My Account Guide

This guide provides you information about the My Account feature in FileTime.

This feature enables you to:

- Reset your eFiling password,
- Update your name and/or email address,
- Manage notification email, and
- Much more.

Revised 12/17/2015

Table of Contents

Chapter 1

I. The My Account Feature Overview

The **My Account** feature in FileTime enables you to manage your personal eFileCA account.

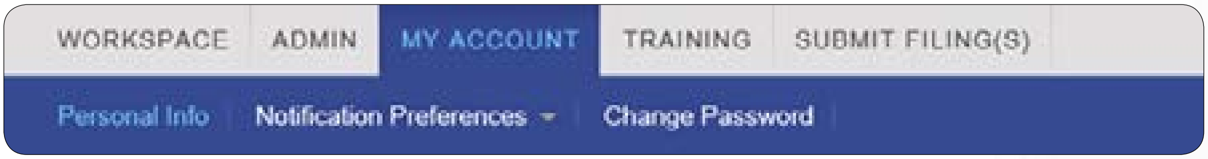

Figure 1-01, The My Account Feature

The major sections of the My Account feature are:

A. Personal Info

In this section you:

- May be able to update your name and email address if you are a firm eFiling administrator
- Can optin to the eFileCA Public Service Contact List so that counsel can add you as a service contact on cases, and
- Can opt in and out of having the Welcome page open when you login to FileTime. The Welcome page provides shortcuts to many of the major functions and features in FileTime.

B. Notification Preferences

Under this section you will be able to:

- **Manage eService Notifications -** You can designate an unlimited number of persons to receive additional copies of any Notification of eService emails sent to you by eFileCA.
- **Manage Administrative Copies of notification emails -** In the next section you will learn how to opt out of receiving any or all of the notification emails sent by eFileCA and FileTime to you. After doing so you may still want someone in your firm to receive copies of those emails. In this section you can designate one or more recipients to whom those emails should be delivered.
- **Manage Your Notification Preferences** - eFileCA and FileTime both will send you many emails to update you on the status of eFilings and eServices. This section enables you to opt out of any or all of those emails.

C. Change Password

In this section you will be able to change your personal password in the eFileCA system and set or change your security question.

Your will see more details about the above features in the following sections.

Chapter 2

II. Personal Info

The personal info page is a bit unusual in the sense that how useful it is depends on whether your role in the system includes Administrator.

A. Update Your Name and/or Email Address

If you are an administrator you are able to update your name (Figure 2-01, A) and your email address (Figure 2-01, E) on this page.

If your role does not include Administrator, those fields cannot be changed by you. A firm administrator can update your name and/or your email address in the Firm Admin feature.

