Table of Contents

Chapter 1

I. Overview of the Firm eFiling Admin Functions

A. Role of the Firm eFiling Admin

The Administrator role is critical in the eFileCA system. As a Firm eFiling Administrator you will:

- Set up the firm account.
- Determine all the firm settings, without which no filings can be submitted by firm members.
- Manage all firm eFiling users including registration, approving, assigning roles, resetting forgotten passwords, and deleting departed firm members.
- Generate eFiling reports firm-wide or for specific filers, cases, clients, etc.

B. Design of the eFileCA System

This guide will probably make more sense if you understand the design and flow of the eFileCA system.

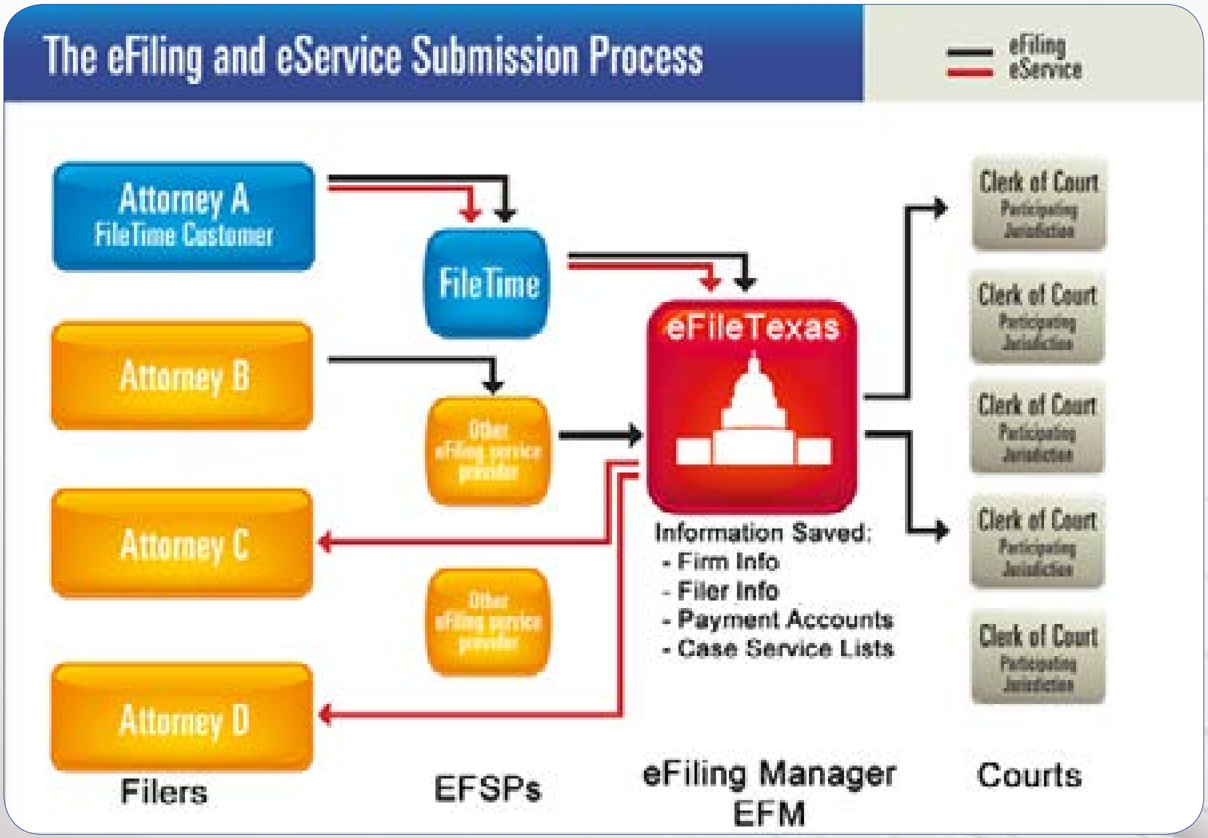


Figure 1-1, The Design and Flow of the eFileCA System

When you login as Attorney A, or on behalf of attorney A, you are logging into the eFileCA system through FileTime, or whichever servicer provider through which you are logging in.

You next enter the filing and/or eService information.

When the submission is to your satisfaction, you click the **Submit** button at the end of the eFiling data entry process and FileTime submits your data to eFileCA.

C. eFilings

eFileCA:

- Pre-authorizes any submission fees with your credit/debit card issuer,
- Processes your submission document(s) to ensure they meet the PDF standards, and
- Forwards the filing data and documents on to the appropriate jurisdiction.

The Clerk of Court reviews your eFiling and accepts it as is or returns it for correction.

When a filing is accepted, eFileCA then:

Submits the final billing for the submission to your credit/debit card issuer,

Notifies FileTime, and

Sends the **Notification of Acceptance** email to the filer.

D. eServices

The flow of an eService is slightly different.

When you click the Submit button, FileTime submits all the eService data to eFileCA as with an eFiling.

eFileCA then:

- Sends **Notification of Service** emails directly to each of the service recipients and
- Notifies FileTime of the service to any of our customers.

Chapter 2

II. FileTime Overview

When you first login at www.filetime.com you are automatically directed to the **Workspace** area. You also automatically see the top navigation bar (Figure 2-1, A) and the sub-navigation bar (Figure 2-1, B).

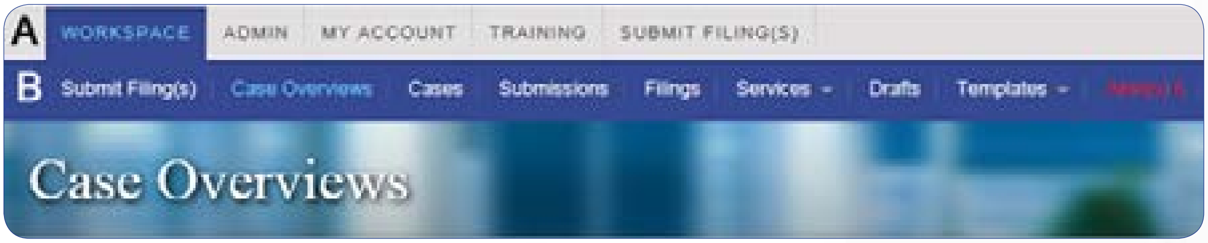


Figure 2-1. Top Navigation Bar

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, optin to the Public Service Contact List, 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. Submit Filing(s)

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

2. Case Overviews

You will be automatically taken to the **Case Overviews** page (Figure 2-2) when you login.

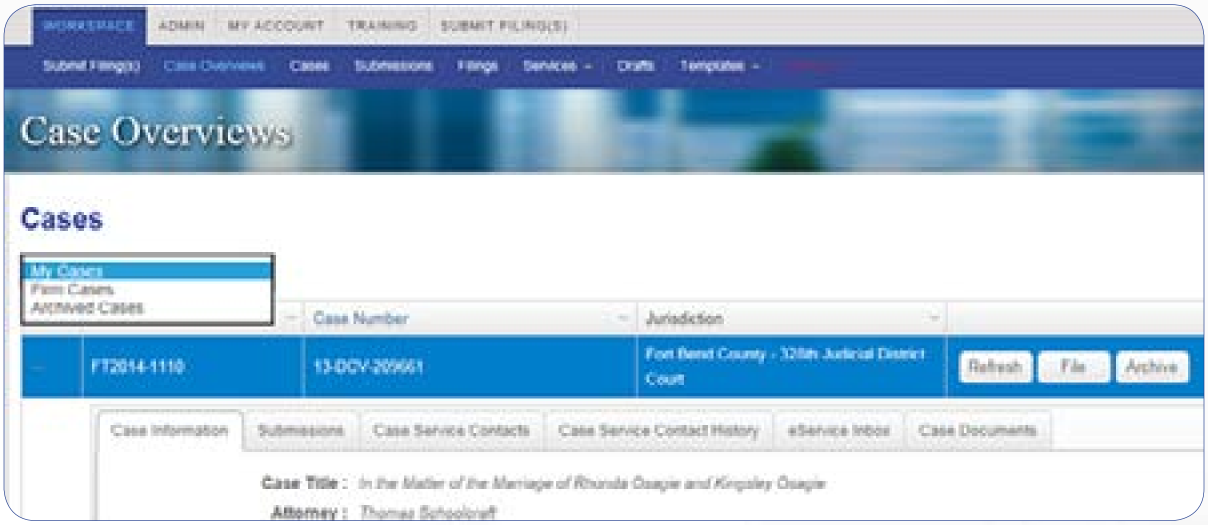


Figure 2-2, Case Overviews Page

From this page you can view firm cases, submit eFilings for firm cases, archive firm cases, etc.

Be sure to click **Firm Cases** on the Cases drop-down menu if you want to view Cases firm-wide rather than cases in which you have personally eFiled.

3. Cases

The **Cases** page (Figure 2-3) provides you with different options to:

- View existing cases in which your firm members have already eFiled through FileTime - they will display on the grid, and
- Search the eFileCA for cases for which your firm filers have not yet submitted filings through FileTime - which do not display on the grid.

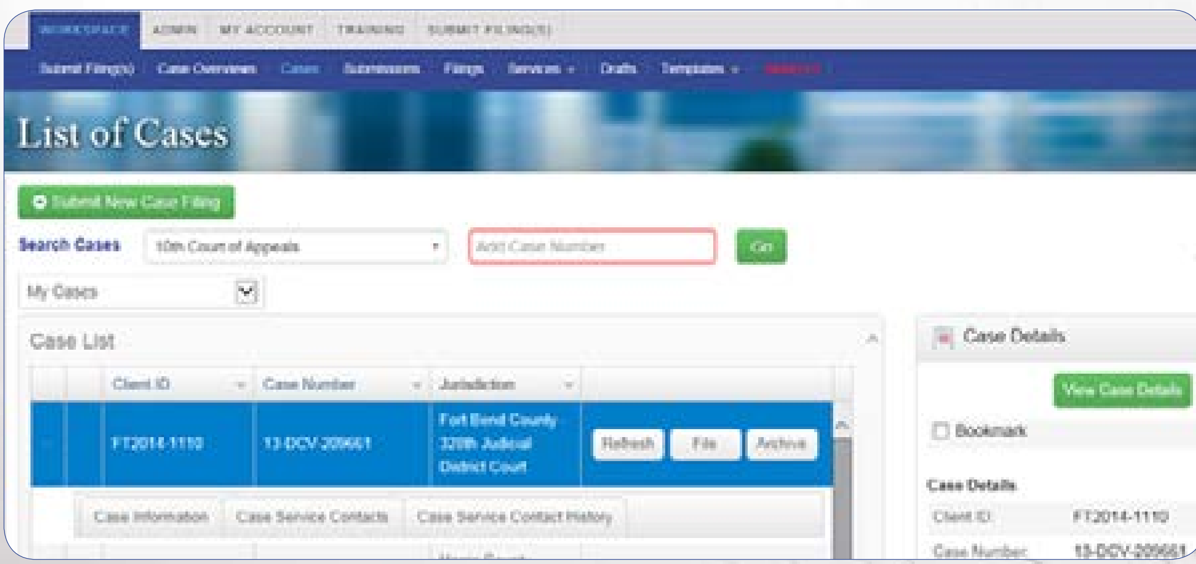


Figure 2-3, Cases Page

From this page you can view firm cases, submit eFilings for firm cases, archive firm cases, etc.

Be sure to click **Firm Cases** on the Cases drop-down menu if you want to view Cases firm-wide rather than cases in which you have personally eFiled.

To search for existing cases not on the grid, select the appropriate jurisdiction, enter the case number and click the **Go** button.

NOTE: New cases do not display on the **List of Cases** or the **Case Overviews** pages until the clerk had accepted the initial filing and assigned a cause/case number.

4. **Submissions**

You will find all of your firm's eFiling and eService submissions on the **Submissions** page (Figure 2-4). After finding a specific submission you can view and print details about the submission, cancel a submission that has not yet been opened by the clerk for review, resubmit a returned for correction submission, and archive cases.

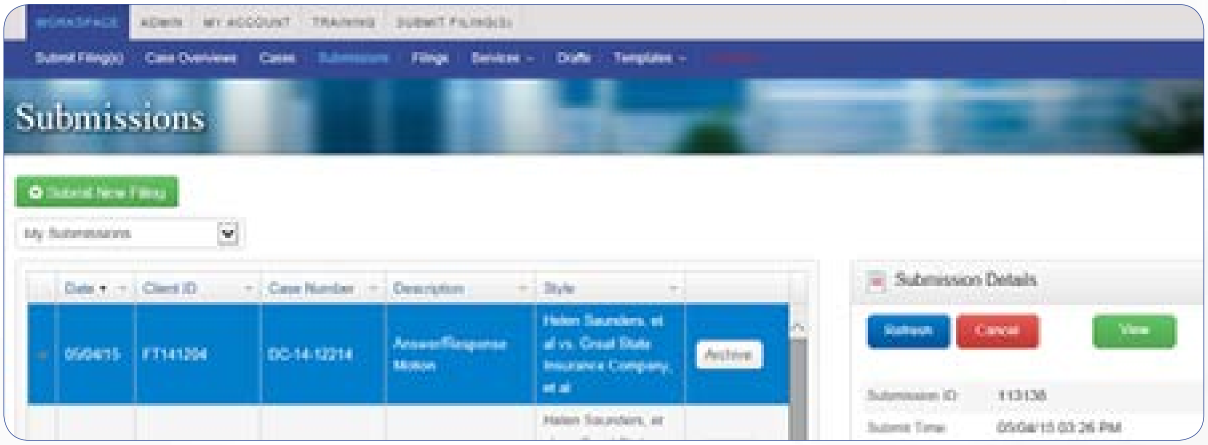


Figure 2-4, Submissions Page

5. **Filings**

A submission can contain multiple filings and you can view all individual filings on the **Filings** page (Figure 2-5). Additionally, you can view and print the filing details, resubmit a **Canceled** filling, and archive filings for inactive cases.

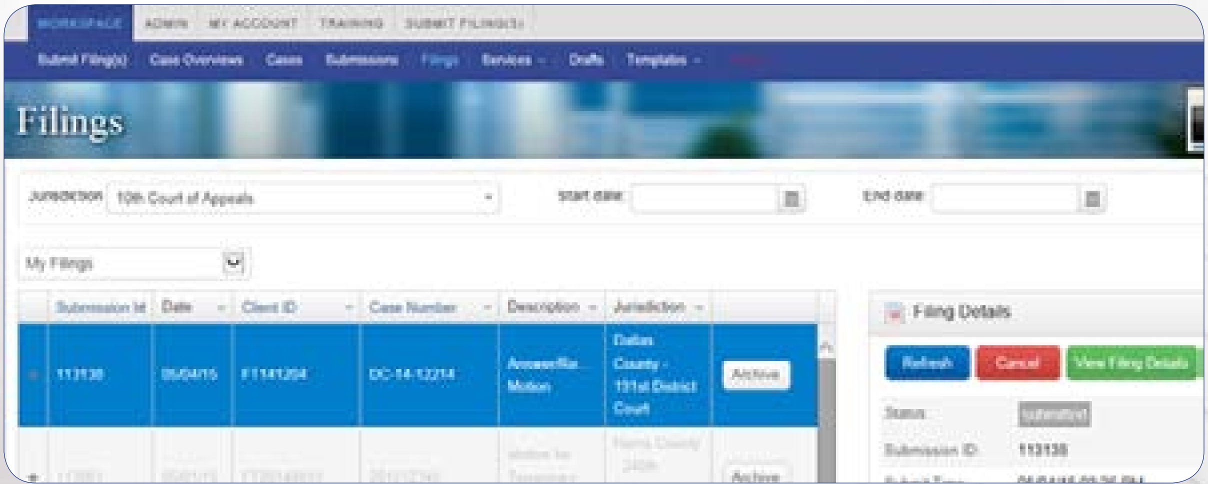


Figure 2-5, Filings Page

Above the grid there are options to filter by jurisdiction and/or by date range.

After finding a specific Filing you can view and print details about the filing, cancel a filing that has not yet been opened by the clerk for review, resubmit a returned for correction filing, and archive the filing.

6. **Services**

Under the **Services** button you have the following options under the drop-down menu:

Figure 2-6, Services Section

- **Inbox** - Go here view and print eService details and service documents served to you or other firm attorneys by counsel.
- **eService Outbox** - Go here to print **Proofs of Service** that you eServed counsel with the submission.
- **Fax Service Outbox** - Got here to view the status of FileTime Fax Services and also to print **Proofs of Fax Service**.
- **eService Search** - Use this feature to determine if counsel is on the eFileCA **Public Service Contact List**, enabling you to know in advance of an eFiling whether you will be able to add him/her as an eService Recipient for the case.

FileTime saves the service documents in the Inbox for at least six months whereas eFileCA makes them available from the Notification of Service email for only seven days.

7. **Drafts**

You can save an unfinished submission as a draft at any point in the submission process and they are saved on the **Drafts** page (Figure 2-7). You can also delete Drafts by clicking the red trashcan icon in the Draft Details section.

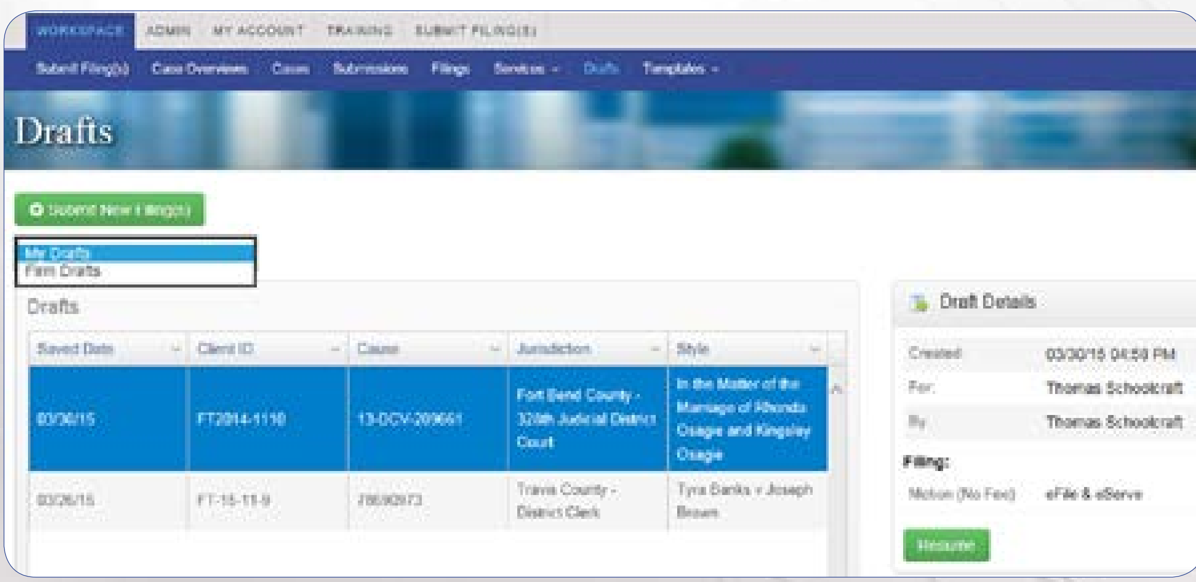


Figure 2-7, Drafts

Return to the **Drafts** section at any time to resume the submission process.

8. Templates

Under the **Templates** button you have the following options under the drop-down menu (Figure 2-8):

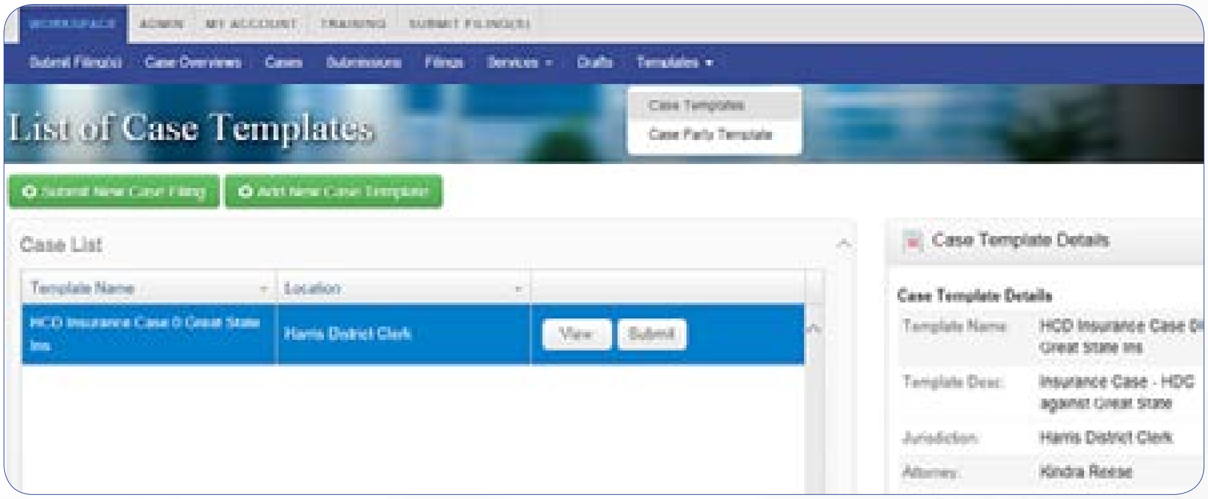


Figure 2-8, Templates Section

- **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. Alerts

eFileCA sends notifications of Failed filings, returned for correction filings, and failed eServices by email to the filer by email.

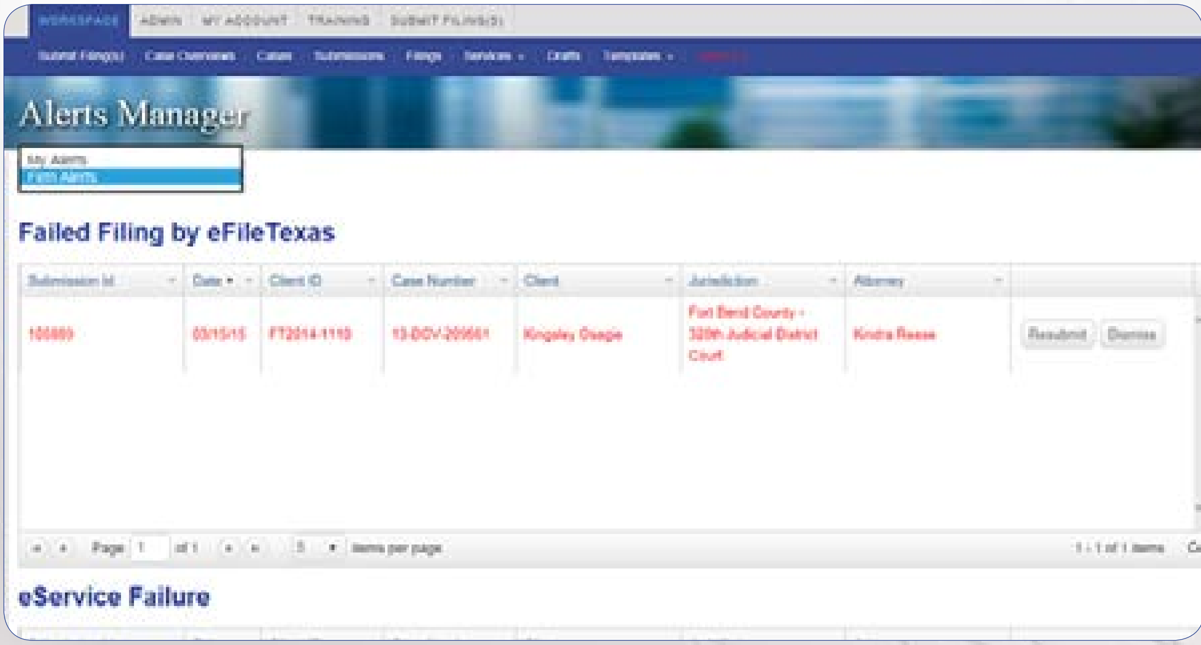


Figure 2-9, Alerts Manager

The blinking Alerts button on the sub-navigation bar notifies you that alerts are available for you on the Alerts Manager page.

C. Admin Sub-Navigation Bar

The Admin sub-navigation bar (Figure 2-10) displays when you click on the **Admin** button.

The Admin button is only visible to firm users with a role of **Administrator**.

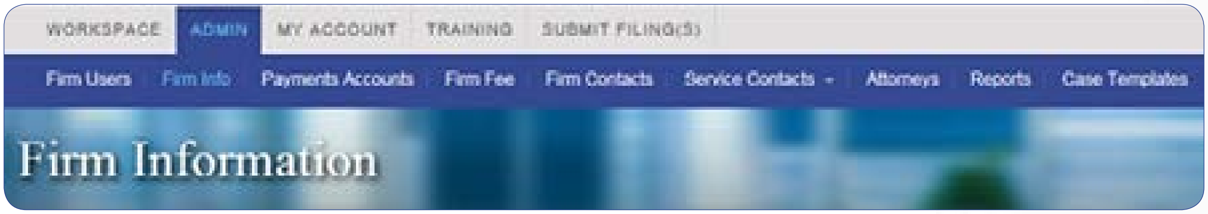


Figure 2-10, Admin Sub-Navigation Bar

1. Firm Users

Manage all your firm users on the **Firm Users** page (Figure 2-11). You can add new users, opt your firm attorneys into the eFileCA 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, change users' email address in the eFileCA system, and more in this area.

