Table of Contents

Chapter 1

I. The eService Process

A. How eService Works

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

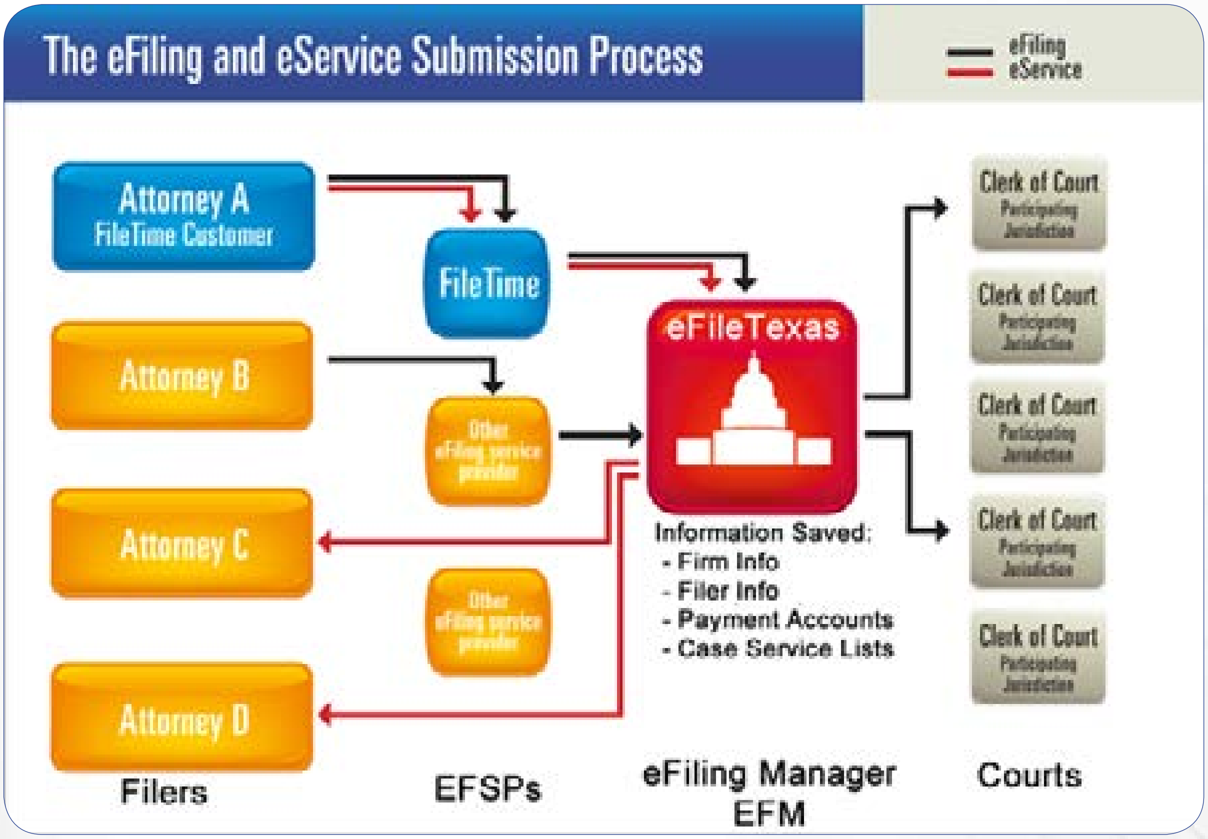


Figure 1-1, The Design and Flow of the eFileCA System

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.

1. 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.

2. **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.

B. TRCP and TRAP Mandate eService

The Texas Supreme Court amended the rules of civil and appellate procedure, effective January 1, 2014. For the first time the rules of procedure addressed eFiling and eService.

Here are the pertinent rules regarding eService:

RULE 21a. METHODS OF SERVICE

(a) Methods of Service. Every notice required by these rules, and every pleading, plea, motion, or other form of request required to be served under Rule 21, other than the citation to be served upon the filing of a cause of action and except as otherwise expressly provided in these rules, may be served by delivering a copy to the party to be served, or the party's duly authorized agent or attorney of record in the manner specified below:

(1) Documents Filed Electronically. A document filed electronically under Rule 21 must be served electronically through the electronic filing manager if the email address of the party or attorney to be served is on file with the electronic filing manager. If the email address of the party or attorney to be served is not on file with the electronic filing manager, the document may be served on that party or attorney under subparagraph (2).

(2) Documents Not Filed Electronically. A document not filed electronically may be served in person, by mail, by commercial delivery service, by fax, by email, or by such other manner as the court in its discretion may direct.

(b) When Complete.

(1) Service by mail or commercial delivery service shall be complete upon deposit of the document, postpaid and properly addressed, in the mail or with a commercial delivery service.

(3) Electronic service is complete on transmission of the document to the serving party's electronic filing service provider. The electronic filing manager will send confirmation of service to the serving party.

C. Time and Date of Service

eService is deemed to have been delivered at the time of submission. See the rules below.

RULE 21a. METHODS OF SERVICE

(b) When Complete.

(3) Electronic service is complete on transmission of the document to the serving party's electronic filing service provider. The electronic filing manager will send confirmation of service to the serving party.

Chapter 2

II. Two Types of eService

There are two ways to submit eService; with or without a concurrent court filing.

A. Service with a Court Filing

When going through the submission process, leave the **Filing Type** default selections of **eFile** and **eServe** as shown on Figure 2-1.

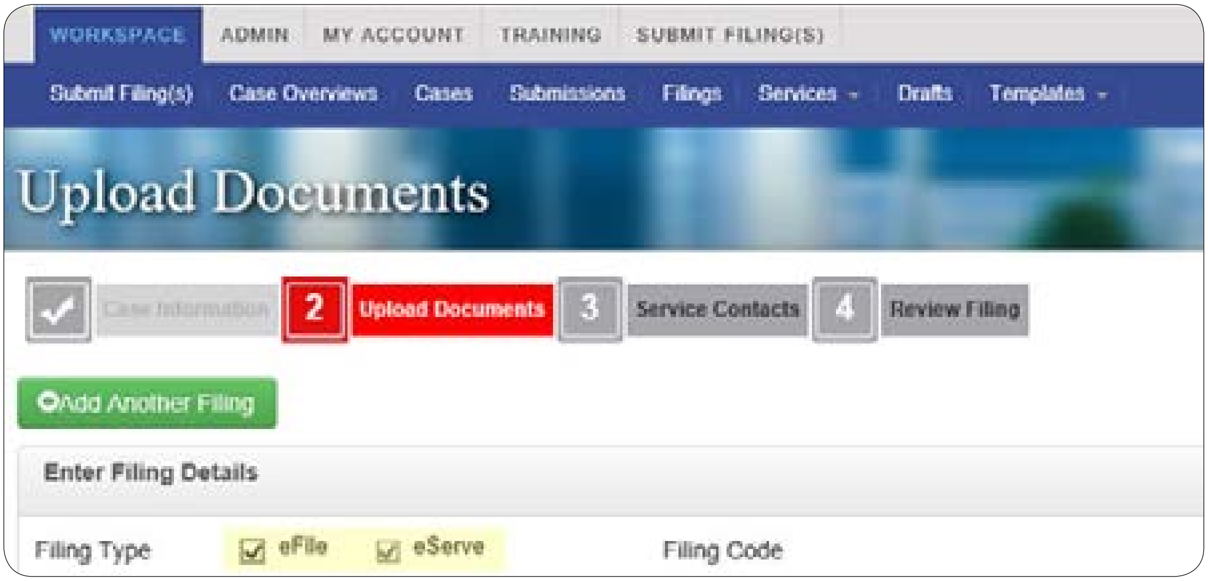


Figure 2-1, Choose Service with a Court Filing

B. Service of Discovery

During the submission process, for the **Filing Type** selection de-select eFile and leave only **eServe** checked, as shown in Figure 2-2.

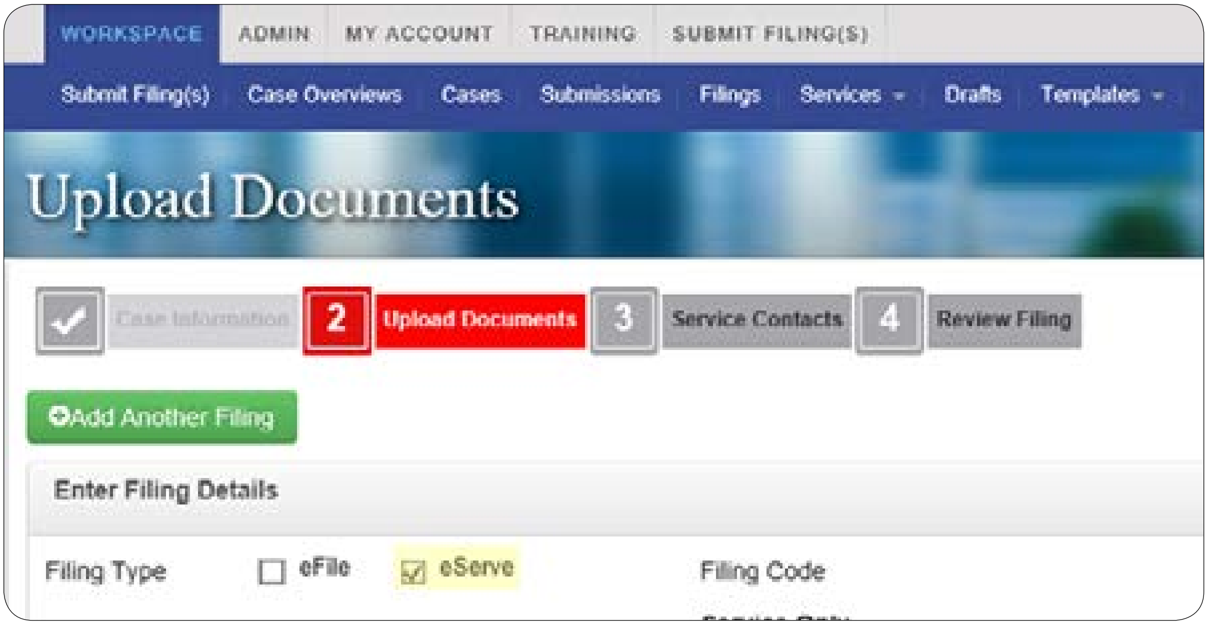


Figure 2-2, Service Without a Concurrent Court Filing

While the eServe only option is most commonly used for service of discovery documents, it can be used to eServe any other documents as well.

Chapter 3

III. Optin and Out of eService

You cannot be eServed unless you, or someone on your behalf, opts you in as a service contact for the case.

A. Five Ways to Opt You In for eService

1. By Your Firm eFiling Administrator

Your firm eFiling administrator can opt you into the eFileCA Public Service Contact list. This action does not directly add you as a service contact for any specific case. It does allow other counsel to select you from the Public Service Contact List and add you as a service contact for a case in the event you, or your staff, have not already done so.

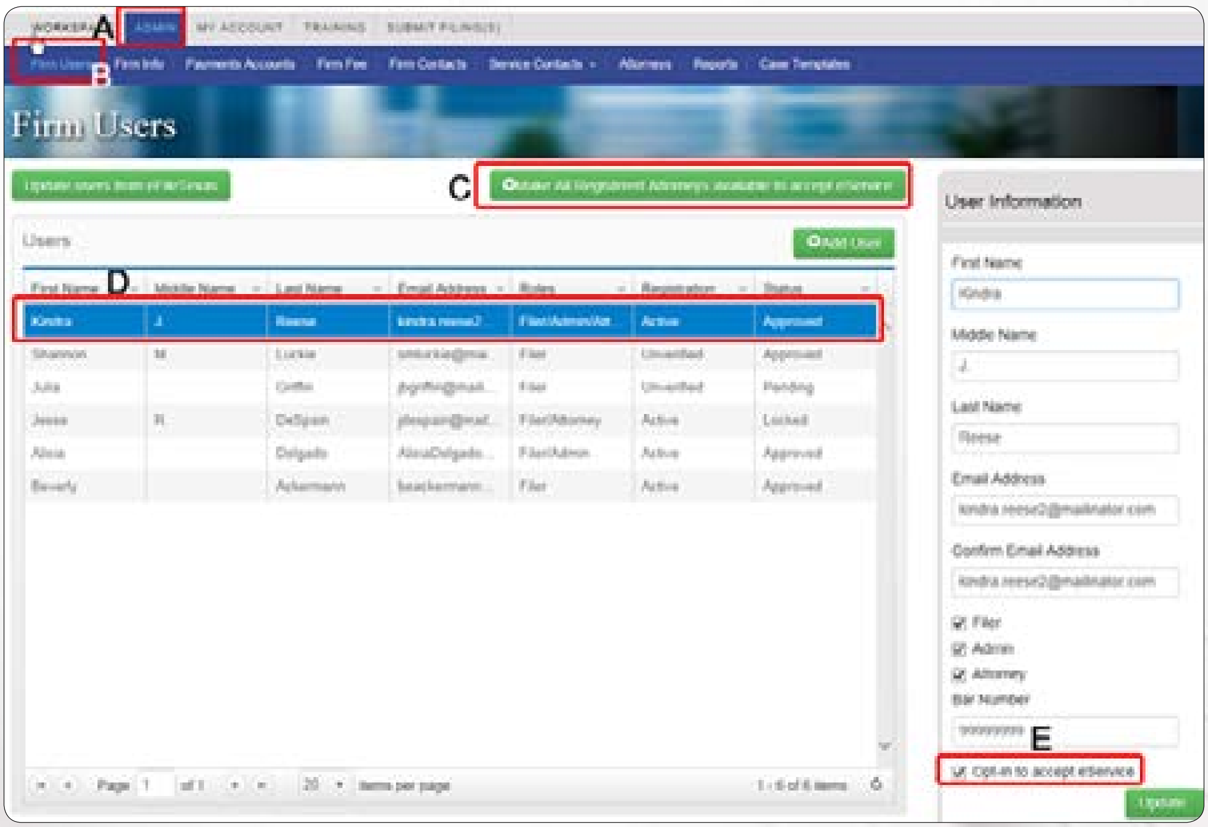


Figure 3-1, Opted In to the Public Service Contact List

The firm eFiling administrator logs in at www.filetime.com, clicks the **Admin** button (Figure 3-1, A), and then clicks the **Firm Users** button (Figure 3-1, B).

The Admin can click the **Make All Registered Attorneys available to accept eService** button (Figure 3-1, C), which would automatically add all your firm's attorneys to the Public Service Contact List.

The Admin can also locate your name (Figure 3-1, D) and click in the row to highlight it. Then, click the **Opt-in to accept eService** button (Figure 3-1, E).

Either method adds you to the eFileCA Public Service Contact list.

2. Add Yourself to the Public Service Contact List

This action does not directly add you as a service contact for any specific case. It does allow other counsel to select you from the Public Service Contact List and add you as a service contact for a case in the event you, or your staff, have not already done so.

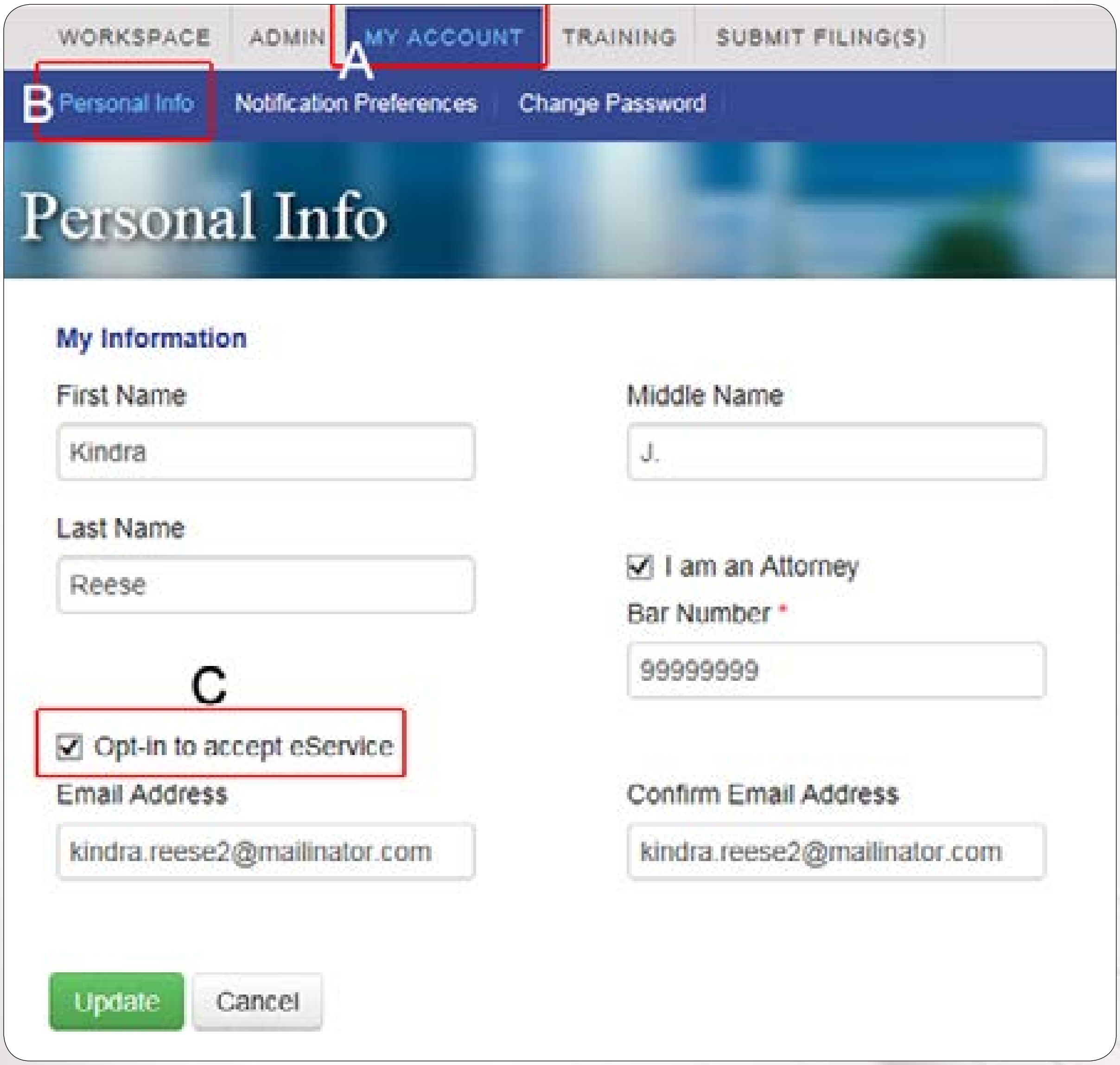


Figure 3-2, Opt Yourself Into the Public Service Contact List

After logging into www.FileTime.com, click the **My Account** button (Figure 3-2, A).