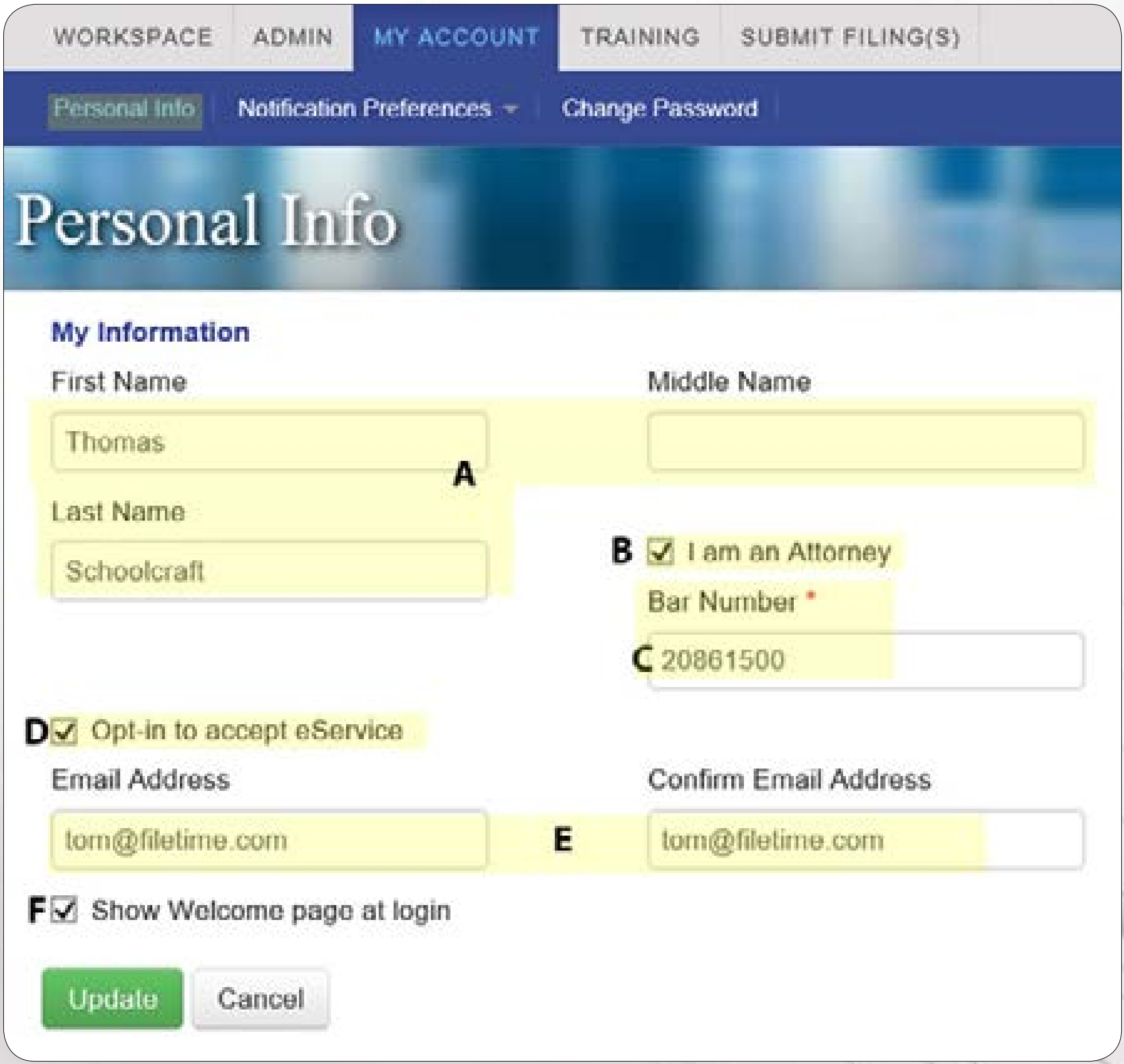

Figure 2-01, Personal Info

If you are an attorney, be sure the **I am an Attorney** feature is checked (Figure 2-01, B). When you check it you will also so a field open in which to enter your State Bar of Texas Bar Card Number (Figure 2-01, C).

If you are an out-of-state attorney your bar number will not be recognized and you should not mark click the **I am an Attorney** option.

B. Opt-in to accept eService

All attorneys should check this option. Non-attorneys probably should not check it but nothing prevents you from doing so.

Checking this option places your information on the eFileCA Public Service Contact List. This enables counsel to add you as a service contact in cases for which you have not proactively added yourself as a service contact.

Adding yourself to this list also helps you comply with the Rules or Civil and Appellate Rules of Procedure requiring eService in all jurisdictions where eFiling is mandatory.

C. Show Welcome Page at Login

The FileTime Welcome page contains shortcuts to many of the more popular and useful features in FileTime.

When this option is checked you will see the Welcome page when you login.

Unchecking this option suppresses that page.

Chapter 3

III. Notification Preferences

In the eFileCA system you will receive numerous emails that update you on the status of eFilings and eServices.

In this section you will learn now to manage all of those emails.

Before we begin, however, it is important to understand the difference between the Notification of Service email sent by eFileCA and all the other emails:

- **Notification of Service eMails** - These come directly from eFileCA and provide you information about and a link with which to download the service document when you are electronically served by counsel. **You cannot opt out of receiving these emails**.
- **All other eFileCA and FileTime emails -** You can opt out of receiving any or all of any other system emails.