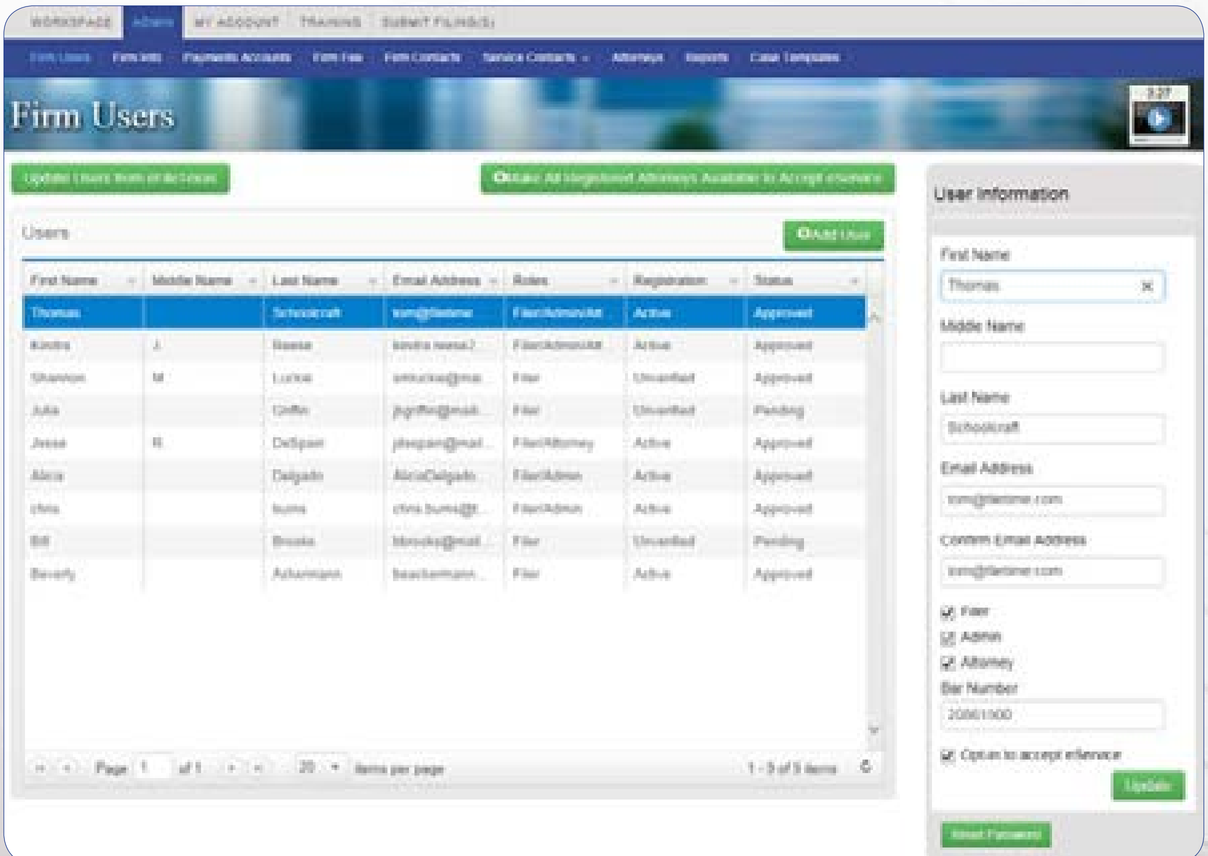


Figure 2-11, Firm Users

Read more detail about managing your firm's eFiling users in **Chapter 3**.

2. Firm Info

Go to the **Firm Information** page (Figure 2-12) to:

- Update your firm information in the eFileCA system,
- Make it mandatory that your firm filers enter a Client ID number for every submission,

- Request that your firm be made sales tax exempt (if you are a governmental institution or other sales tax exempt organization), and
- Enable firm attorneys and staff to self-register with the eFileCA system through your firm account.

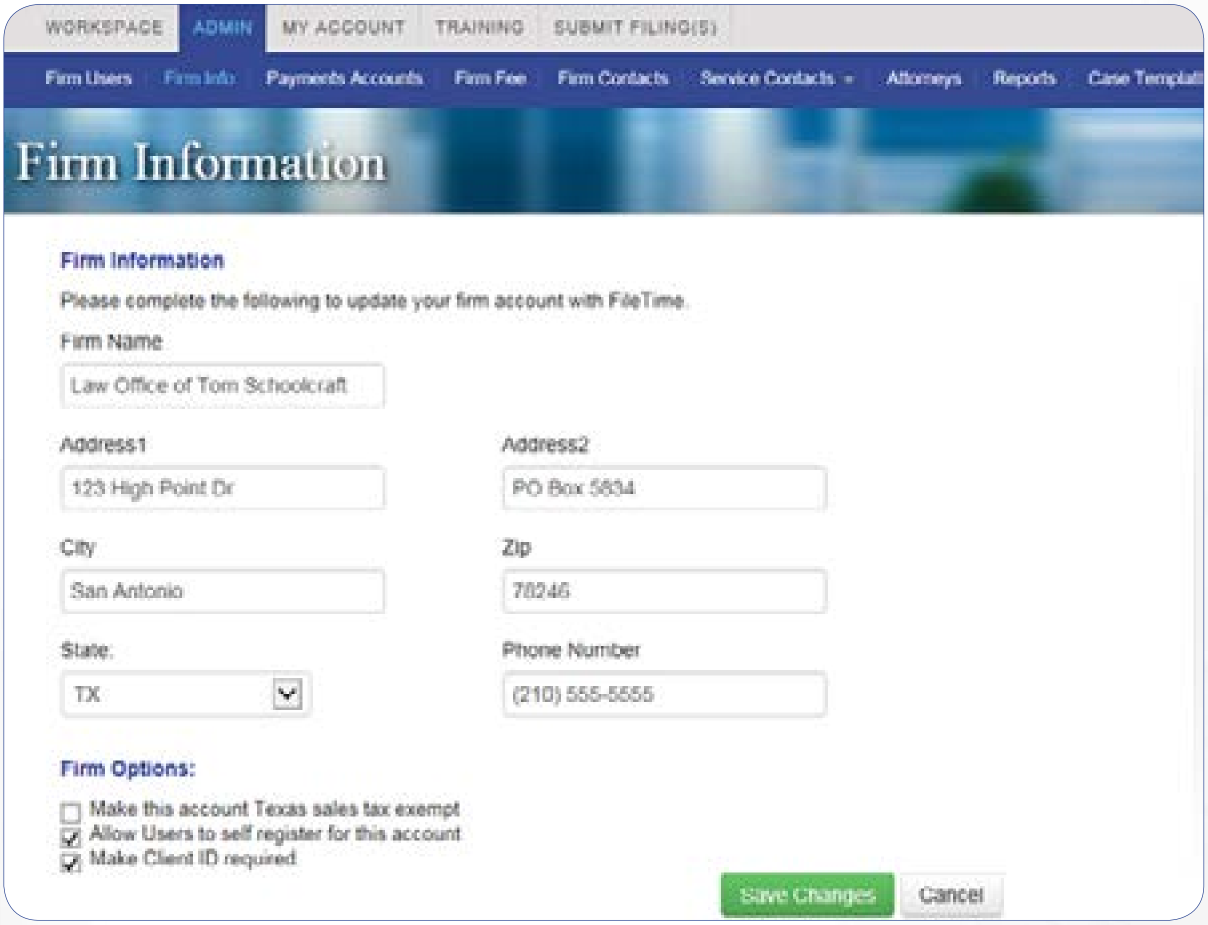


Figure 2-12, Firm Information Page

3. Payment Accounts

You must create at least one firm **Payment Account** (Figure 2-13) in order for your firm members 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.

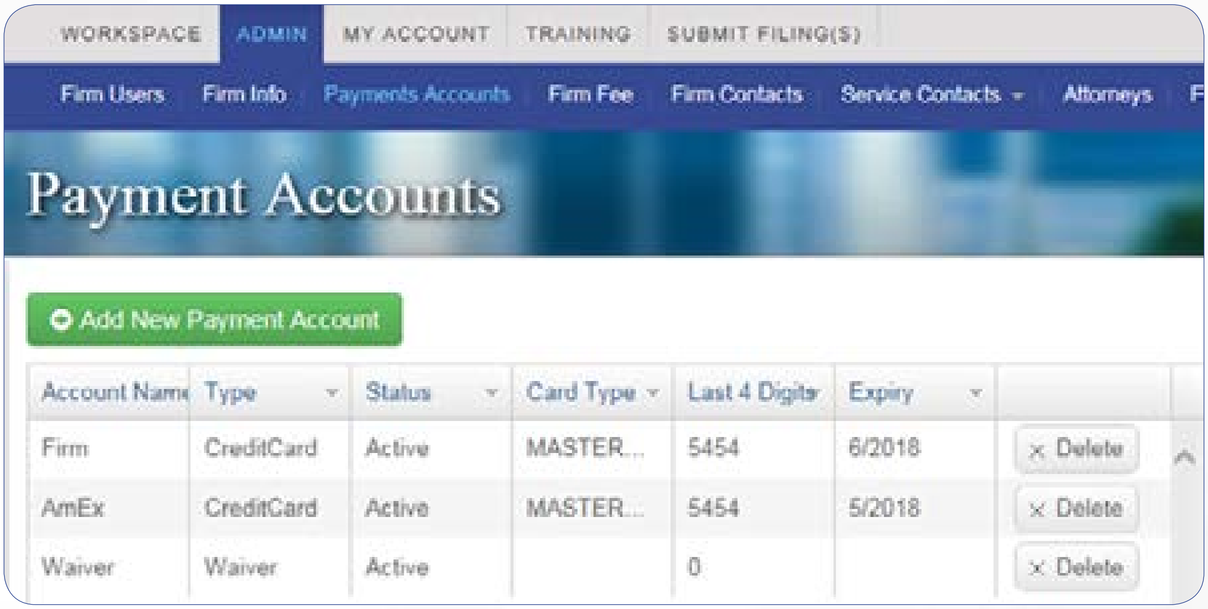


Figure 2-13, Payment Accounts Page

4. Firm Fee

By default, FileTime assigns your firm to the **Gold Plan** ($2.99 fee per submission).

On the **Firm Fee Information** page (Figure 2-14) you can select the FileTime fee plan that best fits your firm needs.

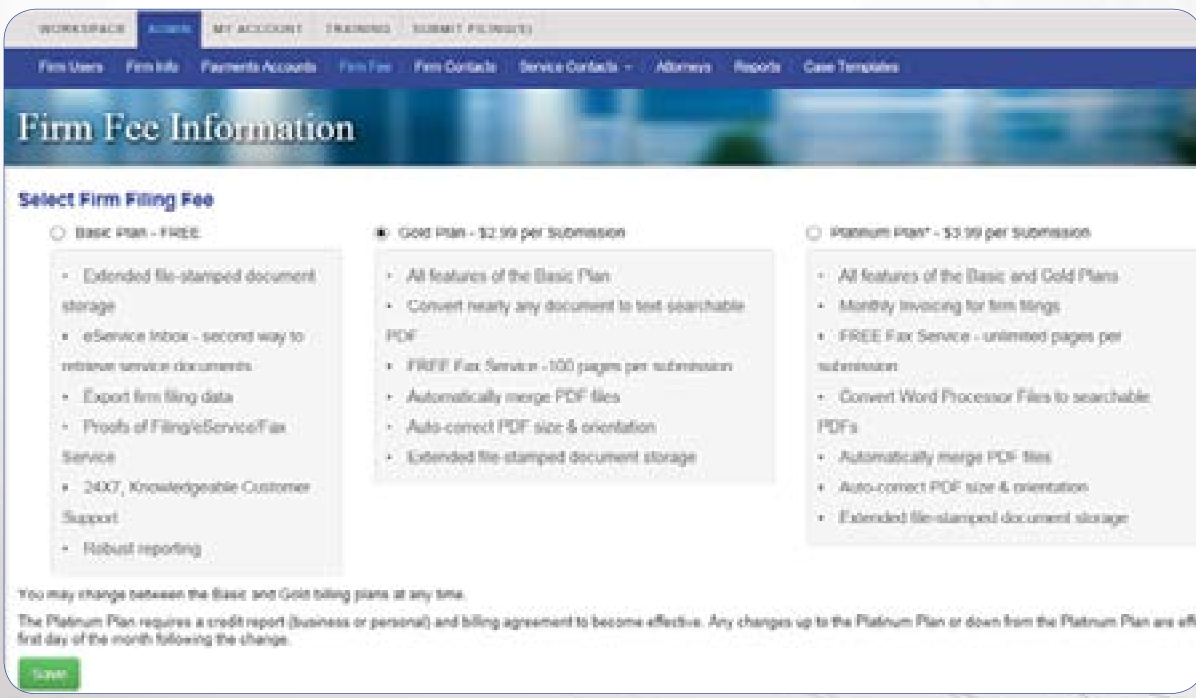


Figure 2-14, Firm Fee

5. Firm Contacts

This **Firm Contacts** page (Figure 2-15) 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.

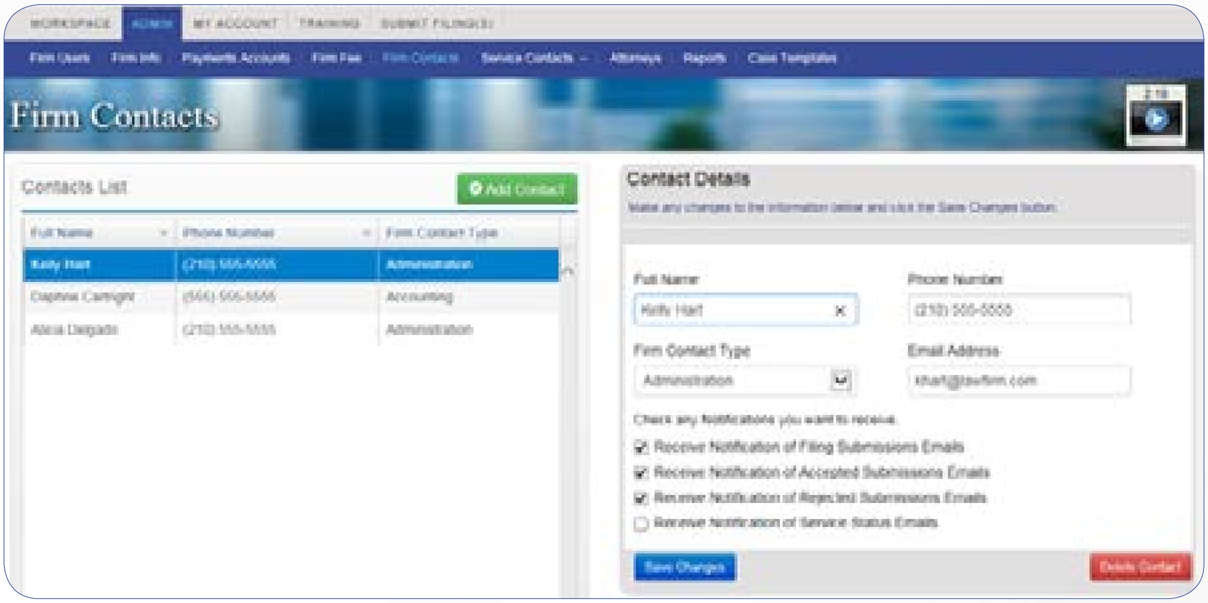


Figure 2-15, Firm Contacts

After you add a Firm Contact go to the **Contact Details** side and:

- Select the **Firm Contact Type** (pick the one that most closely fits) and
- Select any **Notification emails** for firm filers that you want that person to receive.

6. Service Contacts

There are two features available when you click the drop-down arrow for **Service Contacts** page (Figure 2-16):

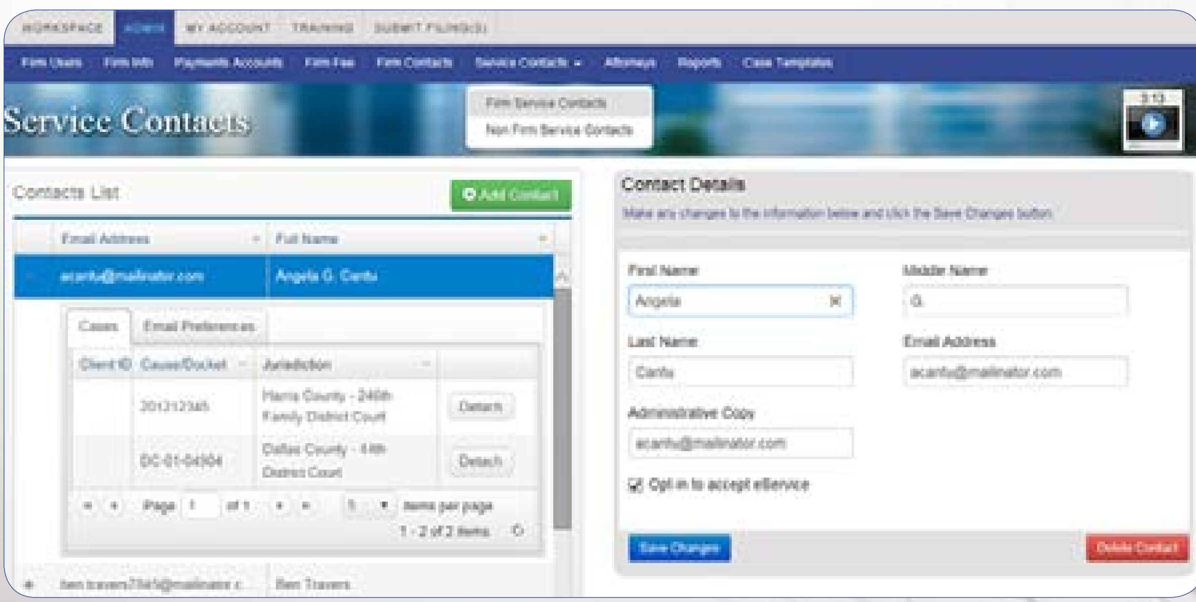


Figure 2-16, Firm Service Contacts and Non-Firm Service Contacts

- **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 eFileCA 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 add and manage counsel from other firms, or pro se filers, when you have an email address for that person and that counsel was not opted in to receive eServices for cases.

You should add all your firm attorneys as Service Contacts. Whether to add your firm's paralegals and other staff is up to your firm's policy.

When you enter a new Service Contact, or view existing firm Service contacts you have the options to:

- Add an Administrative Copy eMail address. Doing so causes a copy of any eService Notifications emails to that service contact to also be sent to the Administrative Copy email address.
- Opt the Service Contact into the eFileCA Public Service Contact List.

7. Attorneys

The list of attorneys on the **Firm Attorneys** (Figure 2-17) page will automatically populate the attorney-of-record selector when a filer is submitting a new case filing. Attorneys who are registered in the eFileCA system will automatically display on this page. You can add attorneys to this list without registering them in the eFileCA system.

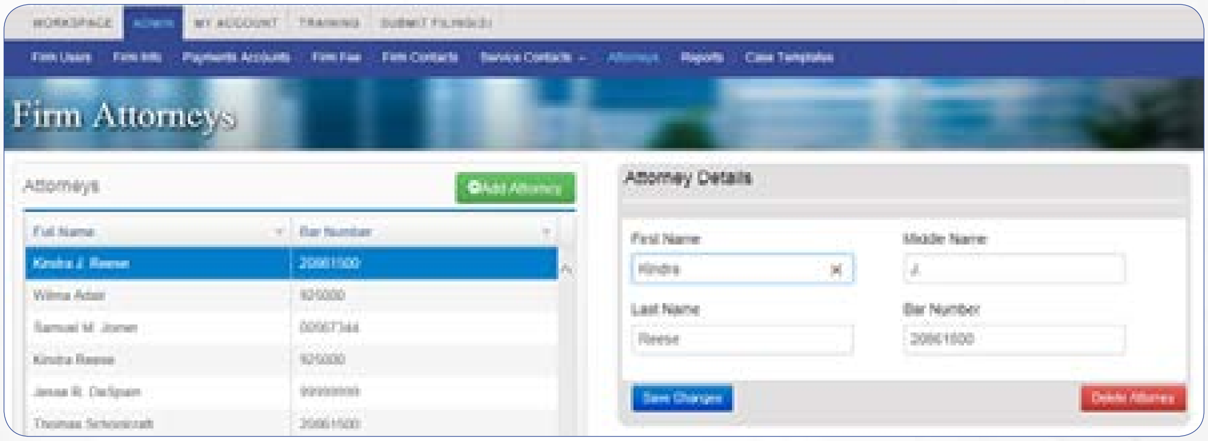


Figure 2-17, Firm Attorneys

8. Reports

The **Reports** feature (Figure 2-18) 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.

There are three categories of reports from which you can select to generate:

- **eFiling** - Generate these reports to view submissions of eFilings and/or eServices.
- **eServices** - Generate these reports to view inbound and outbound eServices to your firm attorneys.
- **Alerts** - Generate these reports to view firm-wide Failed and Returned for Correction filings as well as failed eService attempts and failed fax service attempts by your firm.

Figure 2-18, Reports

Learn more about the reports in Chapter 8.

9. **Case Templates**

The **Case Templates** feature (Figure 2-19) enables your firm eFiling Administrator to create and edit 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

The **My Account** section (Figure 2-20) contains all data specific to a registered user in FileTime and the eFileCA system.

Every registered firm member has access to this area to update their personal information.

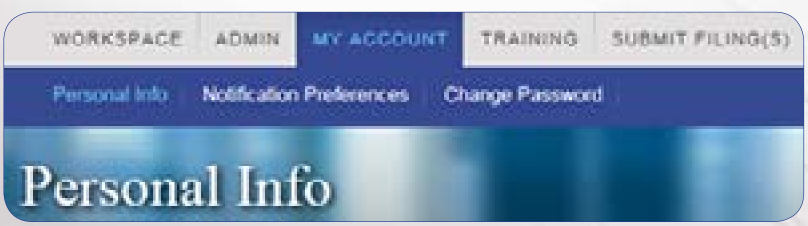


Figure 2-20, My Account

1. **Personal Info**

Go to the **Personal Info** page (Figure 2-21) to update your name, opt in to be added to the eFileCA Public Service Contact List, or to update your security question.

Figure 2-21, Personal Info

2. Notification Preferences

eFileCA automatically send a number of eFiling and eService status emails to you. See **Chapter 10** to view samples of these emails. On the **Notification Preferences** page (Figure 2-22) you and your firm users can manage which ones to receive.

You can also designate additional people to receive **Notification of Service emails** for any eServices sent to you by counsel.

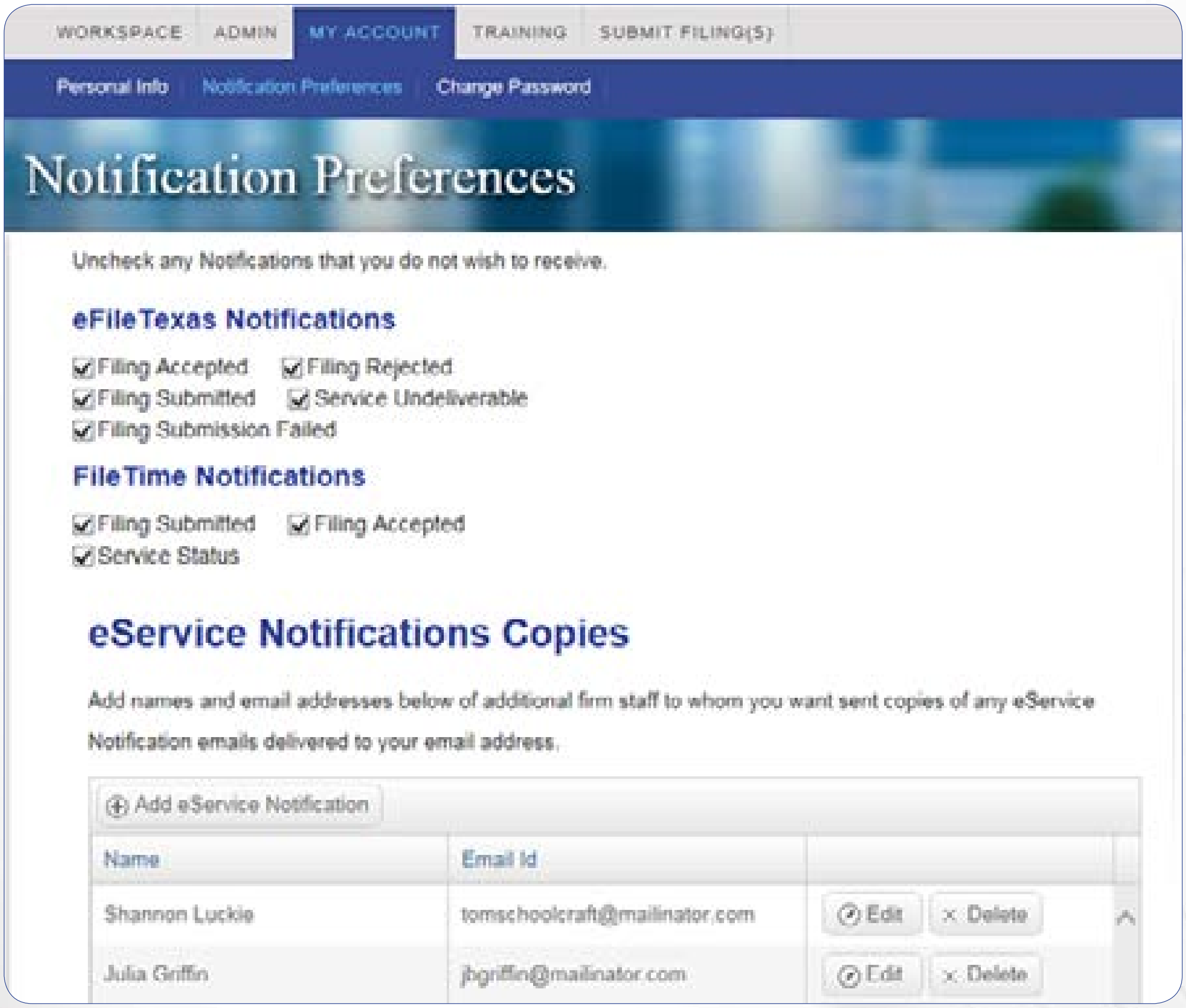


Figure 2-22, Notification Preferences

3. Change Password

The **Change Password** page (Figure 2-23) is where you go to, well... change your password. You can also change your **Security Question** on this page. This is especially important to do if you or we had eFileCA manually update your password because the automated **Forgot Password** function did not work correctly for you.

Figure 2-23, Change Password

E. Training Sub-Navigation Bar

We offer a number of training options and they are all accessed via the Training sub-menu as shown if figure 2-24.

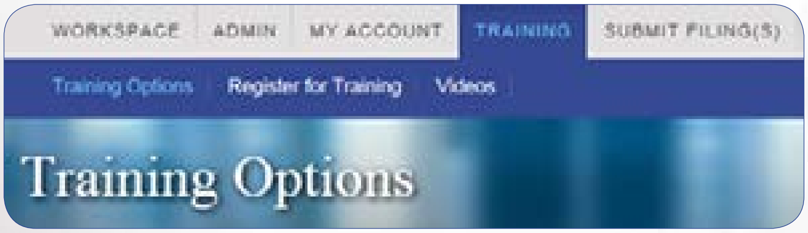


Figure 2-24, Training

1. **Training Options**

   The **Training Options** page (Figure 2-25) enables you to access our (1) live Internet-based training, (2) written guides such as this, and video training.