By default you will be taken to the **Personal Information** page.

Click the **Opt-in to accept eService** button (Figure 3-2, C) and click the **Update** button.

You will be added to the eFileCA Public Service Contact List.

3. By Your Firm Filer During a Submission

This is the most common method of directly adding an attorney, or any other firm member to the service contact list for a case.

The third steps of the submission process is the **Service Contacts** page (Figure 3-3).

The filer clicks the **Add Service Contacts** button (Figure 3-3, A) to add as many firm service contacts to the case as are desired.

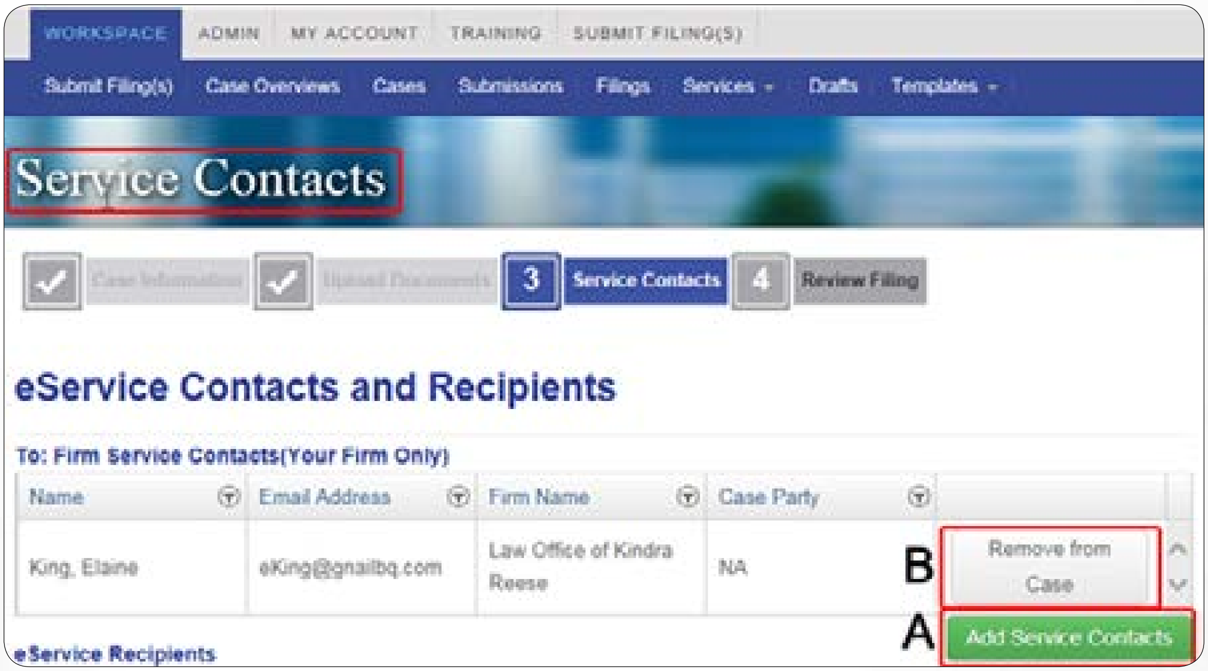


Figure 3-3, Added as a Service Contact During a Submission

4. **By Your Firm Outside of a Submission**

   Any firm member can look up a specific case and add a firm service contact to that case.

   Go to the Case Overviews or the Cases page, either one works. In this example we are on the **Case Overviews** page (Figure 3-4).

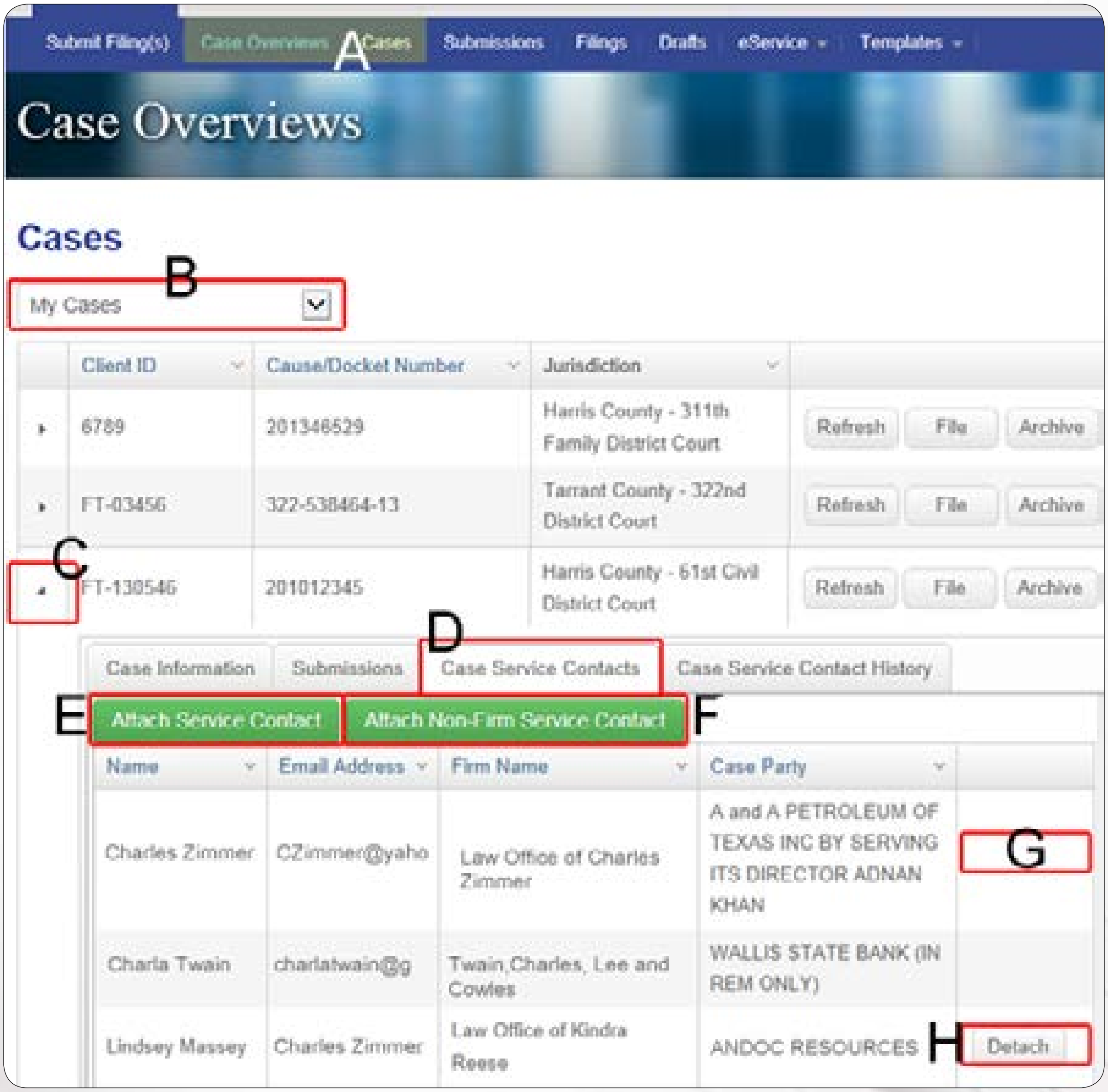


Figure 3-4, Service Contact Added Outside a Submission

   Find the case and click the arrow (Figure 3-4, C) for that row.

   The case tabs open - click on the **Case Service Contacts** tab (Figure 3-4, D) to display all the existing service contacts for the page.

   Add a firm service contact to the case by clicking the **Attach Service Contact** button (Figure 3-4, E).

5. **By Another Firm During a Submission**

   If you:

   - have not opted in as a service contact for the case and

- Opposing counsel knows your email address,

he/she can add you as a service contact for the case.

This is somewhat of a worst case scenario for you because opposing counsel now “owns” your representation in the case. Only opposing counsel can remove you from receiving eService on the case if you are removed from the case, for example.

B. Four Ways to Opt You Out of eService

1. By Firm eFiling Administrator

Your firm administrator can opt you out of the Public Service Contact List by reversing the process explained in A. 1.

The firm eFiling administrator de-selects the **Opt-in to accept eService** button (Figure 3-1, E) and saves the changes.

You are no longer on the eFileCA Public Service Contact List but that does not remove you as a service contact for any cases. It simply prevents counsel from using the Public Service Contact list to add you as a service contact for a case.

2. Remove Yourself from the Public Service Contact List

Reverse the steps in **A. 2.**

Login at www.filetime.com and click **My Account** (Figure 3-2, A) and then **Personal Information** (Figure 3-2, B).

De-select the **Opt-in to accept eService** button (Figure 3-2, C) and click the **Update** button.

You will be removed from the eFileCA Public Service Contact List but that does not remove you as a service contact for any cases. It simply prevents counsel from using the Public Service Contact list to add you as a service contact for a case.

3. Remove You as a Service Contact During a Submission

On the **Service Contacts** page (Figure 3-3) during a submission, click the **Delete from Case** button (**F**igure 3-3, B).

4. Remove You as a Service Contact Outside of a Submission

Reverse the steps in **A. 4.**

Go to the Service Contacts tab for the case from which you wish to be removed as a service contact. Find the service contact to be deleted and click the **Detach** button (Figure 3-4, H).

If you find your name on the list of service contacts but there is no **Detach** button (Figure 3-4, G), that means that another counsel has added you as a non-firm service contact. Only that counsel’s firm or eFileCA can remove you as a service contact for the case.

Chapter 4

IV. Adding eService Recipients to a Submission

Counsel to a case will only be eServed when he/she is listed as a service contact for a case.

eFileCA makes no distinction among service contact-types in the system. They consider all counsel associated with a case to be service contacts for the case.

At FileTime we classify case service contacts in three categories:

- **Firm Service Contacts** - These are your firm members that your firm has proactively added to the case as service contacts for the case for the firm. When counsel eServes for the case, your firm service contacts will receive those eServices.
- **eService Recipients** -These are service contacts for the other case party counsel who will be eServed with each submission by your firm. They either opted in as service contacts when their firm filed in the case or they were added from the eFileCA Public Service Contact List by a case filer.
- **Non-Firm Service Contacts** - These service contacts display in the eService Recipients area but they were added differently. They are counsel for case parties but they were added by your firm members. They had to be added as non-firm service contacts because they were not opted in to receive eService for the case and they were not on the Public Service Contact List.

A. Recipient Already Opted In

In Figure 4-1 you see that the firm has added Kindra Reese as the firm service contact for the case.

Kenneth Williams displays as an eService Recipient for the case. He wither opted in while filing for the case or someone added him from the eFileCA Public Service Contact List.

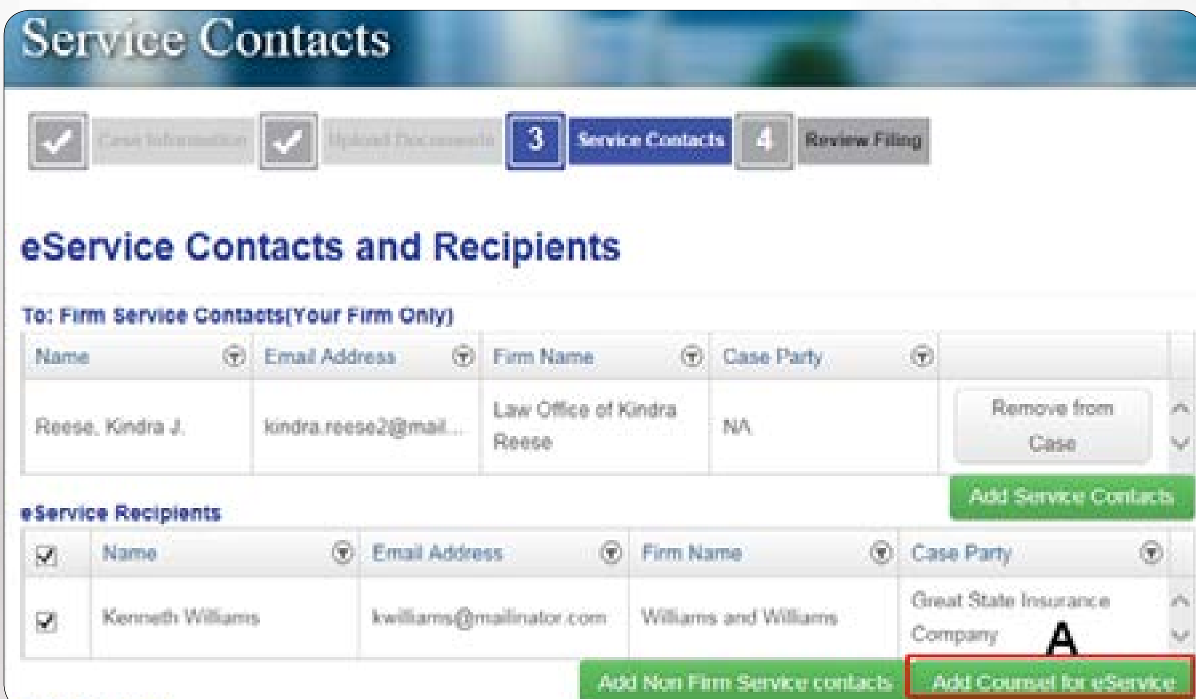


Figure 4-1, One eService Recipient Already Opted In

However, there are three other counsel to the case and we need to add them to the service list.

First, check to see if you can add counsel from the eFileCA Public Service Contact List.

B. Add from eFileCA Public Service Contact List

Click the **Add Counsel for eService** button (Figure 4-1, A) to first search the Public Service Contact List.

The **Attach Opposing Counsel Attorney(s) to this case** window opens (Figure 4-2).

Enter any part of the first name, and/or last name, and/or firm name for counsel and click the **Search** button.

If you find the counsel you are looking for, check the selector (Figure 4-2, D) to add that counsel to your service list.

Select the **Case Party** represented by the counsel (Figure 4-2, E).

Click the **Save and Close** button.

Figure 4-2, Adding Counsel from the Public Service Contact List

Figure 4-3 shows your eService Recipient list with the newly added counsel.

