Keep me logged in** ⓘ check box to stay logged into eFileTexas.gov. This keeps you logged in to eFileTexas.gov until you click the logout link to logout.
	5. Click the button. **LOGIN** **Note: After several failed Attempts to log in to the system, your account is locked. You can unlock your account by using the Forgot Password? Option and reset your password without having to contact the Firm Administrator if a security question is associated with the account.**
	6. Once you have successfully logged in, you can begin to use eFileTexas.gov.
2 Case, Advanced and Advanced Person Search	**Case Search** 1. Search for a case by selecting a location using the drop-down list, and entering the case number assigned by the courts or by entering the party name in the search field. **Case Search Fields** NEW CASE All Locations ▾ ⁇ _____ ⁇ Go *Advanced Search*
	Advanced Search 1. The **Advanced Search** feature provides the ability to search by party name using a person or a business name. The **Advanced Search** feature includes the ability to filter a search by party name based on the location or the case type.

	Performing an Advanced Search by Person.
	An asterisk (*) indicates a required field. **Note: Color themes may vary by site.**
	2. Click the **Advanced Search** link in the **New Case** section at the top of the screen to open the *Advanced Search* dialog box. The *Advanced Search* dialog box opens.
	3. Select the **Person** check box. Note: Check boxes are configurable. This option may vary by site. For example, some clients may only have businesses in CMS, so a check box is not required.
	4. Complete the fields in the *Advanced Search* dialog box. 5. Click the **Search** button to continue or the **Cancel** button to cancel. Click the **Reset** button to reset the form. 6. The search results are displayed.
3 **Filing into an Existing Case**	Filing into and Existing Case. You can file into an existing case once you have initiated a case. The procedures that follow describe the three different ways to access a case to file into the case.
	Perform the following steps to access your case to begin a subsequent filing: 1. Click the **WORKSPACE** link at the top of the page. **Note: This will take you to the Filings screen**
	2. Locate your case on the **Filings** screen. 3. Click the icon to file into the case. 4. Complete the 7 filing details, page4.

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4 Filing a New Case	File a new case using the **Case Information** screen. A payment account and a filing attorney must be set up prior to filing a new case. Contact your Firm Administrator to set up the accounts prior to starting the filing process.
	Perform the following steps to file a new case: 1. Click the NEW CASE link.
	The **Case Information** page opens. Complete the details for the new case form using the drop-down list. Note: An asterisk indicates required fields.
	1. Click the **Parties** button to save the case information and continue. Note: Once you click the **Parties** button, a draft of the pages where all of the required fields have been completed is automatically saved. This feature allows you to stop work on a filing and resume the filing at a later time. To resume filing a save draft, click the WORKSPACE link at the top of the page, find your case on the Filings screen, and click the ▶ icon.
5 Entering Party Details	Each case requires a party type. **Note: An asterisk (*) Indicates a required field.** You are required to complete all required information for the party types in the fields provided.

	Perform the following steps to enter the details for the parties involved in the case: 1. Click the **Parties** button from the **Case Information** screen to enter the party details for the case.
	2. Choose the party type by selecting either **Plaintiff** or **Defendant** under the **Party Type** column. You can also select the party type using the drop-down menu in the **Party Type** field.
	3. Enter the party information in the fields provided. If you want to add another party to the filing, click the **ADD PARTY** button, and enter the party information in the required fields.
	4. Click the **Filings** button to save the party details, or click the **Case Information** button to return to the previous screen.
6 **Entering Filing Details**	Entering Filing Details. The **Filing Details** screen allows you to enter the filing details and calculate the fees associated with the filing.
	Perform the following steps to enter the filing details for the case: 1. Click the **Filings** button from the **Parties** screen to enter the filing details. 2. Select the filing code using the **Select Filing Code** drop-down menu. 3. Select the **eFile** check box to select the e-file option.
	4. Enter a brief description of the filing associated with the filing code previously selected in the **Filing Description** field 5. Type a reference number of your choice that you can refer back to for this filing in the **Reference Number** field. 6. Select the **Lead Document** for this filing.

	7. Click [Click to Browse or Drag Files Here] to select a **Lead Document**. This opens Windows Explorer on your computer. 8. Select a document to upload from the files on your computer.
	9. Click [Open] to attach the file. 10. Wait as the attachment uploads. 11. Type a description of the uploaded attachment. 12. Select a security option for the attachment. 13. To delete the uploaded attachment, click the [X] icon.
	Note: For each documented that requires a separate file stamp at the front page of each document then the document would be required to be file as a Lead Document 14. Select the **Attachments** to upload for this filing. 15. Click [Click to Browse or Drag Files Here] to select an attachment. This opens Windows Explorer on your computer. 16. Select the attachments to upload from the files on your computer. **Note: Multiple documents Can be uploaded as attachments simultaneously.**
	Uploading an Attachment 17. Click [Open] to attach the file.
	18. Wait as the attachment uploads. 19. Type a description of the uploaded attachment. 20. Select a security option for the attachment. 21. To delete the uploaded attachment, click [X] located under **Confidential**. 22. Enter the **Filing Comments** for the court reviewer to read.
	23. Click the [Add Another Filing] button to add more documents to this envelope. 24. Review the filing **Fees** located on the right side of the screen. **Note: Your credit card is authorized when submitted; however, the transaction fees will not post to the credit card account until the court accepts the filing. Once the filing is accepted, the total filing fee to be submitted for**

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	the filing is displayed.
	25. Select a payment account to use to pay the filing fees. 26. Select the party responsible for the filing fees. 27. Selecta filing attorney. 28. Click the ![Summary] button to save the filing details when you are done, or click the ![Parties] button to return to the previous screen.
7 Review Envelope and Filing Summary	Review Envelope and Filing Summary. The **Envelope and Filing Summary** screen displays the information you entered throughout the filing process along with the filing fees and payment information.
	Envelope and Filing Summary Screen
	1. Carefully review the information on the screen to ensure all information entered is correct. 2. Click the ![Edit] button to change any information on the screen, if needed. 3. Click the ![Submit] button when you are done to submit your filing, or click the ![Previous] button to return to the previous page.
7 Technical Support	The Technical Support Team is available to assist all users by calling 855.839.3453 Monday through Friday between the hours of 7 a.m.to9 p.m. Central Time. You can also contact a Technical Support Representative with your questions by sending an e-mail to efiling.support@tylertech.com or by using the Chat option.
8 Delete all Files after Scanning and Uploading	Please note after the documents have been successfully efiled then you must go back to the computer desktop and click the Delete ![gear icon] Icon to remove all documents that

Documents to be eFiled	been saved and uploaded.

eFile Quick Reference Guide

Familiarize yourself with the filing icons **Filing Icons (see table below)**

Icon	Description
	Deactivate the user, un-bookmark the case, delete the party, delete a filing, delete a draft envelope, and delete a template.
	Manage your service contacts.
	View the service contact, filing, or template details.
	File into the case.
	Bookmark the case.
	Resume the draft envelope.
	Cancel the filing.
	Copy the envelope or filing.
	Add template to My Favorites folder.
	Edit a template in the workspace, or link a service contact to a case.
	View attached case list.
	Replace service contacts.