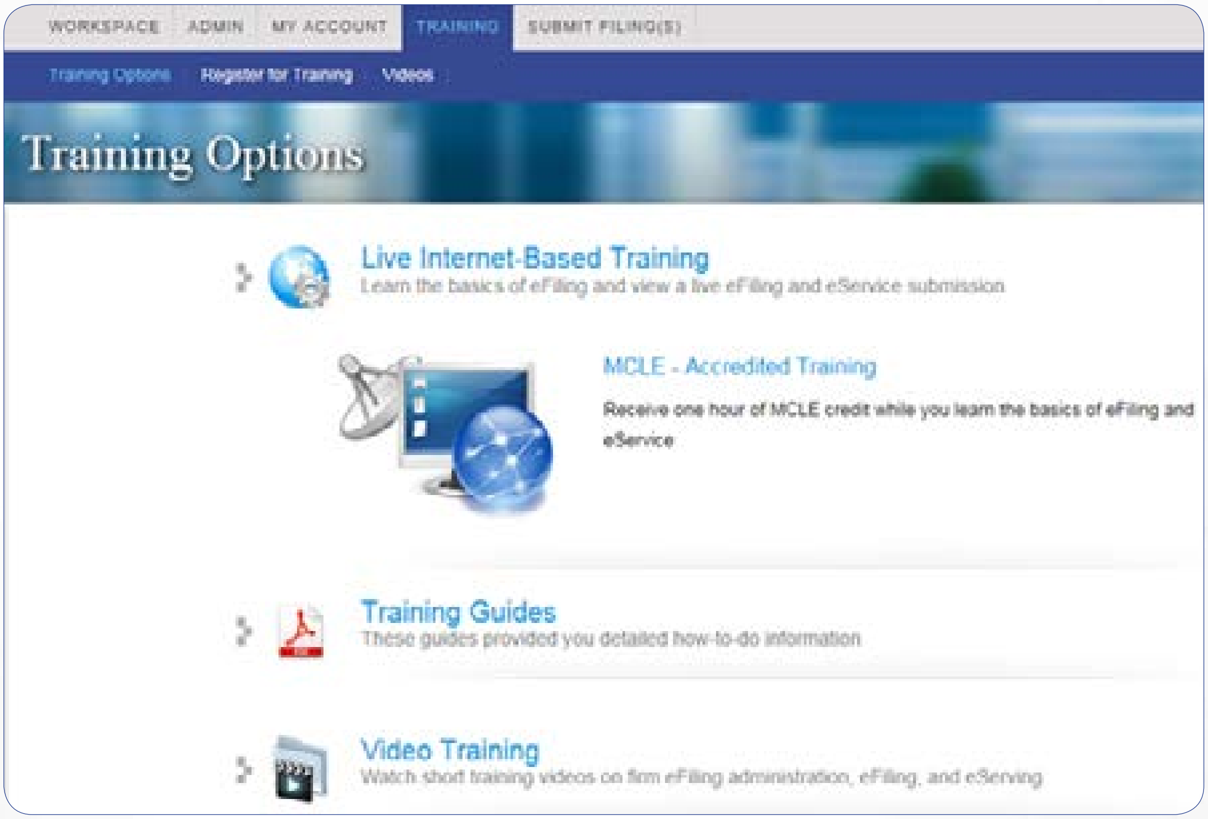


Figure 2-25, Training Options

2. **Register for Training**

   Go to our **Register for Training** page (Figure 2-26) to register to attend one of our live Internet-based, Texas MCLE-accredited training sessions. Click the **Register** button for the session you wish to attend.

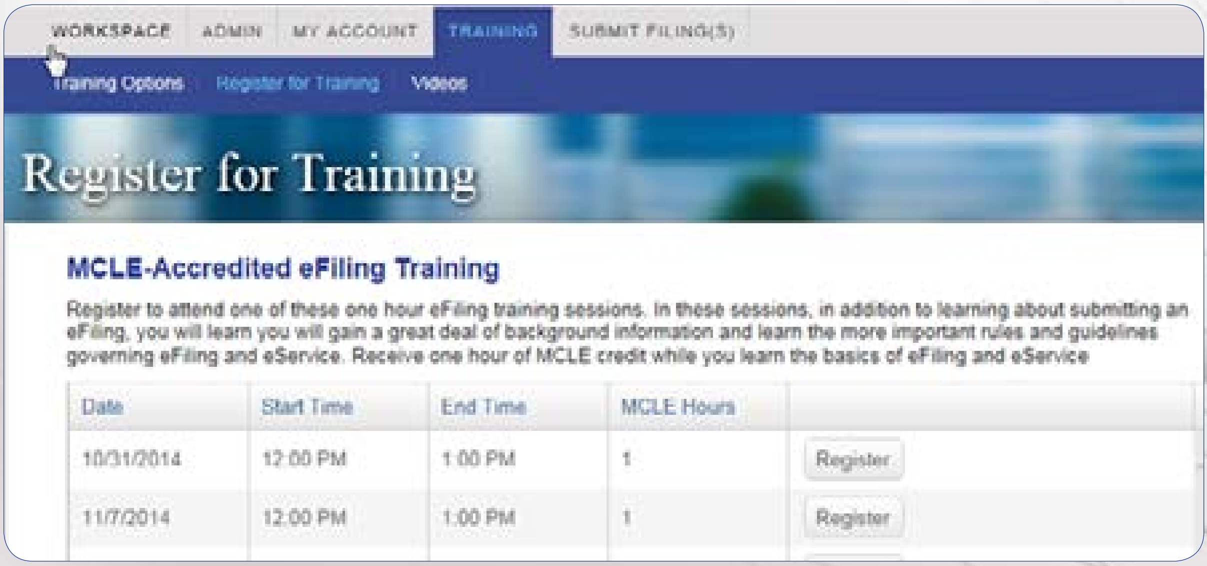


Figure 2-26, Register to Attend Texas MCLE-Accredited Training

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 3

III. Administering Firm Users

The **Firm Users** page (**Figure 3-1**) is arguably the most important page in the Admin section because it provides you so much control of your firm staff that are registered in the eFileCA system.

When you go to this page you will see everyone in your firm who is registered with the eFileCA system and associates with this firm account. If you do not see a firm member on this list and you know that he/she is registered with the eFileCA system, most likely:

- that person created a new firm account and registered with the system through that different firm account or
- you, or they, registered with eFileCA through another service provider and we do not yet have their name in our database. See **Update Users from eFileCA** (**A**) below for more about this.

Call our Customer support team at 800-658-1233 if this situation arises so we can check on it for you.

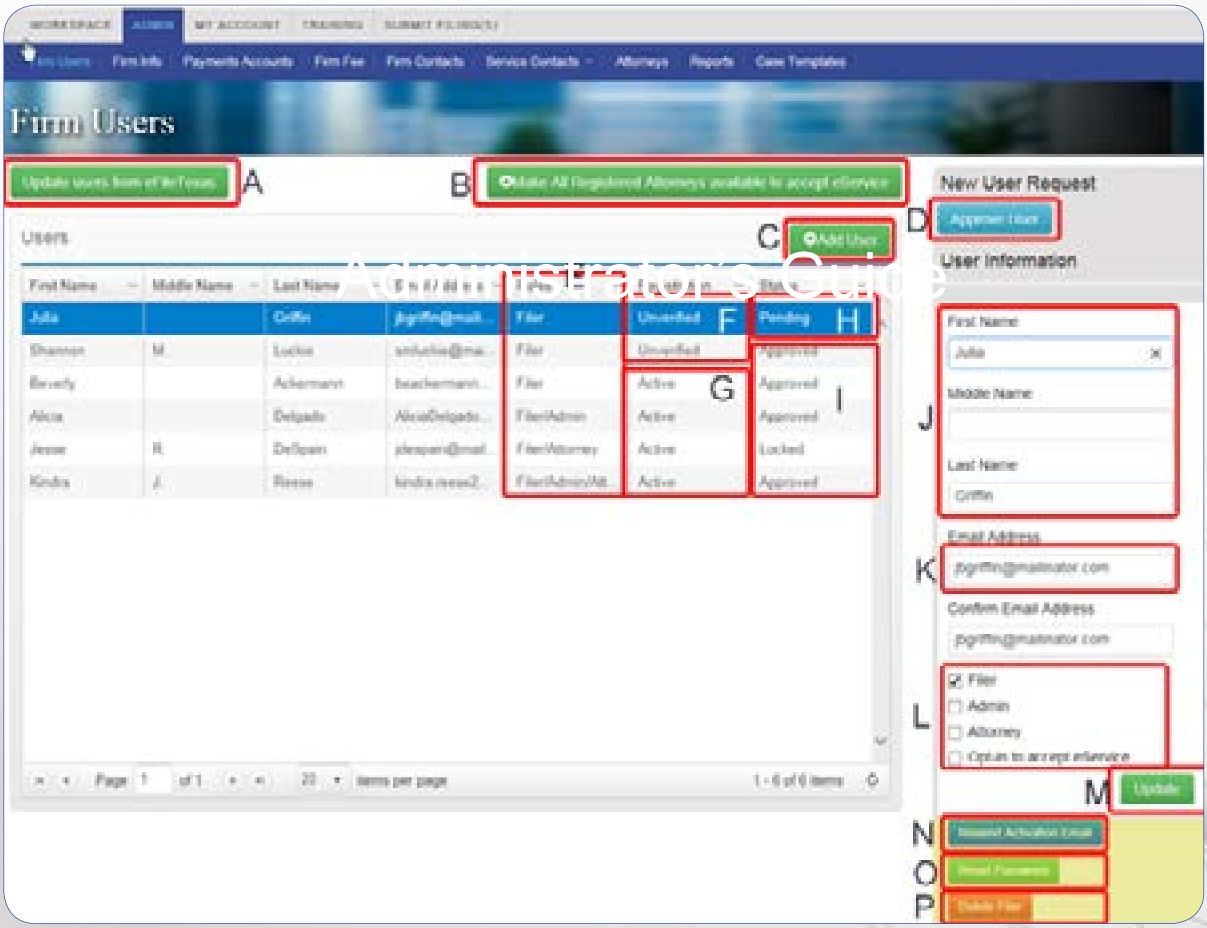


Figure 3-1, Firm Users Page

Here is a description of the functions on this page:

A. Update Users from eFileCA

Click this button (Figure 3-1, A) to download the most recent information about your firm eFiling users from eFileCA. If anyone registered from and made changes to their registration from another service provider, clicking this button will cause FileTime to download that new data.

B. Make All Registered Attorneys available to accept eService

Clicking this button (Figure 3-1, B) will add all of your registered firm attorneys to the eFileCA Public Service Contact List. This will enable your firm attorneys to conform to the TRCP and TRAP that require an attorney to be available for eService in mandatory eFiling jurisdictions.

C. Register Firm Users

Click this button (Figure 3-1, C) to register new staff or attorneys with eFileCA through your FileTime firm account.

D. Approve Users

If your firm allows firm members to register themselves (**Admin > Firm Info**), you will need to approve their registration application before they can complete the registration process.

If this situation arises, you will receive an email from FileTime stating that you need to approve this user.

Login to FileTime and click the **Approve User** button (Figure 3-1, D) to approve the new registrant.

E. User Roles

The Roles column (Figure 3-1, E) enables you to quickly view the roles assigned to each registered firm user. You can change the firm roles over in the **User Details** section - see **Section L** below.

Only Administrators have access to the Admin area and you can appoint as many administrators as you wish.

F. Registration

The Registration column shows whether or not the firm user has completed the registration process.

1. Unverified

An **Unverified** status (Figure 3-1, F) indicates that the person has not clicked the **Activate Account** link in the Account Activation email sent to him/her by eFileCA. If he/she does not have a copy of that email you can resend it by clicking the **Resend Activation Email** (**Section N**).

2. Active

Active status (Figure 3-1, G) indicates that this person has completed the registration process and is ready to eFile.

G. Status

The Status column enables you to quickly spot any registrants you need to approve.

1. **Pending**

   Pending status (Figure 3-1, H) indicates that you need to Approve this new registrant.

2. **Approved**

   Approved status (Figure 3-1, I) indicates that the user has been approved by a firm admin.

H. Update Filer Information

Update the name of the highlighted firm user in this area (Figure 3-1, J).

eFileTexs does not allow those with a role of Filer (as opposed to those with a role of Administrator) to update their name and email address. Only a person with the Administrator role can do so from this section.

I. Update Filer Email Address

The email address of every registrant in the eFileCA system must be unique. But, you can update the email address for your firm users in this field (Figure 3-1, K).

The eFileCA system does not allow you as a firm admin to update your personal email address in this manner. If you are an Admin, you must update your email address through **My Account > Personal Information**. Read more detailed information about updating email addresses.

J. Update Filer Roles

In this section (Figure 3-1, L) you can appoint as many roles as needed for each registrant. If the user is an attorney you can add or update the bar number.

By default, the first person to register a firm account is assigned roles of Administrator and Filer.

The three roles available in the system are:

1. **Administrator** - Only administrators have access to the Admin section.
2. **Filer** - Only Filers can submit eFilings and eService. A firm user with the dual roles of Administrator and Filer can both eFile and access the Admin section.
3. **Attorney** - An attorney who is assinged this role only cannot eFile and does not have access to the Admin section.

If you click the **Attorney** option you will be prompted to add the attorney's bar number and it will display in this area.

You may assign as many roles to each firm user as necessary.

You can also opt this user into the eFileCA Public Service Contact List by clicking the **Opt-in to receive eService** button.

K. Update Button

Be sure to click this button (Figure 3-1, M) if you made any changes above.

L. Users Actions

The buttons in this yellow-highlighted area will vary.

1. **Resend Activation Email**

   This button (Figure 3-1, N) only displays when the highlighted user is a new registrant and still showing a Registration status of Unverified.

2. **Reset Password**

You can reset firm users' password using the **Reset Password** button (Figure 3-1, O).

3. **Delete Filer**

   Click the **Delete** (Figure 3-1, P) button to inactivate the registration of any of your firm members that depart you firm.

4. **Unlock User**

   eFileCA locks an account when a filer makes five consecutive unsuccessful attempts to login.

   The Status of the filer will then display as Locked.

   Clicking the **Unlock** button (**Figure 3-2, A**) enables you to unlock the account and reset the password.

Figure 3-2, Unlock the User

Chapter 4

IV. Registering Firm Members

Perhaps the most important thing to know about registering in the eFileCA system is that you only need to register once for a firm. After you have registered that registration information is saved by eFileCA and you can then login to the system through any other service provider.

In other words, if you already have a firm account and have been eFiling through the eFileCA free service provider portal, you can login at FileTime with the same credentials and begin eFiling immediately.

If you are not sure whether you are registered with the eFileCA system, try registering. If you receive a warning that your email address is already in use, then you, or someone on your behalf, has already registered you with the eFileCA system.

A. Set Up a Firm Account and Register Yourself

If you are reading this guide before you have registered with any service follow the instructions below.

If you have previously registered with eFileCA you can login to FileTime without re-registering in the eFileCA system. Call our Customer Support team at 800-658-1233 if you have any questions about registering or logging in.

Figure 4-1, Click the REGISTER NOW Button

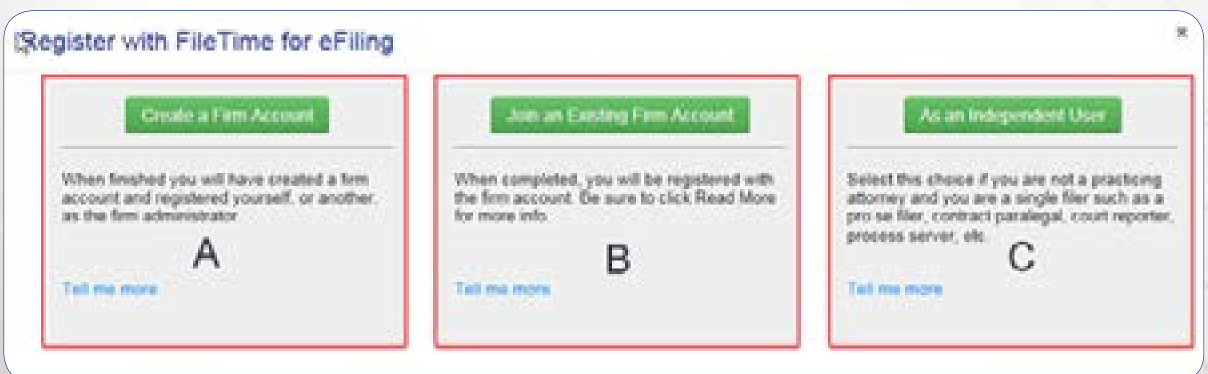


Figure 4-2, Choose the Registration Option

1. **Create a Firm Account**

   Always choose this option (Figure 4-2, A) if you are a law firm, a solo attorney licensed in the state of Texas, or you have multiple filers in your organization and there is an attorney under which the non-attorneys can submit eFilings.

2. **Join an Existing Firm Account**

   Choose this option (Figure 4-2, B) to register yourself with an existing firm account. If you are not sure whether your firm has an eFiling account or not, choose this option first. If your firm does not have an existing firm account this will become apparent to you during the registration process and you can choose instead the Create a Firm Account option.

You can only join a firm account that allows firm staff to register themselves. If, during the registration process, you receive a message that your firm does not allow staff to register themselves you will need to have a firm eFiling manager register you.

3. **As an Independent User**

This option (**F**igure 4-2, C) is not for attorneys or the legal support team, unless a legal support team member is filing as a pro se filers.

Court reporters, process servers, etc., should choose this option. Under this option you will not need a Texas licensed attorney associated with your account.

B. Allow Users to self register for this account

The firm eFiling Administrator(s) can allow firm staff to self-register. To do so, after logging into FileTime, click the **Admin** tab and then **Firm Info**.

Click the **Allow users to self register for this account** option (Figure 4-3) and **Save Changes**.

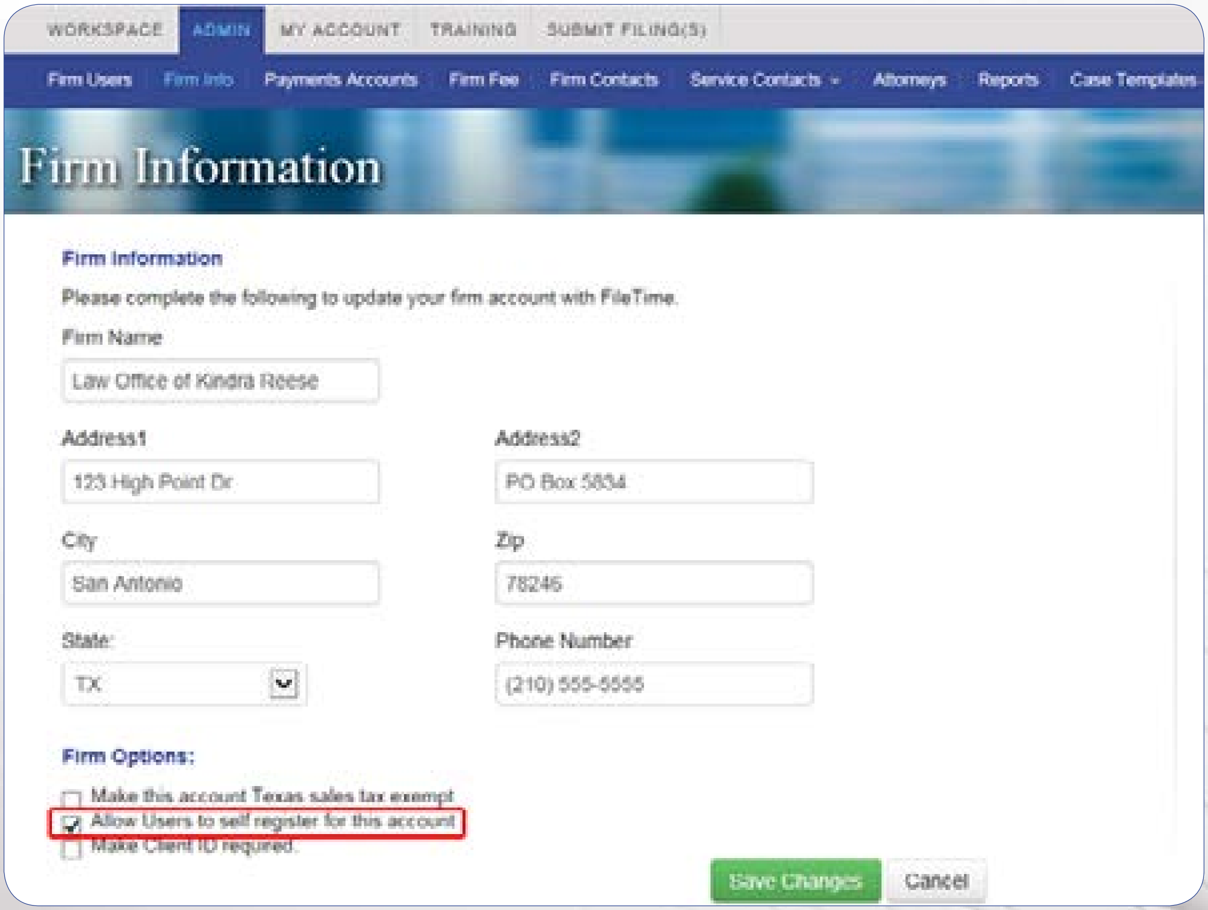


Figure 4-3, Allow Firm Staff to Self Register

When a firm user registers him/herself the firm eFiling administrators will receive an [email alerting them to that fact]().

An administrator must then login and approve the new registrant so that the registrant can complete the registration process.

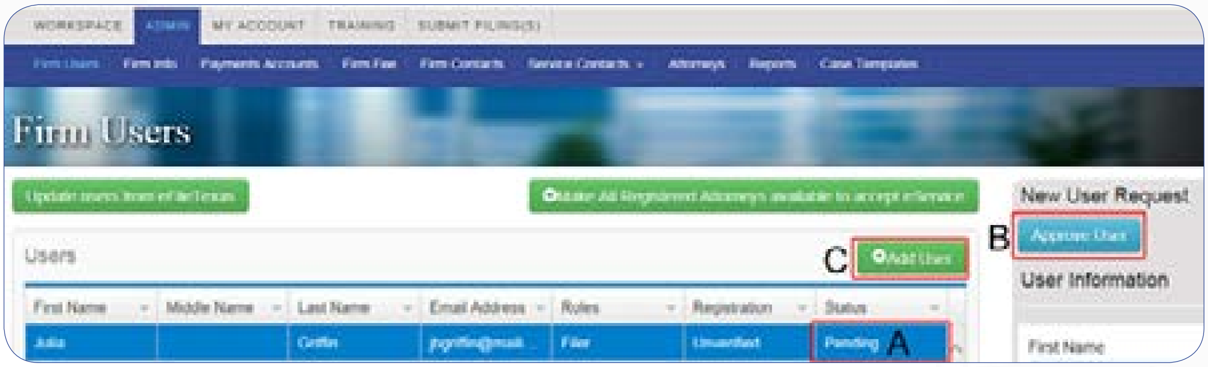


Figure 4-4, Approve New Registrant

Login to FileTime and go to **Admin > Firm Users**.

Click the name of the registrant, the **Status** will display as Pending (Figure 4-4, A), to highlight it.

Click the **Approve** button (**Figure 4-4, B**).

C. Register Users from the Admin Section

You can also register users as an administrator from the Admin panel.

Login to FileTime and go to **Admin > Firm Users**. Click the **Add User** button (Figure 4-4, C) and let FileTime guide you through the process.

You will not create a password or security question for the new user so the **Activate Account** email he/she will receive contains both the Activate Account link and a temporary password. Be sure to counsel the new registrant to login immediately to change the password and set the security question.

If the security question is not set, he/she will not be able to use the automated password reset feature.

D. Complete the Activation Process

The registration process is not complete until a new registrant:

- Clicks the **Activate Account** link in the email he/she receives from eFileCA and
- Logs into the eFiling system.

1. Activate Account Emails

Depending on how a new firm user was registered he/she will receive one of these two emails:

- **User Self-Registered** and created a password and set the security question.

> Subject: **eFileCA.gov - New User Activation**
>
> Body:
>
> You have been registered with eFileCA.gov, the Texas E-Filing System. Please click on the link below to activate your account.
>
> **Activate Account**
>
> Do not reply to this email. This message was automatically generated by eFileCA.gov.

- **Firm Administrator Registered** so no password was created or security question set

> Subject: **eFileCA.gov - New User Activation**
>
> Body:
>
> You have been registered with eFileCA.gov, the Texas E-Filing System. Please click on the link below to activate your account.
>
> **Activate Account**
>
> After activating your account, please use the following system generated password.
>
> Password: **$$$newpassword**
>
> Your password is made up of numbers, letters, and characters. In order to make sure you are entering the password accurately, it is easiest to copy and paste the password into the EFSP system.
>
> Do not reply to this email. This message was automatically generated by eFileCA.gov.

2. **Login**

   To complete the registration process, after the new registrant clicks the **Activate Account** link in the email, he/she must login to the eFileCA system through any service provider.

Chapter 5

V. Manage Your Firm's eFiling Users

As a firm eFiling administrator you can perform the following tasks from the **Admin >Firm Users** page (Figure 5-1).