When you are in the **My Account** section and you click the drop-down arrow for the **Notification Preferences** (Figure 3-01, A) option you will a menu with three options (Figure 3-01, B, C, D).

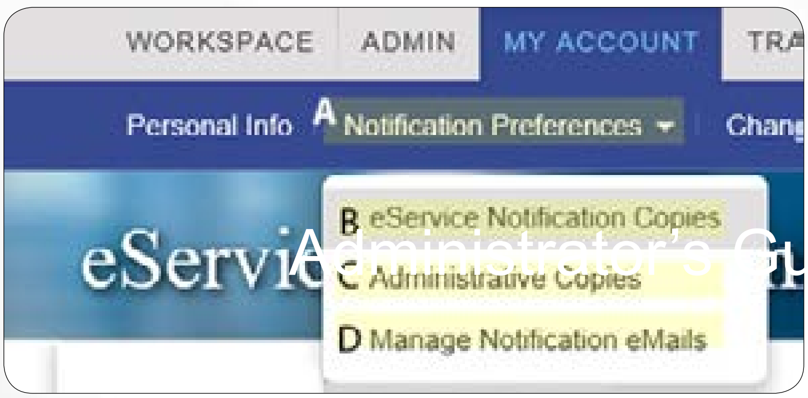

Figure 3-01, Notification Preferences

A. eService Notification Copies

Click the **eService Notification Copies** button (Figure 3-01, B) and you are taken to the eService Notification Copies page (Figure 3-02).

When you are a service contact for your firm in a case, the eFileCA system will deliver to a **Notification of Service** email to you each time you are eServed by counsel for the case.

The eFileCA system has a provision enabling you to designate that they send a copy of the Notification of Service email to one additional email address.

The FileTime eService Notification Copies feature enables you to designate an unlimited number of additional people to receive copies of the eService notification of emails. These additional copies come from FileTime, not from eFileCA.

Figure 3-02, eService Notification Copies

Any additional recipients you have already added are displayed on this page (Figure 3-02, A).

You can edit the name or email address of a recipient by clicking the **Edit** button (Figure 3-02, B).

You can remove the recipient by clicking the **Delete** button (Figure 3-02, C).

Click the **Add eService Notification** button (Figure 3-02, D) to add an additional recipient.

Clicking the **Add eService Notification** button (Figure 3-02, D) causes the **Attach Firm Users to this eService Notification** window (Figure 3-03) to open.

All your firm's service contacts are displayed (Figure 3-03, A). By default, FileTime displays all your firms registered service contacts (Figure 3-02, C).

Check the box next to a name (Figure 3-03, B) to add that name to your list.

If the service contact you want to add is not displayed (Figure 3-02, A), you can add that person as a new service contact for your firm.

Click the **Add eService Notification** option (Figure 3-02, D).

FileTime will then guide you through the process of adding the new firm service contact which you will then be able to assign to receive a copy of your eService notifications.