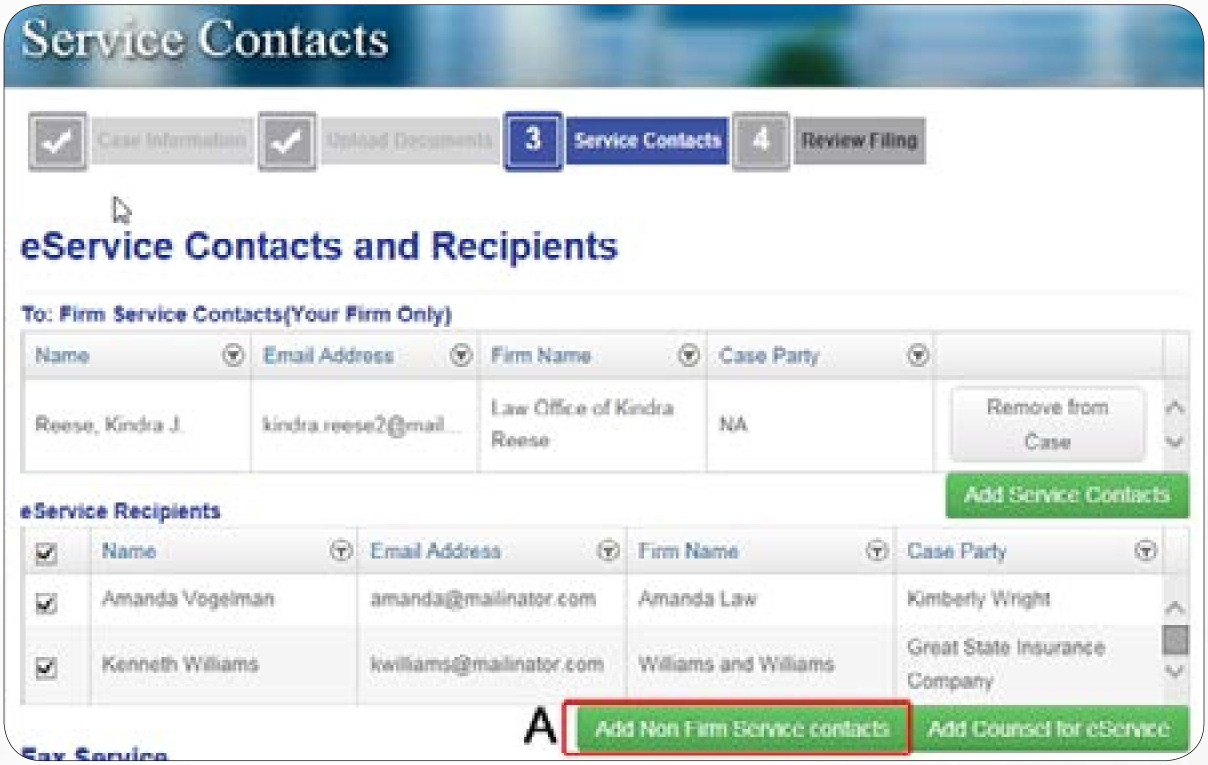


Figure 4-3, Counsel Added

However, the search of the Public Service Contact List failed to find the two remaining counsel to the case, Ann Hunter and Spiro Ashton.

The next step is to see if we can add them as Non-Firm Service Contacts or, as a last resort, add one, or both, as Fax Service recipients.

Click the **Add Non-Firm Service Contacts** button (Figure 4-3, A).

C. Add Non-Firm Service Contact

The **Attach Non-Firm Service contacts to this case** window opens (Figure 4-4).

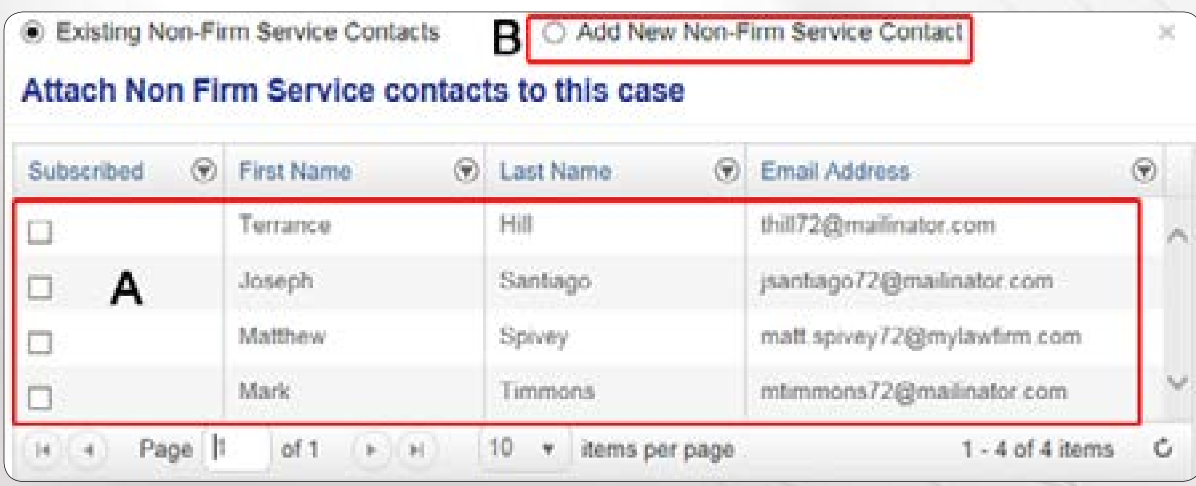


Figure 4-4, Attaching a Non-Firm Service Contact

By default, you are shown all the Non-Firm Service Contacts (Figure 4-4, A) that have been added by your firm members to your firm's list of Non-Firm Service Contacts.

This list is composed of counsel:

- associated with cases in which your firm represents one if the case parties, and
- who did not opt in as a service contact, and
- could not be added to the case an eService Recipient because he/she was not on the eFileCA Public Service Contact List, and
- your firm had the counsel's email address so one of your firm members added him/her as a Non-Firm Service Contact.

However, the attorney you are searching for does not display on the list of your firm's Non-Firm Service Contacts so you have to add this counsel to the list of your Firm's Non-Firm Service Contacts. You can only do so if you have an email address for the counsel.

Click the **Add New Non-Firm Service Contact** option (Figure 4-4, B**)**

On the **Add Non-Firm Service Contact** page (Figure 4-5) add the name and email address of the counsel.

Select the party represented by that counsel.

Click the **Save and Close** button.

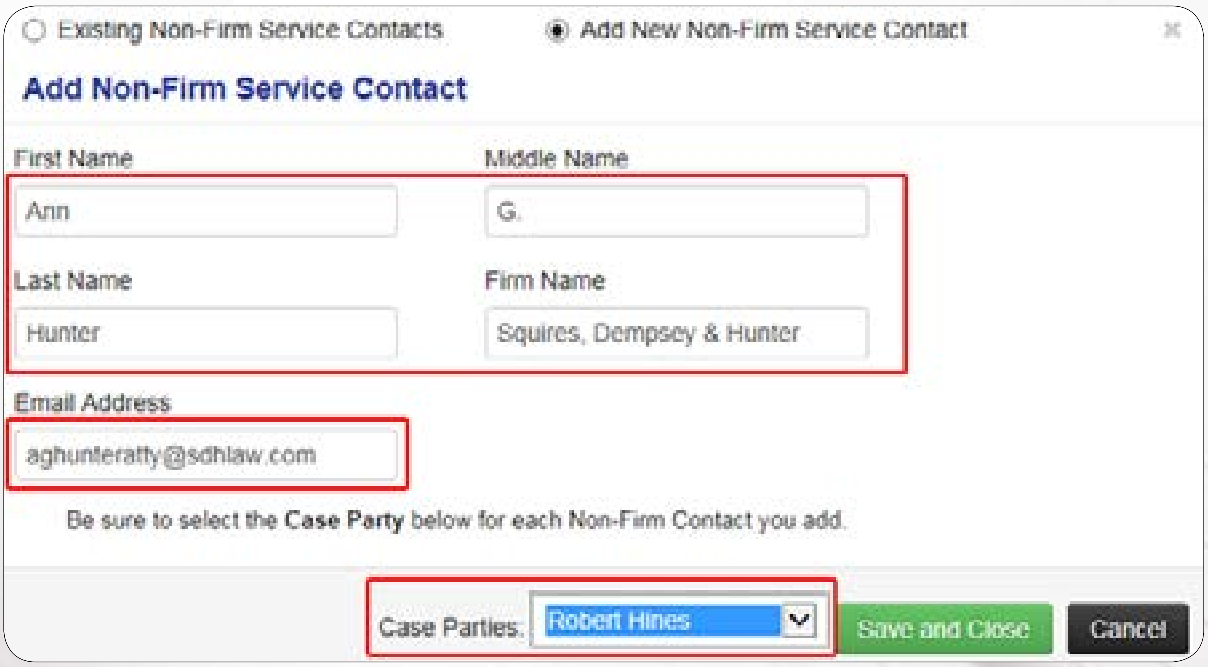


Figure 4-5, Adding New Non-Firm Service Contact

The newly added Non-Firm Service Contact now displays as an eService Recipient for the case (Figure 4-6).

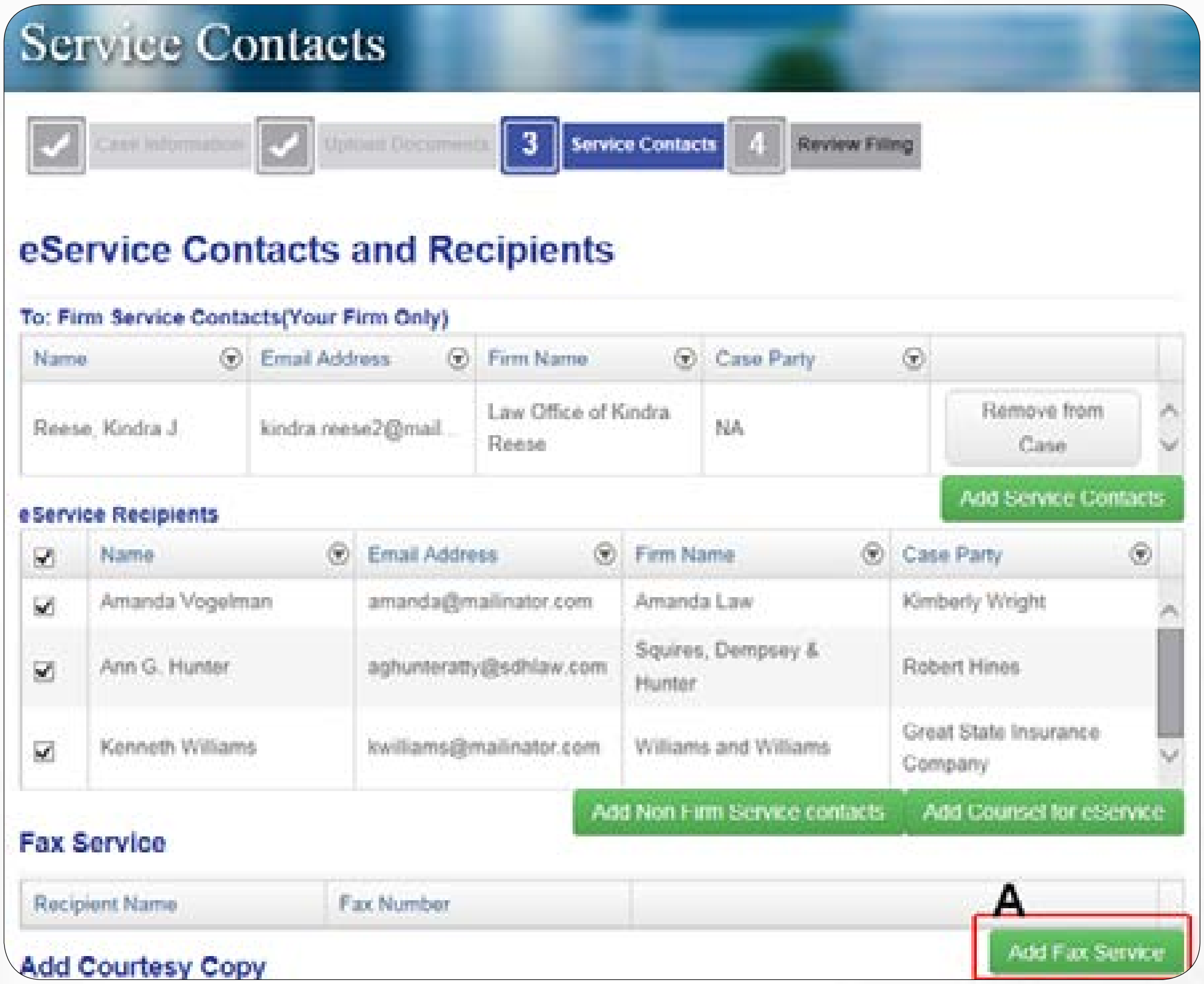


Figure 4-6, New Non-Firm Service Contact

D. Add Fax Service Recipients

Unfortunately, we do not have an email address for the last counsel to the case, Spiro Ashton but we do have a fax number.

Click the **Add Fax Service** button (Figure 4-6, A).

On the **Add Fax Service** page (Figure 4-7), add the name and fax number and save.

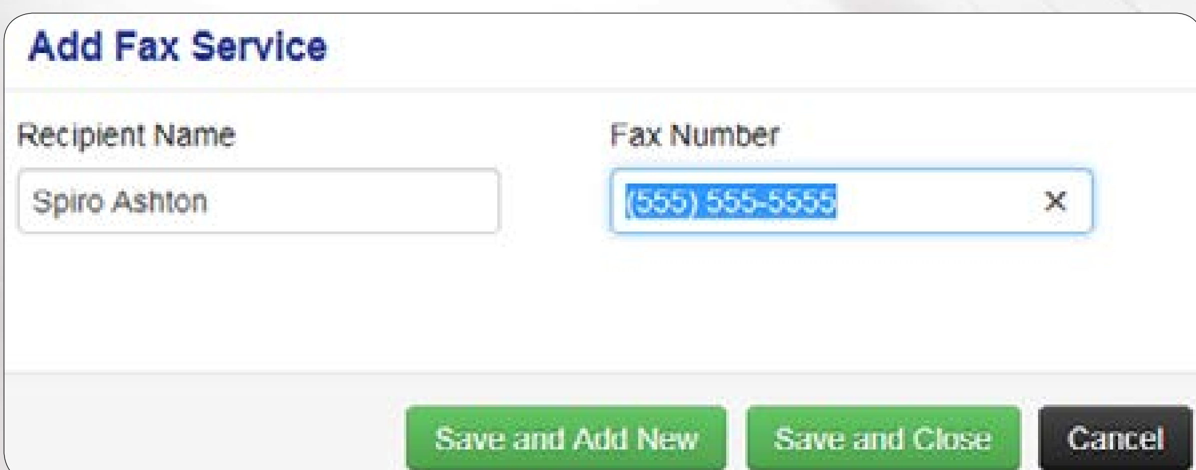


Figure 4-7, Add Fax Service Recipient

Your completed eService Contacts page is complete (Figure 4-8).

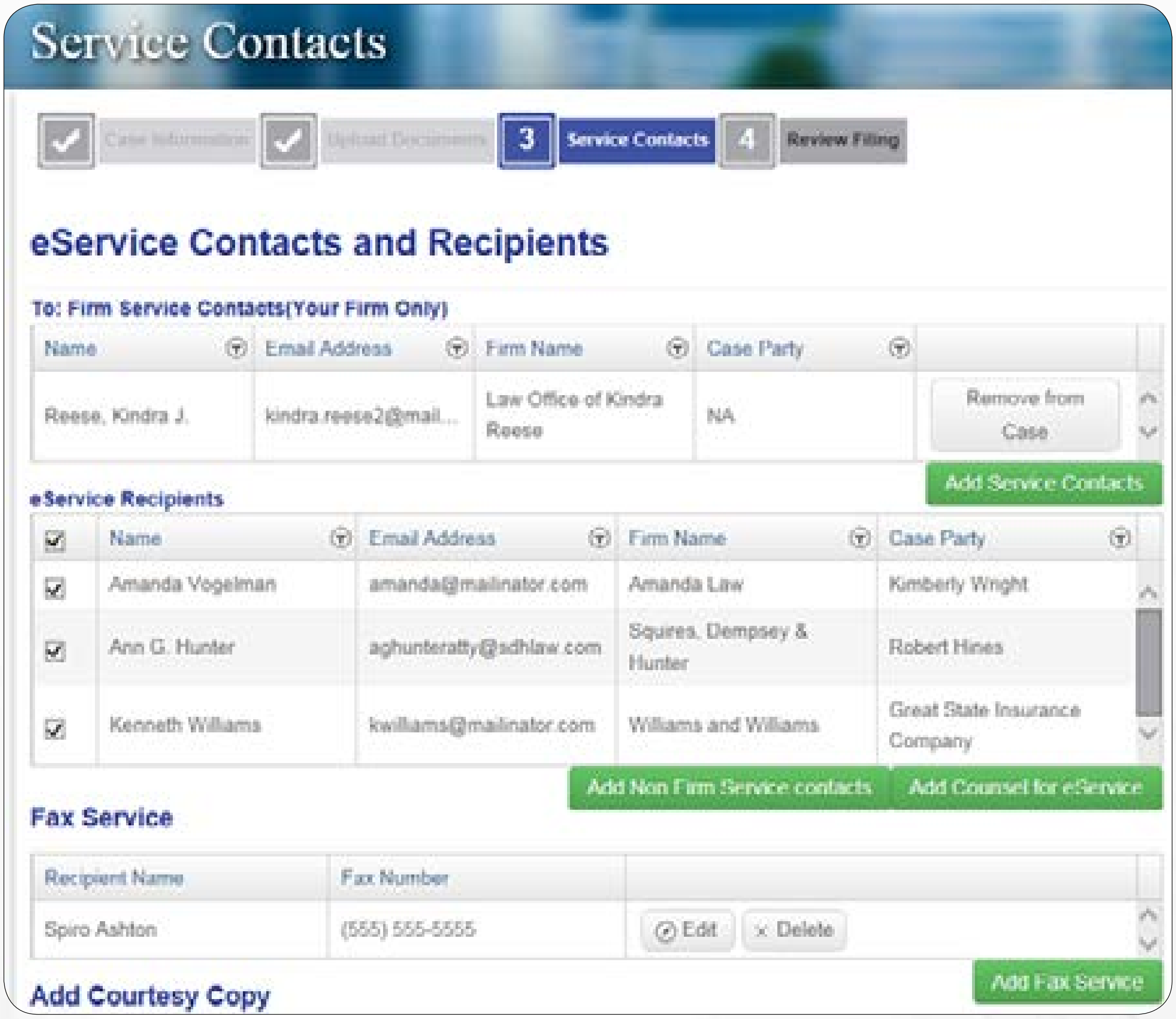


Figure 4-8, Completed Service Contacts Page

Click the **Next** button at the bottom of the page to continue to the **Submission Review** page.