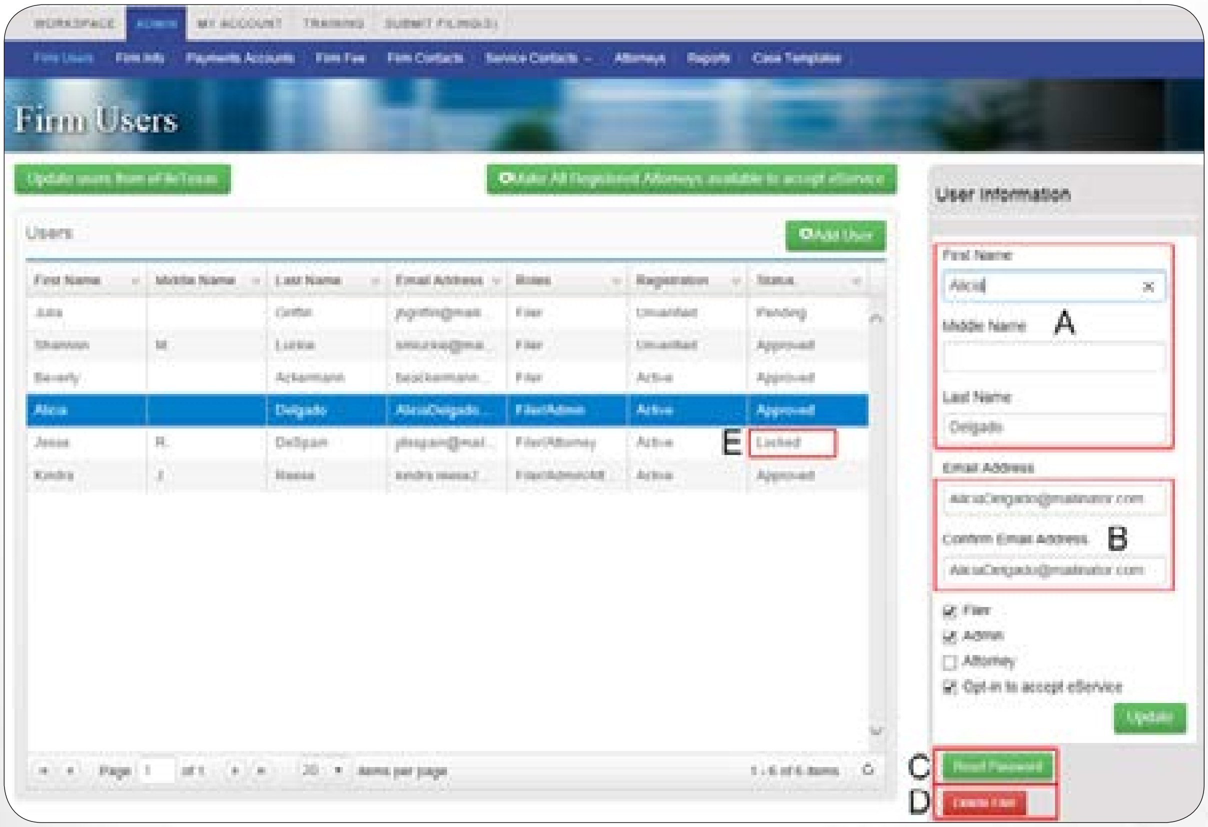


Figure 5-1, Firm Users Page

A. Update User Information

A firm user with a a role of Filer or Attorney cannot update his/her name. Only a firm user with a role of Administrator can change the name of the firm filers and/or attorneys.

A Firm Administrators can update his/her name. Under **Admin > User Information**, click the name of the filer you wish to update. Make any changes in the **User Information** section (Figure 5-1, A) and click the **Save Changes** button.

B. Update a User's Email Address

A firm user with a a role of Filer or Attorney cannot update his/her email address. Only a firm user with a role of Administrator can change the email address of the firm filers and/or attorneys.

Click on the name of the user on the **Firm Users** page to highlight it. Update that person's email address in the **User Information** section (Figure 5-1, B).

NOTE: Administrators can only update other users' email address through this Admin function. Admins must go to **My Account >Personal Information** to update their personal email address.

C. Resetting Passwords

If your firm filer cannot, or will not use the automated password reset function you can perform this task for him or her.

Click on the name of the user on the **Firm Users** page to highlight it. Click the **Reset Password** button (Figure 5-1, C) and let FileTime guide you through the process.

D. Unlock Filer Account

eFileCA locks a user's account after five unsuccessful login attempts.

The user's account will show a **Status** of **Locked** (Figure 5-1, E) when this occurs.

To unlock the user's account, click on the name of the user on the **Firm Users** page to highlight it. Click the **Unlock** button (Figure 5-2, A). You will unlock the account and reset the password for the user.

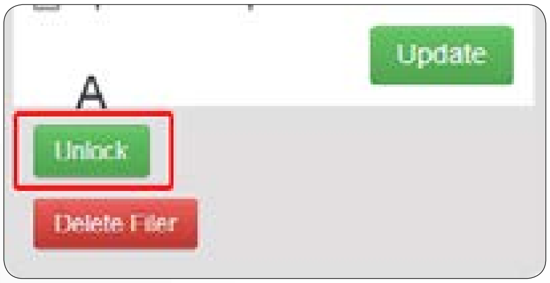


Figure 5-2, Filer Locked Out

E. Resend the Registration Activation Email

The registration process for a new user is not complete until the new user clicks the Activate Account in the [New User Activation email](#).

The **Registration** status for anyone who has not completed this step will display as **Unverified** (Figure 5-3, A).

To resend the activation email to the user, click on the name of the user on the **Firm Users** page to highlight it. Click the **Resend Activation Email** button (Figure 5-3, B).

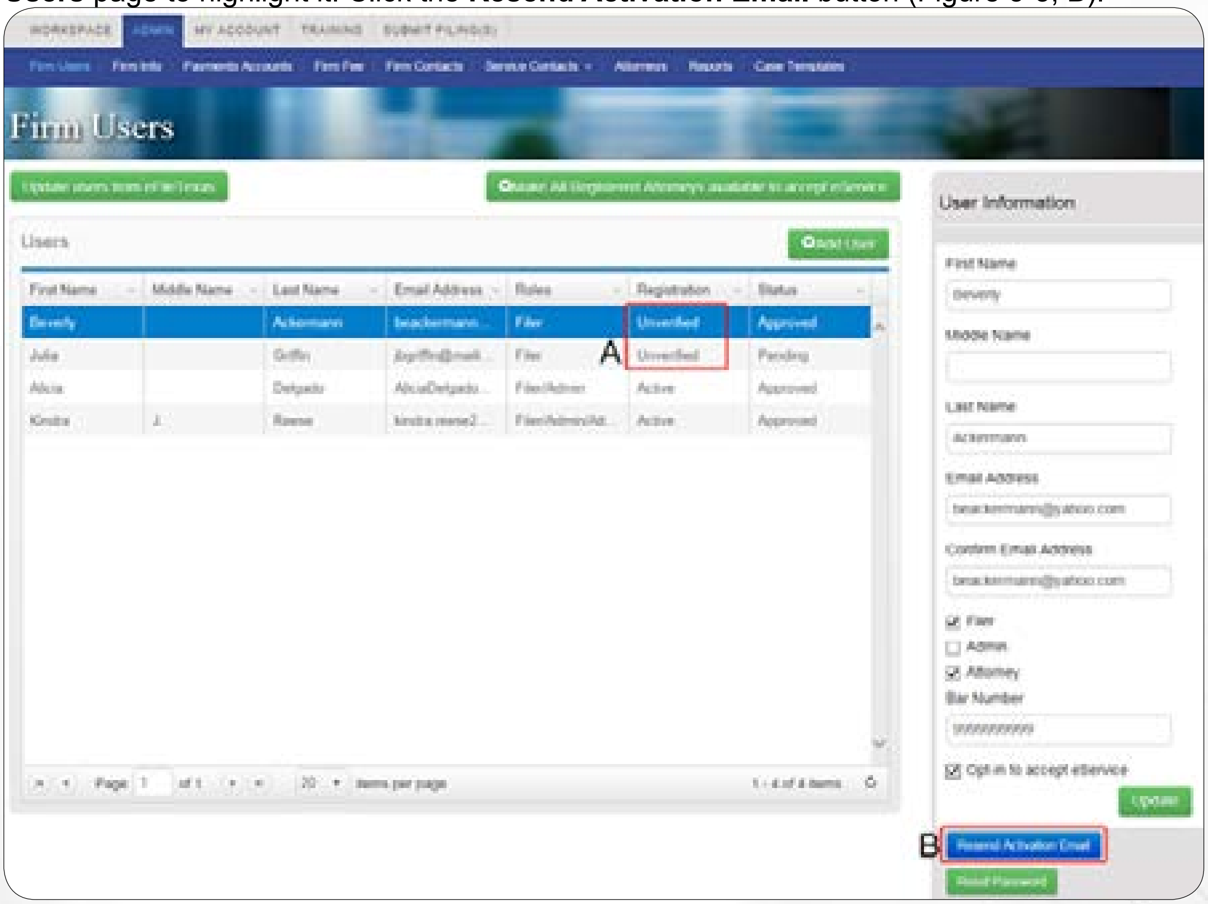


Figure 5-3, Resend Activation Email

F. Delete Firm Users

When a user leaves your firm for any reason you can delete him/her from your firm account.

Click on the name of the user on the **Firm Users** page to highlight it. Click the **Delete** button (Figure 5-1, D).

Deleting a firm user:

- Inactivates that person's eFiling account (email address) in the entire eFileCA system, and
- Removed that person as a service contact for all firm cases, but
- Does not remove that person from your firm's list of firm service contacts.

Chapter 6

VI. Manage Your Firm's Service Contacts

Service Contacts in the eFileCA system are anyone that may be added to a case to be eServed by counsel. Anyone, both attorneys and non-attorneys, can be service contacts and be associated with a case to receive eService.

A. General Information about Service Contacts

1. Service Contacts versus eService Recipients vs Non-Firm Service Contacts

eFileCA labels all service contacts for a case as Service Contacts. We choose to add finer distinctions between your own firm's service contacts and those associated with other case counsel.

a. **Service Contacts** - FileTime labels your own firm members as **Service Contacts**. Your service contacts will be eServed for the case the first time your firm adds them as a service contact for your firm. However, on future submissions by your firm in the case, FileTime suppresses eServices to your own firm service contacts so your team is not receiving eService Notification emails for your own eServices.

a. **eService Recipients -** FileTime labels service contacts for other case counsel as **eService Recipients**. They will receive eServices when your firm submits eServices for the case, unless your firm members specifically choose not eServe them.

a. **Non-Firm Service Contacts** - This is an attorney for another case party that your firm has added as a service contact for the case because that counsel has not made him/herself a service contact for the case and is not on the eFileCA Public Service Contact List, so cannot be added from that list. The **Non-Firm Service Contact** option is the final solution. Your firm members add that counsel, technically as a service contact under your firm, but add the correct firm name for the counsel to display.

1. Edit and Remove only Service Contacts Added by Your Firm

By design of the eFileCA system, you cannot edit or remove case service contacts added by another firm. You can only edit or delete case service contacts, or Non-Firm Service Contacts, added to the case by your firm.

A. Adding Service Contacts to a Case

Service Contacts are added to case in five different ways:

a. When your firm members are submitting filings they can assign as service contacts to the case your firm members who want to receive eServices for that case (Figure 6-1, A).

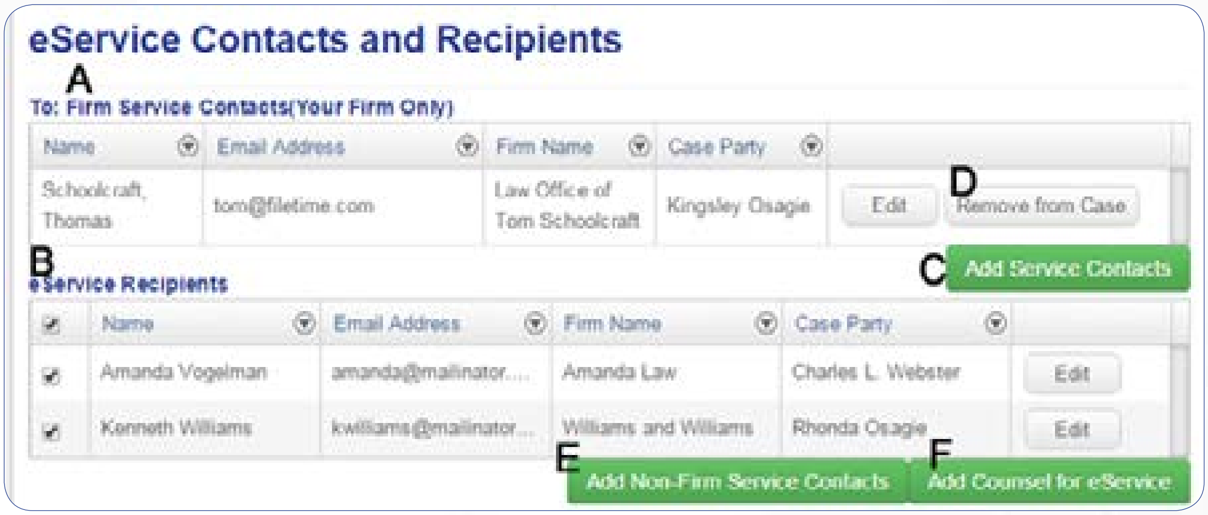


Figure 6-1, eFiling Submission Service Contacts Page

They click the **Add Service Contacts** button (Figure 6-1, C) to do so.

a. When other counsel for the case eFiled they could have added their firm service contacts for the case which now display under the eService Recipients area (Figure 6-1, B) when your firm members eFile into the case.

a. Your firm members can find and add counsel from the eFileCA **Public Service Contact List** to a case. This only works, of course, if the other counsel has been added by their firm to the eFileCA **Public Service Contact List**. They would click the **Add Counsel for eService** button (Figure 6-1, F) button to do so.

a. If counsel: (1) has not been added as a service contact for the case by his/her firm, (2) is not on the **Public Service Contact List**, and (3) you know his/her email address; your firm members may can add that counsel as a **Non-Firm Service Contact**. They would click the **Add Non-Firm Service Contact** button (Figure 6-1, E) button to accomplish this.

a. On the **Case Overviews** page (Figure 6-2) your firm filers can drill down in a case to get to the Service Contacts tab and there add and/or delete firm service contacts to the case.

Figure 6-2, Case Service Contacts Tab

On this tab they can:

- View all service contacts assigned to the case by all counsel (Figure 6-2, A),
- Detach any of your firm's service contacts associated with the case (Figure 6-2, B),

- Associate any of your firm service contacts to the case (Figure 6-2, C), and
- Associate Non-Firm Service contacts to the case (Figure 6-2, D).

A. Remove Service Contacts from a Case

There are multiple ways to remove a firm service contact from a case or cases.

a. When your firm members are submitting filings they can delete firm service contacts from the case (Figure 6-1, D).

a. On the **Case Overviews** page your firm administrators and filers can drill down in a case to get to the **Service Contacts** tab and there delete firm service contacts to the case (Figure 6-2, B).

a. You can view all cases to which a firm service contact is associated and selectively delete the service contacts from cases (Figure 6-3).

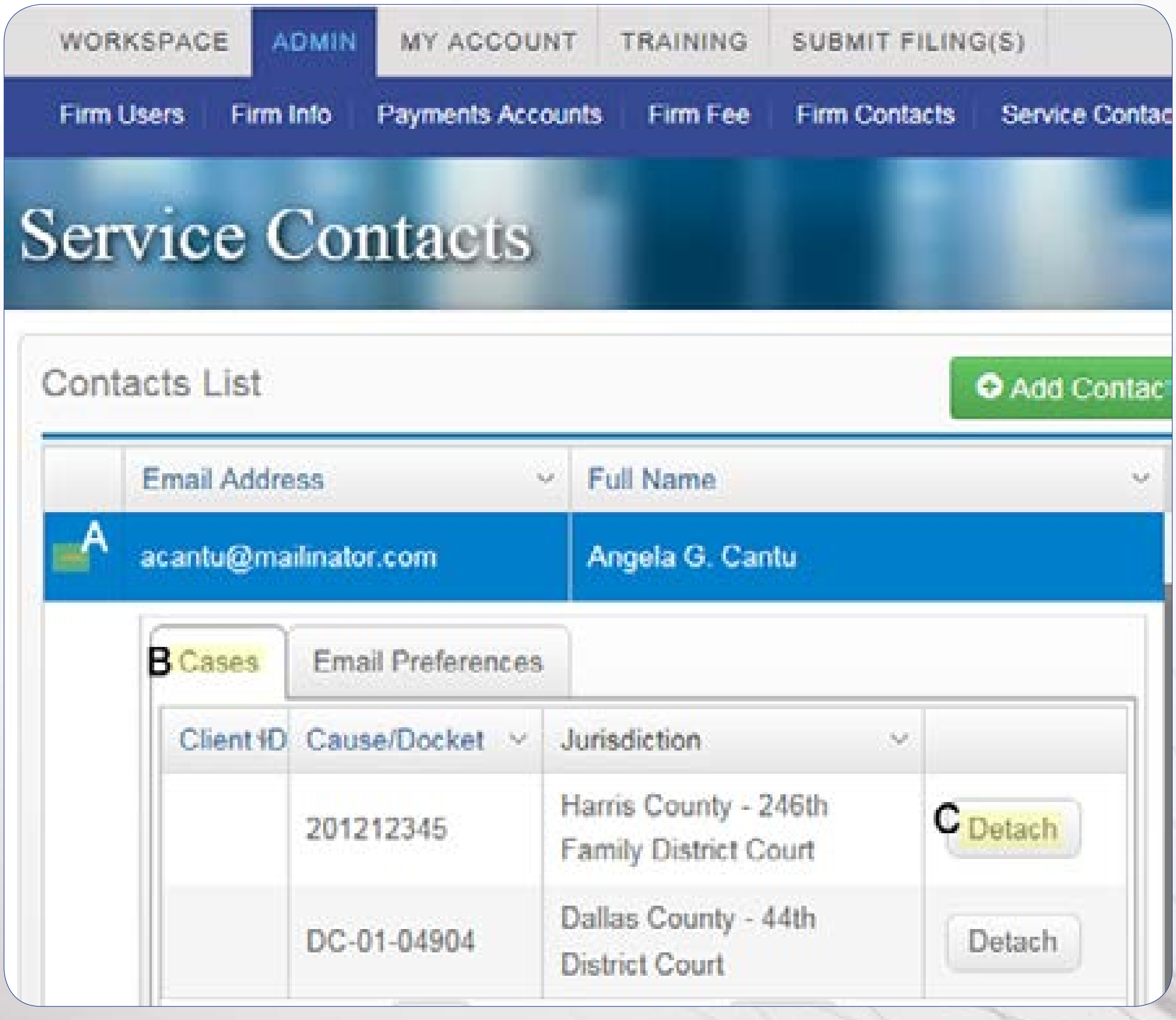


Figure 6-3, Selectively Disassociate Cases from Service Contacts

a. You can remove a firm service contact, and/or a Non-Firm Service Contact, from all cases. Do so under **Admin >Service Contacts** and **Non-Firm Service Contacts** sections.

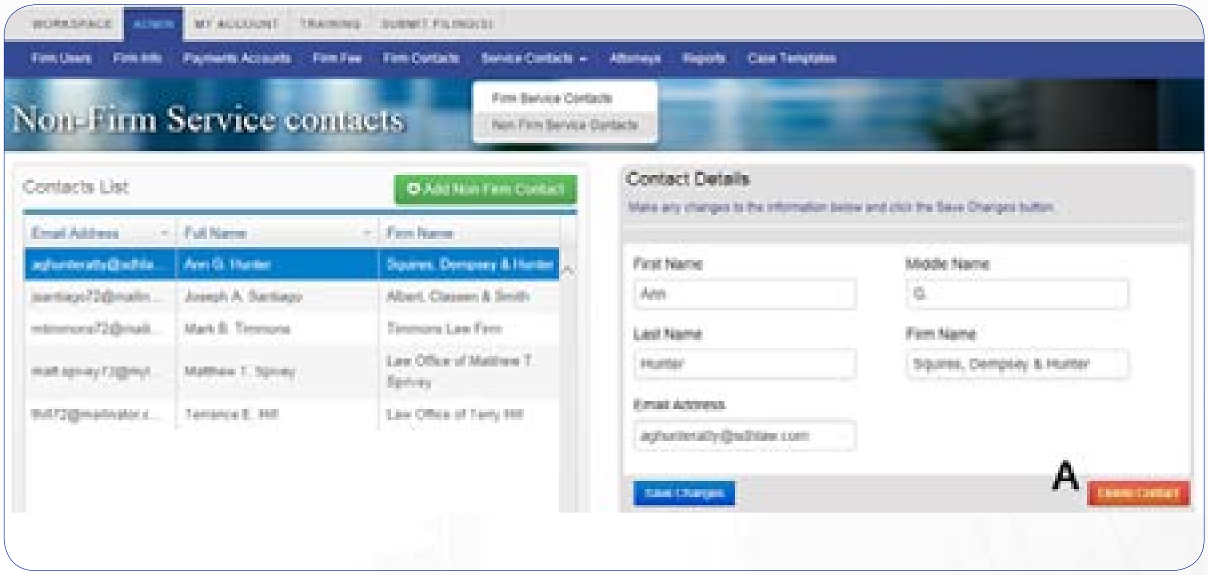


Figure 6-4, Add and Delete Service Contacts

A. Managing Non-Firm Service Contacts

Your firm members can add new Non-Firm Service Contacts to your firm account and to a case.

Once they have added the Non-Firm Service Contact, however, they cannot edit any information about that person. Your filers can only add and delete them for cases.

As a firm administrator, you can add, edit, and delete Non-Firm Service Contacts associated with your firm account (Figure 6-5).

However, if other firms have added your firm attorneys as Non-Firm Service Contacts for their firms, only they can edit or delete those Non-Firm Service Contacts of your firm members.

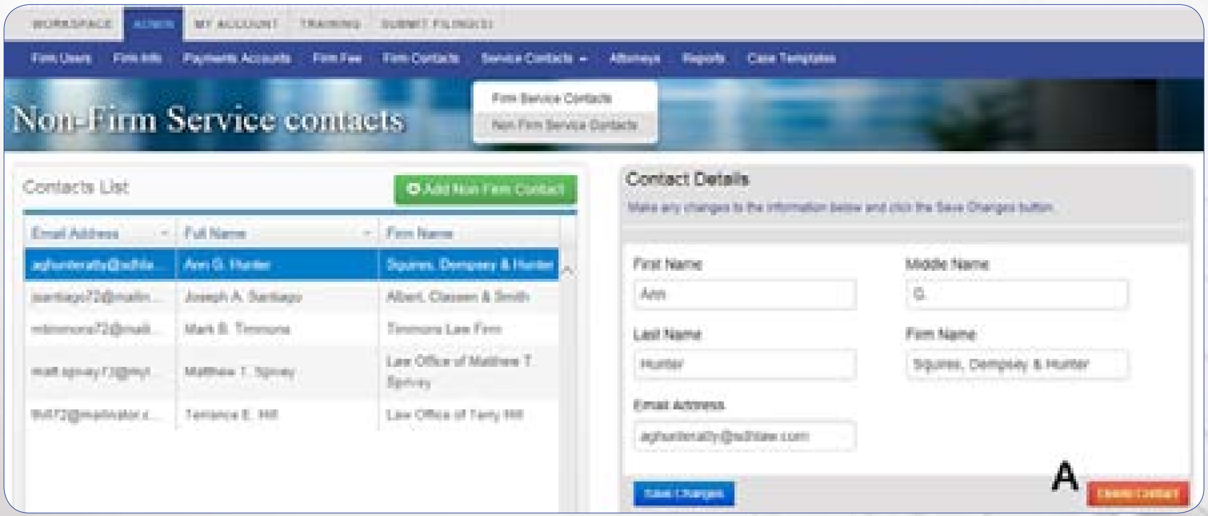


Figure 6-5, Editing and Removing Non-Firm Service Contacts

VII. Managing eFiling and eService Notification eMails

eFileCA and FileTime email send a large number of notification emails. Your firm members, especially your attorneys, may complain about the volume they receive. The following information will show you ways to:

- Opt anyone out of receiving any notification emails except Notification of Service emails,
- How to direct that certain staff members receive copies of all notification emails sent to your firm members,
- How attorneys can direct that notification emails sent to them can be sent to additional staff, and
- How your firm can direct that copies of Notification of Service emails be sent to as many additional staff members as needed.

A. Direct Emails to Other Staff Members

In the FileTime Admin feature you can add key firm contact persons and direct that copies of the notification emails sent to your firm filers are also send to the key firm contacts. The recipients that you add here do not need to be registered with the eFileCA system.

If you plan to stop notifications to one or more firm members you might want to consider using this feature to make sure copies of those emails are delivered to an email address within your firm - even if it is a generic name and email address.

The **Firm Contacts** area (**Figure 7-1**) is reached by logging into FileTime, clicking the **Admin** button and then the **Firm Contacts** button on the sub-navigation menu.