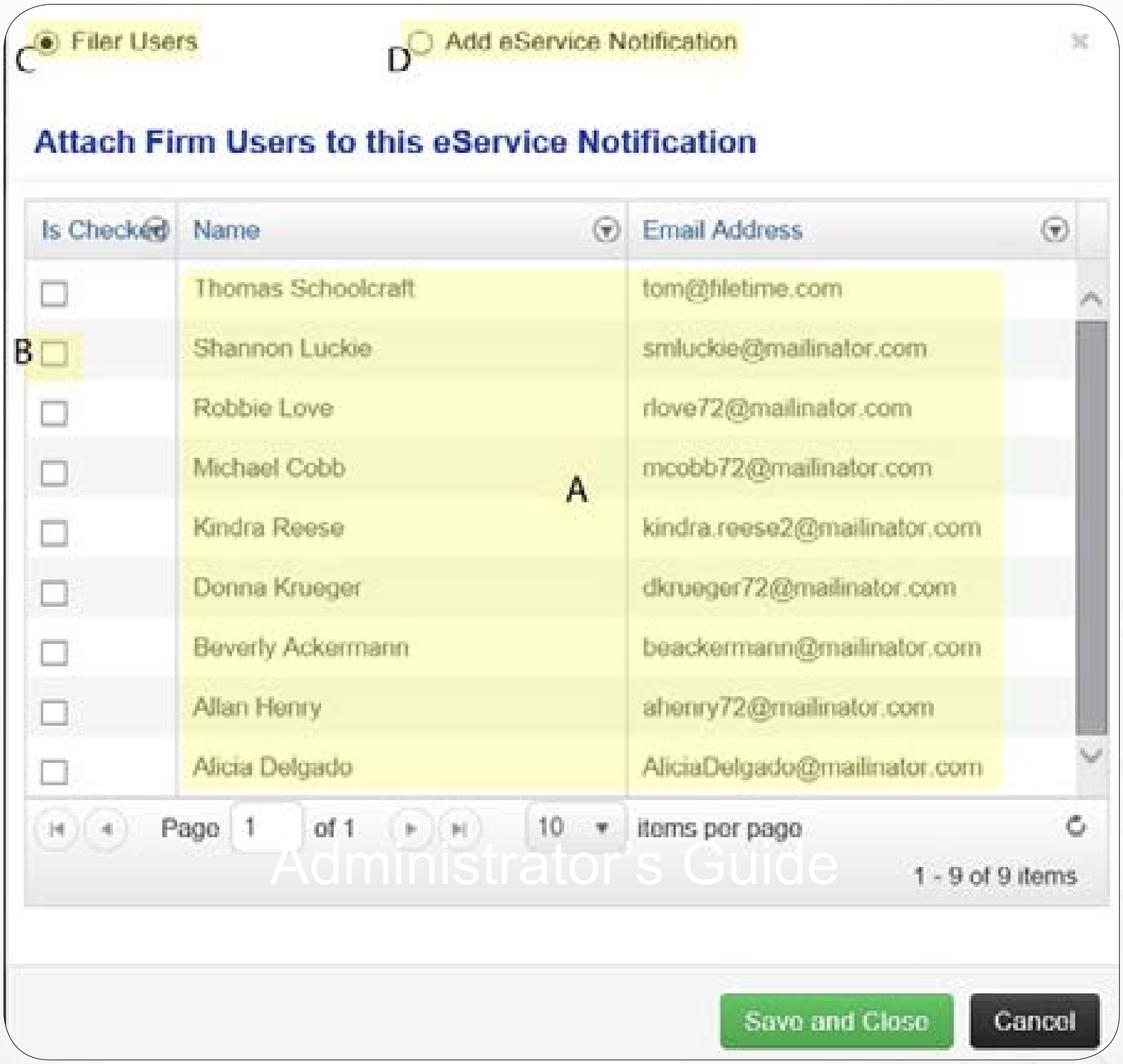

Figure 3-03, Select Firm Service Contacts

B. Administrative Copies

This feature enables you to designate that all eFileCA notification emails (except the Notification of Service email) go also to any persons' email addresses that you designate on this page (Figure 3-02, A).

Even if you completely opt out of receiving them in the next section (**Manage Notification eMails**), anyone listed on this page will be sent copies of those emails.

Click the respective **Edit** or **Delete** button to make the required changes for a recipient.

Click the **Add New Recipient** button (Figure 3-04, B) to add a new recipient,

Figure 3-04, Administrative Copies

When you click the Add New Recipient button (Figure 3-04, B) you are presented a field (Figure 4-5, A) in which you can add the email address of the new recipient.

Click the **Save** button (Figure 3-05, B) to save the entry or the **Cancel** button (Figure 3-05, C) if you change your mind.

Figure 3-05, Add New Administrator

C. Manage Notification eMails

Particularly if you are an attorney, you may want to reduce the number of emails in your Inbox. The page enables you to nearly eliminate all the notification emails you receive from eFileCA and from FileTime, if that is your desire.

Figure 3-06, Manage Notification Emails

There are three different categories of notification emails possible on this page.