Chapter 5

V. Preparing Your Certificate of Service

A. Generic Certificate of Service

If you do not have time to go through the steps below and you don't know if you will be able to eServe a party when you generate your case documents, you may want to add a more generic certificate of service to those documents.

The two most common variations that we have seen are:

... a true and correct copy of the foregoing document was served upon the following attorney(s) of record in accordance with Rule 21a of the Texas Rules of Civil Procedure:

or

... a true and correct copy of the foregoing document was delivered in accordance with Rule 21a of the Texas Rules of Civil Procedure via First Class U.S. mail to the counsel of record listed below or by electronic delivery for those counsel available through the e-filing system.

B. Check the Case Service Contact List

First, check the case service list to see who is listed with eFileCA as service contacts for t

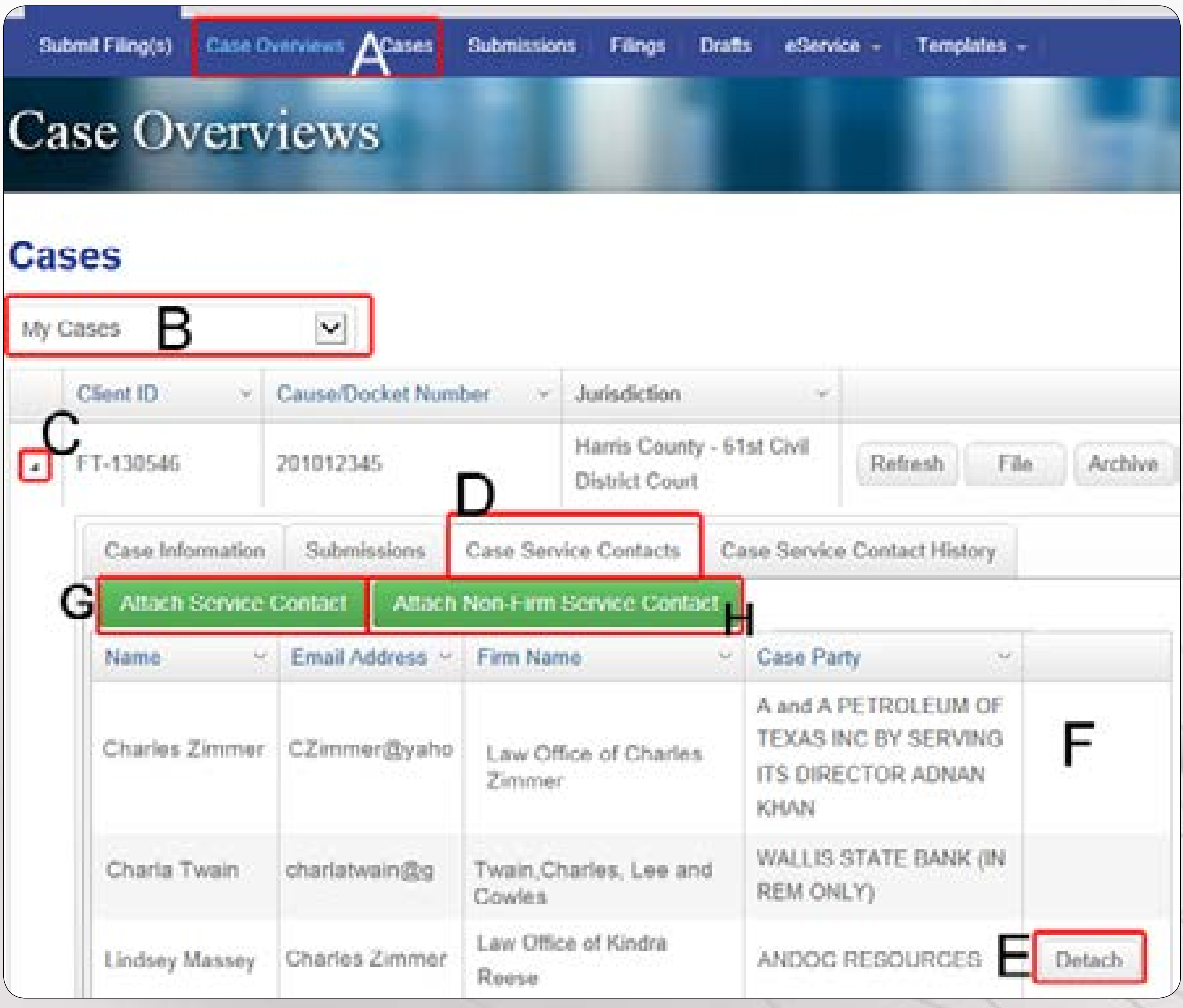


Figure 5-1, Case Service List

Go to either **Case Overviews** or **Cases** (Figure 5-1, A).

Find the case for which you want to see the service list and click the ▸ icon (Figure 5-1, C).

The case tabs display - click the **Case Service Contacts** tab (Figure 5-1, D).

Any names listed as service contacts will be eServed with your next submission. Your firm service contact(s) for the case will show a Detach button (Figure 5-1, E), enabling you to remove them from the case.

Those with no Detach button (Figure 5-1, F) have been opted in for eService by other counsel and you cannot change or remove them.

C. Check the eFileCA Public Service Contact List

In step B above you checked to see what counsel is already on the Service Contact list for the case.

If a counsel is not listed there the next step is to check to see if you will be able to add him/her to your service list from the eFileCA Public Service Contact List.

From the Workspace, click **eServices** (Figure 5-2, A) and then **eServices Search** (Figure 5-3, B).

Figure 5-2, Public Service Contact List Search Feature

On the **Search eService Contacts** page (Figure 5-4), enter any part of the **First Name** (Figure 5-4, A), and/or **Last Name** (Figure 5-4, A), and/or **Firm Name** (**Fi**gure 5-4, C) and click the **Search** button.

Figure 5-3, Search the Public Service Contact List

If the counsel for which you were searching displays, you will be able to add him/her to your service list when you next submit a filing for the case.

D. Add Non-Firm Service Contacts

If you were not able to find counsel in steps B and C above you may still be able to eServe him/her but ONLY if you have an email address for him/her.

If you do have a valid email address for this counsel you will be able to add him/her as a non-firm service contact and so you will also be able to add this counsel to your service list.

E. Add Fax Service Recipients

If steps B and C above don't provide the name of the counsel you seek and if you do not have an email address for that counsel, do you have a fax number for him/her?

If yes, you may be able to have FileTime fax serve him/her for you if you are on one of our pay-per submission fee plans.

Chapter 6

XIV. The eFiling Process - Add Filing(s)

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

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

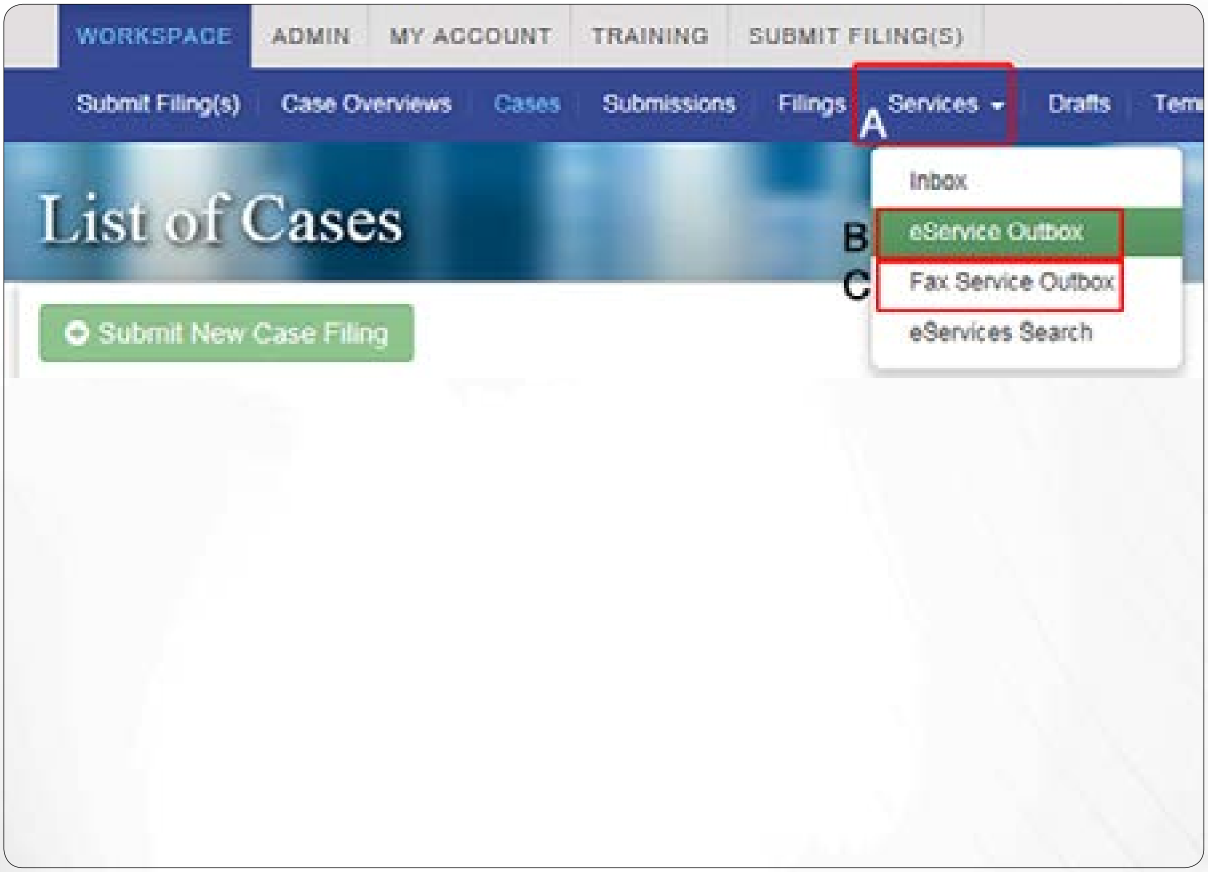


Figure 6-1, The Upload Documents Page

A. Overview of this Page

- **Add Another Filing (Figure 6-1, B) -** Click one of these two buttons to start an additional filing for the submission. Use this option only when the jurisdiction into which you are filing requires that additional document you are submitting must be filed a lead document in a separate filing from the first document you upload. You will find clerk instruction about them when you click the **Clerk Policies** link (**Figure 6-1, L**).
- **Add Another Lead Document (Figure 6-1, C)** - This button serves the same purpose as the **Add Another Filing** button.
- **Filing Type (Figure 6-2, A**) - Leave **eFile and Serve checked** if you want to file court documents and possibly eServed them to counsel. You do not have to eServe the docs with this choice but you have the ability to do so when you leave eServe checked.

Figure 6-2, Filing Type and File Code Options

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

B. Uploading the Lead Document for a Filing

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

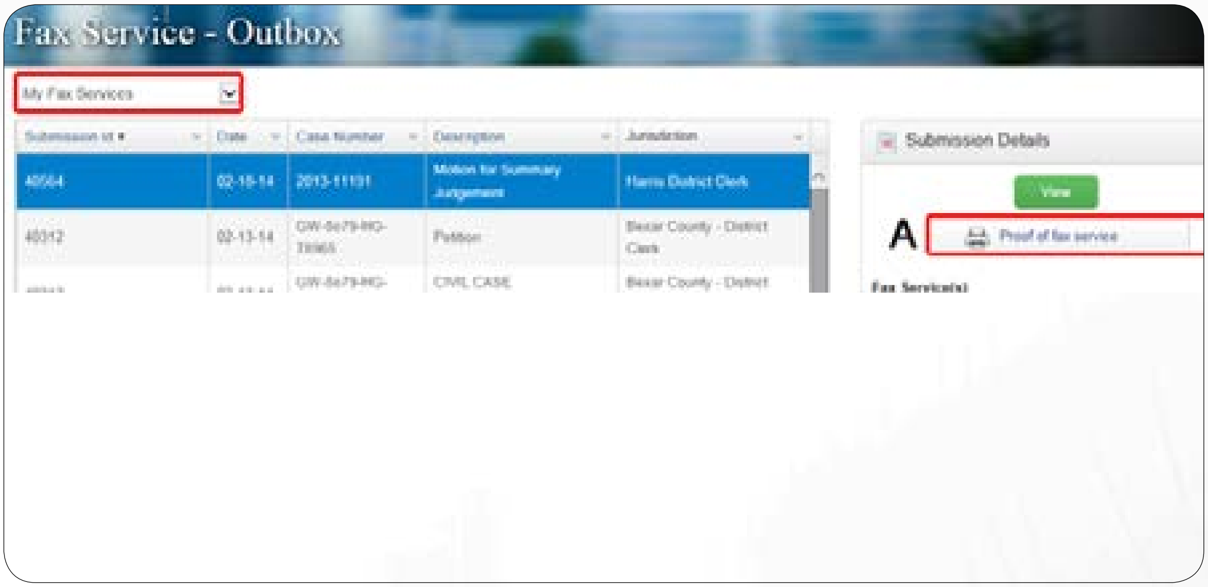


Figure 6-3, Document Upload Section

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

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

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

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

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

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

Figure 6-4, Upload Document Window

1. **File into any jurisdiction OTHER THAN Harris County District Court**

   a. The five important sections of this page are:

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

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

   c. Click the **Select File to Upload** button (**Figure 6-4, C**).

   You are taken to the file navigator for your computer. You will need to know where in your system the document is stored.

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

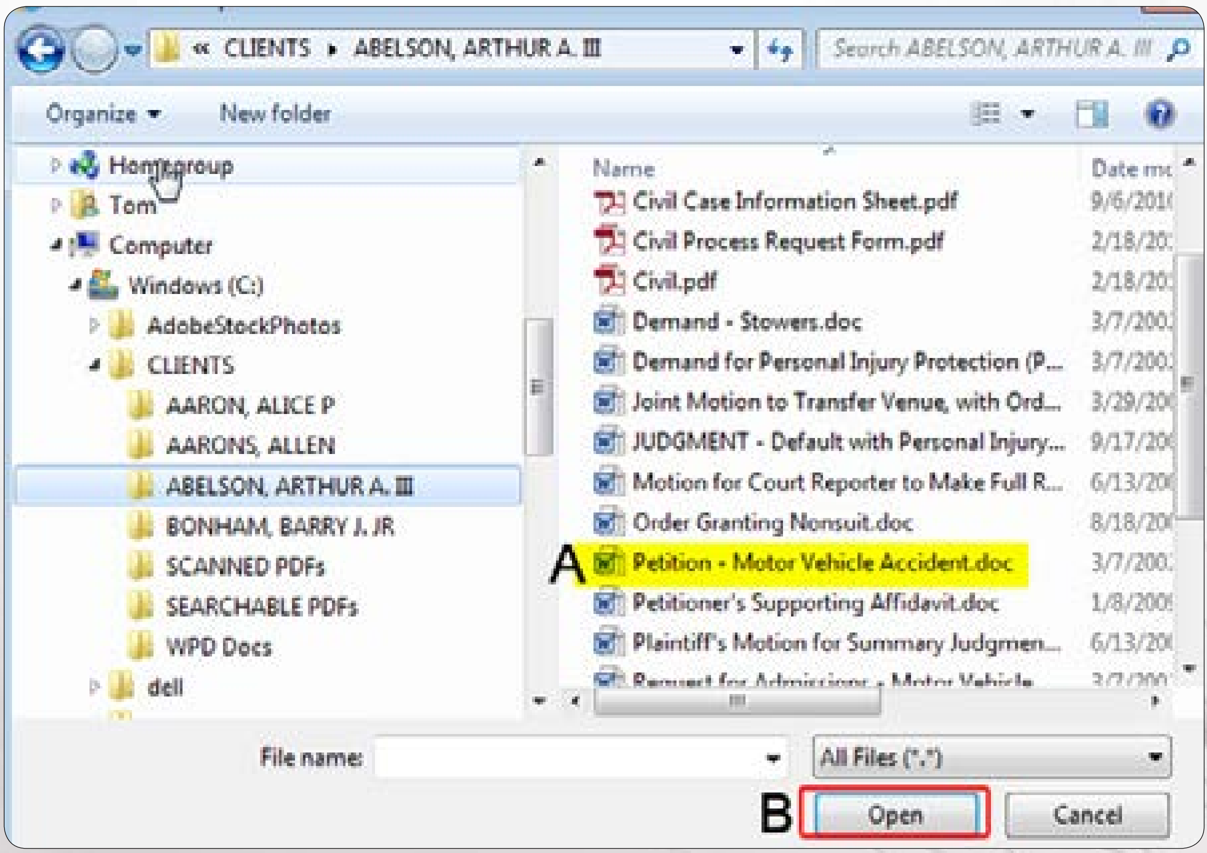


Figure 6-5, Windows File Explorer

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

   Double-click on the file name or

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

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

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

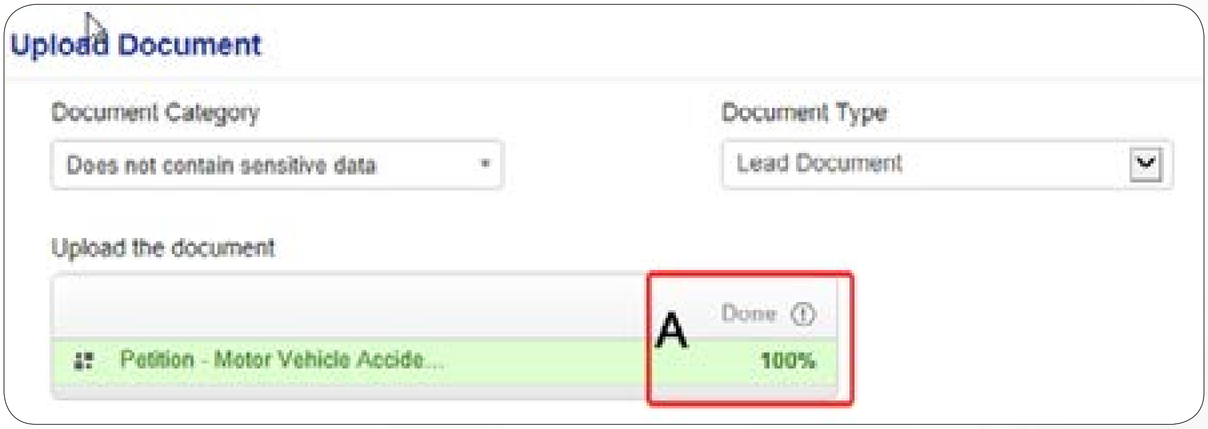


Figure 6-6, Document Upload Completed

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

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

Figure 6-7, Uploaded Document Information

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

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

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

You can also:

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

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

2. File into Harris County District Court

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

Figure 6-8, Select Filing Code for Harris District

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

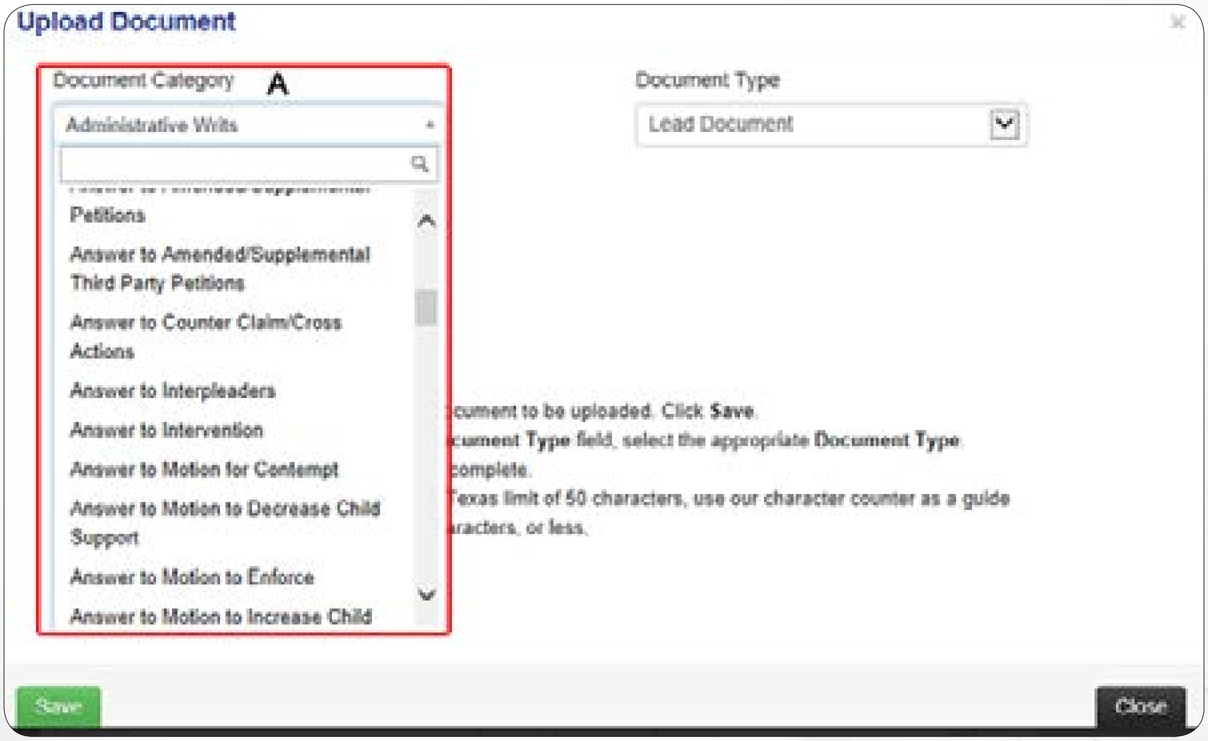


Figure 6-9, Harris District Court Document Category

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

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

The upload process itself is the same in Harris District as it is for the other jurisdictions.

C. Uploading Attachments to the Lead Document

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

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

Figure 6-10, Lead Document Uploaded

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

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

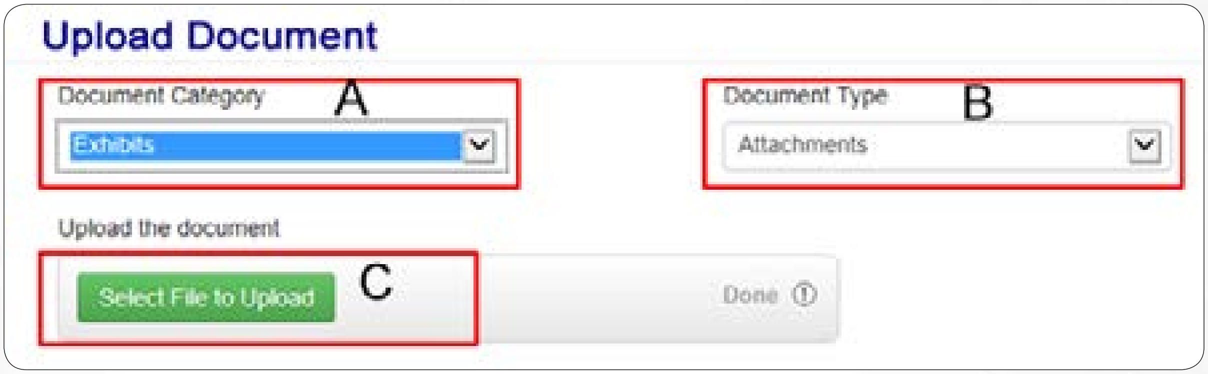


Figure 6-11, Upload Attachments

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

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

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

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

D. Renaming Your Document

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

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

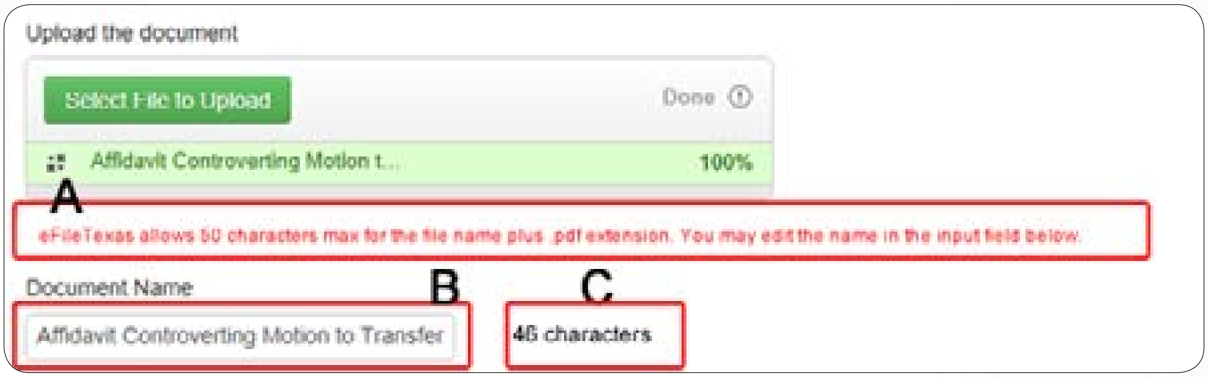


Figure 6-12, Document Name too Long

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

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

Click the **Save** button when completed.

E. Manipulating/Editing/Deleting Your Documents

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

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

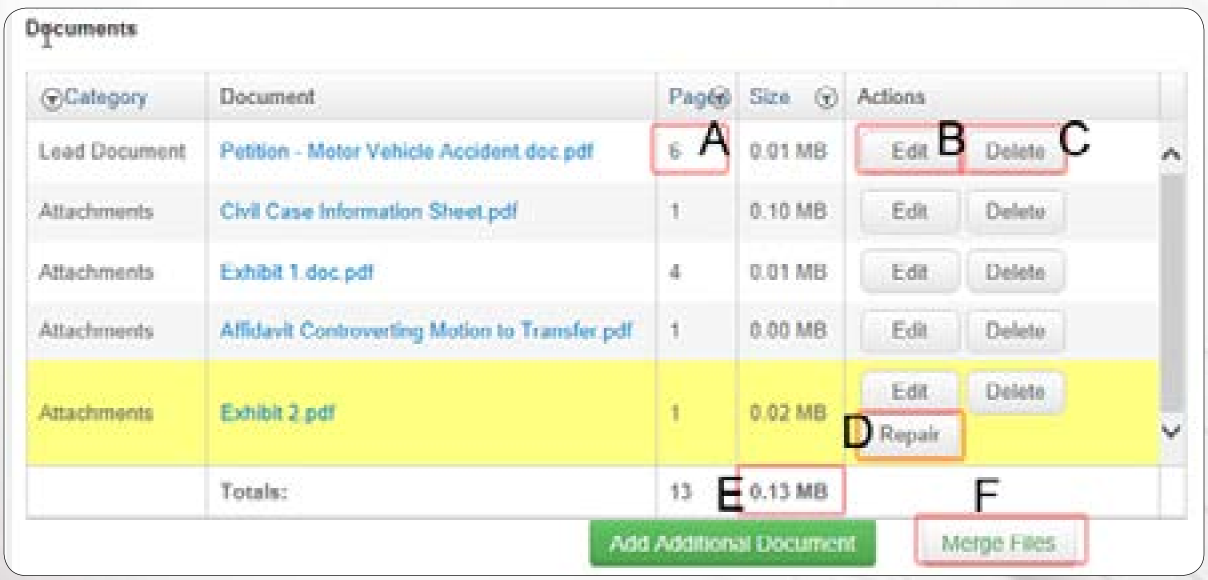


Figure 6-13, Repair Document

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

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

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

Repair button (**Figure 6-13, D**) - FileTime automatically detects when a document's physical dimensions are outside the eFiling system standard or 8.5 inches wide by 11 inches wide. The size discrepancies often occur with scanned documents. The clerk can strike any document outside these dimensions and orientation. If you are on a FileTime Fee plan for which you pay for each filing, you will see the Repair button in these instances. Click the **Repair** button to have FileTime resize and/or reorient your document to the state standard.

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

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

F. Make Your Document Text Searchable

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

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

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

Figure 6-14, Make Text-Searchable button

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

Important Notes:

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

wish, and continue with the submission process.

G. Add Court Services to Your Filing

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

The court service options displayed for you vary by:

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

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

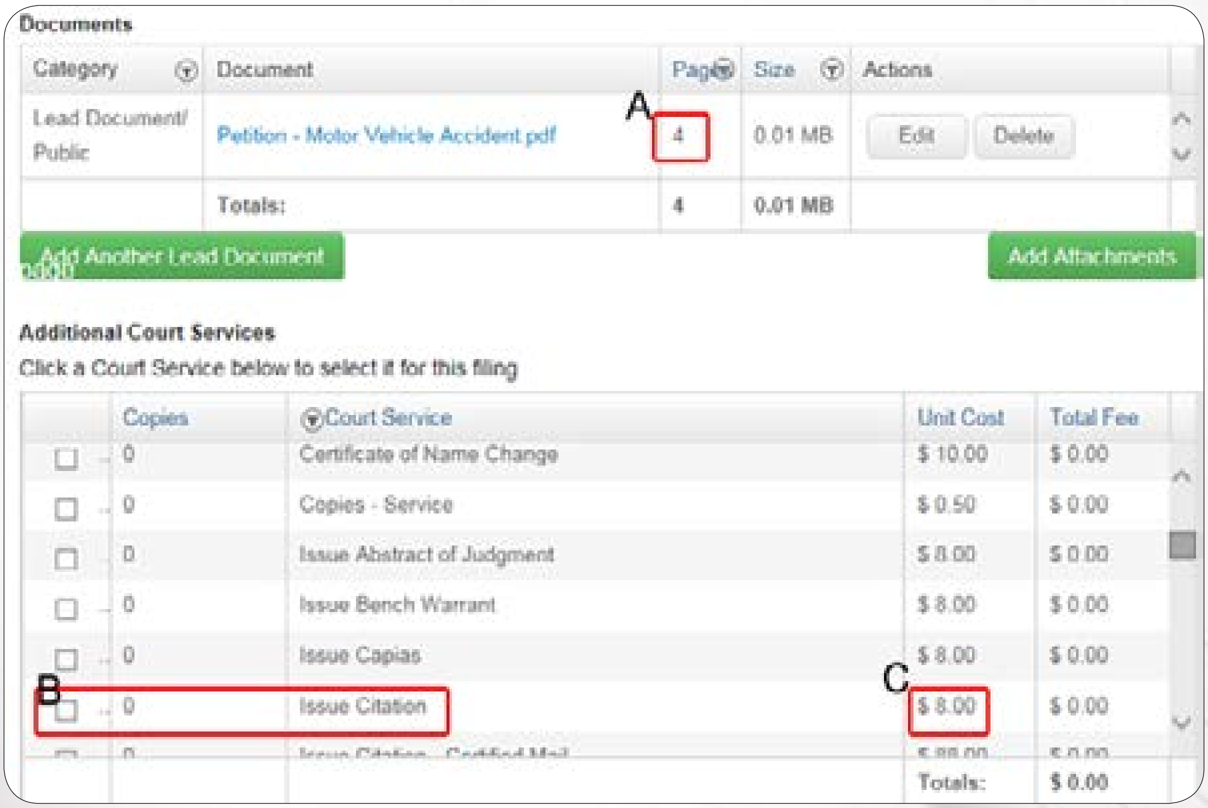


Figure 6-15, Court Services

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

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

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

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

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

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

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

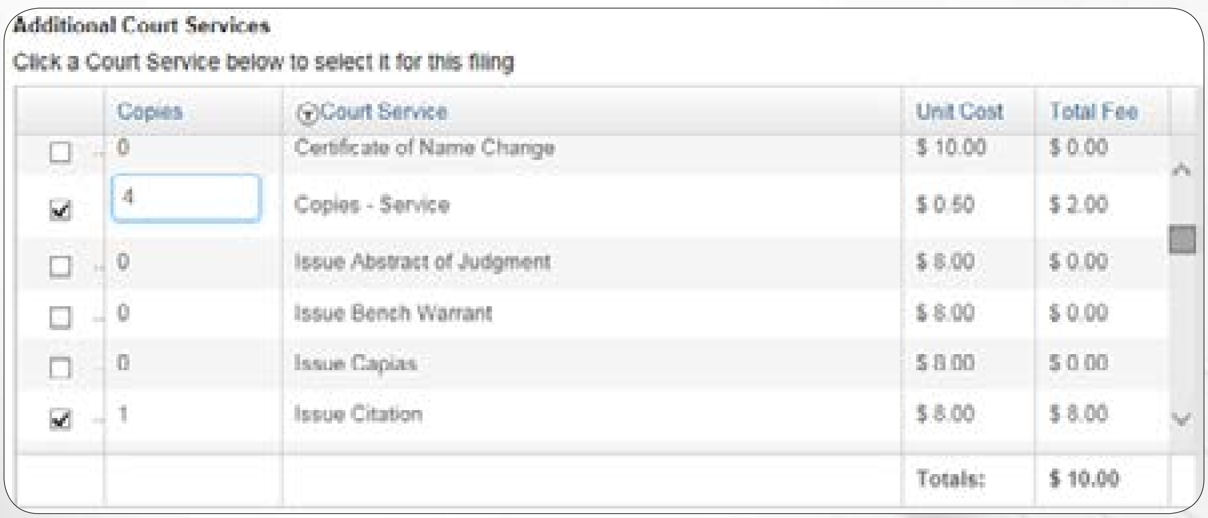


Figure 6-17, Citation and Service Copies Ordered

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

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

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

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

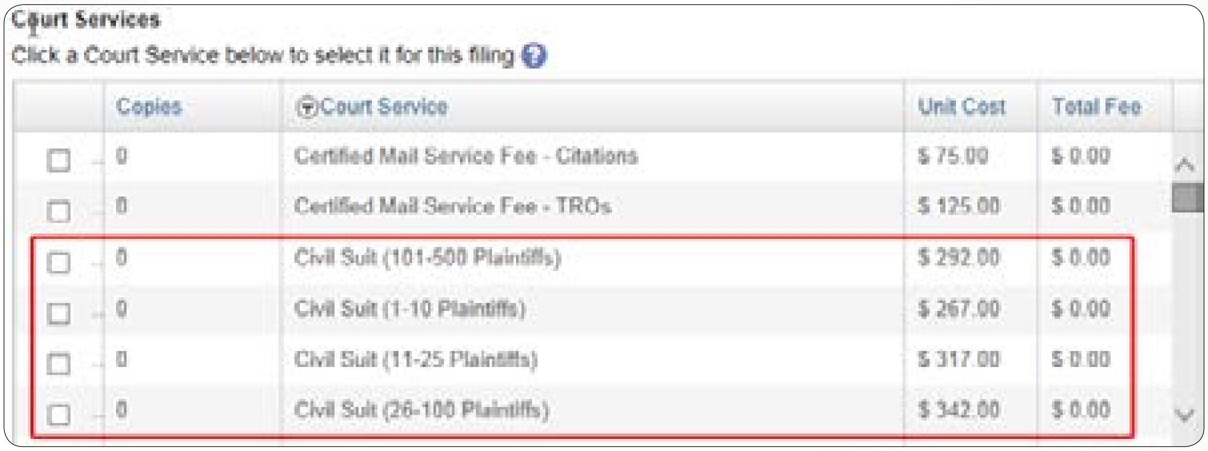


Figure 6-18, Paying the Case Initiation Fee

H. Add Another Filing to the Submission

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

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

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

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

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

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

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

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

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

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

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

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

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

I. Add Comments to the Clerk

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

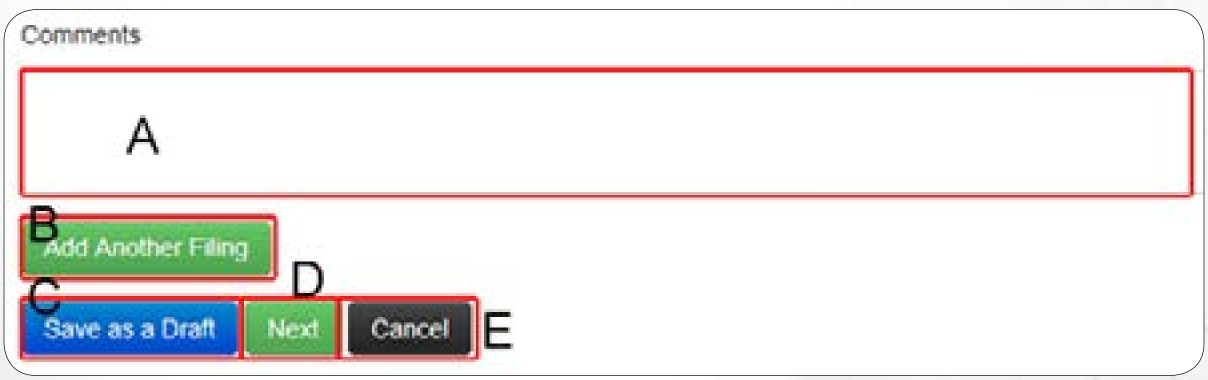


Figure 6-21, Add Comments to the Clerk of Court and Finish the Page

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

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

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

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

Chapter 7

VII. eService Notification Emails

A. 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. **eService Failed**

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

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

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

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

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

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

4. **Filing Failed - eService 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

B. 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.

filetime — Fast and Reliable

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.

C. FileTime Fax Service Notifications

1. Fax Service Successful

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

filetime — Fast and Reliable

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 8

VIII. Retrieving Service Documents

There are three ways to retrieve service documents send to you by counsel in a case:

- Click the document link in the eFileCA Notification of Service email or
- Access the document in your FileTime eService Inbox. This method enables you to view the eServices to any registered member of your firm.
- View the eServices received by your firm by case in the Case Overviews eService Inbox. Any registered firm user can review the eServices by case.

A. eFileCA Notification Email

Each eService recipient will receive the **Notification of Service** email for each filing in the submission. Each notification email will contain a link you click to download the service document(s) associated with that filing.

EFILE TEXAS.gov	**Notification of Service**
	Envelope Number: **84000**

Filing Details	
Case Number	2013-CI-11516
Case Style	Rowe v Price
Date/Time Submitted	10/21/2014 11:01:45 AM
Filing Type	Petition
Filed By	Kindra Reese
Service Contacts	Other Service Contacts not associated with a party on the case: Charles Daniels (**cdaniels@yahoo.com**) Marilee Scott (**mscott@myfirm.com**) Matt Spivery (**matt.spivey@lawfirm.com**)

Document Details	
File Stamped Copy	**https://filerstage.eFileCA.gov/ViewService-Documents.aspx?ADMIN=0&SID=cfb79498-24cc-4b0a-acf1-d2e44334eb3a&RID=d-840f54b-87d6-43af-bd50-3fd3f3bd313a** This link is active for 7 days.

This link is valid for seven days only.

After seven days you can no longer download the service document using this method.

B. FileTime eService Inbox

The FileTime eService Inbox feature saves the service document(s) associated with each eService to you for at least six months.

From the **Workspace** (Figure 8-2, A), click **Services** (Figure 8-2, B) on the sub-navigation bar.

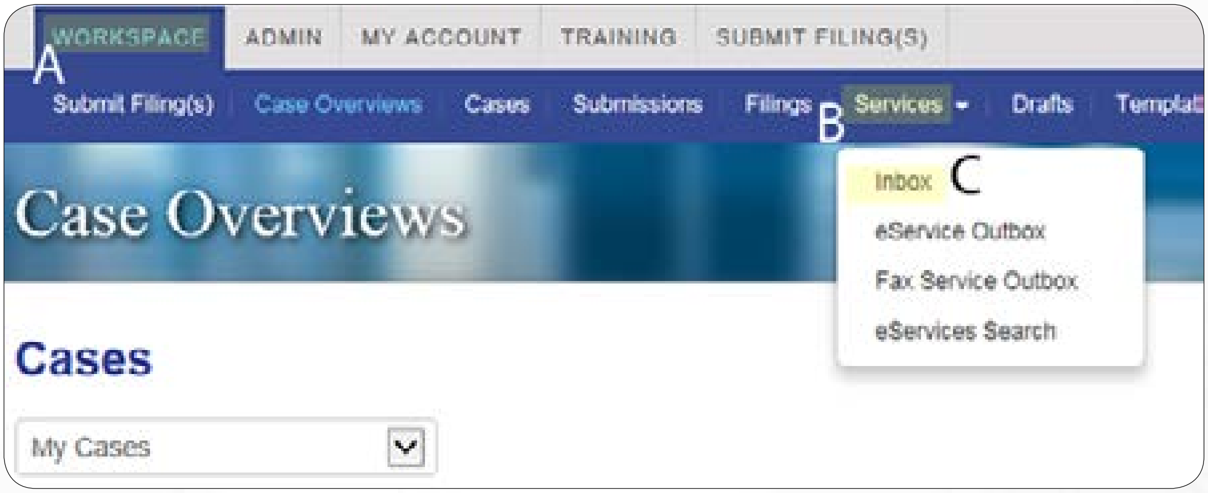


Figure 8-2, Access the eService Inbox

Be sure to select for whom (Figure 8- 3, A) you want to view the Inbox. The selector (Figure 8- 3, B) will default to **My Services** or the last selection you made.

Figure 8-3, Select Service Contact for Viewing eServices

You can click the drop-down selector and choose a name to view any eServices sent to that specific firm service contact.

You can also type in a name (Figure 8- 3, B) and let FileTime find the name of the list for you - especially helpful if your firm is large.

If a name is not found on this list it means that either (1) the person has not been eServed or (2) that person has not yet had an eFiling submitted in his/her name through FileTime so eFileCA is not sending us eService notifications for that person.

The **Service - Inbox** page opens (Figure 8- 4**)**.

Find the eService for which you want to print the service document(s) and click the row to highlight it.

The **eService Details** section opens in the right column (Figure 8- 4, A).

In the bottom of the **eService Details** section you will find a link (Figure 8- 4, B) to click and download the service document(s).

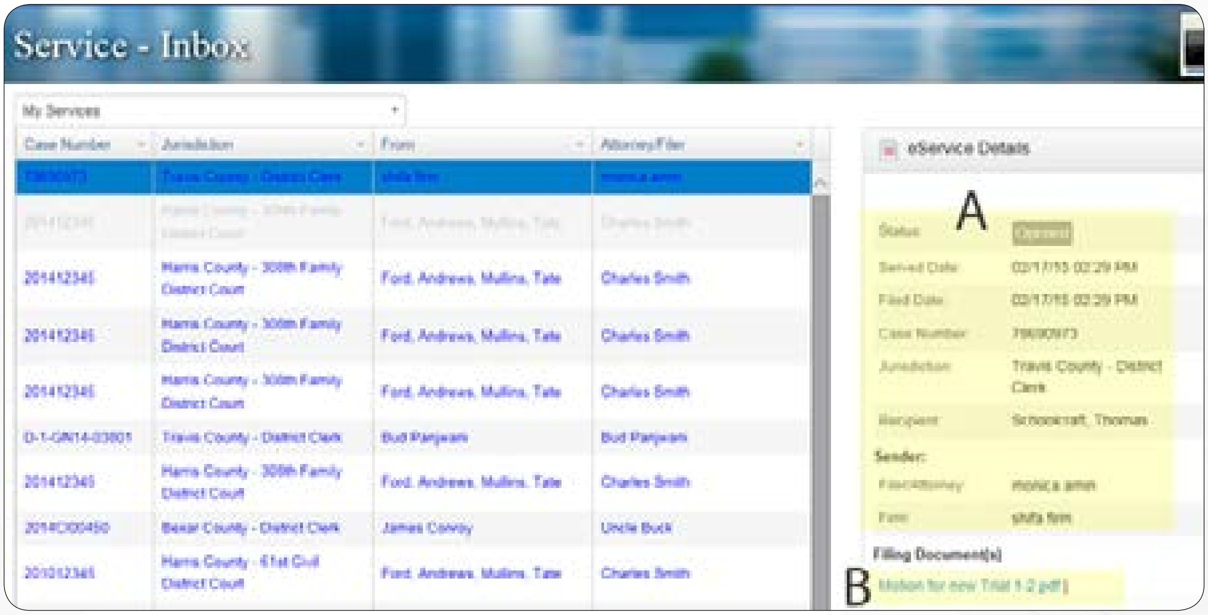


Figure 8-4, Print the Service Document(s)

C. Case Overviews eService Inbox

Any firm member can view all eServices received by your firm, by case, in the FileTime Case eService Inbox. And, FileTime saves the service documents for at least six months, and often longer.

After logging into FileTime, you are taken to the **Case Overviews** page (Figure 8- 5, A) by default.

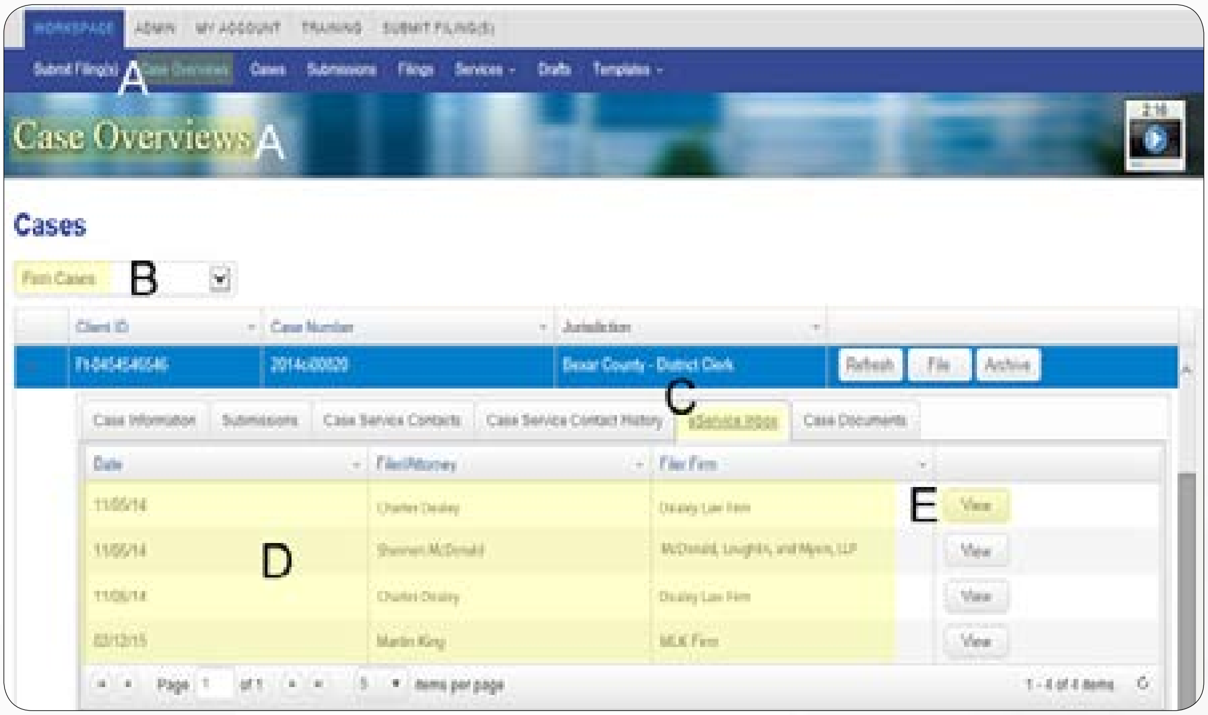


Figure 8-5, Case Overviews eService Inbox

If you are searching for cases in which you have eFiled, leave the Cases selector set to **My Cases** (**Fig**ure 8- 5, B). Change it to **Firm Cases** to search for cases submitted by other firm members. Select **Archived Cases** to view the eServices for closed cases you firm has archived.

Click the **+** in the far left column and the case tabs open below the case.

Click the **eService Inbox** tab (**F**igure 8- 5, C).

All the eServices your firm has received for the case are displayed (Figure 8- 5, D).

IMPORTANT NOTE: eFileCA sends eServices for a case to FileTime only after the receiving service contact has submitted a filing, or one has been submitted on his/her behalf.

Click the **View** button (Figure 8- 5, E) and the **eService details** page opens (Figure 8-6).

Figure 8-6, eService Details

Click the link(s) to the document(s) to view them or click the **Print** button.

IX. FileTime Fax Service

A. FileTime Fax Service Cover Letter

Each FileTime fax service contains a cover letter (Figure 9-1).

Law Office of Kindra Reese Received Tue 11/11/14 05:16 PM

TRCP 21a. - Service by Telephonic Transfer

As provided by TRCP 21a, this document is sent to you using FileTime Fax Service.

Date:	11/11/14 05:16:PM
To:	Buck Harrison
Fax Number:	(888) 859-2349
From:	Kindra Reese Law Office of Kindra Reese 123 High Point Dr PO Box 5834 San Antonio, TX 78246
Phone Number:	(210) 555-5555
Re:	
Service Document(s):	No Fee Documents (Appearance of Co-Counsel.pdf)

Case Number	2009CI08092
Court	bexar:dc
Jurisdiction	Bexar County - District Clerk
Total Number of Pages:	3 (including cover sheet)

PRIVILEGED AND CONFIDENTIAL
This facsimile transmission may contain privileged confidential information and is intended for the sole use of the addressee. If you are not the intended recipient, or the person responsible to deliver the message to the intended recipient, you are hereby advised that any dissemination, distribution or copying of this communication is prohibited. If you have received this facsimile in error, please notify the sender and destroy all copies of the original facsimile message.

Figure 9-1, FileTime Fax Service Cover Letter

B. FileTime Fax Service Outbox

Form the Workspace, click **Services** on the sub-navigation bar (Figure 9-2, A) and then **Fax Service Outbox** on the drop-down menu (Figure 9-2, C).

Be sure to select the correct person (Figure 9-2, C) for whom you want to check the Fax Service Outbox.

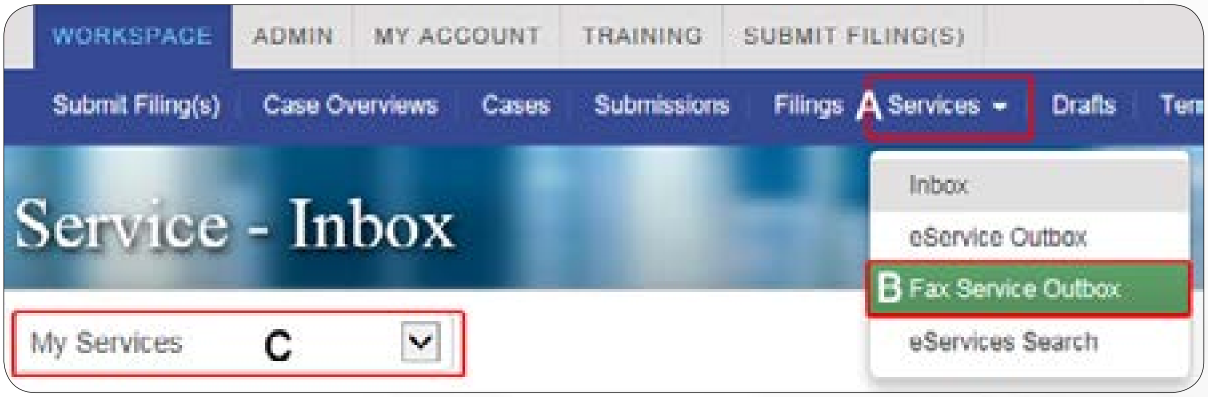


Figure 8-2, Navigate to the Fax Service Inbox

On the **Fax Service - Outbox** page (Figure 9-3), click on row of the submission for the fax service you want to view. It will be highlighted after you click on the row.