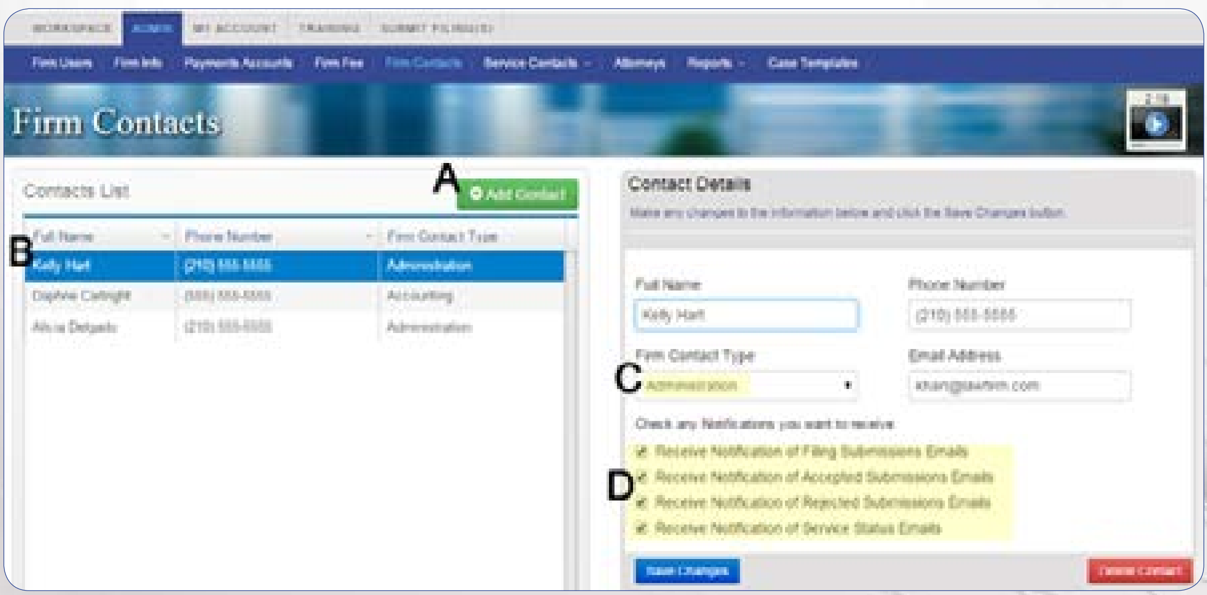


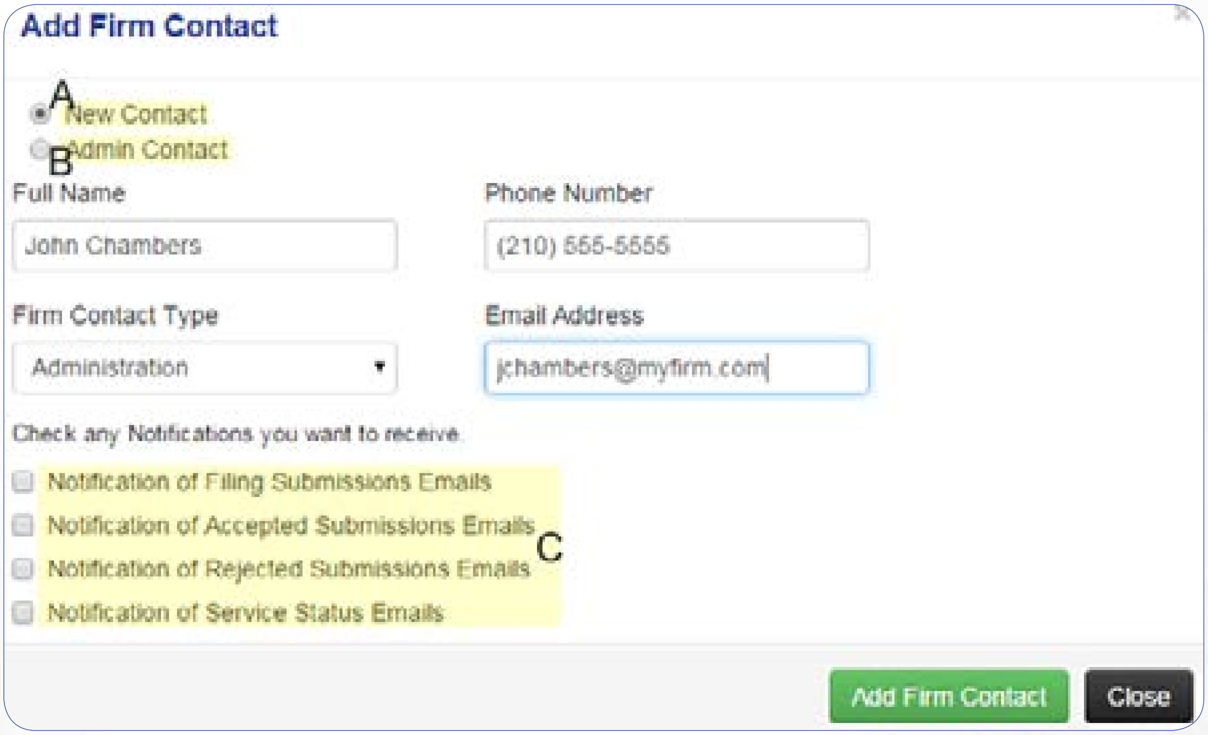
Figure 7-1, Set Up Firm Contacts and Notification Email Preferences

1. Add a New Firm Contact

Click the **Add Contact** button (Figure 7-1, A) to add a new firm contact.

In the **Add Firm Contact** window (Figure 7-2):

- Leave the default of **New Contact** (Figure 7-2, A) if you are adding a new person to the list.
- Enter the name and email address of the contact.
- Select the closest match for **Firm Contact Type**.
- Check any of the Notifications eMails you want the contact to receive (Figure 7-2, C).
- Click the **Add Firm Contact** button when done.



32

2. **Edit an Existing Firm Contact**

   Any existing **Firm Contacts** will display.

   Click the name of the Firm Contact you wish to edit. It will be highlighted (Figure 7-1, D).

   Make any changes needed in the name, email address, and/or **Firm Contact Type**.

   Check or uncheck any notification emails (Figure 7-1, C) for the contact to receive or not receive.

   Click the **Save Changes** button.

B. Direct eService Emails to Additional Firm Staff Member

As a firm eFiling administrator, login to www.filetime.com.

Click the **Admin** button (Figure 7-3, A) on the top navigation bar and then click the **Service Contacts** button on the sub-navigation bar.

On the drop-down menu, click **Firm Service Contacts** (Figure 7-3, B).

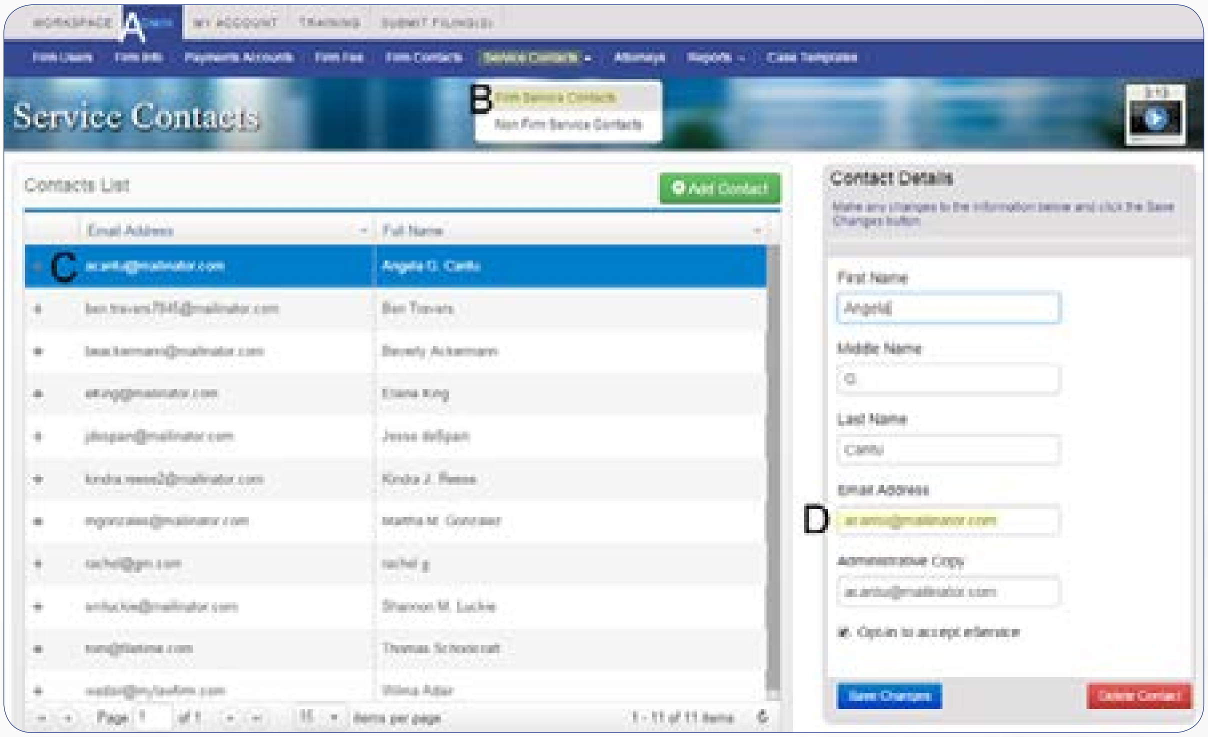


Figure 7-3, Add Administrative Copy Email Address to User

Find the name of a firm attorney to highlight his/her name (Figure 7-3, C). If he/she is not on this list, click the **Add Contact** button and add him/her.

In the **Contact Details** section on the right side, add an email address in the **Administrative Copy** area (**Figure 7-3, C**) to which additional copies of eService Notification emails should be delivered.

Click **Save Changes**.

From now on, when other firm counsel serves this attorney, an [additional copy of the notification email] will go to the **Administrative Copy** email address you just entered.

C. 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.

In section 7,B. above we showed how to add an Administrative Copy recipient but that is limited to one email address. This feature enables you to add an unlimited number of recipients.

If you add the same email address to the Administrative Copy area and to this section that individual will receive two eService Notification copies for every eService so you should choose one or the other.

To add multiple eService notification recipients:

Click **My Account** on the top navigation bar (Figure 7-4, A).

Click the down arrow to the right of the **Notification Options** button (Figure 7-4, B).

Click **eService Notification Copies** on the drop-down menu (Figure 7-4, C).

On the **eService Notification Copies** page (Figure 7-4) you will see all individuals (Figure 7-4, E), if any, already added to receive copies of eService Notification emails sent to you.

Click the **Add eService Notification** button (Figure 7-4, F) to add a new recipient.

Let FileTime guide you in adding the new recipient.

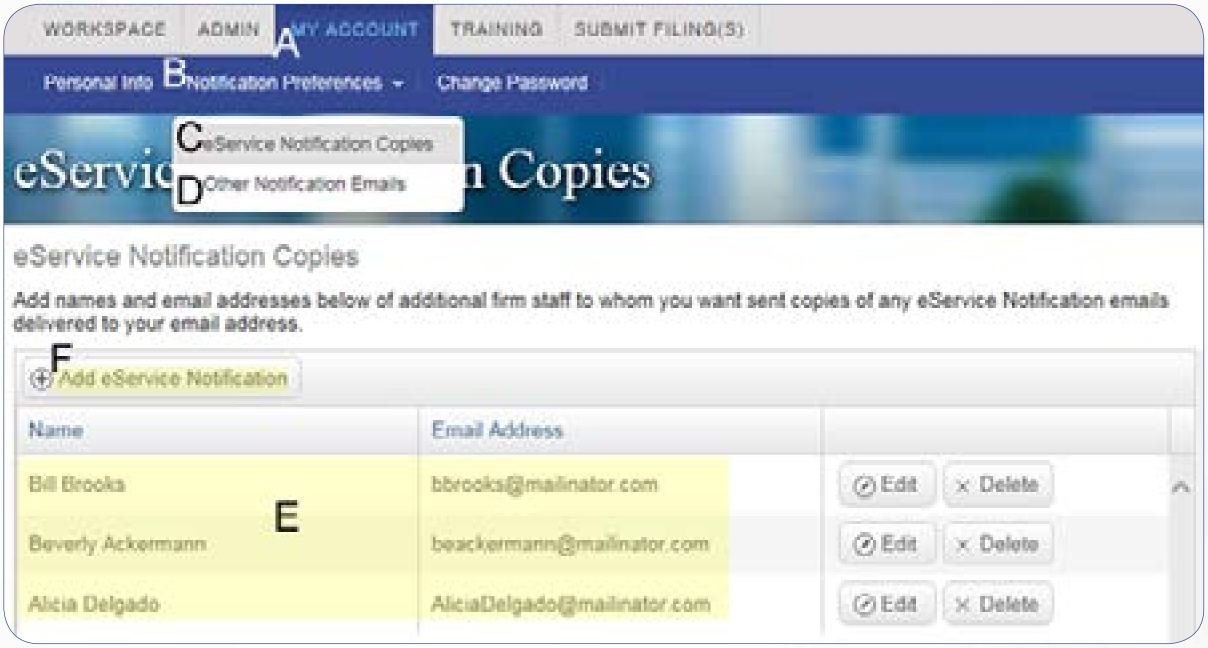


Figure 7-4, eService Notification Options

D. Customize the eService Notifications Copies List

In section C 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.

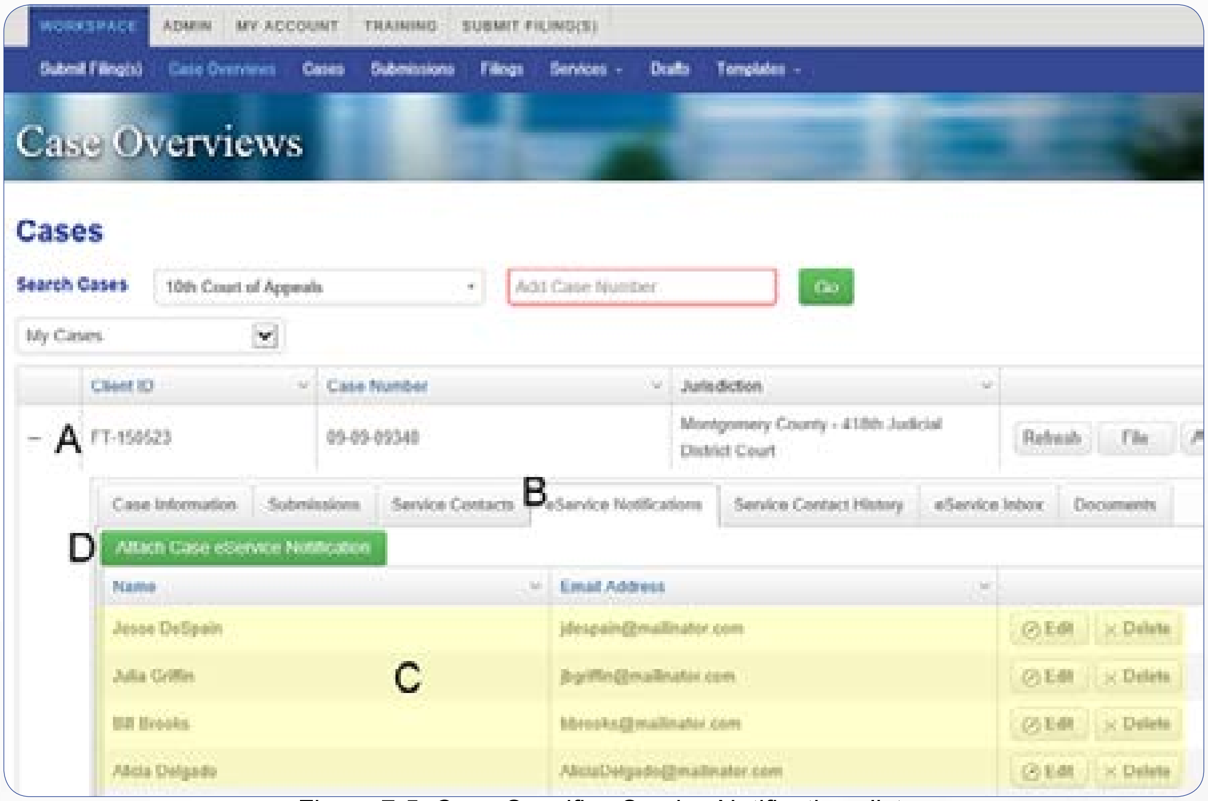


Figure 7-5, Case-Specific eService Notifications list.

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 7-5, A).

The case tabs open below the case.

Click the **eService Notifications** tab (Figure 7-5, B).

Any recipients that your firm has already added for the case will display (Figure 7-5, C).

Click the **Attach Case eService Notification** button (Figure 75, 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.

E. Select to Not Receive Specific Notification Emails

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

Click **My Account** on the top navigation bar (Figure 7-4, A).

Click the down arrow to the right of the **Notification Options** button (Figure 7-4, B).

Click **Other Notification Emails** on the drop-down menu (Figure 7-4, D).

You are now on the **Other Notification Emails** page (Figure 7-5).

There are two sections of this page.

In the top part, uncheck any notification emails that you do not want to receive:

1. **eFileCA Emails**
   - **Filing Accepted** - You receive this for every filings accepted by the clerk.

- **Filing Submitted** - You receive this after each filing is received by eFileCA 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 eFileCA 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 eFileCA 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.

Be sure to click the **Submit Changes** button after you make any changes on this section.

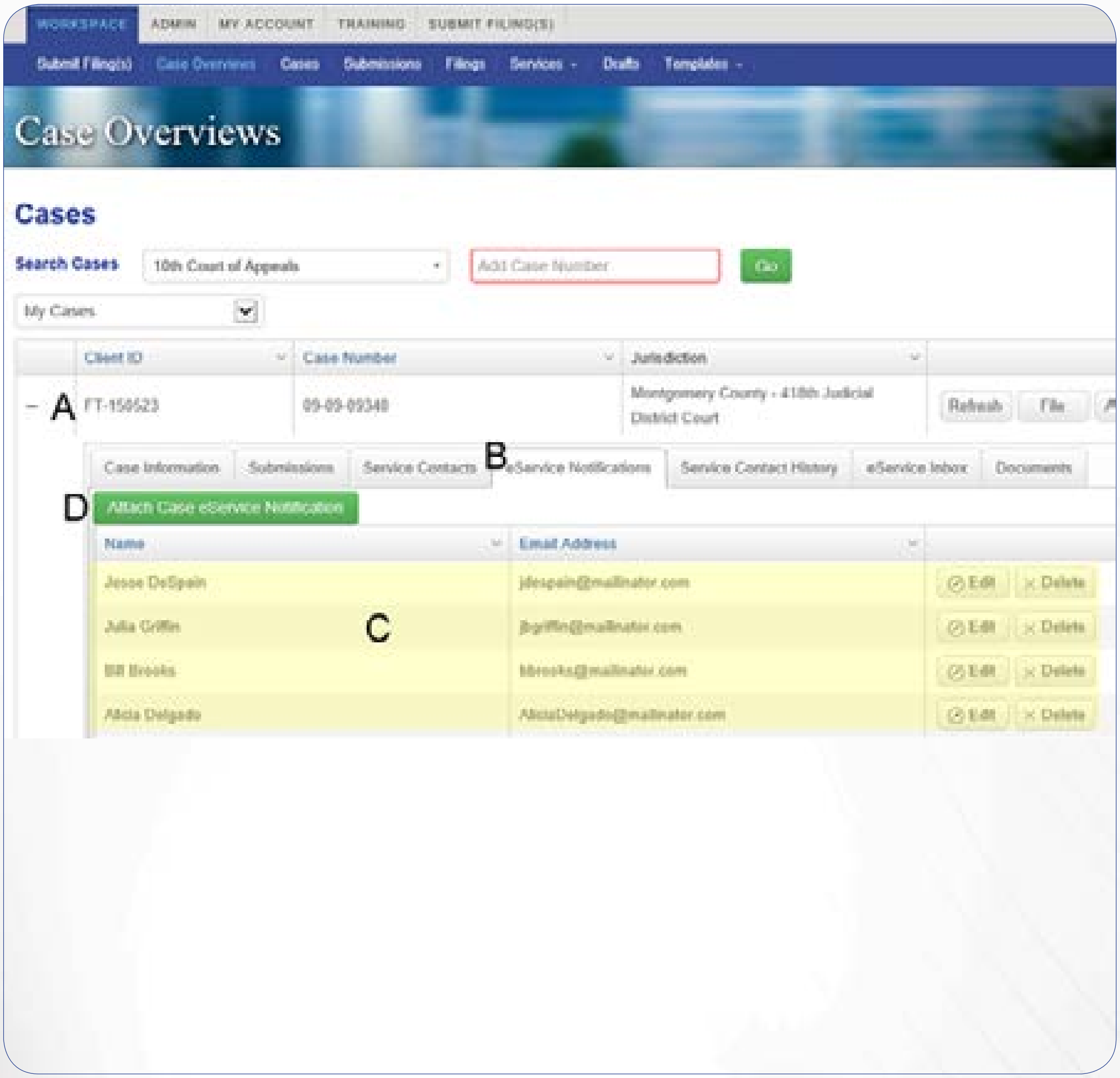


Figure 7-6, Opting Out of Notification eMails and Adding New Recipients

F. Add Recipients for all the eFileCA and FileTime Notification Emails to You

In the previous section we showed how to stop the notification emails from being sent to you.

In the **Administrative Copies** section (Figure 7-6, A) you can now tell eFileCA and FileTime to send ALL of those Notification emails to as many email addresses as you wish.

Click the **Add New Recipient** button (Figure 7-6, B).

FileTime will guide you to add a new email address to this list.

When you are done, any email address displayed in the Administrative Copies area will receive copies of ALL the eFileCA and FileTime notification emails listed above.

G. Redirect Notification Emails to Avoid the User's Inbox

If your firm uses Microsoft Outlook© as your email client, you can makes rules in each attorney's Outlook to direct any eFiling or eService notification emails to a folder other than the attorney's email In box. This will prevent him or her from seeing them at all.

Read **Configuring Rules in Microsoft Outlook to automate message handling**

Chapter 8

VIII. Generating Reports

The FileTime Reports feature provides your firm powerful tools for generating reports on virtually any aspect of your firm's eFiling and/or eService activities and Alerts. This can be for billing purposes, for case reviews, etc. Only firm eFiling administrators have access to the Reports features.

We provide your firm three major categories of report types:

- **eFilings** - These reports provide different ways to view filings, submission, and billing details for your firms activities.
- **eServices** - These reports provide you the ability to view eServices inbound to your firm by other case counsel and outbound services by your firm to other firm counsel.
- **Alerts** - These reports enable you to view firm-wide failed filings, returned for correction filings, failed eServices by your firm to other case counsel, and failed fax services.

A. Accessing the Reports Feature

Login at www.filetime.com and click the **Admin** button. If you do not see the Admin button you need to have your firm eFiling administrator assign the Admin role to you so you have access to this feature.

Click the **Reports** button on the sub-navigation bar.

The reports drop-down menu opens. Select the report type you want to generate.

Figure 8-1, Accessing The Reports Section

B. eFiling Reports

When you click eFilings on the Reports drop-down menu (Figure 8-1, A) you are taken to the **eFiling Reports** page (Figure 8-2).

We suggest that you take the time to review and generate all the report types after your firm has some eFiling submissions through FileTime. We found that firms have different requirements and one of our report types generally best meets their needs.

You won't really know which of the following reports best meet meets your needs until you run them and become familiar with them.

Figure 8-2, FileTime Report Options

1. **Quick Overview Report**

   The overview report provides you a quick overview of eFiling and/or eService activities matching your selection criteria.

   Figure 8-3 shows you the Generator page and Figure 8-4 shows a sample report.

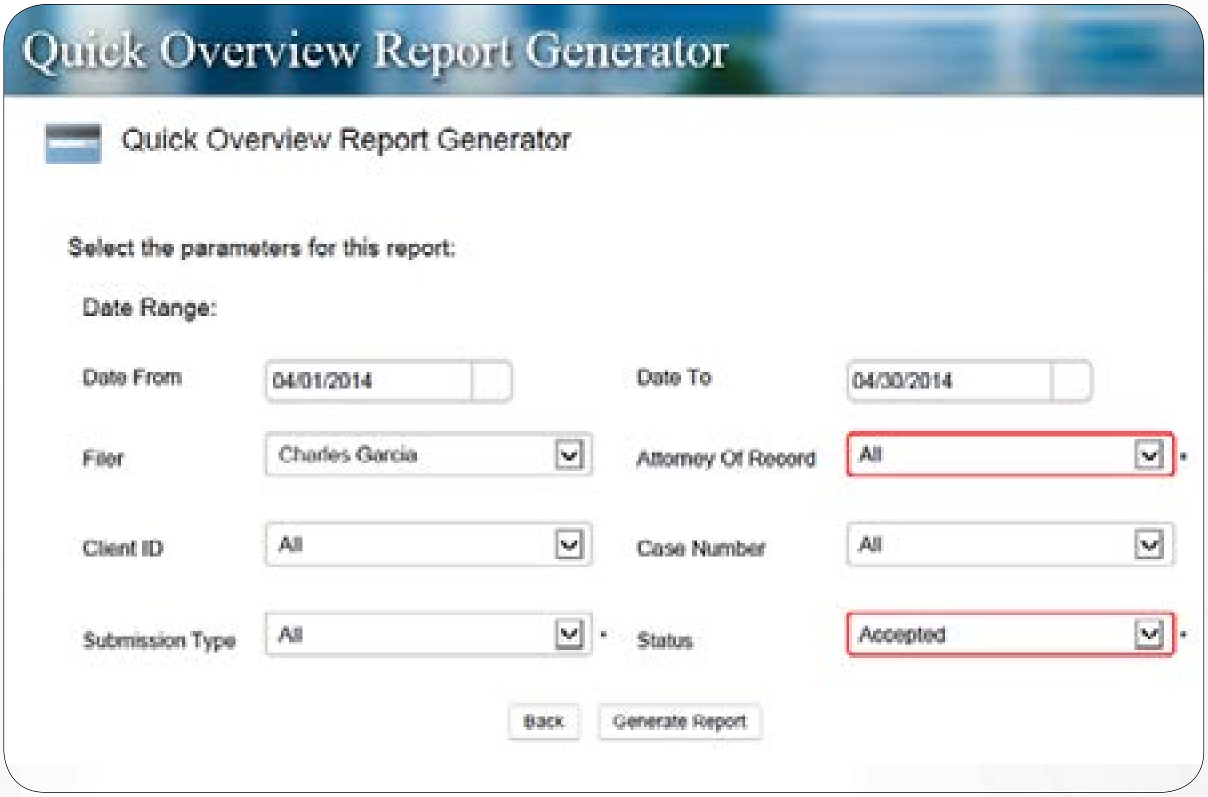
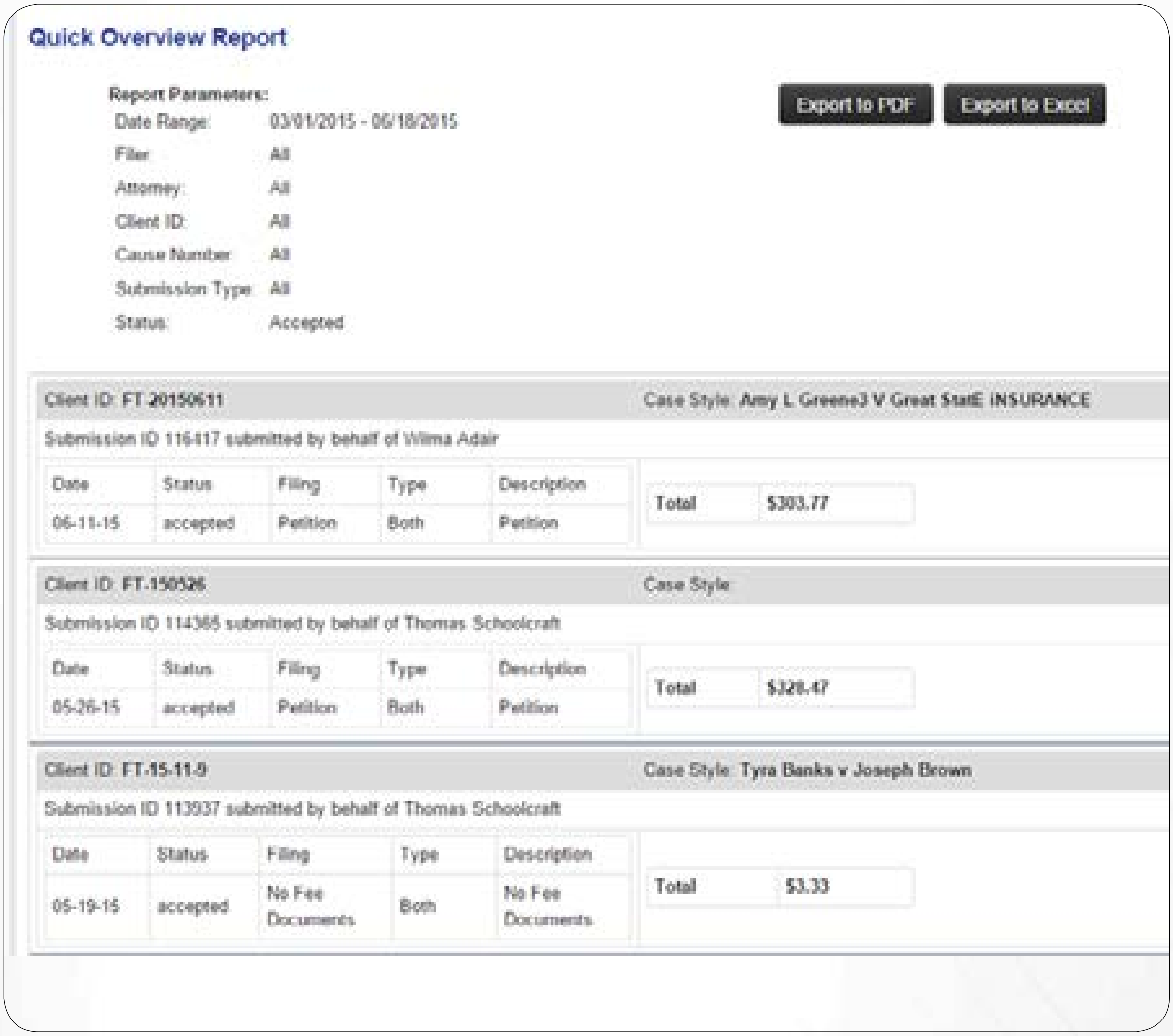


Figure 8-3, The Quick Overview Report Generator

If you require only the total fees for a submission, for instance, you may find that this concise report provides all the information you need for billing purposes.