1. **Firm Admin Reports from FileTime**

   This section is only visible for firm eFiling administrators. Filers without this role do not see this section.

   FileTime proactively sends reports to firm eFiling administrators daily when these options are checked.

   a. **Firm Submissions Waiting on Clerk Review**

      When this option is checked, FileTime proactively sends this daily email report to the administrator. It provides a firm-wide report of submissions that have not been reviewed by the clerk of court in more than two business days.

   b. **Firm Submissions Returned by the Clerk for Correction**

      When this option is checked, FileTime proactively sends this daily email report to the administrator. It provides a firm-wide report of submissions that were returned for correction.

2. **eFileCA Notifications**

These notifications are send by eFileCA:

a. **Filing Accepted**

When this option is checked you will receive notification emails from eFileCA when the clerk of court has accepted your eFilings.

b. **Filing Submitted**

When this option is checked you will receive notification emails from eFileCA notifying you that you have successfully submitted an eFiling into the system.

c. **Filing Submission Failed**

When this option is checked you will receive emails from eFileCA notifying you that they failed to accept a submitted eFiling.

d. **Filing Returned for Correction**

When this option is checked you will receive emails from eFileCA notifying you that the clerk of court returned an eFiling for correction.

e. **Service Undeliverable**

When this option is checked you will receive notification emails from eFileCA when an eService could not be delivered to the intended recipient.

3. **FileTime Notifications**

These notification emails are sent by FileTime. Many users prefer the FileTime notifications over the corresponding eFileCA notification email because our emails contain more useful information.

a. **Filing Submitted**

When this option is checked you will receive notification emails from FileTime notifying you that you have successfully submitted an eFiling into the system.

b. **Service Status**

When this option is checked you will receive notification emails from FileTime updating you on the status of the eService to all recipients listed in the submission.

c. **Filing Submission Failed**

When this option is checked you will receive emails from FileTime notifying you that eFileCA failed to accept a submitted eFiling.

d. **Filing Accepted**

When this option is checked you will receive notification emails from FileTime when the clerk of court has accepted your eFilings.

e. **Filing Returned for Correction**

When this option is checked you will receive emails from FileTime notifying you that the clerk of court returned an eFiling for correction.

Chapter 4

IV. Change Password and Reset Security Question

You can change your password and/or Security Question at any time using this feature.

To change your password:

- Enter your current password (Figure 4-01, A).
- Enter your proposed new password (Figure 4-01, B) and re-enter it a second time. Remember that it is case sensitive and must contain: (a) 8 -12 characters, (b) at least one number, (c) at least one letter, and (d) either a capital letter or a special character such as #.
- Your security question will be displayed if you have previously set one. If you have not previously set one you must choose one now (Figure 4-01, C).
- Answer your security question (Figure 4-01, D).