The **Submission Details** section for that submission opens in the right column.

Click the **Proof of Fax Service** button (Figure 9-3, A) to print a **Proof of Fax Service**.

The status of the fax services for that submission also displays (Figure 9-3, B).

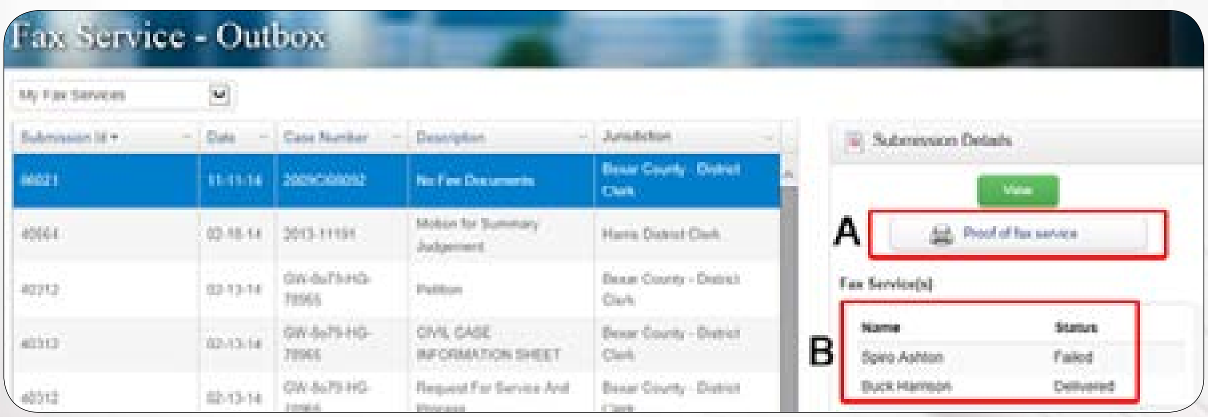


Figure 9-3, Fax Service - Outbox

Chapter 10

X. Possible eService Issues

A. Not Receiving Notification Emails

There are at least 3 possible reasons for you not receiving you eService Notification emails:

1. Spam Filters Out Your eMails

The most common reasons for not receiving the notification emails from eFileCA is because your spam filtering software is moving those emails to a spam folder.

You should white list the following email addresses:

- No-Reply@eFileCA.gov
- Support@filetime.com

You will find information about how to white list email addresses **here**.

2. You Are Being eServed to an Inactive Email Address

A second possible issue is that someone in another firm added you as a non-firm service Contact because you had not opted in to receive eService for that case. Unfortunately, they did so with an old email address you no longer monitor.

3. You Are Being eServed to Your Old Firm eMail Address

A third possible reason is that your old firm, through which you were added to the eFileCA Public Service Contact List, did not delete your account after you left them. Therefore, eServices to you are going to your prior firm email address.

B. Can't Delete Attorney from Case Service List

The primary reason that you cannot delete on of your firm members from a case service list is because another firm added your firm member as a non-firm service contact for their firm.

Only they of eFileCA will be able to remove your firm member from the case service list. If there is only one or two other counsel to the case you might wish to call them and ask them to remove your firm member from the case service list.

Or, call the FileTime Customer Support team and we will ask eFileCA to do so for you.

C. Can't See eServices in My Inbox

eFileCA sends us no eService notifications until he/she has submitted at least one eFiling through FileTime. So, the filer needs to do so in order for us to begin displaying eServices to him/her in the Inbox.

XI. Managing Service Contacts and Service Recipients

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

A. Manage Your Firm Contacts Outside of a Filing

After logging into your firm account, you will be, by default, on the **Case Overviews** page (Figure 11-1, A). You can also perform the following from the **Cases** page.

Figure 11-1, Case Service Contacts

By default, FileTime displays for you only your own cases (Figure 11-1, B). You can click the drop-down arrow to select to view all of your firm's cases or all the cases your firm has archived.

Find the case for which wan to view or manage the service contact list. Click the right-pointing arrow (Figure 11-1, C) to open the display tabs for that case.

Click the **Service Contacts** tab (Figure 11-1, D).

eFileCA only allows you to delete your firm's service contacts so any of your firm's service contacts that you have assigned to the case will show the **Detach** button (Figure 11-1, H) in the actions column.

Any case service contacts for counsel will be blank in the actions column (Figure 11-1, F).

Click the **Attach Service Contact** button (Figure 11-1, E) to attach a service contact for your firm to this case.

B. Managing Service Contacts and Cases

A firm eFiling administrator can view all cases to which a service contact is associated. The Admin can also quickly dissociate service contacts with all firm cases.

This feature comes in very handy, for instance, when an attorney leaves the firm and service contacts for that attorney's cases reassigned.

As a firm eFiling Administrator, login to FileTime and click the **Admin** button (Figure 11-2, A).

On the **Admin** sub-menu, click the **Service Contacts** button (Figure 11-2, B), and then **Firm Service Contacts** on the drop-down menu (Figure 11-2, C).

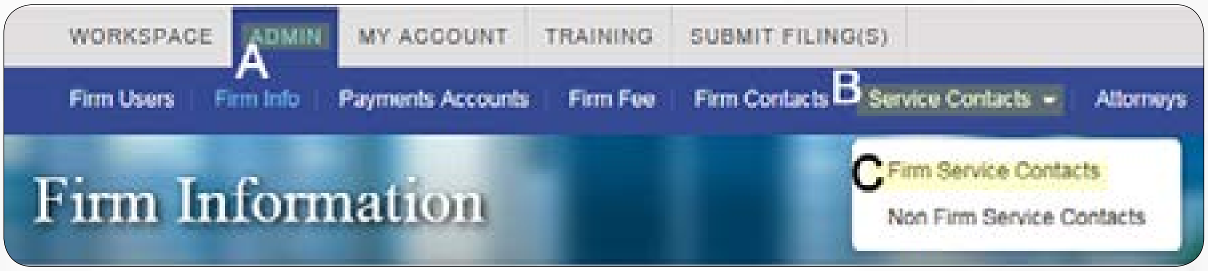


Figure 11-2, Firm Service Contacts

You are taken to the firm **Service Contacts** page (Figure 11-3).

Figure 11-3, Cases Associated with the Service Contact

Find the service contact in question and click the **+** sign in the far left column (Figure 11-3, A).

The **Cases** tab (Figure 11-3, B) opens below by default.

Displayed are all the cases to which this service contact is associated. (Figure 11-3, C).

Click the **Detach** button (Figure 11-3, D) to dis-associate the service contact from a case.

After you dis-associate a firm service contact for a case, the service contact will no longer be listed as service contact for your firm for that case.

Chapter 12

XII. 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 12-1) is reached by logging into FileTime, clicking the **Admin** button and then the **Firm Contacts** button on the sub-navigation menu.

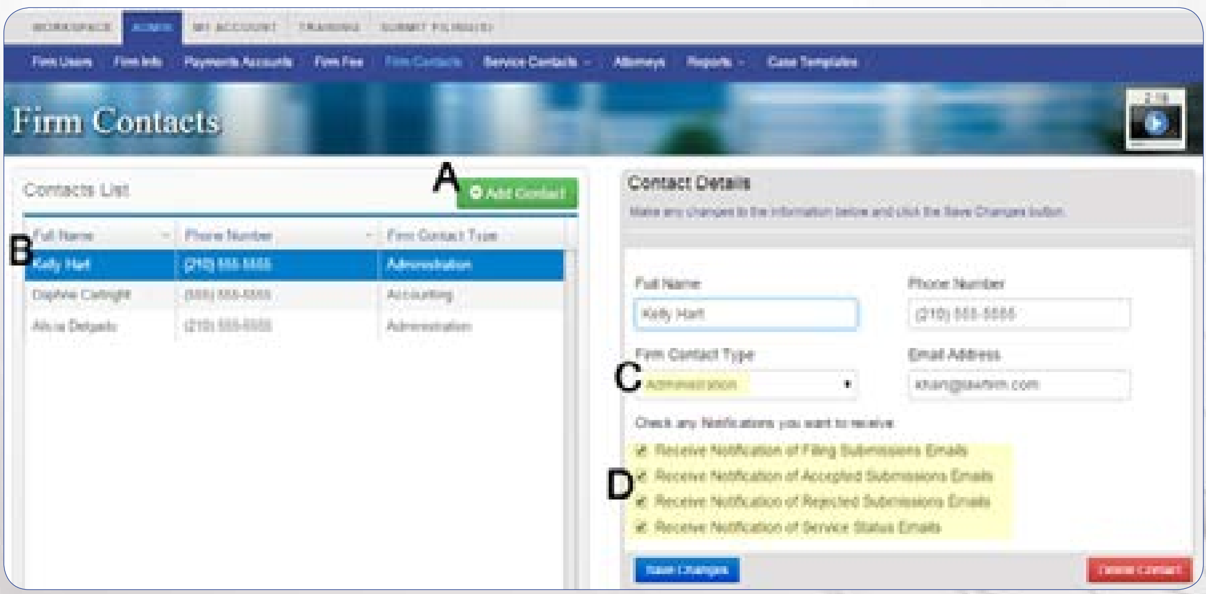


Figure 12-1, Set Up Firm Contacts and Notification Email Preferences

1. Add a New Firm Contact

Click the **Add Contact** button (Figure 12-1, A) to add a new firm contact.

In the **Add Firm Contact** window (Figure 12-2):

- Leave the default of **New Contact** (Figure 12-2, 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 12-2, C).
- Click the **Add Firm Contact** button when done.

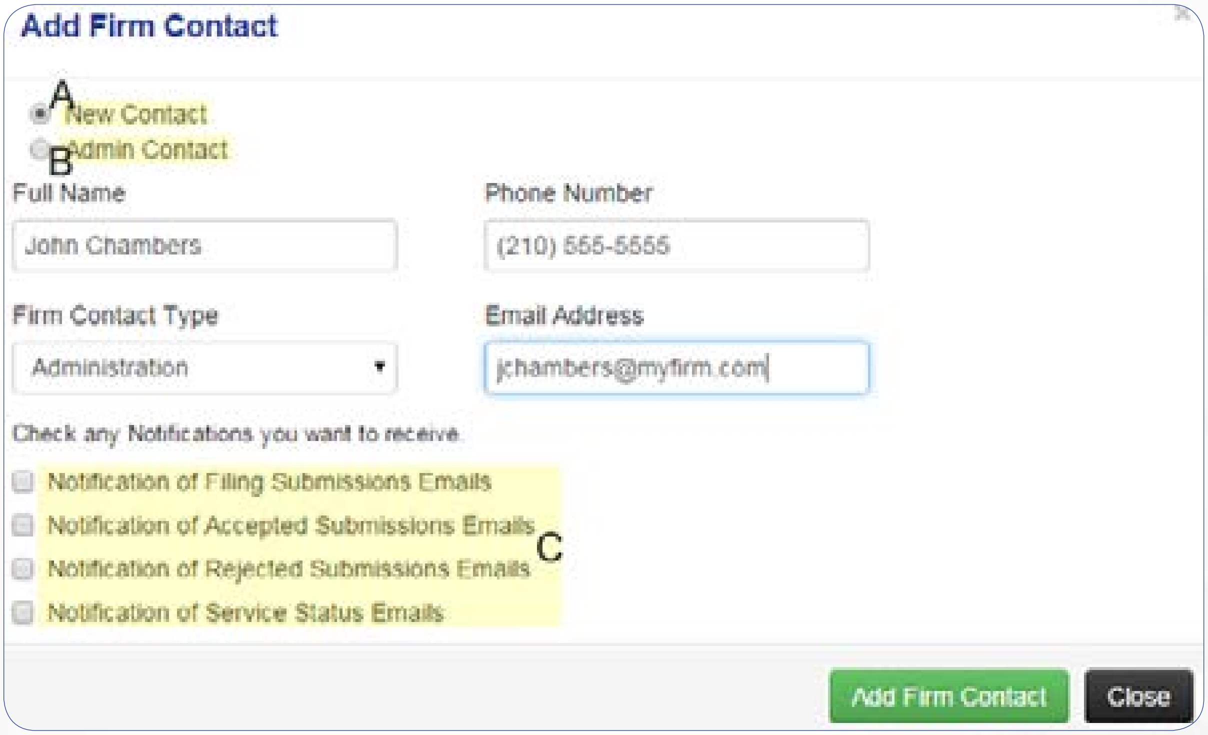


Figure 12-2, Add Firm Contact

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 12-1, D).

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

   Check or uncheck any notification emails (Figure 12-1, 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 12-3, 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 12-3, B).

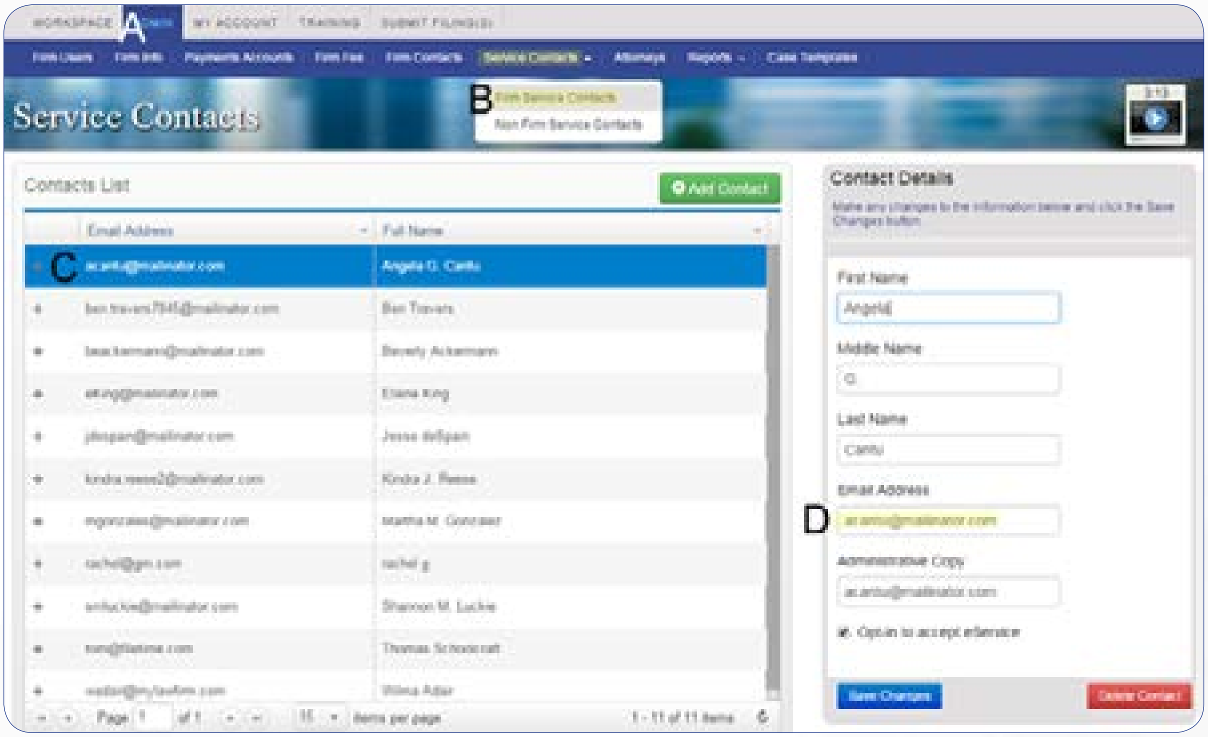


Figure 12-3, Add Administrative Copy Email Address to User

Find the name of a firm attorney to highlight his/her name (Figure 12-3, 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 12-3, 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 12-4, A).

Click the down arrow to the right of the **Notification Options** button (Figure 12-4, B).

Click **eService Notification Copies** on the drop-down menu (Figure 12-4, C).

On the **eService Notification Copies** page (Figure 12-4) you will see all individuals (Figure 12-4, E), if any, already added to receive copies of eService Notification emails sent to you.

Click the **Add eService Notification** button (Figure 12-4, F) to add a new recipient.

Let FileTime guide you in adding the new recipient.