You can export the report in PDF or Microsoft Excel format.



Quick Overview Report

Export to PDF | Export to Excel

Report Parameters:

Date Range:	03/01/2015 - 06/18/2015
Filer:	All
Attorney:	All
Client ID:	All
Cause Number:	All
Submission Type:	All
Status:	Accepted

Client ID: **FT-20150611** Case Style: **Amy L Greene3 V Great StatE INSURANCE**

Submission ID 116417 submitted by behalf of Wilma Adair

Date	Status	Filing	Type	Description
06-11-15	accepted	Petition	Both	Petition

Total	**$303.77**

Client ID: **FT-150526** Case Style:

Submission ID 114365 submitted by behalf of Thomas Schoolcraft

Date	Status	Filing	Type	Description
05-26-15	accepted	Petition	Both	Petition

Total	**$320.47**

Client ID: **FT-15-11-9** Case Style: **Tyra Banks v Joseph Brown**

Submission ID 113937 submitted by behalf of Thomas Schoolcraft

Date	Status	Filing	Type	Description
05-19-15	accepted	No Fee Documents	Both	No Fee Documents

Total	**$3.33**

Figure 8-4, Sample Quick Overview Report

2. Design Your Report

The **Design-Your-Report Generator** enables you to create a report that exactly matches your needs.

The data types that you check in the **Select Table Columns** section below (Figure 8-5, A) establishes the column headers in your report. The more data types you select the more columns you will see on your report..

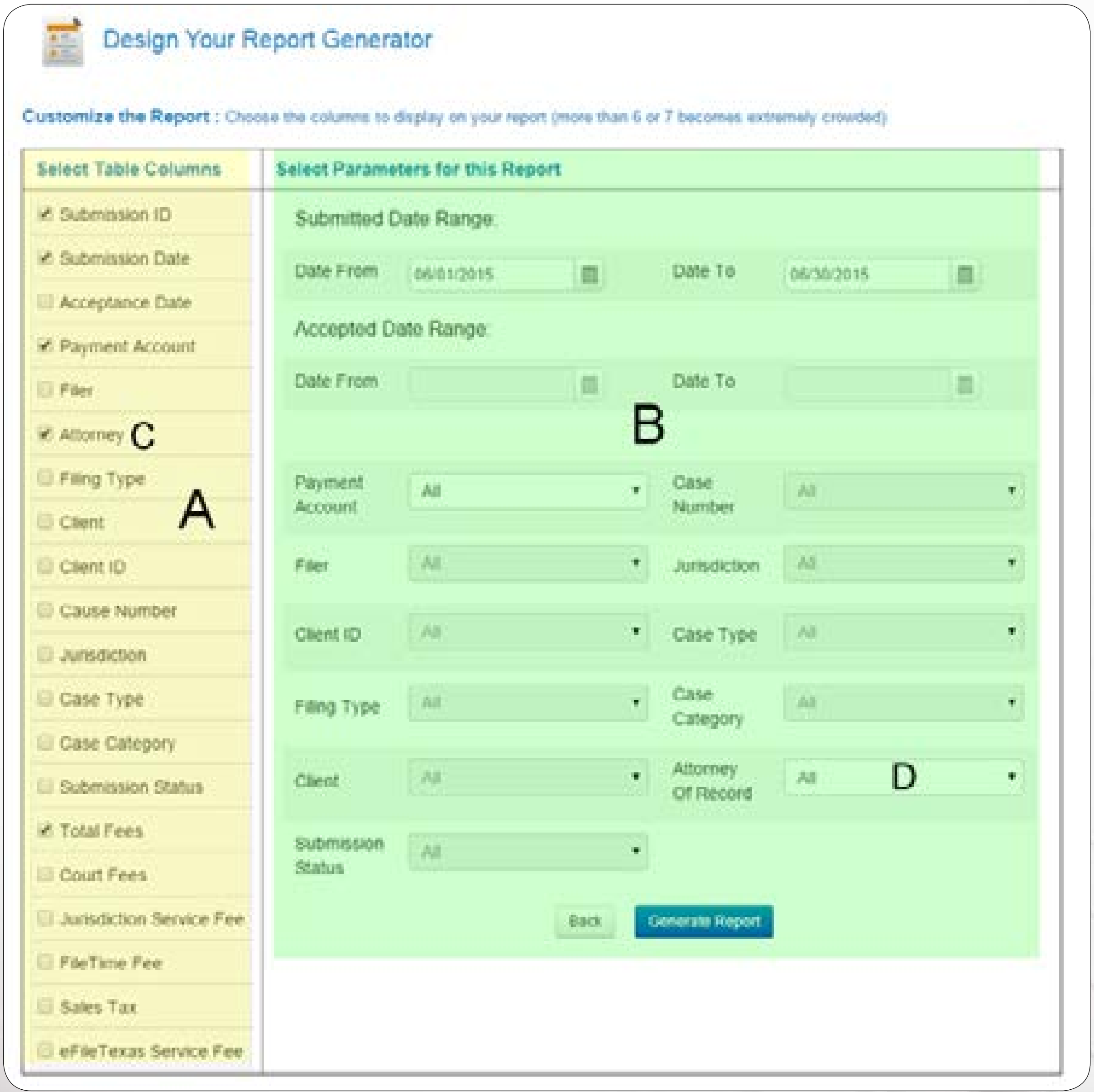
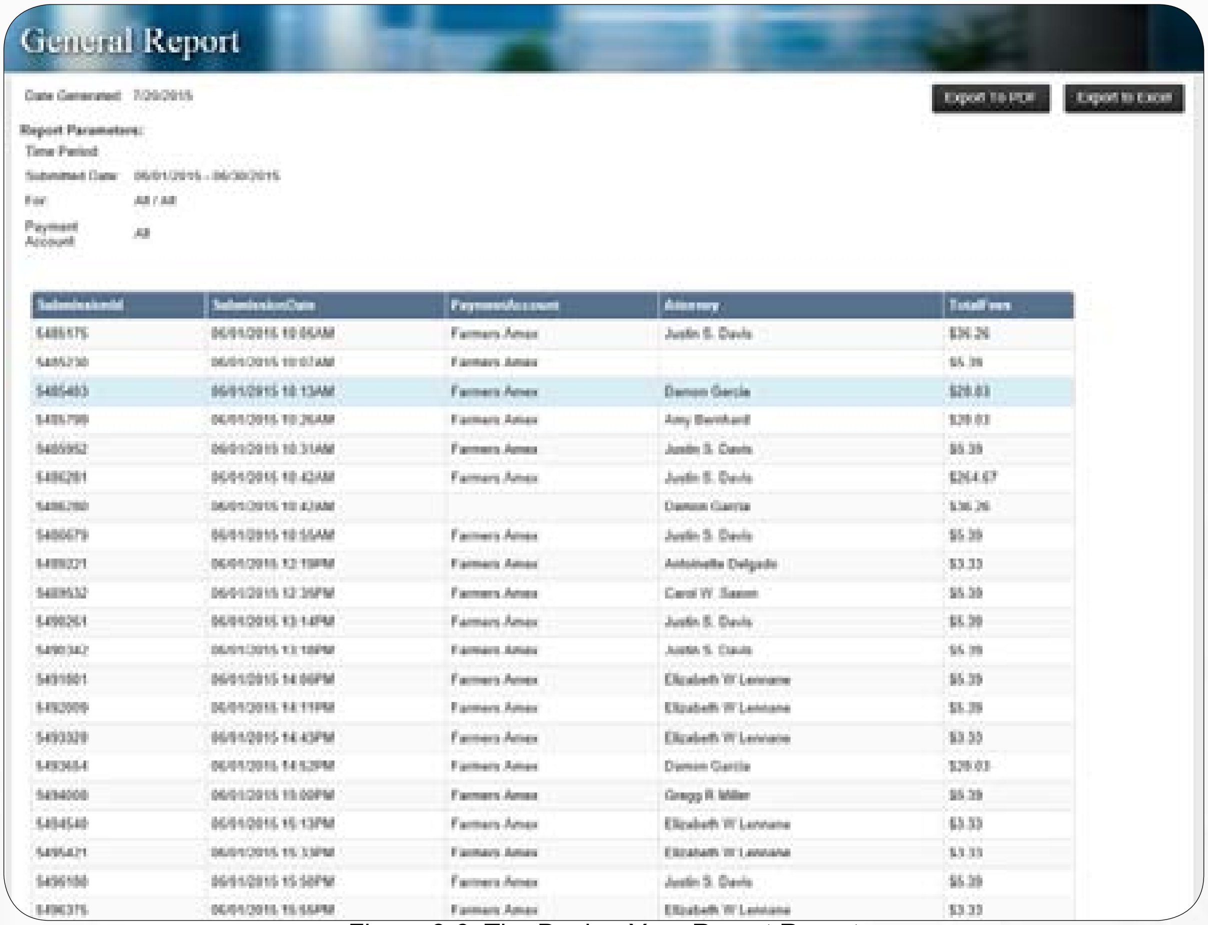


Figure 8-5, The Design-Your-Report Generator

Any data types you selected in section A above can now be filtered by the corresponding filter in section B. For example, since Attorney was selected in column A (Figure 8-5, C), the user can now choose to filter the report for a specific attorney (Figure 8-5, D), if desired. In this example the user wants to filter for all submissions by all firm attorneys for the selected date range.

If you select more than six or seven columns the initial report as you see it in Figure 8-6 will be quite crowded. However, after you export the report to Microsoft Excel® (csv) format you can then adjust the column widths to best suit your needs.

You can save this export this report to PDF file format.



General Report

Date Generated: 7/20/2015

Export To PDF | Export to Excel

Report Parameters:

Time Period

Submitted Date	06/01/2015 - 06/30/2015
For	All / All
Payment Account	All

SubmissionId	SubmissionDate	PaymentAccount	Attorney	TotalFees
5485175	06/01/2015 10:05AM	Farmers Amex	Justin S. Davis	$36.26
5485230	06/01/2015 10:07AM	Farmers Amex		$5.39
5485483	06/01/2015 10:13AM	Farmers Amex	Damon Garcia	$28.83
5485799	06/01/2015 10:26AM	Farmers Amex	Amy Bernhard	$28.83
5485952	06/01/2015 10:31AM	Farmers Amex	Justin S. Davis	$5.39
5486281	06/01/2015 10:42AM	Farmers Amex	Justin S. Davis	$264.67
5486280	06/01/2015 10:42AM		Damon Garcia	$36.26
5486679	06/01/2015 10:55AM	Farmers Amex	Justin S. Davis	$5.39
5489221	06/01/2015 12:19PM	Farmers Amex	Antoinette Delgado	$3.33
5489532	06/01/2015 12:35PM	Farmers Amex	Carol W. Saxon	$5.39
5490261	06/01/2015 13:14PM	Farmers Amex	Justin S. Davis	$5.39
5490342	06/01/2015 13:18PM	Farmers Amex	Justin S. Davis	$5.39
5491801	06/01/2015 14:06PM	Farmers Amex	Elizabeth W Lennane	$5.39
5492009	06/01/2015 14:11PM	Farmers Amex	Elizabeth W Lennane	$5.39
5493329	06/01/2015 14:43PM	Farmers Amex	Elizabeth W Lennane	$3.33
5493664	06/01/2015 14:52PM	Farmers Amex	Damon Garcia	$28.83
5494000	06/01/2015 15:00PM	Farmers Amex	Gregg R Miller	$5.39
5494540	06/01/2015 15:13PM	Farmers Amex	Elizabeth W Lennane	$3.33
5495421	06/01/2015 15:33PM	Farmers Amex	Elizabeth W Lennane	$3.33
5496180	06/01/2015 15:50PM	Farmers Amex	Justin S. Davis	$5.39
5496375	06/01/2015 15:55PM	Farmers Amex	Elizabeth W Lennane	$3.33

Figure 8-6, The Design-Your-Report Report

3. Credit Card Reconciliation Report

This option provides you a quick fairly detailed report of all accepted submissions and eService-only submissions for your firm during the date range you choose.

You can also choose to filter the report by Payment Account.

Figure 8-7, The Credit Card Reconciliation Report Generator

You can save this report in PDF or Microsoft Excel (csv) file formats.

The resulting report will resemble Figure 8-8.

Figure 8-8, Credit Card Reconciliation Report

4. **Accepted Submissions Report**

This report provides you greater control over what data is contained on your report of accepted filings for your firm than does the Credit Card Reconciliation Report. It takes more time to generate as you need to select which data fields you wish to have displayed. This report also enables you to be more selective of the data on which you wish to filter.

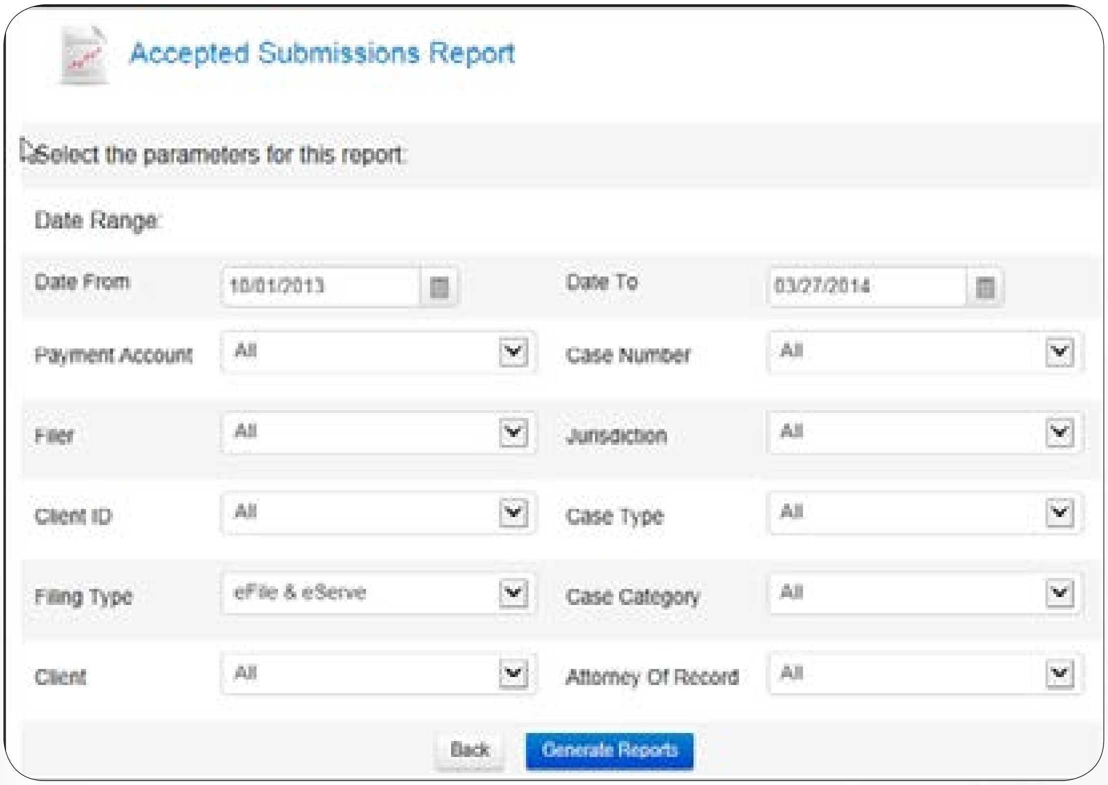
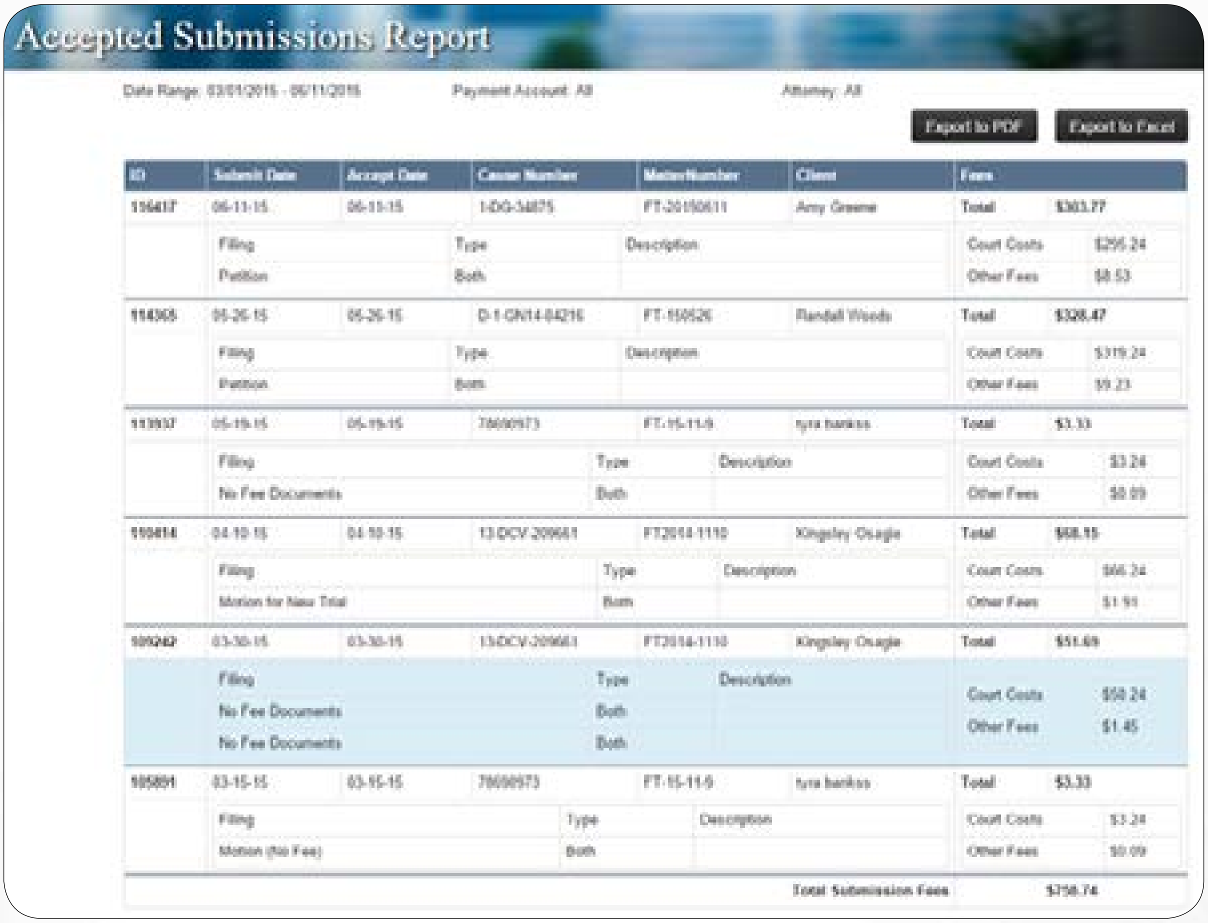


Figure 8-9, Accepted Submissions Report Generator

You can save this report in PDF format.

Figure 8-10 provides a sample report.



Accepted Submissions Report

Date Range: 03/01/2015 - 06/11/2015 Payment Account: All Attorney: All

Export to PDF Export to Excel

ID	Submit Date	Accept Date	Cause Number	MatterNumber	Client	Fees	
116417	06-11-15	06-11-15	1-DG-34875	FT-20150611	Amy Greene	Total	$303.77
	Filing	Type	Description			Court Costs	$295.24
	Petition	Both				Other Fees	$8.53
114305	05-26-15	05-26-15	D-1-GN14-04216	FT-150526	Randall Woods	Total	$328.47
	Filing	Type	Description			Court Costs	$319.24
	Petition	Both				Other Fees	$9.23
113937	05-19-15	05-19-15	78690973	FT-15-11-9	tyra bankss	Total	$3.33
	Filing	Type	Description			Court Costs	$3.24
	No Fee Documents	Both				Other Fees	$0.09
110414	04-10-15	04-10-15	13-DCV-209661	FT2014-1110	Kingsley Osagie	Total	$68.15
	Filing	Type	Description			Court Costs	$66.24
	Motion for New Trial	Both				Other Fees	$1.91
109242	03-30-15	03-30-15	13-DCV-209661	FT2014-1110	Kingsley Osagie	Total	$51.69
	Filing	Type	Description				
	No Fee Documents	Both				Court Costs	$50.24
	No Fee Documents	Both				Other Fees	$1.45
105891	03-15-15	03-15-15	78690973	FT-15-11-9	tyra bankss	Total	$3.33
	Filing	Type	Description			Court Costs	$3.24
	Motion (No Fee)	Both				Other Fees	$0.09
					Total Submission Fees		$758.74

Figure 8-10, Sample Accepted Submissions Report

5. Accepted Filing Billing Report

Use this report to bill each case individual filings rather that by submission if that is your desire. Most firms bill by submission.

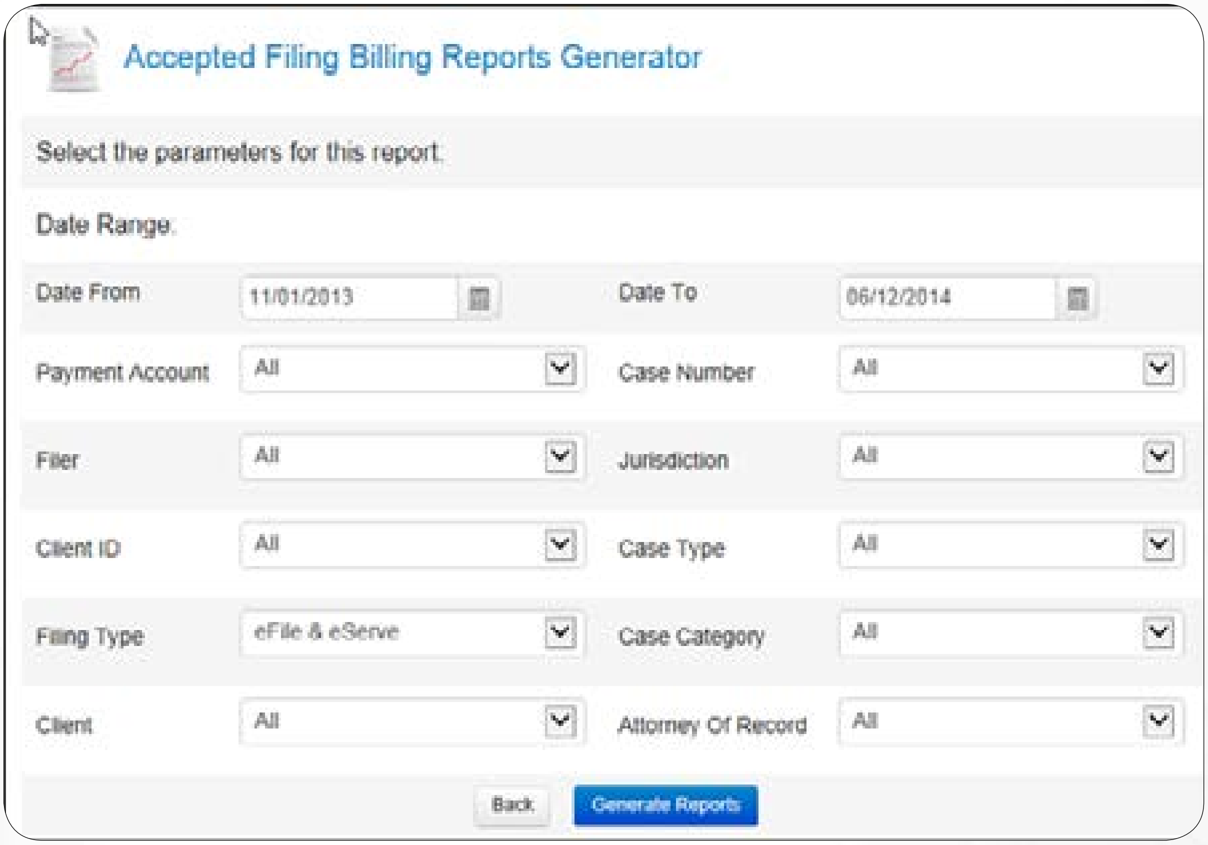


Figure 8-11, Accepted Filings Billing Report

By using the appropriate filtering parameters you can create a wide range of reports such as all filings by all firm members during a specified time period.

You can save this report in PDF or Microsoft Excel® (csv) format. View a sample PDF report here.