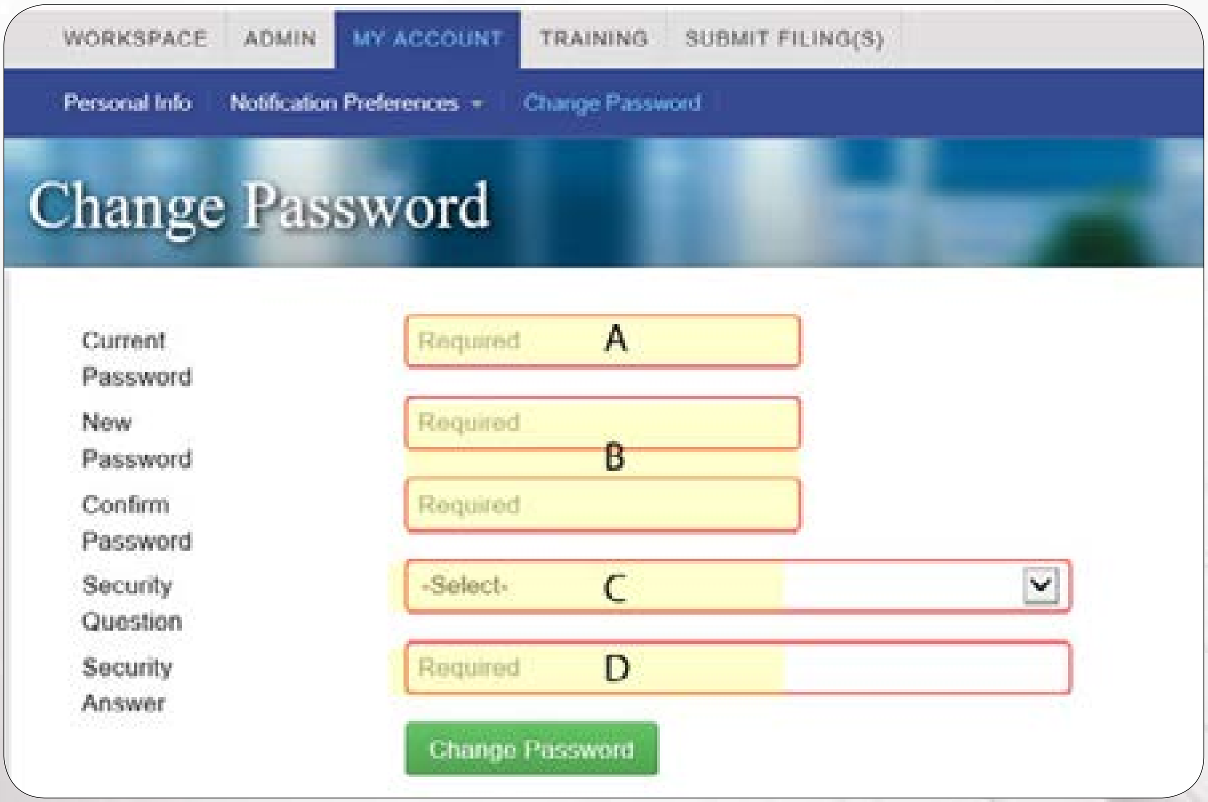

Figure 4-01, Change Password and Reset Security Question

Chapter 5

V. Useful Features in FileTime - Case Tabs

The case tabs provide you valuable information about your cases and are just a few mouse clicks away.

A. Accessing The Case Tabs

When you login to FileTime you arrive at the **Case Overviews** page (Figure 5-01, A) by default.

Find the case you want to research and click the **+** in the far left corner. It then changes to a **–** (Figure 5-01, B) and the case tabs open below the case listing (Figure 5-01, C).