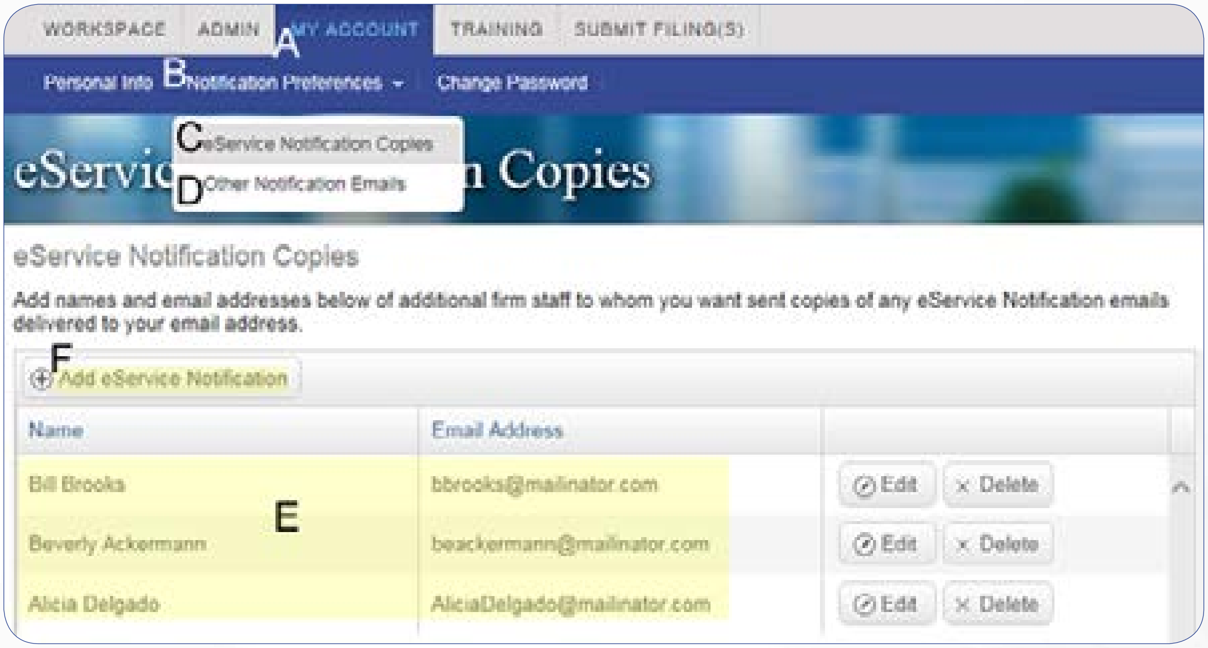


Figure 12-4, eService Notification Options

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.

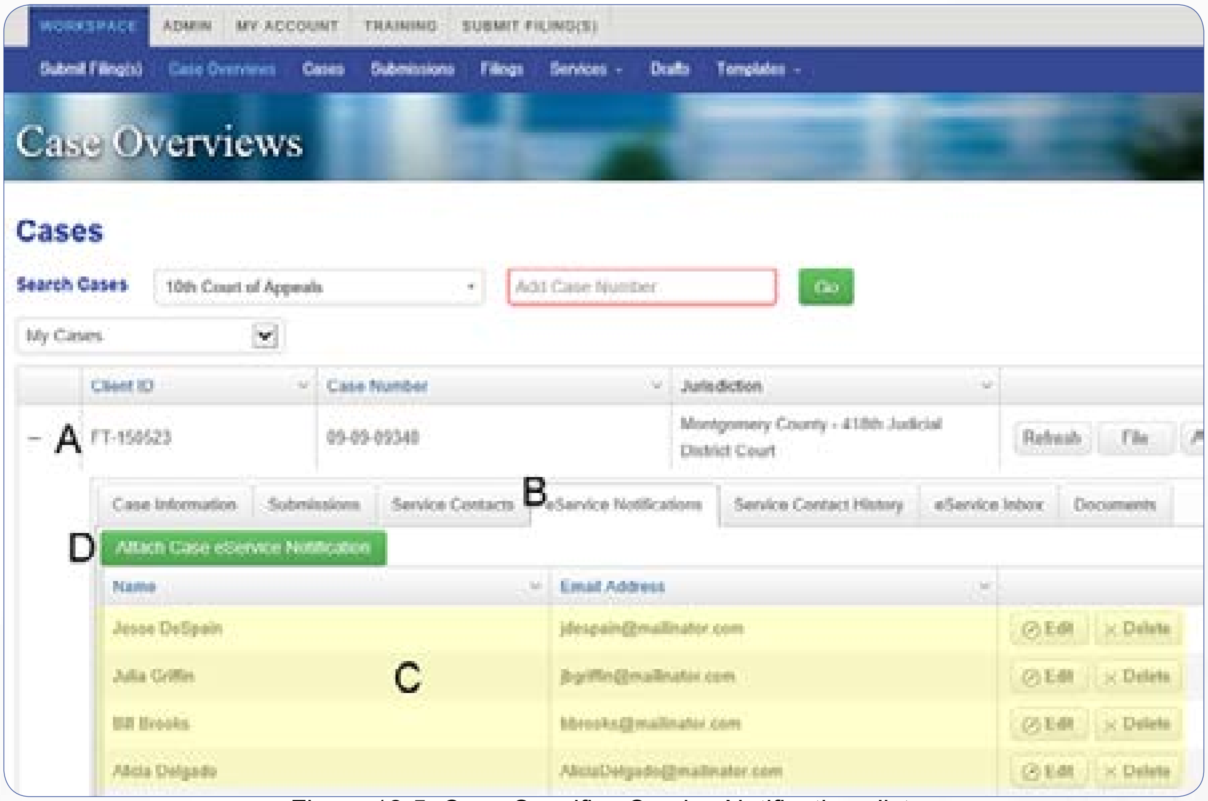


Figure 12-5, Case-Specific eService Notifications list.

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 12-5, A).

The case tabs open below the case.

Click the **eService Notifications** tab (Figure 12-5, B).

Any recipients that your firm has already added for the case will display (Figure 12-5, C).

Click the **Attach Case eService Notification** button (Figure 12-5, 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 12-4, A).

Click the down arrow to the right of the **Notification Options** button (Figure 12-4, B).

Click **Other Notification Emails** on the drop-down menu (Figure 12-4, D).

You are now on the **Other Notification Emails** page (Figure 12-5).

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.

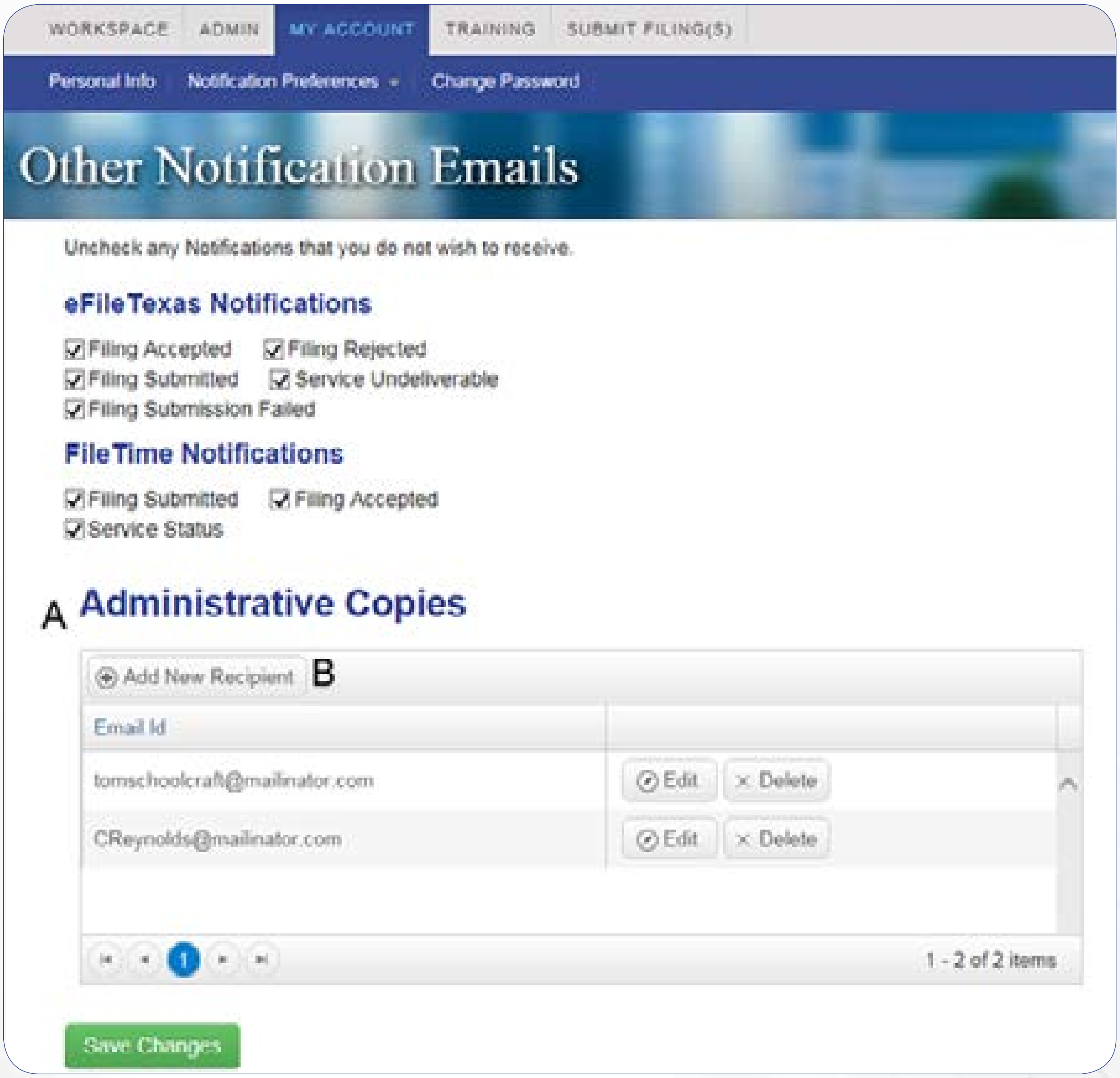


Figure 12-6, Opting Out of Notification eMails and Adding New Recipients

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 12-6, 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 12-6, 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 13

XIII. 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

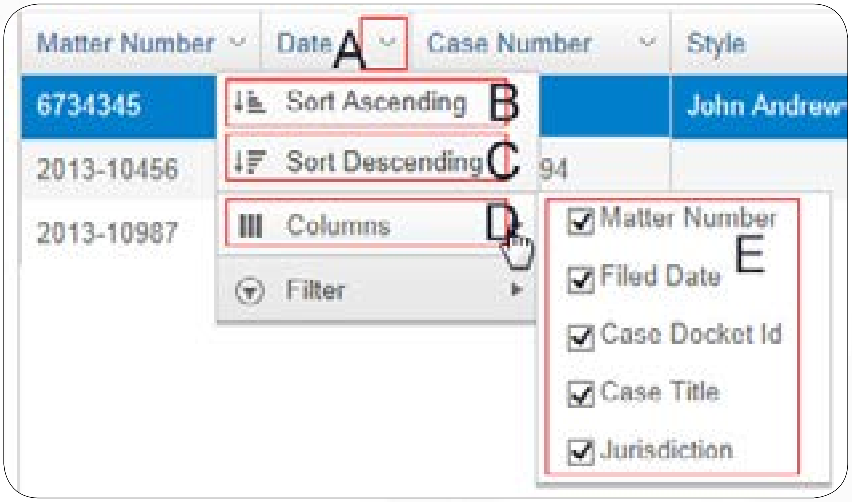
You will find a filer like the one below (Figure 13-1) on the Case Overviews, Cases, Submissions, and Filings pages. Most of your firm filers will probably be interested in seeing only their own Cases, Submissions, or Filings.

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 13-1, Firm/Personal Filter

B. Sorting Grid Columns

Click the icon (Figure 13-3, A) to open the options shown in Figure 13-2.



13-2, Grid Sorting and Display Options

Click the **Sort Ascending** button (Figure 13-2, B) to organize all the rows of data in that column in **Ascending** order.

Click the **Sort Descending** button (Figure 13-2, C) to organize all the rows of data in that column in **Descending** order.

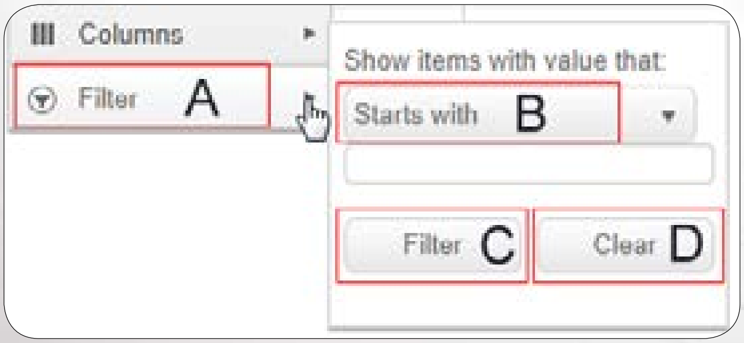
C. Customizing Grid Columns

You can also control which columns display on your grids. The columns that are checked (Figure 13-2, E) will display. Let us know if you want to see other options and we can add them in a future update.

Searching in Grids

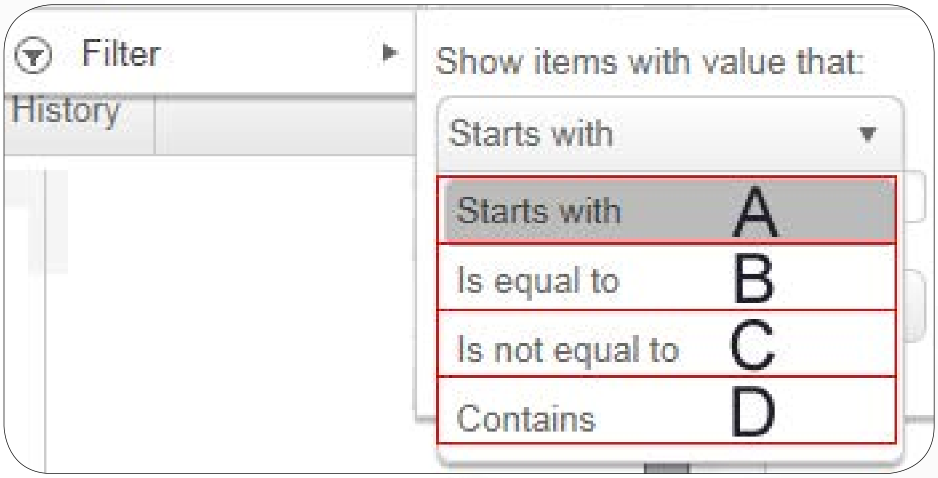
Use the FileTime filtering options to quickly find the specific case, name, email address, etc. in the appropriate grid column.

Clicking the **Filter** button (Figure 13-3, A) opens powerful search/filtering capabilities to you.



13-3, Searching the Column

1. **The Filter-type (Figure 13-3, B) button provides you four options:**



13-4, Filtering Options

- **Starts with (**Figure 13-4, A**)** - Select this choice and you will filter for any records that start with the data you enter in Figure 13-3, C.
- **Is not equal to (**Figure 13-4, 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 13-4, C**)** - Select this option and only records that are exact matches to what you enter into **C** will be displayed.
- **Contains (**Figure 13-4, 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 13-3, C).

2. **Enter your search criteria in the Filter Criteria field (Figure 13-3, C).**

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

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

   Click the **Filter** button (Figure 13-3, 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 13-3, E) to clear all the selections you made above and start over.

D. 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.

13-5, Drill Down for Case Information

Click the ▸ icon (Figure 13-5, A) in the left column of the row you wish to drill-down. That opens the case tabs for that case (**F**igure 13-5, 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 13-5, C).

E. 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 13-6) of the grid provides ways to quickly view all the rows on the grid.

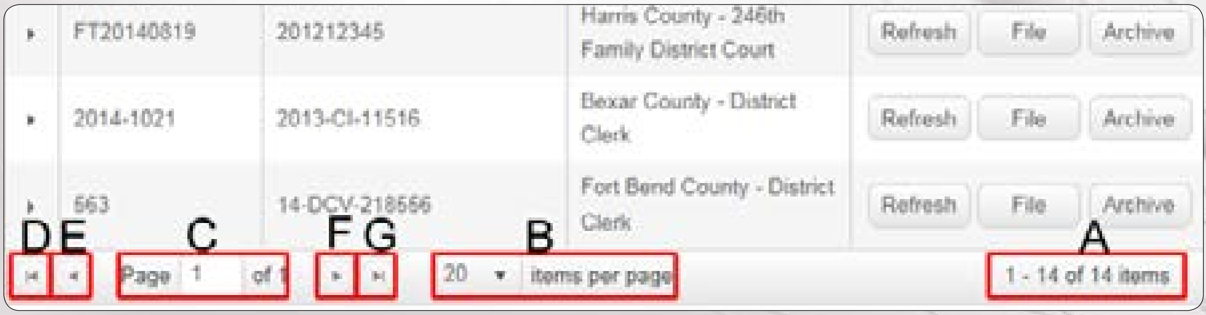


Figure 13-6, The Grid Navigator

- **Total Records** (Figure 13-6, 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 13-6, B) - You have multiple selections concerning how many rows you want FileTime to display.
- **Page Displayed** (Figure 13-6, 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 13-6, D) - Click this button and you are returned to the page containing the first record.
- **Go Back One Page** (Figure 13-6, E) - Click this button to go back one page.
- **Go Forward One Page** (Figure 13-6, F) - Click this button to go forward one page.
- **Go to End** (Figure 13-6, G) - Click this button to go to the last page.

Chapter 14

XIV. 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.

- **Administrator's Guide**- This is the bible for firm eFiling administrators..
- **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.