Accepted Filings Billing Report

Submission Acceptance Date Range: 03/01/2015 - 05/15/2015   Payment Account: All   Attorney: All

Export to PDF   Export to Excel

ID	Submission Date	Acceptance Date	Attorney	Cause Number	MatterNumber	Fees	
113789	05-15-15		Thomas Schoolcraft	201212345	FT20140819	Total	$0.00
	Filing	Type	Description	Status		Court	$0.00
	Service Only	EService		served		Other	$0.00
113656	05-13-15	05-13-15	Wilma Adair	13-DCV-209661	FT2014-1110	Total	$0.00
	Filing	Type	Description	Status		Court	$0.00
	Service Only	EService		served		Other	$0.00
110414	04-10-15	04-10-15	Wilma Adair	13-DCV-209661	FT2014-1110	Total	$68.15
	Filing	Type	Description	Status		Court	$66.24
	Motion for New Trial	Both		accepted		Other	$1.91
109242	03-30-15	03-30-15	Wilma Adair	13-DCV-209661	FT2014-1110	Total	$51.69
	Filing	Type	Description	Status		Court	$50.24
	No Fee Documents	Both		accepted		Other	$1.45
	No Fee Documents	Both		accepted			
105891	03-15-15	03-15-15	Thomas Schoolcraft	78690973	FT-15-11-9	Total	$3.33
	Filing	Type	Description	Status		Court	$3.24
	Motion (No Fee)	Both		accepted		Other	$0.09
					Total Submission Fees		$123.17

Figure 8-12, Sample Accepted Filings Billing Report

6. Individual Filing Report

Use this generate a separate, detailed, one-page report on each filing matching your filtering criteria.

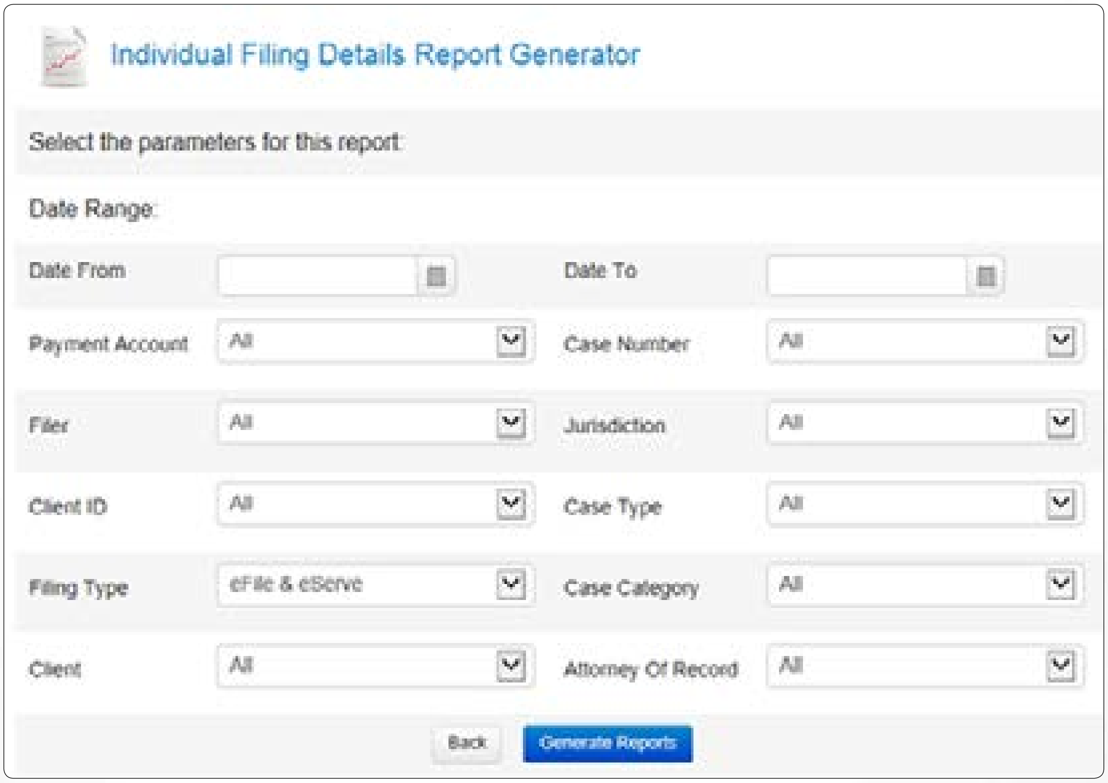


Figure 8-13, Individual Filings Report Generator

You can save this report in PDF format.

Each filing prints on a separate page and each page would resemble the following:

Figure 8-14, Sample Individual Filings Report

7. Export Report Generator

Use this feature to generate a report that you can save as a CSV file for importing the data into your firm's case management system.

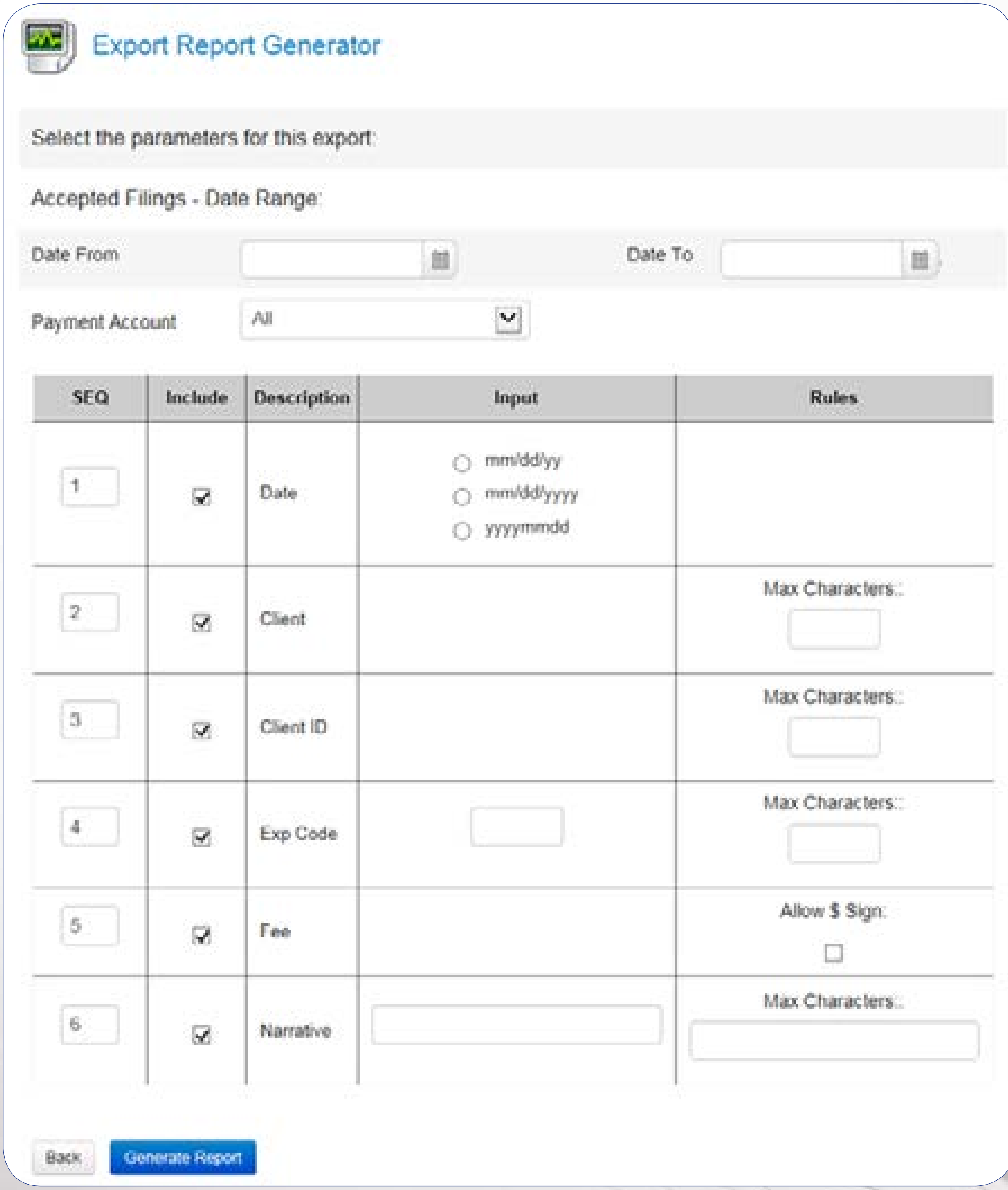


Figure 8-15, Export Report Generator

The data provided by default in this report is:

- **SEQ** - The Sequence column shows the order in which the data will display left-to-right in column format in your report
- **Include** - Uncheck the check box in this column to exclude the data in that row in your report.

- **Input** - This column provides a way for you to control the output format for:
  - **Date** – select the date formation you prefer
  - **Exp Code** – Enter the Expense code used in your case management system for billing eFilings.
  - **Narrative** – Enter whatever narrative you want to display for each filing billing
- **Rules** – This column enables you to define any data issues for the data for the row.
  - Set the maximum number of characters for specific data row if your case management system limits the number of characters for that data.
  - Select whether we should parse out $ for the Fees data as it is exported to the report.

Depending on the options you chose for the report it might resemble the following (Figure 8-65):

Report Export Generate

Report Export - Results

Export To Excel

Created: : 6/17/2015

Firm: : Law Office of Tom Schoolcraft

Report Criteria:

Time Period: : 4/1/2015 12:00:00 AM - 5/17/2015 11:59:59 PM

Payment Account: : All

Submission ID	Date	Client	Client ID	Exp Code	Fee	Narrative
113656	05-13-15	Kingsley Osagie	FT2014-1110	10-156	0.00	eFile and eService Fee
110414	04-10-15	Kingsley Osagie	FT2014-1110	10-156	68.15	eFile and eService Fee
Total:					68.15	

Figure 8-16, Sample General Report

C. eServices Reports

The eServices reports (Figure 8-17) enable you to view a list of eServices to your firm filers from case counsel (the Inbox) and eServices from your firm to other case counsel (Outbox).

Figure 8-17, eServices Reports

1. **Inbox Reports**

The Inbox report provides you a report of all eServices to your firm service contacts that match the filter criteria.

For example, if you are told that your firm was eServed by counsel in a case on a certain day and you are pretty certain that no one in your firm received the service, you could use this report and filter for all eServices received on that date, or for a date range, for the specific case.

In other instances, a firm administrator might run this report every morning, filtering for all inbound eServices firm-wide received the previous day. The purpose being to not overlook any inbound eServices.

You can filter the **Inbox Report** as shown in Figure 8-18.

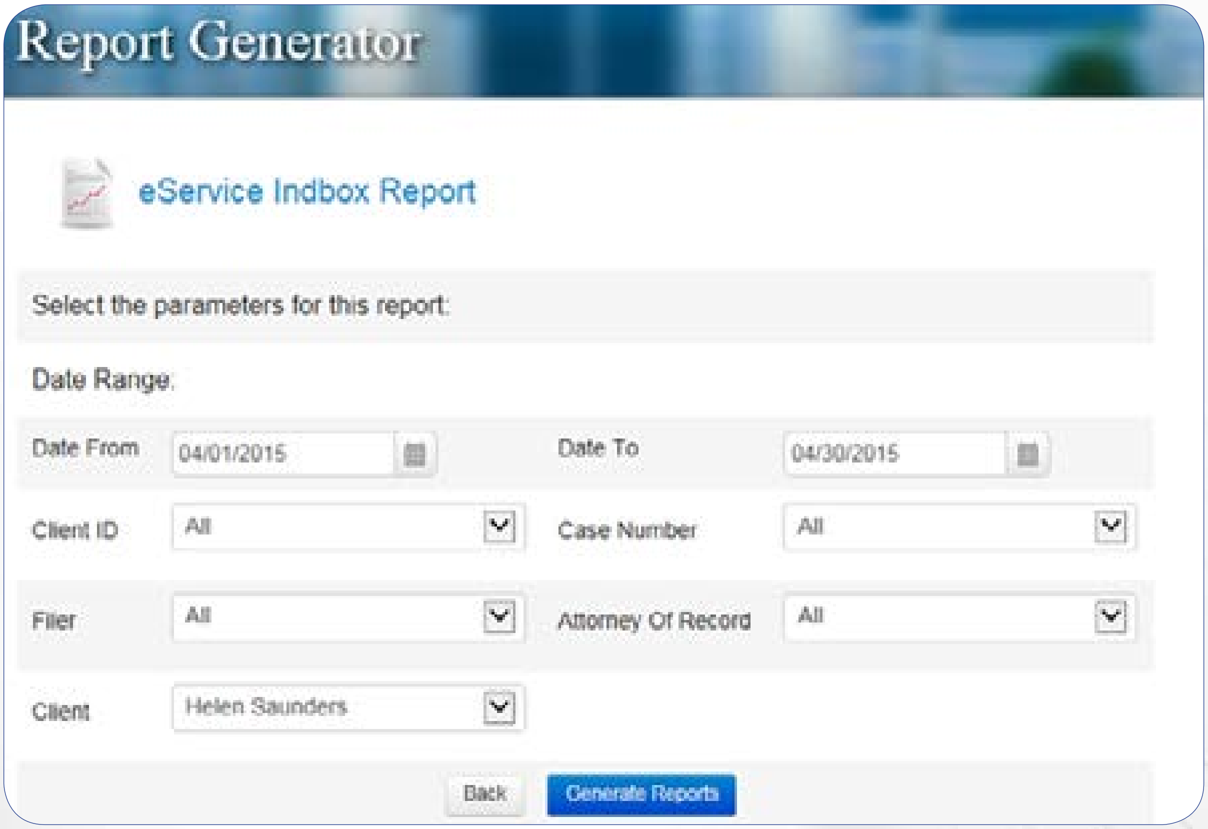


Figure 8-18, eService Inbox Report Generator

Enter your filtering criteria and click the **Generate Report** button.

Your report will resemble Figure 8-19.

eService Inbox Report

Date Range: 04/01/2015 - 04/30/2015 Client ID: All Case Number: All
Filer: All Attorney: All Client: Helen Saunders

Export to PDF Export to Excel

Served Date	Case Number	Jurisdiction	Attorney	Firm	Document
04/01/15	DC-14-12214	Dallas County - 191st District Court	Gabriela Valadez	Gabriela's Law Firm	Request for Production.pdf
04/01/15	DC-14-12214	Dallas County - 191st District Court	Gabriela Valadez	Gabriela's Law Firm	Request for Production.pdf
04/05/15	DC-14-12214	Dallas County - 191st District Court	Charles Smith	Smith, Peabody, and Brown	Motion for Discovery.pdf
04/05/15	DC-14-12214	Dallas County - 191st District Court	Charles Smith	Smith, Peabody, and Brown	Motion for Discovery.pdf
04/27/15	DC-14-12214	Dallas County - 191st District Court	Kindra Reese	Law Office of Tom Schoolcraft	Motion for Voir Dire of Expert Witnesses.pdf

Figure 8-19, eService Inbox Report

2. Outbox Reports

The eService Outbox Report Generator enables you to generate firm-wide reports of eService from your firm to other case counsel.

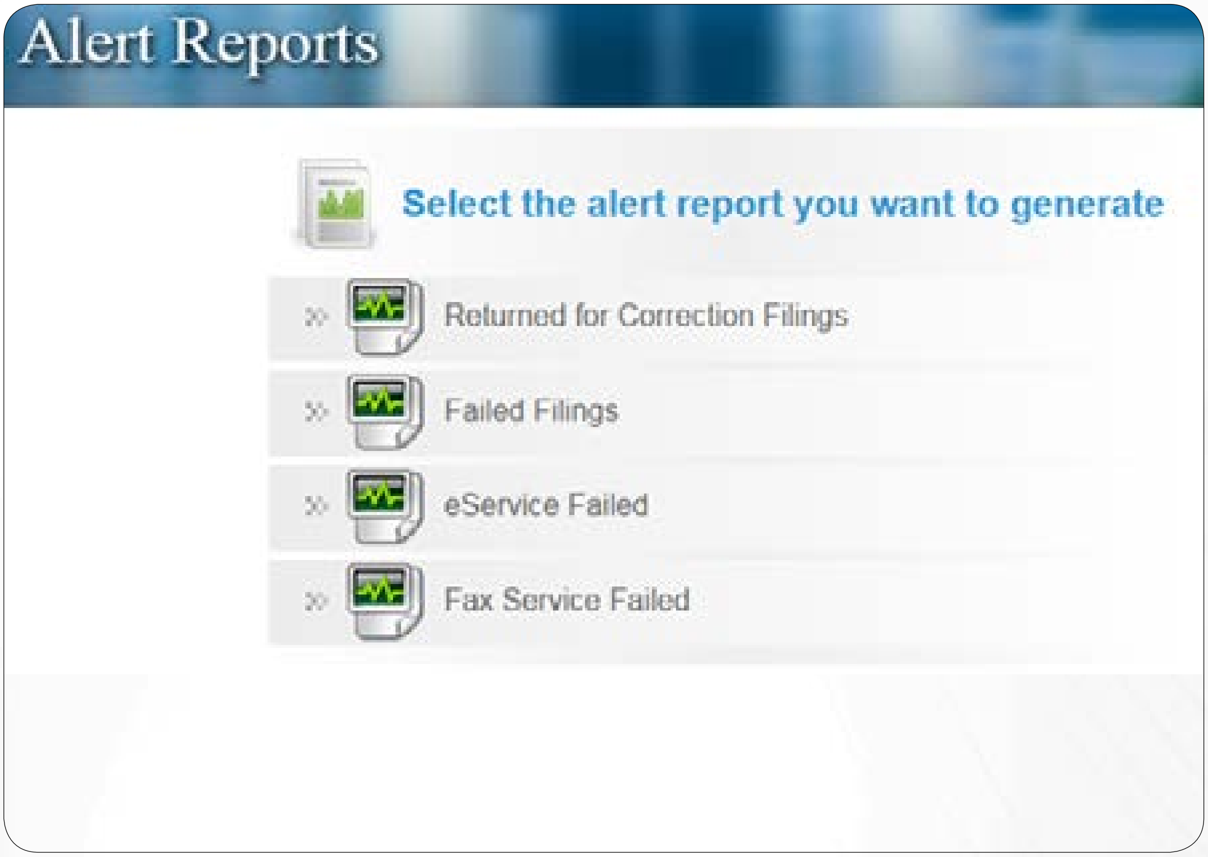


Figure 8-21, eService Outbox Report Generator

The report displays the following information for each eService that meets your search criteria:

- Date
- Client ID
- Case Number
- Recipient
- Document Served, and
- The status of each eService.

Generate this report in the same manner that you generate the eService Inbox Report.

View a sample report in Figure 8-22.

eService Outbox Report

Date Range: 06/01/2015 - 06/30/2015   Client ID: All   Case Number: All

Filer: All   Attorney: All   Client: All

Date	Client ID	Case Number	Recipient	Document	Status
06/01/15		C-1230-15-C		DOA Casarez v Farmers.pdf | Stamped__DOA Casarez v Farmers.pdf |	
06/01/15		2015CVT000713D1		Rule 11 Agreement_Settlement_Serna.pdf | Stamped__Rule 11 Agreement_Settlement_Serna.pdf |	
06/01/15		2014-CCL-01028		DOA Bak v Farmers.pdf | Stamped__DOA Bak v Farmers.pdf |	
06/01/15		CL-15-1330-E		DOA E Infante.pdf | Stamped__DOA E Infante.pdf |	
06/01/15		CL-15-1689-H		20150601102440226.pdf | Stamped__20150601102440226.pdf |	
06/01/15		CL-15-1709-D		20150601103232633.pdf | Stamped__20150601103232633.pdf |	
06/01/15		DC-15-275		DOA Laura L Rodriguez.pdf | Stamped__DOA Laura L Rodriguez.pdf |	
06/01/15		CL-15-1689-H		20150601104424603.pdf | Stamped__20150601104424603.pdf |	
06/01/15		2012CCV-62205-2		Notice of Name Change - tpi.pdf | Stamped__Notice of Name Change - tpi.pdf |	
06/01/15		2014CVT001205D3		Charge.pdf | Stamped__Charge.pdf |	
06/01/15		CL-15-1709-D		20150601130857905.pdf | Stamped__20150601130857905.pdf |	
06/01/15		CL-15-1709-D		20150601131211507.pdf | Stamped__20150601131211507.pdf |	
06/01/15		2014CI02665		Notice of Name Change_Dixon.pdf | Stamped__Notice of Name Change_Dixon.pdf |	
06/01/15		14-05-0316-CVW		Vacation Letter_Kosinowski.pdf | Stamped__Vacation Letter_Kosinowski.pdf |	
06/01/15		389458		Vacation Letter_Mares.pdf | Stamped__Vacation Letter_Mares.pdf |	
06/01/15		2015-CCL-00256		First Amended Answer.pdf | Stamped__First Amended Answer.pdf |	
06/01/15		2012CI14430		Motion to Enter Judgment.pdf | Stamped__Motion to Enter Judgment.pdf |	
06/01/15		390131		Vacation Letter_Markgraf.pdf | Stamped__Vacation Letter_Markgraf.pdf |	

Figure 8-22, eService Outbox Report

D. Alerts Reports

The FileTime Alerts Manager provides a fast and easy way to view eFiling and eService issues firm-wide or for a specific filer or attorney.

We designed these reports for firms that want to assign someone to run the reports on a regular schedule to make sure that no failed filings, eServices, or fax services drop through the cracks.

To generate these reports click the **Alerts** option (Figure 8-1, C) on the **Reports** drop-down menu.

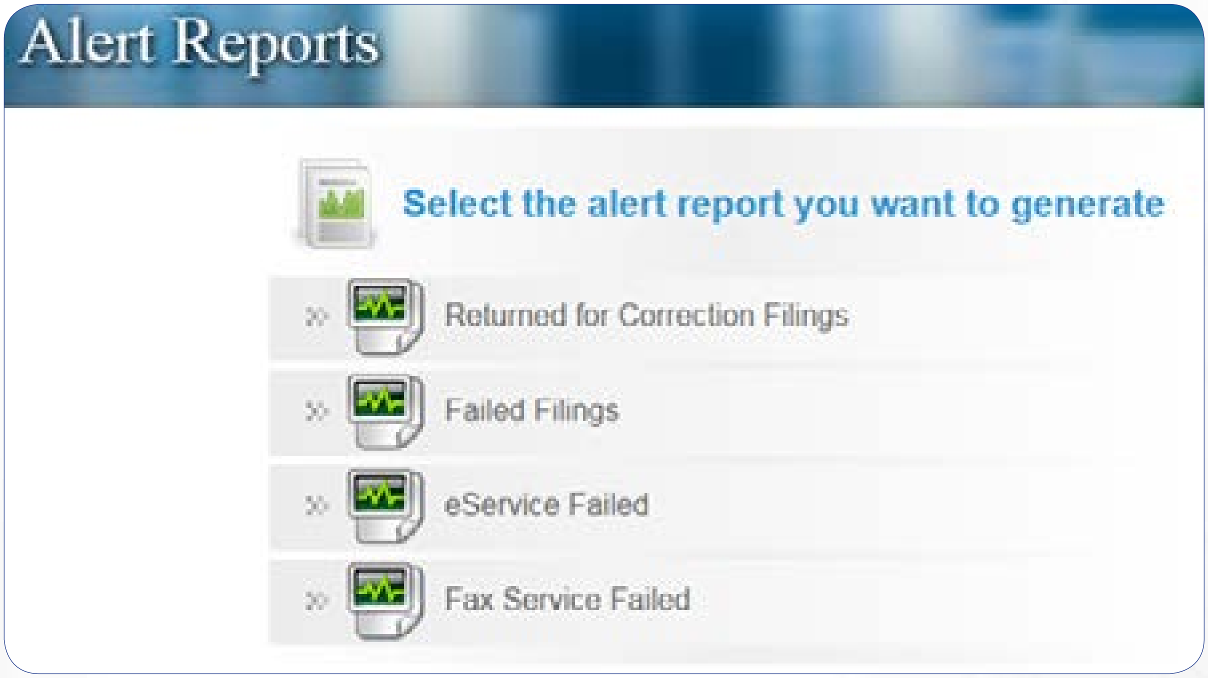


Figure 8-23, Alerts Reports Options

View details about each of the above reports on the following pages.

1. **Returned for Correction Filings**

   This report enables you to view a listing of firm submissions Returned for Correction by the Clerk of Court. You can filter the report criteria based on multiple criteria. You can also choose to view all Returned for Correction submissions or only the ones that have not been resubmitted.

Figure 8-24, Returned for Correction Report Generator

All Returned for Correction filings meeting your search criteria are displayed on the report (Figure 8-25).

Fillings already resubmitted display a status of **Resubmitted**.

Filings that have not yet been resubmitted display a status of **Pending**.

Figure 8-25, Returned for Correction Report

2. Failed Filings

This report provides you a list of all submissions failed by the eFileCA system based on the parameters you provide. You can even filter to see which ones have not been resubmitted.

Figure 8-26 shows the report generator page.

Figure 8-26, Failed Filings Report Generator

The resulting report (Figure 8-27) displays the basic info to identify the failed filing(s).