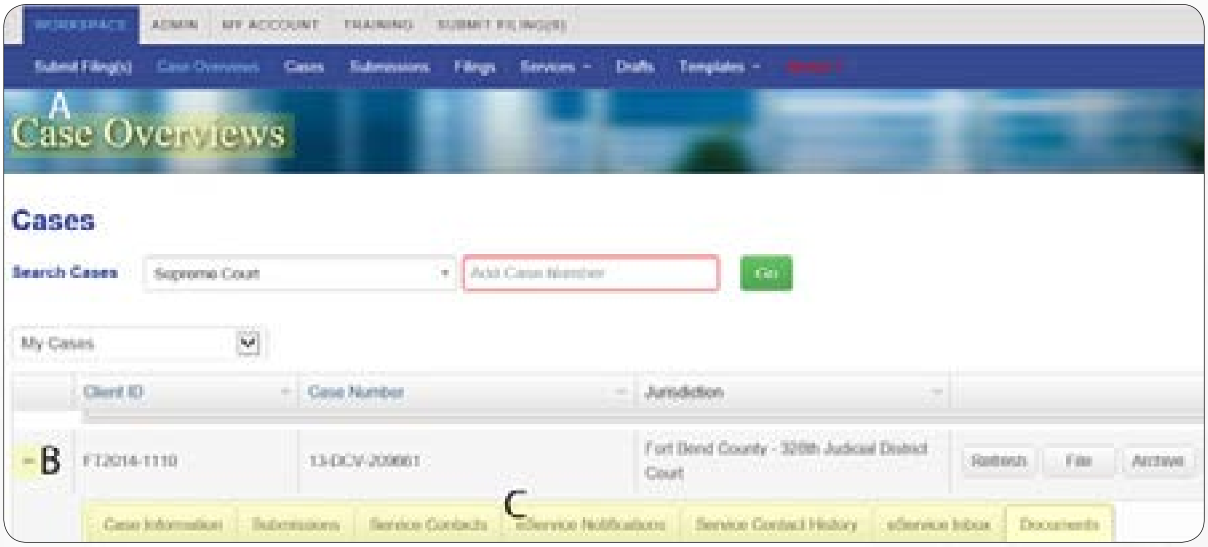

Figure 5-01, Case Tabs

We provide below a brief desciption of the value of some of the more important if these tabs.

B. The Submissions Tab

When you click the **Submissions** tab (Figure 5-02, A) you are presented a view of all the submissions your firm has made for the case.

Figure 5-02, The Submissions Tab

Click the **View** button (Figure 5-02, B) to view the submission and print the file marked documents if desired.

Click the Print Case Billing report button (Figure 5-02, C) to print a report of all submission fees to date for the case.

C. The eService Notifications Tab

In Chapter 3, Section A we showed you how to create a default list of staff to receive copies of eService notifications when you are eServed.

On this tab you can create a customized distribution list specific for this case. Adding any names on this list over-rides your default list so that only names on this list will receive copies of eService notification emails.

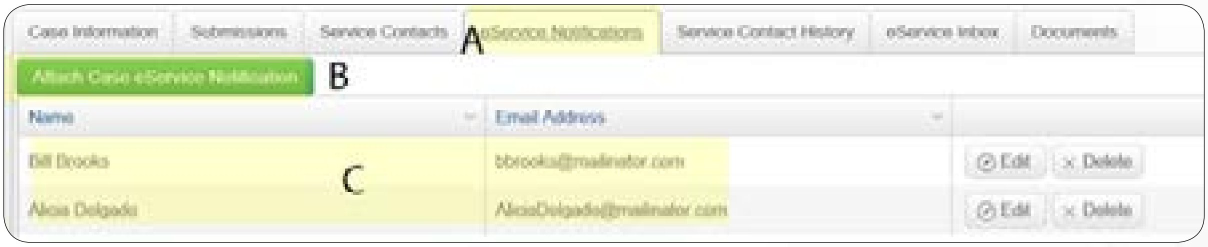

Figure 5-03, The eService Notifications Tab

After clicking on the **eService Notifications** tab (Figure 5-03, A) you can see any individuals you have already added to this list (Figure 5-03, C).

You can edit or delete any name by clicking the appropriate button for that person.

Click the **Attach Case eService Notification** button to add someone to the list.

D. The eService Inbox Tab

Click the eService Inbox tab (Figure 5-04, A) to access the **eService Inbox**.

Figure 5-04, The eService Inbox Tab

The Inbox displays all eServices to your firm for this case (Figure 5-04, B) when the eService information has been provided to FileTime by eFileCA. eFileCA only provides eService information after a filer has submitted at least one eFing through FileTime. Therefore, if you are new to FileTime, this feature will not contain eServices to your firm for this case prior to your first submission through FileTime.

FileTime keeps the service documents for an extended period of time; much longer than the 7 days for which they are available through eFileCA.

Additionally, we save the fiel marked document, not the initial non-file marked copy as submitted.

Click the **View** button (Figure 5-04, C) to view the eService information and to print the service document.

E. The Documents Tab

Access the Documents section by clicking the **Documents** tab (Figure 5-05, A).

The Documents section displays all documents eFiled or eServed by any counsel who eFiled then through FileTime (Figure 5-05, B). Therefore, this section will display for you documents submitted by counsel if that counsel also eFiles through FileTime.

Figure 5-05, The Documents Tab

Click the **Print** button to view and print the file marked document (Figure 5-05, C),

Chapter 6

VI. Getting Assistance and Giving Feedback

We provide a number of training options for you.

A. Video Training

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

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

B. Manuals

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

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

C. 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.

D. 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

E. 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.