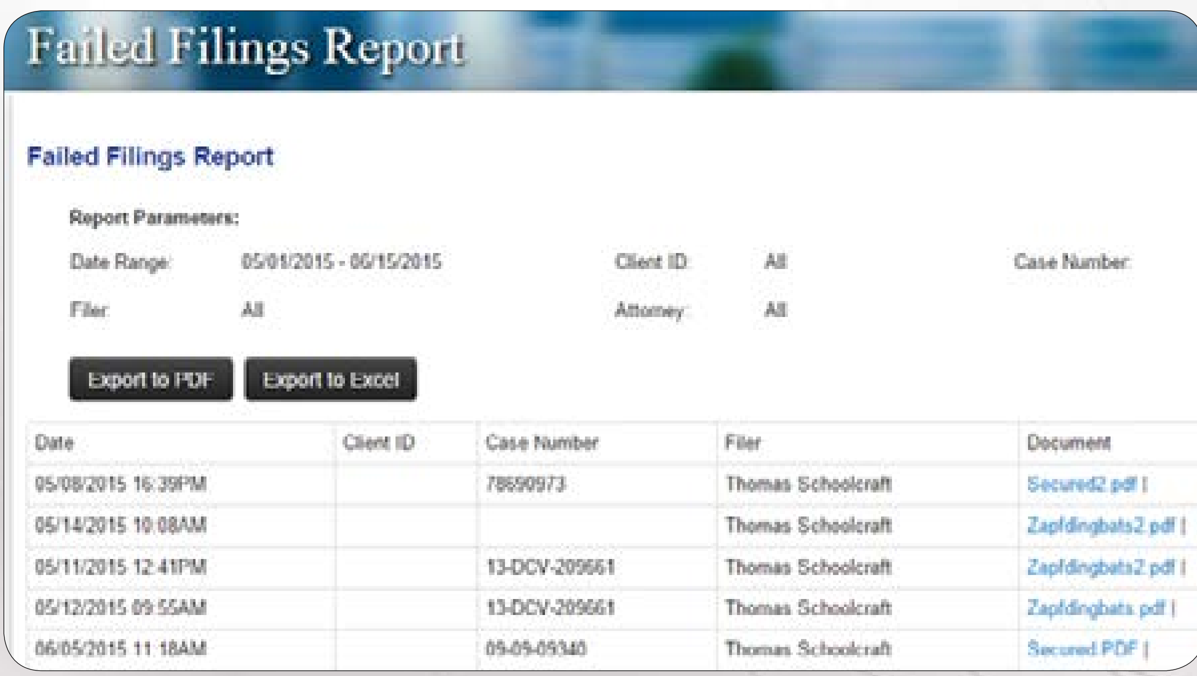


Figure 8-27, Failed Filings Report

3. eService Failed

This report provides you a list of eServices that eFileCA was not able to deliver to the intended recipient.

Please note that the generator page (Figure 8-28) displays the usual filtering criteria. It also includes the ability to filter by the intended recipient to whom the eService failed.

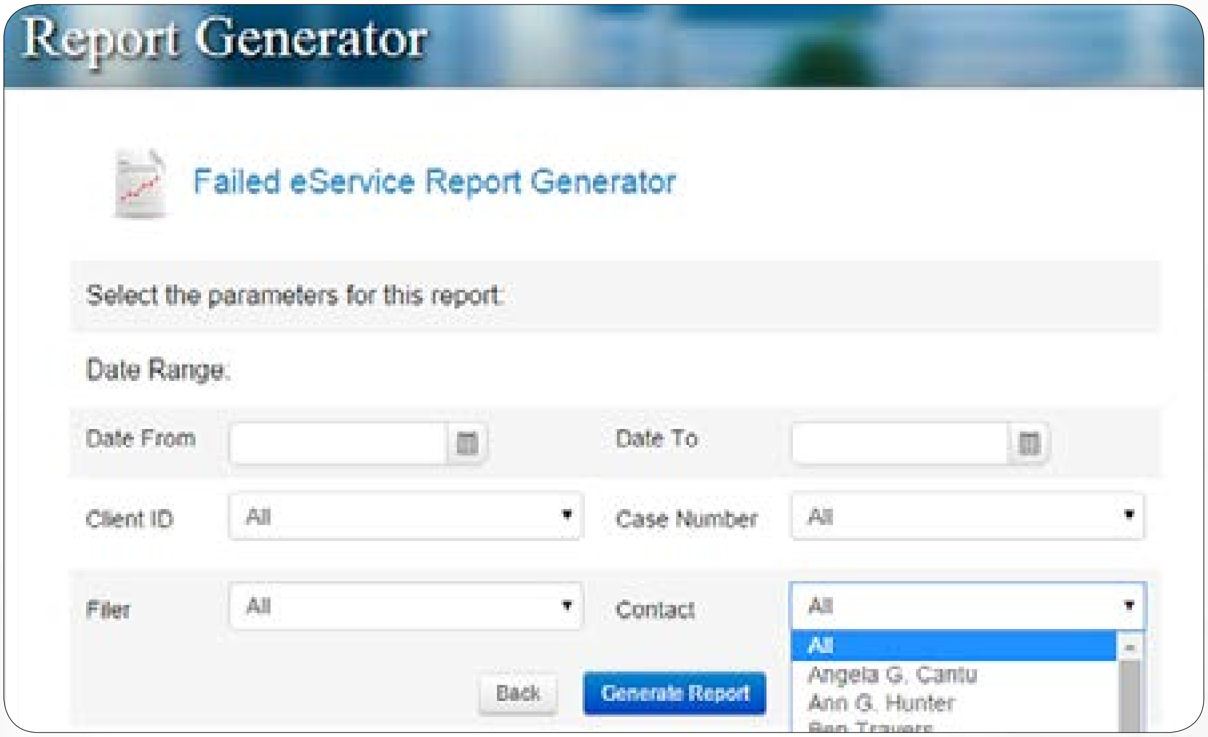


Figure 8-28, Failed eService Report Generator

Figure 8-29 shows a typical failed eService report.

Figure 8-29, Failed eService Report

4. **Fax Service Failed**

This report provides you a list of FileTime fax services that failed.

Complete the filtering criteria on the generator page and click the **Generate Report** button.

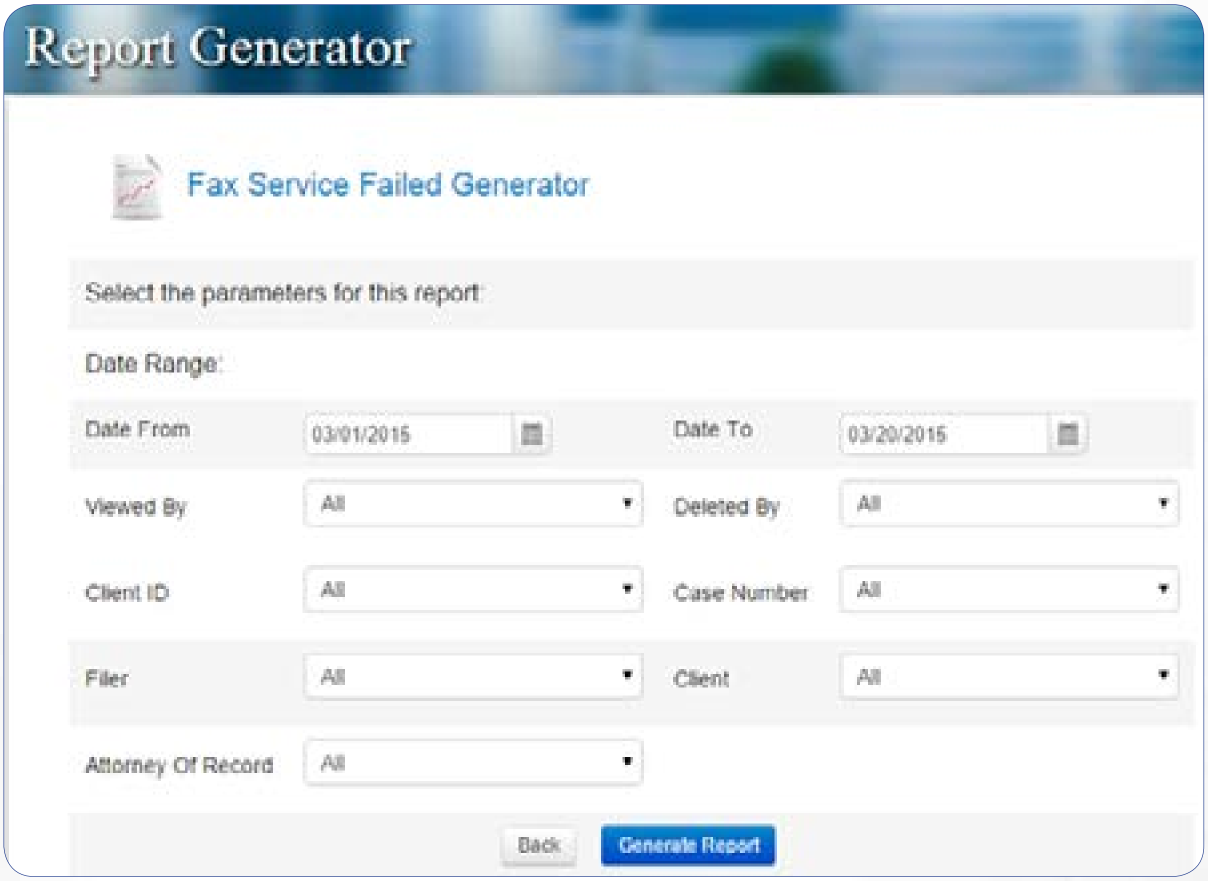


Figure 8-30, Failed Fax Service Report Generator

And FileTime generates a report firm-wide of any failed fax services.

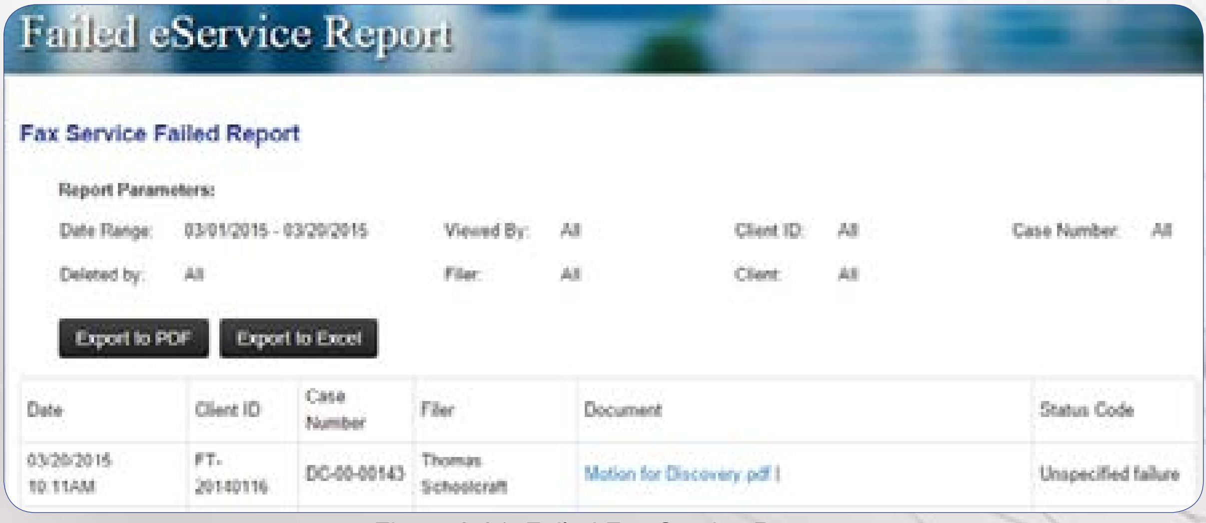


Figure 8-31, Failed Fax Service Report

Chapter 9

IX. 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

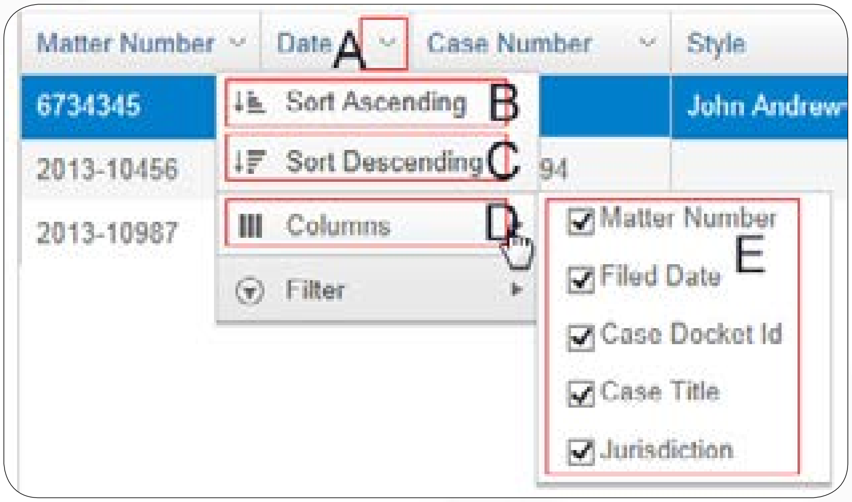
You will find a filer like the one below (Figure 9-1) on the Case Overviews, Cases, Submissions, and Filings pages. Most of your firm filers will probably be interested in seeing only their own Cases, Submissions, or Filings.

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.

Figure 9-1, Firm/Personal Filter

A. Sorting Grid Columns

Click the icon (Figure 9-2, A) to open the options shown in Figure 9-2.



9-2, Grid Sorting and Display Options

Click the **Sort Ascending** button (Figure 9-2, B) to organize all the rows of data in that column in **Ascending** order.

Click the **Sort Descending** button (Figure 9-2, C) to organize all the rows of data in that column in **Descending** order.

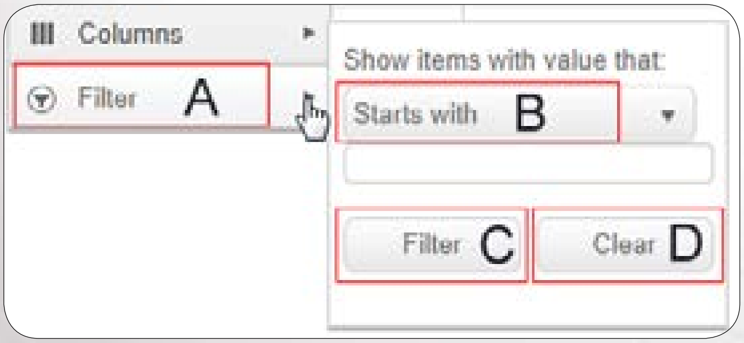
A. Customizing Grid Columns

You can also control which columns display on your grids. The columns that are checked (Figure 9-2, E) will display. Let us know if you want to see other options and we can add them in a future update.

A. Searching in Grids

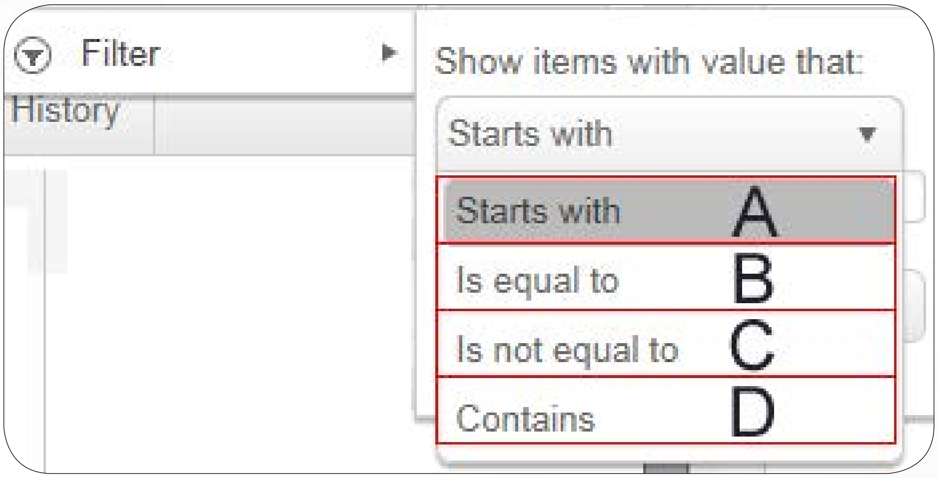
Use the FileTime filtering options to quickly find the specific case, name, email address, etc. in the appropriate grid column.

Clicking the **Filter** button (Figure 9-3, A) opens powerful search/filtering capabilities to you.



9-3, Searching the Column

1. **The Filter-type (Figure 9-3, B) button provides you four options:**



9-4, Filtering Options

- **Starts with (**Figure 9-4, A**)** - Select this choice and you will filter for any records that start with the data you enter in Figure 9-3, C.
- **Is not equal to (**Figure 9-4, 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 9-4, C**)** - Select this option and only records that are exact matches to what you enter into **C** will be displayed.
- **Contains (**Figure 9-4, 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 9-3, C).

1. **Enter your search criteria in the Filter Criteria field (Figure 9-3, 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.

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

   Click the **Filter** button (Figure 9-3, 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 9-3, E) to clear all the selections you made above and start over.

A. 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.

9-5, Drill Down for Case Information

Click the ‣ icon (Figure 9-5, A) in the left column of the row you wish to drill-down. That opens the case tabs for that case (Figure 9-5, 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 9-5, C).

A. 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 9-6) of the grid provides ways to quickly view all the rows on the grid.

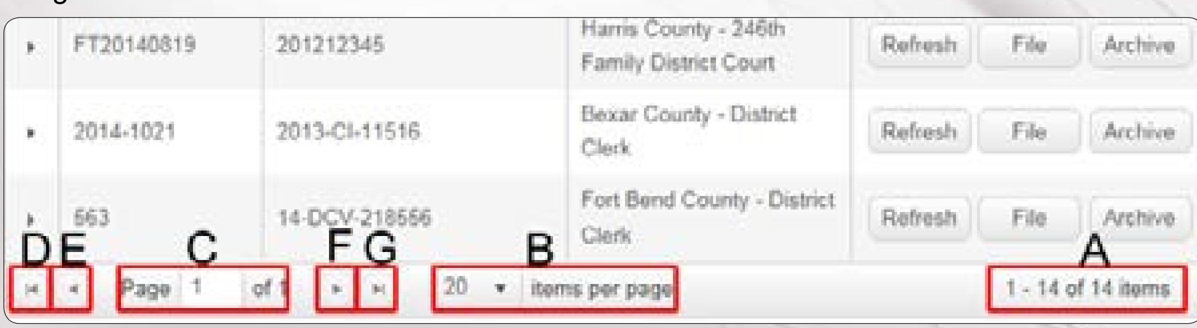


Figure 9-6, The Grid Navigator

- **Total Records** (Figure 9-6, 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 9-6, B) - You have multiple selections concerning how many rows you want FileTime to display.
- **Page Displayed** (Figure 9-6, 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 9-6, D) - Click this button and you are returned to the page containing the first record.
- **Go Back One Page** (Figure 9-6, E) - Click this button to go back one page.
- **Go Forward One Page** (Figure 9-6, F) - Click this button to go forward one page.
- **Go to End** (Figure 9-6, G) - Click this button to go to the last page.

X. eFile Notification Emails

A. Registration Emails

A person must be registered in the eFileCA system in order to use it. This includes accessing the Administrator features for a firm account.

To complete the registration process, the newly registered person must activate his/her account. One of two emails will be sent to the new registrant for this purpose.

1. Activation Email - Administrator Registered

An administrator registering a new firm user is not able to create a password and security question for that person. Therefore, the new user must click the **Activate Account** link and login with the temporary password contained in this Account Activation email.

SUBJECT: eFileTexas.gov - New User Activation

Your firm administrator has added an eFileTexas.gov account for you to use for e-filing in Texas. Please click on the link below to activate your account.

Activate Account

After activating your account, please use the following system generated password.

Password: $$$newpassword

Your password is made up of numbers, letters, and characters. In order to make sure you are entering the password accurately, it is easiest to copy and paste the password into the EFSP system.

Do not reply to this email. This message was automatically generated by eFileTexas.gov.

2. Activation Email - User Registered

When a firm allows users to self-register, and a user does so, he/she is able to create a password and security question during the registration process. The activation email, therefore, does not contain a temporary password.

SUBJECT: eFileTexas.gov - New User Activation

You have been registered with eFileTexas.gov, the Texas E-Filing System. Please click on the link below to activate your account.

Activate Account

Do not reply to this email. This message was automatically generated by eFileTexas.gov.

If you need technical assistance, please contact your eFiling Service Provider.

B. eFileCA eFiling Notifications

The following notification emails are delivered directly from eFileCA 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:	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
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.eFileCA.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.

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 eFileCA 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**.

4. Failed Filing Notification

You will receive this notification if/when eFileCA 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 eFileCA 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 eFileCA.

C. eFileCA eService Notification eMails

eFileCA also sends four different notification emails regarding eService issues.

1. Notification of Service

eFileCA 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.eFileCA.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

eFileCA 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.eFileCA.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. 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

4. **Filing Failed - eService Returned**

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**

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

Filing Details	
Return Reason	Incomplete Signature Block - TRCP 21(f)(2)/TRCP 57
Return Comment	$$$rejectreason

Document 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

D. FileTime Registration eMail

FileTime sends the following notification email to all your firm's eFiling administrators when:

- Your firm allows users to register themselves and
- A user has done so.

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Dear Thomas:

Gilbert Hernandez has registered with your firm and is waiting for approval from one of your firm eFiling administrators.

To approve Gilbert.

Login to www.filetime.com

Click the ADMIN button,

Click Firm Users,

Find Gilbert Hernandez on the grid, click to highlight, then click Approve in the User Information area.

If you are out of the office you can do the same from any Android mobile device.

E. FileTime eFiling Notification eMails

FileTime sends the following eFiling Notification eMails:

1. Proof of Submission

Proof of Submission

Submission ID: 84862

Case Information

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

Client ID: 0096756
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		
	Document	Type	Security
No Fee Documents	Civil Case Info McAda Divorce 09-09-2014.pdf	Lead Document	Public Document
	Document	Type	Security
No Fee Documents	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 eFileCA before the filing was submitted to the clerk of court.

Therefore, the original filing date is not preserved.

eFileCA 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.

F. 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.

G. 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.

Chapter 11

XI. 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 **Case Overviews** page as an example (Figure 11-1) click on the row for the case you want to archive, causing it to be highlighted.

Figure 11-1, Archive a Case

Click the **Archive** button (Figure 11-1, 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, filings**, and **eServices** on their respective pages.

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

A. Access an Archived Case

Again using the **Case Overviews** as an example, click the **Cases** drop down menu (Figure 11-2, A).

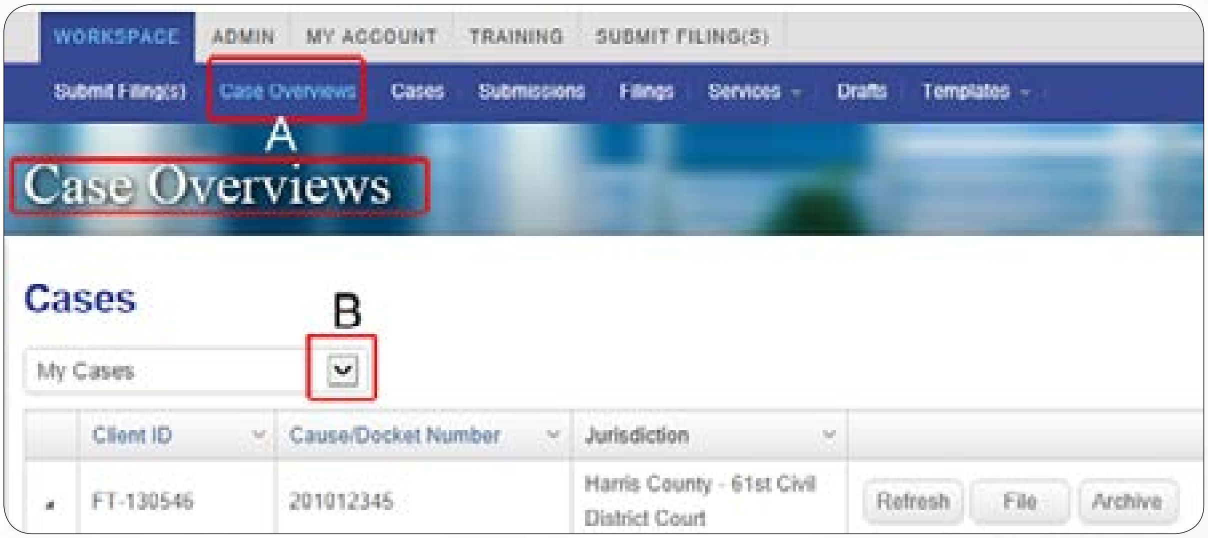

Figure 11-2, Cases Selector

The drop-down selector opens - click **Archived Cases** (Figure 11-3, A).

Figure 11-3, Select Archived Cases

The **Archived Cases** page displays (Figure 11-4).

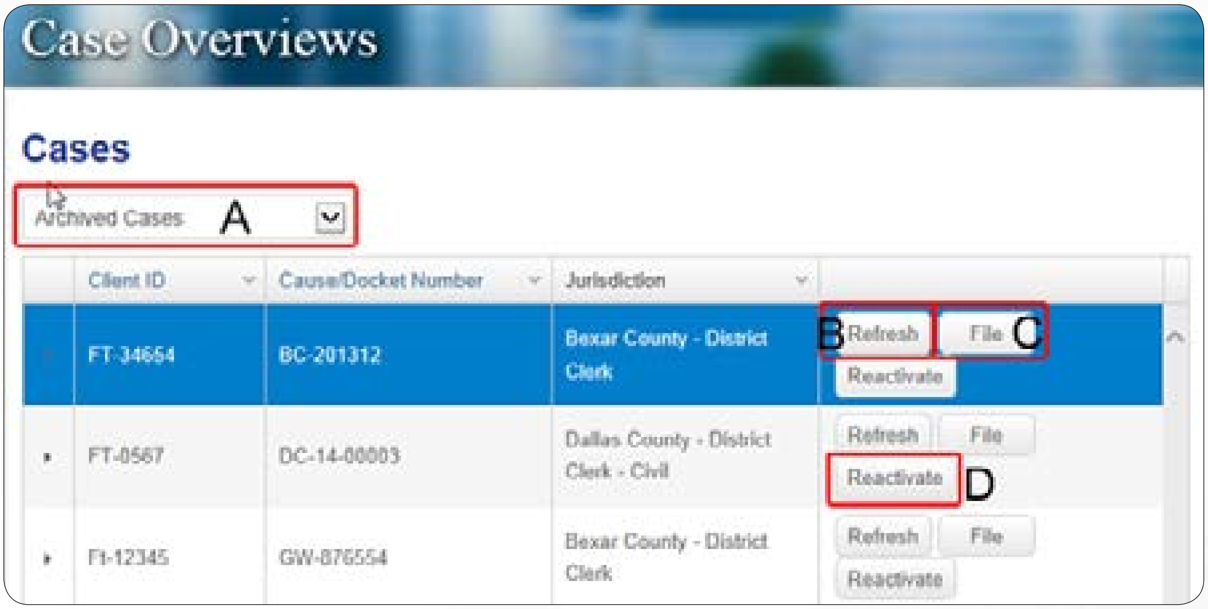

Figure 11-4, Archived Cases

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 11-4, B) to download the most current information about the case from eFileCA.

Click the **File** button (Figure 11-4, C) to initiation a submission for the archived case.

A. Reactivate an Archived Case

Click the **Reactivate** button (Figure 11-4, D) to move the case from the archive to your firm's list of active cases.

Chapter 12

XII. 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.
- **eFiling Guide** - A detailed look at the FileTime eFiling process.
- **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.